1.1 Introduction

1.1.1 Our approach to the assessment of quantitative need in the leisure market necessarily differs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Wirral currently meets the needs of its population in relation to the restaurant and café/coffee shop, health and fitness gym, cinema, ten-pin bowling, and bingo sectors.

1.1.2 There can be limitations to survey research, particularly with regard to the sample size which can be achieved and the use of contact by home telephone only. The results should therefore be taken only as a broad indication of consumer preferences.

1.1.3 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in Wirral. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future needs.

1.1.4 In considering future commercial leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of the current market shares of the towns in Wirral, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

1.1.5 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the need for additional facilities. We assess needs for the next 10 years (to 2029) which is the minimum NPPF (2019) need period.

1.2 Participation Leisure Activities

1.2.1 Figure 1.1 examines participation rates for a range of leisure activities across Wirral. It is shown that the most popular single activity is to visit restaurants, which an average of 72% of respondents across Wirral do. This is followed by trips to the cinema (55%), visits to pubs/bars

(54%) and visits to cafes and coffee shops (53% of respondents). Less popular activities include visiting nightclubs (9%) and bingo halls (6%).

Figure 1.1: Participation in Leisure Activities by Zone (%)

Activity	Zones											
	1 – Hoylake and West Kirby	2a - Moreton	2b – Woodchurch, Upton &	3a – Liscard South	3b – New Brighton and Liscard	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Restaurant	83%	60%	72%	58%	73%	52%	70%	69%	78%	80%	83%	72%
Café / coffee shop	76%	49%	41%	46%	53%	48%	45%	68%	48%	45%	56%	53%
Gym / health & fitness	34%	12%	20%	12%	24%	11%	24%	37%	20%	29%	35%	24%
Cinema	70%	46%	55%	52%	70%	42%	52%	61%	54%	43%	57%	55%
Pub / bar	68%	50%	53%	43%	66%	36%	43%	55%	51%	55%	65%	54%
Nightclub	16%	12%	11%	9%	11%		8%	13%	6%	11%	2%	9%
Ten pin bowling	21%	17%	19%	25%	27%	14%	17%	24%	22%	17%	15%	20%
Bingo	3%	8%	8%	6%	1%	7%	10%	1%	10%	3%	5%	6%
Theatre / concert hall	67%	36%	46%	47%	49%	37%	41%	57%	47%	38%	57%	48%
Museum / art galleries	57%	37%	41%	39%	54%	31%	49%	56%	39%	31%	54%	45%
Other activities	7%	5%		1%	1%		1%		6%	1%	2%	2%
(None of These)	5%	13%	5%	24%	2%	15%	15%	4%	11%	5%	11%	10%

Source: NEMS Household Survey results
Notes: Multiple responses will mean that figures do not add up to 100%
Blank spaces indicate a zero response

1.2.2 The survey responses indicate that residents in Zone 1 (Hoylake & West Kirby) have the highest participation rates in leisure activities within Wirral. Aside from visits to Bingo halls, those in this zone have higher than average participation rates in each of the other mentioned activities, with the highest participation rates in visits to restaurants, cafes/coffee shops, cinema, pubs and bars, nightclubs, theatre/concert halls, museums/art galleries and in other non-commercial leisure activities (cycling, dog walking, golf, running or walking). Non-participation rates in Zone 1 are also lower than the average for Wirral (5% vs 10%).

1.2.3 Residents in Zones 3b (New Brighton and Liscard), 4c (Birkenhead West) and 6 (Heswall) also show higher than average participation rates in the majority of mentioned leisure activities. In study Zones 3a (Liscard South), 4a (Birkenhead North) and 4b (Birkenhead South) however, leisure participation rates are lower. Within these zones, participation rates for the majority of activities are lower than the average across Wirral, though we note that for bingo trips, participation rates are at or above average levels.

1.2.4 When respondents were asked what additional leisure facilities they would like to see more of in their area, non-commercial leisure facilities were the most common answers, as shown in Figure 1.2 below. Additional activities/facilities for children and a new swimming pool were the most popular answer (each with 8% of all responses) followed by more sports facilities in general (4%).

1.2.5 Of the commercial leisure facilities mentioned, an increase in the number of bars and pubs was the most popular request (3% of all responses) with other facilities typically receiving 1-2% of responses each.

Figure 1.2: Leisure Facilities that respondents would like to see more of, by zone

Facility	Zones											
	1 – Hoylake and West Kirby	2a - Moreton	2b – Woodchurch, Upton , Greasby	3a – Liscard South	3b – New Brighton and Liscard North	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Commercial Leisure												
Restaurants / cafés	5%			1%	3%	2%	3%	2%	5%	5%		2%
Bars / pubs	6%	4%		4%	2%	2%	2%	3%	1%	4%	1%	3%
Better shopping facilities	1%	4%	3%	2%		4%	7%	1%		6%		2%
Cinema	8%	2%	4%	1%	1%	1%	5%	1%	1%	1%	2%	2%
Concert hall / venue	5%			3%			1%	1%	1%	1%	1%	1%
Health & fitness (gym)	3%	5%			3%	3%	1%	5%	4%	1%	2%	2%
Museum / art galleries	2%	1%		1%			3%				1%	1%
Theatre	2%	1%		1%	4%	2%	1%	3%		2%	1%	2%
Bowling alley	1%					1%	1%					>1%
Ice rink		3%	2%	1%	1%		3%	2%	2%			1%
Other Leisure Facilities												
Leisure centre	2%	1%	1%	1%		2%	3%	6%		1%	1%	2%
Children's' facilities activities	8%	13%	10%	7%	8%	11%	12%	11%	5%	3%	6%	8%
More sports facilities	11%	4%	6%	1%	4%	2%	2%		3%	1%	7%	4%
Play / park facilities	8%	5%	4%	1%	8%	2%	1%	4%	1%		1%	3%
Swimming pool	9%	3%	3%	5%	12%	6%	11%	8%	12%	2%	12%	8%
More for younger people	1%	5%		4%	1%	1%	2%	7%	2%		5%	3%
Other	16%	3%	5%	4%	9%	1%	2%	8%	3%	1%	5%	5%
(None)	38%	47%	56%	63%	53%	69%	50%	42%	57%	73%	56%	54%

Source: NEMS Household Survey
Notes: Multiple responses will mean that figures do not add up to 100%

1.2.6 On average, 54% of people across the study area indicated that they would not like to see any more of the mentioned leisure facilities suggesting that broadly half of the population are generally satisfied with the current leisure provision. The lowest proportion of respondents not wanting to see any more leisure facilities are in Zone 1 (Hoylake and West Kirby) which had the highest participation rates, while Zone 5b has the highest proportion not wanting to see more leisure facilities.

1.3 Restaurant & Cafés/Coffee Shops

1.3.1 Figure 1.3 summarises the proportion of restaurant trips directed to the most popular destinations inside and outside Wirral based upon the results of the household survey. It identifies that 77% of visits made by residents across the study area are to restaurants within Wirral. Individually, Heswall Town Centre attracts the greatest proportion of these trips (13% of all trips), followed by West Kirby (8%). Together, the local centres across Wirral attract 21% of the total number of trips made, while other destinations outside of the defined centres in Wirral attract 10% of the restaurant market share.

1.3.2 Liverpool City Centre attracts the majority of visits to restaurants outside of Wirral with 22% of all trips made here. Restaurants in Chester City Centre and at Cheshire Oaks each attract 3% of trips, while other destinations outside of Wirral collectively attract 6% of trips though each of these other destinations attract no more than 1% of trips individually.

1.3.3 In terms of the town centres, Figure 1.3 shows:

- <u>Birkenhead Town Centre</u> attracts just 4% of the restaurant market share from across Wirral and retains 26% of trips from those within its immediate zone (Zone 4a – Birkenhead North). Between 1% and 9% of restaurant trips are made to the town centre from Zones 1 to 5a, with the exception of Zone 4a, while no trips are made from Zones 5b (Bebington) and 6 (Heswall).
- <u>Liscard Town Centre</u> retains 20% of the market share from Zone 3a (Liscard South) and attracts between 1-7% of trips from zones 2b (Woodchurch, Upton & Greasby), 3b (New Brighton and Liscard) and 4b (Birkenhead South). Liscard Town Centre is reasonably close to Seabank Road and Victoria Road Local Centres which attract 9% and 12% of trips from Zone 3a and while we consider that the restaurant provision in the town centre is slightly lacking, the retention rate of 20% is generally considered to be reasonable.

Figure 1.3: Study Area Market Share for Restaurant Visits

Facility	Zones											
	1 – Hoylake and West Kirby	2a – Moreton	2b – Woodchurch, Upton ,Greasby	3a – Liscard South	3b – New Brighton and Liscard North	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Birkenhead Town Centre	1%	1%	6%	4%	2%	26%	9%	5%	1%			4%
Liscard Town Centre			1%	20%	7%		1%					2%
Heswall Town Centre	6%	4%	11%	3%	4%	1%	3%	11%	4%	5%	63%	13%
Moreton Town Centre		14%										1%
West Kirby Town Centre	36%	26%	11%		1%		3%	2%	3%	2%	3%	8%
Bromborough District Centre		1%				3%	11%	1%	22%	8%		4%
Hoylake District Centre	16%	8%	10%			1%	1%	1%			1%	3%
Woodchurch Rd District Centre			2%			3%	6%	2%				1%
Local Centres	7%	14%	35%	29%	45%	27%	23%	26%	13%	11%	5%	21%
Other Inside Wirral	1%	5%	8%	19%	5%	4%	6%	17%	12%	22%	3%	10%
Marine Pt Retail & Leisure Park		1%	2%	8%	5%			1%				1%
JunctionONE Retail Park				1%								>1%
Croft Retail and Leisure Park								5%	9%			1%
Other Destinations	1%	4%	6%	9%		4%	6%	11%	3%	22%	3%	7%
Outside Study Area	**32%**	**26%**	**16%**	**26%**	**37%**	**36%**	**36%**	**35%**	**45%**	**51%**	**25%**	**33%**
Liverpool City Centre	21%	20%	13%	18%	24%	20%	20%	24%	23%	39%	14%	22%
Cheshire Oaks Designer Outlet	3%		1%	1%	1%		5%	5%	3%	5%	2%	3%
Chester City Centre	1%	1%	1%	1%	3%	6%	2%	2%	11%	3%	4%	3%
Other	8%	5%	2%	5%	8%	9%	9%	3%	8%	4%	5%	6%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

- Heswall Town Centre attracts 13% of the total restaurant market share from Wirral and retains a healthy 63% of trips from its study zone (Zone 6). Trips are made to Heswall from across Wirral and given the size of the town, we consider the restaurant provision and influence of these facilities to be very good.
- Moreton Town Centre retains 14% of restaurant trips from its zone (Zone 2a) but does not attract any trips from elsewhere. Although Moreton is small and is situated relatively close to Birkenhead, Liscard and West Kirby, the retention rate is relatively low and is reflective of the limited restaurant provision (4 restaurants) within the town centre.

- West Kirby Town Centre captures 8% of the total restaurant market share from Wirral, attracting trips from each of the survey zones apart from zones 3a (Liscard South) and 4a (Birkenhead North). From its own zone (Zone 1), West Kirby town centre retains 36% of restaurant trips, and given the size of the centre, this is considered to be generally good and indicates that there is not a material deficiency in restaurant provision here.

1.3.4 The comparatively low rate of trips made to Birkenhead Town Centre indicates that it is not an attractive destination for eating out and points to a deficiency in provision. There are opportunities in the town centre, particularly to the north at Europa Boulevard to plan for additional leisure floorspace to complement the existing leisure centre and cinema facility helping to bring further regenerative benefits to this area of Wirral.

1.3.5 Turning to cafes and coffee shops, Figure 1.4 shows that 79% of all trips from the study area are retained at cafes and coffee shops within Wirral. Birkenhead Town Centre captures the biggest market share of the café and coffee shop market across Wirral, attracting 14% of all trips made, followed by West Kirby Town Centre at 12%.

1.3.6 Figure 1.4 also shows that:

- Birkenhead Town Centre retains 55% of the café/coffee shop market share from those in Zone 4a (Birkenhead North) and captures 22% and 40% of the market share respectively from zones 4b (Birkenhead South) and 4c (Birkenhead West). The town centre also draws from the surrounding area and attracts between 3% and 10% from each of the other zones apart from Zone 3b (New Brighton and Liscard North). As the largest centre in Wirral, the influence of facilities within the town centre is to be expected, and overall, we consider the café/coffee shop provision to be adequate.
- Liscard Town Centre attracts 25% of trips from its zone (Zone 3a, Liscard South) and a limited number of trips from Zone 2a Moreton (7%), Zone 3b New Brighton and Liscard North (8%), and Zone 4a Birkenhead North (2%). Trip patterns in Liscard are clearly influenced by the proximity of the town to the local centres in New Brighton and the out of centre provision at Marine Point which attract café and coffee shop trips, and given this, we consider the town centre to be adequately provided for.

Figure 1.4: Study Area Market Share for Cafe Visits

Activity	Zones											
	1 – Hoylake and West Kirby	2a – Moreton	2b – Woodchurch, Upton ,Greasby	3a – Liscard South	3b – New Brighton and Liscard North	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Birkenhead Town Centre	3%	7%	10%	3%		55%	22%	40%	4%	7%	3%	14%
Liscard Town Centre		7%		25%	8%	2%						3%
Heswall Town Centre	1%	2%	13%			1%		5%	6%	3%	48%	8%
Moreton Town Centre		23%	12%									2%
West Kirby Town Centre	60%	9%	24%		1%	3%	8%		1%	13%	1%	12%
Bromborough Village DC					1%			3%	37%	4%		4%
Hoylake District Centre	23%	2%									3%	3%
Woodchurch Rd District Centre			3%			2%	23%	9%				4%
Local Centres	**5%**	**18%**	**23%**	**25%**	**50%**	**7%**	**13%**	**18%**	**5%**	**2%**	**18%**	**17%**
Other in Wirral		**10%**	**7%**	**16%**	**17%**	**4%**	**14%**	**10%**	**17%**	**32%**	**6%**	**11%**
Marine Pt Retail & Leisure Park				13%	15%			1%	5%			3%
JunctionONE Retail Park							3%					>1%
Croft Retail and Leisure Park		2%	7%				1%	4%	6%	2%	1%	2%
Other		8%		3%	2%	4%	10%	5%	7%	30%	5%	6%
Outside Study Area	**8%**	**21%**	**9%**	**31%**	**23%**	**26%**	**20%**	**15%**	**28%**	**39%**	**22%**	**21%**
Liverpool City Centre	6%	20%	5%	26%	22%	21%	5%	7%	8%	19%	11%	12%
Chester City Centre	1%	2%						2%	12%	10%	2%	3%
Cheshire Oaks Outlet							8%	5%		4%	1%	2%
Neston Town Centre			1%						7%			1%
Other destinations	1%		3%	5%	1%	6%	7%	2%	1%	7%	7%	3%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

- Heswall Town Centre attracts visitors to its cafes from across Wirral with trips made from each within its survey zone, apart from zones 3a (Liscard South), 3b (New Brighton and Liscard North) and 4b (Birkenhead South). From its own zone (Zone 6), Heswall retains 48% of the market share. Considering the size and function of Heswall, the café and coffee shop provision is assessed to be good.
- Moreton Town Centre retains 23% of trips from within its survey zone (Zone 2a) and attracts 12% from the adjacent zone (Zone 2b, Woodchurch, Upton & Greasby) but no other trips from elsewhere.

- West Kirby Town Centre retains a healthy 60% of café trips from its surrounding survey zone (Zone 1). The Town Centre also attracts 24% of trips from Zone 2b (Woodchurch, Upton & Greasby), 13% from Zone 5b (Bebington) and a smaller proportion of trips each from Zones 2a (Moreton), 3b (New Brighton and Liscard North), 4a (Birkenhead North), 4b (Birkenhead South), 5a (Bromborough) and 6 (Heswall). Overall, we consider this to be indicative of a very good provision within the Town Centre.

1.4 Health and Fitness

1.4.1 As identified in Figure 1.1, the household survey indicates that 24% of respondents in the Study Area visit indoor health and fitness facilities. Of the participating respondents, the main destinations mentioned are summarised in Figure 1.5.

1.4.2 Health and Fitness facilities in Wirral attract 91% of indoor health and fitness trips from within the study area, with 40% of trips retained within town, district and local centres and 51% to other out-of-centre facilities.

1.4.3 Although Birkenhead is the largest centre in Wirral, it attracts fewer overall trips (6%) than West Kirby Town Centre (15%). Notwithstanding this however, 65% of trips from Birkenhead's study zone (Zone 4a) are retained within the town centre and 32% of trips from Zone 3a (Liscard South) and a smaller proportion from Zones 1-3a, 4b, 4c and Zone 6 are made to facilities in the town centre.

1.4.4 West Kirby attracts the highest proportion of trips to indoor health & fitness facilities across Wirral at 15%, with 68% of trips being retained from its study zone (Zone 1), 36% of trips made from Zone 2a (Moreton), 27% from Zone 6 (Heswall) and 16% from Zone 2b (Woodchurch, Upton & Greasby). Relative to its size, the comparatively high number of trips made to the town centre may be due to the centrally located Concourse Leisure Centre off Grange Road that offers a swimming pool, gym, sports hall and fitness studios.

1.4.5 Out of centre facilities (listed as 'Other in Wirral' in Figure 1.5) in Wirral attract 51% of the health & fitness market share from across the borough. These facilities are spread across the Borough with a particular concentration east of New Chester Road, outside of Bromborough District Centre. Gyms at JunctionOne Retail Park and at the Croft Retail & Leisure Park are also popular destinations (5% and 4% of trips), while other facilities outside of Bebington District Centre (likely to be the nearby Council-run Oval sports centre) are also popular.

Figure 1.5: Study Area Market Share for Indoor Health & Fitness by Zone

Facility	Zones											
	1 – Hoylake and West Kirby	2a – Moreton	2b – Woodchurch, Upton ,Greasby	3a – Liscard South	3b – New Brighton and Liscard North	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Birkenhead Town Centre	2%	9%	9%	32%		65%	11%	5%			2%	6%
Liscard Town Centre					20%							2%
Heswall Town Centre	3%	8%									4%	1%
Moreton Town Centre							5%					>1%
West Kirby Town Centre	68%	36%	16%					3%			27%	15%
Bromborough District Centre							14%			2%		2%
Hoylake District Centre	3%		3%									1%
Woodchurch Rd District Centre	3%		3%			12%		3%			2%	2%
Local Centres	2%		19%	35%	38%			18%	13%	2%	3%	11%
Other in Wirral	20%	48%	50%	33%	27%	23%	71%	57%	70%	95%	37%	51%
Bromborough Out of Centre					3%		16%	7%	29%	51%	6%	12%
JunctionOne (Bidston Moss)	8%	17%	3%					9%		12%		5%
Other Prenton Out of Centre	7%	8%	9%	6%	3%	11%	2%	5%		2%	16%	6%
Croft Retail & Leisure Park							5%		23%	12%	5%	4%
Other Bebington Out of Centre						11%	46%	15%	18%	13%		10%
Other Destinations in Wirral	4%	23%	39%	27%	22%		2%	20%		5%	10%	13%
Outside Study Area					15%			14%	18%		25%	9%
Neston								11%	15%		19%	6%
Warrington Town Centre					12%			2%				1%
Ellesmere Port									3%		2%	1%
Other Destinations					3%			2%			4%	1%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.4.6 In terms of improvements to health & fitness facilities in Wirral, only 2% of all respondents across the survey areas suggested that that they would like to see more health & fitness facilities in their area which indicates that respondents are generally satisfied with the current provision. We do note however, that the 'Requirements List' suggests that at least one gym operator is seeking floorspace in Birkenhead.

1.4.7 Having regard to the small projected increase in population in Wirral, there may be a quantitative need for additional health and fitness gym facilities in the next 10 years. We have sought to quantify this likely requirement based on current rates of participation in Figure 1.6 below. In considering the requirements set out, it should be noted that a new modern conveniently located indoor health and fitness facility is likely to result in some new gym members and in turn an uplift in participation rates.

Figure 1.6: Health and Fitness Gym Requirement in Wirral (2019-2029)

	Study Area Population Increase	Typical Population Required to Support New Gym	Study Area Custom Claimed	Potential No. of New Gyms Supported
Wirral	6,352	2,800 - 3,500	91%	1.7 - 2.1

Note: Typical population required to support new gym sourced from information published by gym operators (including company account reports/accounts)

1.4.8 The increase in population anticipated in the Study Area in the period to 2029 is anticipated to be 6,352, as noted in Figure 1.6. Applying the market share for indoor health and fitness gym facilities in Wirral (91%), this identifies potential for 5,780 new gym members within this area. Information published by a number of health and fitness operators identify that typical/average members per health and fitness gym facility ranges from 2,800 to 3,500 members and therefore based on this, there could be a requirement for between 1.7 and 2.1 new health and fitness gyms across Wirral.

1.4.9 Given the size of Birkenhead and its status as a sub-regional centre, our analysis of trip patterns suggests that there is a under provision of gym facilities in the town centre. We note that a national gym operator is currently seeking premises in the town, and opportunities should be explored to deliver this need.

1.4.10 We have not identified any particular deficit in provision elsewhere in the borough, and we note that a low proportion of respondents to the survey indicate that they would like a new gym facility in their local area. Overall, the forecast and outstanding operator requirements indicate that Wirral could potentially accommodate 1-2 additional health & fitness facilities over the next 10 years, and we recommend that this need is accommodated within Birkenhead.

1.5 Cinemas

1.5.1 The cinema provision in Wirral consists of 3 large-scale multi-screen operators and 1 smaller scale independently run drive-in facility. As shown in Figure 1.2, only 2% of respondents across the survey zones said that they would like to see more cinemas which indicates a general level of satisfaction with the existing facilities. The main existing cinemas in Wirral are as follows:

- Vue, Conway Park, Birkenhead (7 screens) – Located off Conway Street in the north of the town centre, this cinema complex provides a total of 1,756 seats. Films are shown at various times throughout the day, seven days a week.
- Odeon, The Croft Retail & Leisure Park (7 screens) – This facility cinema is located at the Croft Retail & Leisure Park on the edge of Bromborough. Accommodating a total of 1,239, the cinema operates 7-days a week.
- Light Cinema, New Brighton (8 screens) – Located within the Marine Point Leisure and Retail complex at New Brighton, this large modern facility also hosts theatre, opera, live music and ballet screenings.
- Woodside Drive-in Cinema – The Woodside is located to the east of Birkenhead Town Centre and offers an 'American Style' drive-in cinema experience. It shows classic films in an outdoor setting on Thursday to Sunday evenings.

1.5.2 As shown in Figure 1.7, approximately 87% of cinema trips across the study zones are retained within Wirral. The Light Cinema in New Brighton is the most popular facility, attracting 46% of all trips, while the Odeon at Croft Retail Park attracts 25%, the Vue cinema in Birkenhead attracts 15%, and the Woodside Drive-In Cinema attracts 1% of trips. With the exception of the Woodside Drive-In cinema, each of the other facilities attracts visits from across each study zone.

Figure 1.7: Study Area Market Share for Cinema Visits

	Zones											
Facility	**1 – Hoylake and West Kirby**	**2a – Moreton**	**2b – Woodchurch, Upton ,Greasby**	**3a – Liscard South**	**3b – New Brighton and Liscard North**	**4a – Birkenhead North**	**4b – Birkenhead South**	**4c – Birkenhead West**	**5a – Bromborough**	**5b – Bebington**	**6 – Heswall**	**Total**
Light Cinema, New Brighton	67%	74%	58%	83%	89%	21%	17%	24%	3%	13%	42%	46%
ODEON Croft Retail Park	8%	3%	14%	9%	1%	5%	39%	38%	71%	50%	24%	25%
Vue, Conway Park, Birkenhead	8%	14%	17%	6%		68%	27%	29%	3%	13%	6%	15%
Woodside Drive-In, Birkenhead			1%					4%				1%
Outside Study Area	17%	9%	10%	3%	9%	6%	16%	5%	23%	25%	28%	14%
ODEON Liverpool One	3%		3%		4%	3%	7%	2%	6%		1%	3%
Vue, Cheshire Oaks	5%	7%	6%	1%	6%	3%	8%	2%	18%	23%	24%	9%
Others	9%	2%	1%	1%			1%	1%		1%	3%	2%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.5.3 Although the Vue cinema in Birkenhead is centrally located, it is not particularly well related to the rest of the town centre as it separated by the busy A553 Conway Street and Mecca Bingo/Europa Square Car Park. The cinema has no complementary leisure uses in the locality such as restaurants and bars nearby, and the vacant land along Europa Boulevard presents an opportunity to enhance this area of the town and make the cinema more of an attractive destination.

1.5.4 In terms of the influence of cinemas outside of Wirral, the Vue at Cheshire Oaks attracts the highest proportion of trips. This large complex has a total of 16 screens including an IMAX screen and captures 9% of the market share from across Wirral with particular influence on zones 5b (Bebington) and 6 (Heswall), where 23% and 24% of trips respectively are made to the facility. The Odeon Cinema at Liverpool One shopping centre in Liverpool City Centre attracts 3% of the total market share from Wirral, capturing a small proportion (1-7%) of trips from zones 2b (Woodchurch, Upton & Greasby), 3b (New Brighton and Liscard North), 4a, 4b, 4c (Birkenhead North, South and West), 5a (Bromborough) and 6 (Heswall).

1.5.5 Global market research company Mintel estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the Study Area, we estimate that there will be 889,580 cinema admissions arising from the population at 2019, increasing to 906,730 admissions by 2029. Based on the assumed number of visits per screen, we calculate that 20.7 screens can be supported in the Study Area at 2019, increasing slightly to 21.1 screens at 2029. Our calculations are set out in Figure 1.8 below:

Figure 1.8: Cinema Screen Requirement in Study Area

Year	Study Area Population	Number of Cinema Visits Per Person	Attendance	Number of Admissions Required to Support Screen	Screens Supported
2019	329,474	2.7	889,580	42,927	20.7
2024	333,023	2.7	899,162	42,927	20.9
2029	335,826	2.7	906,730	42,927	21.1

1.5.6 Based on the current market share, our calculations shown in Figure 1.9 indicate that around 18 cinema screens could currently be supported in Wirral, increasing to around 18.4 screens at 2029. Given there are currently 22 cinema screens plus an additional drive-in cinema across Wirral, the calculated cinema screen requirement shown suggests there is not capacity for an additional facility in the study area.

Figure 1.9: Cinema Screen Requirement in Wirral

Year	Screens Supported	Study Area Custom Claimed by Wirral	No. of Screens Supported in Wirral
2019	20.7	87%	18
2024	20.9	87%	18.2
2029	21.1	87%	18.4

1.5.7 In terms of reviewing cinema requirements on a qualitative basis, having regard to the size of Wirral and existing cinema provision, we do not consider there is a need to plan for additional cinema facilities at present. We note that a new 2-screen facility is currently under construction in Hoylake as part of the Beacon Arts Village development. Once completed in 2020, we anticipate that this will meet any additional demand for cinema facilities in Wirral for the foreseeable future.

If any further proposals come forward, we recommend they are judged on their own merits in accordance with relevant town centre planning policy at the time of any application's submission.

1.6 Tenpin Bowling

1.6.1 There are currently 2 ten-pin bowling facilities in Wirral; Riverside Bowl off Marine Promenade in New Brighton, and Bromborough Bowl located to the north east of Bromborough off Bassendale Road. Figure 1.11 shows that these facilities retain 87% of all trips from across the study area, with trips made to Bromborough Bowl from each study zone, and to Riverside Bowl from each zone apart from 5a (Bromborough) and 5b (Bebington). Outside of Wirral, Lane7 bowling at Clayton Square in Liverpool and Tenpin at Cheshire Oaks together attract the remaining 13% of trips from Wirral.

Figure 1.11: Study Area Market Share for Tenpin Bowling Visits

	Zones											
Facility	**1 – Hoylake and West Kirby**	**2a – Moreton**	**2b – Woodchurch, Upton ,Greasby**	**3a – Liscard South**	**3b – New Brighton and Liscard North**	**4a – Birkenhead North**	**4b – Birkenhead South**	**4c – Birkenhead West**	**5a – Bromborough**	**5b – Bebington**	**6 – Heswall**	**Total**
Riverside Bowl, New Brighton	60%	54%	42%	83%	87%	44%	75%	52%			48%	52%
Bromborough Bowl	29%	19%	40%	17%	2%	29%	25%	48%	86%	72%	19%	35%
Outside Study Area	**11%**	**27%**	**18%**		**11%**	**27%**			**14%**	**28%**	**33%**	**13%**
Lane7, Clayton Square, L'pool	3%	23%										2%
Tenpin Cheshire Oaks	8%	4%	18%		11%	27%			14%	28%	33%	11%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.6.2 Although we note that a ten-pin bowling operator is currently looking for floorspace in Birkenhead, we do not consider that there to be an under-provision of bowling facilities in Wirral at this time.

1.6.3 As shown in Figure 1.2, less than 1% of those asked mentioned that they would like to see an additional bowling alley in their local area, and this coupled with a retention rate of 87% of bowling trips within Wirral suggests that the current provision meets the needs of the existing population. We recommend therefore, that no new facilities should be planned for but if any future proposals for such development come forward, they are judged in accordance with relevant town centre planning policy at the time of submission.

1.7 Bingo

1.7.1 There are currently 2 permanent bingo halls in Wirral; Gala Bingo in Birkenhead Town Centre, and Buzz Bingo at the Croft Retail and Leisure Park. Responses to the household survey indicate that additional bingo activities take place in several other locations within the study area too, including social clubs and community centres.

1.7.2 The household survey indicates that visiting bingo halls is undertaken by only 6% of respondents to the survey and Figure 1.12 shows that facilities in Wirral attract 86% all trips from the survey zones, and that destinations in Liverpool attract the remaining 14% of trips. Mecca Bingo in Birkenhead is the most popular destination overall, capturing 38% of the market share, followed by Buzz Bingo at 36%. Of the facilities outside of Wirral, Bongo's Bingo, which has recently moved locations in Liverpool attracts 9% of all trips, while other facilities in Liverpool attract 5%. No other trips to bingo facilities are made to facilities outside of Liverpool.

Figure 1.12: Study Area Market Share for Bingo Visits

	Zones											
Activity	**1 – Hoylake and West Kirby**	**2a – Moreton**	**2b – Woodchurch, Upton ,Greasby**	**3a – Liscard South**	**3b – New Brighton and Liscard North**	**4a – Birkenhead North**	**4b – Birkenhead South**	**4c – Birkenhead West**	**5a – Bromborough**	**5b – Bebington**	**6 – Heswall**	**Total**
Mecca Bingo Birkenhead		17%	53%	61%	100%	100%	36%	48%		79%	16%	38%
Buzz Bingo, Croft Retail Park		64%	31%				46%	52%	93%	21%		36%
Other facilities in Wirral	16%	19%	16%	26%			18%		7%			12%
Outside Study Area												
Bongo's Bingo, Liverpool	16%										84%	9%
Other Facilities in Liverpool	68%			13%								5%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.7.3 Recent research by Mintel identifies that there are around 350 bingo halls in the UK, which against the 2019 population of the UK of 67.6 million, suggests that each is supported by a catchment of 193,142 persons or thereabouts.

1.7.4 Wirral has a total estimated population of 329,474 at 2019, increasing to 335,826 at 2019. Given a market share of 86%, we estimate that the population of Wirral could theoretically support 1.5

bingo clubs at 2019, remaining at the same level in 2029. Having regard to the existing two large bingo halls, we do not consider there will be a requirement for an additional bingo facility in Wirral.

Figure 1.13: Bingo Hall Requirement in Wirral

Year	Study Area Population	Typical Population Required to Support Hall	Potential Number of Halls Supported by Study Area	Study Area Custom Claimed by Wirral	Potential No. of Halls Supported in Wirral
2019	329,474	193,142	1.7	86%	1.5
2025	333,023	193,142	1.7	86%	1.5
2029	335,826	193,142	1.7	86%	1.5

1.7.5 Accordingly, at the current time there is no demonstrable need to improve competition and choice in bingo halls in Wirral, although this will be subject to market demand from other bingo operators. Given that current trends for bingo halls show activity moving online instead of physical venues, future demand for new venues is expected to be very limited. We recommend that, if demand arises in the future, proposals for such development are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

1.8 Arts and Cultural Facilities

1.8.1 Arts and cultural activities play an important role in providing a distinct identity to places or towns, as well as being an important contributor to the local economy. Research by the Centre for Economic and Business Research (CEBR) in 2019 has quantified that for every pound of GVA generated by the arts and culture industry, an additional £1.24 of GVA is generated in the wider economy through wider indirect and induced multiplier impacts of the industry. CEBR identify that the arts and culture sector was estimated to have produced a turnover of £48 billion and was the responsible for the employment of approximately 363,713 people in the UK in 2016.

1.8.2 For the purpose of this assessment, consideration is given to the provision of museums, art facilities and theatres within Wirral and Figure 1.14 details the main cultural venues.

Figure 1.14: Main Cultural Venues in Wirral

Museums	Galleries and Theatres
• Birkenhead Priory • Fort Perch Rock • Port Sunlight Museum & Garden Village • Spaceport, Birkenhead • U-Boat Story, Birkenhead • Wirral Transport Museum & Tramway	• Williamson Art Gallery, Birkenhead • Lady Lever Art Gallery, Port Sunlight • Shore Cottage Studio • Floral Pavilion Theatre, New Brighton • Gladstone Theatre • Little Theatre, Birkenhead • West Kirby Arts Centre

1.8.3 It is also important to note towns and individual settlements can be important attractors in themselves, with facilities such as churches, cathedrals and sporting venues which add to their overall appeal to visitors.

1.8.4 The results of the household survey indicate that 45% of respondents from across the survey area visit museums and galleries. Theatres and concert venues are even more popular with some 48% of respondents visiting these venues.

1.8.5 In terms of trips made to art and cultural facilities, the household survey (Figure 1.15) indicates that 21% are made to attractions in Wirral with 79% of trips being made outside of the study area, mostly to Liverpool. Within Wirral, the Floral Pavilion Theatre is the most popular destination attracting 12% of all trips, with the Lady Lever Art Gallery in Port Sunlight the second most popular (4% of trips).

1.8.6 The popularity of Liverpool as a destination is not surprising given the easy access and proximity to Wirral and status as a nationally important cultural centre. The city has a wide choice of facilities and is a major visitor/tourist destination.

Figure 1.15: Study Area Market Share for Art/Cultural Activities (Theatres, Galleries & Museums)

Activity	Zones											
	1 – Hoylake and West Kirby	2a – Moreton	2b – Woodchurch, Upton ,Greasby	3a – Liscard South	3b – New Brighton and Liscard North	4a – Birkenhead North	4b – Birkenhead South	4c – Birkenhead West	5a – Bromborough	5b – Bebington	6 – Heswall	Total
Floral Pavilion Theatre	12%	19%	15%	15%	15%	23%	9%	6%	9%	4%	11%	12%
Lady Lever Art Gallery		1%	9%		1%	3%	16%	1%	2%	4%	5%	4%
Williamson Art Gallery		1%	1%	1%		1%	5%	4%			6%	2%
The Little Theatre			2%	8%	1%		1%			1%		1%
Gladstone Theatre				1%				2%	1%	3%		1%
Other Facilities in Wirral				1%			2%			6%		1%
Outside Study Area	88%	78%	71%	73%	84%	73%	67%	86%	88%	81%	76%	79%
Liverpool Empire	30%	21%	33%	24%	21%	17%	32%	28%	25%	31%	22%	26%
Museum of Liverpool	6%	15%	19%	5%	7%	21%	6%	10%	17%	6%	8%	10%
World Museum, Liverpool	9%	9%	7%		8%		6%	16%	7%	3%	1%	7%
Walker Art Gallery,	7%	1%	3%	9%	7%	1%	5%	4%	1%		7%	5%
L'pool Playhouse Theatre	5%			5%		4%		9%	4%	8%	1%	3%
Royal Court Theatre L'pool	3%	1%		3%	9%	6%	2%	6%	1%	11%	1%	4%
Royal L'pool Philharmonic	9%	1%	1%	1%	1%		3%	5%	3%	1%	4%	3%
Central London	8%	1%	1%	1%	4%	3%		5%	6%		3%	3%
Other	11%	27%	8%	23%	27%	20%	13%	4%	24%	21%	27%	18%

Source: NEMS Household Survey
Notes: Figures may not add due to rounding

1.8.7 Overall, having regard to the size of Wirral and its towns, the provision of arts and cultural facilities across the borough is considered to be reasonable. Demand/need for additional provision is likely to be limited due to the location of existing, more comprehensive cultural facilities in Liverpool and accordingly, we recommend therefore, that no new facilities need to be planned for, but if any future proposals for such development come forward, they are judged on their merits in accordance with relevant town centre planning policy at the time of submission. In order to maintain and improve current participation rates however, and to help increase the number of visitors to borough in general, consideration should be given to ways of further promoting existing facilities.