# EXECUTIVE SUMMARY

## 1.1 Context of Study

1.1.1 WYG Planning & Environment (WYG) was commissioned by Luton Borough Council in December 2014 to undertake the Luton Leisure Study (July 2015) (the "Study"). The Study provides part of the Council's evidence base to assist in the formulation of future development plan policy. The Study also provides baseline information to assist in the determination of planning applications for leisure development.

1.1.2 The Study investigates the commercial leisure patterns for the following facility types: Cinema; Theatre/Concert Halls; Ten Pin Bowling; Bingo; Health & Fitness; Swimming Pools; Restaurants/Cafes; Pubs/Clubs; Museum/ Galleries; and Casinos.

## 1.2 Leisure expenditure

1.2.1 The Study finds that all categories of commercial leisure display strong levels of personal expenditure growth over the plan period (between 2015 to 2031) as set out below:

- Accommodation services: from £50.2m to £71.3m (£21.1m);
- Cultural services: from £123.4m to £175.2m (£51.8m);
- Games of chance: from £59.7m to £92.8m (£33.1m);
- Hairdressing and personal grooming: from £37.2m to £52.9m (£15.7m);
- Recreation and sporting activities: from £46.2m to £64.7m (£18.5m); and
- Restaurants and cafes: from £360.6m to £512.8m (£152.3m).

1.2.2 Current spending on restaurants and cafes accounts for the highest proportion of leisure spending in the Study Area. In total, 57% of total spending will be disbursed on 'restaurants and cafes', ahead of 'cultural services' (16%), 'games of chance' (8%), 'accommodation' and 'recreation and sporting activities' (7%).

## 1.3 Leisure patterns and future need

1.3.1 During January/February 2015 a household telephone survey of c.1,000 households was undertaken[1] within the defined Study Area to identify leisure participation rates, consumer patterns and the market share[2] of existing leisure facilities.

[1] NEMS Market Research
[2] Proportion of trips

1.3.2 The Study identified the following broad patterns of usage and need for each leisure category:

1.3.3 **Cinema** - Cinema expenditure growth is anticipated to total up to £3m over the course of the plan period to 2031. Luton is primarily served by the Cineworld at the Galaxy Centre which is the most popular destination in the Study Area. The main competing facilities are the multi-screen Cineworld's at Stevenage and Milton Keynes. In terms of cinema participation rate, just over half of the Study Area population undertake cinema visit.

1.3.4 Nationally, there has been a reduction in cinema participation in favour of home cinema etc in recent years. Luton's existing provision of c.12 screens is considered to satisfy current benchmark need (7-8 screens). A theoretical capacity of c.15-18 screens is identified to meet total Study Area need to 2031, based on current participation rates.

1.3.5 **Theatre/Concert Halls** – Expenditure is anticipated to grow from £13m to £19m over the plan period. The Study finds less than half of the population undertake theatre visits. Study Area based facilities retain a 30% market share. Luton is served by two main facilities, the Library Theatre at St George's Square, and the Hat Factory at Bute Street. The Grove theatre in Dunstable is the most popular study area based facility. There is significant 'leakage' of theatre/concert visits to Milton Keynes and central London/West End.

1.3.6 Luton is also being out-competed to some degree by facilities in Dunstable (Grove Theatre) and popular destinations further afield e.g. Milton Keynes and London.

1.3.7 The Study identifies potential qualitative need for improved theatre/concert facilities in Luton, given the relatively limited choice and range of local facilities on offer. A key aim should be to enhance local provision and counteract leakage to competing destinations.

1.3.8 **Ten-Pin Bowling** – The survey identifies a low participation rate (22%) but relatively healthy market share retention within the Study Area. The Study Area is dominated by two main facilities; MFA Bowl at the Galaxy Centre, Luton and Go Bowling, Dunstable. The most popular facility is Go Bowling in Dunstable.

1.3.9 Existing provision is considered sufficient to meet future needs given the identified surplus of lanes and low participation rate. The study finds no quantitative capacity for additional provision over the plan period.

1.3.10 **Bingo** – The survey highlights low participation rate but high market share retention within Luton. The most popular destination is Mecca Bingo at Skimpot Road, Luton.

1.3.11 Nationally the industry is struggling as games of chance increasingly move to online/mobile platforms. Attendances are understood to be falling. Indicative quantitative analysis finds no residual demand in Luton for additional provision over the plan period.

1.3.12 **Health & Fitness** – The health and fitness industry has seen strong growth nationally. Locally, expenditure is anticipated to grow from £48m to £68m in the Study Area during plan period. The survey finds a participation rate of 35%. Study Area based facilities retain 68% market share and Luton based facilities retain 46% market share. Those who are active tend to be frequent participants. Proximity to facilities is an important determinant to usage. The most popular destination is Inspire Sport Village at Hitchin Road, Luton. Beyond Luton the most popular destinations are DW Sports Fitness (6.8%) and Dunstable Leisure Centre (4.6%) in Dunstable.

1.3.13 The survey indicates demand for increased facilities. The study finds a potential theoretical quantitative deficit of provision in Luton currently. Many existing facilities are anticipated to be over-subscribed.

1.3.14 The Council should consider planning for increased health and fitness facility provision. Additional provision of, for example, 24 hour gym facilities would assist with town centre diversification and encourage evening activity.

1.3.15 **Swimming Pools** – UK swimming has experienced an unexplained decline in recent years. Despite this it remains the UK's most popular sport. Locally, the Study identifies a participation rate of 35%. Study area facilities retain 65% market share. Luton based facilities retain a 32% market share. The coverage of community pools in the Borough is found to be generally adequate. The most popular single destination is the flagship facility Inspire: Luton Sports Village on Hitchin Road. Denbigh High School Pool is considered strategically important due it serving areas of higher deprivation[3]. Proximity is an important determinant for facility usage - participants generally utilise their nearest facility.

1.3.16 In planning for the health and fitness/ swimming sectors over the plan period the most commercially prudent use of resources (including land) would likely be seeking dual-purpose health and swim facilities.

1.3.17 **Restaurants/Cafes** - Expenditure is anticipated to rise from £432m to £614m in the Study Area over the plan period. Luton maintains around 31% market share of Study Area visits. High levels of visits are lost beyond the study area in the more peripheral zones where participants are more likely to seek 'other' destinations than utilise Luton based facilities.

[3] LBC Indoor Sports Facility Needs Assessment (March 2014)

1.3.18 With respect to Luton town centre additional provision may help avoid an over-reliance on retail and further diversify the town centre while promoting consumer choice. Quantitative analysis identifies an indicative cumulative capacity for up to 10,287sqm net of Class A3 floorspace to 2031 based on current market share.

1.3.19 While there is not currently considered to be a qualitative deficiency, going forward, the provision of complementary Class A3 non-retail uses should be delivered in tandem with retail development.

1.3.20 **Pubs/Clubs** - The pub industry has struggled nationally in recent years. Taxation, regulation, declines in disposable income and the smoking ban are considered to be contributing factors. Locally, there is not deemed to be a qualitative deficiency in Luton. Luton maintains a 20% market share of pubs/clubs visits with no one destination predominant. Beyond Luton, notable popular destinations include The Gary Cooper at Grove Park in Dunstable and The George at High Street, Harpenden.

1.3.21 WYG consider there is potential to encourage pub/club uses as part of a broader strategy to diversify and enhance the vitality and viability of the town centre, in particular the night time economy. Proposals should be considered on their merits.

1.3.22 **Museum/ Galleries** – The study finds a participation rate of nearly 40% albeit participation is relatively infrequent. Stockwood Discovery Centre is the most popular facility in the Study Area. London is the most popular destination for museum/gallery visits.

1.3.23 Opportunities should be sought to encourage additional/enhance existing facilities in Luton given the leakage of visits, primarily to London, and relative lack of choice available locally.

1.3.24 **Casinos** – The Study finds a very low participation rate but high market share retention. The Grosvenor G Casino on Park Street West, Luton is the most popular destination. Further afield Gala casino in Milton draws a significant proportion of Study Area casino visits (13%).

1.3.25 The Study finds no underlying need for additional casino provision. Any future proposals should be considered on their merits as part of a strategy to diversify and enhance the vitality and viability of the town centre.