



Local Plan 2035
Planning for the future

**UPDATED COMMERCIAL LEISURE NEEDS
STUDY**

APRIL 2017



Your Borough: Planning for the future

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1 Introduction

- 1.1 The purpose of the Commercial Leisure Needs Study is to provide a robust assessment of the future growth and floorspace requirements for commercial leisure in the borough up to 2035. The study aims to identify any current deficiency in commercial leisure facilities and consider whether there is any need for new provision in the borough. The study will support the evidence base and inform the preparation of the Local Plan. The study does not cover the provision of hotel accommodation which is considered separately.
- 1.2 Bedford Borough Council is preparing a new Local Plan to update the documents of the statutory development plan (Core Strategy and Rural Issues Plan, 2008, Bedford Town Centre Area Action Plan, 2008, Allocations and Designations Local Plan, 2013 and Bedford Borough Local Plan, 2002) and to take account of changes to the planning system. The Local Plan will have an end date of 2035.

2 Study context

- 2.1 This section of the study provides a brief overview of the study area, followed by a summary of relevant policy and documents relating to commercial leisure in Bedford.

Geography and connections

- 2.2 Bedford borough had a population of 157,479 at the 2011 Census and covers an area of 476 square kilometres (184 square miles). The borough includes the county town of Bedford, which together with adjoining Kempston, make up an urban area where approximately 66% of the population live. The remaining rural area contains a large number of villages and hamlets.
- 2.3 The town of Bedford is located in the south of the borough. Neighbouring smaller towns close to the borough boundary include Sandy and St Neots to the east, Rushden and Wellingborough to the north and Ampthill to the south. Larger towns nearby are: Milton Keynes 19 miles from Bedford to the south-west, Luton 19 miles to the south, Northampton 22 miles to the north-west and Cambridge 31 miles to the east. Central London is 57 miles away, a journey of as little as 35 minutes by the fastest scheduled train service.
- 2.4 There is good access to the strategic highway network, with the A421 trunk road linking Bedford with the M1 motorway and the A1 trunk road. Bedford is linked by railway to London and the East Midlands, and also via the Marston Vale line to Bletchley, Milton Keynes. The planned East – West Rail scheme will link Bedford to Oxford and Cambridge.

National planning policy review

- 2.5 The National Planning Policy Framework (NPPF), published in 2012, sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and some Circulars with a single, streamlined document.

- 2.6 At the heart of the NPPF is a 'presumption in favour of sustainable development', which should be seen as a golden thread running through both plan-making and decision-taking. The NPPF encourages local planning authorities to plan positively for the development and infrastructure required in their areas. The NPPF recognises that the planning system is plan-led and therefore local plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application.
- 2.7 The NPPF advocates a 'town centres first' approach and requires planning policies to promote competitive town centre environments and manage the growth of centres over the plan period. Local plans should be aspirational but realistic. They should address the spatial implications of economic, social and environmental change and set out opportunities for development and clear policies indicating what will or will not be permitted and where.
- 2.8 Local planning authorities should ensure that the local plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should take full account of relevant market and economic signals. Local planning authorities should use the evidence base to assess:
- The need for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including for retail and commercial leisure development.
 - The existing and future supply of land available for economic development and its sufficiency and suitability to meet identified needs.
 - The role and function of town centres and the relationship between them, including any trends in the performance of centres.
 - The capacity of existing centres to accommodate new town centre development.
 - Locations of deprivation which may benefit from planning remedial action.
- 2.9 This study is concerned with commercial leisure activities including leisure, entertainment facilities, the more intensive sport and recreation uses (including cinemas, restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowl centres, and bingo halls), theatres and concert halls. These are all considered to be main town centre uses by the NPPF

and new development proposals should locate as a preference in town centres, then in edge-of-centre locations and, only if suitable sites are not available should out-of-centre sites be considered.

Current development plan documents

Core Strategy and Rural Issues Plan

- 2.10 The Core Strategy and Rural Issues Plan was adopted in 2008 and forms part of Bedford's statutory development plan. It sets out the long term vision for the borough and strategic planning policies needed to deliver the borough-wide spatial vision. The Plan sets out the amount of housing and employment development needed up to 2021. It focuses most development in a Growth Area, comprising Bedford, Kempston and the northern Marston Vale. A policy of restraint on development applies to the remaining rural area, with development only allowed to meet local needs. Policy CP19 states that Bedford town centre is the preferred location for leisure and entertainment developments that attract a lot to people.

Bedford Town Centre Area Action Plan

- 2.11 This Plan was adopted in 2008 and sets out the vision for the regeneration of Bedford town centre up to 2021 in line with the Core Strategy and Rural Issues Plan. The Plan contains policies to guide the development of key sites in the town centre, including sites for leisure, entertainment and cultural development.

Allocations and Designations Local Plan

- 2.12 This Plan, which was adopted in 2013, identifies sites for development up to 2021 based on the scale and general locations already set out in the Core Strategy and Rural Issues Plan.

Bedford Borough Local Plan 2002

- 2.13 Amongst other things, the Bedford Borough Local Plan, which was adopted in 2002, sets out policies for how planning applications for retail and other town centre uses will be determined.

Other relevant documents

Bedford Economic Development Strategy

- 2.14 This document sets out an economic development vision, strategic priorities and key actions for the borough for the period 2011-14. One of its priorities is to improve Bedford town centre by delivering new investment and maximising its townscape and heritage quality. This includes redevelopment of key streets to provide an improved retail and leisure offer. The document is currently being reviewed.

Bedford's Growth Plan

- 2.15 Adopted in 2013, the Growth Plan identifies and secures delivery of key actions in order to target and stimulate private sector growth for business rates maximisation and associated economic benefits. Amongst its aims is the promotion of the vitality of Bedford's town centre. The Growth Plan promotes key infrastructure to support job growth delivery across the borough and seeks to create a distinctive, attractive and multi-functional town centre for the future through specific actions.
- 2.16 The Council has produced various other documents and been involved in schemes aimed at supporting the High Street including: A Strategy for Bedford High Street, High Street Townscape Heritage Initiative Scheme, Portas Pilot Initiative, Empty Shops Strategy.

3 Economic context

Demographic change in Bedford

- 3.1 The population of the borough was estimated to be 171,911 in 2016¹. The emerging Local Plan will set targets for housing growth in the borough up to 2035 in accordance with government guidance. The amount of growth that the new Local Plan will make provision for is currently being determined and is based on the projected increase in population. At the time of preparing this report this had only been expressed as the upper and lower extent of a range. For the purposes of this report the upper extent of the possible range of population growth has been used and is shown in the table below.

Demographic projection – 2016-2035								
	2016	2020	2024	2028	2032	2035	change 2016-2035	% change
Population	171,911	178,925	185,756	192,043	197,621	201,473	29,562	17%

Source: Opinion Research Services Ltd

- 3.2 These figures include the student population attending the University of Bedfordshire, with over 3,000 students based at the Bedford campus. It is worth noting that this population is likely to have different leisure preferences to the general population and may be expected to increase demand disproportionately for certain commercial leisure sectors such as bars, pubs and nightclubs.

National economic trends

- 3.3 This section examines key trends and drivers for change in the leisure industry.

¹ Projections by Opinion Research Services Ltd based on ONS

3.4 The downturn in the economy that started in 2008 and lasted a number of years is now over and the economy has been picking up. The weakness of the economy constrained household spending and particularly affected spending on discretionary items. However many consider that spending on leisure was generally more resilient during the recession than spending on more mainstream retail goods and services. Furthermore, the recovery in the economy that is now apparent is expected to lead to a faster growth in spending on the things that people cut back in the downturn. Spending on leisure services is now expected to rise by 2.2% per annum².

National commercial leisure market trends

3.5 The demand for commercial leisure facilities has increased significantly during the last 25 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 according to the ONS Family Expenditure Survey and by a further 48% between 1995 and 2005. However growth has been more limited since 2005 and many analysts consider that some sub-sectors such as bingo, multiplex cinemas and ten-pin bowling have now reached saturation in parts of the country.

3.6 The evening economy has been greatly affected by new technology. The growth of home entertainment such as: film downloads, TV sports channels, PlayStation, Xbox, Wii and sophisticated home gaming technology, means that for some there is no longer a need to go out for entertainment. The gaming sector has been hit by online gambling which is diverting revenues away from traditional gaming through betting shops, bingo halls and racecourses.

Cafés

3.7 Town centres have seen a large increase in the number of cafés and coffee shops since the late 1990s with brands such as Costa Coffee, Starbucks and Caffé Nero opening branches across the country, alongside a growth in independent cafes. Following the introduction of the smoking ban in public buildings, many of these cafés are now putting tables and chairs outside on pavements and pedestrianised streets under licence from the Council, adding a new social dimension to daytime

² Spotlight UK Commercial Leisure Q1 2015, Savills

shopping. These venues have become an important part of the economy as wi-fi availability has meant the coffee shop is replacing libraries and, in some cases, offices as a business meeting and working place. Increased competition from new brands such as Harris and Hoole (part owned by Tesco) is expected to lead to a 25% growth in coffee shops over the next five years³.

Restaurants, bars, pubs and nightclubs

- 3.8 During the 1980s and 1990s the expansion of the evening economy was one of the successes of town centres in the diversification and extension of their offer. The combined trends of public sector investment in the arts, greater affluence, a trend towards eating out and a growth in night clubbing, all helped to expand the market for pubs, restaurants and nightclubs. However, over the past decade the licensed leisure sector has had a number of far reaching changes and challenges to deal with.
- 3.9 When the Licensing Act 2003 came into force in 2005, late licensing was introduced, allowing pubs to extend their opening hours beyond 11pm, with many town centre pubs taking up this opportunity, especially on Fridays and Saturdays. This has meant that customers no longer need to move from pub to nightclub to continue drinking after 11pm, critically undermining a former competitive advantage for the nightclub industry.
- 3.10 The introduction of a smoking ban in public buildings in England and Wales in 2007 contributed heavily to a downward trend in visitor numbers to drinking establishments. Those pubs and nightclubs that lack the physical space outside to create smoking areas have particularly suffered, as have pubs in areas with a greater proportion of customers in the C2, D and E socio-economic groups that are traditionally associated with higher levels of smoking.
- 3.11 The economic downturn forced many consumers to reduce their leisure spend, which included expenditure at food and beverage outlets. Nevertheless, the restaurant market remained reasonably robust throughout the downturn and eating out and going out for a drink remain extremely popular activities. As beer consumption has continued its decline, the pub sector has continued to diversify into food, with many pubs now making more revenue from their food offer than from alcohol sales. Only the strongest brands and those with a strong budget food offer continue to grow. This is illustrated by national branded

³ 'Project Café 12 UK', Allegra Strategies, December 2012

pub and restaurant chains investing heavily, with operators such as All Bar One, J D Wetherspoons and Yates Wine Bars continuing to develop their portfolio of combined food and drink format premises. Nevertheless recent figures suggest that pub closure rates are now slowing, with the net number of pubs closing per week falling to 21 in June 2016⁴ nationally from a high of 31 per week in August 2014⁵.

- 3.12 According to Business in Sport and Leisure⁶, the nightclub industry has continued to see consolidation amongst operators. The leading brands are understood to be maintaining market share but the smaller chains, and in particular single operators, are feeling the severe economic pressures of competition from longer opening hours in the pub and bar sector.

Cinemas

- 3.13 The cinema market remains an important sector because cinemas often anchor town centre schemes and provide footfall for other uses, encouraging longer dwell times, extending periods of viable footfall and contributing to early evening/night-time uses in centres. Cinema admissions in the UK declined steadily during the 1950s and 1960s through to the 1970s but then began to steadily rise from 1984/1985 onwards. The principal drivers of the growth in cinema business have been investment in new multiplex cinemas and higher ticket prices. Investment in new cinemas continues, although this investment is being directed at replacing existing cinemas, developing new formats, improved digital production and better catering. Growth in this sector has slowed in recent years and in some areas appears to have reached saturation. Between 2005 and 2011 there was a 22% increase in the number of multiplex screens yet only a 5% increase in admissions. In 2013 box office revenues were down 1% on the previous year⁷, however the largest operators, Odeon and Cineworld, both reported increased revenues in 2015⁸. Some cinema operators, such as Curzon, Everyman, City Screen, Mainline Pictures and Real Time cinemas, have opened new smaller cinemas or taken over small cinemas in recent years. These operators tend to focus on providing a more personal atmosphere, which is proving popular. The total number of UK cinema sites fell between 2006 and 2014 from 783 to 745, but has since recovered to 788 in 2016⁹.

⁴ CAMRA press release, June 2016

⁵ CAMRA press release, August 2014

⁶ 'Active Annual', Business in Sport and Leisure, 2009

⁷ Spotlight UK Commercial Leisure Q1 2014, Savills

⁸ Spotlight UK Commercial Leisure Q1 2016, Savills

⁹ The UK Cinema Association, 2017

Health and fitness

- 3.14 The health and fitness sector witnessed major growth during the 1990s and into the early 2000s as public awareness about personal fitness increased. By 2016 there were 6,435 combined public and private sector fitness sites across the UK and the total number of UK health and fitness members at public and private gyms and health clubs is estimated in 2016 to be 9.2 million¹⁰. This suggests that around 14% of the population are now members of a private health club or registered users of a leisure centre gym in the UK. This has grown from around 9% in 2002 and looks set to continue to grow. 224 new public and private fitness facilities opened in the last 12 months, up from 191 in 2015¹¹.
- 3.15 Private health clubs in the UK range from small independent clubs to large operators such as David Lloyd, Virgin Active, LA Fitness, Esporta, Fitness First and Nuffield Health. The largest health clubs can have memberships of up to 4,000 people, however independent clubs remain a strong presence in the private sector market, making up 55% of all private clubs. No-contract budget operators such as The Gym Group, Pure Gym and easyGym continue to grow rapidly and premium operators are having to change their business models to compete. Public sector sports centres are also an important element of the market and they tend to offer cheaper and more flexible membership and pay as you go usage rates.
- 3.16 During the economic downturn the health and fitness sector remained robust with larger higher-end clubs adding spa and family offers to differentiate themselves from the public sector and with the growth of smaller low-cost gyms providing a value product priced below that of the public sector. The health and fitness industry total market value grew by 3.9% to £4.08bn over the year to March 2014¹².

Bingo

- 3.17 The bingo market in the UK peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then, however, the sector has struggled to compete with other leisure gaming activities, including the impact of the National Lottery and online bingo and

¹⁰ State of the UK Fitness Industry Report 2016, The Leisure Database Company

¹¹ State of the UK Fitness Industry Report 2016, The Leisure Database Company

¹² Spotlight UK Commercial Leisure Q1 2015, Savills

gaming platforms. In addition, the bingo industry was severely affected by the introduction of the smoking ban in 2007. However, from a low point in 2010 (496 premises) there was a steady increase to 2013 (680 premises), although the figure has since fallen slightly with 575 premises operating in September 2016¹³.

Casinos

- 3.18 The casino industry in the UK is well established and casino operators active in the current UK market include Rank/Grosvenor, Genting UK, Aspers, Ladbrokes and Gala Coral. These operators have a variety of brands catering for different markets and demographics dependent upon their location. In addition in the UK there are several smaller privately run casinos.

Ten-pin bowling

- 3.19 Ten-pin bowling grew quickly in the UK in the 1960s. However, the complex scoring system and lack of investment led to its near demise in the 1970s when approximately two thirds of all bowling centres closed or were typically converted into bingo clubs. However, during the 1980s, there was a resurgence of interest in ten-pin bowling spurred by the development of computer scoring which simplified playing of the game. During the late 1980s and early 1990s the number of bowling centres in the UK grew to over 200. According to Business in Sport and Leisure¹⁴ the number of bowling centres in the UK is still increasing and there is a trend to build large entertainment complexes with bowling centres as part of leisure developments which will also often include multi-screen cinemas, restaurants and nightclubs.

Indoor play

- 3.20 The children's indoor play market grew during the 1990s, with the growth of play facilities attached to family pub-restaurants such as Brewster's and among independent providers, often in large former factories and warehouses. There has been some growth in this sector since the economic downturn with new activities emerging such as adventure golf, laser combat and

¹³ Gambling Commission – Industry Statistics April 2013 to March 2016

¹⁴ 'Active Annual', Business in Sport and Leisure, 2009

trampolining. This is still a highly fragmented, fledgling industry with few multiple chains, although a number of overseas operators are now moving into the market¹⁵.

Other sports

3.21 Other areas of the sport sector have seen growth despite economic challenges. Five-a-side football centres are increasing in numbers and the two major operators, Goals and Powerleague, continue to acquire new sites. These modern facilities provide new generation Astroturf floodlit pitches with on-site parking and a bar. Commercial sport provision remains a difficult market due to subsidised provision in the public sector, which benefitted from £1.5 billion of investment in the run-up to the Olympics. The Olympics itself led to an increase in demand for sporting activity. However, it remains uncertain whether this will lead to any long term increase in participation rates that have hitherto been largely in decline across many sports.

¹⁵ Spotlight UK Commercial Leisure Q1 2015 and Q1 2016, Savills

4 Demand

- 4.1 Demand from branded leisure operators for floorspace in Bedford is indicated by approaches made to the Council's Economic Development Unit by companies, agents and individuals about development opportunities in the borough. During 2016/17 the Unit received about 4 enquiries for gym / fitness centre type operations. In addition there were 13 enquiries for restaurant / café type businesses. A further 6 enquiries were also received for other leisure type operations.
- 4.2 In both 2014 and 2015 the Council invited landowners and other interested parties to suggest development opportunities to be considered for inclusion in the new Local Plan. In relation to commercial leisure development, only one site was put forward in response to the 'call for sites'. The site, on open land at Goldington Road on the eastern edge of Bedford, was proposed for a mixed use employment and retail/leisure development which could include an indoor sporting facility such as a gymnasium. No operator was named or information given about how the development could be financed.
- 4.3 This level of response should not be interpreted as there being no demand for further leisure development in Bedford, only that operators did not see the need for proposals to be allocated in the Local Plan. This may reflect a desire for greater flexibility than can be offered through the statutory development plan route or uncertainty over future prospects. Applications for planning permission to develop new leisure facilities do come forward from time to time.

5 Potential for leisure and entertainment uses

5.1 The remainder of this study presents an analysis of the capacity for additional leisure floorspace over the period to 2035.

Catchment potential

5.2 Bedford's role as a major centre means that it has a significant catchment area which extends beyond the administrative area of the borough. The Bedford Retail Study, 2015 (updated 2017) defined a study area to assess Bedford town centre's role within the sub-region. In order to undertake a sufficiently fine grained analysis of spending patterns the catchment area was divided into twelve zones defined by postcode sectors as shown on the map in Appendix 1.

5.3 Bedford's role within the catchment area is constrained by the presence of larger centres, particularly at Milton Keynes, as described in Section 2 'Study context'. This is likely to limit the potential for new commercial leisure facilities in Bedford as competing centres draw away expenditure.

5.4 Section 3 'Economic context' has examined the demographic and economic changes expected in the borough and considered national trends in the commercial leisure market sector. For the Bedford catchment area, taken together, these trends mean that the expected increase in population will result in greater potential expenditure available for leisure. Although some of this can be expected to be spent outside the borough, there will also be an increase in leisure expenditure in Bedford, particularly for those sub-sectors which are continuing to expand and those which do not require extensive catchments.

Methodology

5.5 In general terms, whilst it is possible to assess the need for future requirements for commercial leisure facilities, the assessment criteria and methodologies are not well developed and there is no robust methodology for forecasting floorspace capacity for specific forms of leisure development. As a consequence, whilst the potential need for additional commercial leisure facilities is explored in this study, it is stressed that development in the leisure sector has historically been market-led, with operators seeking out potential opportunities where there is a perceived shortfall or competitive advantage. In any event,

new leisure formats are continually evolving fuelled by external factors. Furthermore, where they fall within the D2 use class¹⁶ leisure facilities are able to switch between different types without the need to apply for planning permission, just as pubs can switch to restaurant or shop uses. However, in order to provide an indication of capacity for additional commercial leisure facilities, this study examines current and forecast growth in overall leisure expenditure and a number of specific subsectors, together with projected potential floorspace growth in relation to existing leisure floorspace and national trends.

5.6 A household survey conducted by NEMS in November 2014 (as part of the Bedford Retail Study, 2015) asked questions to determine whether residents participated in various commercial leisure activities and where they travelled to them. The most popular destinations for residents of each survey zone are set out by category in the table below.

Household survey – residents’ participation in commercial leisure activities						
Survey Zone	Restaurants / cafes	Bars / clubs & pubs	Cinema & theatre	Health & fitness	Bingo / casino	Family entertainment*
Zone 1	Bedford (58%)	Bedford (41%)	Cineworld, Bedford (46%)	Bedford (38%)	Bedford (10%)	Milton Keynes (24%)
Zone 2	Bedford (41%)	Bedford (24%)	Cineworld, Bedford (37%)	Bedford (13%)	Bedford (7%)	St Neots (15%)
Zone 3	Amphill (38%)	Amphill (35%)	Cineworld, Bedford (38%)	Bedford (11%)	Bedford (1%)	Milton Keynes (14%)
Zone 4	Bedford (39%)	Bedford (25%)	Cineworld, Bedford (26%)	Bedford (18%)	Milton Keynes (14%)	Milton Keynes (21%)
Zone 5	Bedford (24%) / Rushden (24%)	Rushden (14%)	Cineworld, Bedford (21%)	Bedford (9%) / Rushden (9%)	Northampton (7%)	Wellingborough (25%)
Zone 6	St Neots (65%)	St Neots (54%)	Cineworld, St Neots (55%)	St Neots (22%)	Bedford (8%)	St Neots (36%)
Zone 7	Cambridge (26%) / St Neots (22%)	St Neots (9%)	Cineworld, Huntingdon (17%)	St Neots (11%)	Northampton (5%)	St Neots (18%)
Zone 8	Biggleswade (37%)	Biggleswade (28%)	Cineworld, Stevenage (35%)	Biggleswade (14%)	Biggleswade (6%)	Stevenage (25%)

¹⁶ Town and Country Planning (Use Classes) Order 1987 (as amended)

Zone 9	Hitchin (18%)	Milton Keynes (9%) / Hitchin (9%)	Cineworld, Stevenage (17%)	Flitwick (8%)	Milton Keynes (9%)	Milton Keynes (22%)
Zone 10	Milton Keynes (40%)	Milton Keynes (19%)	Cineworld, Milton Keynes (36%)	Flitwick (6%)	Bedford (8%)	Milton Keynes (29%)
Zone 11	Northampton (25%)	Olney (16%)	Cineworld, Northampton (18%)	Wellingborough (15%)	Northampton (8%)	Wellingborough (31%)
Zone 12	Huntingdon (26%)	Kimbolton (11%) / Huntingdon (11%)	Cineworld, Huntingdon (20%)	Huntingdon (11%)	Peterborough (6%)	St Neots (10%)
Total for all zones	Bedford (26%)	Bedford (17%)	Cineworld, Bedford (22%)	Bedford (15%)	Bedford (5%)	Milton Keynes (15%)

*Family entertainment – ten-pin bowling, ice skating, children’s play centres, etc.

Source: NEMS Household Survey 2014

5.7 Bedford is the most popular destination for residents in the catchment as a whole for all leisure services except for family entertainment (ten pin bowling, ice skating, children’s play centres, etc) where most people travel instead to Milton Keynes. However there is considerable variation for individual zones within the overall catchment area, particularly for those zones closest to nearby towns with competing facilities. The size of the percentage figure indicates the relative dominance of a destination within the zone or the catchment area as a whole.

- Restaurants and cafés – Approximately 26% of those surveyed identified Bedford as the location where they spent most money on restaurants and cafés. This was followed by Milton Keynes (10%) and St Neots (7%). Approximately 21% of respondents either do not do this activity or didn’t know the answer.
- Bars, clubs and pubs – Approximately 17% of those surveyed identified Bedford as the location where they spent most money on bars, clubs and pubs. This was followed by St Neots (5%). Approximately 44% of respondents either do not do this activity or didn’t know the answer.
- Cinema and theatre – Approximately 22% of those surveyed identified the Cineworld at Aspects Leisure Centre, Bedford as the location where they spent most money on cinemas and theatres. This was followed by the Cineworld at Xscape, Milton Keynes (9%), Cineworld at Stevenage Leisure Park (7%) and the Cineworld at the Rowley Arts Centre, St Neots (6%). Approximately 29% of respondents either do not visit the cinema or theatre, or didn’t know the answer.

- Health and fitness – Approximately 15% of those surveyed identified Bedford as the location where they spent most money on health and fitness. This was followed by St Neots (3%). Approximately 65% of respondents either do not visit health and fitness facilities or didn't know the answer.
- Bingo and casinos – The most popular betting destination was Bedford at just 5%. This was followed by Milton Keynes (4%), Northampton (2%) and Luton (2%). 85% of those taking part in the survey either do not go to bingo or casinos, or did not know the answer.
- Family entertainment (ten-pin bowling, ice skating, children's play centres, etc) – Milton Keynes was the most popular destination for family entertainment (15% of those surveyed). This was followed by Bedford (6%). Approximately 59% of respondents either do not go to family attractions or didn't know the answer.

5.8 It is generally recognised that commercial leisure facilities will draw the main part of their trade from residents living within a twenty minute travel time of facilities. However in addition, major leisure facilities such as large-scale multiplex cinemas and ten-pin bowling centres, require large catchment populations. As a result Bedford suffers from the proximity of the larger centres and leisure facilities available at Milton Keynes and also at Cambridge and Northampton. In these towns the extensive facilities support larger catchment areas, draw people from the Bedford area and reduce the potential of new facilities locating in Bedford.

5.9 Where possible, the results of the household survey have been utilised to quantify the requirement for new commercial leisure facilities in Bedford. This has been supplemented by an analysis of typical patronage rates per head of population and standard benchmarks applied. This is then compared against existing commercial leisure provision in Bedford to identify any requirement for additional facilities, taking account of known existing commitments.

5.10 This detailed approach is augmented by modelling and apportioning forecast growth in general leisure expenditure. Experian provides data on per capital leisure expenditure in Classification of Individual Consumption by Purpose (COICOP) categories. This resource is used to determine a broad level of demand and hence give an indication of scope for additional leisure facilities. The current estimated expenditure per head for Bedford on leisure activities is shown in the table below.

Bedford's leisure expenditure per head – 2016-2035						
Category	2016	2020	2024	2028	2032	2035
Food and drink	£1042	£1077	£1136	£1206	£1280	£1358
Games of chance	£147	£152	£160	£170	£180	£191
Personal grooming	£102	£105	£111	£118	£125	£133
Accommodation services	£255	£263	£278	£295	£313	£332
Recreational & sporting services	£116	£120	£126	£134	£142	£151
Cultural services	£283	£292	£308	£327	£347	£369
Total (may not add up due to rounding)	£1944	£2009	£2120	£2250	£2388	£2534
UK average	£2031	£2099	£2214	£2350	£2494	£2647

Source: Experian Ltd, 2016

5.11 The annual expenditure per head on leisure activities in 2016 was estimated to be £1,944 per person, which is slightly below the UK average. Leisure spend is forecast to grow by about 30% to an average of £2,534 per head by the end of the plan period in 2035. When multiplied by the number of residents in the borough, and taking account of projected population growth, the total forecast expenditure on leisure activities is as shown in the table below.

Bedford's total leisure expenditure forecast – 2016-2035 (£m)							
Category	2016	2020	2024	2028	2032	2035	Total change 2016-2035
Food and drink	£179.1	£192.7	£211.0	£231.6	£253.0	£273.6	£94.5
Games of chance	£25.3	£27.2	£29.7	£32.7	£35.6	£38.5	£13.2
Personal grooming	£17.5	£18.8	£20.6	£22.7	£24.7	£25.2	£7.7
Accommodation services	£43.8	£47.1	£51.6	£56.7	£61.9	£66.9	£23.1
Recreational & sporting services	£19.9	£21.5	£23.4	£25.7	£28.1	£30.4	£10.5
Cultural services	£48.7	£52.3	£57.2	£62.8	£68.6	£74.3	£25.6
Total (may not add up due to rounding)	£334.2	£359.5	£393.8	£432.1	£471.9	£510.5	£176.3

Source: Experian, 2016 and ORS population projection

- 5.12 As can be seen in this table, total expenditure on leisure services is projected to increase from £334.2 million in 2016 to £510.5 million in 2035. The category with the greatest expenditure in 2035 is expected to continue to be food and drink.
- 5.13 It is important to note that these figures are based on expenditure and population projections and therefore can only be an indication as to what might be expected in Bedford by 2035. Furthermore, although the expenditure projections continue to 2035, the reliability of such forecasts decreases over time. Nevertheless, the projected increase in spending could reasonably be expected to increase demand for floorspace. The extent to which this results in new development is likely to be limited by the opportunities for more efficient use of existing floorspace however.

6 Current and potential future provision

Cinemas

- 6.1 There is one cinema in Bedford at Aspects Leisure Park, Newnham Avenue (six screens operated by Cineworld, with 1,014 seats in total) which opened in 1990. Planning permission was granted in 2014 for improvements to the cinema that would increase the number of screens to nine (with no change in seating capacity) but this has yet to be implemented. In addition a new cinema is due to open in spring 2017 in Bedford town centre as part of the Riverside North development. This will provide seven screens, with 1,012 seats in total.
- 6.2 Cinemas in nearby centres also serve the Bedford catchment area, particularly where they offer larger facilities than are available in Bedford. Drawing on the results of the household survey, the main cinemas serving the Bedford catchment include:
- Cineworld, Milton Keynes (16 screens, 3,335 seats)
 - Cineworld, Stevenage (16 screens, 3,023 seats)
 - Cineworld, St Neots (six screens, 882 seats)
 - Odeon, Kettering (eight screens, 1,321 seats)
 - Cineworld, Northampton (nine screens, 2,028 seats).
 - Cineworld, Huntingdon (ten screens, 1,793 seats).
- 6.3 The household survey results for the whole catchment area indicate that 71% of respondents visit the cinema. 21.5% of respondents visit the cinema at Aspects Leisure Park. The proportion visiting Aspects varies from 46% in zone 1 (the zone closest to Bedford where most borough residents live), reducing to 21-38% in zones 2-5 (the zones that cover the rest of the borough). Bedford's attraction as a destination can be expected to increase following completion of the committed developments referred to above, however the larger facilities in nearby centres will continue to draw some people away. To assess the demand for cinemas within Bedford it is assumed that 30% of cinema trips can be retained within the catchment area once committed developments have been completed. The catchment potential has then been converted into a total

number of expected cinema screens and seats, which is calculated by dividing the catchment potential population by the national average (16,523 people per screen and 79 people per seat)¹⁷. The results are shown in the table below.

Cinema potential in Bedford – 2016-2035						
	2016	2020	2024	2028	2032	2035
Catchment area population	433,212	451,218	468,819	484,965	499,705	510,751
Market retention	12.3%	30%	30%	30%	30%	30%
Catchment potential	53,285	135,365	140,646	145,490	149,912	153,225
Cinema screen potential	3	8	9	9	9	9
Cinema seat potential	675	1,714	1,780	1,842	1,898	1,940
Existing / committed screen provision	6	16	16	16	16	16
Existing / committed seat provision	1,014	2,026	2,026	2,026	2,026	2,026

Note: Population base data supplied by Experian MMG (2015) and projections derived from ORS figures applied consistently across all zones. Source: Bedford Retail Study Update, 2017

- 6.4 The above analysis suggests that there is no current shortfall and that by 2035, taking account of population growth and the expected increased market retention, provision will be sufficient. It can be concluded that there is no requirement to plan for additional cinema provision over the period covered by the Local Plan.

Restaurants, cafés, drinking establishments

- 6.5 Food and drink establishments (use classes A3, A4, A5)¹⁸ including restaurants, cafes, bars and pubs, are typically found in town centres but can also be found at some out-of-centre retail parks. National information available from Experian Goad indicates that the proportion of restaurant and food takeaway uses within town centres across the country has increased since 2000 as shown in the table below.

¹⁷ UK Cinema Industry Infrastructure 2006-2016, UK Cinema Association

¹⁸ Town and Country Planning (Use Classes) Order 1987 (as amended)

Town centre use class mix, Great Britain						
Type of unit	% change 2000 - 2017	Proportion of total number of units (%)				
		2000	2005	2009	2013	2017
Class A1 (retail)	-10.5	59.1	56.4	54.0	49.4	48.6
Class A1 (services)	+2.3	8.2	9.6	9.8	11.1	10.5
Class A2	+0.4	8.9	8.9	9.0	8.5	9.3
Class A3 / A5 *	+6.1	11.2	13.7	14.5	16.1	17.3
Miscellaneous	-0.2	1.4	1.4	1.3	1.1	1.2
Vacant / under construction	+1.0	11.2	10.1	11.4	13.6	12.2
Total		100	100	100	100	100

Source: Experian Goad Centre Reports *excludes class A4 (bars/public houses)

- 6.6 The proportion of class A1 retail uses in town centres surveyed by Experian Goad decreased by 10.5% in the period 2000 to 2017, whilst class A3 and A5 uses and vacant units have increased.
- 6.7 Within the catchment area, the household survey indicates that approximately 80% of households regularly visit restaurants and cafés, while around 56% of households visit bars and pubs. Bedford town centre is the main destination for both restaurant and pub / bar visits within the study area with respondents also using facilities within Kempston, other towns and various local village centres and other rural locations.
- 6.8 The mix of uses in Bedford town centre is shown in the table below.

Town centre use class mix, Bedford		
Type of unit	Number of units	Proportion of total number of units (%)
Class A1 (retail)	174	44.4
Class A1 (services)	34	8.7
Class A2	49	12.5
Class A3 / A4 / A5	61	15.6
Miscellaneous	33	8.4
Vacant / under construction	41	10.5
Total	392	100

Source: BBC survey of Primary Shopping Area, November 2014

- 6.9 A review of class A3/A4/A5 uses in Bedford town centre indicates that there is a strong representation of cafés, hot food takeaway outlets and drinking establishments. The ratio of types of use in Bedford is broadly similar to the national average, however the proportion of vacant units is lower in Bedford.
- 6.10 Spending on food and drink is the largest household leisure expenditure item and the most frequently participated in leisure activity. It is expected that the sector will continue to grow over the plan-period. Growth projections suggest an increase in expenditure of £94.5 million between 2016 and 2035, resulting in greater demand for outlets. Much of this can be expected to be accommodated through increased turnover at existing outlets or the change of use of other units to food / drink uses. However new retail schemes typically include class A3 – A5 uses so it can be expected that there will some scope for further food and drink development over the plan period to complement anticipated class A1 retail growth. (See the Bedford Retail Study Update, 2017 for estimates of the amount of additional class A1 retail floorspace required.)
- 6.11 Given national market trends in the sector it is likely that the strongest demand will be for restaurant uses or hybrid ‘chameleon’ bars that provide a mix of café, restaurant, bar and nightclub / music venue space with each use expanding and contracting at different times of the day to suit demand.

Nightclubs

6.12 In 2005 there were 3,144 night clubs across the country, according to the Association of Licensed Multiple Retailers. By 2015 this had fallen to 1,733. This equates to approximately one per 35,000 people (source Mintel, 2012). Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are currently six nightclubs licensed in Bedford, as follows:

- Empire, 29 Mill Street – capacity 1000 (approx.)
- The Vibe, 15-19 St Peter's Street – capacity 775
- Esquires, 60 Bromham Road – capacity 500
- Hi-Fi, 30-32 High Street – capacity 640
- Vogue, 55 High St – capacity not known
- Six's, 30 The Broadway – capacity 275
- The Pad, 2 Lurke Street – capacity 189.

6.13 Given the borough's population, this level of provision would imply that there is no current shortfall and that, taking account of population growth, there would be adequate provision over the plan-period. In spite of the large student population based at the University of Bedfordshire campus, which can be expected to increase demand locally, nightclubs in Milton Keynes, Luton and Northampton also draw on the Bedford catchment area and restrict the potential for additional provision in Bedford. In recent years several nightclubs in Bedford have changed name or ownership while others have closed permanently, including: Oxygen, 119 Midland Road; and New York New York, 18 St Peter's Street.

Music venues and theatres

6.14 Within the borough the main live music venues are:

- Bedford Corn Exchange, St Paul's Square – 1,000 capacity main auditorium, plus Harpur Suite (180 capacity) and Howard Room (100 capacity)
- Esquires, 60 Bromham Road – 200 capacity main stage.

6.15 A number of other venues also host live music performances from time to time, including:

- St Paul's Church, St Paul's Square
- Bunyan Meeting, Mill Street
- St Andrew's Church, Kimbolton Road
- Bedford School, De Parys Avenue
- Bedford Girls School, Cardington Road
- The Ent Shed, Castle Road
- various town pubs and bars.

6.16 Theatrical performances are held at the following locations:

- Bedford Corn Exchange, St Paul's Square – 830 seats
- The Quarry Theatre at St Luke's, 26 St Peter's Street – 286 seats
- University of Bedfordshire Theatre, Polhill Avenue – 280 seats
- Trinity Arts and Leisure Theatre, The Bedford Sixth Form, Bromham Road – 156 seats
- The Place, Bradgate Road – 130 seats
- Mill Theatre, Mill Road, Sharnbrook – 192 seats.

6.17 Spending on cultural services is expected to continue to grow over the plan-period. Growth projections suggest an increase in expenditure of £25.6 million to 2035, resulting in greater demand. Bedford's catchment is already served to some extent by larger music venues and theatres at Milton Keynes, Northampton and Cambridge. The cultural reputation of these towns allows them to attract national performances and this has an impact on the likely demand for facilities in Bedford, although the residency of the Philharmonia Orchestra at the Corn Exchange has continued since 1995. The relatively short journey to London also helps meet the borough's need for high profile, national performances. Furthermore, there is a trend for some popular London theatrical performances to be screened live at regional cinemas. There is therefore unlikely to be a need for additional music venues or theatres in the borough. The anticipated increase in expenditure is likely to be absorbed by the

existing venues that residents visit. Nevertheless, if proposals are brought forward, they should be supported as they would enhance the overall offer.

Health and fitness

6.18 There are a number of public and private health and fitness clubs in Bedford borough as follows.

Indoor health and fitness provision in Bedford		
Gym / leisure centre	Type	Facilities
Robinson Pools and Fitness, Bedford Park	Public	Gym, swimming pool
Kempston Pool, Hillgrounds Rd	Public	Gym, swimming pool, sauna
Oasis Pool, Cardington Rd	Public	Gym, swimming pool
John Bunyan Sports and Fitness, Mile Rd	Public	Gym, sports hall, squash courts
Bedford International Athletic Stadium, Barkers Lane	Public	Gym, sports hall
Trinity Arts and Leisure, The Bedford Sixth Form, Bromham Road	Private	Gym, swimming pool, sports hall
Wyboston Lakes Health & Leisure Club, Great North Rd, Wyboston	Private	Gym, swimming pool, sauna
Twinwoods Adventure Centre, Thurleigh Rd, Milton Ernest	Private	Gym, swimming pool, sauna, indoor skydiving
Paula Radcliffe Centre, Odell Rd, Sharnbrook	Private	Gym, sports hall, squash & tennis courts
Fitness First, Aspects Leisure Park, Newnham Ave	Private	Gym, sauna
Flexibility, Silver St	Private	Gym, sauna
Samsons Fitness, 92 Midland Rd	Private	Gym
PureGym, Bedford Heights, Manton Lane	Private	Gym
The Gym, Alban Retail Park, London Rd	Private	Gym
World Gym, 11-12 Shuttleworth Rd	Private	Gym, sauna
Crossfit, 4-6 Sergeants Way	Private	Gym
Hot Gates Crossfit, 80 College St	Private	Gym
Sculpt Fitness, Box End Park, Kempston	Private	Gym
Towers Health & Racquet Club, Clapham	Private	Gym, swimming pool, squash & tennis courts

6.19 Bedford borough has at least 19 public and private health and fitness clubs (not counting classes held in various school and community halls). The household survey indicates that 35% of respondents in the catchment area or their families visit a health and fitness club. 17% of those surveyed attended health and fitness destinations within the borough. The population of the catchment area is estimated at 433,212 residents in 2016, which could generate demand for about 60,650 public and private membership places, based on the national average membership rate of 14% of the total population¹⁹. If 17% of these membership places are retained in the borough then the 19 public and private health and fitness clubs identified above attract 10,310 people in total, which implies an average of around 543 members per club. Nationally, the average health club has 1,430 members (9.2 million total memberships divided by 6,435 facilities²⁰) which is much greater than Bedford's average membership. This suggests that there is not any sustainable quantitative need for additional health and fitness clubs in Bedford borough at present.

6.20 The population of Bedford's catchment area is expected to increase by 77,539 between 2016 and 2035, which would generate around 10,855 new health club members, of which 1,845 (17%) would be retained in the borough. This is based on an unchanged national average membership rate of 14%. Furthermore, the examination of expenditure growth on recreation and sporting services suggests an increase in expenditure of £10.5 million to 2035. Although the rise in population and expenditure may be expected to result in a greater demand which could support additional new health and fitness clubs in the area, such a conclusion should be treated with caution given the lower than average size of clubs locally. It is more likely that surplus demand would be absorbed by the existing provision rather than development of new facilities. Nevertheless, competition and qualitative improvements may result in some new health and fitness clubs emerging over the plan period.

Bingo halls, casinos

6.21 Gala and Mecca are the main bingo operators, controlling almost 40% of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, closing dated premises, such as converted cinemas, and moving into purpose built units. Bingo clubs have become increasingly sophisticated and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public

¹⁹ Spotlight UK Commercial Leisure Q1 2015, Savills

²⁰ State of the UK Fitness Industry', The Leisure Database Company, 2016

transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000²¹.

- 6.22 There are two bingo halls in Bedford: Club 2000 at Aspects Leisure Park, Newnham Avenue and Mecca at 57 London Road. The household survey indicates that only 8% of households in the catchment area visit bingo halls; 3% of those surveyed visited bingo halls in Bedford. According to the Gambling Commission, there were 575 licensed bingo clubs in operation in Great Britain in September 2016²². At a national level this approximates to around one club per 108,000 people. This means that the population of Bedford borough (estimated at 171,911 residents in 2016) could support up to two bingo halls. Given that there are already two bingo halls in Bedford this would suggest that there is no need for further provision.
- 6.23 There were 148 licensed casinos operating in Great Britain in March 2014²³, which equates to approximately one casino per 420,000 people. Attendance at casinos by members and guests was 20.6 million trips in 2015/16²⁴. There are no casinos within Bedford borough, but nearby Milton Keynes and Luton both have casinos. Bedford borough does not have a catchment population large enough to support a casino and, given the low participation rate, it would be reasonable to assume that operators' requirements are met in Milton Keynes and Luton.

Family entertainment (ten-pin bowling, ice skating, children's play centres)

- 6.24 There are no ten-pin bowling centres in Bedford borough following the closure of Megabowl at Aspects Leisure Park in 2005. The nearest ten-pin bowling facilities are located at Milton Keynes (Hollywood Bowl, 18 lanes), Wellingborough (AMF, 24 lanes), Dunstable (Go Bowling, 32 lanes) and Stevenage (Hollywood Bowl, 26 lanes). The household survey results suggest that about 40% of households in the catchment area visit family entertainment facilities (mainly ten-pin bowling and ice skating facilities). The destinations most often visited are Milton Keynes (15%), Wellingborough (4%) and Stevenage (4%).

²¹ 'Active Annual', Business in Sport and Leisure, 2009

²² Gambling Commission – Industry Statistics 2013-2016

²³ Gambling Commission – Industry Statistics 2013-2016

²⁴ Gambling Commission – Industry Statistics 2013-2016

- 6.25 The borough population as a whole could theoretically support 13 lanes, based on the national average of one lane per 12,300 people²⁵. However, this assumes 100% retention of ten-pin bowling trips, which is unlikely given the competing facilities nearby.
- 6.26 Ten-pin bowling centres generally require large buildings of between 2,500 square metres to 5,000 square metres to accommodate the bowling lanes and other ancillary food, drink, gaming and other entertainment facilities. The main ten-pin bowling operators (AMF, Ten Pin, Hollywood) tend to locate in mixed use retail and leisure parks. The smaller format All Star Lanes is currently expanding but at present its only representation out of London is in Manchester and its target market is therefore likely to be other regional centres.
- 6.27 Although there may be potential for ten-pin bowling in Bedford, given the locational requirements of operators and the existing provision nearby, it may not be viable to develop a facility in Bedford over the period to 2035.
- 6.28 There are three indoor play centres in Bedford borough: Kids World / Laser World, Kingsway, Bedford; John Bunyan Sports Centre, Mile Road, Bedford; and Playhouse at Twinwoods Adventure Centre, Thurleigh Road, Milton Ernest.
- 6.29 Indoor play centres are a growing area in the commercial leisure sector and are becoming more common in less central locations but there is no available data on national patronage rates for such facilities. It is therefore difficult to determine whether there is any latent demand for additional provision in Bedford borough.
- 6.30 It is possible that the projected growth in population in the borough will result in additional demand for children's play facilities, however given the uncertainty over demand it is not advisable to allocate land for future provision. If proposals are forthcoming it will be important to ensure that they are sited in appropriate locations as it is becoming increasingly common for operators to seek less central premises such as industrial estates or out-of-centre retail and leisure parks.

²⁵ 'Active Annual', Business in Sport and Leisure, 2009

Other cultural services

6.31 Demand for cinemas, music venues and theatres have already been considered above. Other cultural services, such as museums, are not usually considered as commercial leisure as they generally require some form of subsidy. Nevertheless, visiting museums and art galleries are popular leisure pursuits and are an important part of the commercial leisure economy in supporting the use of cafés, restaurants and shops. They are also important in attracting the students, tourists, employers and employees that underpin the higher education, tourism and economic base of Bedford.

6.32 Museums and art galleries in the borough include:

- The Higgins, Castle Lane, Bedford – recently refurbished and extended museum of Bedford’s history together with extensive art collection.
- Bunyan Museum, Castle Lane, Bedford – tells the story of local author and preacher John Bunyan.
- Moot Hall, Church End, Elstow – museum illustrating life and traditions in 17th century England.
- Panacea Museum, Newnham Road, Bedford – tells the story of a Bedford religious community.
- Eagle Gallery, Castle Road, Bedford – gallery for the work of local artists.
- The Glenn Miller & Twinwood Museum, Twinwood Road, Clapham – restored 1940’s airfield control tower and military buildings dedicated to Glenn Miller and wartime life.
- 306th Bombardment Group Museum, Thurleigh Airfield Business Park – museum of Second World War US bomber airfield and wartime memorabilia.

6.33 Bedford has an extensive provision of museums for its size and this is a strength that benefits the area.

7 Conclusions

- 7.1 The new Local Plan for the borough anticipates an increase in population of 17%. Total expenditure on leisure is forecast to grow by about 53% by the end of the plan period in 2035, an increase of £176.3 million from 2016. Looking at existing commercial leisure provision in Bedford and comparing this with typical patronage rates per head of population indicates that for most leisure categories there is adequate provision. However, over the plan-period there may be a requirement for additional restaurants and cafés, and qualitative changes may result in more health and fitness clubs emerging.
- 7.2 It is not recommended that specific land allocations are made in the Local Plan for these further requirements. Not only is there uncertainty over the timing of when the demand will arise, but much of the requirement can be expected to be accommodated through the re-occupation or expansion of existing premises. Given the locational requirements for these types of leisure facilities, this demand is most likely to arise in or close to Bedford.

Appendix 1

