WYG Planning

part of the WYG group

# Kirklees Council

# Kirklees Leisure Needs Assessment

# Final Report

# October 2014


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# Document Control

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|---|---|
| Project: | Kirklees Leisure Needs Assessment |
| Client: | Kirklees Council |
| Job Number: | A079305 |
| File Origin: | T:\Job Files - Manchester\A079305 - Kirklees Retail Study\Reports\Leisure\Kirklees Leisure Study October 2014 FINAL.doc |

## Contents Page

# 1.0 Introduction

## Purpose

1.01 WYG Planning ('WYG') was commissioned by Kirklees Council ('the Council') in April 2014 to provide an assessment of Kirklees District's future leisure needs in order to supplement the findings of the Retail Capacity Study for Kirklees District, which reported in February 2014. The purpose of this Leisure Needs Assessment is to consider how Kirklees' existing leisure provision will meet the needs of the District in the period to 2028 and to identify how any identified additional needs could be met.

1.02 The recent Retail Study was based upon new empirical research, including the undertaking of a survey of 1,000 households in order to determine respondents' shopping and leisure habits. Accordingly, the household survey provides a detailed picture of the locations that residents of the defined Study Area look to in order to meet their leisure needs. The survey is therefore important in identifying patterns of travel and qualitative deficiencies in the existing leisure provision where it is evident that residents are required to travel to visit certain types of facility. However, we do not consider that future commercial leisure needs can be 'modelled' in the same manner as quantitative retail need, i.e. by identifying increases in available expenditure and then estimating the quantum of additional floorspace that would need to be brought forward to meet such an expenditure surplus.

1.03 Instead, we consider that a more appropriate approach is to consider Kirklees' existing provision against accepted sector 'benchmarks' in order to ascertain whether there are any shortfalls in respect of existing facilities. The sectors for which reliable data is available in order to judge the appropriateness of provision comprise bingo, cinema, gyms and leisure centres, and ten pen bowling. These are generally the sectors which require the type of larger premises for which sites may need to be identified through the development plan process. Uses such as bars and restaurants typically require smaller units, which the market is generally able to deliver through the redevelopment of land and buildings of a more modest scale. Indeed, the fact that some such uses benefit from permitted development rights in respect of change of use[1], means that the exact supply of such facilities is not precisely controlled by the planning process.

[1] To provide a single example, the Town and Country Planning (General Permitted Development) Order 1995 (as amended) provides for the change of use from Use Class A4 (drinking establishments) to Use Classes A3 (food and drink), A2 (financial and professional services) and A1 (shops) through permitted development rights without the need for a planning application

1.04 This Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline evidence which may assist in the determination of planning applications for leisure development.

## Structure of Report

1.05 The report is structured as follows:

- Section 2 provides an assessment of existing patterns of travel to access leisure facilities and the market share secured, by sector, by facilities in the District's town centres;
- Section 3 provides an assessment of the current level of commercial leisure provision by sector and compares with the anticipated level of supply based on national average benchmark levels of provision; and
- Section 4 sets out our overall conclusions in respect of Kirklees' future leisure needs.

# 2.0 Existing Kirklees Market Share by Leisure Sector

## Household Survey

2.01 In March 2013, a survey of 1,000 households was undertaken by NEMS Market Research Limited within the defined Study Area, which comprises ten separate zones and which is broadly reflective of the Kirklees District administrative boundary. However, as it is accepted that adjacent and accessible parts of Bradford, Calderdale, Leeds and Wakefield authority areas may look to Kirklees to meet some of their shopping and leisure needs, the Study Area extends beyond Kirklees to the north, west and east.

2.02 The defined catchment has been broken down into ten survey zones on a geographic basis, in a manner which seeks to allow for the consideration of the market share secured by the District's six town centres[2] for various leisure activities. Zone 1 is focused around Huddersfield town centre, Zone 4 contains Cleckheaton and Heckmondwike, Zone 7 contains Holmfirth, Zone 8 contains Dewsbury, and Zone 9 contains Batley. The zones have been defined according to postcode sector geography to assist in the collection of data for the purposes of a telephone based household survey, rather than necessarily representing catchment areas for particular types of leisure facility.

2.03 The questions and full tabulation of results from the household survey are provided at Appendix 1. Table 2.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 2. Appendix 3 provides detailed maps of the postcode sectors which comprise each zone.

[2] These being Batley, Cleckheaton, Dewsbury, Heckmondwike, Holmfirth and Huddersfield

**Table 2.1: Postcodes by Survey Zone**

| Survey Zone | Postcode Sectors |
|---|---|
| Zone 1 | HD 1 1, HD 1 2, HD 1 3, HD 1 4, HD 1 5, HD 1 6, HD 4 5, HD 4 6, HD 4 7 |
| Zone 2 | HD 2 1, HD 2 2, HD 5 0, HD 5 8, HD 5 9 |
| Zone 3 | HD 6 1, HD 6 2, HD 6 3, HD 6 4, HX 4 0, HX 4 8, HX 4 9, HX 5 0, HX 5 9 |
| Zone 4 | BD19 3, BD19 4, BD19 5, BD19 6, WF14 0, WF14 8, WF14 9, WF15 6, WF15 7, WF15 8, WF16 0, WF16 9 |
| Zone 5 | HD 3 3, HD 3 4, HD 7 4, HD 7 5, HD 7 6 |
| Zone 6 | HD 8 0, HD 8 8, HD 8 9, WF 4 4 |
| Zone 7 | HD 9 1, HD 9 2, HD 9 3, HD 9 4, HD 9 5, HD 9 6, HD 9 7 |
| Zone 8 | WF12 0, WF12 7, WF12 8, WF12 9, WF13 1, WF13 2, WF13 3, WF13 4 |
| Zone 9 | WF17 0, WF17 5, WF17 6, WF17 7, WF17 8, WF17 9 |
| Zone 10 | BD 4 0, BD 4 6, BD 4 9, BD11 1, BD11 2, BD12 0, BD12 7, BD12 8, BD12 9, LS27 0, LS27 7, LS27 8, LS27 9, WF 2 0, WF 3 1, WF 3 2, WF 5 0, WF 5 8, WF 5 9 |

2.04 Questions 37 to 47 of the household survey relate to leisure activities and the habits of the Study Area's residents. The questions which are of principal relevance to our consideration of leisure needs are as follows:

- Q.37 – Which leisure activities do you participate in?
- Q.38 – Which centre/facility did you last visit for indoor sports or health and fitness activity?
- Q.39 – Which centre/facility did you last visit to go to the cinema?
- Q.40 – Which centre/facility did you last visit to go to a restaurant?
- Q.41 – Which centre/facility did you last visit to go to bars, pubs and nightclubs?
- Q.42 – Which centre/facility did you last visit to go ten-pin bowling?
- Q.43 – Which centre/facility did you last visit for bingo?
- Q.44 – Which centre/facility did you last visit for art/culture activities (i.e. to visit theatres, galleries and museums)?
- Q.47 – Which leisure facilities would you like to see more of in the Kirklees area?

2.05 Our below commentary considers interviewees' responses to the above questions, in order to assess patterns of travel to access leisure facilities and residents' general satisfaction with the existing level of provision.

## Participation in Leisure Activities

2.06 Table 2.2 indicates that participation rates are broadly similar for most leisure activities across the 10 zones of the Study Area. The most popular single activity is to visit restaurants, which 70.4% of Study Area respondents indicated they do on at least an occasional basis, followed then by visiting pubs and bars (50.9% of respondents), the cinema (50.6% of respondents), and then theatres and concert halls (45.2% of respondents). Less popular activities include visiting nightclubs, bingo halls and social clubs.

2.07 The survey does not suggest that those in more peripheral and rural zones encounter particular difficulties in accessing leisure facilities. Indeed, we note that Zones 6 and 7 (respectively to the east and to the west of Huddersfield) benefit from participation rates that are higher than the Study Area average for most leisure activities.

2.08 The zone for which the recorded participation rate was most frequently below the Study Area average is Zone 8, which is situated around Dewsbury. Zone 8 has the lowest participation rate in terms of visits to health and fitness facilities, pubs and bars, and museums and galleries. It also secured the lowest rate of participation in running, cycling and outdoor activities, and had the highest proportion of respondents who stated that they did not participate in any leisure activities.

**Table 2.2: Participation in Leisure Activities**

| Activity | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Health and Fitness | 23.9 | 15.6 | 19.0 | 22.3 | 26.6 | 26.5 | 25.1 | 6.5 | 16.8 | 19.2 | 19.7 |
| Leisure Centre Activities | 20.5 | 9.6 | 12.9 | 26.8 | 27.3 | 24.5 | 17.9 | 18.0 | 20.4 | 20.5 | 20.0 |
| Cinema | 49.8 | 51.9 | 49.6 | 48.5 | 42.8 | 57.8 | 56.3 | 47.0 | 51.2 | 52.8 | 50.6 |
| Restaurant | 71.0 | 69.2 | 73.3 | 67.0 | 68.7 | 69.8 | 73.7 | 69.5 | 71.5 | 71.7 | 70.4 |
| Pubs and Bars | 47.3 | 45.5 | 53.3 | 43.2 | 57.9 | 55.2 | 55.7 | 39.1 | 47.2 | 59.0 | 50.9 |
| Nightclub | 2.0 | 1.2 | 4.3 | 5.2 | 4.5 | 7.7 | 2.3 | 5.7 | 9.7 | 4.5 | 4.6 |
| Social Club | 15.5 | 7.2 | 10.7 | 8.0 | 9.5 | 12.9 | 9.4 | 11.6 | 26.1 | 11.9 | 11.9 |
| Ten Pin Bowling | 15.3 | 11.9 | 20.0 | 24.7 | 18.1 | 20.2 | 13.9 | 20.1 | 16.3 | 19.7 | 18.5 |
| Bingo | 9.5 | 10.8 | 6.7 | 1.2 | 5.8 | 5.4 | 2.1 | 3.7 | 5.4 | 9.9 | 6.6 |
| Theatre and Concert Hall | 45.6 | 35.6 | 50.6 | 42.4 | 41.0 | 49.5 | 53.3 | 36.0 | 42.0 | 52.3 | 45.2 |
| Museum and Galleries | 30.1 | 26.2 | 29.8 | 33.9 | 29.8 | 40.9 | 42.1 | 25.9 | 37.6 | 35.3 | 32.8 |
| Running/Cycling/Outdoor Activities | 16.5 | 21.1 | 27.3 | 32.8 | 20.0 | 25.9 | 27.2 | 13.2 | 29.5 | 28.6 | 24.6 |
| None Mentioned | 6.1 | 9.5 | 13.3 | 11.1 | 11.9 | 5.2 | 11.9 | 14.3 | 9.6 | 11.3 | 10.7 |

Source: Question 37 of Household Survey, Appendix 1

## Indoor Sports and Health and Fitness

2.09 The Study Area covers a wide area and accommodates a range of health and fitness facilities. Accordingly, many zones manage to retain more than half of all trips to indoor sports and health and fitness facilities which originate within the zone. This is the case in Zones 1, 3, 4, 7, 8 and 9. Where trips to such facilities are not undertaken within the zone they originate, they almost always take place within an adjacent zone. Accordingly, the patterns of travel to access such facilities do not suggest a particular qualitative deficiency within any one part of the Study Area. These patterns are set out below by Table 2.3. The Study Area retains 83.0% of all trips to access indoor sports and health and fitness facilities which originate within the Study Area.

**Table 2.3: Study Area Market Share for Indoor Sports and Health and Fitness**

| Zone | Destination | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Huddersfield Sports Centre | 12.3 | 4.0 | 0.0 | 0.0 | 11.8 | 6.2 | 17.7 | 0.0 | 0.0 | 0.0 | 4.5 |
| | Stadium Health & Fitness Complex. Huddersfield | 8.2 | 5.0 | 0.0 | 0.0 | 7.5 | 2.7 | 4.4 | 0.0 | 0.0 | 0.0 | 2.6 |
| | Other, Zone 1 | 48.3 | 17.8 | 0.0 | 3.8 | 13.7 | 5.7 | 7.1 | 0.0 | 0.0 | 0.0 | 9.1 |
| 2. | Total Fitness, Huddersfield | 13.3 | 30.1 | 0.0 | 0.0 | 0.0 | 16.6 | 0.0 | 0.0 | 0.0 | 0.0 | 5.2 |
| | Other, Zone 2 | 2.2 | 12.6 | 0.0 | 3.8 | 11.9 | 3.9 | 0.0 | 0.0 | 2.4 | 0.0 | 3.5 |
| 3. | Brighouse Swimming & Fitness | 0.0 | 14.5 | 32.5 | 5.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.9 |
| | Other, Zone 3 | 0.0 | 0.0 | 19.6 | 2.2 | 3.3 | 0.0 | 2.6 | 0.0 | 0.0 | 4.3 | 3.1 |
| 4. | Spenborough Pool Fitness | 0.0 | 0.0 | 0.0 | 17.6 | 0.0 | 0.0 | 0.0 | 8.7 | 4.8 | 0.0 | 3.1 |
| | Other, Zone 4 | 0.0 | 0.0 | 3.1 | 41.9 | 0.0 | 0.0 | 0.0 | 0.0 | 6.8 | 5.4 | 7.1 |
| 5. | Colne Valley Leisure | 4.7 | 0.0 | 0.0 | 0.0 | 24.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.3 |
| | Other, Zone 5 | 6.0 | 3.5 | 0.0 | 0.0 | 18.5 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.0 |
| 6. | Scissett Baths | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 19.2 | 0.0 | 0.0 | 0.0 | 0.0 | 2.0 |
| | Other, Zone 6 | 2.5 | 0.0 | 0.0 | 0.0 | 0.0 | 11.6 | 0.0 | 0.0 | 0.0 | 0.0 | 1.5 |
| 7. | Holmfirth Pool | 0.0 | 0.0 | 0.0 | 0.0 | 1.9 | 2.7 | 35.4 | 0.0 | 0.0 | 0.0 | 2.4 |
| | Other, Zone 7 | 2.5 | 4.0 | 0.0 | 0.0 | 0.0 | 1.6 | 21.8 | 0.0 | 0.0 | 0.0 | 1.8 |
| 8. | Dewsbury Sports Centre | 0.0 | 5.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 48.9 | 12.4 | 0.0 | 4.6 |
| | Other, Zone 8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 0.0 | 0.0 | 0.2 |
| 9. | Batley Baths & Recreation | 0.0 | 0.0 | 0.0 | 8.1 | 0.0 | 0.0 | 0.0 | 10.1 | 9.2 | 0.0 | 2.3 |
| | Batley Sports & Tennis | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 33.7 | 2.5 | 3.2 |
| | DW Fitness, Batley | 0.0 | 0.0 | 5.2 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 8.3 | 6.8 | 2.7 |
| | Other, Zone 9 | 0.0 | 0.0 | 0.0 | 2.2 | 0.0 | 0.0 | 0.0 | 3.5 | 13.6 | 6.8 | 3.0 |
| 10. | Morley Leisure Centre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 8.7 | 26.1 | 6.5 |
| | Other, Zone 10 | 0.0 | 0.0 | 0.0 | 3.8 | 0.0 | 0.0 | 0.0 | 6.0 | 0.0 | 15.8 | 4.5 |
| OSA | Metrodome, Barnsley | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 22.9 | 4.4 | 0.0 | 0.0 | 0.0 | 2.6 |
| | Other, Outside Study Area | 0.0 | 3.5 | 39.7 | 11.0 | 6.9 | 7.0 | 6.4 | 12.1 | 0.0 | 32.2 | 14.3 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 38 of Household Survey, Appendix 1
Notes: 'OSA' refers to facilities which are outside of Study Area. For this sector, given the range of responses provided, we only identify specific destinations where their overall market share is 2.0% or greater

2.10 Facilities in Zones 1 and 2 (which are clustered around Huddersfield) together attract almost a quarter (24.9%) of trips to indoor sports and fitness facilities which originate within the Study Area. However, it is evident that each zone contains facilities that are well used, with even Zone 6, which attracts the lowest share of such trips, securing a market share of 3.5%. This is not wholly unexpected given that Zone 6 is largely rural in character and has the second lowest population of the 10 zones.

2.11 The most popular individual indoor sports and fitness facility in the Study Area is Morley Leisure Centre at Queensway in Morley (which attracts 6.5% of all trips originating within the Study Area to such facilities), followed then by the Total Fitness at Wakefield Road in Huddersfield (5.2% of trips), then by Dewsbury Sports Centre at Longcauseway in Dewsbury (4.6% of trips), and then by Huddersfield Sports Centre at Southgate in Huddersfield (4.5%). It should be noted that the existing Huddersfield Sports Centre is approaching the end of its lifespan and is to be replaced by a new facility at the Spring Grove car park site to the south west of Huddersfield town centre. The facility will provide: three swimming pools, including a small family fun pool; a large multi-purpose sports hall; a smaller sports hall; a climbing facility; squash courts; a fitness suite; and a dance studio (amongst other attractions). The new sports centre is scheduled to open in 2015.

2.12 We also note that in January 2014, subsequent to the undertaking of the household survey, the University of Huddersfield opened its new Student Central building which accommodates a new eight court sports hall, 80 space fitness suite, two squash courts and dance studios. The facility caters for student and staff who would potentially use other facilities if none were available on campus.

## Cinema

2.13 There are three separate cinemas operating in the Study Area, namely: the Huddersfield Odeon (adjacent to the John Smith's Stadium to the north east of the town centre); the Batley Showcase (adjacent to junction 27 of the M62); and the Rex Cinema at Elland (off Victoria Road and in the Calderdale authority area). The Odeon and Showcase are both relatively modern multiplex facilities, which respectively provide nine screens and 16 screens. The Rex is a refurbished, single screen cinema. Beyond the Study Area, there are additional multiplexes at Bradford, Halifax and Wakefield.

2.14 The differing scale of provision is reflected in the household survey results, which indicate that the Huddersfield Odeon and Batley Showcase each attract more than a third of all cinema trips. Table 2.4 indicates that the Batley Showcase is, by a short distance, the single most popular cinema in the Study Area, attracting 36.8% of all trips to the cinema which originate within the Study Area. As would be expected, the Huddersfield Odeon is the dominant cinema for the south and east of the

Study Area, and the Batley Showcase is dominant in the north and west. The Rex Cinema attracts a small number of visitors from across a relatively wide area, reflecting the fact that it offers a different experience which will appeal to certain cinemagoers.

2.15 Table 2.4 indicates that cinemas outside but in relatively close proximity to the Study Area make a contribution to meeting the needs of residents of the Study Area, with the Wakefield Cineworld attracting more than one in every ten trips to the cinema which originate from within the Study Area. The Study Area retains 77.1% of all trips to cinemas which originate within the Study Area, which is reflective of the fact that certain zones at the periphery of the Study Area offer good access to the cinemas in neighbouring authority areas.

**Table 2.4: Study Area Market Share for Cinema Visits**

| Zone | Cinema Facility | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Odeon, Huddersfield | 78.4 | 74.6 | 35.8 | 21.0 | 79.1 | 48.7 | 83.2 | 6.4 | 1.4 | 0.0 | 36.3 |
| 3. | Rex, Elland | 8.2 | 7.0 | 22.7 | 0.0 | 5.2 | 1.8 | 2.3 | 0.0 | 0.0 | 0.0 | 4.1 |
| 9. | Showcase, Batley | 2.2 | 7.2 | 6.3 | 71.6 | 9.7 | 6.0 | 1.9 | 55.2 | 90.0 | 64.3 | 36.8 |
| OSA | Cineworld, Wakefield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 34.5 | 0.0 | 27.8 | 1.4 | 21.8 | 10.3 |
| | Vue, Halifax | 4.1 | 1.6 | 29.9 | 0.0 | 4.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.4 |
| | Cineworld, Bradford | 3.7 | 2.4 | 5.3 | 1.5 | 0.0 | 0.0 | 0.0 | 0.0 | 3.5 | 3.9 | 2.3 |
| | Other, Outside Study Area | 3.4 | 7.1 | 0.0 | 5.9 | 1.7 | 9.0 | 12.6 | 10.6 | 3.5 | 10.1 | 6.8 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 39 of Household Survey, Appendix 1
Note: 'OSA' refers to facilities which are outside of Study Area

## Restaurants

2.16 As we would expect, a substantial proportion of trips to restaurants are undertaken in the same zone from which they originate. The principal exception to this is Zone 2, which attracts a very limited market share of restaurant visits from within the zone itself and from the wider area. Restaurants in Zone 2 attract just 0.7% of all such trips which originate from within the Study Area.

2.17 As Table 2.5 indicates, Huddersfield is the single most popular destination to visit to eat at a restaurant, attracting a market share of 18.4% of all such trips. Not unexpectedly, large towns and cities just outside the Study Area (namely Bradford, Halifax, Leeds and Wakefield) also attract a significant number of visits to restaurants, which is reflective of the fact that such destinations accommodate the type of establishments which may prompt customers to travel some distance. Some visits to restaurants in larger towns and cities will also be combined with shopping and visits to other leisure facilities as part of a day out.

2.18 The Study Area retains 68.5% of all trips to restaurants which originate within the Study Area. In addition to reflecting the accessibility of restaurants in settlements just outside the Study Area, this retention rate is also reflective of our methodology and the wording of the household survey which asks respondents where they last travelled to access particular types of leisure activity. In the case of restaurants, it is notable that a wide variety of destinations outside the Study Area are identified as being the subject of a visit, which is attributable to the fact that, for some respondents, their last trip may be as part of a holiday or to visit relatives who live outside the area. Accordingly, the retention rate should be viewed in this context.

**Table 2.5: Study Area Market Share for Restaurant Visits**

| Zone | Destination | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Huddersfield | 42.2 | 50.5 | 14.1 | 5.2 | 39.7 | 29.6 | 24.5 | 3.2 | 3.6 | 0.0 | 18.4 |
| | Other, Zone 1 | 6.4 | 1.6 | 0.0 | 0.0 | 2.8 | 0.0 | 1.8 | 0.0 | 0.0 | 0.0 | 1.1 |
| 2. | All destinations, Zone 2 | 4.4 | 3.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.7 |
| 3. | Brighouse | 0.0 | 1.2 | 16.7 | 1.7 | 1.9 | 0.0 | 1.1 | 0.0 | 0.0 | 1.3 | 2.3 |
| | Other, Zone 3 | 0.0 | 1.2 | 10.3 | 2.5 | 1.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.4 |
| 4. | Cleckheaton | 0.0 | 0.0 | 1.2 | 17.2 | 0.0 | 0.0 | 0.0 | 0.0 | 3.6 | 3.6 | 3.1 |
| | Other, Zone 4 | 0.0 | 1.6 | 1.2 | 21.0 | 0.0 | 2.4 | 0.0 | 2.4 | 2.2 | 2.8 | 3.7 |
| 5. | All destinations, Zone 5 | 3.6 | 4.3 | 1.5 | 0.0 | 36.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 4.3 |
| 6. | All destinations, Zone 6 | 6.9 | 3.9 | 0.0 | 0.0 | 0.0 | 33.9 | 1.5 | 0.0 | 0.0 | 1.3 | 3.8 |
| 7. | Holmfirth | 3.9 | 0.0 | 0.0 | 0.0 | 2.4 | 5.3 | 44.6 | 0.0 | 0.0 | 0.0 | 3.5 |
| | Other, Zone 7 | 7.5 | 1.1 | 0.0 | 0.0 | 2.7 | 1.2 | 14.0 | 0.0 | 0.0 | 0.0 | 1.9 |
| 8. | Dewsbury | 0.0 | 0.0 | 0.0 | 1.2 | 0.0 | 0.0 | 0.0 | 16.3 | 1.2 | 0.0 | 1.7 |
| 9. | Batley | 1.1 | 0.0 | 0.0 | 13.4 | 0.0 | 0.0 | 0.0 | 11.4 | 19.9 | 1.2 | 4.3 |
| | Birstall | 4.0 | 0.0 | 1.1 | 11.8 | 2.7 | 0.0 | 0.0 | 4.9 | 11.9 | 4.8 | 4.4 |
| | Birstall Shopping Park | 0.0 | 0.0 | 1.1 | 8.9 | 0.0 | 1.2 | 0.0 | 5.3 | 15.4 | 10.3 | 5.1 |
| 10. | Drighlington | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 9.6 | 2.2 |
| | Morley | 0.0 | 1.2 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.4 | 2.1 | 11.7 | 3.2 |
| | Other, Zone 10 | 0.0 | 0.0 | 0.0 | 2.5 | 0.0 | 1.1 | 0.0 | 2.0 | 1.0 | 12.0 | 3.3 |
| OSA | Leeds | 0.0 | 2.7 | 7.6 | 7.9 | 1.1 | 6.7 | 2.9 | 12.9 | 11.8 | 5.7 | 5.9 |
| | Wakefield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.5 | 0.0 | 15.7 | 6.3 | 12.3 | 5.2 |
| | Bradford | 10.3 | 7.0 | 1.2 | 0.0 | 0.0 | 0.0 | 0.0 | 7.3 | 12.1 | 4.3 | 4.3 |
| | Halifax | 0.0 | 2.5 | 25.4 | 1.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.6 |
| | Other, Outside Study Area | 9.7 | 18.0 | 18.5 | 5.6 | 8.9 | 12.1 | 9.5 | 15.3 | 9.0 | 19.1 | 13.5 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 40 of Household Survey, Appendix 1
Notes: 'OSA' refers to facilities which are outside of Study Area. For this sector, given the range of responses provided, we only identify specific destinations where their overall market share is 2.0% or greater (except where destination is the only response provided in a particular zone

## Bars, Pubs and Nightclubs

2.19 Relatively similar patterns of travel are evident when considering the market share of visits to bars, pubs and nightclubs claimed by facilities within the Study Area. Once again, it is evident that a significant proportion of respondents like to visit local facilities, but also find occasion to visit the different type of drinking establishments which are likely to be found in larger centres. As Table 2.6 demonstrates, a wide variety of locations are visited to sample bars, pubs and nightclubs, but the larger towns and cities retain strong market shares.

**Table 2.6: Study Area Market Share for Bar, Pub and Nightclub Visits**

| Zone | Destination | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Huddersfield | 59.6 | 53.8 | 11.5 | 2.8 | 51.8 | 37.4 | 14.5 | 4.3 | 1.4 | 0.0 | 20.9 |
| | Other, Zone 1 | 16.1 | 0.0 | 0.0 | 0.0 | 3.2 | 0.0 | 2.6 | 0.0 | 0.0 | 0.0 | 1.9 |
| 2. | All destinations, Zone 2 | 4.4 | 9.5 | 0.0 | 0.0 | 0.0 | 2.8 | 4.5 | 0.0 | 0.0 | 0.0 | 1.8 |
| 3. | Brighouse | 0.0 | 0.0 | 20.8 | 1.9 | 2.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.1 |
| | Other, Zone 3 | 1.7 | 0.0 | 20.6 | 1.9 | 1.4 | 0.0 | 0.0 | 0.0 | 1.4 | 0.0 | 2.3 |
| 4. | Cleckheaton | 0.0 | 0.0 | 0.0 | 25.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.6 | 3.0 | 3.3 |
| | Mirfield | 0.0 | 1.7 | 0.0 | 21.4 | 0.0 | 0.0 | 0.0 | 5.9 | 0.0 | 0.0 | 2.7 |
| | Other, Zone 4 | 0.0 | 0.0 | 0.0 | 25.7 | 0.0 | 0.0 | 0.0 | 0.0 | 3.9 | 0.0 | 2.7 |
| 5. | All destinations, Zone 5 | 3.3 | 2.2 | 0.0 | 0.0 | 31.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 3.8 |
| 6. | All destinations, Zone 6 | 3.5 | 7.7 | 0.0 | 0.0 | 0.0 | 45.1 | 1.3 | 0.0 | 0.0 | 0.0 | 4.5 |
| 7. | Holmfirth | 5.5 | 0.0 | 0.0 | 0.0 | 1.4 | 0.0 | 49.1 | 0.0 | 0.0 | 0.0 | 3.6 |
| | Other, Zone 7 | 3.5 | 0.0 | 0.0 | 4.1 | 3.2 | 0.0 | 17.6 | 0.0 | 0.0 | 0.0 | 2.1 |
| 8. | Dewsbury | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 42.6 | 3.9 | 0.0 | 3.7 |
| | Other, Zone 8 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.5 | 0.0 | 0.0 | 0.4 |
| 9. | Batley | 0.0 | 0.0 | 0.0 | 4.5 | 0.0 | 0.0 | 0.0 | 13.4 | 29.3 | 0.0 | 3.6 |
| | Other, Zone 9 | 0.0 | 0.0 | 0.0 | 1.7 | 0.0 | 0.0 | 0.0 | 0.0 | 28.3 | 2.3 | 2.7 |
| 10. | Morley | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.5 | 4.0 | 17.6 | 4.9 |
| | Other, Zone 10 | 0.0 | 0.0 | 1.5 | 0.0 | 0.0 | 1.5 | 0.0 | 0.0 | 1.6 | 20.7 | 5.5 |
| OSA | Leeds | 0.0 | 7.7 | 8.6 | 2.8 | 3.1 | 1.3 | 5.5 | 2.9 | 16.2 | 14.0 | 7.3 |
| | Wakefield | 0.0 | 2.2 | 0.0 | 2.4 | 0.0 | 2.8 | 0.0 | 13.9 | 3.7 | 13.8 | 5.5 |
| | Bradford | 0.0 | 0.0 | 3.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 10.7 | 2.9 |
| | Other, Outside Study Area | 2.6 | 15.2 | 33.9 | 5.7 | 1.8 | 9.2 | 4.8 | 9.0 | 4.8 | 18.0 | 11.7 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 41 of Household Survey, Appendix 1
Notes: 'OSA' refers to facilities which are outside of Study Area. For this sector, given the range of responses provided, we only identify specific destinations where their overall market share is 2.0% or greater

2.20 Table 2.6 indicates that Huddersfield is by some distance the single most popular destination to visit drinking establishments for residents of the Study Area, attracting 20.9% of all such trips. Within the Study Area, the next most popular destinations are Morley (which attracts 4.9% of all trips originating within the Study Area to such facilities), followed then by Dewsbury (3.7% of trips), and then by Batley and Holmfirth (each with 3.6% of trips).

2.21 The Study Area retains 72.5% of all trips to bars, pubs and restaurants which originate within the Study Area. Outside of the Study Area, the most popular destinations for bar, pub and nightclub visits are Bradford, Leeds and Wakefield, which are reflective of the fact that such destinations are attractive locations for a 'night out'.

## Ten Pin Bowling

2.22 There is a single dedicated ten pin bowling facility operating in the Study Area, this being the UK Superbowl facility at Leeds Road, to the north east of Huddersfield town centre. UK Superbowl accommodates 14 bowling lanes together with a cafe bar, pool table and arcade games. Whilst the household survey identifies that a very limited number of respondents had participated in ten pin bowling in Mirfield and Lindley, there are no substantial permanent facilities in these locations and we assume that these trips were to occasional or more informal facilities.

2.23 Unsurprisingly, the UK Superbowl is the most popular facility for residents of the Study Area, attracting almost half of all such trips (46.0%) originating within the Study Area, followed then by facilities outside of the Study Area, namely the Hollywood Bowl at Bradford (which attracts 16.7% of all such trips), followed then by Hollywood Bowl at Leeds (9.9% of trips), then by Bowlplex at Castleford (8.6% of trips), and then by Electric Bowl at Halifax (7.7% of trips).

2.24 It is notable from Table 2.7 that the majority of trips to go ten pin bowling from the north of the Study Area (in particular, those that originate within Zones 3, 9 and 10) are undertaken at facilities outside of the Study Area. In Zone 3, the most popular facility is the Electric Bowl at Halifax (which attracts 43.8% of trips which originate in that zone). In Zone 9, the most popular destination is the Hollywood Bowl at Bradford (attracting 30.3% of trips originating within that zone) and, in Zone 10, it is the Hollywood Bowl at Leeds (attracting 33.1% of trips originating in that zone).

2.25 As a consequence of the limited provision within the Study Area and the presence of competing facilities outside, the Study Area retains a relatively modest 47.8% of all trips to go ten pin bowling which originate within the Study Area.

**Table 2.7: Study Area Market Share for Ten Pin Bowling Visits**

| Zone | Ten Pin Facility | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Superbowl, Huddersfield | 89.2 | 54.6 | 31.6 | 55.7 | 75.6 | 69.5 | 76.7 | 57.7 | 19.2 | 7.3 | 46.0 |
| 4. | Mirfield Local Centre | 0.0 | 9.3 | 0.0 | 3.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.2 |
| 5. | Lindley Local Centre | 0.0 | 0.0 | 0.0 | 0.0 | 6.3 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.6 |
| OSA | Hollywood Bowl, Bradford | 0.0 | 20.3 | 15.3 | 31.6 | 0.0 | 0.0 | 13.8 | 7.2 | 30.3 | 25.0 | 16.7 |
| | Hollywood Bowl, Leeds | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 4.3 | 27.7 | 33.1 | 9.9 |
| | Bowlplex, Castleford | 0.0 | 0.0 | 9.4 | 8.9 | 0.0 | 9.9 | 0.0 | 17.6 | 17.6 | 11.6 | 8.6 |
| | Electric Bowl, Halifax | 0.0 | 0.0 | 43.8 | 0.0 | 18.1 | 0.0 | 0.0 | 0.0 | 0.0 | 7.3 | 7.7 |
| | 1st Bowl, Leeds | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 5.2 | 11.6 | 3.1 |
| | Other, Outside Study Area | 10.8 | 15.8 | 0.0 | 0.0 | 0.0 | 20.6 | 9.5 | 13.3 | 0.0 | 4.3 | 6.2 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 42 of Household Survey, Appendix 1
Note: 'OSA' refers to facilities which are outside of Study Area

## Bingo

2.26 There are three substantial bingo halls in the Study Area, namely Mecca Bingo at St Thomas Road to the south of Huddersfield town centre, Mecca Bingo at Railway Street to the south of Dewsbury town centre and Gala Bingo at Oasby Croft, outside the A61777 Bradford ring road at the south easterly part of the Bradford conurbation. Given the location of these facilities, the northern part of the Study Area appears well provided for in terms of bingo facilities.

2.27 Given its central location, we are unsurprised that the household survey identifies Mecca Bingo at Huddersfield as the single most popular bingo hall in the Study Area, securing a market share of 42.9%. As set out below by Table 2.8, this is followed then in popularity by Mecca Bingo at Dewsbury (which attracts 17.3% of all such trips) and then by Gala Bingo at Oasby Croft (8.3% of trips). Outside of the Study Area, the most popular facilities are Gala Bingo at Bradford (9.8% of trips), followed then by Gala Bingo at Wakefield (5.8% of trips).

2.28 The Study Area retains very nearly three-quarters (74.7%) of all trips to bingo halls which originate within the Study Area.

2.29 The household survey identifies that a very limited number of respondents visited Cowersley Community Centre to play bingo, which is not a bingo hall as such and we therefore assume that these trips were to participate in occasional or more informal bingo games.

**Table 2.8: Study Area Market Share for Bingo Hall Visits**

| Zone | Bingo Facility | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Cowlersley Community Centre | 8.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.3 |
| | Mecca Bingo, Huddersfield | 91.1 | 79.1 | 27.2 | 0.0 | 100.0 | 55.9 | 59.9 | 0.0 | 0.0 | 0.0 | 42.9 |
| 6. | Darby and Joan, S'thorpe | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 15.3 | 0.0 | 0.0 | 0.0 | 0.0 | 1.0 |
| 8. | Mecca Bingo, Dewsbury | 0.0 | 9.6 | 0.0 | 100.0 | 0.0 | 0.0 | 0.0 | 80.0 | 13.5 | 26.3 | 17.3 |
| 10. | Gala Bingo, Oasby Croft | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 20.0 | 15.2 | 21.9 | 8.3 |
| | Gildersome Village Centre | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 13.8 | 3.9 |
| OSA | Gala Bingo. Bradford | 0.0 | 11.3 | 22.9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 48.7 | 10.3 | 9.8 |
| | Gala Bingo, Wakefield | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 15.3 | 0.0 | 0.0 | 0.0 | 17.4 | 5.8 |
| | Gala Bingo, Leeds | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 10.3 | 2.9 |
| | Mecca Bingo, Halifax | 0.0 | 0.0 | 34.7 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.7 |
| | Other, Outside Study Area | 0.0 | 0.0 | 15.3 | 0.0 | 0.0 | 13.6 | 40.0 | 0.0 | 22.7 | 0.0 | 4.2 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 43 of Household Survey, Appendix 1
Note: 'OSA' refers to facilities which are outside of Study Area

## Theatres, Galleries and Museums

2.30 As may be expected given their regional role, the most popular destinations for visiting arts and culture facilities (namely theatres, galleries and museums) are Leeds and then Bradford. Leeds secures 25.8% of all trips to such attractions which originate within the Study Area, Bradford secures 20.1% and Huddersfield secures 13.9%. All other locations which attract more than 2.0% of all theatre, gallery and museum visits are located outside the Study Area in neighbouring authority areas, namely Manchester (which attracts 6.4% of all such trips), Halifax (3.6% of trips) and York (2.6% of trips).

2.31 The Study Area as a whole retains 20.2% of all trips to theatres, galleries and museums which originate within the Study Area. Whilst this is by some distance the lowest market share secured for any of the leisure activities considered in the household survey, it is not considered to give particular grounds for concern given that such cultural facilities will often be the subject of relatively infrequent visits and that it is not unusual to have to travel in order to access such facilities. Moreover, those frequenting such attractions are likely to wish to visit a range of such facilities and it is therefore inevitable that higher order centres such as Leeds, Bradford and Manchester will be popular locations to visit. Indeed, it is part of the role of such centres to provide particular theatres, galleries and museums which may need to be supported by a 'critical mass' of persons.

**Table 2.9: Study Area Market Share for Arts and Culture Activities**

| Zone | Destination | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 1. | Huddersfield | 42.2 | 29.5 | 3.8 | 0.0 | 29.1 | 18.7 | 22.8 | 8.2 | 7.2 | 1.6 | 13.9 |
| 2. | Moldgreen | 0.0 | 2.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.2 |
| 3. | Brighouse | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 1.8 | 0.0 | 0.0 | 0.1 |
| 4. | All Destinations, Zone 4 | 0.0 | 0.0 | 0.0 | 3.1 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.3 |
| 5. | All Destinations, Zone 5 | 0.0 | 0.0 | 0.0 | 0.0 | 1.7 | 0.0 | 3.4 | 0.0 | 0.0 | 0.0 | 0.4 |
| 6. | West Bretton | 0.0 | 3.0 | 0.0 | 0.0 | 0.0 | 1.4 | 0.0 | 0.0 | 0.0 | 0.0 | 0.4 |
| 7. | All Destinations, Zone 7 | 4.2 | 0.0 | 0.0 | 0.0 | 2.1 | 0.0 | 8.4 | 0.0 | 0.0 | 0.0 | 1.1 |
| 8. | All Destinations, Zone 8 | 1.7 | 0.0 | 0.0 | 3.5 | 0.0 | 0.0 | 0.0 | 4.8 | 2.2 | 0.0 | 1.1 |
| 9. | Batley | 1.5 | 4.5 | 0.0 | 0.0 | 0.0 | 1.8 | 0.0 | 4.4 | 8.0 | 1.9 | 2.0 |
| | Other, Zone 9 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 6.4 | 0.0 | 0.4 |
| 10. | Morley | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 0.0 | 2.6 | 0.0 | 0.2 |
| OSA | Leeds | 16.9 | 14.2 | 9.8 | 27.1 | 17.0 | 31.6 | 24.3 | 14.8 | 23.2 | 43.9 | 25.8 |
| | Bradford | 5.9 | 12.1 | 33.6 | 25.2 | 15.1 | 11.6 | 10.7 | 23.9 | 19.0 | 27.7 | 20.1 |
| | Manchester | 7.6 | 5.6 | 7.0 | 3.1 | 8.6 | 5.2 | 4.0 | 17.1 | 5.9 | 4.3 | 6.4 |
| | Halifax | 4.2 | 1.8 | 18.9 | 6.2 | 2.5 | 1.3 | 3.1 | 0.0 | 0.0 | 1.4 | 3.6 |
| | York | 0.0 | 0.0 | 0.0 | 5.7 | 8.0 | 1.3 | 3.4 | 0.0 | 3.3 | 2.9 | 2.6 |
| | Other, Outside Study Area | 15.8 | 27.4 | 26.9 | 26.2 | 15.9 | 27.2 | 19.8 | 22.5 | 24.8 | 16.3 | 21.3 |
| **Total** | | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** | **100** |

Source: Question 44 of Household Survey, Appendix 1
Note: 'OSA' refers to facilities which are outside of Study Area

## Additional Leisure Facilities

2.32 A clear majority of respondents (67.0% across the Study Area) failed to identify any type of additional leisure facility that they would like to see more of, stating that they either 'didn't know' what additional facilities could be provided or that there weren't any.

2.33 The single type of leisure facility which respondents wished to see more of is a swimming pool (identified by 7.8% of respondents), followed by children's play facilities (5.8%), then by sports facilities (4.5%), outdoor play areas (3.0%), ice rink (2.8%), and a bowling alley (2.6%). Both the type of facility identified and the frequency of response broadly accords with our expectations and our experience in undertaking this type of research for other local planning authorities.

2.34 With regard to the perceived need for an additional swimming pool or swimming pools, we note that Kirklees already provides nine public swimming baths across the authority area, which is considered to represent a relatively comprehensive provision, and that new swimming facilities will be delivered at Spring Grove car park in Huddersfield as part of the Huddersfield Leisure Centre development which will replace the existing centre at Southgate.

2.35 We also note that the two zones which have by far the highest amount of respondents wishing to see additional swimming facilities are the relatively rural Zones 6 and 7. However, both of these zones already accommodate public swimming facilities in the form of Scisset Baths & Fitness Centre and Holmfirth Pool & Fitness Centre. In addition, Scisset Baths & Fitness Centre is current undergoing a refurbishment programme which will result in improvements to changing rooms and the poolside environment.

**Table 2.10: Leisure Facilities Which Respondents Wish to See More Of**

| Activity | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Swimming Pool | 9.1 | 7.3 | 8.2 | 3.3 | 8.4 | 14.6 | 13.2 | 3.4 | 1.8 | 10.1 | 7.8 |
| Children's Facilities | 8.2 | 1.5 | 5.4 | 9.2 | 5.3 | 7.5 | 5.5 | 5.1 | 4.8 | 5.7 | 5.8 |
| Sports Facilities | 4.1 | 5.3 | 2.3 | 9.9 | 7.4 | 3.8 | 5.7 | 0.7 | 5.8 | 2.1 | 4.5 |
| Outdoor Play Areas | 5.1 | 2.5 | 0.8 | 6.4 | 3.3 | 3.6 | 3.2 | 3.4 | 2.2 | 0.9 | 3.0 |
| Ice Rink | 6.6 | 4.8 | 4.7 | 1.2 | 5.1 | 0.0 | 2.8 | 2.0 | 1.0 | 1.6 | 2.8 |
| Bowling Alley | 2.4 | 1.8 | 1.6 | 6.5 | 0.7 | 1.8 | 2.3 | 3.2 | 5.7 | 1.3 | 2.6 |
| Leisure Centre | 4.1 | 3.6 | 0.0 | 3.4 | 3.6 | 2.7 | 4.9 | 2.0 | 2.2 | 0.0 | 2.3 |
| Theatre | 2.9 | 1.9 | 0.8 | 5.0 | 1.1 | 3.6 | 2.6 | 0.8 | 2.0 | 1.6 | 2.2 |
| Gym | 0.9 | 3.9 | 0.0 | 3.2 | 2.0 | 1.0 | 6.4 | 0.0 | 0.7 | 1.3 | 2.1 |
| None/Don't Know | 58.9 | 61.7 | 77.1 | 61.3 | 60.8 | 61.8 | 68.0 | 70.6 | 68.6 | 73.7 | 67.0 |

Source: Question 47 of Household Survey, Appendix 1

# 3.0 Need for Additional Leisure Facilities

## Introduction

3.01 As stated in Section 1 of this Study, our approach to the assessment of quantitative need in the leisure market necessarily departs from our Retail Study methodology for a number of reasons, including the fragmentation of leisure markets and the limited availability of accurate data. However, the household survey has allowed an assessment of the market share secured by facilities within the Study Area for a variety of leisure sectors. We are able to supplement this qualitative assessment of the attractiveness of the Study Area's facilities through the use of national data in respect of the typical level of provision of specific types of facilities across the UK. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future need for additional commercial leisure facilities in the District.

3.02 We consider it to be inappropriate to 'benchmark' the provision of theatres, museums and galleries as the number of such facilities will differ significantly in accordance with a wide range of variables, including the area's catchment, proximity to higher order centres and propensity to attract tourists. We do note that Kirklees does have a medium-sized theatre (the Lawrence Batley Theatre in Huddersfield), galleries, museums and a well renowned creative sector. Huddersfield residents also benefit from their relative proximity to higher order centres such as Leeds, Bradford and Manchester, and the varied cultural attractions which such centres accommodate. Notwithstanding this, the general cultural offer of a centre can clearly add to its overall attractiveness to visitors and there may well be opportunities for Kirklees to expand its creative arts offer should appropriate opportunities and funding be forthcoming.

## Estimated Study Area Population

3.03 Section 6 of the Retail Capacity Study for Kirklees District provided an estimation of the population of the Study Area at five year intervals to 2028 (i.e. at 2013, 2018, 2023 and 2028). The population within each postal code sector was calculated in the Retail Capacity Study using Experian Micromarketer G3 data (2011 estimate, which was issued in September 2012). The baseline population data takes into consideration the findings of the 2011 Census release which has then been projected forward using Experian Micromarketer G3 data (which utilises growth rates which take into account Office for National Statistics population projections and current age and gender estimates).

3.04 On this basis, the defined Study Area is estimated to contain a resident population of approximately 615,401 people at 2013 rising to 674,595 people at 2028. This represents an increase in population within the Study Area of 59,194 people (equating to an increase of 9.6%) between 2013 and 2028. In the zones which most closely correspond to the Kirklees administrative area (these being Zones 1, 2, 4, 5, 6, 7, 8 and 9), we note that the population increases from 428,102 in 2013 to 468,676 in 2028, an increase of 40,574.

3.05 Table 3.1 provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2028.

**Table 3.1: Study Area Population by Survey Zone (2013 to 2028)**

| Zone | 2013 | 2018 | 2023 | 2028 |
|---|---|---|---|---|
| 1 | 54,991 | 57,544 | 59,899 | 61,934 |
| 2 | 62,313 | 64,520 | 66,548 | 68,477 |
| 3 | 51,638 | 53,279 | 54,851 | 56,128 |
| 4 | 71,105 | 72,911 | 74,461 | 75,828 |
| 5 | 56,675 | 58,028 | 59,477 | 60,600 |
| 6 | 42,690 | 43,500 | 44,048 | 44,547 |
| 7 | 34,551 | 35,168 | 35,679 | 36,132 |
| 8 | 62,416 | 65,584 | 68,700 | 71,625 |
| 9 | 43,361 | 45,552 | 47,587 | 49,533 |
| 10 | 135,661 | 140,866 | 145,461 | 149,791 |
| **Total** | **615,401** | **636,952** | **656,711** | **674,595** |

Source: Experian Micromarketer G3 data

## Health and Fitness

3.06 Research[3] indicates that there were approximately 3,176 private health and fitness clubs operating across the UK at 2012 and approximately 2,724 public clubs. This equates to a total of 5,900 clubs across the UK. Given that the UK population at 2012 was approximately 63.7 million[4], we estimate that, at this time, there was approximately one club for every 10,797 persons.

3.07 The ten zones which comprise the Study Area have an identified estimated population of 615,401 at 2013, increasing to 674,595 at 2028. Based on the assumed benchmark identified above, we calculate that the Study Area supports around 57.0 health and fitness clubs at 2013, increasing to around 62.5 clubs at 2028.

[3] 'State of the UK Fitness Industry 2012', Leisure Database Company, June 2012
[4] As identified by the Office for National Statistics' 2012-Based National Population Projections 28 March 2014 data release

3.08 Our research has identified 30 private health and fitness clubs in the Study Area at 2013 and 20 public clubs. We suspect there may be a limited number of smaller clubs which have escaped our assessment. Accordingly, we believe that current provision is 'there or thereabouts' and that there is effectively no substantial unmet demand in the health and fitness sector at the time of reporting. However, there may be more local gaps in the market which operators will seek to fill. We also again note that the University of Huddersfield's new Student Central facility opened in January 2014 to appropriately meet the needs of University students and staff.

3.09 Based on current rates of participation, there is likely to be a modest need for additional facilities in the period to 2028. It is envisaged that the market will likely be able to facilitate the development of such facilities in appropriate locations through the development management process. However, where opportunities to provide substantial urban extensions exist, consideration may be given to the need to provide additional health and fitness facilities in proximity to such development.

**Table 3.2: Health and Fitness Centre Requirement in Kirklees Study Area**

| Year | Study Area Population | Typical Population Required to Support Centre | Potential No. of Clubs Supported by Kirklees Study Area |
|---|---|---|---|
| 2013 | 615,401 | 10,797 | 57.0 |
| 2018 | 636,952 | 10,797 | 59.0 |
| 2023 | 656,711 | 10,797 | 60.8 |
| 2028 | 674,595 | 10,797 | 62.5 |

Note: Typical population to support a health and fitness club derived from the Leisure Database Company research

## Cinema

3.10 The Study Area currently accommodates three separate cinemas, namely the Huddersfield Odeon, the Batley Showcase and the Rex Cinema at Elland. Together, the three cinemas provide a total of 26 screens.

3.11 Once again, we estimate that the Study Area has a population of 615,401 at 2013, increasing to 674,595 at 2028. BFI[5] data indicates that there were approximately 172.5 million cinema admissions in the UK in 2012. Given that the UK population at 2012 was approximately 63.7 million[6], we estimate that there were 2.7 admissions per person in 2012. The BFI also indicates that there were 3,817

[5] 'Statistical Yearbook', BFI, 2013
[6] As identified by the Office for National Statistics' 2012-Based National Population Projections 28 March 2014 data release

cinema screens across the UK at 2012, which equates to an average of 45,193 admissions to support each screen.

3.12 Applying these benchmark averages to the Kirklees Study Area, we estimate that there will be 1,661,583 cinema admissions arising from the Study Area population at 2014, increasing to 1,821,407 admissions at 2028. Based on the assumed number of visits per screen, we calculate that around 36.8 screens could be supported at 2014, increasing to 40.3 screens at 2028. Our calculations are set out below at Table 3.3.

3.13 As we set out at paragraph 2.15 of this Study, the household survey suggests that around 77.1% of trips to cinemas which originate within the Study Area are undertaken in the Study Area. Whilst we believe that this retention rate could be improved, it is evident that cinemas in the surrounding towns of Bradford, Halifax and Wakefield are able to meet some of the Study Area population's need. Accordingly, whilst the benchmarking exercise suggests that there is an effective 10.8 screen shortfall in the provision of cinema screens in the Study at 2013 (increasing to a 14.3 screen shortfall at 2028), the patterns of travel identified by the household survey are not considered to be particularly problematic or unsustainable. Accordingly, whilst the Study Area may be able to support an additional facility over the period to 2028, we would suggest that engagement with cinema operators is required to better understand their requirements and how any future requirements might be met.

**Table 3.3: Cinema Screen Requirement in Kirklees Study Area**

| Year | Study Area Population | Number of Cinema Visits Per Person | Attendance | Number of Admissions Required to Support Screen | Screens Supported by Kirklees Study Area |
|---|---|---|---|---|---|
| 2013 | 615,401 | 2.7 | 1,661,583 | 45,193 | 36.8 |
| 2018 | 636,952 | 2.7 | 1,719,770 | 45,193 | 38.1 |
| 2023 | 656,711 | 2.7 | 1,773,120 | 45,193 | 39.2 |
| 2028 | 674,595 | 2.7 | 1,821,407 | 45,193 | 40.3 |

Note: Number of cinema trips per person and number of admission per screen derived from Mintel research.

3.14 It is also relevant to note that planning permission was granted by Leeds City Council in December 2013 for a 12 screen cinema at the White Rose Shopping Centre as part of a scheme to expand the centre. White Rose Shopping Centre is located directly adjacent to Study Area Zone 10 and will therefore be able to help meet the needs of cinemagoers in this zone (and, to some extent, the needs of those in Zones 4, 8 and 9). Accordingly, the implementation of this scheme will help meet future needs arising within the Study Area.

## Ten Pin Bowling

3.15 Mintel[7] research identifies that there were 5,773 bowling lanes across the UK in 2011. We once again note that the UK population was approximately 63.3 million at 2011, equating to a bowling lane for every 10,965 persons.

3.16 We again estimate that the Study Area has a population of 615,401 at 2013, increasing to 674,595 at 2028. Table 3.4 below indicates that, based on the assumed benchmark, we calculate that around 56.1 lanes could be supported in the Study Area in 2013, increasing to 61.5 lanes at 2028. There is currently a single dedicated ten pin bowling facility operating in the Study Area, this being the UK Superbowl facility to the north east of Huddersfield town centre. UK Superbowl accommodates 14 bowling lanes. Whilst residents of the Study Area are able to access additional bowling facilities in Bradford, Castleford, Halifax and Leeds, we do consider the provision in Kirklees to be less than would reasonably be expected. This is also supported by the fact that the majority (52.2%) of trips to ten pin bowling facilities which originate within the Study Area are to destinations outside the Study Area. This too suggests a deficiency in the current provision.

3.17 In this regard, we note that outline planning permission has been granted which provides for the redevelopment of land adjacent to the River Colne and the John Smith Stadium, to the north east of Huddersfield town centre, for a major mixed-use leisure development.

3.18 The scheme is known as HD One and proposes:

- restaurants, bars and cafes;
- nightclub, music and ten pin bowling venues;
- a range of ancillary retail units;
- a hotel of up to 150 bedrooms;
- office accommodation;
- around 1,800 car parking spaces; and
- up to 140 residential apartments.

[7] 'Tenpin Bowling – UK', Mintel, November 2011

3.19 Whilst there has been a general downturn in the ten pin bowling sector in recent years, we consider that there is a genuine shortfall in provision across the Study Area and that Huddersfield, as the principal town centre in the District, is a logical focus for additional provision. Accordingly, HD One provides an opportunity to address much of the current shortfall in provision. Given HD One's status as a commitment, we again do not consider there to be a need for the Council to proactively plan for any further ten pin bowling development, but should any planning application proposal for any further facilities be forthcoming, it should once again be judged on its owns merit in accordance with relevant town centre planning policy at the time of its determination.

3.20 If further ten pin bowling facilities (beyond the provision which is to be delivered at HD One) are to be provided, then it may be beneficial if these were provided elsewhere in the District in order to help address local deficiencies and reduce the need to travel.

**Table 3.4 Ten Pin Bowling Requirement in Kirklees Study Area**

| Year | Study Area Population | Typical Population Required to Support One Ten Pin Bowling Lane | Potential Number of Lanes Supported by Kirklees Study Area |
|---|---|---|---|
| 2013 | 615,401 | 10,965 | 56.1 |
| 2018 | 636,952 | 10,965 | 58.1 |
| 2023 | 656,711 | 10,965 | 59.9 |
| 2028 | 674,595 | 10,965 | 61.5 |

Note: Typical number of persons required to support a bowling lane derived from Mintel research

## Bingo

3.21 Once again, we estimate that the ten zones which comprise the Kirklees Study Area have a total estimated population of 615,401 at 2013, increasing to 674,595 at 2028. Mintel[8] identifies that there were 461 bingo halls across the UK in 2011. Given that the UK population at 2011 was approximately 63.3 million[9], this equates to one bingo hall for every 137,310 persons. Accordingly, we estimate that the Study Area could be expected to support 4.5 bingo halls at 2013, increasing to 4.9 bingo halls at 2028. This is set out below at Table 3.5.

[8] 'Casinos and Bingo – UK', Mintel, June 2012
[9] As identified by the Office for National Statistics' 2012-Based National Population Projections 28 March 2014 data release

**Table 3.5: Bingo Hall Requirement in Kirklees Study Area**

| Year | Study Area Population | Typical Population Required to Support Bingo Hall | Potential No. of Clubs Supported by Kirklees Study Area |
|---|---|---|---|
| 2013 | 615,401 | 137,310 | 4.5 |
| 2018 | 636,952 | 137,310 | 4.6 |
| 2023 | 656,711 | 137,310 | 4.8 |
| 2028 | 674,595 | 137,310 | 4.9 |

Note: Typical population to support a bingo hall derived from Mintel research

3.22 As noted at paragraph 2.25 of this Study, there are currently three substantial bingo halls in the Study Area, namely Mecca Bingo at Huddersfield, Mecca Bingo at Dewsbury and Gala Bingo at Oasby Croft, which are supplemented by a number of additional facilities in nearby towns which are particularly well placed to serve residents of the northern and eastern part of the Study Area. Accordingly, whilst the benchmarking exercise suggests that there is at least one less bingo hall than we would envisage, this is not considered to constitute a pressing need given the geography of the wider area.

3.23 It should also be noted that the bingo market has been affected by the 2007 ban on smoking in enclosed public places and that Mintel identifies that the number of bingo clubs in the UK declined by 149 between 2007 and 2011. Given this trend, we do not consider that there will likely be any significant need to provide additional facilities in the District in the foreseeable future and do not consider it necessary for the Council to plan for additional provision. We instead recommend that, should any proposals for such development be forthcoming, they are judged on their own merits in accordance with relevant town centre planning policy at the time of an application's submission.

# 4.0 Summary and Key Findings

4.01 The household survey undertaken by NEMS Market Research Limited in March 2013 asked respondents a number of questions relating to their use of leisure facilities. From analysis of the results of the survey, we have ascertained the market share of trips to particular types of leisure facility that originate within the Study Area and are retained within the Study Area.

4.02 Ordered from highest to lowest, the identified leisure sectors secure the following market share of trips originating from within the Study Area:

- indoor sports and health and fitness facilities secure a market share of 83.0% of trips to such facilities;
- cinemas secure a market share of 77.1% of trips to such facilities;
- bingo halls secure a market share of 74.7% of trips to such facilities;
- bars, pubs and nightclubs secure a market share of 72.5% of trips to such facilities;
- restaurants secure a market share of 68.5% of trips to such facilities;
- ten pin bowling alleys secure a market share of 47.8% of trips to such facilities; and
- arts and culture facilities (i.e. theatres, galleries and museums) secure a market share of 20.2% of trips to such facilities.

4.03 We have also calculated the market share of trips to particular types of leisure facility that originate within the Study Area but which are made to destinations within the Kirklees authority area. As would be expected, given that the vast majority of the Study Area is within Kirklees, the results are broadly similar to those set out above. Again ordered from highest to lowest, the identified leisure sectors within the Kirklees authority area secure the following market share of trips originating from within the Study Area:

- indoor sports and health and fitness facilities secure a market share of 76.0% of trips to such facilities;
- cinemas secure a market share of 73.1% of trips to such facilities;
- bingo halls secure a market share of 62.4% of trips to such facilities;
- bars, pubs and nightclubs secure a market share of 58.6% of trips to such facilities;
- restaurants secure a market share of 56.0% of trips to such facilities;
- ten pin bowling alleys secure a market share of 47.8% of trips to such facilities; and

- arts and culture facilities (i.e. theatres, galleries and museums) secure a market share of 19.4% of trips to such facilities.

4.04 Clearly, there will also be a level of 'inflow' of trips which originate from outside the Study Area directed to leisure facilities inside, which, to some degree, counterbalances the 'leakage' of trips to destinations elsewhere. Accordingly, the likely level of inflow in practice is not considered to be such that it will support additional provision beyond that identified in this report.

4.05 We consider there to be a single leisure sector for which its secured market share is appreciably less than that which is evident for comparable leisure sectors, this being ten pin bowling. The single ten pin bowling facility operating in the Study Area is the UK Superbowl facility to the north east of Huddersfield town centre, which provides 14 bowling lanes. Partly as a consequence of the limited existing provision, residents of the Study Area travel to Bradford, Castleford, Halifax and Leeds to access ten pin bowling alleys.

4.06 The under-provision in respect of ten pin bowling is also evident when undertaking a benchmark assessment of the number of leisure facilities which are currently available against the expected level of provision. We have undertaken such an exercise for four sectors, namely: health and fitness; cinemas; ten pin bowling; and bingo halls.

4.07 Our benchmark analysis identifies that, at 2013, the Study Area population could support in the order of:

- 57.0 health and fitness facilities, whereas we identify 50 such facilities in the Study Area;
- 36.8 cinema screens, whereas we identify 26 screens in the Study Area;
- 56.1 ten pin bowling lanes, whereas we identify 14 lanes in the Study Area; and
- 4.5 bingo halls, whereas we identified three such facilities in the Study Area.

4.08 We once again recognise that the centres of Bradford, Halifax, Leeds and Wakefield are in close proximity to some Study Area zones and that such centres act to supplement the leisure provision within the Study Area. Accordingly, by virtue of the fact that additional facilities are available in sustainable locations, we do not consider there to be a clear need for a substantial additional number of health and fitness facilities or bingo halls in Kirklees in the period to 2028. Such facilities may well be brought forward by the market to cater for increases in demand or in population growth, or to meet any perceived localised deficiency, and we would recommend that any such proposals be judged on their own merits in accordance with relevant planning policy at the time of an application's determination.

4.09 Turning to cinemas, although the level of provision is below that which we estimate could be supported by the Study Area population, we again note that facilities in Bradford, Halifax and Wakefield contribute to meeting the Study Area's needs. In this regard, it is also relevant to again note that planning permission has been granted by Leeds City Council for a 12 screen cinema at the White Rose Shopping Centre. White Rose is located directly adjacent to the northern part of the Study Area and is therefore highly accessible to residents of Zones 4, 8, 9 and 10 via the M62 and M621, and is therefore able to contribute to meeting their needs.

4.10 Notwithstanding this, we do note that EGi[10] identifies live cinema requirements for a number of operators in Kirklees, including Cineworld, Reel Cinemas, Savoy Cinemas and Vue. Whilst we do not envisage that all of these operators would be interested in providing additional facilities should it become evident that other operators are progressing proposals, the relative paucity of Kirklees' existing cinema provision has obviously been noted by the market. Further engagement with cinema operators may help better understand the industry's assessment of the need and allow further consideration of the locations where such need could be met in an appropriate manner.

4.11 The single biggest existing deficiency relates to ten pin bowling, with the Study Area currently accommodating 14 lanes at Superbowl UK at Leeds Road in Huddersfield. This compares to the 56.1 lanes at 2013 and 61.5 lanes at 2028 which we estimate the Study Area could support. Whilst some of this requirement can once again be appropriately met at other centres in the wider area, we note that a new ten pin bowling alley is proposed as part of the HD One leisure commitment on land adjacent to the John Smith's Stadium. Clearly, the delivery of this facility will make a very significant contribution to meeting needs within this sector. We have once again reviewed EGi's existing operator requirements in this sector and note that Hollywood Bowl has a live requirement for premises in Dewsbury and Huddersfield.

[10] From a search of its database of identified operator requirements on 22 May 2014