EXECUTIVE SUMMARY

White Young Green (WYG) was commissioned by Bradford District Council in September 2007 to undertake a comprehensive assessment of current and future capacity for retail and leisure in Bradford District. The study will inform the preparation of the Council's local development framework.

The key aims of the study were to assess the following:

- Undertake a health check of the vitality and viability of the city, town, district and local centres in accordance with advice set out in Planning Policy Statement 6 (PPS6);
- Confirm the appropriateness of or suggested amendments to the Bradford replacement Unitary Development Plan (adopted October 2007) defined city, town, district, and local centre boundaries;
- Provide a quantitative and qualitative assessment of the need (in accordance with PPS6 advice) and justification for additional retail and leisure development up to 2009, 2013 and 2018;
- Assess the potential for incorporating additional retail and leisure developments within city, town, district and local centres;
- Advise of a need to plan for expansion or contraction of the centres within Bradford district;
- Assess the 'net' leakage of retail expenditure from Bradford's catchment area to:

  a: Competing retail centres;
  b: Catalogue shopping; and
  c: Internet shopping

- Advise on the relevant retail hierarchy of Bradford District Centres within the Leeds city region context; and
- Advise on a strategy for retail and leisure development through recommendations that inform the emerging Local Development Framework.

The study includes an in-depth analysis of:

- The retail provision in the main centres within the district;
- An assessment of the extent to which the centres are meeting the retail needs of the local area population; and
- The role of centres in the local shopping network, and the sub-regional shopping hierarchy.

Market Research

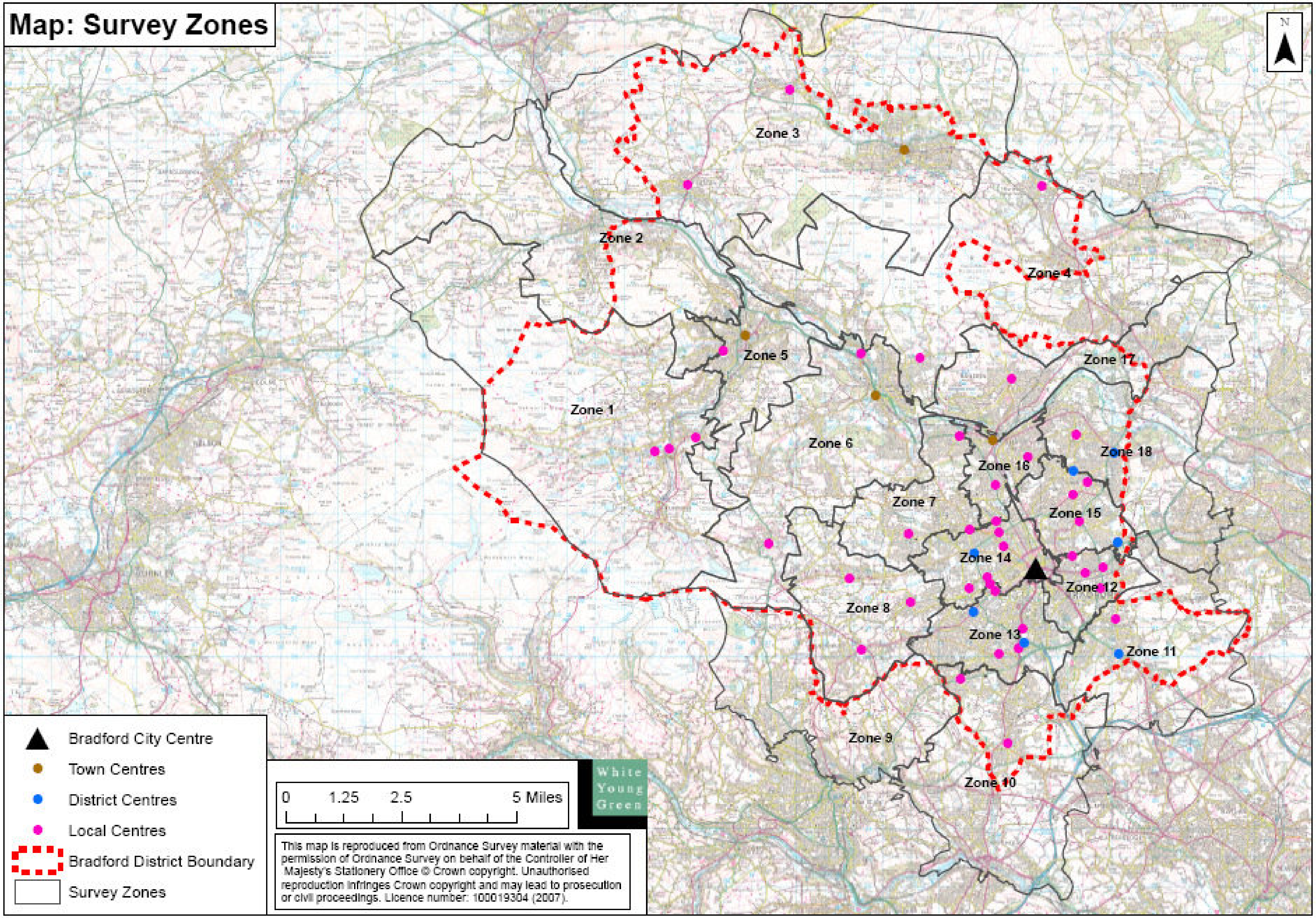
A key element of the study was to obtain a detailed understanding of the extent of the catchment of the main centres within Bradford and shopping patterns that currently exist within it. This is achieved by four strands of original market research as follows:

- A household telephone survey – which interviewed over 1,996 households within a defined study area. NEMS undertook the surveys;
- An on-street survey – which interviewed over 1,065 shoppers at the following:
  - Town Centres:
    - Bradford (259 surveys);
    - Bingley (100 surveys);
    - Ilkley (100 surveys);
    - Keighley (115 surveys); and
    - Shipley (100 surveys)
  - District Centres:
    - Girlington (65 surveys);
    - Great Horton (51 surveys);
    - Greengates (50 surveys);
    - Thornbury (56 surveys);
    - Five Lane Ends (60 surveys);
    - Mayo Avenue (50 surveys); and
    - Tong Street (59 surveys)
- A business survey – distributed to all businesses within the defined Town Centres and District Centres

Defined Study Area

The defined study area is based on postcode sectors and comprised all the administrative area of Bradford District, but it has also partially extended into neighbouring authorities of Calderdale to the West, Leeds City Council to the East, and Kirklees Council to the South. The study area is divided into 18 survey zones in order to examine shopping patterns at the local level.

Figure 4.1: Plan Indicating the Extent of the Bradford Study Area



The defined study area is identified as having a population of approximately 622,137 people (2007 estimate) and generates some £861.7m of convenience goods expenditure and £1,754.4m of comparison goods expenditure, which is forecast to increase to £1,189m and £4,393.4m respectively, by 2022. This takes into account population change and forecast retail expenditure growth. Accordingly, it is anticipated that the greatest growth in expenditure will be for comparison goods, with only a moderate increase forecast for convenience goods spending.

Vitality and Viability of Existing Centres

In accordance with PPS6, as part of this study an assessment of the health of the main centres in the district was undertaken.

Bradford City Centre was identified as being of regional significance. The defined shopping area contains 473 retail outlets which together occupy 98,730sq m of retail floorspace. The study found that a proportion of convenience provision within the City Centre was limited. Conversely, the study found that the comparison goods sector was the most significant in terms of floorspace, accounting for 53% of the total retail floorspace in the centre. In addition, the study found that the centre benefited from a significant range of civic and cultural services in and around the City Centre which added to the diversity of the city.

It is important to note that the total amount of retail floorspace in the City Centre has actually dropped by approximately 100,000sq m between the 2001 and 2007 period. This can be attributed to the demolition of a number of retail outlets in the Broadway and Petergate area to help facilitate the new and proposed Broadway Shopping Centre redevelopment.

The study found that given the historic nature of the City Centre, it was dominated by a number of small retail outlets, not necessarily conducive to modern retail practices. In addition, GOAD identified that Bradford contained an above average representation of vacant outlets, many of which were of poor quality. The high proportion of small vacant outlets indicates that these may be unsuitable to the demands of modern retailing. However, it is noted that vacancies in the City Centre have actually declined since 2001, which is a positive sign for the vitality of the centre.

The study found that despite prime Zone A rents in the City Centre being relatively high, they have remained unchanged since 2000, whilst other competing centres in the sub-region have witnessed increases in their prime Zone A rents.

Following discussions with local agents, WYG found that whilst there was strong demand for representation in the City Centre, there was a lack of suitable, high quality retail outlets to meet that demand. Local agents however, found that Bradford benefited from affordable rents, acceptable terms, a readily available workforce, and good public transport infrastructure. In addition, yields in Bradford have fallen in recent years, indicating improvements to investor confidence in the City Centre.

Bradford contains some 65% of the top 20 national high street retailers (as identified by Focus 2007). In addition to this, there is a significant demand recorded by retailers seeking representation in the City Centre where some 72 retailers sought up to 138,236sq m (gross) of new retail floorspace.

Accessibility to the City Centre is good and with the largest proportion of visitors interviewed on the In-Street Survey having arrived in the City centre by bus, mini-bus or coach. However, those that drove in to the City Centre did not encounter any difficulty in obtaining a car parking space.

In conclusion, whilst Bradford can be seen to provide a strong comparison goods offer which is also enhanced by its leisure destination, its future growth will be restricted unless new high quality large retail outlets can be brought in the City Centre. The Broadway shopping development should deliver these, although the inactivity on the site has led to a significant decline in retail floorspace that has not been replaced. Furthermore, as noted by agents, many retailers are currently refraining from investing in the centre until development is complete, which is actually stifling investment. Once the development is completed, careful management will be required to ensure that the whole of the centre benefits from the development and to ensure that the Kirkgate and Oastler Shopping Centres remain important retail destinations.

Keighley

Keighley is the second largest town in the district after Bradford and contains 76,690sq m of retail floorspace. Due to its somewhat isolated location in the North West of the district, it is a self-contained centre with a dedicated catchment. The representation of both comparison and convenience goods floorspace is above the national average, whilst retail service, leisure service and financial and business service floorspace are all below the national average.

In the convenience sector, the town is anchored by a Sainsburys foodstore on Cavendish Street and a Morrisons foodstore on Worth Way. Comparison retailers are focused on the purpose built Airedale Centre and Cavendish Retail Park. The Town Centre contains a mixture of national multiples and independent traders, and includes a permanent indoor market.

In terms of outlet sizes in Keighley, the Town Centre is dominated by small outlets, whereby 57% of total floorspace is dominated by units under 93sq m. This is compared to a national average of 39%. The proportion of vacant outlets represents 15% of the total amount, which is above the national average of 10%. However, the proportion of vacant floorspace (7%) is below the national average (9%). This demonstrates the high number of small outlets that are currently vacant which are not suitable for the requirements of modern retailers.

The study found that only half of the top 20 national high street retailers (as defined by FOCUS) are in the Town Centre. At October 2007 FOCUS found that a total of 21 requirements were recorded by retailers seeking representation in the Town Centre. In total, these collectively had a requirement for 20,026sq m of new retail floorspace.

In June 2006 prime Zone A rents in Keighley were recorded at £861 per sq m. This was found to be lower than nearby centres of Halifax and Harrogate. However, rents have increased by some 45% since 1998. Yields in the centre are falling indicating improvements to investor confidence.

Keighley is a somewhat unique centre in that it has a lower catchment base due to its distance from other competing centres. It is identified by agents that the threat of an improved retail offer in competing centres such as Bradford is likely to be minimal. The centre show signs of strong vitality and viability. However, there are a number of indicators to suggest that there are key issues which will need to be addressed in the forthcoming Local Development Framework (LDF). Consequently the key challenge for Keighley in the future will be to ensure that sufficient retail and leisure developments are brought forward which will help cater for the needs of shoppers who use the centre. Lastly, the issue of the high amount of small vacant outlets will need to be addressed.

Ilkley

Ilkley contains 37,380sq m of retail floorspace, making it the third largest retail destination in the district. Convenience retail floorspace is above the national average and this sector is anchored by a Tesco foodstore and a Booths foodstore. Comparison retail floorspace is below the national average although the study found that the town centre had an adequate supply. The centre contains a variety of specialist comparison traders which is dominated by independent traders. The proportion of retail service and financial and business service floorspace is above the national average, with the proportion of leisure service floorspace being lower than the national average.

The study found that the majority of retail outlets in Ilkley are small in nature (under 93 sq m), although these units will appeal to the independent retail sector. The study found that there are currently 18 retailers who are seeking representation in Ilkley Town Centre. This represents a combined floorspace of 11,823sq m gross.

Ilkley is well provided for in terms of its train and bus services, with regular connections to Bradford and Leeds, amongst other destinations. The centre is also well positioned to take advantage of the A65 road. A major concern identified by local traders was the inadequacy of customer car parking, which was a barrier to trading performance.

Ilkley benefits from a safe and pleasant shopping environment for pedestrians. Half of the shoppers felt that the accessibility to Ilkley was ‘better’ or ‘much better’ than the accessibility to other shopping centres. The environmental quality of the Town Centre was good, with well maintained retail units and high quality public realm.

The study found that Ilkley is clearly a healthy, vital and viable Town Centre. The high proportion of good quality independent retailers adds to the diversity and the unique range of goods and services on offer in the town. In terms of the future of the centre, the study found that it will be necessary to balance the delivery of new retail floorspace to ensure that it retains/improves its market share, whilst at the same time preserving the good quality environment and independent/specialist nature of the businesses that it currently contains.

Shipley

Shipley was found to have 38,800 sq m of retail floorspace. The Town Centre is dominated by the large-format ASDA superstore off Manor Road which offers a range of comparison and convenience goods. The centre contains a permanent indoor market, as well as an outdoor market in the Market Square. This is held three times a week. The study found that the proportion of convenience, retail service and financial and business service floorspace is above the national average, whilst the proportion of comparison and leisure service floorspace is below the national average.

Similar to other Town Centres in the district, Shipley is dominated by small outlets of less than 93 sq m. Vacancies in the Town Centre are above the national average with respect to both the proportion of floorspace and the proportion of outlets that they occupy. Many of these outlets are noted to be of poor quality, which detract from the overall quality of the environment. The study also found that vacancies in the Town Centre had actually increased between 2001 and 2006.

The centre only contains five of the top twenty national high street retailers including Boots, Woolworths, Argos, Superdrug and Wilkinsons. Yields in the centre have remained largely static over the past ten years, although they have fallen marginally from 9.5% in October 1996 to 8.5% in January 2007.

Shipley has a centrally located bus station that provides good services to the local area including Leeds, Bradford, Harrogate, and Keighley. A train station is located within close proximity of the Town Centre and provides direct services to Leeds and Bradford every thirty minutes. The Town Centre benefits from a number of car parks, although the largest of these (Ivar Way multi-storey and Manor Road), are both located adjacent to the ASDA foodstore. There is limited parking elsewhere in the town centre which is well linked to the other retailing core. Pedestrian movement around the centre is not impeded; however bus movements can create some conflict

Shipley is predominantly a destination for convenience shopping, dominated by the ASDA and retail markets. The centre does show signs of vitality and viability, however there are a number of indicators which suggest that the centre is vulnerable. The future of the Town Centre will require diversification of Town Centre retail uses and make it a more attractive retail destination. This could be achieved by improving the quality of the indoor markets to provide a quality retail offer, and also environmental improvements would help to increase the attractiveness of the Town Centre.

Bingley

Bingley is the smallest Town Centre with only 15,940 sq m of retail floorspace. The study found that Bingley has a limited shopping function and performs a role providing for the day to day needs of the local population. The study found that the proportion of both comparison and convenience floorspace is below the national average, whilst the proportion of leisure service, retail service and financial and business service floorspace are all above the national average.

Bingley is dominated by small retail outlets of less than 93 sq m. These represent 62% of all outlets compared to a national average of 39%. The only large-format retail accommodation in Bingley is situated in the Myrtle Walk Shopping Centre. The centre has a high number of vacancies with both the proportion of vacant floorspace and vacant outlets being above the national average. However, the study found that vacancies in the Town Centre had declined since 2001. Many of these vacancies are found in the Myrtle Walk Shopping Centre which itself is poorly lit and of a poor environmental quality. However, this is earmarked for potential redevelopment.

The centre benefits from good accessibility on foot with pedestrian movement around the centre being unproblematic. The Town Centre contains a centrally located train station with services to Skipton, Keighley, Bradford and Leeds. The centre benefits from a large amount of off-street car parking. The Town Centre is currently being redeveloped with a new Town Centre Square which will provide a number of environmental enhancements and improvements to Main Street.

In conclusion, Bingley was found to be a healthy centre performing a role as a service centre. The major issue that the centre faces is the poor quality of the Myrtle Walk Shopping Centre which detracts form the town's environmental quality and does not provide an attractive shopping environment. However, the ongoing redevelopment of Main Street and the Town Square are positive signs for the centre which will be beneficial for the future of Bingley.

Bradford District's Catchment

By analysing the survey results of the market share achieved by all convenience goods facilities in the district, approximately 74.5% of convenience goods expenditure was retained in 2007. Accordingly less than a quarter of convenience goods expenditure generated in the study area were lost to competing centres outside Bradford District.

In terms of comparison goods, existing facilities within the district retain 59.6% of comparison goods expenditure generated by residents within the study area. Whilst the market share achieved for comparison goods shopping is less than that achieved by convenience goods shopping, this lower market share is understandable given the strength of the major centres of Leeds, Huddersfield and other out of centre developments.

Table 1: Market Share of Bradford District (2007)

	Market Share (%)	Expenditure Available to Bradford - £m			
Convenience Goods		**2007**	**2012**	**2017**	**2022**
Main	*73.3*	*473.47*	*523.66*	*584.84*	*653.28*
Top-up	*78.2*	*168.37*	*186.22*	*207.97*	*232.31*
Total Convenience*	***74.5***	***641.84***	***709.88***	***792.81***	***885.58***
Comparison Goods					
Furniture	*63.7*	*114.29*	*154.22*	*210.11*	*286.31*
DIY	*76.3*	*101.17*	*136.48*	*185.92*	*253.31*
Electrical	*62.6*	*120.20*	*162.17*	*220.92*	*301.01*
Total Bulky Goods	***66.6***	***335.65***	***452.86***	***616.95***	***840.63***
Clothing & Footwear	*52.8*	*231.67*	*312.52*	*425.70*	*579.97*
Small H'Hold Goods	*55.8*	*105.38*	*142.18*	*193.70*	*263.94*
Books, CD's, DVD's	*50.3*	*51.02*	*68.83*	*93.77*	*127.77*
Recreation	*55.4*	*169.30*	*228.41*	*311.16*	*423.96*
Chemist	*71.1*	*152.93*	*206.35*	*281.12*	*383.06*
Total Non Bulky Goods	***56.8***	***710.30***	***958.29***	***1,305.46***	***1,778.71***
All Comparison Goods	**59.6**	**1,045.95**	**1,411.15**	**1,922.41**	**2,619.34**
TOTAL	**64.5**	**1,687.8**	**2,121.0**	**2,715.2**	**3,504.9**

With forecast growth in convenience shopping predicted at +1.0% per annum after 2007, it is estimated that Bradford will experience an increase in convenience goods expenditure within the District of some £243.7m between 2007 and 2022 at current market share.

In contrast, the significant increase identified in expenditure on comparison goods would suggest that Bradford's market share would capture a further £1,573.4m between 2007 and 2022.

Bradford District

Based on the current market shares for all existing facilities within the district (which includes town centres, district centres, local centres, freestanding stores etc.), WYG's analysis indicates that existing facilities in the district have a convenience goods turnover of some £641.8m in 2007. In addition, £9.6m (or 1.5%) of convenience goods expenditure is also captured from outside the Study Area (otherwise classed as 'inflow'). WYG has estimated the 'benchmark' turnover of existing facilities in Bradford District based on published trading information. WYG estimate that all facilities have a benchmark convenience goods turnover of £548.9m.

The study indicates that convenience goods facilities in Bradford appear to be overtrading by approximately £102.5m in 2007, primarily due to the overtrading of the WM Morrisons store in

Keighley. This overtrading is set to increase to £157.7m by 2012 and to £307.3m by 2022. The results show that there is an immediate capacity within Bradford District as a whole for additional convenience goods floorspace of between 8,565 sq m (net) and 20,507 sq m (net). However, this is dependent upon the end operator and type of development.

In respect of comparison goods capacity, our analysis identifies that in 2007 existing facilities within the district have a comparison goods turnover of approximately £1,046m. This equates to a market share of 59.6%. The district benefits from some £16.5m (or 2.5%) derived from inflow from outside the study area.

Based on its current market share, Bradford District is identified to have a capacity for almost £288.8m of additional comparison goods expenditure that will be made available for new retail floorspace by 2012. By 2022, this surplus comparison goods expenditure will rise to more than £1.34bn.

Set out below is a summary of the comparison and convenience goods capacity both within the main Town Centres in the district, including:

- Bradford City Centre;
- Ilkley Town Centre;
- Bingley Town Centre;
- Shipley Town Centre; and
- Keighley Town Centre.

Table 2: Summary of the Main Centres (2007)

Centre	Floorspace (sq m)[1*]	Catchment Population[2]			Market Share (%)[2]		Capacity (£m) – 2022[3]	
		Main Food	*Bulky Goods*	*Non Bulky*	*Food*	*Non Food*	*Food*	*Non Food*
Bradford	60,770	22,957	156,004	174,721	3.74	27.22	-1.04	624
Bingley	5,260	3,915	3,856	3,645	0.95	0.60	5.48	13
Ilkley	22,310	23,548	8,632	16,620	3.72	2.30	3.14	51.50
Keighley	51,960	132,465	132,765	95,533	19.30	14.96	150.36	381.72
Shipley	18,660	34,209	14,269	16,709	5.3	2.57	21.98	57.03
District Centres		**-**	**-**	**-**	**25.2**	**3.32**	**47.80**	**106.85**
Five Lane Ends	18,741	41,210	9,138	3,355	4.2	0.81	-1.47	17.74
Girlington	20,316	50,183	8,244	3,680	5.4	0.80	15.26	17.65
Great Horton	2,218	27,252	5,710	5,096	3.8	0.85	0.18	18.65
Greengates	14,932	13,958	3,384	2,730	1.5	0.47	-4.64	11.30
Mayo Avenue	9,644	50,848	70	1,686	4.8	0.20	20.12	4.32
Thornbury	15,848	34,896	20,725	3,718	5.0	1.38	19.60	30.42
Tong Street	5,414	1,662	2,251	828	0.4	0.20	-1.25	6.76
Local Centres	57,131	22,931	22,931	22,931	7.1	1.96	-1.57	43.07
Out-of-Centre	-	47,192	47,192	47,192	9.2	5.30	23.28	116.69

Based on current performance of the main town and district centres, Keighley was identified to be the strongest convenience goods retail destination. Bradford City Centre is identified to provide the most important comparison goods destination, but has a weak convenience goods function. The results also show that some of the defined District Centres (Mayo Avenue, Girlington, Great Horton and Thornbury) perform important roles for convenience shopping compared to some of the Town Centres (Bingley, Bradford, and Ilkley).

The study also illustrates that Bradford City Centre is the strongest bulky and non-bulky comparison goods shopping destination, followed by Keighley Town Centre. The results show that Bingley and Ilkley perform limited bulky goods roles, whilst Ilkley plays a more important non-bulky role to its local catchment. Similar to convenience shopping, the results found that some of the District Centres (Thornbury and Five Lane Ends) play an important bulky and non-bulky comparison role than other competing centres such as Ilkley and Bingley. The results also demonstrate the important role that the network of local centres provide in local main food, bulky and non-bulky shopping in the District. The rise of out-of-centre provision also shows that collectively they have a significant influence on local shopping patterns.

Leisure Provision & Capacity

The study has established patterns within the Bradford area; it is possible to examine the results of the Household Survey in regard to specific leisure activities. These include:

- Cinemas;
- Health and fitness;
- Ten pin bowling;
- Bingo; and
- Pubs/Bars/Nightclubs

In terms of existing provision, the study found that the district has a diverse range of leisure facilities within it. In terms of cinemas, Bradford district contains 15 cinema screens. In terms of bowling lanes, there are 60 lanes in the district as a whole. In addition, the district also contains five bingo halls.

Cinemas

Within the study area, approximately 44% of respondents to the household survey visited the cinema, of which 65% of these visited cinemas within Bradford district. Within the district the most popular cinema was the Cineworld at the Leisure Exchange in Bradford. This was followed by the Odeon Cinema in Thornbury. WYG’s assessment has identified that there is potential support for up to ten cinema screens in Bradford.

Health and Fitness

The study found that a quarter of the respondents within the study area participate in health and fitness activities. Of those people that undertook health and fitness activities, some 66% of respondents stated that they visited facilities in the District. The most popular facility was the Dines First at Horton Park Avenue in Bradford, with a market share of 7%. Other important destinations were Fitness First in Keighley and the Richard Dunn Sports Centre in Bradford, closely followed by Cannons Health Club in Bingley.

Ten Pin Bowling

The study found that 26% of the population participated in ten-pin bowling activity. Of those, 70% indicated that they visited ten-pin bowling facilities no more than once every two months. The study found that there are three ten-pin bowling facilities in Bradford, Keighley and Shipley. The study found that 72% of residents who partake in ten-pin bowling did so in facilities within the district. The most popular destinations were the Hollywood Bowl at Vicar Lane in Bradford, which attracted 47% of those residents, followed by the Hollywood Bowl in Kirstall, and the AMF Bowling in Keighley.

Bingo

The study found that 8% of the population use bingo facilities. Of those that stated that they participate in bingo, 82% stated that they visited facilities within the District. The most popular destinations were large-format clubs including Buckingham Bingo at Bradford Interchange, Mecca Bingo in Bradford, and the Gala Clubs in Tong Street and Keighley.

Pubs/Bars/Nightclubs

The study found that 56% of the resident population indicated that they visited pubs on a regular basis. This increased in age groups between 35 and 54. In terms of restaurants, the study found that 78% of respondents undertook this activity. In contrast, the study found that across the study area only 13% of respondents visited nightclubs.

Potential Development and Emerging Strategy

Given the identified need in the study, WYG recommend that the Council take a pro-active approach to enhance the role of all the key town centres through the plan period. We do not believe that any of the defined Town Centres can afford to stand still. In terms of convenience shopping there is a quantitative need to provide a new foodstore in Bradford City Centre, through enhancing its current poor market share, which will also seek to address the qualitative deficiency in the City Centre. We also believe that there is quantitative and qualitative need to improve the convenience provision in Shipley Town Centre.

In terms of Keighley, the study has found that the proposed new ASDA store will meet the identified quantitative need for the town. The study has also found that up to three new superstores/supermarkets can be implemented in three centres up to 2012. This would satisfy the district's quantitative need in the short term. Subject to the delivery of this we would recommend that the Council review and monitor this over the next five years.

In terms of comparison shopping, the study found that there is capacity to enhance the position of Bradford City Centre through the implementation of major retail development. WYG believe that delivery of the Broadway will be fundamental and will help transform Bradford as a shopping destination and will address the recent decline over the last 10 years. WYG also believe that there is scope to enhance the current positions of Shipley and Keighley as comparison goods shopping destinations through both the redevelopment and the expansion of the existing Town Centres. This expansion will need to be carefully monitored and delivered through appropriately scaled developments.

In terms of Bingley, WYG recommend that the LDF should focus on the redevelopment of the Myrtle Walk Shopping Centre. The objective should be to secure a replacement convenience anchor in the Town Centre which will then help to encourage other comparison retailers to the centre. At the same time, the Council should seek to maintain the centres strong service role.

In terms of leisure development, although the study has found limited capacity for new leisure provision in quantitative terms, there is a qualitative need to improve the leisure provision within Keighley and maybe Shipley. The current leisure provision in Bradford City Centre is good. There is scope to improve the evening economy through the promotion and enhancement of leisure and cultural facilities, which will complement the role and function of the City Centre as a retail destination. This should include improving the quality and range of restaurants, bars, public houses and evening entertainment uses.

The study sets out a clear framework for enhancing and sustaining the role of the defined Town Centres within the district, and that appropriate and sensitive retail and leisure development should be accommodated where possible within the five Town Centres. In terms of the existing network of defined District Centres as set out in the Bradford UPD, WYG has reviewed the role and function of each of these and has concluded that the following centres are performing an adequate role as a District Centre, and require no further action by the Council apart from minor boundary changes where appropriate. These include:

- Five Lane Ends;

- Girlington;
- Great Horton Road;
- Greengates; and
- Thornbury.

The study has recommended that Tong Street becomes a priority for regeneration and investment in order to support and enhance its future role. This is required to help support the regeneration of this deprived area of Bradford and to become a focal point for community life.

Given the lack of diversity of uses, WYG have advised that Mayo Avenue be de-listed as a District Centre and unallocated in future planning documents. As part of the study, WYG also examined 40 local centres throughout the district. The study assessed their current role and function against the definitions in PPS6 to understand whether they were satisfying their required role.

In conclusion, WYG consider that the following local centres are performing their role well and require no Planning Policy intervention from the Council. These include:

- Addingham Local Centre;
- Baildon Local Centre;
- Barkerend Road Local Centre;
- Burnley-in-Wharfedale Local Centre;
- Carlisle Road/Whetley Hill Local Centre;
- Clayton Local Centre;
- Denholme Local Centre;
- Duckworth Lane Local Centre;
- Frizinghall Local Centre;
- Haworth (Main Street) Local Centre;
- Haworth (Mill Hey) Local Centre;
- Horton Grange Local Centre;
- Idle Local Centre;
- Laisterdyke Local Centre;
- Lees Road Local Centre
- Lidget Green Local Centre;
- Marshfields (Manchester Road) Local Centre;
- Oak Lane, Manningham Local Centre;
- Queensbury Local Centre;
- Saltaire Local Centre;
- Silsden Local Centre;
- Thornton Local Centre;

- Undercliffe Local Centre;
- White Abbey Road Local Centre;
- Wibsey Local Centre; and
- Wyke Local Centre.

Based on site visits and analysis of role and function, WYG recommend that the following centres should not be defined as local centres under the guidance of PPS6. These include:

- Bolton Junction Local Centre;
- Buttershaw Local Centre;
- Eldwick Local Centre; and
- Shearbridge/Listerhills (Woodhead Road) Local Centre.

Future Policy Strategy for Local Development Framework

WYG has reviewed the current retail and leisure strategy as set out in Chapter 7 of the Replacement UDP (Adopted 2005). We have examined this against the national Planning Policy set out in PPS6 to ensure that any emerging Local Development Framework will reflect national guidance and will try to emulate the aims and objectives of PPS6. WYG have set out a preferred retail hierarchy which provides a clear network of town, district and local centres. The Council will need to consider other potential strategic locations for local centres to ensure that social inclusion and accessibility considerations are satisfied through the emerging LDF.

The study has reviewed and recommended appropriate changes where possible to many of the adopted retail and leisure policies set out in the UDP. Many of the changes identified by WYG are to ensure that the future policies are compliant with national planning guidance set out in PPS6, and that any future changes required are reflected in the emerging LDF.