



Needs Assessment Briefing Paper – Investment Options

Rochford District Council and
Brentwood Borough Council

November 2023



1. Executive summary – potential investment options

- 1 SLC has undertaken an initial assessment of need to help identify potential investment opportunities which are to be tested as part of the procurement of a new leisure contract for Rochford District and Brentwood Borough Councils.
- 2 This needs assessment will inform a decision from the Councils on the preferred options to be progressed to a further stage of design, costing and business planning.
- 3 The following has been considered as part of this needs assessment:
 - ▶ Engagement with key internal and external stakeholders in Rochford District and Brentwood, identified through discussion with the Council
 - ▶ Public engagement with leisure facility users and the wider general public through an online survey
 - ▶ A review of core documents including condition surveys, previous feasibility studies and strategic planning documents (e.g. Indoor Built Facility Strategies.)
 - ▶ Market assessments through 4global which consider the likely levels of demand generated by the catchment population against existing and enhanced facilities based on live activity data at a national level and participation survey data

Investment options for exploration

- 4 The following investment options have been identified for further exploration with the Councils, with the intention of agreeing which options should be taken forward for further development:

Brentwood Centre

- ▶ **Extension of gym facility** – potentially to include a ‘health and wellbeing hub’ area for less able / less confident users which offers more privacy, more inclusive / accessible equipment with a different ‘look and feel’ to the traditional gym offer
- ▶ **Additional flexible space / studio provision** – which supports development of the core group exercise programme but can also be used flexibly by community groups / health partners, particularly during quieter daytime periods
- ▶ **Refresh of pool hall and wet side changing areas**
- ▶ **Refresh of ancillary areas that support events** – additional bar / seating arrangements, improved changing and toilet facilities
- ▶ **Accessibility improvements** – e.g. Changing Places provision, improvements to circulation spaces / step free access, addition of accessibility features like automatic doors etc.
- ▶ **Inclusion of consultation rooms** – e.g. to accommodate health and community partners
- ▶ **Enhanced provision for children and young people** – e.g. soft play and / or climbing
- ▶ **Enhancements to outdoor space** – e.g. covered outdoor studio / exercise area (courtyard near pool hall) and / or padel tennis courts (near 3G pitch and beach volleyball)

Clements Hall Leisure Centre

- ▶ **Extension of gym facility** – potentially to include a ‘health and wellbeing hub’ area for less able / less confident users which offers more privacy, more inclusive / accessible equipment with a different ‘look and feel’ to the traditional gym offer
- ▶ **Additional flexible space / studio provision** – which supports development of the core group exercise programme but can also be used flexibly by community groups / health partners, particularly during quieter daytime periods
- ▶ **Refresh of pool hall and wet side changing areas**
- ▶ **Accessibility improvements** – e.g. changing places, inclusion of pool pod, improvements to circulation spaces / step free access, addition of accessibility features like automatic doors etc.
- ▶ **Inclusion of consultation rooms** – e.g. to accommodate health and community partners (or repurposing of existing treatment rooms)
- ▶ **Enhanced provision for children and young people** – e.g. soft play and / or climbing, potentially in the café area or Rochford Suite

Rayleigh Leisure Centre

- ▶ **Additional flexible space / studio provision** – which supports development of the core group exercise programme but can also be used flexibly by community groups / health partners, particularly during quieter daytime periods. Potentially through repurposing of existing creche area or squash courts
- ▶ **Enhanced provision for children and young people** – e.g. soft play and / or climbing, potentially in the café area
- ▶ **Repurposing of existing astro pitches** – e.g. padel tennis courts / refurbishment with 3G surface / or covered outdoor exercise area

2. Introduction

2.1 Background

- 2.1.1 Rochford District Council (RDC) and Brentwood Borough Council (BBC) have decided to jointly procure a new leisure operating contract to replace their individual existing contracts which both end on 31st March 2025.
- 2.1.2 The Councils have commissioned The Sport, Leisure and Culture Consultancy (SLC) to provide consultancy support throughout the procurement of the new contract. As part of the pre-procurement phase of that process, SLC is working with the Councils to identify investment opportunities for their core leisure facilities. The purpose of this work is to identify potential investments which would:
- ▶ enhance the appeal of the contract opportunity within the leisure operator market
 - ▶ improve the financial performance of the new contract
 - ▶ deliver enhanced facilities and services to local residents which diversify the offer and better meet need.
- 2.1.3 Undertaking this work in advance of a procurement enables the Councils to test the business case for identified investments through the procurement process. Including investment within the procurement also provides an opportunity to improve the overall financial and non-financial outcomes that can be achieved through the new contract.
- 2.1.4 In order to identify potential investment opportunities to be tested with the market as part of a procurement, SLC has undertaken an initial assessment of need. This will inform a decision from the Councils on the preferred options to be progressed to a further stage of design, costing and business planning.
- 2.1.5 The Hartswood Pavilion and adventure playground / splashpad facilities at King George Playing Fields are relatively new. The feasibility work therefore focuses on Clements Hall LC and Rayleigh Leisure LC in Rochford District and The Brentwood Centre in Brentwood.
- 2.1.6 It has been agreed with the Council that investment options will be limited to enhancements / improvements to the existing facilities with a lifespan parallel with that of the new contract. This would therefore exclude any larger-scale, longer-term investments, e.g. significant extensions or wholesale remodelling / redevelopment of facilities.
- 2.1.7 This briefing paper sets out the findings and recommendations of the needs assessment work undertaken to date. It brings together a number of areas of work undertaken to understand community need and market potential including:
- ▶ A review of core documents including condition surveys, previous feasibility studies and strategic planning documents (e.g. Indoor Built Facility Strategies).
 - ▶ Market assessments considering the likely levels of demand generated by the catchment population against existing and enhanced facilities based on live activity data at a national level and participation survey data
 - ▶ Engagement with key internal and external stakeholders in Rochford District and Brentwood, identified through discussion with the Council
 - ▶ Public engagement with leisure facility users and the wider general public through an online survey
- 2.1.8 This briefing paper provides officers with information to support a meeting on 21st November where the emerging investment areas will be discussed and agreed.

3. Feedback from stakeholder and public engagement

3.1 Stakeholder engagement

3.1.1 SLC has undertaken a series of virtual meetings with key stakeholders and organisations identified in consultation with RDC and BBC. The stakeholder engagement meetings were framed around a series of ‘key lines of enquiry’ which were adapted to the specific areas of interest and expertise of each stakeholder / organisation.

3.1.2 A list of the stakeholders is provided in Table 2.

Table 1: Stakeholder consultees

Organisation	Name	Role
Active Essex	Lee Monk	Relationship Manager, South East Essex
	Juliette Raison	Relationship Manager - South West Essex
	Jason Fergus	Director of Active Essex
	Stuart Tryhorn	Assistant Relationship Manager – South West Essex
Fusion Lifestyle	Jon Richardson	Regional Commercial and Operations Manager
	Dan Denniss	General Manager, Clements Hall Leisure Centre
	Colette Harker	General Manager, Rayleigh Leisure Centre
	Steve Bentall	Sports and Community Development Manager (Essex)
Rayleigh Indoor Bowls Club	Brian Ashton and Janet Ashton	Club Captains
Forget Me Not Caring – Care for adults with learning disabilities & additional needs	Claire Buckland	Day Centre Manager

Organisation	Name	Role
Brentwood Borough Council and Rochford District Council	Henry Muss	Climate & Sustainability Manager
Rochford District Council and Castle Point Borough Council	Lucy Terkelsen	Public Health Improvement Officer
Rochford District Council	Cllr Julie Gooding	Lead Member for Leisure, Tourism & Wellbeing
Active Brentwood	Jo Cory	Corporate Health and Well-being Officer
Essex FA	Nick Emery	Head of Development and Investment
Everyone Active	Duncan Jefford	Regional Director
	Duncan Cogger	Regional Manager
	Shaun Beagle	Area Contract Manager
Sport For Confidence	Kimberley Dutton	Senior Occupational Therapist
BOSP	Jodie Connelly	Chief Executive Officer
Wheelchair Rugby	Anthony Sherwood	Chairman
CVS	Diane Fairchild	Director
SEE Alliance	Hemant Patel	Clinical Lead for the SEE Alliance
Brentwood and Basildon Alliance	Emma Branch	Alliance Transformation and Engagement Manager
	Alison Foster	Alliance Delivery Lead
	James Wheeler	Alliance Delivery Lead

3.1.3 The key themes emerging from the stakeholder engagement in relation to the facilities and opportunities for investment include:

- **Refresh/refurbishment of facilities:** Investment is required to core facilities across all three centres but particularly Clements Hall LC and The Brentwood Centre. A general uplift and refurbishment of core areas will likely increase the overall usage and attractiveness of the centres. Linked to this, there is an opportunity to improve the layout and customer journey of the centres and better utilise key spaces, e.g. café areas. Specific areas for refurbishment that stakeholders identified include:

- ▶ The Brentwood Centre: the gym requires a refurbishment, including an improved layout. Ancillary facilities, particularly to the events hall require investment. Many areas are tired and in need of a general refresh
- ▶ Clements Hall LC: the pool hall and wet changing areas are a priority for investment. The current poor quality of wetside provision limits the site's ability to attract market share for swimming lessons and general casual swimming.
- ▶ **Accessibility:** Many stakeholders commented that accessibility at all three centres is a major barrier for those that are disabled or have complex needs. Specific areas of concern include gym access, pool facilities including pool accessibility and accessible changing areas.

Due to the centres' limitations, groups are travelling to alternative facilities outside of the Rochford District. The leisure centres should provide facilities and activities that are 'dementia / autism / disability friendly' through suitable adaptations, signage and training for staff. The development of 'safe spaces', e.g. sensory room, was suggested.
- ▶ **Alternative gym space:** The gym spaces could include a dedicated and separate zone, linked to the main gym, but with specialist accessible equipment for those less active and with a different 'look and feel'. This would act as a good way of introducing new, less able or less confident users to the facilities and provide a pathway from specialist, targeted sessions through to mainstream gym and classes. This space could have its own associated membership, with programmed sessions for specific user groups.
- ▶ **Flexible space:** There is a need for an increase in flexible space, including studios and meeting rooms. This would accommodate the high demand for exercise programmes, particularly at The Brentwood Centre but also provide space for community groups and health partners. There is a desire from key stakeholders, e.g. Sport for Confidence, Forget Me Not Caring, Brentwood and Basildon Alliance etc., for flexible space at the centres to facilitate programmed classes, workshops and consultations.
- ▶ **Community Health Hub:** There is an opportunity to work with health partners and Active Essex in developing a wider 'community health hub' offer at the leisure centres through the provision of dedicated spaces that support health and wellbeing and lifestyle programmes. These could include GP Referral Schemes, weight management, rehabilitation and targeted sessions for those less active.
- ▶ **Diversified offer:** There is an opportunity to diversify the offer through the provision of new, less traditional forms of activity, such as soft play and climbing.
- ▶ **Outdoor Space:** There is a significant amount of under-utilised space at the centres. These areas could be developed to provide other activities such as Padel Tennis and bootcamp fitness sessions. The development of walking and cycling routes, particularly at The Brentwood Centre considering the outdoor space, was suggested by stakeholders, this could be linked community running/walking groups in the area.

3.2 Current operator engagement

- 3.2.1 Engagement with the current operators of the Councils' leisure facilities (Everyone Active – BBC, Fusion Lifestyle – RDC) was undertaken to get their views on potential investment opportunities based on their experience of operating the sites and perceived areas of potential growth.
- 3.2.2 Key areas highlighted by the operators are summarised as follows:

Everyone Active – The Brentwood Centre

- ▶ Events are limited by ancillary facilities – improvements to toilets and changing rooms and a secondary bar / seating area would enhance the events offer

- ▶ Strong potential for higher levels of health and fitness membership, given low levels of competition in the area – this would require improved and additional gym space to accommodate a higher volume of users
- ▶ Additional studio space – a programme of c. 80 classes is currently delivered out of 4 areas, some of which are not purpose-built or retrofitted into sub-optimal spaces (e.g. 2 badminton courts within the sports hall when not needed for events).
- ▶ Refresh of pool areas including wetside changing – strong potential to grow swimming programme which would be enhanced by an improvement to look and feel of these facilities
- ▶ Inclusion of a spa facility – would support and enhance the membership offer

Fusion – Clements Hall LC

- ▶ Investment in the wetside is seen as the priority – improvements to the pool hall, changing village and sauna / steam facilities
- ▶ Existing studio space is seen as being sufficient to meet current demand for exercise classes although some classes take place in Rochford Suite which is not purpose-built
- ▶ Opportunity to develop soft play and/or climbing to enhance the offer and support the café (currently a large space that could do more)
- ▶ The creche is making a loss and could be repurposed for an alternative use, potentially linked to a wider 'health and community hub' offer
- ▶ Consultation spaces to accommodate health practitioners e.g. for health checks, community nurse drop ins, social prescribing etc. could be provided
- ▶ Accessibility across the site could be improved

Fusion Lifestyles – Rayleigh LC

- ▶ The creche is making a loss and could be repurposed for an alternative use, potentially as a spin studio
- ▶ Café space could be reconfigured to create space for soft play with a servery added into reception
- ▶ There is currently only 1 small studio – additional space would enhance the offer
- ▶ Outdoor astro pitches are not well used and could be repurposed – padel tennis could be a suitable option for this space or refurbished with 3G surface
- ▶ The centre has very limited storage space which could create limitations on future options.

3.3 Public engagement

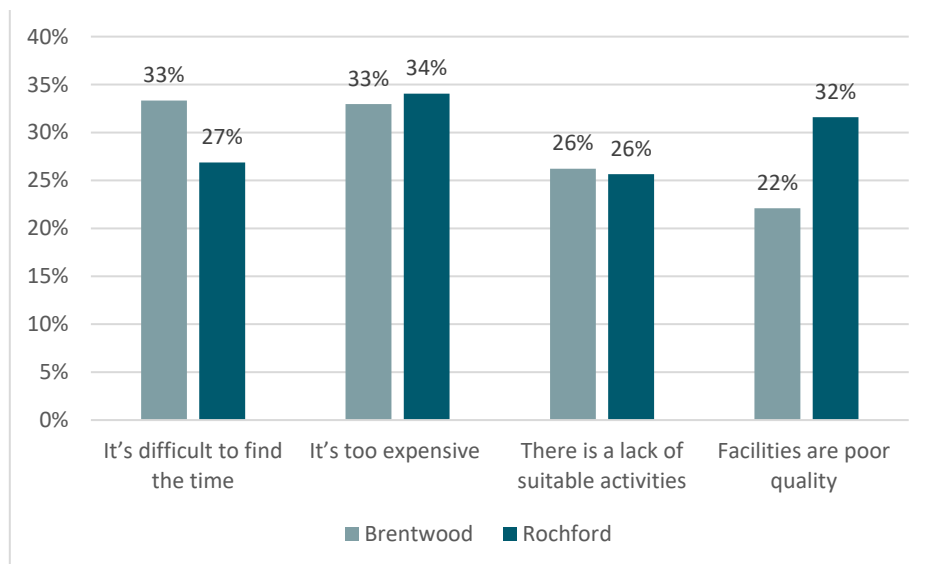
- 3.3.1 In parallel to the consultation with stakeholders, engagement with leisure facility users and the wider general public has been undertaken. This has been delivered through an online questionnaire, hosted on the Councils' Engagement HQ platform. Hard copy questionnaires were also available.
- 3.3.2 The survey was live for 4 weeks from Friday 13th October to 10th November. It was promoted through the Councils' social media channels and distributed by the leisure operators to their mailing lists in Rochford District and Brentwood respectively.
- 3.3.3 Key themes that have emerged from the results revolve around the need for **accessible, affordable and diverse opportunities to be physically active**.
- 3.3.4 Priorities for investment informed by responses include recreational swimming, health and fitness gyms, group exercise classes and indoor sports. There is an overall need to provide better quality facilities that cater for a more diverse audience, particularly those less active.

3.3.5 Residents from Brentwood think the Council should prioritise **more locally based activities** (e.g. in parks, community centres, village halls etc.). Residents in Rochford District felt that the top priority for the Council was to provide **better-quality facilities** that are more **accessible**.

3.3.6 Key findings from the public engagement were as follows:

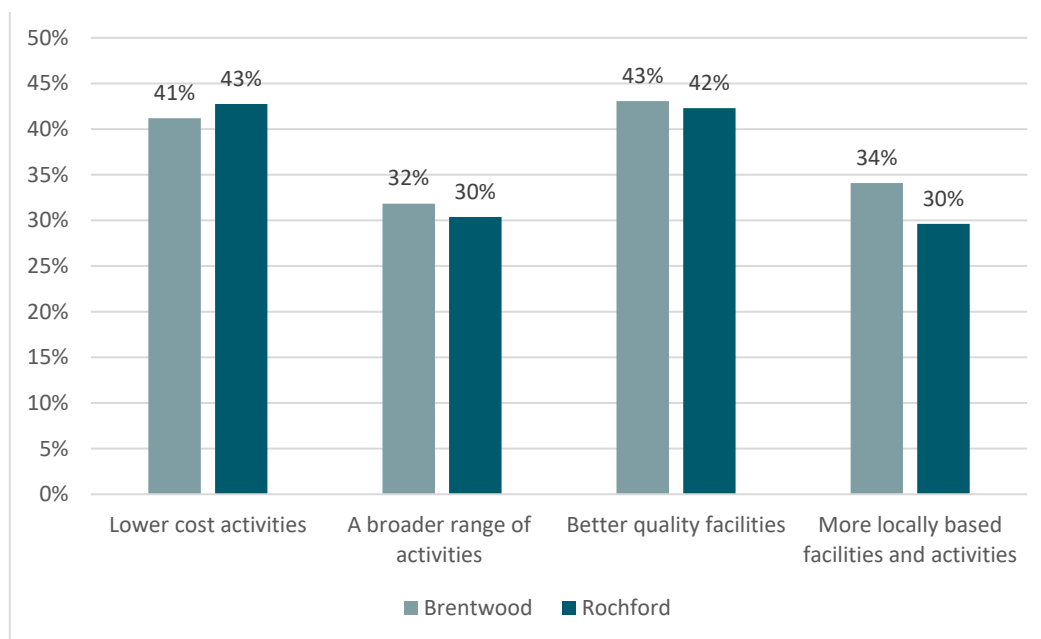
- ▶ 267 submissions were received from Brentwood and 655 from Rochford
- ▶ 28% of Brentwood and 27% of Rochford responses were received from residents that don't currently use the Council's facilities
- ▶ **81% of Rochford residents and 80% of Brentwood residents want to be more physically active**
- ▶ The four main barriers to being more physically active are:
 - ▶ It's difficult to find the time
 - ▶ It's too expensive
 - ▶ There is a lack of suitable activities
 - ▶ Facilities are poor quality

Figure 1: RDC/BBC Main Challenges to being more physically active



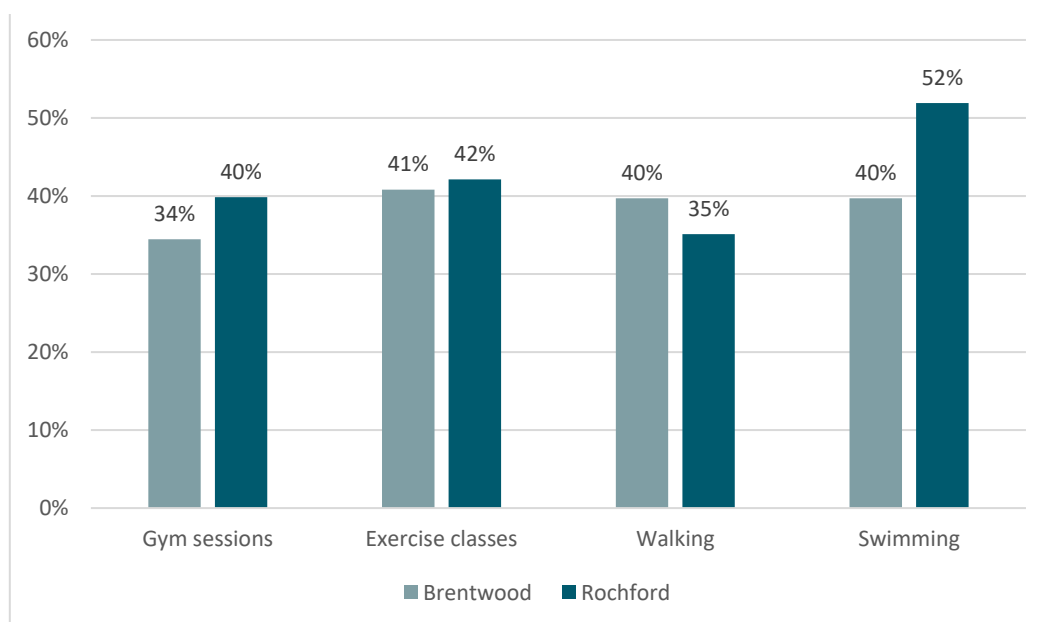
- ▶ The main things that would help participants become more physically active are:
 - ▶ Lower cost activities
 - ▶ Better quality facilities
 - ▶ More locally based facilities and activities
 - ▶ Broader range of activities

Figure 2: RDC/BBC Main things to help participants become more physically active



- ▶ Activities that people would like to participate in to increase levels of physical activity are:
 - ▶ Swimming
 - ▶ Exercise classes
 - ▶ Gym sessions
 - ▶ Walking

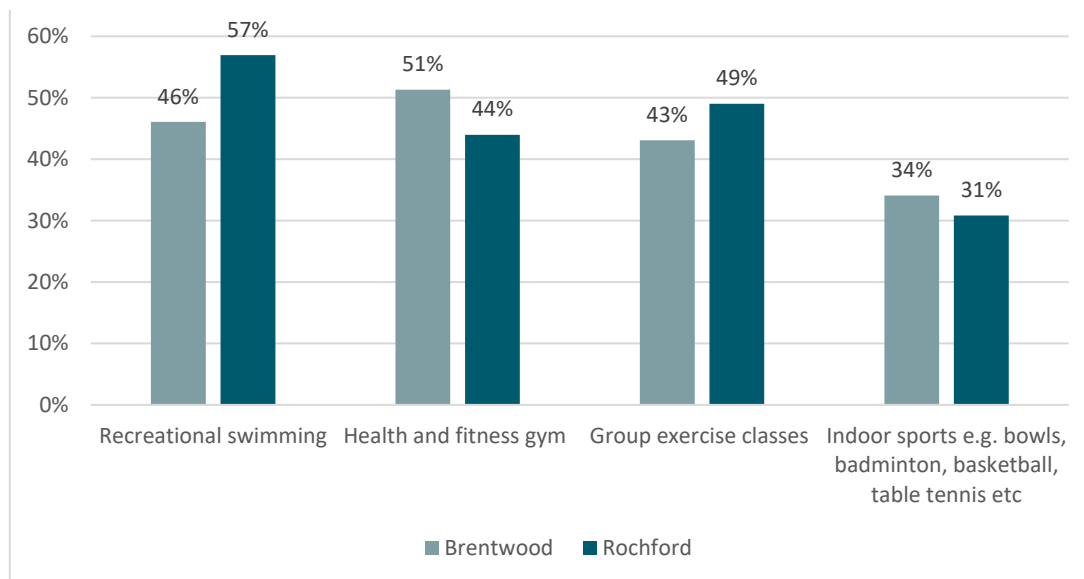
Figure 3: RDC/BBC Activities that people would like to participate in



- ▶ Activities and facilities that the Council should prioritise when exploring investment options for the leisure centres:
 - ▶ Recreational swimming
 - ▶ Health and fitness gym
 - ▶ Group exercises

- ▶ Indoor sports e.g. bowls, badminton, basketball, table tennis etc.

Figure 4: RDC/BBC Investment priorities



- ▶ Respondents identified that the Council’s priorities in supporting local people to become more active should be:

Rochford residents:

- ▶ To support the provision of better-quality facilities that are more accessible (56%)
- ▶ To help increase awareness of what activities and facilities are available (40%)
- ▶ To focus resources on encouraging inactive or less active residents to be more active (38%)

Brentwood residents:

- ▶ To support more opportunities for residents to be active in local places such as parks, community centres and village halls (53%)
- ▶ To support the provision of better-quality facilities that are more accessible (44%)
- ▶ To help increase awareness of what activities and facilities are available (42%)

4. Market assessments

4.1.1 SLC commissioned data-led market assessments from 4global and Swim England to inform this initial feasibility review. Assessments have been undertaken for Clements Hall Leisure Centre, Rayleigh Leisure Centre and The Brentwood Centre based on current population levels and on planned housing growth up to 2030. The key findings are set out within this section.

4.2 4global site market assessment findings

4.2.1 4global's facility assessment modelling assesses market demand for facilities and development scenarios using their DataHub platform which brings together live usage data from operators from across thousands of facilities nationally.

4.2.2 The modelling provides an indication of the likely level of demand that a facility or facility development in a specific location would be expected to satisfy, taking into account the facility's own level of attractiveness, competing provision and the demographics of the catchment area.

4.2.3 Projected usage levels at each of the facilities have been modelled by 4global to provide an indication of the likely level of use that the facilities would attract with specific enhancements in provision.

4.2.4 The key factors taken into account by the modelling include:

- ▶ Size of facility
- ▶ Age of facility and refurbishment
- ▶ Location of the facility in terms of its proximity to potential users
- ▶ Attractiveness of competing facilities in the area, primarily based on size and age
- ▶ Location of competing facilities in terms of proximity to potential users
- ▶ Demographics of the catchment population and the likely level of demand it will generate.

4.2.5 The resulting assessment models provides an expected level of usage at a given facility or planned facility by assigning identified demand from across the catchment population to the facility which is most likely to benefit from that demand based on its location and attractiveness.

4.2.6 Climbing and soft play facilities have been added to the modelling to provide an indication of the likely level of demand for these facility types if added.

Clements Hall LC

4.2.7 4global's demand modelling has been used to test the market potential and likely impact of a number of facility enhancements at Clements Hall Leisure Centre, including:

- ▶ Refurbished and enhanced health and fitness gym facilities including the addition of more fitness stations
- ▶ Additional studio provision
- ▶ Additional full size 3G pitch provision (as planned with the Football Foundation) and resurfacing of existing 3G pitch
- ▶ Addition of spa provision (sauna, steam room, relaxation area etc.)
- ▶ Addition of soft play provision
- ▶ Addition of climbing facility

4.2.8 Expected levels of usage for existing swimming, squash and sports hall facilities at the centre have also been modelled.

- 4.2.9 The 4global modelling suggests that a refurbishment of the existing 62-station gym would attract c. 1,572 visits per week and 1,391 unique users per month. This represents a performance in the top 50% of sites in the sector in terms of visits per station.
- 4.2.10 An expanded and refurbished gym with 100 stations would attract c. 2,145 visits per week and 1,898 unique users per month. A further expanded gym facility with 150 stations would attract a projected 2,554 visits per week (2,263 unique users per month).
- 4.2.11 4global modelling projects a total future health and fitness membership based on a refurbished 62-station gym of 3,325. This equates to 53 members per station which is extremely high and could therefore justify a larger gym.
- 4.2.12 Whilst each increased gym size provides additional visits per week and unique users per month, these increases are not proportionate to the increase in gym size. There are ‘diminishing returns’ on each increase i.e. the limitations of local demand mean that it’s not simply a case of doubling the size of the gym in order to double its use.
- 4.2.13 Provision of an additional 150 sqm studio is projected to increase visits per week compared with existing studio provision from 1,692 visits per week to 2,654 visits. Provision of an additional two 150 sqm studios would increase total studio visits per week to 3,033.
- 4.2.14 In contrast to the increased sizes of gyms, the increases in studio space does, broadly, result in a corresponding increases in usage levels.
- 4.2.15 New spa facilities are projected to attract an additional 135 visits per week.
- 4.2.16 A standard sized soft play facility (c. 200 sqm) would attract c. 212 visits per week, whilst a larger installation of c. 400 sqm is projected to attract c. 475 visits per week to the centre.
- 4.2.17 A standard sized climbing facility (c. 135 sqm) is projected to attract c. 150 visits per week, increasing to 179 visits for a larger facility (c. 150 sqm).
- 4.2.18 Projected levels of usage for the existing swimming pool, squash courts and sport hall are shown in Table 2.

Table 2: Projected use of existing facilities - CHLC

Facility	Projected weekly visits (current population)	Projected use against sector benchmarks
Swimming	2,480 visits	Top 50%
Sports hall	674 visits	Top 50%
Squash courts	88 visits	Bottom 25%

- 4.2.19 Modelling for these facility enhancements and existing facilities has also been undertaken taking into account planned housing growth. Future projected levels of use are shown in Table 3.

Table 3: Projected future use - CHLC

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Health and Fitness		

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Existing size – refurbished (62 stations)	1,732	10.2%
100 stations	2,364	10.2%
150 stations	2,815	10.2%
Studios		
Existing (564 sqm)	1,887	11.5%
Plus additional 150 sqm studio	2,959	11.5%
Plus 2 additional 150 sqm studios	3,382	11.5%
Artificial grass pitch		
Existing plus new full size pitch	464	11.8%
Soft play		
Standard size (200 sqm)	238	12.1%
Larger size (400 sqm)	532	12.1%
Climbing		
Standard size (135 sqm)	168	12.0%
Larger size (150 sqm)	200	12.0%
Spa		
Sauna/Steam/Relaxation area	151	11.9%
Existing		
Swimming (existing)	2,793	12.6%
Sports hall (existing)	768	14.0%
Squash courts (existing)	99	12.2%

Rayleigh Leisure Centre

4.2.20 4global's demand modelling has been used to test the market potential and likely impact of a number of facility enhancements at Rayleigh Leisure Centre, including:

- ▶ Additional studio provision

- ▶ New full size 3G pitch provision (as planned with the Football Foundation) and conversion of existing outdoor courts to five-a-side 3G pitches
- ▶ Addition of soft play provision
- ▶ Addition of climbing facility

- 4.2.21 Expected levels of usage for existing health and fitness, squash, bowls, outdoor courts and sports hall facilities at the centre have also been modelled.
- 4.2.22 Provision of an additional 60 sqm spin studio is projected to increase studio visits per week to 1165 visits. Provision of an additional 120 sqm studio is projected to increase visits to 1304 visits, compared with existing studio provision projected at 664 visits per week. Provision of both additional studios (180 sqm) would increase total studio visits per week to 1414.
- 4.2.23 A new full size artificial pitch at the centre is projected to attract c. 480 visits per week. If the existing outdoor courts are converted to five-a-side 3G pitches, the total projected 3G pitch use is increased to 689 visits per week.
- 4.2.24 A standard sized soft play facility (c. 200 sqm) would attract c. 369 visits per week, whilst a larger installation of c. 400 sqm is projected to attract c. 902 visits per week.
- 4.2.25 A standard sized climbing facility (c. 135 sqm) is projected to attract c. 176 visits per week, increasing to 199 visits for a larger facility (c. 150 sqm).
- 4.2.26 Projected levels of usage for the existing health and fitness, squash, bowls, outdoor courts and sports hall facilities at the centre are shown in Table 4.

Table 4: Projected use of existing facilities - RLC

Facility	Projected weekly visits (current population)	Projected use against sector benchmarks
Gym	891	Just below average
Sports hall	543	Top 50%
Squash courts	113	Just below average
Indoor bowls	81	n/a
Outdoor courts (tennis)	252	n/a

- 4.2.27 Modelling for the potential facility enhancements and existing facilities has also been undertaken taking into account planned housing growth. Future projected levels of use are shown in Table 5.

Table 5: Projected future use - RLC

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Studios		
Existing	850	28.0%

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Plus additional 60 sqm spin studio	1,491	28.0%
Plus additional 120 sqm studio	1,669	28.0%
Plus both additional studios	1,810	28.0%
Artificial grass pitch		
New full size pitch	590	22.9%
New full size pitch plus conversion of existing outdoor courts to 3G 5AS	847	22.9%
Soft play		
Standard size (200 sqm)	454	22.9%
Larger size (400 sqm)	1,108	22.9%
Climbing		
Standard size (135 sqm)	216	22.9%
Larger size (150 sqm)	245	22.9%
Existing		
Health and fitness (existing)	1,166	30.4%
Sports hall (existing)	654	20.4%
Squash courts (existing)	127	12.7%
Indoor bowls (existing)	100	22.9%
Outdoor courts (existing)	310	22.9%

The Brentwood Centre

4.2.28 4global's demand modelling has been used to test the market potential and likely impact of a number of facility enhancements at The Brentwood Centre, including:

- ▶ Refurbished and enhanced health and fitness gym facilities including the addition of more fitness stations
- ▶ Additional studio provision
- ▶ Additional full size 3G pitch provision (as planned with the Football Foundation)
- ▶ Addition of spa provision (sauna, steam room, relaxation area etc.)
- ▶ Addition of soft play provision

► Addition of climbing facility

- 4.2.29 Expected levels of usage for existing swimming, squash and sports hall facilities at the centre have also been modelled.
- 4.2.30 The 4global modelling suggests that a refurbishment of the existing gym would attract c. 2,085 visits per week and 1,855 unique users per month. This represents a performance in the top 50% of sites in the sector in terms of visits per station (32.1 visits).
- 4.2.31 An expanded and refurbished gym with 100 stations would attract c. 2,721 visits per week and 2,421 unique users per month. The performance of the extended gym provision is still projected to be in the top 50% of sites in the sector albeit with a reduced number of visits per station overall (27.2 compared with 32.1 visits). At 150 stations, projected visits per week would increase to 3,404 (3,029 unique users per month) and 22.7 visits per station.
- 4.2.32 4global modelling projects a total future health and fitness membership based on a refurbished 100-station gym of 3,443. This equates to 34 members per station which is at the high end of sector benchmarks and could justify a larger gym.
- 4.2.33 As with Clements Hall, there are ‘diminishing returns’ on each increase in gym size. However, the larger options move the level of use further below the ‘comfort threshold’ providing a better quality user experience and critically, providing more room for future growth.
- 4.2.34 Provision of an additional 150 sqm studio is projected to increase visits per week from 1,203 based on current levels of provision to 1,954. Provision of an additional two 150 sqm studios would increase total studio visits per week to 2,217. Provision of an additional two 150 sqm studios plus an additional 60 sqm spin studio is projected to increase total studio visits per week to 2,400.
- 4.2.35 All 4 options perform around the same 50% benchmark (4.8 visits per sqm) compared with other sites in the sector. Existing provision and the one additional studio both perform slightly above the benchmark with 5.1 visits per sqm. The option with two additional studios brings this down slightly to 4.7 visits per sqm and with the addition of a spin studio to 4.5 visits per sqm.
- 4.2.36 New spa facilities are projected to attract an additional 343 visits per week.
- 4.2.37 A standard sized soft play facility (c. 200 sqm) would attract c. 387 visits per week, whilst a larger installation of c. 400 sqm is projected to attract 544 visits per week to the centre.
- 4.2.38 A standard sized climbing facility (c. 135 sqm) is projected to attract c. 265 visits per week, increasing to 336 visits for a larger facility (c. 150 sqm).
- 4.2.39 Two new full size 3G artificial turf pitches at the centre alongside the existing pitch are projected to attract c. 984 additional visits per week.
- 4.2.40 Projected levels of usage for the existing swimming pool, squash courts and sport hall are shown in Table 6.

Table 6: Projected use of existing facilities – The Brentwood Centre

Facility	Projected weekly visits (current population)	Projected use against sector benchmarks
Swimming	2,777 visits	Top 25%
Sports hall (sports usage only – excluding events estimated at c. 90 days a year)	1,112 visits	Top 50%

Facility	Projected weekly visits (current population)	Projected use against sector benchmarks
Squash courts	126 visits	Top 50%

4.2.41 Modelling for these facility enhancements and existing facilities has also been undertaken taking into account planned housing growth. Future projected levels of use are shown in Table 7.

Table 7: Projected future use – The Brentwood Centre

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Health and Fitness		
Existing size – refurbished (65 stations)	2,198	5.4%
100 stations	2,868	5.4%
150 stations	3,588	5.4%
Studios		
Existing (236 sqm)	1,257	5.3%
Plus additional 150 sqm studio	2,508	5.3%
Plus 2 additional 150 sqm studios	2,335	5.3%
Plus 2 additional 150 studio and 60 sqm spin studio	2,527	5.3%
Artificial grass pitch		
Existing plus new 2 full size pitches	1,020	3.7%
Soft play		
Standard size (200 sqm)	408	5.5%
Larger size (400 sqm)	574	5.5%
Climbing		
Standard size (135 sqm)	280	5.5%
Larger size (150 sqm)	354	5.5%
Spa		

Facility type	Future projected weekly visits (2030)	Expected growth vs current population projections
Sauna/Steam/Relaxation area	362	5.6%
Existing		
Swimming (existing)	2,930	5.5%
Sports hall (existing)	1,187	6.7%
Squash courts (existing)	135	6.8%

4.3 Swim England Swimming Lesson Latent Demand

4.3.1 SLC has used analysis from Swim England to understand the level of latent (i.e. unmet) demand within the catchment of each centre (Clements Hall and The Brentwood Centre) based on the propensity of the catchment population (current and future) to participate in swimming lessons, taking into account existing levels of provision in the area.

Clements Hall LC

4.3.2 Swim England has reported that there is latent demand of **3,267 swimming lesson pupils** in the catchment area around Clements Hall LC currently, increasing to **3,302** by 2030. The current learn to swim programme at the centre has a total of 637 pupils. The identified latent demand has been calculated based on reviewing the following considerations:

- ▶ Catchment area - 10-15 minute drive time from the centre
- ▶ Water space analysis
- ▶ Competitor analysis
- ▶ Catchment population and Swim England Insight on 'likelihood measures' – i.e. market research on the likelihood of different demographic groups to pay for a swimming lesson

4.3.3 Swim England report that, a realistic and achievable share of this latent demand, based on the overall proportion of total water space within the catchment is c. **494 additional pupils** (rising to **499** in 2030).

4.3.4 This unmet demand analysis indicates that Clements Hall LC could attract c. 500 additional swim school pupils – equivalent to c. **£198K pa** additional annual revenue based on current pricing. The centre could potentially claim a greater proportion of the significant identified latent demand within the catchment (over 3,000 pupils) with an improved quality of offer and increase revenue further still.

The Brentwood Centre

4.3.5 Swim England has reported that there is latent demand of **2,484 swimming lesson pupils** in the catchment area around Brentwood Centre currently, increasing to **2,877** by 2030. The current learn to swim programme at the centre has a total of 1,148 pupils. The identified latent demand has been calculated based on reviewing the following considerations:

- ▶ Catchment area - 10-15 minute drive time from the centre
- ▶ Water space analysis
- ▶ Competitor analysis

- ▶ Catchment population and Swim England Insight on 'likelihood measures' – i.e. market research on the likelihood of different demographic groups to pay for a swimming lesson

4.3.6 Swim England report that, a realistic and achievable share of this latent demand, based on the overall proportion of total water space within the catchment is c. **331 additional pupils** (rising to **384** in 2030).

4.3.7 This unmet demand analysis indicates that The Brentwood Centre could attract c. 400 additional swim school pupils – equivalent to c. **£144K pa** additional annual revenue based on current pricing. The centre could potentially claim a greater proportion of the significant identified latent demand within the catchment (c. 2,500 pupils) with an improved quality of offer and increase revenue further still.

5. Recent performance trends

- 5.1.1 All leisure facilities experienced a period of significant disruption during and in the aftermath of Covid-19 which resulted in the loss of many of their members and a period of recovery following the full reopening of facilities and services.
- 5.1.2 Some facilities have recovered more quickly and more fully than others. A review of usage and financial data can provide an indication of the extent to which facilities in Rochford District and Brentwood have recovered. Any recent trends in participation and income could also provide an indication of further growth potential.

5.2 Recent membership and usage trends

- 5.2.1 Recent (July 2023) membership, swim school and throughput data for Clements Hall LC and Rayleigh LC has been compared with pre-Covid levels and with the same month a year ago to assess recovery levels and recent growth trends.
- 5.2.2 In the case of The Brentwood Centre, as the current operator has only been in place since October 2021, pre-Covid data is not available for comparison, but membership, swim school and throughput data in October 2021 and September 2022 have been compared with current levels.
- 5.2.3 A similar comparison has not been undertaken for Hartswood Pavilion as it only opened in April 2022.

Table 8: Clements Hall LC – membership and usage trends

	Pre-Covid (2019-20 average)	July 2022	Current – July 2023	Recovery – Current vs pre-Covid	Growth – Current vs July 22
Members	3,114	2,554	3,227	104%	26%
Swim school	676	614	637	94%	4%
Total monthly visits	47,345	27,553	29,359	62%	7%

Table 9: Rayleigh Leisure Centre - membership and usage trends

	Pre-Covid (2019-20 average)	July 2022	Current – July 2023	Recovery – Current vs pre-Covid	Growth – Current vs July 22
Members	1,125	767	1,152	102%	50%
Total monthly visits	11,326	6,057	8,980	79%	48%

Table 10: Brentwood Centre - membership and usage trends

	October 2021	September 2022	Current - Sept 2023	Growth – Current vs Oct 21	Growth – Current vs Sept 22
Members	1,512	2,705	3,057	102%	13%
Swim school	761	993	1,143	50%	15%
Total monthly visits	24,205	31,044	34,463	42%	11%

5.3 Trends in income performance

- 5.3.1 Income levels in 2022/23 at Clements Hall LC and Rayleigh LC have been compared with pre-Covid income levels. Both facilities have generated significantly lower levels of income in the last full financial year than in 2019/20 (22% and 24% less respectively). This is despite memberships exceeding pre-Covid levels, although throughput levels are down.
- 5.3.2 This suggests that Fusion are achieving lower yields through their membership sales which is driving higher numbers but significantly less income. There may be scope to increase prices and drive higher membership numbers with an improved overall offer.
- 5.3.3 Swimming income has not recovered to pre-Covid levels, despite this generally being an area which has typically fully recovered across the wider market. As illustrated by the Swim England assessment, there is significant scope to increase swimming lesson programme numbers in particular, which would drive significant levels of additional income.

Table 11: Clements Hall LC - income trends

	2019/2020	2022/23	% recovery
Total Income	£2,263,926	£1,755,897	78%
Health and fitness	£1,371,867	£1,014,981	74%
Total swimming	£474,326	£458,724	97%
Indoor, outdoor and junior activities	£224,244	£164,067	73%

Table 12: Rayleigh LC - income trends

	2019/2020	2022/23	% recovery
Total Income	£665,263	£503,313	76%

	2019/2020	2022/23	% recovery
Health and fitness	£523,617	£359,096	69%
Indoor, outdoor and junior activities	£122,325	£127,382	104%

5.3.4 Income levels at The Brentwood Centre from April – August 2022 have been compared with the same period in 2023. The comparison shows a consistent growth across all key income areas which reflect and exceed the steady growth in membership, swim school and usage numbers. This reflects the operator’s view that there is further potential for growth at the facility.

Table 13: Brentwood Centre - income trends

	April – August 2022	April – August 2023	% growth
Total Income	£667,889	£851,587	28%
Aquatics	£192,314	£231,453	20%
Fitness	£321,950	£389,012	21%
Indoor Sports & Operations	£119,407	£155,985	31%