

# BRADFORD DISTRICT COUNCIL

## FINAL RETAIL AND LEISURE STUDY

June 2008



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## **Preface**

White Young Green Planning is a leading private planning consultancy who has considerable experience on advising local planning authorities in the UK on retail and leisure matters. Our breadth of advice ranges from assessment of town centre vitality and viability, the production of town centre actions plans, advising on retail hierarchies, estimations of retail or leisure need, assessment of the potential impact of such development on shopping centres and evening economies to the application of the sequential approach to site selection.

White Young Green's continuing involvement in providing retail planning advice to both the public and private sector has enabled us to gain a thorough understanding of the key issues that has helped formulate our methodology. Also our experience in dealing with the development industry on major and smaller town centre and out-of-centre development projects means that we are able to advise on best practice methods linked to securing regeneration and town centre development.

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## GLOSSARY OF TERMS

<b>Capacity -</b>	Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
<b>Study Area -</b>	This represents the household survey area, which is based on postal sectors.
<b>MapInfo (AnySite) -</b>	The database used to identify population, expenditure and socio-economic breakdown of the study area population.
<b>Comparison Goods -</b>	Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6).
<b>Convenience Goods -</b>	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6).
<b>Expenditure per Capita -</b>	This is the average spend of each person within the defined study area on a variety of retail goods.
<b>Expenditure -</b>	Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.
<b>Expenditure Forecasts -</b>	<p>This assessment has been undertaken using the 'goods based' approach as prescribed in PPS6, the information on consumer retail expenditure forecasts have been derived from MapInfo (2007).</p> <p>Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by MapInfo (+1.2% per annum (2005 to 2017) for convenience goods, +5.3% per annum (2006 to 2017) for comparison goods.</p>
<b>Gross Floorspace -</b>	This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
<b>Net Floorspace -</b>	This entails the level of internal area devoted to the sale of goods.

<b>Market Share -</b>	Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.
<b>National Multiple -</b>	This is a retail or service operator which is or part of a network of nine or more outlets.
<b>Price Base -</b>	The price base for the study is 2005; all prices are or have been adjusted to 2005 in order to be consistent.
<b>Rates of Productivity -</b>	This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
<b>Sales Density -</b>	Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
<b>Trade Draw -</b>	This refers to the level of trade attracted to a particular facility/centre.
<b>Turnover -</b>	The turnover figure relates to the annual turnover generated by existing facilities.
<b>Prime A Rents -</b>	Zone A rents (the rental value of the first six metres depth of floorspace in retail outlets from the shop window). It provides a comparable indicator of the strength of individual outlets. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.
<b>Yield -</b>	A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.
<b>GOAD Plans-</b>	Provide accurate retail information on town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Provides information on fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.



<b>GOAD Reports -</b>	Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial /Business Services and Vacancy sectors.
<b>Convenience (GOAD) -</b>	GOAD defines this category as land uses including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences, shoe repairs, supermarkets,
<b>Comparison (GOAD) -</b>	GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, childrens and infants wear, clothing general, crafts, gifts, china and glass, cycles and accessories, department and variety stores, diy and home improvement, electrical and other durable goods, florists, footwear, furniture fitted, furniture general, gardens and equipment, greeting cards, hardware and household goods, jewellery, watches and silver, ladies and mens wear and acc., ladies wear and accessories, leather and travel goods, mens wear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, secondhand goods, books, etc., sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories
<b>Retail Service -</b>	GOAD defines this clothing and fancy dress hire , dry cleaners and launderettes, filling stations, health and beauty, opticians, photo processing, photo studio, post offices, repairs, alterations and restoration, travel agents, TV, cable and vdeo rental, vehicle rental, vehicle Repairs and Services and video tape rental
<b>Leisure Service -</b>	GOAD defines this category as bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, disco, dance and nightclubs, fast food and take away, hotels and guest houses, public houses, restaurants, and sports and leisure facilities

<b>Financial Service -</b>	GOAD defines this category as building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing & copying, property services and retail banks.
<b>FOCUS Report-</b>	Is a database which is used by the commercial development industry. It provides market information on retail availability within specific town centres and retail parks. Up to date retailer requirements and deals is available.
<b>Venuescore -</b>	Venuescore (2006) considers over 2,226 retail venues in the UK, including town centres, stand alone malls, retail warehouse parks and factory outlet centres, based on a scoring system that considers the strength of multiples and anchor stores located within each venue.
<b>City</b>	City centres are the highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions. Planning for the future of such areas can be achieved successfully through the use of area action plans, with masterplans or development briefs for particular sites. (Table 1, Annex A, PPS6).
<b>Town</b>	Town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. (Table 1, Annex A, PPS6).

<b>District</b>	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. (Table 1, Annex A, PPS6).
<b>Local</b>	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. (Table 1, Annex A, PPS6).
<b>Town Centre</b> (ie. types of centre identified in Table 1)	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map. (Table 2, Annex A, PPS6).
<b>Primary Shopping Area</b>	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. (Table 2, Annex A, PPS6).
<b>Primary Frontage</b>	Primary frontages are likely to include a high proportion of retail uses. (Table 2, Annex A, PPS6).
<b>Secondary Frontage</b>	Secondary frontages provide greater opportunities for a diversity of uses. (Table 2, Annex A, PPS6).
<b>Edge-of-Centre</b>	<p>For retail purposes, a location that is well connected to and within easy walking distance (ie. up to 300 metres) of the primary shopping area.</p> <p>For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary<sup>17</sup>.</p> <p>In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For</p>

example, local topography will affect pedestrians' perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre. (Table 2, Annex A, PPS6).

**Out-of-Centre**

A location which is not in or on the edge of a centre but not necessarily outside the urban area. (Table 2, Annex A, PPS6).

**Out-of-Town**

An out-of-centre development outside the existing urban area. (Table 2, Annex A, PPS6).

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# 1 INTRODUCTION

## Objectives of the Study

1.01 White Young Green (WYG) was commissioned by Bradford District Council in September 2007, to undertake a comprehensive assessment of current and future capacity for retailing and leisure in Bradford District. This study is to inform the preparation of the Council's Local Development Framework (LDF). In response to the Tender Brief, the report addresses the following objectives:-

- Undertake a health check on the vitality and viability of the City and Town Centres and District and Local Centres in accordance with the advice set out in Planning Policy Statement 6 – Planning for Town Centres;
- Confirm the appropriateness of or suggested amendments to the Bradford Replacement Unitary Development Plan (adopted October 2005) defined City, Town, District and Local Centre boundaries;
- 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 on the need to plan for expansion or contraction of the Centres with the Bradford District;
- An assessment of the 'net' leakage of retail expenditure from the Bradford catchment area to:
  - a. Competing retail centres;
  - b. Catalogue shopping; and
  - c. Internet shopping.
- Advise on the relevant retail hierarchy of Bradford Metropolitan District's Centres with the Leeds City Region context; and
- Advise on a strategy for retail and leisure development through recommendations , so as to inform the emerging Local Development Framework;

1.02 This 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.

1.03 In undertaking the study, consideration has been made with regard to the relevant advice contained in Planning Policy Statement 6 (PPS6) 'Planning for Town Centres'. The study also took into account a number of further documents including:

- A Strategy for Airedale – Retail Analysis (2003) by Colliers CRE;
- Retail Capacity Study by Colliers Erdman Lewis (1999);
- Airedale Corridors Masterplan (2006);
- Bradford City Centre Masterplan (2003); and
- Neighbourhood Development Frameworks (2005 & 2006)

## **2 CURRENT AND EMERGING RETAIL AND LEISURE TRENDS**

### **Introduction**

- 2.01 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse park and out-of-town regional shopping malls.
- 2.02 During this time, the retail and leisure sectors have experienced considerable growth. Spending on retail goods has significantly increased over the past decade, particularly spending on comparison (or non-food) goods. This growth in spending is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes are having an impact on the format of retail and leisure floorspace. Research undertaken by British Council of Shopping Centres ('Future of Retail Property, 2006/7') identified that for the period 1999 to 2005 the proportion of new retail space that was developed in UK town centres rose to 35%. This reflects the Government's 'town centres first' approach.

### **Current Retail Picture**

- 2.04 Research undertaken by Colliers CRE (Midsummer Retail Report, June 2007) provides information on recent trends together with forecasts for the future of retailing in the UK.
- 2.05 The research identifies that although the UK has seen impressive economic growth over the 2006 to mid-2007 period, particularly in the financial and business services sector, economic growth over the latter part of 2007 and during 2008 is expected to decline. Inflation in the price of retail goods is rising, and although retail sales grew in the first quarter of 2007, the rate of growth is lower than previously recorded which may indicate that retail growth has peaked.
- 2.06 Indeed, high street retailers reported poor trading figures over the 2007 Christmas period, with the worst retail sales growth for three years. Indeed, Debenhams, Next, Marks and Spencer, Currys and J Sainsburys reporting lower than expected sales figures. This is despite heavy discounting on products over the festive period.
- 2.07 The slowdown in spending recorded over 2007 comes after five interest rate rises since August 2006, modest income growth and tighter lending conditions, which have impacted on

spending. Clothing and footwear sales, particularly Women's clothing, was felt most acutely by mid-range retailers within designer ranges and value retailers performing well (according to the British Retail Consortium). The homeware and furniture market has also reported poor sales growth in response to the slowdown in the housing market, whilst health and beauty sales slowed dramatically.

2.08 Notwithstanding this, the market for recreational goods including DVDs, CDs, toys, computers and books performed well, with healthy growth aided by supermarket sales over the latter part of 2007.

2.09 Overall, indications from the 2007 Christmas sales period point to a challenging 2008 for retailers, especially in light of falling income growth and a decline in savings. Colliers CRE predict that retailer confidence will erode over 2008 as a result of slowing house prices, which will reduce retail sales growth, and due to increased competition for custom.

### **Trends in Comparison Goods Shopping**

2.10 Whilst it is anticipated that over the next ten years the growth in retail spending will slow down, there will continue to be significant growth in retail expenditure, particularly on comparison goods. Research undertaken by BCSC identifies that there will be a need for more than six million square metres (gross) of additional comparison goods floorspace in England and Wales between 2006 and 2015, although this does not take into account developments in the pipeline. This represents an increase of approximately 10% on the 2005 stock.

2.11 There is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples; many of which have been affected by the significant increase in e-tailing. As a consequence of the recent performance retailers are more reluctant to commit to many schemes in contrast with previous decades. Instead, retailers are being more selective in choosing schemes that are appropriate in terms of location and the types of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods.

2.12 International market conditions and price deflation in some key sectors means that many high street names are becoming increasingly vulnerable to takeovers. Similarly, due to increased competition there have been a number of high profile losses from the high street, including Littlewoods and Music Zone.



2.13 There will continue to be demand for larger, more modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will be increasingly rejected. However, many national retailers are now looking at smaller/lower order centres in order to increase their market share. Many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

### **Trends in Food Retailing**

2.14 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the adoption of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.15 Nevertheless, Verdict (2007) notes that supermarkets increased their combined floorspace by some 294,400 sq m in 2006, which is more than double the amount added in 2005. Tesco has been particularly prolific by aggressively targeting space as a means to boost sales. The closure in 2006 of a planning loophole regarding mezzanine floors led to a rush of floorspace expansions in supermarkets prior to this time. However, Tesco is still expected to increase its UK floorspace by around 6% in 2007/08, with ASDA, Sainsburys, Morrisons, Waitrose, Marks and Spencer and Iceland all set to open new stores. Growth at the discounter end of the market is more limited however, and notably in 2007 Kwik Save ceased operating.

2.16 Tesco has traditionally dominated the grocery sector in the UK, and has by far the largest market share. However, given renewed expansion from Sainsburys, Morrisons and Waitrose stores, Tesco have been made less competitive in bidding for new sites, particularly given that cannibalisation of trade is occurring in many locations due to a proliferation of existing

Tesco stores. In light of the changing market conditions, Tesco are looking overseas for ensuring continued growth.

- 2.17 As a result, whilst supermarkets are still seeking to take more new retail floorspace, in light of national planning policy and the 'town centre first' approach, there is seen to be a general lack of supply of new supermarket sites.
- 2.18 In terms of products, major areas of growth in the convenience market have been fair trade and organic produce, with customers willing to pay higher prices for food with the expectation of better quality produce and more ethical practices in production and supply.
- 2.19 The number of forecourt convenience stores, once popular with consumers, is now declining due to static fuel sales and high operating costs. Although there are currently around 10,400 forecourt convenience stores in the UK this forecast to fall to around 8,500 by 2010 (UK Forecourt Retailing, IGD, 2005). Notwithstanding this the average floorspace of forecourt stores is increasing as all the major retailers continue to open and expand such operations to supplement their existing store networks.
- 2.20 Farmers markets and specialist firms offering a home delivery service, for example organic food, are small-scale operations that are growing in popularity.

### **In Town Investment and Prime Rents**

- 2.21 Colliers CRE highlight that August 2006 saw a cooling of demand for town centre representation in the retail market. Over the 2006-2007 period a lack of meaningful activity was recorded, with investors deterred by interest rate rise, retail failures and poor high street rental growth, despite retail yields over this period declining, suggesting improved investor confidence. Indeed, Property Data show that the volume of deals was down by 60% in 2006 compared to 2005.
- 2.22 Spring 2007 has seen renewed interest in retail propriety investment however, although this is still lower than in previous years. Although investors are still active in acquiring property, this has been on a more selective basis with the variety of bidders being reduced. Investors are concentrating on predominantly substantial, prime, well located assets in major city/town centres and in Central London. This may indicate a willingness to take a longer term view on the high street, rather than a demonstration of confidence in the current market.
- 2.23 Over the 12 months to May 2007, the prime Zone A rental level increased recorded in the UK was the smallest since the 2000/2001 period. Once inflation is striped out of this change, prime Zone A rents in real terms are seen to have actually fallen over the twelve months to

May 2007. Nationally, there is differentiation in the performance of Regions, with five Regions (including London and the South West) recording static or increased prime rents, and seven regions recording a fall in their rental growth rate (including Yorkshire and the Humber, the West Midlands and the North West and Merseyside). Notably, both the North West and Merseyside and Yorkshire and The Humber both underperformed against the UK national average in terms of rental level gains.

### **Out of Centre**

- 2.24 Colliers CRE note that demand for out-of-centre representation is relatively static, with some retailers including TK Maxx, Asda Living and Tesco Home Plus actively seeking to expand their out-of-centre floorspace and others, including Focus, MFI and Currys either disposing of stores or downsizing their operations.
- 2.25 In terms of proposals in the development pipeline, the majority of consents for out-of-centre retail floorspace are for bulky goods stores. However, there has been a decline in out-of-centre proposals in the development pipeline during 2007. Despite this, Colliers CRE predict that the development of out-of-centre floorspace development will increase compared to 2007, albeit by a modest amount.

### **Shopping Centre Development**

- 2.26 Research undertaken by Colliers CRE recognises that within town centres, supply outstrips demand. This is particularly prevalent in terms of lettings within shopping centres. As a result, Colliers CRE expect future shopping centre schemes to be pre-let by only 70% to 80%. This compares to a number of similar schemes being 100% pre-let in previous years. This is symptomatic of a reluctance of retailers to commit to schemes. This presents challenges for schemes due to open in the next few years, and it is anticipated that the timeframe for developing many shopping centre schemes will be pushed back.
- 2.27 The research also identifies that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Fraser and Marks and Spencer, are able to negotiate very favourable letting terms.
- 2.28 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-

centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.

### **Growth in E-tailing ('E-commerce')**

- 2.29 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.
- 2.30 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online.
- 2.31 In 2006, online sales of £10.9 billion were recorded in the UK which represents a per annum growth of 33.4% (Colliers CRE). More than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.
- 2.32 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007. This equates to some £46.6 billion of expenditure. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, internet spend during 2007 is significantly higher than that recorded for 2006.
- 2.33 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted of a little under 10% in 2011. Against this, forecasts by Experian indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 10%.
- 2.34 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online

retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m) it is likely that the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.

2.35 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).

2.36 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.

2.37 Despite all these different assumptions with regard to the future affect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity. Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet

2.38 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.

### **Trends in Leisure**

2.39 Leisure is the most rapidly expanding sector of the UK economy and has experienced dramatic changes and growth during the last decade. The main sectors in the leisure industry are explored below in more detail.

### Cinemas

- 2.40 During the mid-1990s the established multiplex cinema operators undertook a rapid expansion throughout the United Kingdom. The operators moved away from their traditional City Centre locations and opened large 'category killer' cinemas (usually between 12-16 screens). This expansion marked the advent of the out of town leisure park as other leisure operators sought to locate adjacent to the cinemas, believing there was a natural synergy between the uses. This in turn fuelled the expansion in health & fitness and revived the interest in bowling centres.
- 2.41 The cinema operators had traditionally expanded on a piecemeal basis, usually by acquiring their own freehold site but in order to realise the proposed rapid expansion, the operators had to sign up to institutional leases with high rents. Operators quickly realised that these rental levels were unsustainable. At the same time, the operators realised that they were reaching saturation level and could not sustain any further large developments. This was coupled with the downturn in cinema attendances, primarily as a result of limited 'blockbuster' movies.
- 2.42 As a consequence, operators slowed down their acquisition programmes, although two companies were borne out of this, namely Cine UK and Spean Bridge, who identified that there was a need for a multiplex in smaller towns but of a smaller scale. Many developers were left with sites with leisure consent and no operator of any strength and in reality they needed a cinema to anchor the scheme and attract the associated uses. Therefore, the likes of Cine UK undertook a relatively unchallenged expansion throughout the United Kingdom, cherry picking the opportunities that were available and driving extremely hard financial transactions. This had a substantial impact on the developer's residual valuation and in many cases prevented sites earmarked for leisure development progressing.
- 2.43 More latterly, acquisition of cinemas has been at a corporate level with the main operators pursuing company acquisitions. As a consequence, the two most active operators in the United Kingdom are currently Vue and Cineworld.

### Health and Fitness

- 2.44 At the same time as cinema expansion, the concept of the modern large private members health and fitness club was realised and there then followed expansion throughout the country, and examples include Esporta and Greens. This particular market has reached saturation point with operators now opening very few new health clubs and expansion tending to occur through a company acquisition. As the concept evolved, certain operators recognised the need for representation in smaller towns and therefore, the likes of Fitness First and LA Fitness progressed an acquisition programme based on smaller units.

2.45 More recently, two operators entered the market to aggressively compete, namely Total Fitness, whose philosophy is to construct large health clubs with lower membership fees and JJB Sports, who have pioneered their concept of a ground floor health & fitness club with mezzanine level retail, primarily situated on retail parks.

#### Bowling

2.46 Bowling centres have long been a traditional place of family entertainment. However the concept had never been updated. Various operators tried to expand the concept to a family entertainment centre, which was effectively meant to be a combination of several complementary uses under one roof. This concept failed but did revive interest in upgrading the bowling centre offer.

2.47 There is still only a handful of bowling centre operators seeking to expand, the best known of which is Hollywood Bowl, although there is a number of strong original operators now undertaking expansions throughout the United Kingdom.

2.48 As with the cinema operators however, the fit out costs of bowling centres are extremely high and therefore they do tend to negotiate transactions whereby they receive substantial amounts of up front cash from the developer. The other criterion for bowling centre operators is synergy with adjacent users, in particular cinemas, and the operators prefer sites with large amounts of free car parking.

2.49 Mintel note that the popularity of tenpin bowling has declined in recent years, and it is anticipated that this trend will continue. Tenpin bowling has undergone a shift in patronage in recent years, with attendees now more likely to be part of group visiting the location for mixed leisure activities rather than solely for ten-pin bowling. However, although demand for ten pin bowling alleys is likely to be restricted, demand for the expansion and refurbishment of existing venues may increase.

#### Restaurants

2.50 This sector also expanded to mirror the cinema expansion and was effectively split into two offers, namely out-of-town situated on leisure parks and the more traditional town centre offer.

2.51 The leisure park offer ultimately either performed poorly or reached a saturation level and now there are only two or three restaurant operators, such as Pizza Hut, Frankie & Bennys and Nandos who are actively acquiring units in these locations.

2.52 Within the town centre restaurant offer, this in many ways has mirrored the trend of the edge-of-town/out-of-town operators with many having reached saturation level in town and city

centres. There has also been a noticeable lack of 'new entrants' into the sector and therefore over and above the established national names such as Pizza Hut, McDonald's, and Chiquito one is looking towards the strong independents such as The Living Room, Croma and Piccolinos to take vacant space in city centres.

#### Public Houses

- 2.53 The public house operators can effectively be split into three sectors; edge-of-town on leisure parks; edge-of-town standalone on busy arterial roads; and town centre.
- 2.54 Many operators jumped onto the success of the edge-of-town leisure development. However, it became apparent that this concept would not work for the public house operators. As a consequence the expansion on such schemes is extremely limited.
- 2.55 The operators remain extremely keen on the potential to acquire sites on a freehold basis in good suburban areas and on prominent main roads and often will combine their requirement with a budget hotel operator if possible.
- 2.56 In the town centre market, again due to corporate acquisition of companies, there is a very limited amount of new entrants.

#### Bingo

- 2.57 Bingo has been well represented over many years. Initially operators located themselves in town centre sites, either at ground floor or at first floor. However, operators now have a preference to locate on freestanding edge-of-town locations with free customer car parking. Of all the leisure operators, bingo is seen to be the less concerned about adjacencies, i.e. adjacent leisure operators as the concept seems to be able to trade very successfully on its own. However, although bingo participation with the younger population has increased in recent years the forthcoming smoking ban is likely to affect future expansion in this sector, at least in the short term. Indeed, the smoking ban currently in place in Scotland has affected trading performance of a number of bingo clubs.



### 3 PLANNING POLICY FRAMEWORK

#### Introduction

3.01 Given that this study seeks to provide important evidence that will assist in the future development of the LDF process, it is important identify key policy advice and how the national and regional guidance may impact upon the development of policies locally. The key texts that have been considered as part of our study include:

- Planning Policy Statement 6 ‘Planning for Town Centres – PPS6’ (March 2005);
- Planning Policy Statement 4 ‘Sustainable Economic Development – PPS4’ (Consultation Draft) (December 2007);
- The Yorkshire and Humber Plan –Regional Spatial Strategy (RSS) to 2026 (May 2008)

#### **Planning Policy Statement 6 – Planning for Town Centres (March 2005)**

3.02 Planning Policy Statement 6: ‘Planning for Town Centres’ (PPS6) was published in March 2005 and sets out the Government’s national policies and principles with regard to retailing and town centres.

3.03 Paragraph 1.3 of PPS6 notes that: **‘The Government’s key objective for town centres is to promote their vitality and viability by:**

- **Planning for the growth and development of existing centres; and**
- **Promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment accessible to all.’**

3.04 There are other Government objectives which should be considered in the context of paragraph 1.3. These include:

- **‘enhancing customer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, particularly socially-excluded groups;**
- **supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and**
- **improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.’**

3.05 In order to deliver the Government’s objectives, paragraph 2.1 notes that development should be focused in existing centres in order to strengthen and, where appropriate, regenerate them.

3.06 A positive and proactive approach to planning is encouraged by the guidance, noting that local planning authorities should work in conjunction with stakeholders and the community to, *inter alia*, assess the need for new floorspace for retail, leisure and other main town centre uses, taking into account both quantitative and qualitative considerations.

3.07 In assessing the need and capacity for additional retail and leisure development, paragraph 2.33 of PPS6 notes that:

**'...local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However, local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve communities in these areas, additional weight should be given to meeting these qualitative considerations.'**

3.08 In terms of quantitative need for additional retail development when preparing its development plan documents, paragraph 2.34 notes that a local planning authority should assess the likely future demand having a realistic assessment of:

- **'Existing and forecast population levels;**
- **Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors; and**
- **Forecast improvements in productivity in the use of floorspace.'**

3.09 In terms of qualitative need, the guidance states at paragraph 2.35 that:

**'...a key consideration for a local planning department will be to provide for consumer choice by ensuring that:**

- **An appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and**
- **Provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.'**

3.10 The guidance further states at paragraph 2.36 that in addition to the above, other considerations that may be taken into account include the degree to which shops may be overtrading.

- 3.11 The guidance in paragraph 2.41 of PPS6 states that Local Planning Authorities should ensure when selecting sites for development that the scale of opportunities identified are related to the role and function of the centre and its catchment. Appropriate development should be located in the right type of centre to ensure that it fits and complements its role and function.
- 3.12 In terms of local centres, given their characteristics the guidance considers that it would be inappropriate as a location for large scale new development. Therefore, Local Planning Authorities are to consider an indicative upper limit for the scale of development likely to be permissible in different types of centres.
- 3.13 PPS6 adopts the sequential approach to site selection whereby Local Planning Authorities should select appropriate sites for allocation within identified centres where an identified need is to be met. All options in town centres should be thoroughly assessed before less central sites are considered for development of town centre uses. Paragraph 2.44 sets out the sequential approach that is required. A development should be considered in the following order:
- First locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become available within the development plan document period, taking account of an appropriate scale of the development in relation to the role and function of the centre; and then
  - Edge-of-centre locations with preference given to sites that are or will be well connected to the centre; and then
  - Out-of-centre sites with preference given to sites that are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of performing links with the centre.
- 3.14 When considering sites Local Planning Authorities should, in consultation with stakeholders identify an appropriate range of sites to allow the accommodation of the identified need. It also recognises that Local Planning Authorities should be flexible and realistic when drawing up such sites and should discuss this with developers and operators. It is also recognised that Local Planning Authorities should have appreciation for business models and should take into account business models in terms of scale, format, car parking provision and the scope for disaggregation.
- 3.15 When considering potential sites for allocation either in edge-of-centre or out-of-centre locations, the statement also suggests that Local Planning Authorities should assess the impact that potential development could have on identified centres within the catchment. In

addition, Local Planning Authorities should ensure that locations are accessible when selecting appropriate sites for allocation. These should be:

- Whether the site is or will be accessible or well served by a choice of means of transport, especially public transport, walking and cycling, as well as by car; and
- The impact on car use, traffic and congestion.

3.16 PPS6 identifies that other matters which may be relevant when considering sites for allocation in future development plan documents include: the physical regeneration benefits of developing a site; additional employment opportunities; economic growth; and social inclusion.

3.17 Local planning authorities are also required to allocate sufficient sites for the future which can accommodate the identified need for at least the first five years from the adoption of their development plan documents. Notwithstanding this, for large town centres a site will be needed to be identified for a longer term period.

#### **Planning Policy Statement 4 - Sustainable Economic Development (Consultation Draft) (December 2007)**

3.18 The consultation draft to PPS4 seeks local planning authorities to proactively encourage economic growth in line with the principles of sustainable development. The guidance seeks that flexible policies are developed which are able to respond to economic change and the need to for the co-ordination with infrastructure and housing provision.

3.19 The guidance seeks to ensure that the planning system provides key economic development outputs proposed by the Government including raise the productivity of the UK economy, maximise job opportunities, reduce the gap in economic development rates between the regions, deliver sustainable development and build prosperous communities.

3.20 The guidance recognises the role that retail, leisure and office uses have on economic development and that town centres are major employment generators. The guidance seeks that local planning authorities assess the existing supply of available land for economic development which supports specific sectors. The guidance seeks to focus office development to be located at first preference to sites in or on the edge of town centres consistent with the sequential approach. The guidance seeks to make efficient and effective use of land including vacant and derelict buildings to contribute positively towards an area's regeneration to provide wider economic benefits.

## **Regional Spatial Strategy for the Yorkshire and Humber- (May 2008)**

- 3.21 The Regional Spatial Strategy for Yorkshire and the Humber (RSS) has been finalised and sets out the spatial planning for the region. The RSS aims to guide development over the next 15 to 20 years. It influences the future direction of the economy, housing, transport, the built and natural environment. It provides a long term strategy for the region to help it become more competitive and sustainable patterns and forms of development, investment, and activity.
- 3.22 The RSS recognises that main city, town and village centres throughout the region are critical in providing business services and performing a role as centres for social, cultural and political life. Bradford sits within the Leeds City Region sub area. The RSS identifies Bradford as a Regional City within the regional settlement network with Keighley and Ilkley as principal towns.
- 3.23 Regional cities are to be the prime focus for housing, employment, shopping, leisure, education, health and cultural activities in the region. These regional cities will be transformed into attractive places where people want to live, work, invest and spend time in. Whereas Principal Towns should be the focus of housing, employment, shopping, leisure, education and health and cultural activities.
- 3.24 **Policy YH7** deals with the location of new development, the policy seeks that first priority should be for the re-uses of previously developed land and buildings within developed areas within city and towns. The second priority is towards other suitable infill opportunities within city and towns. The third priority relates to extensions to city and towns.
- 3.25 **Policy LCR1** deals the Leeds City Region. It aims to transform Bradford as a regional city through significant growth in economic development, jobs and homes through the renaissance of the city and the development and regeneration elsewhere. Bradford is identified by the RSS as a major engine to the economic development of the regional economy. The policy also seeks to promote strategic development in the Airedale areas increasing development in Keighley (and Skipton).
- 3.26 **Policy LCR2** deals with significant investment in the Leeds City Region and seeks to support the renaissance of Bradford City Centre.
- 3.27 Chapter 11 of the RSS deals with creating a success and competitive regional economy. The RSS recognises the regional cities as a key driver of productivity to securing competitive advantage. **Policy E1** (i) recognises retail and leisure development as key economic and employment generators. Policy E2 deals with town centres. The policy seeks to strengthen

the role and performance of existing city and town centre through strategies and investment decisions. Bradford as a regional city should be the focus for office, retail, leisure, entertainment, arts, culture, and tourism. **Policy E2B** seeks that other measures including environmental enhancement, accessibility improvement and town centre management and promotion can also improve the vibrance of existing centres. **Policy E2C** restricts new, or large scale expansion of existing, out-of-centre regional or sub-regional shopping centres.

3.28 **Policy E3** of the RSS deals with land and premises for economic development. The RSS seeks to ensure that previously development land should be available to provide sufficient land and premises in sustainable location to meet the modern economies requirements. The need for additional office, retail and leisure floorspace is to be focused in existing city and town centres.

3.29 **Policy E5B** deals with promoting tourism in City Centres such as Bradford, the RSS seeks to realise the potential of heritage, leisure and cultural assets by promoting their roles as modern, varied and destinations.

## 4 ORIGINAL MARKET RESEARCH

### Introduction

4.01 Although WYG acknowledges that there are limitations to survey research, particularly in relation to the samples that can be achieved, the results provide important broad indicators as to consumer preferences in relation to where people live and shop. Indeed, original market research enables analysis of a particular area, which helps to evaluate the actual draw of major centres and how they impact upon the market share of smaller centres. This is particularly pertinent to existing centres within Bradford given the proximity and strength of the competing centres such as Leeds, Halifax, Huddersfield and major (regional) out of centre retail destinations such as White Rose Shopping Centre and Birstall Retail Park. The use of specifically commissioned survey research is fundamental in informing a study that will effectively identify the likely capacity for future floorspace within the District.

4.02 A key element of this Study was to obtain a detailed understanding of shopping patterns within the District and the potential catchment of existing centres within it. WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised the following:

- Household Telephone Survey;
- On-street survey; and
- Business Survey<sup>1</sup>.

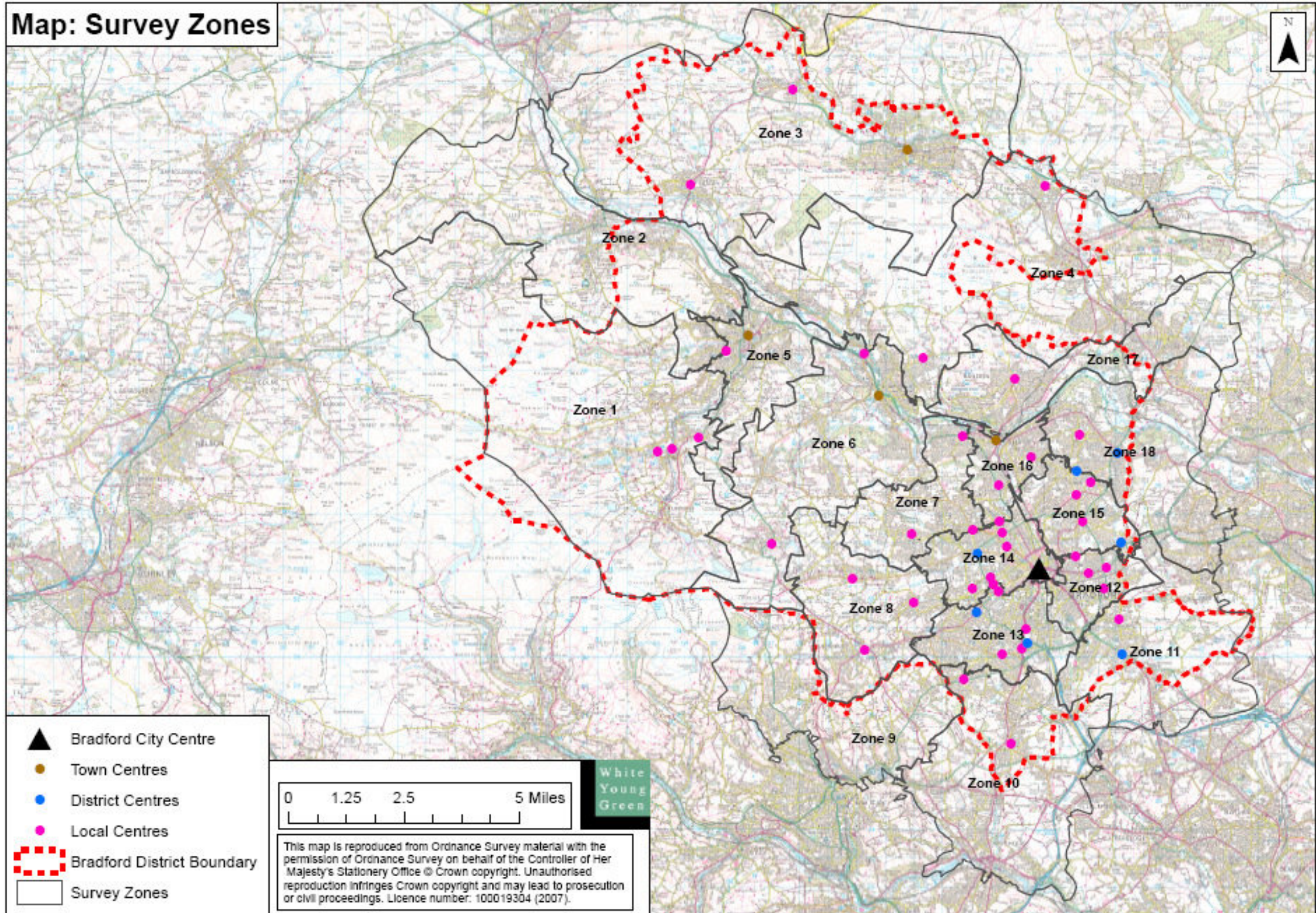
### Household Telephone Survey

4.03 In October 2007 a survey of 1,996 households was undertaken within a defined Study Area, which comprised the District of Bradford, extending into the neighbouring authorities of Leeds, Calderdale, Kirklees, Craven and Harrogate and including the centres of Bradford, Bingley, Ilkley, Keighley and Shipley. The plan overleaf (Figure 4.1) indicates the extent of the defined Study Area.

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<sup>1</sup> Business survey undertaken by WYG

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





4.04 The survey area was broken down into 18 zones and was based on postcode sectors at a five digit level (e.g. BD22 0):

Zone 1	(BD22 0, BD22 7, BD22 8 and BD22 9)
Zone 2	(BD20 6, BD20 7, BD20 8 and BD22 6)
Zone 3	(BD20 0, BD20 9, LS29 0, LS29 8 and LS29 9)
Zone 4	(BD16 3, BD20 5, LS20 8, LS20 9, LS21 3, LS29 6 and LS29 7)
Zone 5	(BD21 1, BD21 2, BD21 3, BD21 4 and BD21 5)
Zone 6	(BD13 4, BD13 5, BD15 0, BD16 1, BD16 2 and BD15 4)
Zone 7	(BD9 5, BD9 6, BD15 7, BD15 8, BD15 9 and BD18 4)
Zone 8	(BD13 1, BD13 2, BD13 3 and BD14 6)
Zone 9	(HX2 8, HX2 9, HX3 6 and HX3 7)
Zone 10	(BD6 2, BD12 0, BD12 7, BD12 8, BD12 9, BD19 6, HD6 1, HD6 2, HD6 4 and HX3 8)
Zone 11	(BD4 0, BD4 6, BD4 9, BD11 1, BD11 2 and LS28 8)
Zone 12	(BD3 8, BD3 9, BD4 7 and BD4 8)
Zone 13	(BD5 0, BD5 7, BD5 8, BD5 9, BD6 1, BD6 3, BD7 3 and BD7 4)
Zone 14	(BD7 1, BD7 2, BD8 0, BD8 8, BD8 9, BD1 1, BD1 2, BD1 3, BD1 4, BD1 5 and BD8 7)
Zone 15	(BD2 1, BD2 2, BD2 3, BD2 4, BD3 0 and BD3 7)
Zone 16	(BD9 4, BD18 1, BD18 2 and BD18 3)
Zone 17	(BD17 5, BD17 6, BD17 7 and LS19 7)
Zone 18	(BD10 0, BD10 8, BD10 9, LS19 6, LS28 5, LS28 6 and LS28 7)

4.05 In **Appendix 1**, we have provided maps of each of the survey zones to show their extent and how they relate to each town, district and local centre. A copy of the questionnaire and full tabulations of the Bradford Household Survey is contained at **Appendix 2**.

### **On-Street Survey**

4.06 In addition, an on-street survey was undertaken within the five town centres and seven district centres within the District in order to identify customer views of current shoppers to these centres, including their perception of each town centre and how they could be improved. In this respect, a total of 1,065 surveys were undertaken within the town centres of Bradford (259 surveys), Bingley (100 surveys), Ilkley (100 surveys), Keighley (115 surveys) and Shipley (100 surveys) and within the district centres of Girdlington (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). The on-street surveys were conducted between Friday 5 and Wednesday 17 October 2007. The tabulated results of the on-street survey are contained at **Appendix 3**.

### **Business Survey**

4.07 To complement the survey work commissioned for NEMS Market Research, WYG also undertook a Business Survey in October/November 2007 of all businesses within the five town and seven district centres. This survey explored the current strengths and weaknesses from a business operator's perspective as recommended by PPS6.

4.08 Business Surveys were distributed to all of the commercial businesses within the five town centres and seven district centres within the District. A copy of the questionnaire and summary of results are contained at **Appendix 4**. A total of 1,748 surveys were distributed as follows:

#### *Town Centres*

Bradford	515 distributed, 100 returned, 19% response rate
Bingley	146 distributed, 45 returned, 31% response rate
Ilkley	244 distributed, 80 returned, 33% response rate
Keighley	402 distributed, 58 returned, 14% response rate
Shipley	198 distributed, 48 returned, 24% response rate

#### *District Centres*

Five Lane Ends	35 distributed, 4 returned, 11% response rate
Girlington	70 distributed, 11 returned, 16% response rate
Greengates	35 distributed, 4 returned, 11% response rate
Great Horton	52 distributed, 4 returned, 8% response rate
Mayo Avenue	2 distributed, none returned
Thornbury	17 distributed, 1 returned, 6% response rate
Tong Street	32 distributed, 4 returned, 13% response rate

## 5 ASSESSMENT OF VITALITY AND VIABILITY OF EXISTING CENTRES

### Assessing the 'Vitality and Viability' of Existing Centres

- 5.01 Planning Policy Statement 6 'Planning for Town Centres' (2005) emphasises the importance of maintaining a 'healthy' town centre as it helps foster civic pride and local identity and can contribute towards the aim of sustainable development. It also states that by monitoring town centres on a regular basis, signs of decline can be identified early. **Appendix 5 and 6** provides detailed analysis of the vitality and viability of the following centres in accordance with guidance contained in PPS6:
- Bradford City Centre;
  - Bingley Town Centre;
  - Keighley Town Centre;
  - Ilkley Town Centre; and
  - Shipley Town Centre.
- 5.02 We have also examined (but in less detail) (**Appendix 7**) the following seven district centre, which also form an important retail and service role to the local community:
- Five Lane Ends;
  - Greengates;
  - Girdlington;
  - Great Horton;
  - Mayo Avenue;
  - Thornbury; and
  - Tong Street.
- 5.03 WYG has also visited and examined the network of 40 local centres within the district to appreciate their distribution, role and function. These are set out in **Appendix 8**. The following local centres were examined:

- Addingham;
- Allerton;
- Baildon;
- Bankfoot;
- Barkered Road;
- Bolton Junction;
- Burley in Wharfedale;
- Buttershaw;
- Carlisle Road;
- Clayton;
- Cross Roads;
- Crossflats;
- Denholme;
- Duckworth Lane;
- Eccleshill;
- Eldwick;
- Fell Lane;
- Frizinghall;
- Howarth (Main Street);
- Howarth (Mill Hey);
- Holmewood;
- Horton Grange;
- Idle;
- Laisterdyke;
- Leeds Road;
- Lidget Green;
- Marshfield;
- Oak Lane;
- Princeville;
- Queensbury;
- Saltaire;
- Shearbridge Listerhills;
- Silsden;
- Sticker Lane;
- Thornton;
- Undercliffe;
- White Abbey Road;
- Wibsey;
- Wrose;
- Wyke.

5.04 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the 'health' of existing centres. These indicators are as follows:

- **Diversity of main town centre uses (by number, type and amount of floorspace):** An Experian land use plan<sup>2</sup> (Goad plan – 2000, 2001, 2006 and 2007) is used to assess the diversity of uses in the town centres;
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** WYG includes all retail floorspace in the Bradford administrative area (where available) in the assessment;
- **The potential capacity for growth or change of centres in the network:** WYG has considered the opportunity for the main centres within the District to expand, including considering the scope for more intensive development on previously developed land;
- **Commercial Operator representation and intentions to change representation:** Derived from the land-use surveys, town centre business surveys (**Appendix 4**) and FOCUS reports (2007) from outstanding retailer demand;
- **Shopping rents:** the average Zone A rents paid in centres, derived from published data (where available) or discussions with local agents;
- **Proportion of vacant street level property:** derived from the land-use surveys;

<sup>2</sup> Experian Goad information is only available for Bradford, Bingley, Ilkley, Keighley and Shipley. OS based land use plans (derived from ProMap) are used for the other centres

- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from published data, where available;
- **Pedestrian flows:** from on-site observations;
- **Accessibility:** from WYG's assessment and shopper and business surveys;
- **Customers' and residents' views and behaviour:** derived from the various surveys;
- **Perception of safety and occurrence of crime:** from various surveys and 'on-the-ground' observations; and
- **State of the city/town centre environmental quality:** from 'on-the-ground' observations and survey results.

### **Town Centres**

5.05 Based on our analysis, set out below is a SWOT analysis and summary of the five town centres within the District.

#### **Bradford**

5.06 Bradford shopping centre of regional significance. It is ranked 101<sup>st</sup> nationally by Venuescore (2006), although it has experienced a decline of 12 in the national rankings since 2005. The defined Central Shopping Area contains 473 retail outlets occupying 98,730 sq m of retail floorspace. The comparison goods sector is the most prolific in terms of floorspace, accounting for 53% of the total retail floorspace in the centre, although it contains a wide variety of other commercial retail and leisure uses. It also performs a range of civic and cultural services, containing Council Offices, Law Courts, an public library, the Alhambra Theatre, the National Media Museum, St. George's Concert Hall and a Tourist Information Centre. It is significant to note that the total amount of retail floorspace in the centre has dropped by approximately 10,000 sq m over the 2001 to 2007 period. This can be attributed to the demolition of a number of retail outlets in the Broadway and Petergate area to make way for the Broadway Shopping Centre redevelopment. Consequently, it is not indicative of a weakening in Bradford's retail sector.

5.07 Due to the historic nature of the city centre, it is dominated by small retail outlets. The Goad Town Centre survey (2007) also indicates that Bradford contains an above average representation of vacant outlets, many of which are of poor quality. The high proportion of small vacant outlets indicates that these may be unsuitable to the demands of modern

retailing. However, vacancies in the city centre have declined since 2001, which is a positive sign for the centre. Although Prime Zone A rents in the city centre are relatively high (£1,507 per sq m at June 2006) they have remained static since 2000 whilst other competing centres in the sub-region have seen an increase in Prime Zone A rents. Discussions with local agents indicated that whilst there was strong demand for representation in the centre there was a lack of quality suitable high quality retail outlets. Other strengths noted by agents were affordable rents, flexible terms, a readily available workforce and good transport infrastructure. Yields in Bradford have fallen in recent years, indicating improvement to investor confidence in the centre, although they remain higher than those recorded in previous years. The business survey revealed that retailers felt the centre contained too many discount retailers and that there was a general lack of quality retailers in the centre.

5.08 Bradford contains some 65% of the top-twenty national high street retailers (as identified by FOCUS – 2007) and a range of other multiple retail, leisure and financial and business service operators. There is significant demand recorded by retailers for representation in the city centre, with some 72 retailers seeking up to 138,236 sq m (gross) of retail floorspace. Requirements are expressed by both retail and leisure operators, including Ask, Bathstore, Dunelm, Harvestor, Netto, Peacocks, Pizza Express, Toys ‘R’ Us and Zara. Accessibility to the city centre is good and is available by a range of means of transport, with the largest proportion of visitors interviewed in the on-street survey having arrived in the centre by bus, minibus or coach. Furthermore the majority of those that drove did not encounter any difficulty in obtaining a car parking space. Bradford was recognised as having good environmental quality in the main, with an historic and unique architecture.

**Table 5.1: SWOT Analysis of Bradford**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Strong comparison goods sector;</li> <li>• Good mix of independent traders and national multiples;</li> <li>• Historic city centre with distinctive architecture;</li> <li>• Good transport links by public transport and road;</li> <li>• Well maintained pedestrian environment;</li> <li>• Regional significant centre with strong civic function;</li> <li>• Culturally diverse centre with many specialist retailers;</li> <li>• Good leisure service offer in the wider city centre; and</li> <li>• Affordable rents and flexible terms of retail outlets.</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of development on the Broadway site;</li> <li>• High level of vacancies, many of which are of poor quality;</li> <li>• Lack of suitable retail premises for prospective traders;</li> <li>• Poor perception of the city centre;</li> <li>• Limited convenience provision;</li> <li>• Limited rental growth;</li> <li>• Lack of high quality retail traders;</li> <li>• Dominance of small retail outlets; and</li> <li>• Yields remain higher than ten years ago.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Broadway Shopping Centre Development;</li> <li>• Ongoing redevelopment of other</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of development of the Broadway site;</li> <li>• Lack of appropriate retail outlets for prospective retailers;</li> </ul>

<p>parts of the city centre, for example the City Park scheme;</p> <ul style="list-style-type: none"> <li>• Development of niche and specialist businesses;</li> <li>• New office development;</li> <li>• Continued growth of the city's educational institutions; and</li> <li>• Town Centre Management Framework.</li> </ul>	<ul style="list-style-type: none"> <li>• Continued growth of competing centres and out-of-centre retail destinations;</li> <li>• Possible migration of prime shopping area away from Kirkgate Shopping Centre once Broadway Shopping Centre is developed; and</li> <li>• Increased proliferation of discount retailers.</li> </ul>
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5.09 In conclusion whilst Bradford can be seen to be a strong comparison goods and leisure destination, its future growth will be restricted unless new high, quality, large retail outlets can be brought into the city centre. The Broadway Shopping Development should deliver these, although currently the inactivity on this site has led to a significant decline in retail floorspace within the city centre. Furthermore, as noted by agents many retailers were currently refraining from investing in the centre until this development is complete. 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**

5.10 Keighley is the second largest town centre in the District, after Bradford, containing 76,690 sq m of retail floorspace. It is situated in the 11 miles north west of Bradford and 27 miles west of Leeds. Due to its somewhat isolated location, it is a self-contained centre with a dedicated catchment. The Goad Town Centre (2006) surveys reveals that representation of both comparison and convenience floorspace is above the national average, whilst retail service, leisure services 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 mix of national multiples and independent traders, and includes a permanent indoor market hall.

5.11 In terms of outlet sizes in Keighley, the town centre is dominated by small outlets (under 93 sq m) which account for some 57% of total floorspace, compared to a national average of 39%. Analysis of vacancies in the town centre revealed that although the proportion of vacant outlets (15%) is above the national average (10%), the proportion of vacant floorspace (7%) is below the national average (9%). This shows that a high number of small outlets are currently vacant, most probably because they are not suitable for the requirements of modern retailers. Vacancies are located throughout the town centre, but are concentrated in greater numbers in peripheral areas. Between 2001 and 2006 vacant outlets and vacant floorspace have both increased.

- 5.12 With respect to national multiples the centre half of the top-twenty national high street retailers, as defined by FOCUS, in addition to a good range of high street banks and building societies. At October 2007 a total of 21 requirements were recorded by retailers for representation in the centre. Requirements are expressed by both retail and leisure operators, including Debenhams, Julian Graves, Health Rack, Peacocks Stores, Shoe Zone, TJ Hughes, TK Maxx and First Choice Holidays. Collectively, these retailers were seeking up to 20,026 sq m (gross) of retail floorspace. This level of requirements is lower than that recorded in previous years, and lower than the average of the last five years of 22 requirements.
- 5.13 Prime Zone A rents in Keighley at June 2006 were recorded as being £861 per sq m. Whilst this is lower than the nearby centres of Bradford, Halifax and Harrogate, rents have increased by some 45% since 1998. Yields in the centre are falling, indicating improvement to investor confidence, but they remain lower than yields recorded in 1996 and 1997. The centre is easily accessibility by private car or public transport. It contains a centrally located bus station and Keighley Train Station is situated adjacent to the town centre. Most business who responded to our business survey stated that at the current time they were trading either 'well' or 'very well' which illustrates a healthy local retail sector.

**Table 5.2: SWOT Analysis of Keighley**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Dedicated and loyal local catchment;</li> <li>• Second largest retail destination in the District;</li> <li>• Strong comparison and convenience sectors;</li> <li>• Good mix of national and independent operators;</li> <li>• Easily accessible by a range of transport modes;</li> <li>• Mix of different types of accommodation, ranging from purpose built Airedale Centre to Cavendish Retail Park and the Victorian Cavendish Street Arcade;</li> <li>• Centrally located bus station;</li> <li>• Businesses noted current trading performance was strong; and</li> <li>• Growing Prime Zone A rents.</li> </ul>	<ul style="list-style-type: none"> <li>• Under-represented retail service, leisure service and financial and business service floorspace;</li> <li>• High proportion of small vacant units;</li> <li>• Linkages between Airedale Centre and the rest of the town could be improved;</li> <li>• Lack of new modern larger units;</li> <li>• Relatively low level of retailer requirements;</li> <li>• Lower yields than in previous years; and</li> <li>• Lack of high quality retailers.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Relocation of Keighley Collage;</li> <li>• Future development of an ASDA store close to the town centre;</li> <li>• Active town centre management team;</li> <li>• Redevelopment of the indoor market and adjacent area of public open space; and</li> <li>• Expansion of the town centre</li> </ul>	<ul style="list-style-type: none"> <li>• Future development of an ASDA store close to the town centre;</li> <li>• Improve retail and leisure offer of competing centres and out-of-centre developments;</li> <li>• Perception of crime;</li> <li>• Continued expansion and increased range of goods sold at large format supermarkets; and</li> <li>• Lack of available retail stock may force perspective retail investors to locate elsewhere.</li> </ul>



5.14 Keighley is a somewhat unique centre in that it has a loyal catchment base due to its distance from competing centres. As such, the threat of an improved retail offer in competing centres such, such as Bradford, was noted by agents as being minimal. Consequently, the key challenge for Keighley in the future will be ensuring that enough retail and leisure developments are brought forward to cater for the needs of shoppers who use the centre, together with strong transport infrastructure. In addition, the issue of the high amount of small vacant outlets should be addressed.

### **Ilkley**

5.15 Ilkley contains 37,380 sq m of retail floorspace. 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 WYG consider the town centre to be adequately served in this regard. Indeed the centre contains a variety of specialist comparison traders and 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.

5.16 Although the majority of retail outlets in Ilkley (51%) are small (under 93 sq m), this is appropriate to the type of trader that it contains, as independents generally prefer smaller retail outlets (Goad, 2007). This is evidenced by the low level of retail outlets (3%) and retail floorspace (2%) that it contains. Currently there are some 18 retailers who have requirements for representation in the centre, who are seeking up to 11,823 sq m (gross) of floorspace. This includes a mix of both retail and leisure operators including Ask, Pizza Express, Dunelm, Costa, Netto, Oddbins, Superdrug and Zizzi. Recorded yields for Ilkley have fallen steadily over the past ten years, indicating improving investor confidence in the centre.

5.17 Ilkley contains a centrally located train and bus station with regular connections to Bradford and Leeds amongst other destinations. The centre is located close to the A65 road. Although the centre contains a number of car parks, 68% of traders who responded to our business survey stated that inadequate customer parking was their main barrier to trading performance. The centre provides a safe and pleasant environment for pedestrians. Half of shoppers felt that accessibility to Ilkley was either 'better' or 'much better' than accessibility to other shopping centres. Environmental quality in the town centre is good, with well maintained retail units and an array of street furniture.

**Table 5.3: SWOT Analysis of Ilkley**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>Convenience, retail service and financial and business service floorspace all above the national</li> </ul>	<ul style="list-style-type: none"> <li>Car parking availability and price is a serious issue;</li> </ul>

<ul style="list-style-type: none"> <li>average;</li> <li>• Low level of vacancies indicates a healthy retail sector;</li> <li>• Falling yields;</li> <li>• A high proportion of strong, specialist independent traders which provides a unique retail offer;</li> <li>• Good environmental quality;</li> <li>• Significant number of tourist visitors; and</li> <li>• Easily accessible by a range of means of transport.</li> </ul>	<ul style="list-style-type: none"> <li>• Lack of vacant units may prevent new retailers from locating in the centre; and</li> <li>• High proportion of small retail outlets serves to restrict the types of retailer that can locate in the centre.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Town centre expansion, although this was unpopular with most respondents to the business survey;</li> <li>• Growth in tourism to the centre through increased promotion of the centre;</li> <li>• Continued growth of the independent/specialist retail sector in Ilkley will underpin the town's unique retail offer; and</li> <li>• Refurbishment and upgrading of quality and configuration of current stock.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased pressure from competing centres and out-of-centre retail destinations;</li> <li>• Lack of available outlets in the town centre-retailers may choose to locate elsewhere;</li> <li>• Town centre expansion is difficult due to the constrained nature of the centre;</li> <li>• Lack of town centre management team or local traders group;</li> <li>• Increased competition from supermarkets selling a wider range of non-food goods; and</li> <li>• A national economic downturn may hit specialist traders the hardest.</li> </ul>

5.18 Ilkley is clearly a healthy, vital and viable 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. Environmental quality in the town centre is excellent and is easily accessible. In terms of the future of the centre, it will be necessary to balance the delivery of new retail floorspace to ensure that it retains/improves its market share and its retail offer with preserving the good quality environment and independent/specialist nature of the businesses that it contains.

### Shipley

5.19 Shipley is ranked 700<sup>th</sup> nationally in the Venuescore (2006) ranking of retail centres. The Goad Town Centre survey (2006) identifies the centre to have 38,800 sq m of retail floorspace. Retailing in the centre is dominated by a large-format ASDA superstore off Manor Road which offers a range of comparison and convenience goods. The town contains a permanent indoor market, although this is of poor environment quality and offers a limited range of goods. An outdoor market is also held in the towns' Market Square three times a week, containing further convenience and comparison goods provision. 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.

- 5.20 As with the other town centres in Bradford, 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 as being of poor quality. The occurrence of vacancies in the centre was seen to have increased between 2001 and 2006. The centre contains five of the top twenty national high street retailers including Boots, Woolworths, Argos, Superdrug and Wilkinson. The centre currently has a low demand for representation from retailers, with just four requirements recorded. These operators include Barracuda, Café Nero, Dunelm Soft-Furnishings and Peacocks Stores. This compares to an average of seven requirements over the last five years. 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.
- 5.21 Shipley has a centrally located bus station that provides 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 during the day-time. The town centre contains a number of car parks, although the largest of these, namely Ivar Way multi-storey and Manor Road, are located adjacent to the ASDA store, with limited parking elsewhere in the town centre. Pedestrian movement around the centre is unproblematic. The environmental quality of the town centre was variable, and the on-street survey indicated most shoppers (77%) visited the centre for two hours or less.

**Table 5.4: SWOT Analysis of Shipley**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Strong convenience retail destination;</li> <li>• Retail service and financial and business service floorspace both above the national average;</li> <li>• Contains both an indoor and outdoor market</li> <li>• Shipley has risen up the national rankings between 2005 and 2006, according to Venuescore; and</li> <li>• Accessibility by public transport is good.</li> </ul>	<ul style="list-style-type: none"> <li>• Comparison and leisure service floorspace recorded as being below the national average;</li> <li>• High proportion of vacancies when considered against the national average;</li> <li>• ASDA dominates retail provisions, extent of linked trips to the rest of the town centre is unclear;</li> <li>• Environmental quality of the centre needs improving; and</li> <li>• Limited demand for space.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Expansion of the town centre;</li> <li>• Town Centre Management Framework;</li> <li>• Redevelopment of the built environment;</li> <li>• Improvement of the environmental quality of the centre; and</li> <li>• Improvement of the retail stock in the town centre to provide better quality outlets; and</li> <li>• Increase links to Saltaire tourist potential.</li> </ul>	<ul style="list-style-type: none"> <li>• Continued growth of competing centres and out-of-centre retail destinations;</li> <li>• ASDA's dominance of the retail market could increase if further non-food goods are sold;</li> <li>• Environmental quality remains unchanged; and</li> <li>• Lack of suitable vacant outlets will restrict retailers that will come into the centre.</li> </ul>

5.22 Shipley is predominantly a destination for convenience shopping, although ASDA dominates the retail market. Indeed from discussions with agents the prime shopping area was seen to be focused on the ASDA and the adjacent outlets. Diversification of the town centres retail offer would 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. Environmental improvements would also help to increase the attractiveness of the town centre.

### **Bingley**

5.23 Located seven miles to the north-west of Bradford, Bingley is the smallest town centre within some 15,940 sq m of retail floorspace (Goad, 2005). It has a limited shopping function and occupies a role predominantly in providing for the day to day needs of the local population. This is indicated in the diversity of uses present in the centre, with the proportion of both comparison and convenience floorspace being below the national average whilst the proportion of leisure service, retail service and financial and business service floorspace all above the national average. It is significant to note that Venuescore (2006) ranks the centre 1,946<sup>th</sup> nationally, which represents a decline of 664 places since 2005.

5.24 Bingley is dominated by small retail outlets of less than 93 sq m. Such outlets represent 62% of all outlets compared to a national average of 39%. Indeed the only large-format retail accommodation in Bingley is situated in the Myrtle Walk Shopping Centre. The centre has a large representation of vacancies with both the proportion of vacant floorspace and vacant outlets being above the national average. However, vacancies have declined markedly since 2001. Many vacant outlets are situated in the Myrtle Walk Shopping Centre which itself is poorly lit and of poor environmental quality. It would be beneficial for the town if an appropriate redevelopment scheme for the shopping centre could be secured.

5.25 The centre benefits from good accessibility on foot with pedestrian movement around the centre is unproblematic. The town centre contains a centrally located train station with services to Skipton, Keighley, Bradford and Leeds. The centre contains a large amount of off-street parking, although from discussions with the Town Centre Manager and analysis of the business survey responses it is apparent that off-street parking in the centre is frequently full. Much of Bingley Town Centre is currently being redeveloped which will see a new Town Square created together with improvements to the main shopping street (Main Street) which provides on-street parking spaces, raised pedestrian crossings, new bus lay-bys and traffic calming measures.

**Table 5.5: SWOT Analysis of Bingley**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Strong provider of services;</li> <li>• Good mix of independent traders and</li> </ul>	<ul style="list-style-type: none"> <li>• Declined significantly in the Venuescore rankings between 2005 and 2006;</li> </ul>

<ul style="list-style-type: none"> <li>national multiples</li> <li>Easily accessible by a range of different modes of transport;</li> <li>Currently subject to redevelopment schemes to improve vehicular transport through the centre and improve pedestrian movement;</li> <li>Town Square under construction;</li> <li>Location of Bradford and Bingley offices; and</li> <li>Active Town Centre Management Team.</li> </ul>	<ul style="list-style-type: none"> <li>Comparison retail poorly provided;</li> <li>Vacancies are above the national average in terms of both proportion of outlets and floorspace;</li> <li>Myrtle Walk Shopping Centre of poor environmental quality; and</li> <li>Off-street parking facilities are frequently over-subscribed.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>Improvements to Main Street;</li> <li>Development of the Town Square;</li> <li>Redevelopment of the Myrtle Walk Shopping Centre;</li> <li>Expansion of the town centre;</li> <li>Provision of larger retail outlets in the town centre; and</li> <li>Town Centre Management Framework.</li> </ul>	<ul style="list-style-type: none"> <li>Lack of change in the Myrtle Walk Shopping Centre;</li> <li>Continued growth of competing centres and out-of-centre retail destinations;</li> <li>No development of larger retail outlets may prohibit new retailers from moving into the centre; and</li> <li>Continued problems with off-street parking may be detrimental in encouraging shoppers to the centre.</li> </ul>

5.26 In conclusion Bingley was seen 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 from 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 Bingley.

### District Centres

5.27 For the seven district centres in the District, a brief SWOT analysis of the main findings of the vitality and viability assessments is shown below.

### Five Lane Ends

5.28 Five Lane Ends District Centre incorporates the Enterprise 5 Retail Park on Bradford Road and nearby outlets on Norman Lane and Highfield Road. It is situated less than two miles to the north east of Bradford City Centre. The Enterprise 5 Retail Park is mainly occupied by large-format retailers including the anchor Wm Morrisons supermarket and Wickes DIY store, although it contains a Shopping Mall area which incorporates smaller outlets.

**Table 5.6: SWOT Analysis of Five Lane Ends District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>Strong destination for comparison and convenience goods;</li> <li>Proportion of vacant floorspace is</li> </ul>	<ul style="list-style-type: none"> <li>Retail services, leisure services and financial and business services under-represented when considered against the national average;</li> </ul>

<p>significantly below the national average;</p> <ul style="list-style-type: none"> <li>• The centre is easily accessible and has ample car-parking; and</li> <li>• Environmental quality of the centre generally good.</li> </ul>	<ul style="list-style-type: none"> <li>• Extent of linked trips between Enterprise 5 Retail Park and the rest of the centre is unclear; and</li> <li>• Low percentage of visitors indicated that they visited the centre during the evening/night-time.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Improved linkages between Enterprise 5 Retail Park and the rest of the centre;</li> <li>• Expansion of the district centre;</li> <li>• Diversify uses in the centre, principally service uses; and</li> <li>• Improvements to the built environment.</li> </ul>	<ul style="list-style-type: none"> <li>• Reliance on private car to reach the centre, with 68% of visitors arriving this way;</li> <li>• Continued growth of competing centres and out-of-centre retail destinations;</li> <li>• Limited interaction between the Retail Park and the rest of the centre; and</li> <li>• Lack of available outlets may prohibit new retailers moving into the centre.</li> </ul>

## Girlington

- 5.29 Girlington District Centre partly comprises a retail park with large-format outlets together with an adjacent area of more traditional, smaller retail outlets. The centre is located at the busy junction of Thornton Road (the B6145) and Ingleby Road (the A6177).

**Table 5.7: SWOT Analysis of Girlington District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Good representation in the comparison and convenience retail sectors;</li> <li>• Proportion of retail service floorspace is above the national average;</li> <li>• Low proportion of vacant floorspace;</li> <li>• Benefits from good accessibility.</li> </ul>	<ul style="list-style-type: none"> <li>• Low provision of leisure services and financial and business services;</li> <li>• A high proportion of small vacant outlets;</li> <li>• Appeared to be limited linkages between different parts of the centre;</li> <li>• Low footfall along Thornton Road; and</li> <li>• Thornton Road and Ingleby Road busy with vehicular traffic.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Improving linkages between the different parts of the centre;</li> <li>• New retail development within the district centre boundary;</li> <li>• Diversify service uses present in the centre;</li> <li>• Environmental improvements to retail outlets along Thornton Road</li> </ul>	<ul style="list-style-type: none"> <li>• Continued growth of competing centres and out-of-centre retail destinations;</li> <li>• Continued separation between retailers on Thornton Road and retailers in the Victoria Centre; and</li> <li>• Increase in traffic using Thornton Road and Ingleby Road would impact negatively on access to and around the centre.</li> </ul>

## Great Horton

- 5.30 This District Centre is situated less than two miles to the south-west of Bradford City Centre. Great Horton is linear in nature situated on either side of Great Horton Road (the A647) which connects Bradford to Queensbury and Halifax. The centre has a large Tesco Extra store located immediately adjacent the district centre.

**Table 5.8: SWOT Analysis of Great Horton District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Good representation from retail services, leisure services and</li> </ul>	<ul style="list-style-type: none"> <li>• Proportion of comparison outlets and comparison floorspace both significantly below</li> </ul>

financial and business services; <ul style="list-style-type: none"> <li>• Proportion of convenience floorspace comparable to the national average;</li> <li>• Tesco supermarket located in an edge-of-centre location; and</li> <li>• Easily accessible.</li> </ul>	the national average; <ul style="list-style-type: none"> <li>• Vacancies are above the national average;</li> <li>• Lack of public toilets; and</li> <li>• Great Horton Road is busy with vehicular traffic.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Expansion of the centre;</li> <li>• Improved linkages between the Tesco and the rest of the centre; and</li> <li>• Improved comparison goods offer of the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Diversification of the type of goods sold in the Tesco store may take trade from retailers in the district centre;</li> <li>• Increased traffic on Great Horton Road; and</li> <li>• Increased competition from other centres or out-of-centre locations.</li> </ul>

## Greengates

5.31 Greengates District Centre is located to the east of Bradford District adjacent to the Leeds City Council authority boundary. The local centre is located at the intersection of the A657, which connects east to Leeds and west to Shipley, and the A658 which links to Bradford to the south and Leeds Bradford Airport and Harrogate to the north east. It lies some 3 miles north east of Bradford City Centre. Retailing outlets are located on Harrogate Road and New Line. Retailing in the centre comprises a mixture of large format retail warehouses and smaller outlets.

**Table 5.9: SWOT Analysis of Greengates District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Proportion of comparison and convenience floorspace both above the national average;</li> <li>• Evidence of new retail build in the centre;</li> <li>• Proportion of vacant floorspace is significantly below the national average;</li> <li>• Good mix between independent retailers and national multiples; and</li> <li>• Easily accessible by a range of means of transport</li> </ul>	<ul style="list-style-type: none"> <li>• All sub-categories of service uses are under-represented in terms of the proportion of floorspace for which they account when considered against the national average;</li> <li>• Proportion of vacant outlets is above the national average;</li> <li>• Extent of linked trips between the Harrogate Road Retail Park and the rest of the centre is unclear; and</li> <li>• Harrogate Road is busy with vehicular traffic which is hazardous for pedestrians and affects environmental quality.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Improved linkages between Harrogate Road Retail Park and the rest of the centre;</li> <li>• Further new retail build in the centre;</li> <li>• Diversification of the retail offer of the centre with respect to services; and</li> <li>• Expansion of the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased competition from other centres or out-of-centre locations;</li> <li>• Continued presence of a high proportion of vacant small outlets;</li> <li>• Increased range of goods sold in Sainsburys may impact on other traders in the centre; and</li> <li>• Increased traffic along Harrogate Road/New Line.</li> </ul>

## Mayo Avenue

- 5.32 Mayo Avenue is a small District Centre comprising just three retail outlets. It is located less than two miles south of Bradford City Centre adjacent to the junction of the A6177 and A641 roads. The A6177 connects directly to the M606 less than a mile to the south east.

**Table 5.10: SWOT Analysis of Mayo Avenue District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Strong comparison and convenience representation;</li> <li>• Easily accessible;</li> <li>• No vacant floorspace</li> <li>• National multiples; and</li> <li>• Large amount of free off-street parking.</li> </ul>	<ul style="list-style-type: none"> <li>• No representation from leisure services or financial and business services and very limited representation from retail services;</li> <li>• Only three retail outlets present;</li> <li>• The centre does not contain the recommended retail outlets and services for a district centre as contained in PPS6.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Diversify retail offer;</li> <li>• Provision of smaller outlets to allow other retail and service traders to locate in the centre; and</li> <li>• Expansion of the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Limited options to expand the district centre;</li> <li>• Lack of vacant outlets; and</li> <li>• Increased traffic on Mayo Avenue would make it problematic to access and exit the centre.</li> </ul>

## Thornbury

- 5.33 This District Centre is located in the south east of the District close to the local authority boundary with Leeds City Council. Thornbury District Centre is situated on either side of Leeds Road/Leeds Old Road (the A647). It is dominated by purpose built large-format retailers, although smaller retail outlets are also present.

**Table 5.11: SWOT Analysis of Thornbury District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Primarily a destination for convenience shopping with good representation in this sector;</li> <li>• Proportion of comparison retail floorspace (38%) comparable to the national average (39%);</li> <li>• Movement around the centre is unproblematic; and</li> <li>• Mixture of national multiples and independent traders in the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Poor representation from retail services, leisure services and financial and business services, all of which are below the national average;</li> <li>• Thornbury does not feel like a cohesive centre, and the extent of trips between retailers within it is unclear;</li> <li>• Proportion of both vacant outlets and vacant floorspace is below the national average; and</li> <li>• Car dominated centre.</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Redevelopment of the large vacant outlet on Hawthorne Street;</li> <li>• Better integration of different parts of the centre;</li> <li>• Improvements to the built environmental; and</li> <li>• Diversification of the retail offer.</li> </ul>	<ul style="list-style-type: none"> <li>• Dominance of a few large national multiples;</li> <li>• Increased competition from other centres or out-of-centre locations;</li> <li>• Increased separation of the retailers on Leeds Old Road and the rest of the centre; and</li> <li>• Continued high occurrence of vacancies.</li> </ul>



## Tong Street

- 5.34 Tong Street is situated approximately two miles south-east of Bradford City Centre close to the boundary with Kirklees Council authority area. It is located either side of Tong Street (the A650) which connects to Bradford City Centre to the north-west and to Junction 27 of the M62 five miles to the south-east. The centre consists of the Avenue Retail Park (formerly Weaverthorpe Retail Park) and smaller outlets along Tong Street itself.

**Table 5.12: SWOT Analysis of Tong Street District Centre**

<b>Strengths</b>	<b>Weaknesses</b>
<ul style="list-style-type: none"> <li>• Good convenience goods provision;</li> <li>• Strong leisure service sector;</li> <li>• Good mix between independent traders and national multiples;</li> <li>• Evidence of new build retail outlets in the centre; and</li> <li>• Easily accessible by a range of means of transport.</li> </ul>	<ul style="list-style-type: none"> <li>• Poor quality environment;</li> <li>• High proportion of vacant outlets and vacant floorspace;</li> <li>• Retail services, comparison goods provision and financial and business services all under-represented in terms of retail floorspace; and</li> <li>• Tong Street is busy with traffic</li> </ul>
<b>Opportunities</b>	<b>Threats</b>
<ul style="list-style-type: none"> <li>• Redevelopment of Avenue Retail Park;</li> <li>• Diversification of the retail and service offer within the centre;</li> <li>• Improvements to the built environment of the centre; and</li> <li>• Enhancements to pedestrian movement around the centre.</li> </ul>	<ul style="list-style-type: none"> <li>• Increased competition from other centres or out-of-centre locations;</li> <li>• Increased traffic along Tong Street; and</li> <li>• Further decline in the environmental quality of the centre; and</li> <li>• Failure to find new occupants for vacant outlets.</li> </ul>

## Summary

- 5.35 This section has looked at the vitality and viability assessments undertaken with respect to the District's five Town centres and seven District Centres. It should be noted that similar assessments have been undertaken for the District's 40 Local Centres, and these are contained in this report at **Appendix 8**. Table 5.13 below indicates the total amount of convenience and comparison floorspace present within each of the Town, District and Local Centres.

**Table 5.13: Distribution of Retail, Services and Vacant Floorspace within Bradford's Defined Centres**

<b>Type of Centre</b>	<b>Centre</b>	<b>Retail floorspace (sq m)<sup>1</sup></b>	<b>Convenience Retail floorspace (sq m)</b>	<b>Comparison Retail floorspace (sq m)</b>	<b>Service Floorspace (sq m) [5]</b>	<b>Vacant</b>
<b>Town Centres [1]</b>	Bingley	15,940	1,960	3,300	9,090	1,590
	Bradford	98,730	8,320	52,450	27,830	10,130
	Ilkley	37,380	8,720	13,590	14,300	770
	Keighley	76,060	19,200	33,390	18,980	4,490
	Shipley	38,800	9,330	9,330	15,200	4,940
<b>District Centres [2]</b>	Five Lane Ends	21,579	9,785	8,956	2,628	210
	Girlington	25,859	10,570	9,746	4,703	840

	Great Horton	7,339	989	1,229	4,451	670
	Greengates	18,160	5,195	9,737	2,709	519
	Mayo Avenue	9,644	6,798	2,497	349	
	Thornbury	18,076	9,027	6,821	664	1,524
	Tong Street	11,030	2,707	2,707	4,279	1,337
<b>Local Centres [3]</b>	All	124,821	25,321	31,810	18,984	39,755
<b>Freestanding Retail warehouse parks and solus units [4]</b>	All	76,527	8,515	68,012	-	-

1 Town Centres taken from latest Goad Surveys (2005 and 2007)

2 District Centres taken from White Young Green Survey (2007)

3 Local Centres taken from White Young Green Survey (2007) of all 40 local centres

4 Freestanding Retail Warehouse and solus units taken from Retail Floorspace update 31<sup>st</sup> March 2008 produced by CBMDC

5 Figures include combined Retail Service, Leisure Service and financial and business services categorises from Goad

These figures are taken from Goad, and represent neither gross or net floorspace.

## 6 SHOPPING PATTERNS WITHIN THE STUDY AREA

### Introduction

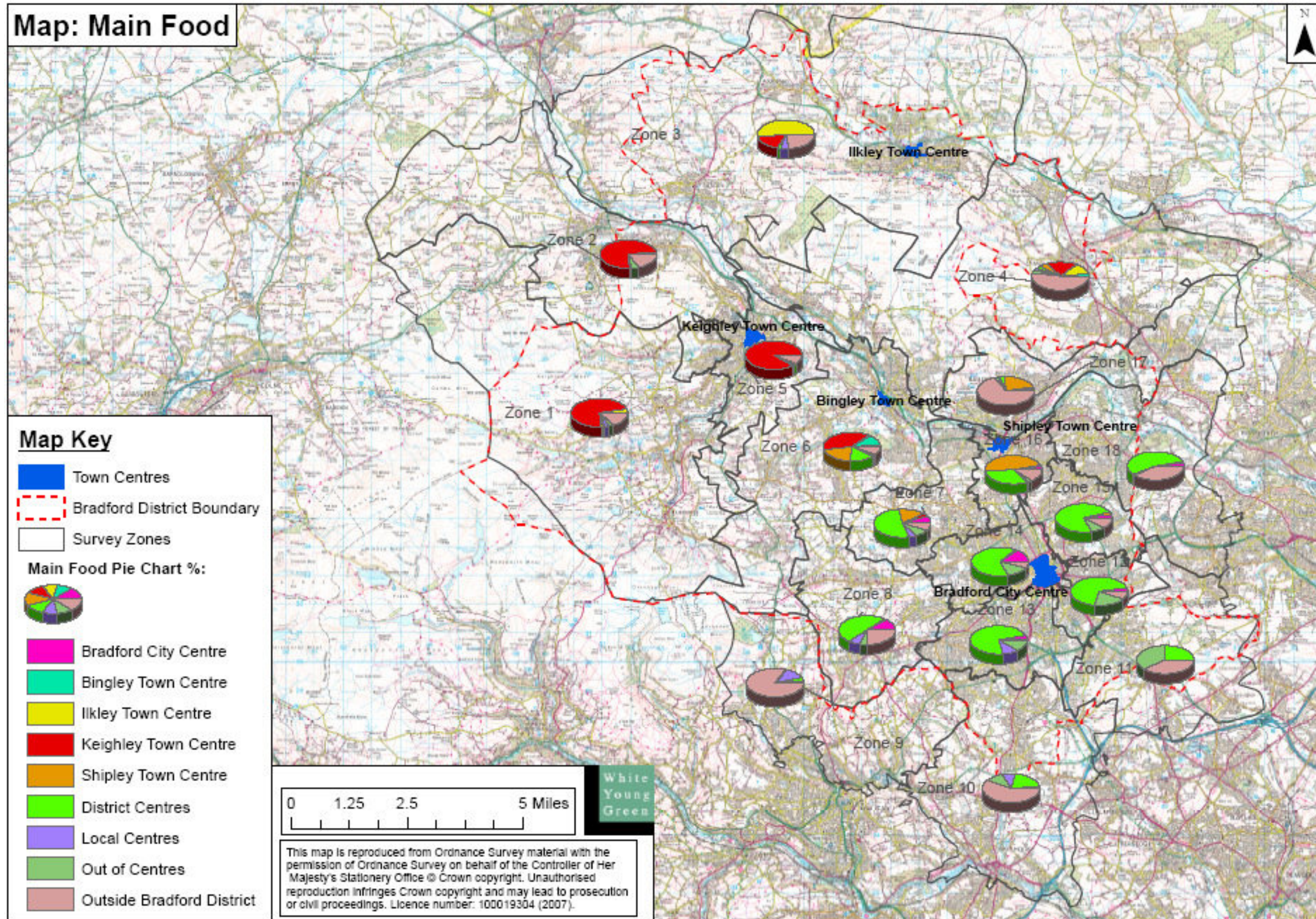
- 6.01 As previously highlighted, a key element of the study was to obtain a detailed understanding of the potential catchment of existing centres within the District. A detailed breakdown of the market shares achieved by each centre/store is contained at **Appendix 9 and 10**. This section is concerned with the market share of existing centres/facilities based on shopping trips rather than the amount of expenditure generated.

### Food Shopping Patterns

#### *Main Food Shopping Patterns*

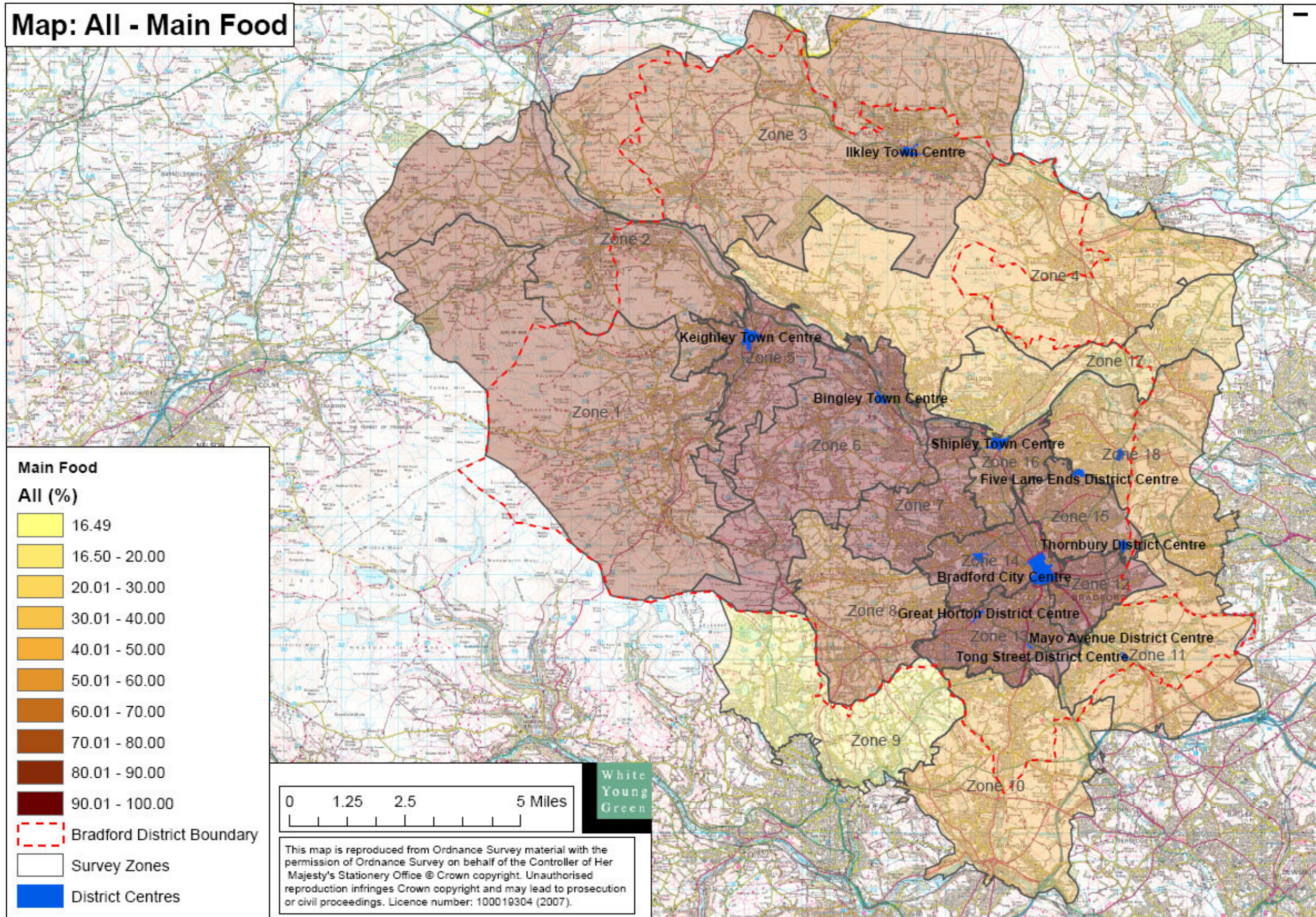
- 6.02 Within the Study Area as a whole, facilities in the District retain some 72% of main food shopping trips. 26% of main food shopping trips being directed towards destinations outside of the District with the residual 2% of main food shopping trips being conducted over the internet.
- 6.03 It is evident from examination of the statistical tables that Town Centres in Bradford account for 25% of all shopping trips in the Study Area. District Centres account for 35% of shopping trips in the Study Area with Local Centres and other out-of-centre destinations responsible for 4% and 8% of shopping trips respectively. Leakage is predominately to destinations in Leeds (15%) and Calderdale (9%).
- 6.04 With respect to the most popular stores identified for main food shopping within the District, these are Morrisons, Worth Way, Keighley (9%); Morrisons, Young Street, Bradford (8%); Morrisons, Mayo Avenue, Bradford (8%); Morrisons, Bradford Road, Five Lane Ends (7%); ASDA, Manor Lane, Shipley (6%); and Morrisons, Thornbury (6%). In terms of foodstores outside of the District, the Morrisons, Otley Road, Guiseley (Leeds authority area) is the most popular, attracting 5% of main food shopping trips by residents of the Study Area.

Figure 6.1: Main Food Destinations in Each Survey Zone



- 6.05 Keighley had the largest percentage of main food shopping trips directed to it out of all defined centres in the District, with 13% of trips. This is due to the presence of the Morrisons store at Worth Way (9%) and the Sainsburys at Cavendish Street (4%) which lie within the defined town centre. Shipley retains some 6% of shopping trips attributed to the ASDA store within it, which compares to 3% in Ilkley, 3% in Bradford and less than 1% in Bingley.
- 6.06 Retained within the defined District Centres in Bradford District is as follows: Girdlington (8%), Mayo Avenue (8%), Five Lane Ends (7%), Thornbury (6%), Great Horton (4%- N.B. this includes the Tesco store which is in an edge-of-centre location), Greengates (2%) and Tong Street (less than 1%).
- 6.07 Important freestanding stores include ASDA, Rooley Lane, Bradford (4%) and Tesco, Valley Road (1%). The only Local Centre to attract any significant proportion of main food shopping trips is Buttershaw, which contains a large-format Tesco and attracts 2% of trips.
- 6.08 Zones 12, 13, 14 and 15 of the Study Area cover Bradford City Centre and the surrounding area. Unsurprisingly retention of main food shopping trips in these zones is high with retention above 89% in all of these zones. Shopping trips are however directed mainly to stores within District Centres, rather than freestanding stores or the City Centre itself. Across Zones 12, 13, 14 and 15 District Centres account an average of 71% of shopping trips, and a minimum of 67% in each zone.
- 6.09 Keighley is covered by Zones 1, 2 and 5 of the Study Area. Retention of main food shopping trips within these zones is similarly high, with retention being 82% or above in each zone. The majority of these trips are directed to stores in Keighley Town Centre, which has a market share of 72% in Zone 1, 74% in Zone 2 and 89% in Zone 5.

Figure 6.2: Market Penetration (%) of All Main Food Facilities in Bradford District



- 6.10 With respect to the centres focused on Shipley, whilst retention of shopping trips is high in Zone 16 (87%) although retention in Zone 17 is just 32%. From examination of the statistical tables it is evident that the majority of this leakage is account for by destinations in Leeds which attract some 64% of main food shopping trips. Particularly popular are the Morrisons, Yeadon (37%) and Morrisons, Otley Road, Guiseley (26%). In Zone 16 Shipley attracts 46% of shopping trips, all of which is directed to the ASDA and Manor Lane. A further 16% of shopping trips are directed to the Morrisons at Five Lane Ends.
- 6.11 Bingley Town Centre is situated in Zone 6 of the Study Area. Within this Zone 92% of main food shopping trips are retained by destinations in the District although Bingley itself only retains 10% of shopping trips. Facilities in Keighley attract the greatest market share (40%), followed by Shipley (21%).
- 6.12 In Zone 3 which covers Ilkley some 76% of main food shopping trips are retained by destinations within the District. Shopping trips are mainly directed towards Ilkley which has a market share of 51%. The most popular stores in this Zone are Tesco, Spring Lane, Ilkley (23%) and Tesco Express, Riverside, Ben Rhydding, Ilkley (20%).
- 6.13 The retention of shopping trips is lowest in the Zones which straddle the District Centre boundary, with main food shopping trip retention lowest in Zone 9 (16%), Zone 10 (43%), and Zone 17 (32%).

*Top-up Food Shopping*

- 6.14 Facilities within the District attract approximately 77% of top-up trips by residents of the Study Area. This is higher than the retention of main food shopping trips identified above (72%) reflecting the preference for people to shop locally for top-up shopping goods rather than travelling larger distances to visit large shopping stores. The remaining 23% of shopping trips are leaked to destinations outside of the Study Area, principally Leeds (13%) and Calderdale (8%).
- 6.15 In terms of destinations within Bradford District, Town Centres attract 21% of shopping trips in the Study Area. The most popular town centre is Keighley (8%), followed by Shipley (6%), Bradford (3%), Ilkley (3%) and Bingley (2%).
- 6.16 A total of 18% of shopping trips are directed towards defined District Centres. The most popular District Centre is Great Horton (5%), followed by Five Lane Ends (3%), Girdlington (3%), Mayo Avenue (3%), Greengates (2%), Thornbury (2%) and Tong Street (less than 1%).

Figure 6.3: Market Penetration (%) of All Top-Up Food Facilities in Bradford District

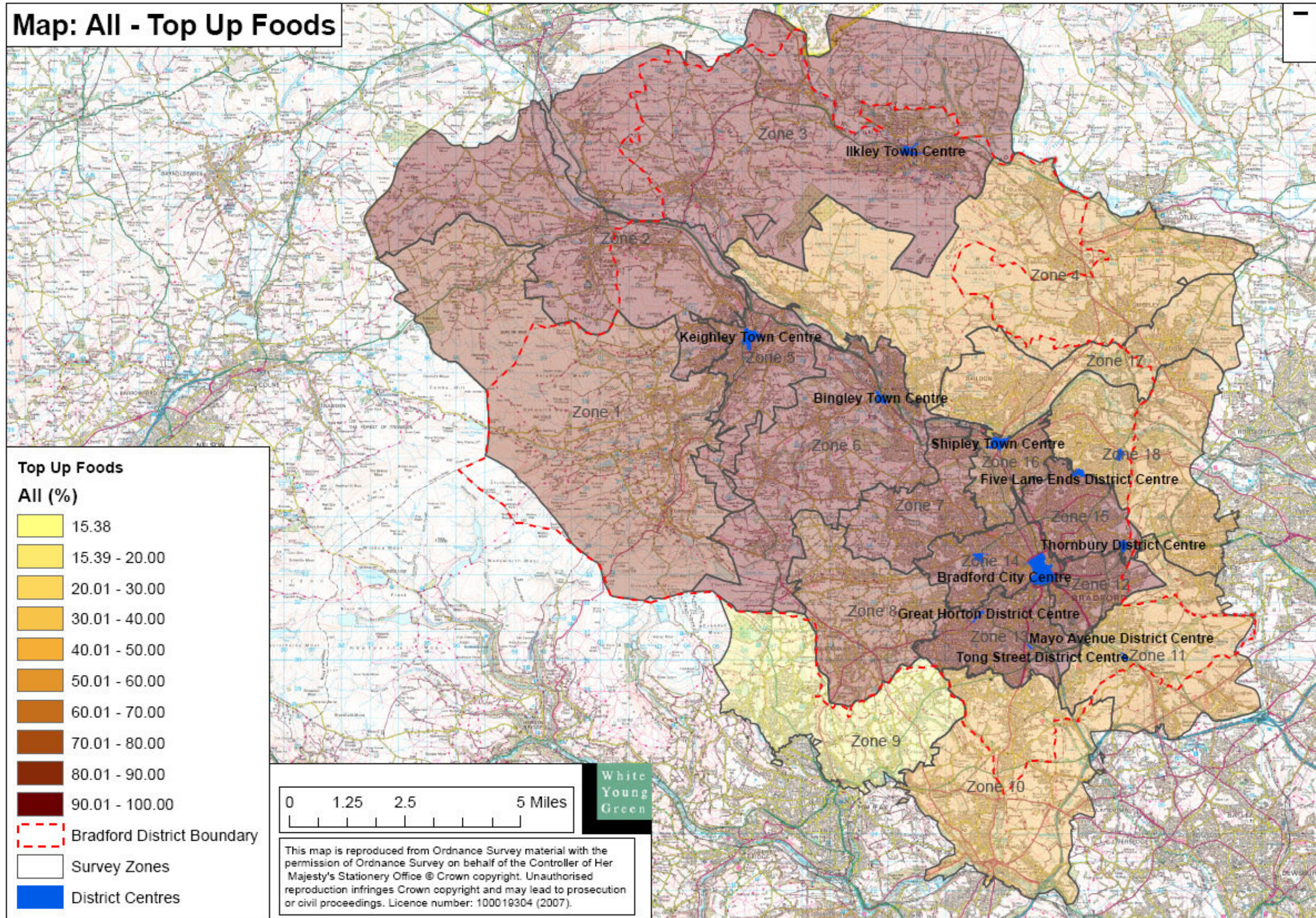
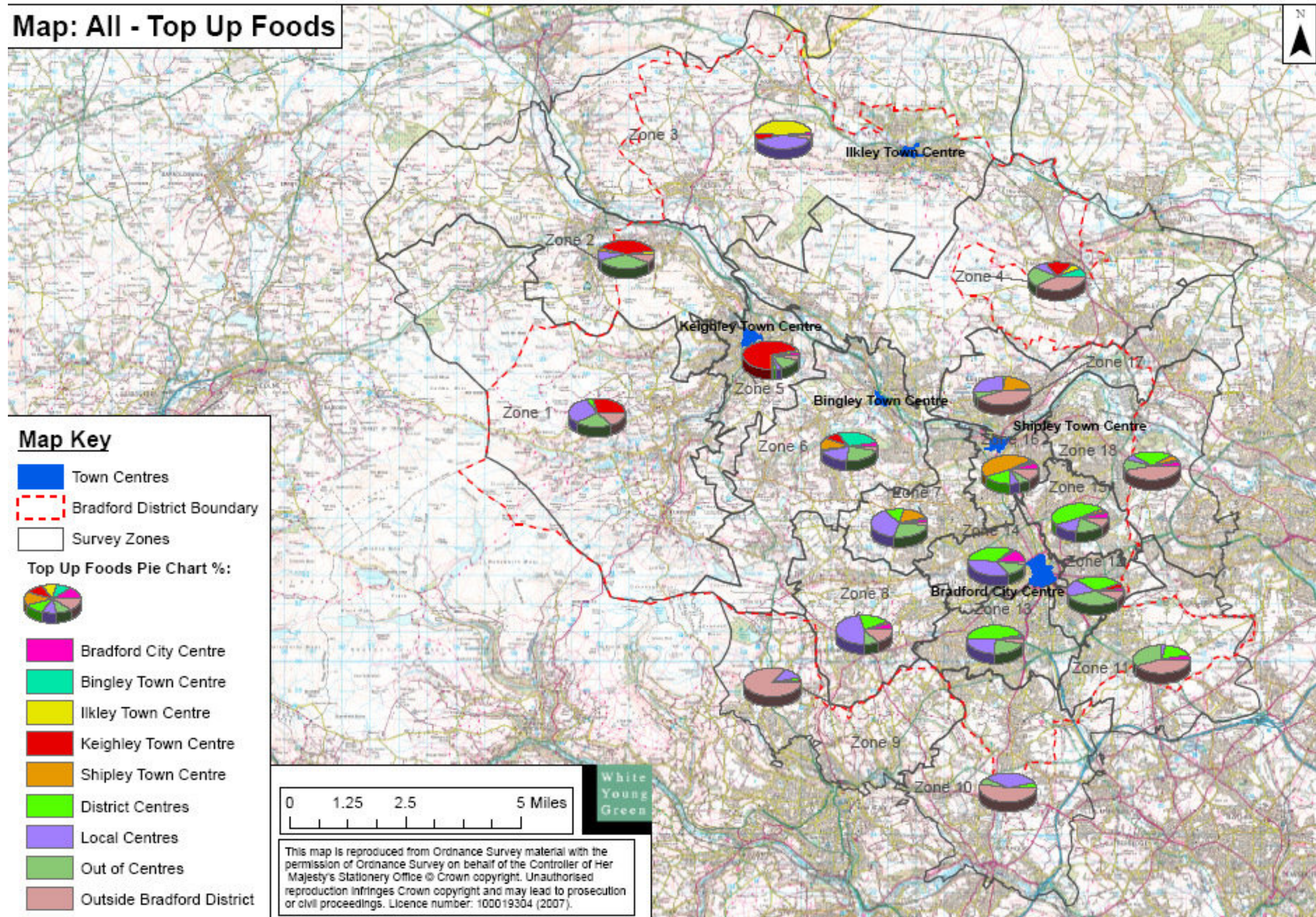




Figure 6.4: Top-Up Food Destinations by Survey Zone



- 6.17 Local Centres attract a significantly higher proportion of top-up shopping trips (21%) compared to main food shopping trips (4%). This is to be expected given their role in providing small-scale, everyday goods and services to residents of the District. Other destinations outside of defined centres attract 16% of shopping trips made by residents of the Study Area.
- 6.18 As would be expected, a higher number of destinations appear in the list of named top-up shopping destinations. As such, the relative retention of single stores is lower than that recorded for main food shopping. However, popular top-up food destinations are: ASDA, Manor Lane, Shipley (5%); Tesco Extra, Great Horton Road, Bradford (4%); Morrisons, Worth Way, Keighley (3%); Morrisons, Bradford, Five Lane Ends (3%); Morrisons, Mayo Avenue (3%) and ASDA, Rooley Lane, Bradford (3%). Outside of the District, the most popular destinations for top-up shopping are Morrisons, Otley Road, Guiseley (2%); ASDA, Owlcotes Shopping Centre, Pudsey (2%); and Morrisons, Yeadon, Leeds (2%).
- 6.19 In the Bradford City Centre primary zones (Zones 12, 13, 14 and 15) retention of top-up shopping trips by destinations in the District is high, with retention of at least 91% in all of the four Zones. This is directed to a mixture of District Centres, which have an average retention across the four zones of 40%, Local Centres (23% average retention), out-of-centre facilities (23% average retention) and Town Centres (8% average retention).
- 6.20 Keighley draws the majority of top-up shopping trips from Zone 1 (29%), Zone 2 (42% and Zone 5 (69%). Overall retention of shopping trips by destinations in the District in these three zones is in excess of 86%. Whilst in Town Centres, and Keighley in particular attract the largest proportion of shopping trips (an average of 51% and 47% respectively), out of centre facilities are also popular with an average retention rate of 25%.
- 6.21 With regard to Shipley Town Centre, it draws top-up shopping trips predominantly from Zone 16 and Zone 17. Shipley accounts for some 47% of top-up shopping trips in Zone 16 and 21% of trips in Zone 17, most of which is directed towards the ASDA at Manor Lane. As with main food shopping trips, the higher retention of top-up shopping trips is recorded in Zone 16 (89%) compared to Zone 17 (56%). Retention is lower in Zone 17 because it transcends into the neighbouring Leeds authority area, with destinations in Leeds having a market share of 42% in this zone. Most of this is accounted for by Morrisons at Yeadon, Leeds which has a market share of 30% of shopping trips.
- 6.22 Ilkley Town Centre is covered by Zone 3, and retention of top-up food shopping trips by destinations in the District in this zone are high (96%). Indeed destinations in Ilkley account for 47% of top-up shopping trips in this zone of which most (22% of shopping trips) is directed towards Local Shops, Ilkley. A further 42% of top-up shopping trips are directed towards

defined Local Centres, principally Silsden, which has a market share of 35% and specifically the Co-op foodstore at Bridge Road, Silsden, which attracts 25% of shopping trips by residents in this zone.

- 6.23 Bingley draws the majority of shopping trips from Zone 6, with a market share of 31% in this zone. Town Centres in Bradford attract 53% of top-up shopping trips in this zone, with Local Centres attracting 19%, out of centre destinations attracting 24% and District Centres attracting some 2% of top-up shopping trips. Overall, retention of shopping trips by destinations in Bradford in this zone is 97%.
- 6.24 Across the Study Area, retention of shopping trips is generally high with all zones recording in excess of 50% retention of shopping trips except for Zone 9 (15%) and Zone 10 (48%). Leakage is particularly high in Zone 9 as it lies predominately outside the District. As such, some 83% of top-up food shopping trips in this zone are directed towards destinations in Calderdale, with the Sainsburys, Wade Street, Halifax (25%) and the Morrisons, Keighley Road, Illingworth, Halifax (17%) being particularly popular top-up food destination in this zone.

### **Non-food (Non-Bulky) Shopping**

- 6.25 The telephone survey undertaken by NEMS Market Research asked specific questions about what destinations households visited for a variety of comparison goods. These goods can be divided into bulky and non-bulky goods, with questions asked about shopping habits in relation to sub-sectors of each type of good. In this regard, questions were asked about specific non-bulky goods shopping trips in relation to the following sectors: 'clothing and footwear'; 'books, CDs and DVDs'; 'home furnishings, kitchen equipment, glass and china items'; 'toys, games, bicycles and recreation goods'; and 'chemist goods'. The shopping patterns identified with respect to each of these goods will now be examined in turn.

#### *Clothing and Footwear*

- 6.26 Across the Study Area as a whole, destinations with Bradford District account for approximately 52% of total clothing and footwear shopping trips. 43% of shopping trips for the purchase of clothing and footwear items are directed towards destinations outside of the District, with 5% of clothing and footwear shopping being carried out online.
- 6.27 Bradford City Centre is the most important destination for clothing and footwear shopping trips by residents in the Study Area, with a market share of 35%. Indeed, this is a significantly larger market share than the next most important clothing and footwear destination in the District of Keighley, which attracts 8% of trips. Other destinations within the

District which attract a meaningful proportion of clothing and footwear shopping trips include Forster Square Retail Park (3%), Ilkley (2%), Shipley (2%) and ASDA, Rooley Lane (1%). The attraction of Bingley in this sector is negligible, with a market share of less than 1%.

- 6.28 Outside of the District, Leeds accounts for the largest proportion of leakage, attracting 27% of clothing and footwear shopping trips. Within the Leeds authority area Leeds City Centre is the most popular destination with 14% of shopping trips directed to it, although White Rose Shopping centre (4%), Pudsey Town centre (3%) and the Owlcotes Centre, New Pudsey (3%). A further 7% of clothing and footwear shopping trips are directed towards Calderdale, and in particular Halifax Town Centre (6%), with 3% being directed towards Kirklees.
- 6.29 The retention of shopping trips by destinations in the District is greatest in Zone 14 (84%), Zone 13 (75%), Zone 12 (73%) and Zone 15 (73%). These covered the Bradford City Centre area and unsurprisingly the majority of trips in these zones are directed towards the City Centre, which attracts an average of 62% of shopping trips across these four zones. However, Bradford draws a significant proportion of shopping trips from all of the 18 survey zones.
- 6.30 Keighley Town Centre draws mainly from Zone 5 (50% of shopping trips) and Zone 1 (34%), whilst Shipley only draws significantly from Zone 16, with a 15% market share in this zone. In terms of Ilkley, whilst it draws a small proportion of shopping trips from a number of different zones, it is principally only an important clothing and footwear destination in Zone 3 within which it attains a market share of 20%.
- 6.31 In terms of destinations outside of the District, facilities in Leeds attract a sizable proportion of expenditure from all of the Zones in the Study Area. This is principally due to the strong performance of Leeds City Centre itself. Halifax Town Centre is an important destination in Zone 9, within which it attracts 57% of shopping trips for clothing and footwear purposes. Destinations in Calderdale as a whole attract some 60% of all clothing and footwear shopping trips made in Zone 9.
- 6.32 The internet attracted shopping trips from all of the survey zones, range from 2% of shopping trips in Zone 18 to 10% of shopping trips in Zone 12. The Household Survey highlighted the preference for shoppers to frequent city and town centres for clothing and footwear shopping trips, rather than favouring out-of-centre facilities or retail parks.

#### *Books, CDs and DVDs*

- 6.33 In terms of books, CDs and DVDs it is evident that facilities within the District attract 47% of shopping trips, with 32% of trips being directed towards destinations outside of the District

and a significant 22% of all purchases being carried out over the internet. This highlights the increasing importance of the online shopping on particular retail sectors.

- 6.34 Across the Study Area Bradford City Centre attracts a quarter of all shopping trips for the purchase of Books, CDs and DVDs. Bradford City Centre attracts shopping trips from all of the 18 Survey Zones, although it is most significant in Zone 13 (61%) and Zone 14 (64%).
- 6.35 Other notable destinations within the District for this type of goods include Keighley (8%), Ilkley (3%) and Shipley (3%). Keighley draws most of its shopping trips from Zone 5 (54%), Zone 2 (48%) and Zone 1 (38%), whilst Shipley draws predominately from Zone 16 (27%) and Ilkley from Zone 3 (43%).
- 6.36 In terms of leakage of trips outside of Bradford District, Leeds authority area accounts for a market share of 18%, with Leeds City centre itself accounting for 10% of shopping trips across the Study Area. Leeds draws the highest proportion of its shopping trips from Zone 4 (22%) and Zone 18 (26%). Calderdale attracts 6% of shopping trips for the purchase of books, CDs and DVDs, with Halifax Town Centre being the most significant destination (4%). Halifax Town Centre is particularly important in Zone 9 within which it attracts 49% of shopping trips.
- 6.37 Internet spending is prolific in all of the 18 survey zones. The greatest proportion of trips are attracted from Zone 1 within which 32% books, CDs and DVDs purchases are conducted using the internet, possibly due to the rural nature of this zone. However, the internet accounts for a minimum of 13% trips in across the 18 survey zones.

*Home furnishings, kitchen equipment, glass and china items'*

- 6.38 Bradford District retains the majority of shopping trips made by residents in the Study Area for the purchase of home furnishings, kitchen equipment, glass and china items, with a market share of 54%. 39% of shopping trips are made to facilities outside of the District and 7% are conducted over the internet.
- 6.39 Within the District, the most popular destinations are Bradford City Centre (26%), Keighley Town Centre (10%), Shipley (3%), Ilkley (2%), Great Horton District Centre (2%, although this includes the Tesco store) and Forster Square Retail Park (Phase 1 and 2) (2%). District Centres as a whole account for 7% of shopping trips, whilst Local Centres attract 2% of shopping trips and other out-of-centre destinations 2% of shopping trips.
- 6.40 Leaked shopping trips in this sector are directed towards Leeds authority area (22%), Calderdale (7%) and Kirklees (6%) for the most part. Leeds City Centre is once again an

important destination in this sector, attracting 11% of shopping trips and drawing from all 18 Survey Zones. Other key destinations outside of Bradford District are Halifax Town centre (5%) and Birstall Shopping Park (4%).

- 6.41 Bradford City Centre draws at least some shopping trips from all of the 18 Survey Zones, with the greatest proportion of trips recorded in Zone 14 within which it has a market share of 65%. Keighley is the most prolific destination in Zone 5 (59%), but is also important in Zone 1 (47%) and Zone 2 (45%).

*Toys, games, bicycles and recreation goods*

- 6.42 Facilities within the District attract a total of 55% of shopping trips by residents of the Study Area for toys, games, bicycles and recreation goods. Shopping trips for such purposes are directed to the following main destinations in the District: Bradford City Centre (30%), Keighley (12%), Forster Square Retail Park (4%), Shipley (3%) and Ilkley (2%). District Centres within Bradford account for a total of 3% of shopping trips, with out-of-centre destinations accounting for 2% of trips and Local Centres less than 1%. It is notable that Bingley Town Centre does not feature whatsoever in the statistical tables, indicating a lack of provision in this sector of non-bulky goods.
- 6.43 38% of shopping trips that are conducted by residents of the Study Area are directed towards destinations that lie outside of the Bradford District Boundary. These include destinations in Leeds authority area (20%), Kirklees (7%) and Calderdale (6%). Individual destinations of significance outside of the District include Leeds City Centre (9%), Birstall Shopping Park (5%), Halifax Town Centre (5%), White Rose Shopping Centre, Leeds (3%), Pudsey Town Centre (2%) and Otley (2%).
- 6.44 Retention by destinations in Bradford District is greatest in Zone 13 (86%), Zone 14 (81%), Zone 12 (76%) and Zone 5 (76%). Zones 13, 14 and 12 cover the Bradford City Centre area, and consequently Bradford City Centre attracts a sizable proportion of shopping trips in these zones. Zone 5 covers Keighley and within this zone Keighley Town Centre attracts 71% of all shopping trips which is the greatest proportion attracted to any single destination across the 18 survey zones. This demonstrates the dominance of Keighley in its catchment area.
- 6.45 Conversely, leakage is greater in Zone 9 (91%), Zone 18 (61%) and Zone 17 (59%). Zone 9 extends into Calderdale and hence the majority of shopping trips (71%) are directed to facilities in this authority area. Zone 17 and Zone 18 border Leeds and leakage is mainly to destinations in the Leeds area, principally Leeds City Centre itself which has a market share of 21% in Zone 17 and 25% in Zone 18.

6.46 Internet spending varies markedly from less than 1% of shopping trips in Zone 13 to 14% of shopping trips in Zone 16.

*Chemist goods*

6.47 The retention of shopping trips for chemist goods by destinations in the District is 69%. This is the highest retention rate out of any of the non-bulky goods categories, and indicates that people are not prepared to travel as far to purchase this type of goods compared to other sorts of non-bulky goods.

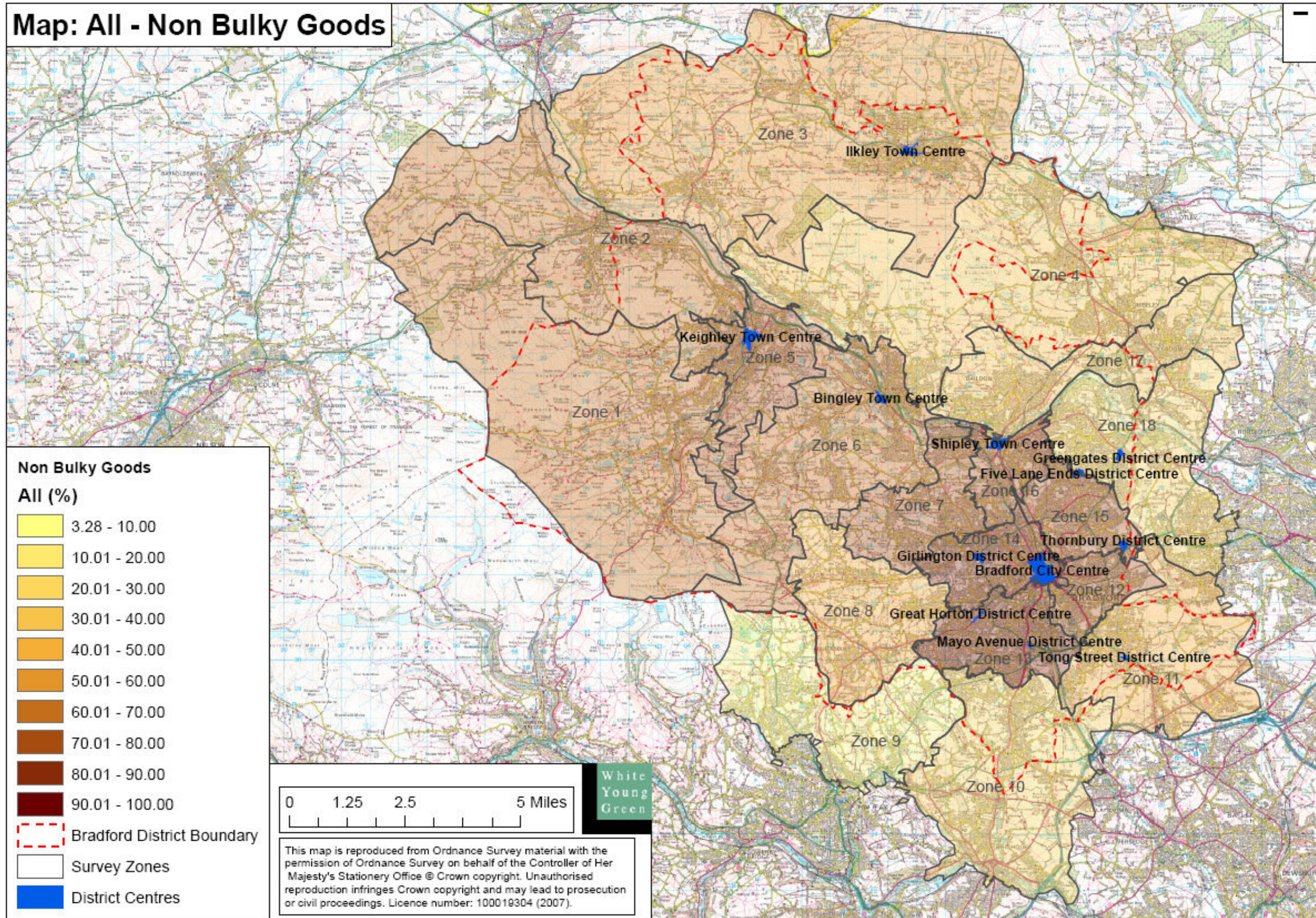
6.48 Retention of shopping trips for individual town centres is also higher than for other categories of non-bulky goods, with residents tending to shop in more local destinations for such goods. Bradford attracts 26% of shopping trips across the Study Area for chemist goods. This is followed by Keighley (12%), Shipley (4%), Ilkley (4%) and Bingley (2%).

6.49 In total the seven District Centres in the District account for 8% of shopping trips. Most notable with this are Great Horton District Centre and Thornbury District Centre, both of which have a market share of 2%. Local Centres account for a total of some 8% of shopping trips, with other out-of-centre destinations accounting for 4% of shopping trips.

6.50 Across the Study Area, 28% of shopping trips are directed to destinations outside of the District. These are principally directed towards destinations in Leeds which has an overall market share of 15%, although Calderdale is also important with a 9% market share. Leakage is particularly high in Zone 9 (82%), with trips mainly directed to facilities in Halifax Town Centre (75%).

6.51 Internet spending accounts for the remaining 3% of shopping trips by residents of the Study Area. Interestingly no spending whatsoever is conducted online for chemist goods by residents in Zone 5, although all other zones record at least some online spending.

Figure 6.5: Market Penetration (%) of Non-Bulky Goods Shopping at Facilities in Bradford District





6.52 We have combined the results of clothing and footwear, small household goods, Books, CD's DVD's; recreation and chemist patterns to form the non-bulky goods market shares for the District. Figure 6.5 overleaf shows the retention of non-bulky goods trips within Bradford District. The District's non-bulky catchment comprises mainly the central survey zones around Bradford, Shipley and Keighley.

### **Bulky Goods Shopping**

6.53 Similarly to non-bulky goods, bulky goods can be broken down into a number of distinct sub-sectors. These are: electrical items; DIY goods; and furniture, carpets and floor coverings. Each of these sub-sectors will now be examined in turn to ascertain how residents shop for such goods across the Study Area.

#### *Electrical Goods*

6.54 Facilities within Bradford District retain approximately 61% of shopping trips that are made by residents of the Study Area for the purchase of such goods. 25% of shopping trips are direct towards destinations that are outside of the District, and the remaining 14% are conducted via the internet.

6.55 In terms of the District itself, Bradford City Centre (excluding Forster Square Retail Park) accounts for the largest proportion of shopping trips with a market share of 25% overall. Bradford City Centre draws from all the Survey Zones, although it records the highest proportion of shopping trips in Zone 14 (63%). Keighley attains a market share across the Study Area as a whole of 12%, which compares to 11% attracted to Forster Square Retail Park, 2% directed towards Shipley, 1% towards Ilkley and less than 1% towards Bingley. Forster Square Retail Park draws from all the survey zones except Zone 9, although it is most significant in Zone 15 (30%) and Zone 7 (25%). Keighley draws predominately from Zone 5 (72%) and Zone 1 (68%), with Shipley drawing most of its trade from Zone 16 (15%) and 17 (14%) and Ilkley being important in Zone 3 (19%).

6.56 District Centres in Bradford District account for 6% of electrical goods shopping trips. Of the District Centres, Girdlington is the most important attracting 3% of shopping trips, with Great Horton attracting a further 2% of trips. Out-of-centre destinations in the District account for a further 3% of electrical goods shopping trips, with the most significant destination being Keighley Retail Park (2%).

6.57 In terms of leakage, destinations in Leeds authority area attract 12% of electrical shopping trips with Leeds City Centre (5%) and Guiseley (3%) being key facilities. The Leeds authority area draws mainly from Zone 17 and Zone 18. Calderdale authority area accounts for 7% of

shopping trips overall, with Halifax Town Centre itself attracting 5% of shopping trips. However, in Zone 9 Calderdale is dominant attracting 74% of all trips. Kirklees attracts 5% of electrical goods shopping trips, with Birstall Shopping Park (3%) an important destination.

- 6.58 Internet spending is fairly high in all of the survey zones, although Zone 18 records the highest level of internet purchases with 22% of all electrical purchases in this zone conducted over the internet.

#### *DIY Goods*

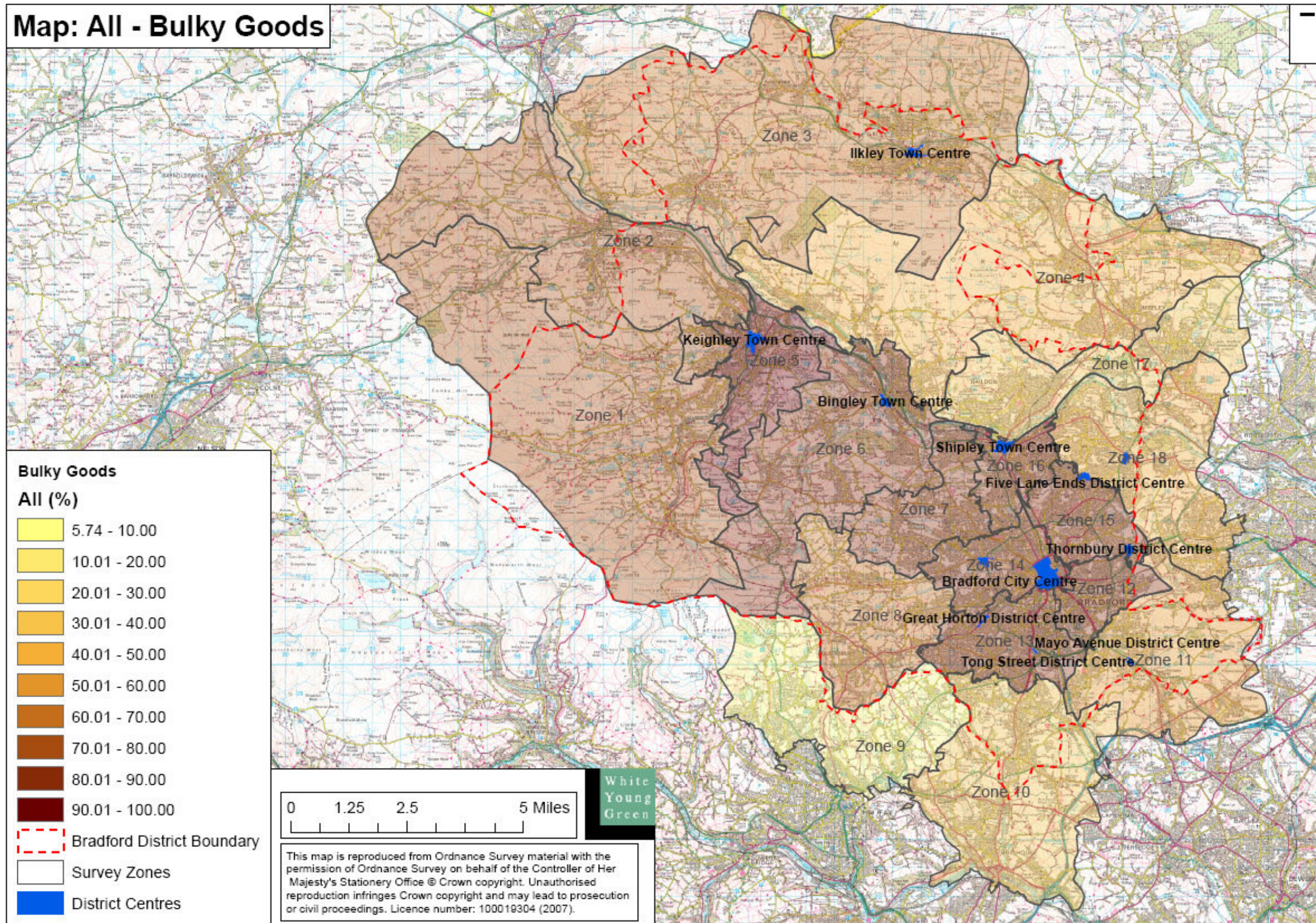
- 6.59 The retention rate of DIY shopping trips by residents of the Study Area is high, with a total of 73% of trips directed towards destinations within the District. As would be expected, the single most popular destination for DIY shopping trips are large-format DIY stores, namely B & Q, Euroway Trading Estate, Bradford (15%), B & Q, Alston Road, Keighley (13%) and B & Q, Thornbury (10%). Bradford City Centre remains an important destination however, with an overall market share of 10%. Keighley attracts 7% of shopping trips, with Ilkley attracting 2% and Shipley attracting 1%.
- 6.60 District Centres are also important destinations for DIY good shopping, attracting 16% of total DIY shopping trips. Key attractors are Thornbury, which contains a B & Q and has a market share of 10%, Greengates, which contains a Homebase store and has a market share of 3% and Five Lane Ends with a market share of 2%. Local Centres attract a little under 3% of all DIY shopping trips.
- 6.61 Leakage accounts for 26% of DIY shopping trips in the Study Area, with less than 2% of purchased conducted online. Key facilities outside of the District are identified to be Focus, Guiseley (6%) and B & Q, Pellion Lane, Halifax (5%). Clearly, the survey results show that out-of-centre destinations are favoured over town centres for the purchase of DIY goods.

#### *Furniture Goods*

- 6.62 60% of shopping trips for the purchase of furniture goods are directed towards destinations in Bradford District. 37% of trips are directed towards destinations that lie outside of the District, and 4% is undertaken online.
- 6.63 Within the District, Town Centres are the preferred location for furniture goods shopping trips attracting 46% of trips. Bradford City Centre (excluding Forster Square Retail Park) attracts 26% of trips, followed by Keighley (12%), Shipley (3%), Bingley (1%) and Ilkley (1%). In all cases the zones that are nearest to each of the town centres attract the highest proportion of shopping trips by residents of those zones.

- 6.64 District Centres account for a total of 7% of shopping trips. This includes Five Lane Ends (3%), Thornbury (2%), Great Horton (1%), Greengates, Girlington and Tong Street (all of which are below 1%). Local Centres account for 3% of furniture goods shopping trips with other out-of-centre destinations accounting for an additional 3% of trips.
- 6.65 Outside of the District, it is Leeds authority area that attracts the greatest proportion of shopping trips with a 16% market share. Leeds City Centre is the most significant location with a 7% market share across all the survey zones, although it draws mainly from Zone 18 (21%) and Zone 17 (11%). Facilities in Kirklees attract 9% of shopping trips for furniture goods with Birstall Shopping Park being particularly important with a 5% market share. This destination draws from all 18 Survey Zones. Calderdale authority area attains a market share of 8%, with Halifax Town Centre accounting for the majority of this with a 6% market share. This is mainly drawn from Zone 8 within which it has a market share of 56%.
- 6.66 We have brought together the three main categories of bulky goods, to explore the total bulky goods market shares for the district. Figure 6.6 overleaf shows that the Zones 5, 6, 7, 12, 13, 14, and 15 has the highest retention of bulky goods expenditure.

Figure 6.6: Market Penetration (%) of Bulky Goods Shopping at Facilities in Bradford District



### **Linked Trips**

- 6.67 The Household Survey also asked specific questions relating to whether linked trips were made between journeys to main food shopping destinations, and between their main food shopping destination and other centres/facilities for any other activity.
- 6.68 The Household Survey identified that when travelling to their main food shopping destination, 81% of residents within the Study Area did not combine this trip with any other activity. However, 10% of residents indicated that they combined their journey to their main food shopping destination with travelling to or from work.
- 6.69 In terms of whether respondents linked their main food shopping with any other activity once they had arrived at their destination, 77% stated that they did not. 8% of respondents stated that they combined main food shopping with non-food shopping. A further 5% of respondents linked their main food shopping trip with a leisure activity, and 5% linked it with visiting services such as banks and other financial institutions.
- 6.70 Of those respondents who link their main food shopping with non-food shopping only 2% indicated that they did this at their main food shopping destination. Consequently, the most popular destination to undertake their main food shopping as part of a linked trip was Bradford City Centre (27%). Keighley Town Centre was identified to be the second most popular destination (20%), primarily for shoppers within from Zone 5 (92%) and Zone 1 (80%). There is less evidence of linked trips between respondents' main food shopping destination and other town centres in the district, although Ilkley Town Centre attracted some 7% of those respondents who undertook non-food shopping at the same time as their main food shop.
- 6.71 In terms of clothing and footwear shopping trips, 66% of respondents indicated that they did not combine this activity with anything else. However, 10% of respondents stated that they conducted non-food shopping at the same time as clothing and footwear shopping, whilst 9% indicated that they combined it with a leisure activity.

### **Customer Preferences**

- 6.72 The Household Survey also sought to identify why respondents chose not to shop in Bradford City Centre for clothing and footwear goods. This indicated that the main reason residents of the Study Area chose to shop at other destinations over Bradford City Centre was because they were nearer to home, with 29% of residents recording this answer. A further 16% of residents who did not shop in Bradford City Centre for their clothing and footwear goods did so due to the choice of non-food goods available (16%), with other popular responses

including choice of shops selling non-food goods (13%), shopping environment (9%) and car parking provision (9%).

- 6.73 It is significant to note that within the zones that are closest to Bradford City Centre (Zone 11, Zone 12, Zone 13 and Zone 14) the most frequently cited reason for not visiting the City Centre is due to either the choice of non food goods available or the choice of shops selling non food goods. This is also true of Zone 8. However, in all other zones the most frequently recorded answer given for why respondents had not visited Bradford City Centre for clothing and footwear goods is due to the distance from home.

### **Internet Shopping**

- 6.74 The Household Survey (excluding 'varies/no pattern responses') identified that for main food purchases, approximately 2% of respondents within the Study Area undertook such shopping via the internet. Of those that did use the internet, the greatest proportion purchased goods from Tesco (49%) followed by ASDA (21%) and Sainsburys (12%).
- 6.75 In terms of clothing and footwear goods, the Household Survey identified that a little under 5% of respondents within the Study Area purchased goods via the internet. This compares to 7% for recreational goods, 6% for small household goods, 3% for chemist goods and a significant 22% for books, CDs and DVDs. Indeed for books, CDs and DVDs the market share accounted for by the internet is greater than that recorded for all other destinations except for Bradford City Centre (25%).
- 6.76 In terms of furniture goods, the Household Survey identified that 4% of respondents used the internet/home delivery for their last purchase, which compares to less than 1% for DIY goods. In contrast, some 14% of respondents stated that they last purchased electrical goods via the internet.
- 6.77 Furthermore, the Household Survey identified that when asked if people used electronic home shopping (internet or TV Shopping), 40% of respondents within the Study Area stated that their household did. Of those respondents who did purchase goods or services via electronic home shopping, CDs, music and videos was the most popular purchase, with 41% of respondents purchasing these goods. Other popular purchases include Books (34%), Clothes (28%) and small electrical items (22%).

### **Summary**

- 6.78 Based on the Household Survey undertaken, it is possible to identify the following key findings:

*Food Shopping*

- 6.79 The principal 'main food' shopping destinations in the District in terms of the proportion of shopping trips that they attract are identified by the Household Survey to be: Morrisons, Worth Way, Keighley (9%); Morrisons, Mayo Avenue, Bradford (8%); Morrisons, Young Street, Bradford (8%); Morrisons, Enterprise 5 Retail Park (7%); ASDA, Manor Lane, Shipley (6%); and Morrisons, Thornbury (6%). Collectively, these six stores account for some 43% of main food shopping trips undertaken within the Study Area, and represent 59% of all main food shopping trips retained by facilities in the District. Overall, convenience goods facilities in Bradford District 72% of main food shopping trips undertaken by residents within the Study Area. With the District, District Centres account for the largest proportion of main food shopping trips (35%) compared to Town Centres (25%), Local Centres (4%) and out-of-centre destinations (8%).
- 6.80 The Household Survey identified that 'top-up' convenience shopping is more localised. Within the Study Area, Town Centres and District Centres attract a lesser proportion of 'top-up' shopping trips (21% and 18%) compared to main food shopping trips (25% and 18%). However, the proportion of 'top-up' shopping trips directed towards Local Centres (21%) and out-of-centre destinations (16%) is significantly higher than their market share for main food shopping trips (21% and 8% respectively). As a whole, Bradford District retains approximately 77% of top-up shopping trips undertaken by residents of the Study Area.
- 6.81 The patterns of convenience good shopping in the Study Area recorded by the Household Survey are as follows:

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	<u>Main</u>	<u>Top-up</u>
<b>TOWN CENTRES</b>		
<b>Bradford</b>	<b>2.8%</b>	<b>2.9%</b>
<b>Bingley</b>	<b>0.6%</b>	<b>2.2%</b>
<b>Ilkley</b>	<b>3.1%</b>	<b>2.9%</b>
<b>Keighley</b>	<b>13.0%</b>	<b>7.8%</b>
<i>Morrisons, Worth Way</i>	<i>8.6%</i>	<i>3.2%</i>
<b>Shipley</b>	<b>6.0%</b>	<b>5.3%</b>
<i>ASDA, Manor Lane</i>	<i>5.9%</i>	<i>4.9%</i>
<b>DISTRICT CENTRES</b>		
<b>Five Lane Ends</b>	<b>6.6%</b>	<b>3.2%</b>
<i>Morrisons, Enterprise 5 Retail Park</i>	<i>6.6%</i>	<i>3.2%</i>
<b>Girlington</b>	<b>8.1%</b>	<b>2.7%</b>

<i>Morrisons. Young Street</i>	8.0%	2.4%
<b>Great Horton</b>	<b>4.4%</b>	<b>4.6%</b>
<b>Greengates</b>	<b>2.2%</b>	<b>2.4%</b>
<b>Mayo Avenue</b>	<b>8.2%</b>	<b>2.9%</b>
<i>Morrisons. Mayo Avenue</i>	8.2%	2.9%
<b>Thornbury</b>	<b>5.6%</b>	<b>2.3%</b>
<i>Morrisons, Thornbury</i>	5.5%	1.8%
<b>Tong Street</b>	<b>0.3%</b>	<b>0.2%</b>
<b>LOCAL CENTRES</b>	<b>3.7%</b>	<b>21.4%</b>
<b>OUT OF CENTRE</b>	<b>7.6%</b>	<b>16.0%</b>
<b>TOTAL BRADFORD DISTRICT</b>	<b>72.1%</b>	<b>76.6%</b>
<b>OUTSIDE BRADFORD DISTRICT</b>	<b>26.4%</b>	<b>23.2%</b>
<b>(Internet/home delivery)</b>	<b>1.6%</b>	<b>0.2%</b>
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>

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6.82 Overall, approximately 28% of main food shopping trips (including internet/home delivery) and 23% of 'top-up' convenience shopping trips undertaken within the Study Area are directed to facilities outside Bradford District. These are primarily to facilities in Leeds and Calderdale. The market share achieved by facilities within Bradford District from the Study Area is relatively high with limited 'leakage'. Morrisons appears to be a key retail destination in the District, accounting for five of the top six most popular destinations for main food shopping trips

#### *Non-Food Shopping*

6.83 In terms of non-bulky comparison goods shopping, facilities in Bradford District achieve lower market shares than those identified for convenience goods shopping. Leeds City centre is a strong destination in this sector as a result of its size and geographical location, although the internet is also an important shopping destination. A similar pattern is identified for electrical and furniture goods for which leakage is higher than that recorded for convenience goods, although the proportion of shopping trips retained in the District in the DIY goods sector is comparable to that for main food shopping trips. This indicates that the District is well provided for in this sector.



6.84 The pattern for comparison shopping within the Study Area recorded by the Household Survey is identified as follows:

	<u>Clothing &amp; Footwear</u>	<u>Books, CDs, etc.</u>	<u>Household</u>	<u>Toys, Games, etc.</u>	<u>Chemist</u>	<u>Electrical</u>	<u>Furniture</u>	<u>DIY</u>
<b>TOWN CENTRES</b>	<b>47.5%</b>	<b>40.5%</b>	<b>43.2%</b>	<b>49.6%</b>	<b>49.2%</b>	<b>51.8%</b>	<b>46.1%</b>	<b>20.3%</b>
<i>Bradford<sup>1</sup></i>	35.1%	25.2%	28.0%	34.0%	26.4%	35.9%	28.7%	10.8%
<i>Bingley</i>	0.8%	0.4%	0.1%	-	2.1%	0.5%	1.3%	-
<i>Ilkley</i>	2.0%	3.3%	2.2%	1.5%	4.2%	1.3%	1.0%	1.6%
<i>Keighley</i>	7.8%	8.4%	9.7%	11.6%	12.1%	11.7%	11.8%	6.5%
<i>Shipley</i>	1.7%	3.2%	3.1%	2.5%	4.4%	2.4%	3.3%	1.4%
<b>DISTRICT CENTRES</b>	<b>2.0%</b>	<b>2.7%</b>	<b>6.8%</b>	<b>2.8%</b>	<b>7.7%</b>	<b>5.6%</b>	<b>7.5%</b>	<b>16.1%</b>
<i>Five Lane Ends</i>	0.2%	0.2%	0.6%	0.7%	0.9%	0.3%	3.3%	2.5%
<i>Girlington</i>	-	0.5%	0.9%	1.3%	1.4%	3.2%	0.3%	0.7%
<i>Great Horton<sup>2</sup></i>	0.6%	1.1%	1.9%	0.5%	2.4%	1.6%	1.2%	0.5%
<i>Greengates</i>	1.0%	-	0.9%	0.2%	0.6%	0.1%	0.6%	2.6%
<i>Mayo Avenue</i>	0.2%	0.3%	1.1%	-	0.6%	-	-	0.1%
<i>Thornbury</i>	-	0.6%	1.4%	0.2%	1.5%	0.1%	1.5%	9.8%
<i>Tong Street</i>	-	-	0.2%	-	0.3%	0.4%	0.6%	-
<b>LOCAL CENTRES</b>	<b>0.7%</b>	<b>2.2%</b>	<b>1.9%</b>	<b>0.5%</b>	<b>7.8%</b>	<b>0.3%</b>	<b>2.8%</b>	<b>2.7%</b>
<b>OUT OF CENTRE</b>	<b>1.6%</b>	<b>1.1%</b>	<b>2.5%</b>	<b>2.0%</b>	<b>3.8%</b>	<b>3.4%</b>	<b>3.4%</b>	<b>33.8%</b>
<b>TOTAL BRADFORD DISTRICT</b>	<b>51.8%</b>	<b>46.5%</b>	<b>54.4%</b>	<b>54.9%</b>	<b>68.5%</b>	<b>61.1%</b>	<b>59.8%</b>	<b>72.9%</b>
<i>Leeds City Centre</i>	14.3%	10.15	11.1%	9.3%	4.1%	5.2%	6.7%	1.9%
<i>Halifax Town Centre</i>	5.8%	4.3%	5.0%	5.5%	5.6%	5.5%	5.5%	2.3%
<i>Other Outside of District</i>	23.3%	17.3%	23.0%	24.1%	18.8%	14.8%	24.3%	21.6%
<b>TOTAL OUTSIDE DISTRICT</b>	<b>43.3%</b>	<b>31.6%</b>	<b>39.2%</b>	<b>37.8%</b>	<b>28.4%</b>	<b>25.4%</b>	<b>36.5%</b>	<b>25.7%</b>
<b>(Internet/Home Delivery</b>	<b>4.9%</b>	<b>21.9%</b>	<b>6.5%</b>	<b>7.3%</b>	<b>3.1%</b>	<b>13.5%</b>	<b>3.7%</b>	<b>1.4%</b>
<b>TOTAL</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>

<sup>1</sup>Includes Forster Square Retail Park (Phase 1 & 2)

<sup>2</sup>Includes Tesco, Great Horton

6.85 The Household Survey identifies that facilities within Bradford District retain between 47% (Books, CDs and DVDs) and 73% (DIY) of comparison goods shopping trips undertaken within the Study Area. Bradford is understandably the main destination within the District for these types of goods.

## 7 POPULATION AND EXPENDITURE

7.01 This section of the report assessing the current population and expenditure generated within Bradford District and the wider area for both convenience and comparison goods. This expenditure is applied to the identified market shares identified Section 7 to identify expenditure flows.

### Study Area Population

7.02 The population within each postal code zone has been calculated using MapInfo AnySite (2005 estimate) from 2005 to 2017. Thereafter the population has then been projected forward based on the growth between 2012 and 2017 interpolated.

7.03 The adopted Study Area is identified to contain a resident population of approximately 630,872 (2007 estimate), which is set to increase to 648,102 in 2012, to 681,809 by 2017 and to 717,396 by 2022, representing an increase of 92,465 (or 14.7%) between 2007 and 2022.

7.04 Population figures (derived from Experian) are provided for each of the eighteen survey zones. For the purposes of this study, population and expenditure has been calculated at five-year intervals in accordance with PPS6 (i.e. 2012 and 2022) this corresponds with the RSS. Table 7.1 provides a detailed breakdown of the forecast population change within each survey zone through to 2022.

**Table 7.1: Population by Survey Zone (2007 – 2022)**

Survey Zone	2007	2012	2017	2022
1	21,624	22,869	24,369	25,967
2	49,406	50,655	52,351	54,104
3	36,745	38,899	41,652	44,600
4	25,492	26,192	27,139	28,120
5	63,407	65,730	68,676	71,754
6	28,852	30,563	32,599	34,771
7	8,704	9,483	10,458	11,533
8	44,006	45,234	47,703	50,307
9	28,298	29,521	31,037	32,631
10	32,006	33,276	34,927	36,660
11	58,094	60,535	63,714	67,060
12	27,522	28,629	30,036	31,512
13	29,882	31,518	33,488	35,581
14	46,291	47,893	50,002	52,204
15	28,852	30,563	32,599	34,771
16	34,331	35,736	37,479	39,307
17	26,755	28,426	30,441	32,599
18	31,870	32,380	33,139	33,916
<b>TOTAL</b>	<b>622,137</b>	<b>648,102</b>	<b>681,809</b>	<b>717,396</b>

Source: MapInfo AnySite (2007)

## Retail Expenditure

- 7.05 In order to calculate convenience and comparison expenditure per head, WYG has utilised MapInfo AnySite data, which provide detailed information on local consumer expenditure and which takes into account the socio-economic characteristics of the local resident population. Experian is a widely accepted source of expenditure and population information and is used nationally.
- 7.06 Expenditure forecasts have been derived from MapInfo Information Brief 07/02 (September 2007). In terms of convenience goods, MapInfo identify a forecast growth rate of +1.0% per annum between 2005 and 2006 (Table 1 of 07/02) and +1.2% per annum between 2005 and 2017 (Table 2 of 07/02). For the purposes of this study these forecast growth rates have been utilised up to 2022.
- 7.07 For comparison goods, MapInfo identifies uniform forecast growth rates. The actual growth rate from 2005 to 2006 is 5.5% (Table 1 of 07/02), whilst the forecast growth rates between 2006 and 2017 (Table 2, of 07/02) is 5.3% per annum. For the purposes of this study this forecast growth rates has been utilised up to 2022.
- 7.08 Using these forecasts, it is possible to produce expenditure estimates for each survey zone in 2007, 2012, 2017 and 2022. The assessment takes into account both retail expenditure growth and population change. Tables 7.2 and 7.3 provide a summary of the estimated growth in retail expenditure per person within the Study Area.

**Table 7.2: Convenience Goods Expenditure Per Person Per Annum (2007 – 2022)**

Survey Zone	2007	2012	2017	2022
1	1,452	1,542	1,636	1,737
2	1,478	1,569	1,665	1,768
3	1,414	1,500	1,593	1,691
4	1,165	1,237	1,313	1,394
5	1,294	1,374	1,458	1,548
6	1,471	1,562	1,658	1,759
7	1,172	1,244	1,321	1,402
8	1,302	1,382	1,467	1,557
9	1,335	1,417	1,504	1,596
10	1,508	1,600	1,699	1,803
11	1,484	1,575	1,672	1,775
12	1,430	1,518	1,611	1,710
13	1,497	1,589	1,687	1,791
14	1,172	1,244	1,320	1,402
15	1,471	1,561	1,657	1,759
16	1,342	1,425	1,512	1,605
17	1,435	1,523	1,617	1,716
18	1,448	1,537	1,632	1,732

Source: MapInfo AnySite (2007) and MapInfo Information Brief 07/02

**Table 7.3: Comparison Goods Expenditure Per Person Per Annum (2007 – 2022)**

Survey Zone	2007	2012	2017	2022
1	3,050	3,949	5,112	6,618
2	3,062	3,964	5,132	6,644
3	2,872	3,718	4,813	6,231
4	2,216	2,868	3,713	4,807
5	2,527	3,272	4,236	5,484
6	3,102	4,016	5,199	6,731
7	2,168	2,806	3,633	4,704
8	2,584	3,346	4,331	5,607
9	2,679	3,468	4,490	5,813
10	3,149	4,077	5,278	6,834
11	3,103	4,018	5,202	6,734
12	2,936	3,801	4,921	6,371
13	3,171	4,105	5,315	6,880
14	2,205	2,855	3,696	4,785
15	3,102	4,016	5,199	6,731
16	2,742	3,549	4,595	5,949
17	2,997	3,879	5,022	6,502
18	2,965	3,838	4,969	6,433

Source: MapInfo AnySite (2007) and MapInfo Information Brief 07/02

- 7.09 As illustrated above, it is anticipated that expenditure per person on convenience goods will increase by approximately 20% between 2007 and 2022. This growth in convenience goods expenditure compares to growth in comparison goods expenditure per person of 117% over the same period.

### **Convenience Goods Expenditure**

- 7.10 It is estimated that in 2007 the resident population within the Study Area generates some £861.7m of convenience goods expenditure (at 2005 prices). By 2022, this expenditure is estimated to be £1,189.0m, an increase of some £327.3m (or 38%) between 2007 and 2022.

#### *Main Food and 'Top-up' Shopping*

- 7.11 As part of the Household Survey, respondents were specifically asked questions in relation to the proportion of money they spend on their main food shopping and 'top-up' shopping. Analysis of these results indicates that approximately 73% of total convenience goods expenditure is spent on main food shopping and 17% on 'top-up' shopping. Therefore, in order to analyse the survey results for both main and 'top-up' shopping trips, WYG has subdivided the total convenience expenditure for the identified Study Area using the commonly held assumption of 75/25 split.
- 7.12 By applying these expenditure estimates per person to the identified population of the defined Study Area, convenience goods expenditure on main food shopping is estimated to be approximately £646.3m in 2007. This expenditure is set to increase by 38% between 2007 and 2022 to £891.7m. With regard to 'top-up' shopping, in 2007 the resident population

within the Study Area is estimated to generate £215.4m of convenience goods expenditure, increasing to £297.2m by 2022, representing an increase of 3% (or £81.8m).

### **Comparison Goods Expenditure**

- 7.13 By 2022 the population within the Study Area is estimated to generate £4,393.4m of comparison goods expenditure, increasing from £1,754.4m in 2007. This represents an increase of more than 150% (or £2,639.0m) between 2007 and 2022.
- 7.14 As previously highlighted, for the purposes of this study comparison goods expenditure has also been divided into eight sub-categories: Electrical; Furniture; DIY ('bulky goods') and what are referred to as 'non-bulky' goods: 'Clothing and Footwear'; 'Chemist'; 'Toys, Games, Bicycles and Recreation Goods'; 'Books, CDs and DVDs' and 'Small Household Goods'. Although PPS6 stipulates that when assessing quantitative need for additional development expenditure levels should relate to the class of goods to be sold within the broad categories of 'convenience' and 'comparison' goods, 'bulky and 'non-bulky' goods have also been examined in order to provide a qualitative overview.

#### *Electrical Goods*

- 7.15 By utilising expenditure information and forecast growth rates derived from AnySite, it is estimated that within the Study Area approximately £309 per person per annum will be spent on Electrical Goods (2007 estimate). This represents 11% of all comparison goods expenditure within the identified Study Area.
- 7.16 It is estimated that by 2022 expenditure on electrical goods will increase to £671 per person within the study area, representing growth of 117% between 2007 and 2022.
- 7.17 By applying these expenditure figures to the identified population, it is estimated that the total expenditure on electrical goods will be some £481.0m by 2022 within the study area (an increase of £289.0m or 150% from 2007 estimate).

#### *DIY Goods*

- 7.18 By utilising the 2005 price estimates for what are considered to be DIY goods by WYG (based on expenditure breakdown identified by AnySite) together with the forecast growth rate, it is estimated that within the defined study area approximately £213 per person per annum will be spent on DIY goods in 2007. This represents 7.6% of all comparison goods expenditure within the Study Area. By 2022 it is estimated that the average spend on DIY goods within Study Area will be £463 per person per annum, representing a growth of 117%.

7.19 By applying these expenditure figures to the Study Area population, it is estimated that the total expenditure on DIY goods will be some £132.5m in 2007 within the Study Area, rising to £331.8m by 2022 (an increase of £199.3m between 2007 and 2022).

#### *Furniture Goods*

7.20 It is estimated that within the defined Study Area, approximately £288 per person per annum will be spent on furniture goods (as identified by AnySite) in 2007. This represents 10.2% of all comparison goods expenditure within the defined Study Area. This expenditure is anticipated to increase to £626 per person per annum by 2022, representing growth of 117% between 2007 and 2022.

7.21 By applying these expenditure figures to the identified population, it is estimated that the Study Area will generate expenditure on Furniture goods totalling some £179.4m in 2007. Using the identified forecasts derived from AnySite (5.3% per annum), the level of expenditure for Furniture goods is anticipated to increase to £449.3m by 2022 (an increase of £269.9m or 150% between 2007 and 2022).

#### *Clothing and Footwear Goods*

7.22 Within the defined Study Area it is estimated that approximately £705.9 per person will be spent on clothing and footwear goods (2007 estimate), which represents 25% of all comparison goods expenditure generated by residents within the Study Area. This expenditure is anticipated to increase to £1,532.5 per person per annum by 2022, representing growth of 117% between 2007 and 2022.

7.23 When applying expenditure figures to the identified population within the Study Area, it is estimated that the resident population within the Study Area will generate expenditure on clothing and footwear totalling some £439.2m in 2007. Using the latest forecasts identified by AnySite for comparison goods, the level of expenditure for clothing and footwear is anticipated to increase to £1,099.4m by 2022, representing an increase of £660.3m (or 150%) between 2007 and 2022.

#### *Chemist Goods*

7.24 AnySite estimate that within the defined Study Area, approximately £350 per person will be spent on chemist goods (2007 estimate) which represents 12.3% of all comparison goods expenditure generated by residents. This expenditure is estimated to increase to £751.4 per person by 2022. This represents growth of 117% between 2007 and 2022.

7.25 By applying these expenditure figures to the identified population, it is estimated that the Study Area will generate expenditure on chemist goods totalling some £215.2m in 2007. Using the identified forecasts derived from AnySite (5.3% per annum), the level of

expenditure for chemist goods is anticipated to increase to £539.0m by 2022 (an increase of £323.8m or 150% between 2007 and 2022).

#### *Recreation Goods*

- 7.26 It is estimated that within the defined Study Area, approximately £491.1 per person per annum will be spent on recreation goods (as identified by AnySite) in 2007. Recreation goods are considered to include toys, games bicycles and recreation goods. This represents 17.4% of all comparison goods expenditure within the defined Study Area. This expenditure is anticipated to increase to £1,066 per person per annum by 2022, representing growth of 117% between 2007 and 2022.
- 7.27 By applying these expenditure figures to the identified population, it is estimated that the Study Area will generate expenditure on recreation goods totalling some £305.6m in 2007. Using the identified forecasts derived from AnySite (5.3% per annum), the level of expenditure for recreation goods is anticipated to increase to £765.2m by 2022 (an increase of £459.6m or 150% between 2007 and 2022).

#### *Books, CDs, and DVDs Goods*

- 7.28 Within the defined Study Area it is estimated that approximately £163 per person will be spent on books, CDs, and DVDs goods (2007 estimate), which represents 5.8% of all comparison goods expenditure generated by residents within the Study Area. This expenditure is anticipated to increase to £354 per person per annum by 2022, representing growth of 117% between 2007 and 2022.
- 7.29 When applying expenditure figures to the identified population within the Study Area, it is estimated that the resident population within the Study Area will generate expenditure on books, CD's and DVD's totalling some £101.5m in 2007. Using the latest forecasts identified by AnySite for comparison goods, the level of expenditure for books, CD's, DVD's is anticipated to increase to £254.3m by 2022, representing an increase of £152.7m (or 150%) between 2007 and 2022.

#### *Small Household Comparison Goods*

- 7.30 In order to estimate the level of expenditure spent on other comparison goods, such as jewellery, watches, etc. for the purposes of this study, the expenditure for the other identified categories (electrical, furniture, DIY and clothing and footwear goods, Books, CDs, DVDs, chemist, recreation) from the AnySite database estimates has been deducted from the total comparison goods expenditure.
- 7.31 Therefore, in respect of these goods, it is estimated that in 2007 approximately £304 per person per annum will be spent on other comparison goods not previously highlighted within



the defined Study Area, which represents 10.8% of all comparison goods expenditure. This is anticipated to increase to £660 per person per annum by 2022, equating to an increase of 117% between 2007 and 2022.

- 7.32 In 2007 the resident population within the defined Study Area is estimated to generate approximately £189.0m on other comparison goods. This level of expenditure is anticipated to increase to £473.3m by 2022, representing an increase of £284.3m (or 150%) between 2007 and 2022.

### **Summary**

- 7.33 With uniform rates of growth forecast prescribed by MapInfo (07/02), in each of the 'bulky' and non-bulky goods categories it is estimated that by 2022, the total proportion of spend on 'bulky' type goods will remain relatively unchanged up to 2022. Table 7.4 provides a breakdown of different comparison goods expenditure per capita per annum within the defined catchment by type of goods.

**Table 7.4: Breakdown of Comparison Goods Expenditure Per Person within the Study Area**

Year	Furniture & Carpets		DIY & Hardware		Electrical Goods		Clothing & Footwear		Household Goods		Books Cds DVDs		Recreation		Chemist		Total Comparison Goods	
	£	%	£	%	£	%	£	%	£	%	£	%	£	%	£	%	£	%
2007	288	10	213	8	309	11	706	25	304	11	163	6	491	17	346	12	2,820	100
2012	374	10	276	8	400	11	914	25	393	11	211	6	636	17	448	12	3,652	100
2017	484	10	357	8	518	11	1,184	25	509	11	274	6	824	17	580	12	4,729	100
2022	626	10	463	8	671	11	1,533	25	660	11	354	6	1,067	17	751	12	6,124	100

Source: MapInfo (Any Site) 2007

**Table 7.5: Comparison of Retail Expenditure in 'Bulky' and Non Bulky Goods (2007 - 2022)**

Year	Bulky Goods (£m)				Non Bulky Goods (£m)				Total Comparison Goods (£m)
	Furniture	DIY	Electrical	Clothing	H'hold	Books, Cds, DVD's	Recreation	Chemist	
2007	179.4	132.5	192.1	439.2	189.0	101.5	305.6	215.2	
Sub-Total	<b>504.0</b>				<b>1,250.4</b>				<b>1,754.4</b>
2012	242.1	178.8	259.1	592.4	254.9	137.0	412.2	290.4	
Sub-Total	<b>680.0</b>				<b>1,687.0</b>				<b>2,367.0</b>
2017	329.8	243.5	353.0	807.0	347.3	186.6	561.6	395.6	
Sub-Total	<b>926.4</b>				<b>2,298.1</b>				<b>3,224.5</b>
2022	449.4	331.8	481.0	1,099.4	473.3	254.3	765.2	539.0	
Sub-Total	<b>1,262.3</b>				<b>3,131.2</b>				<b>4,393.4</b>

Source: WYG (2007)

- 7.34 Table 7.5 above indicates that collectively 'Bulky' Goods expenditure within the Study Area is estimated to increase by 150% (or £758.3m) from 2007 to 2022. In addition, expenditure on non-bulky (clothing and footwear, Books, Cd's, DVD's, small household etc) goods within the study area will increase by over 150% by 2022 (from £1,250.4m to £3,131.2m), the actual

proportion of total non bulky goods expenditure within the catchment is estimated remain constant at 71% of the total spend on total comparison goods through to 2022.

### Bradford's District Market Share

- 7.35 Having calculated the likely levels of expenditure that are generated by the resident population living within the defined Study Area it is also important to understand what proportion of this expenditure is currently attracted to retail facilities within Bradford.
- 7.36 As previously highlighted, a critical element of the overall study has involved the completion of more than 1,996 household telephone interviews within the defined Study Area. By analysing the results from the survey it has been possible to understand the likely levels of expenditure that is captured by facilities in the District. The estimated market shares for the various expenditure categories are highlighted below **(N.B. The market shares may differ slightly from those identified in Section 6 of this study as the market shares below are based on expenditure whereas Section 6 is based on the proportion of shopping trips).**

**Table 7.6: Bradford Current Market Shares (2007)**

Zone	Market Shares by Category (%)										TOTAL <sup>^</sup>
	Convenience Goods		Comparison Goods								
	Main Food	Top-up Food	Furniture	DIY	Electrical	Clothing & Footwear	H'hold	Books, Cds, DVD's	Recreation	Chemist	
Bradford City Centre	2.4	2.9	28.9	9.4	32.5	31.9	25.6	24.3	28.7	23.5	19.1
Bingley Town Centre	4.2	4.3	1.1	-	0.5	0.6	0.2	0.4		1.7	0.7
Ilkley Town Centre	3.8	3.5	1.2	1.7	1.4	2.3	2.3	3.6	1.8	4.6	2.8
Keighley Town Centre	21.3	13.3	16.6	10.0	16.5	12.4	14.2	12.6	17.2	18.8	16.4
Shipley Town Centre	5.5	5.3	2.9	1.4	2.3	1.7	3.3	3.3	2.5	4.0	3.5
District Centres	28.5	15.1	6.2	15.1	4.7	1.1	5.7	3.1	2.4	6.6	11.5
Local Centres	3.0	18.9	3.1	2.4	0.3	0.7	1.7	1.6	0.4	7.4	3.6
Out-of-Centre	8.1	17.2	3.6	36.4	4.4	1.6	2.6	1.3	2.3	4.4	7.0
<b>District Sub-Total</b>	<b>73.3</b>	<b>78.2</b>	<b>63.7</b>	<b>76.3</b>	<b>62.5</b>	<b>52.8</b>	<b>55.7</b>	<b>50.2</b>	<b>55.4</b>	<b>71.0</b>	<b>64.5</b>
<b>Leakage</b>	<b>26.7</b>	<b>21.8</b>	<b>36.3</b>	<b>23.7</b>	<b>37.5</b>	<b>47.2</b>	<b>44.3</b>	<b>49.8</b>	<b>44.6</b>	<b>29.0</b>	<b>35.5</b>

Source: Bradford District Household Shopping Survey (2007)

<sup>^</sup> Based on cumulative market share of all categories (food and non-food)

- 7.37 Table 7.6 indicates that destinations within Bradford retain a total of 73.3% of main food shopping expenditure generated by residents within the study area. In terms of 'top-up' convenience shopping, existing facilities within Bradford retain over three-quarters (78.2%) of expenditure generated in the Study Area. This equates to £473.5m of main food expenditure and £168.4m of 'top-up' expenditure generated in the Study Area directed to destinations in the District. Accordingly, facilities within the District retain £641.8m of food shopping

expenditure generated in the Study Area. Overall, facilities in the District retain approximately 74.5% of all convenience goods expenditure generated in the Study Area (£861.7m).

Understandably, the level of retention differs within different zones. The Survey Zone (13) which covers area to the south of Bradford City Centre retains 98% of convenience goods expenditure generated in the zone, compared to only 16% within the Survey Zone 9, which covers the south western area of the District and includes the settlements of Bradshaw and Northowram.

- 7.38 In terms of individual foodstores within the District, the Wm Morrisons store in Keighley is the most popular store, achieving a convenience goods turnover of £106.6m. The second and third most popular stores are the Wm Morrisons at Young Street in Girdlington (£45.8m) and the ASDA in Shipley (£44.7m). Other important destinations with turnovers in excess of £40m include the ASDA at Rooley Lane; Morrisons at Mayo Avenue; Sainsburys in Keighley and the Morrisons in Thornbury.
- 7.39 Popular stores outside the District include the WM Morrisons at Otley Road in Guiseley (Leeds City Council area), which is identified to achieve a turnover from residents within the defined Study Area of almost £30m, and the ASDA at the Owlcotes Centre in New Pudsey attracting £25m.
- 7.40 With regard to comparison goods shopping, the greatest level of retention achieved by existing facilities in Bradford is DIY and Hardware goods, where existing facilities achieve a market share of 76.3% within the Study Area, which equates to £101.2m of expenditure. Collectively, the identified 'bulky goods' sector is identified to achieve a market share of 66.6% (or £335.6m), reflecting the high level of retail warehousing in the District. Again, the market shares within each zone differ with the highest level of retention in the Zone 5 where more than 90% of 'bulky goods' expenditure generated by residents within this zone is retained by facilities in the District. Other high retaining Zones include Zones 14 and 15, with 87% and 86% respectively. The lowest levels of 'bulky goods' retention is identified to be in the Zone 9, with only 5.7% of 'bulky goods' expenditure in this zone being retained by facilities in the District.
- 7.41 In respect of non-bulky comparison goods expenditure, existing facilities retain 56.8% (or £710.3m) of expenditure generated in the Study Area, which is lower than the market share achieved for 'bulky goods' (66.6%). Within the broad category of non-bulky goods, facilities in the District are identified to retain 71.0% of expenditure generated in the chemist goods sector within the Study Area, compared to only 50.2% for books, CD's, DVD's etc, reflecting residents' desire to buy such goods over the internet. The results identified that facilities in the District retained 52.8% of clothing and footwear goods expenditure within the Study Area and 55.7% for small household goods.

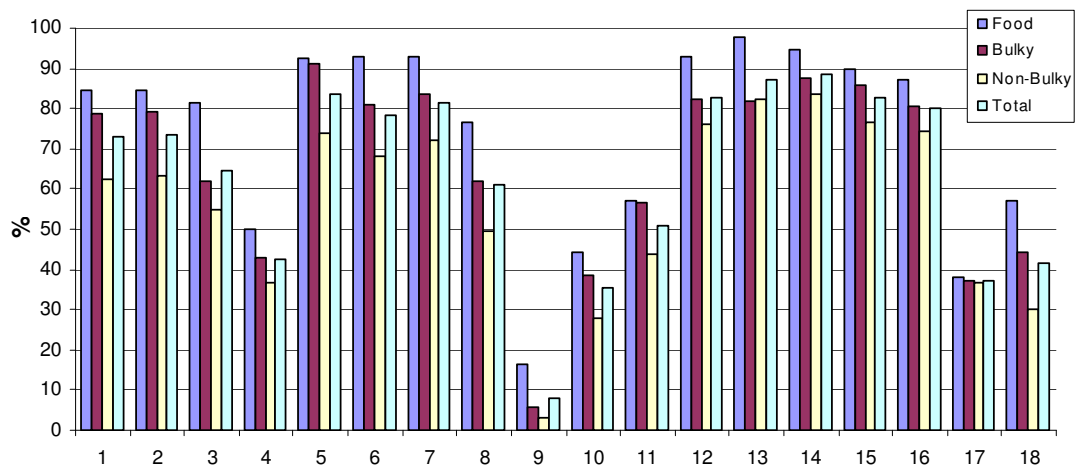
7.42 The highest level of retention of facilities within the District for Clothing and Footwear is identified to be within the Zones 12 to 15 where between 73% and 84% of expenditure generated is retained by facilities in the District. However, in terms of Small Household Goods, the highest market shares were identified within the Zones 13 to 16 at 77% and 83%. The lowest retention level achieved by facilities in the District is within Zone 9 (2%).

7.43 In terms of all comparison good expenditure in the Study Area, existing facilities in the District retain 59.6% of comparison goods expenditure. This equates to £1,046m of expenditure.

7.44 Overall, facilities in the District retain 65.5% of all expenditure generated in the Study Area (both convenience and comparison goods). This equates to £1,687.8m of expenditure, comprising £643.3m of convenience goods expenditure and £1,046m of comparison goods expenditure.

7.45 Figure 7.1 highlights that the greatest retention levels for all expenditure categories are within the Study Area.

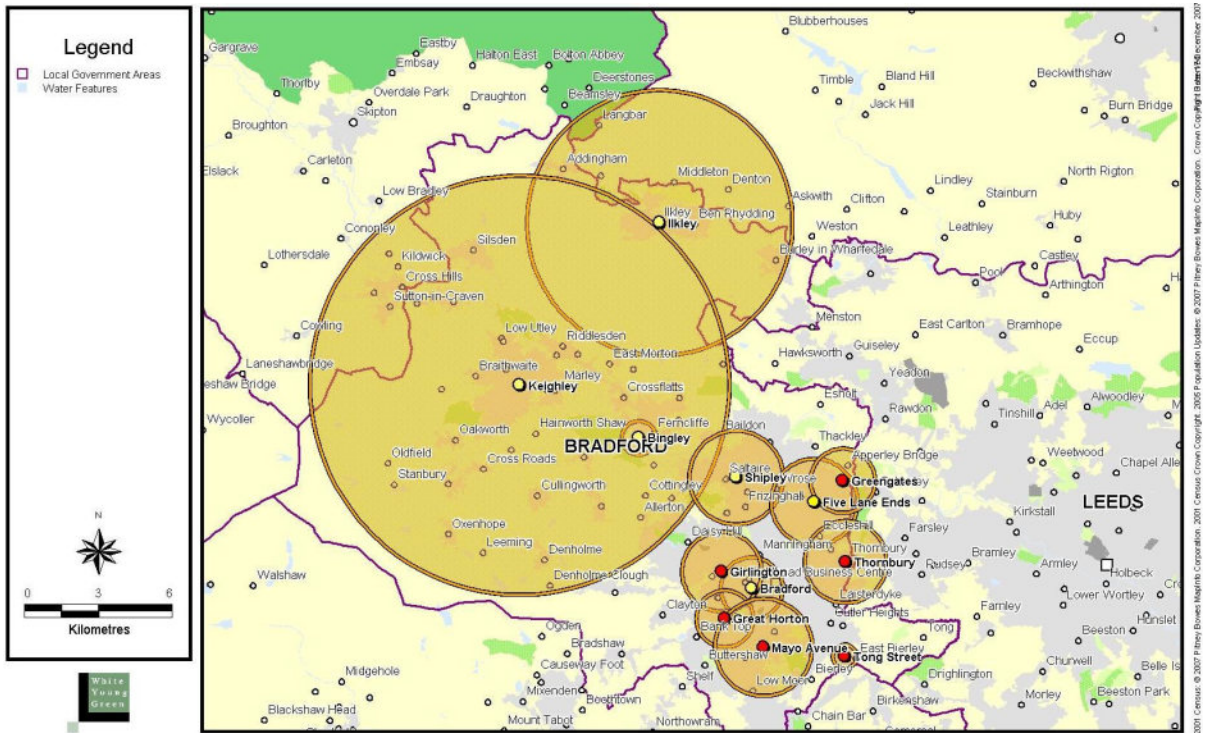
**Figure 7.1: Comparative Market Shares by Zone**



Source: Bradford Household Shopping Survey (2007)

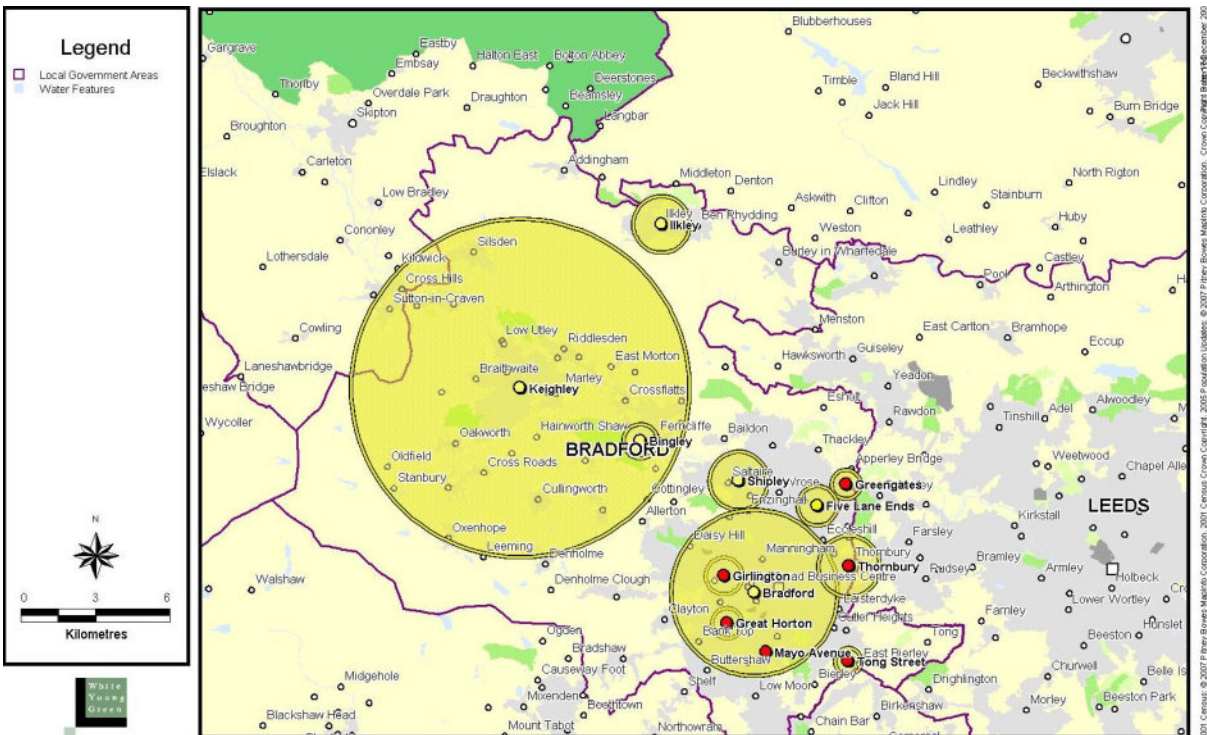
7.46 The primary catchment area for the District's convenience goods facilities is Zones 1, 2, 3, 4, 5, 6, 7, 8, 11, 12, 14, 15, 16 and 18. This is illustrated in a population gravitational graph in Figure 7.2 below.

**Figure 7.2: Primary Catchment Area for Main Food Shopping**



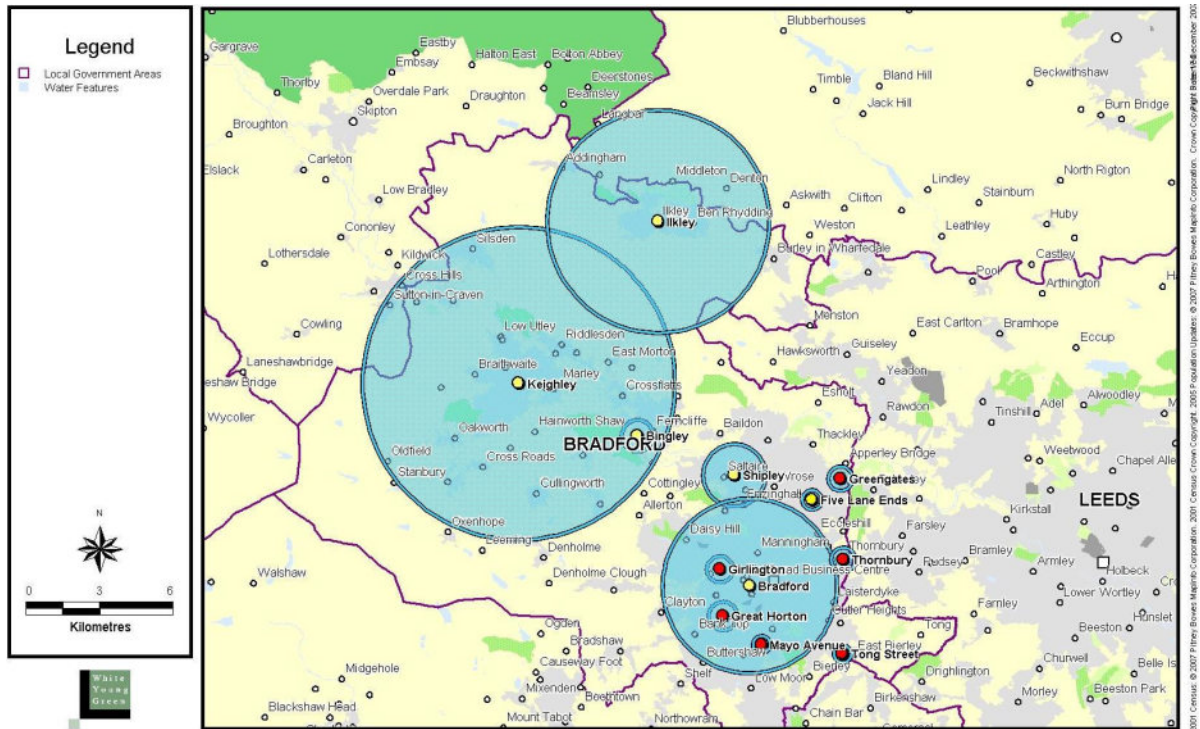
7.47 The primary catchment area for District’s bulky comparison goods facilities is Zones 1, 2, 3, 5, 6, 7, 12, 13, 14, 15 and 16. This is illustrated in a population gravitational graph Figure 7.3 below.

**Figure 7.3 Primary Catchment Area for Bulky Comparison Goods**



7.48 The primary catchment area for District's non-bulky comparison goods facilities is the same as bulky goods with Zones 1, 2, 3, 5, 6, 7, 12, 13, 14, 15 and 16. This is illustrated in a population gravitational graph Figure 7.4 below.

**Figure 7.4: Primary Catchment Area for Non-Bulky Comparison Goods**



**Forecast Growth in Expenditure Attracted to Bradford**

- 7.49 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 shares (Table 7.7).
- 7.50 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 (Table 7.7), which would be available for all new comparison retail facilities in the future. This is based on 'rolling forward' the current market shares for each category of goods (both convenience and comparison) within the Study Area. This assessment takes into account both population change and growth in retail expenditure.

**Table 7.7: Expenditure Available to Retail Facilities in Bradford**

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

Source: Bradford Household Shopping Survey (2007) and WYG (2007)

\* Based on whole Study Area (zones 1 to 18)

7.51 In addition to the above market share analysis, WYG has examined the level of inflow from the results of the On Street Surveys. WYG found that that this varied upon each centre for both types of goods (food or non-food). Table 7.8 below sets out the inflow estimates for each of the main identified town centres.

**Table 7.8: Inflow from Outside Study Area**

Centre	Food	Non-Food
Bradford City Centre	0.0	6.2
Bingley Town Centre	1.0	0.0
Ilkley Town Centre	0.0	2.0
Keighley Town Centre	1.7	2.5
Shipley Town Centre	3.2	1.1
Girlington District Centre	3.1	0.0
Great Horton District Centre	0.0	0.0
Greengates District Centre	0.0	14.3
Thornbury District Centre	10.7	0.0
Five Lane Ends District Centre	1.7	0.0
Mayo Avenue District Centre	0.0	0.0
Tong Street District Centre	1.7	0.0
<b>Total</b>	<b>1.5</b>	<b>2.5</b>

Source: NEMS & WYG (2007)

7.52 From analysis of the results we found that there was no inflow for bulky goods retailing and books, CD's, DVD's items. Therefore we have not included any inflow for these types of goods.

7.53 In order for Bradford and other town centres are to capture the significant growth in comparison goods expenditure it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the District's future market share does not decline.

7.54 However, if an excess of comparison/convenience goods expenditure manifests itself within the Study Area, this does not translate directly into a requirement for additional floorspace. It will be necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns (including e-commerce);
- The current capacity and efficiency of retail floorspace within the established centres; and
- Future changes in business productivity and current development commitments.



## 8 RETAIL CAPACITY ASSESSMENT AND THE ROLE OF EXISTING CENTRES

### Introduction

8.01 The modelling for the capacity assessment has been undertaken for two different categories of expenditure. Typically these categories reflect the different in patterns for convenience shopping and comparison shopping. This approach is advocated in PPS6, which states at paragraph 2.34 that:

**‘In assessing quantitative need for additional development when preparing its development plan documents, a local planning authority should assess the likely future demand for additional retail and leisure floorspace, having regard to a realistic assessment of:**

- Existing and forecast population levels;
- Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for the main leisure sectors; and
- Forecast improvements in productivity in the use of floorspace.’ (Our emphasis).

8.02 For the purposes of this capacity exercise WYG has primarily examined the need for new convenience and comparison floorspace. Indicative capacity assessments are provided for 2012 together with 2017 and 2022, but any assessment in the long-term should be viewed with caution. Any identified need or capacity identified beyond 2012 is not justification for new retail floorspace outside of existing centres. This could prejudice more central sites coming forward that, although not available for retail development at present, may become available between now and 2012 or after 2012.

### Capacity Formula

For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) – allowing for population change and retail growth - less Turnover (£m) - allowing for improved ‘productivity’ - equals Surplus/Deficit (£m).

**Expenditure (£m)** – the expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The formula is subject to a number of factors, which need to be considered to help provide the most accurate figure for that particular local catchment. These include:

- Growth in population;
- Growth in expenditure per person per annum; and

- Special Forms of Trading (e.g. catalogue shopping/internet).

**Turnover (£m)** – the turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Retail Rankings and Verdict Grocery Retailers – independent analysis which lists the sales density for all major retail multiples.

**Surplus/Deficit (£m)** – this represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an ‘under provision’ of retail facilities within the Study Area (which all things being equal would suggest that additional floorspace is required), whereas a deficit would represent an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 8.03 Although a surplus figure is generated in £m, it is possible to convert this figure into an indication of aggregate floorspace. The level of floorspace will vary dependent on the type of retail/goods sold. Indeed, electrical retailers such as Curry’s (which are considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as Carpetright and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

### **Bradford District**

- 8.04 Based on the current market shares of all existing facilities within the District, which includes town centres, district centres, local centres, freestanding stores etc. our analysis indicates that existing facilities in the District have a convenience goods turnover of some £641.8m in 2007. This equates to a market share of **74.5%**. In addition, £9.6m (or **1.5%**) of convenience goods expenditure is also captured from the outside the Study Area (‘inflow’).
- 8.05 WYG has estimated the ‘benchmark’ turnover of existing facilities in Bradford District based on a number of national published trading information. WYG estimate that all facilities have a benchmark convenience goods turnover of £548.9m.
- 8.06 Table 8.1 below indicates the current trading position compared against the ‘benchmark’ turnover of retail facilities in Bradford based on average sales densities, and projects this forward to 2022 at a constant market share.

**Table 8.1: Estimated 'Capacity' for Convenience Goods Facilities**

Year	Turnover - £m <sup>1^</sup>	Expenditure Available - £m <sup>2^</sup>	Surplus Expenditure - £m
2007	548.9	651.5	102.5
2012	562.8	720.5	157.7
2017	577.0	804.7	227.7
2022	591.6	898.9	307.3

Notes: <sup>1</sup> Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> Assumes constant market share at 75.4% in the Study Area and constant inflow at 1.5%  
<sup>^</sup> Assumes that 'local shops' outside the defined centres are trading in equilibrium.

8.07 Table 8.1 indicates that the 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. Consequently, there appears to be 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)<sup>3</sup>, dependent upon the end operator and type of development. Assuming that the market share of existing facilities within the District remains the same, this capacity for additional convenience goods floorspace within the District could increase to between 23,818 sq m (net) and 57,029 sq m (net) by 2022.

8.08 With regard to 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%**. In addition, the district benefits from some £16.5m (or 2.5%) derived from inflow. Table 8.2 estimates the likely expenditure that will be available for new comparison goods floorspace within Bradford by 2022 at current market share.

**Table 8.2: Estimated Available Comparison Goods Expenditure**

Year	Turnover + Increased Productivity - £m	Expenditure Available - £m	Surplus Expenditure - £m
2007	1,062	1,062	0
2012	1,145	1,433	288.8
2017	1,233	1,953	719.7
2022	1,328	2,661	1,332.3

Notes: Allows for increased 'productivity' of +1.5% per annum and assumes constant market share at 59.6% in Study Area and inflow at 2.5%.

8.09 Based on its current market share, Bradford District is identified to have a capacity for almost £288.8m of additional comparison goods expenditure that is available for new retail floorspace by 2012. By 2017 this capacity will increase to £719.7m, and by 2022 surplus comparison goods expenditure will be more than £1.34bn. However, outstanding commitments within Bradford (which may absorb some of this capacity) are considered later in this section.

<sup>3</sup> Average sales density assumed to be between £5,000/sq m and £11,972/sq m (based on the average sales density of discount retailers such as Aldi and the leading four supermarkets as identified by Verdict 2007). Allows for increases in turnover efficiency of +0.5% per annum

- 8.10 By assuming an average comparison goods sales density of £4,000/sq m and taking into account forecast increases in floorspace efficiency (at +1.5% per annum), this additional expenditure could accommodate up to 72,212 sq m (net) of comparison floorspace by 2012 and up to 266,415 sq m (net) by 2022, although this is dependent on the end operators.

### **Existing Town Centres**

- 8.11 Whilst the previous section of this Study identifies the market share of all facilities within Bradford as a whole, it is important to assess the current role of the main centres in the District.
- 8.12 The RSS (2007) identifies Bradford as a Regional Centre, whilst Keighley and Ilkley are both considered as Better Towns and are recognised as Principal Service Centres. The RSS identifies the Regional Centres of Bradford as the prime focus for new shopping development and investment. The RSS does not recognise Shipley and Bingley in the retail hierarchy. In accordance with PPS6, which advocates that new retail floorspace should be accommodated within defined town centres in the first instance, set out below is WYG's assessment of the role of these five Saved Town Centres together with the potential for additional retail floorspace within each.

### **Bradford City Centre**

#### *Overview*

- 8.13 Bradford City Centre is located 11 miles west of Leeds, 12 miles north of Huddersfield and 19 miles south-west of Harrogate. Retailing is primarily focused on a number of key pedestrianised streets, but also comprises two covered shopping malls: The Oastler Centre and the Kirkgate Centre. In addition to the City Centre's retail offer, Bradford contains a number of retail parks on the edge of the centre. Forster Square Retail Park is the largest and is located to the north-east of the city centre. This is located close to the Central Shopping Area and part of it is within the defined City Centre boundary.
- 8.14 In terms of the hierarchy of town centres set out in the Regional Spatial Strategy, Bradford is identified as the most important centre and is considered one of two Regional Centres. In floorspace terms (as identified by Experian Goad) Bradford's City Centre (central shopping area) is identified as having approximately 60,770 sq m of retail (convenience and comparison) floorspace. This places the City Centre first in the District, in terms of the amount of town centre floorspace that it contains (according to Goad). However, Bradford City Centre (as defined by Goad) excludes the existing Forster Square Retail Park. As previously highlighted, the defined City Centre as identified by the adopted UDP includes the

Retail Park Square within it, which comprises approximately 49,090 sq m (gross) of floorspace (Goad, 2006).

- 8.15 By including the Forster Square Retail Park, the total city centre floorspace in Bradford is identified to increase to more than 109,860 sq m. However, it is important to note that extant planning permission which was granted for redevelopment of the Broadway Shopping Centre for retail, residential and office use (LPA Ref: 04/01484/FUL). Consequently, if that particular planning permission is implemented, the retail floorspace within Bradford City Centre will increase significantly (by 18,300 sq. m net).

#### *Convenience Goods Shopping*

- 8.16 In order to ascertain the likely need for additional convenience goods floorspace within Bradford, it is important to understand the true nature of existing supply. As highlighted in the retail 'health check' of Bradford (contained at **Appendix 5**), the city centre contains a limited range of convenience retailers, with the proportion of floorspace and the proportion of units in this sector well below the national average.
- 8.17 Convenience retailers in the city centre include a single Wm Morrisons superstore plus a number of smaller convenience stores and the indoor market in the Oastler Centre. The Household Survey identifies that facilities within Bradford City Centre only retain **2.6%, 3.5%, 11.5% and 2.9%** of convenience goods expenditure generated in the Zones 12, 13, 14 and 15 respectively. Overall, existing facilities in Bradford City are identified to achieve a convenience goods turnover of some £21.8m.
- 8.18 However, it should be noted that there is a large Tesco store at the Peel Centre to the north of the City Centre. This store is located outside the defined city centre and is considered out-of-centre. WYG found that the store attracted £10.5m of convenience expenditure.
- 8.19 In terms of the individual foodstores within and around Bradford City Centre, the Household Survey results suggest that the Wm Morrisons store in the Oastler Centre was the most popular store attracting £18.2m of convenience goods expenditure generated within the Study Area. This stores popularity was also evident in the results of the On Street Survey. Accordingly, this store alone accounts for 84% of convenience goods expenditure directed towards Bradford City Centre (excluding Tesco) by residents within the Study Area, underlining the dominance of this store on convenience goods shopping patterns in the Bradford central area. Furthermore, the findings of the Household Survey indicate that all facilities in Bradford City Centre achieve a main food shopping catchment (3.75%) population of approximately 22,957 people within the Study Area. This is the second smallest main food catchment of the five town centres. Plans indicating the extent of Bradford's main food shopping catchment are contained at **Appendix 11**.

8.20 In terms of capacity for additional convenience goods floorspace within and close to Bradford City Centre, Table 8.3 provides a breakdown of the trading performance of existing foodstores in Bradford. The trading performance of existing foodstores is based on the survey derived turnover (based on the findings of the Household Survey) and the anticipated 'benchmark' turnover/or expected turnover (based on national published trading information from Mintel and Verdict).

**Table 8.3: Trading Performance of Current Foodstores in Bradford City Centre**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m <sup>4</sup> - £	Benchmark Turnover - £m	Survey Estimate - £m
<b>Bradford City Centre</b>						
Morrisons, Westgate	1,780	1,246	979	10,800	9.07	18.19
Marks and Spencer, Darley Street *	1,340	335	268	10,607	2.84	1.65
Local Shops and Markets	5,200	4,680	-	2,000	9.36	1.93
<b>Out of Centre</b>						
Tesco, Peel Centre	4,145	2,555	1,651	12,727	21.01	10.50
<b>TOTAL</b>	<b>17,400</b>	<b>6,261</b>	<b>4,778</b>		<b>42.3</b>	<b>32.3</b>

Notes: <sup>1</sup> - Gross Floorspace Derived from Experian Goad (2006) or IGD  
<sup>2</sup> - Gross to net split for existing foodstores based on 60/40 with exception on Marks and Spencer  
<sup>3</sup> - Net Convenience floorspace based on information provided by Verdict (2007) for Tesco, Wm Morrisons and Marks and Spencer and WYG judgement for local shops/markets  
<sup>4</sup> - Sales density derived from Verdict (2007) and Mintel Retail Rankings for national multiples and WYG assessment for local shops/markets  
\* Assumed that ¼ of Marks and Spencer store is allocated to food sales.  
At 2005 prices

8.21 By comparing the estimated total turnover generated by existing retail facilities based on anticipated 'benchmark' turnover (£42.3m), there would appear to be an oversupply of convenience goods floorspace within Bradford. Indeed, our analysis of the performance of the main convenience destination in Bradford, with the exception of the WM Morrisons unit, all the other stores are trading significantly below anticipated 'benchmark' turnover (by 24%) with a survey derived turnover of £32.3m compared to a benchmark turnover of £42m.

8.22 However, it must be noted that the results of shopper surveys should only be used with caution to estimate turnovers of individual stores (rather than their comparative market shares).

8.23 Notwithstanding the general under performance of convenience provision in the City Centre, WYG found that Wm Morrison store was over trading by 100% on benchmark. Other stores within Bradford are identified to be under-trading, including the Tesco store by £10m (or 50%) and the Marks & Spencer (food) by some £1.2m (or 42%). This is not surprising given that Bradford is WM Morrison's home town. Local shops in Bradford recorded a turnover of

£1.9m based on the Household Survey results, which compares to a benchmark turnover of £9.4m indicating that local shops in Bradford are significantly under-trading.

- 8.24 In terms of capacity for additional convenience goods floorspace within Bradford, Table 10.4 provides a breakdown of the capacity for additional convenience goods floorspace in monetary terms. Table 8.5 provides indicative floorspace requirements based on the capacity being accommodated by a modern large-format retailer (e.g. Sainsburys, ASDA, etc) and that based on a smaller format retailers (e.g. Aldi, Somerfield, etc.).

**Table 8.4: Estimated 'Capacity' for Convenience Goods Facilities**

Year	Turnover - £m <sup>1</sup>	Expenditure Available - £m <sup>2</sup>	Surplus Expenditure - £m
2007	42.28	32.27	-10.01
2012	43.34	35.69	-7.66
2017	44.44	39.86	-4.58
2022	45.56	44.52	-1.04

Notes: <sup>1</sup> - Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> - Assumes constant market share at 3.7% within the Study Area and assuming no 'inflow'

**Table 8.5: Quantitative Need for Additional Floorspace in Bradford**

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min <sup>1</sup>	Max <sup>2</sup>
2007	-10.01	-2,002	-836
2012	-7.66	-1,494	-624
2017	-4.58	-872	-364
2022	-1.04	-193	-81

Notes: - Average sales density assumed to be £11,872/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007)  
<sup>2</sup> - Average sales density assumed to be £5,000/sq m  
\* - Allows for increases in turnover efficiency of +0.5% per annum  
At 2005 Prices

- 8.25 Having regard to the identified oversupply of convenience goods expenditure, at current market share there is a no capacity for additional convenience goods floorspace within Bradford.

#### *Commitments*

- 8.26 The Council's retail floorspace monitoring report dated the 31<sup>st</sup> March 2008, states that there are no outstanding planning commitments for additional convenience goods floorspace in Bradford City Centre.
- 8.27 However, we note from further analysis of the monitoring report that there a number of convenience goods floorspace commitments located in out-of-centre location close to the City Centre. At 2008 there is 1,882 sq. m (net) of new convenience floorspace permitted located in out-of-centre locations around Bradford City Centre. WYG estimate that these could have a turnover of between £9.4m and £22.3m (depending on varying sales density). These commitments absorb the need for new convenience floorspace (based on existing market share – albeit from low market share). In addition, WYG note that there is a commitment to

demolition and rebuild the existing Tesco store on Canal Road; however, this involves no uplift in convenience goods floorspace (conditioned).

#### *Qualitative Need – Convenience Goods*

- 8.28 As previously highlighted, the Household Survey suggests that most households undertake two kinds of food shopping trips (i.e. main food shopping and 'top-up' food shopping). In this respect, Bradford City Centre contains one supermarket (comprising less than 2,500 sq m of trading floorspace in Annex A of PPS6), which is the Wm Morrisons on Westgate. This store is identified by the Household Survey as the most popular destination for main food shopping within the City Centre.
- 8.29 The Wm Morrison supermarket is supported by the foodhall within the Marks and Spencer store and a number of independent traders, mainly located in the markets within the Oastler and Kirkgate Centres. These independent and smaller convenience retailers (such as bakers, butchers, etc), sell a broad range of convenience goods. However, these stores do not offer the range of goods commonly found in larger supermarkets such as the Wm Morrisons store. In addition, the large format Tesco supermarket (defined as comprising more than 2,500 sq m of trading floorspace in Annex A of PPS6) is located nearby at the Peel Retail Park. This supermarket is located to the north of the defined City Centre.
- 8.30 Whilst facilities in Bradford City Centre (including Tesco) retain approximately less than 3.7% of convenience goods expenditure generated in the Study Area, within Zones 12, 13, 14 and 15, existing facilities retain just 8.6% of convenience goods expenditure generated. However, the majority of this expenditure (53%) is directed to the WM Morrison store.
- 8.31 PPS6 indicates that the degree to which shops are overtrading should be taken into consideration when determining the qualitative need for new convenience floorspace. The Wm Morrisons store in Bradford is overtrading and this in itself could indicate a qualitative need for additional convenience floorspace. However, this is in contrast to the other operators who appear to be under performing. Furthermore, PPS6 stipulates that Local Planning Authorities should ensure that an appropriate distribution of locations is achieved in town centres and that a range of shopping services is provided which allows genuine choice to be made by local residents. Consequently, there is a clear case to be made for an additional superstore in the City Centre which would increase the convenience goods offer for local residents (particularly for main food shopping), which currently amounts to just one Wm Morrisons store.
- 8.32 Furthermore, the overtrading of the Wm Morrisons store is likely to have an impact upon the shopping experience for local residents. On-site observations showed that the store was



congested at certain periods of the day given that it is the only real main food shopping destination within the City Centre. Furthermore, we have also found that the Tesco store is not performing well against national benchmark averages. WYG believe that this is principally due to the constrained nature of the store and the fact that a considerable amount of visitors to Bradford City Centre arrive by public transport. Given these two circumstances it is clear that people visiting Bradford City Centre will not want to visit the Tesco store due to the distance between the two. WYG believe that there is a qualitative need to improve significantly the current supermarket/superstore provision within or close to the City Centre.

8.33 From the results of the Household Survey we have found that within Zones 12, 13, 14 and 15, just 12.5% of residents travel to out-of-centre facilities within the District. The majority (63%) of people travelled to the network of District Centres within this combined four Zones. Important destinations were the Wm Morrisons in Girdlington, Thornbury, Five Lane Ends and Mayo Avenue, in addition to the Tesco Extra at Great Horton.

8.34 Therefore, it is considered that there is a qualitative need for an additional main foodstore to alleviate overtrading at the existing Wm Morrisons store and provide genuine choice for local residents within the central Bradford area. We also believe that 56% of the local residents within Zones 12, 13, 14 and 15 were visiting Wm Morrisons stores within the area. In light of the recent findings of Competition Commission (2007) Report (Groceries Market Investigation) we believe that the dominance of Wm Morrisons is restricting the main food market in the central areas of Bradford (and beyond). WYG believe that the Council should be seeking to encourage new operators either within or in close proximity to the City Centre.

#### *Comparison Goods Shopping*

8.35 As highlighted at **Appendix 5**, Bradford City Centre is the largest centre in the District for comparison goods retailers. Both the proportion of units and the proportion of floorspace within the comparison goods sector is above the national average despite the demolition of the Broadway Centre.

8.36 Analysis of the Household Survey identifies that the current (2007) level of trade passing through existing facilities in Bradford is estimated to be £477.54m; this includes £51.2m passing through the Forster Square Retail Park. This represents **27.2%** from the Study Area. From examination of the survey evidence, we found that 60% of the total comparison goods expenditure generated within the Zones 12 to 15 was retained by facilities in Bradford City Centre (including Forster Square Retail Park).

8.37 By 'rolling forward' Bradford City Centre's market share it is possible to examine the likely comparison goods floorspace required in order to maintain its current market share, namely at a level of approximately 27.2% of all comparison goods expenditure within the defined

Study Area and assuming constant inflow of 6.2% (£20.2m at 2007). It is forecast that between 2007 and 2022, an additional £748.8m will be available for comparison goods shopping within Bradford.

8.38 By assuming no change in market share or increases in Special Forms of Trading (e.g. internet sales), it is identified that if no additional comparison goods floorspace was provided within the period up to 2022, then regardless of improved 'productivity' of existing facilities, the majority of this surplus would be lost to competing centres elsewhere. Accordingly, Bradford's market share within the Study Area for all comparison goods expenditure could then fall from its current level of approximately 27.2% to 25% by 2022.

8.39 Table 8.6 below estimates the likely expenditure that will be available for new comparison goods floorspace by 2022 at current market share.

**Table 8.6: Estimated Available Comparison Goods Expenditure**

Year	Turnover + Increased Productivity - £m <sup>1</sup>	Expenditure Available - £m <sup>2</sup>	Surplus Expenditure - £m
2007	497.8	497.8	0.00
2012	536.3	671.6	135.33
2017	577.7	914.9	337.19
2022	622.3	1246.6	624.21

Notes: <sup>1</sup> - Allows for increased 'productivity' of +1.5% per annum

<sup>2</sup> - Assumes constant market share at 27.2% within the Study Area and inflow at 6.2%.

8.40 Table 8.6 indicates that by 2012 there will be some £135.3m of comparison goods expenditure available for new retail development within Bradford City Centre based on current market shares. This level of expenditure capacity is identified to increase to £337.2m by 2017 and to £642.2m by 2022. This amount of expenditure will be available for all comparison goods floorspace (both 'bulky' and 'non-bulky').

8.41 In floorspace terms (although dependent upon the end operator), by assuming an average comparison goods sales density of approximately £4,000/sq m (and allowing for increased productivity at +1.5% per annum), this equates to a potential floorspace requirement by 2012 for approximately 31,400 sq m (net) of additional comparison goods floorspace (or 44,900 sq m gross<sup>4</sup>) within Bradford City Centre. This requirement is identified to increase to 72,600 sq m (net) by 2017 and to approximately 124,800 sq m (net) by 2022 just to maintain current market share.

8.42 Although PPS6 states that quantitative need should be based on specific classes of goods to be sold (i.e. convenience and comparison) rather than specific goods such as 'bulky' goods or DIY products, it is possible from the Household Survey results to apply the market shares

<sup>4</sup> Assumes net floorspace is 70% of the gross

\* Excludes expenditure on Books, CDs and DVD.s

identified for 'bulky' and 'non-bulky' goods and identifies the capacity available for additional non-food retail floorspace within these two sectors.

- 8.43 Based on Bradford's current market share, existing 'bulky goods' facilities retain **25.1%** (or £126.4m) of 'bulky goods' expenditure generated in the Study Area. The district does not benefit from inflow for bulky goods retailing from outside the Study Area. On this basis, Bradford is identified to have a current catchment population of 156,004 people within the Study Area, reflecting the good provision within this retail sector. The extent of Bradford's bulky goods shopping catchment is contained at **Appendix 11**.
- 8.44 Based on current market shares, it is estimated that there is 'bulky goods' capacity of approximately £34.4m in the short-term (i.e. 2012) increasing to £85.6m by 2017 and to £158.5m by 2022.
- 8.45 By applying a typical sales density of leading 'bulky goods' retailers of approximately £3,000 per sq m, by 2022 this 'capacity' equates to approximately 42,267 sq m (net) or 60,381 sq m (gross) of 'bulky' comparison goods floorspace within Bradford. Again, this level of capacity is dependent upon the end-operator.
- 8.46 In terms of non-bulky goods, the Household Survey identifies that existing facilities in Bradford City Centre (including Forster Square Retail Park) achieve a market share of **27.2%** (or £351.16m) from the defined Study Area, which is marginally higher than that achieved for bulky goods (25.1%). In addition, facilities in Bradford City Centre are also identified to attract £20.9m (or 6.2%\*) of inflow from outside the Study Area. A plan indicating the extent of Bradford's non-bulky comparison goods catchment is contained at **Appendix 11** and demonstrates that Bradford draws from a wider catchment when compared to its main food and bulky goods catchment. Indeed, facilities in Bradford City Centre are identified to achieve a non-bulky comparison goods catchment population of approximately 174,721 people in 2007.
- 8.47 By applying this market share to the available expenditure, our assessment identifies capacity in the short-term of £100.1m by 2012, increasing to £251.6m by 2017 and to £465.7m by 2022. By applying an average non-bulky goods turnover of £5,000 per sq m (although this is very much dependent on the end-operator) this equates to floorspace requirements of approximately 18,740 sq m (net) in the short-term (2012) increasing to 74,500 sq m (net) in the longer-term (2022) in order for non-bulky comparison goods facilities in Bradford City Centre to maintain their current market share – assuming no change in market share or increase in e-tailing.

### *Commitments*

- 8.48 From our review of the Council's retail floorspace monitoring report, WYG believe that at the 31<sup>st</sup> March 2008, Bradford City Centre had 19,411 sq. m (net) of new comparison floorspace permitted. WYG estimate that this could have a turnover of between £58.2m and £97m depending on the average sales density applied. WYG estimate that a more conservative turnover would be circa £77.6m. WYG estimate that this represents approximately 57% of the identified (£135.3m) need by 2012.
- 8.49 Based on the above WYG conclude that 62% of the identified comparison goods (31,400 sq. m of net floorspace) need, will be met through existing City Centre comparison goods planning commitments (19,441 sq. m net) to 2012. However, this is subject to all identified planning commitments being implemented.
- 8.50 In addition, to existing central planning commitments, WYG has also reviewed out-of-centre comparison goods commitments. WYG identify that there is 11,180 sq. m (net) of floorspace permitted in out-of-centre locations around Bradford. WYG estimate that this could have (if all implemented) a turnover of between £33.5m and £55.9m depending on the average sales density applied. WYG estimate that a more conservative turnover would be circa £44.7m. Together, out-of-centre commitments and city centre planning commitments equate to 30,621 sq. m. This represents 98% (31,400 sq. m) of the floorspace capacity identified based on existing market share up to 2012. WYG estimate that the proposed turnover of these commitments (£122.3m) represents 90% of the identified expenditure capacity (£135.6m) identified up to 2012 (based on existing market share). Therefore, WYG would advise Bradford City Council to carefully monitor new comparison goods retailing over the next five years.

### *Qualitative Need – Comparison Goods*

- 8.51 Bradford provides a good range of 'non-bulky' comparison goods, reflected by the modest market share achieved by existing facilities within Bradford City Centre. The Household Survey identifies that existing facilities achieve a market share of only 27.2% of non-bulky goods expenditure generated by residents within the identified Study Area. The results found that 36.5% (or £456m) of expenditure was spent in facilities outside the District, most of which was spent at facilities in Leeds (19.4% or £243.1m), including Leeds City Centre, Pudsey and White Rose. There was also 5% (or £65m). leakage of expenditure to Halifax Town Centre and £28m to Birstall Shopping Park in Kirklees.
- 8.52 It is clear from the results that Bradford is competing directly with the larger centres of Leeds City Centre, Halifax Town Centre and White Rose Shopping Park. It is considered that there is a clear qualitative need to improve the non-bulky comparison goods offer in Bradford in order to reflect its 'sub-regional centre' status in the RSS. This may be done by enhancing

and improving current provision within the city centre in order to reduce the need for local residents to travel significant destinations to access a wide range of goods. From review of the empirical evidence, there is a significant opportunity for Bradford to improve its image as a non-bulky goods destination. We believe that the centre is perceived as offering discount comparison retailing and not providing a high quality shopping experience. If the City Centre is to compete with Leeds, Halifax and White Rose then it needs to diversify and improve its current retail offer to that which is expected in a major sub regional centre. We believe that the redevelopment of the Broadway Shopping Centre will seek to enhance Bradford's position significantly by encouraging more shoppers to the City Centre.

8.53 The retention of expenditure in the Study Area for 'bulky goods' (i.e. electrical, furniture, DIY, etc) is identified by the Household Survey to be similar to that achieved for non-bulky goods (25% compared with 27% for non-bulky goods). Even within Zones 12, 13, 14 and 15, existing facilities within Bradford District are identified to retain 85% of all the bulky goods expenditure generated by residents within these four zones. This is a particularly strong retention rate and we therefore do not believe that there is a qualitative need to improve on the current provision within Bradford significantly.

8.54 With regard to specific types of 'non-bulky goods', facilities in Bradford City Centre attract only 63.5% of expenditure generated by residents Zones 12, 13, 14 and 15. WYG found that Bradford City Centre retained £165.9m within its immediate Zones. A further £43m was spent at other facilities in the District. The results show that just £36.2m of the available non-bulky expenditure 'leaked' to facilities outside the Bradford area. The results show that 80% of the available non-bulky goods expenditure in Zones 12, 13, 14 and 15 is retained by the District's facilities. This is below the 85% for bulky goods. Given this, there appears to be limited scope to improve the retail offer in the 'non-bulky goods' sector in its immediate area and reduce the number of shopping trips to facilities outside the District. Therefore, it is evident that there is some qualitative need for additional non-bulky comparison goods floorspace.

#### *Summary*

8.55 Within the District, Bradford City Centre plays a limited convenience goods shopping role. The convenience goods sector is poorly represented albeit dominated by the constrained WM Morrisons store. Despite the clear dominance of the WM Morrisons store, the Household Survey shows that other remaining stores are under-trading. This reflects the lack of choice for main food shopping destinations within the central Bradford area, which is dominated by a number of large superstores within the existing district and local centre network. Accordingly, WYG's assessment identifies that despite being no clear quantitative need for a foodstore there is a qualitative need to improve the convenience goods provision within Bradford City Centre. This could include the introduction of various format types from local to supermarket type provision. The introduction of a new supermarket/superstore in or within close proximity

to the existing City Centre may increase the attractiveness of the centre as a main and top-up food destination.

- 8.56 The market share for comparison goods shopping in Bradford City Centre is significantly higher than that identified for convenience goods shopping. Given the significant growth anticipated in comparison goods expenditure, our assessment identifies capacity of up to 124,819 sq m (net) of additional comparison goods floorspace by 2022, just to maintain current market share. This is considered to be a significant level of floorspace, which will more than double the current level of floorspace. There is also a specific qualitative need to improve the quality and range of the comparison goods sector of the City Centre. However, it is important that any additional retail development within Bradford City Centre contributes to the vitality and viability of the existing centre.
- 8.57 We believe that in the short term (up to 2012) the proposed redevelopment of the Broadway Shopping Centre in the Bradford City Centre will meet the majority of the identified need up to 2012. However, there is still scope to improve the retail offer in Bradford further.
- 8.58 In this respect, it is important to highlight that Bradford City Centre is performing well below of its potential and is in need of regeneration. However, given the physical (topography) and built environment constraints of the city centre, it may be difficult to find any obvious site opportunities to meet this demand for new shopping floorspace.
- 8.59 Clearly, the Broadway will have a significant impact upon the retail 'offer' of Bradford City Centre together with shopping patterns within and beyond the identified Study Area. We believe that subject to the deliverability of this and the type of retailers that are secured, the development will significantly enhance and improve the retail offer which will allow Bradford to compete with other important destinations in the West Yorkshire sub region. We believe that the scheme will help claw back expenditure that is spent outside the District. However, it is important to note that this is based on current market shares and does not take into account outstanding commitments and proposals elsewhere within the District.

## **Bingley**

### *Overview*

- 8.60 Bingley is situated approximately seven miles to the north-west of Bradford. The town is situated adjacent to the A650 which connects Keighley to Bradford, via Shipley.
- 8.61 Bingley is identified as a 'Town Centre' in the adopted Saved Replacement UDP. The Central Shopping Area of Bingley is linear in nature extending along Main Street and incorporates the Myrtle Walk shopping centre and Chapel Walk. The town centre is identified by Experian

Goad to comprise approximately 5,260 sq m of convenience and comparison floorspace, making it the smallest town centre in the District in terms of floorspace.

#### *Convenience Goods Shopping*

- 8.62 As highlighted in the retail 'health check' contained at **Appendix 6**, convenience retailing is well provided for, with both the proportion of units and the proportion of floorspace reflecting the national averages. This sector is dominated by the Co-Op's foodstore situated in Myrtle Walk. Other convenience traders in the town centre are predominately smaller independent convenience outlets. The town centre contains a permanent indoor market which operates three times a week. Also there is a Tesco Express located at Crossflats less than a mile from Bingley Town Centre.
- 8.63 The Household Survey identifies that facilities within Bingley retain **1.0%** of convenience goods expenditure generated in the Study Area. This equates to a convenience goods turnover of approximately £8.2m. In Zone 6 which covers Bingley, we found that the town centre retained just 6.7% of the convenience expenditure. The Household Survey demonstrates that for main food shopping, Bingley has an identified catchment population of approximately 3,915 people. A plan indicating the extent of Bingley's main food shopping catchment is contained at **Appendix 11**. The results from the On Street Survey found that 1% of food visitors were from outside the Study Area.
- 8.64 In terms of the individual foodstores within Bingley, it is understandable that the survey results identify the Co-Op store to be the most dominant destination attracting £7.26m of convenience goods expenditure generated within the Study Area. This represents 88% of the overall retention of facilities in Bingley, underlying its dominance on convenience goods shopping patterns within the local area. Other local shops attract £1.0m from the Study Area. We also note that the Tesco Express at nearby Crossflats attracts £2.15m from the Study Area.
- 8.65 In terms of capacity for additional convenience goods floorspace within Bingley's, Table 8.7 provides a breakdown of the trading performance of existing foodstores in Bingley.

**Table 8.7: Trading Performance of Current Foodstores in Bingley**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover – £m	Survey Estimate – £m
Co-op, Myrtle Walk, Bingley	1,160	928	803	5,113	4.10	7.26
Local Shops, Bingley	800	720	720	2,000	1.44	0.96
<b>TOTAL</b>	<b>1,960</b>	<b>1,648</b>	<b>1,523</b>	<b>-</b>	<b>5.44</b>	<b>8.22</b>

Notes: <sup>1</sup> - Gross Floorspace Derived from Experian Goad (2007)  
<sup>2</sup> - Gross to net split for existing foodstores based on 80/20 with the exception of local shops which is based on a gross/net split of 90/10  
<sup>3</sup> - Net Convenience floorspace based on information provided by Verdict (2007) for Co-op and WYG judgement for local shops  
<sup>4</sup> - Sales density derived from Verdict (2007) and Mintel Retail Rankings for national multiples and WYG assessment for local shops  
 At 2005 prices

8.66 Our analysis of Bingley's market share indicates that it retains approximately £8.22m of convenience goods expenditure generated within the defined Study Area. By comparing this estimate with the anticipated 'benchmark' turnover of existing facilities (£5.44m), there would appear to be a potential under-supply of convenience retail facilities of approximately £2.76m.

8.67 It is apparent from examination of the trading performance of existing stores in the town centre that the Co-op store is overtrading, whilst local shops are under-performing. The Co-Op's store is identified to be overtrading by some £3.2m (or 77%), whereas the local shops are identified to be under-trading by a third (or £0.5m). Other convenience shops in the town centre (including the market) are identified to be trading below anticipated benchmark (£2,000 per sq. m) turnover, under-trading by 33%. However, it is important to highlight that smaller convenience retailers such as local shops may be underrepresented in Household Surveys, which tend to favour the larger stores. Therefore, the trading performance of individual stores should be considered with a 'note of caution'. Given this, our assessment of capacity is based on the town centre as a whole.

8.68 It is now important to estimate the likely need for additional convenience facilities within Bingley through to 2022 based on current market share.

**Table 8.8: Estimated Capacity for Additional Convenience Goods Facilities**

Year	Turnover - £m <sup>1</sup>	Expenditure Available - £m <sup>2</sup>	Surplus Expenditure - £m
2007	5.54	8.30	2.76
2012	5.68	9.18	3.50
2017	5.83	10.26	4.43
2022	5.98	11.46	5.48

Notes: <sup>1</sup> - Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> - Assumes constant market share at 1% in the Study Area and 1% from 'inflow'

8.69 In the short term (i.e. up to 2012) our analysis identifies that there is capacity for approximately £2.76m of additional convenience goods floorspace in Bingley based on current market shares. By 2022 this capacity increases to almost £5.5m. The current



'capacity' identified represents a need for up to 682 sq m (net) of convenience goods floorspace by 2012 increasing to almost 1,020 sq m (net) by 2022, depending upon the end operator (Table 8.9).

**Table 8.9: Quantitative Need for Additional Floorspace in Bingley**

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min <sup>1</sup>	Max <sup>2</sup>
2007	2.76	538	230
2012	3.50	682	285
2017	4.43	842	352
2022	5.48	1,017	425

Notes: - Average sales density assumed to be £11,972/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007)  
<sup>2</sup> - Average sales density assumed to be £5,000/sq m  
 \* Allows for increases in turnover efficiency of +0.5% per annum  
 At 2005 Prices

### *Commitments*

8.68 From our review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional convenience goods floorspace in Bingley Town Centre. However, WYG found that there is a small component of convenience goods floorspace (150 sq. m net) within the mixed use redevelopment of Lilycroft Mills at Dubb Street, which is considered to be out-of-centre. WYG estimate that this will have a turnover of £750k and will absorb (if implemented) 21% of the identified capacity at 2012.

### *Qualitative Need – Convenience Goods*

8.69 Bingley is identified to contain only one small supermarket (as defined by PPS6), the Co-op store in Myrtle Walk. Understandably, this store is the most popular convenience goods shopping destination in Bingley and is identified by the Household Survey to be overtrading by 77%.

8.70 This modest supermarket is supported by a number of smaller stores, including independent retailers (such as bakers, butchers, etc.) together with the frequent market.

8.71 Facilities within Bingley retain just 1% of convenience goods expenditure generated within the defined Study area. The limited retention is also found in Zone 6, where existing facilities retain just 19.4% of convenience goods expenditure generated in this zone, most of the available convenience goods expenditure is directed to the facilities in Keighley and Shipley. Only 6% of expenditure generated in Zone 6 is spent at destinations outside the District. This 'leakage' is primarily to facilities in the District. We found that £21.2m of the expenditure in Zone 6 is spent in either Keighley or Shipley.

8.72 Given this and the overtrading of The Co-op facility in Bingley, there appears to be demonstrable qualitative need to improve the convenience goods offer within Bingley based

on current shopping patterns. There is an opportunity to enhance convenience provision within Bingley which may help to reduce the overtrading of the Co-op store and reduce the level of expenditure currently being lost to facilities outside Zone 6. However, in considering any improvement in the market share within the Bingley it is important to note that many residents within Zone 6 are equally or are better positioned to access facilities either in Keighley or Shipley as they are located equidistant to either centre. Furthermore, although the Household Survey suggests that there is limited attraction to Bingley the other 17 Zones in the Study Area, and the significant regeneration proposed in Keighley (ASDA) will reduce any opportunity to increase market share in the Bingley. Given this, it is considered that there is a qualitative need to provide modest scaled convenience floorspace in Bingley in order to improve the market share and to reinforce the centre as a convenience and service destination.

*Comparison Goods Shopping*

- 8.73 As highlighted in **Appendix 6**, the comparison goods offer in Bingley is extremely limited and is not as well represented as the convenience goods sector, with both the proportion of floorspace and units significantly below the national average. The town centre is limited to key attractors such as Boots and the Co-Op. However, the centre contains a diverse range of independents together with a market.
- 8.74 The Household Survey identifies that existing facilities in Bingley achieve a comparison goods turnover (both bulky and non-bulky) of approximately £10.3m from the defined Study Area. This represents a market share of approximately **0.6%** of the total comparison goods expenditure generated in the Study Area. This is the lowest retention rate for a town centre in the district. The results of the On Street Survey found that there was no inflow from outside the study area.
- 8.75 By ‘rolling forward’ Bingley’s market share, it is possible to examine the likely level of additional comparison goods floorspace required in order to maintain its current market share. It is forecast that between 2007 and 2022, an additional £15.42m will be available for comparison goods shopping within Bingley.
- 8.76 Table 8.10 below estimates the likely expenditure that will be available for new comparison goods floorspace within Bingley by 2022 at current market share.

**Table 8.10: Estimated Available Comparison Goods Capacity**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	10.4	10.4	0.00
2012	11.3	14.1	2.84
2017	12.1	19.2	7.08
2022	13.1	26.2	13.11

Notes: <sup>1</sup> - Allows for increased ‘productivity’ of +1.5% per annum  
<sup>2</sup> - Assumes constant market share at 0.6% within the Study Area and no inflow

- 8.77 Table 8.9 indicates that in the short-term (by 2012) there will be some £2.8m of comparison goods expenditure available for new retail floorspace based on current market shares. This level of expenditure capacity is identified to increase in the longer term to £13.1m by 2022. This level of capacity will be available for all comparison goods floorspace.
- 8.78 Although dependent upon the end-operator (e.g. retail warehousing, national multiple, independent, etc) by assuming an average comparison goods sales density of approximately £4,000/sq m, this equates to a floorspace requirement for 660 sq m (net) of additional comparison goods floorspace by 2012 (or 940 sq m gross<sup>5</sup>). This requirement is identified to increase to more than 1,525 sq m (net) by 2017 and to 2,620 sq m (net) by 2022.
- 8.79 With such a limited comparison goods offer it is not necessary to explore different options for either bulky or non-bulky capacity.

#### *Commitments*

- 8.80 From review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional comparison goods floorspace in Bingley.

#### *Qualitative Need – Comparison Goods*

- 8.81 With such a limited comparison goods offer the level of comparison goods provision with the centre could be enhanced. However, given the convenience and service nature of Bingley any future enhancement of comparison floorspace would need to be appropriate for Bingley.
- 8.82 Whilst the strength of competing centres within the District (Bradford and Keighley) is acknowledged, there appears to be a qualitative need to improve and enhance the comparison goods offer of the town centre. However, it is important that any development should contribute to improving the vitality of the town centre and should reduce the need for local residents to travel to facilities elsewhere.
- 8.83 Consequently, a significant proportion of expenditure (c. 23%) is directed towards facilities outside the District from the Zone 6, most notably to facilities in Leeds. Another 64% is spent at existing facilities in Bradford District. Therefore, analysis of the findings of the Household Survey suggests that there is some scope to improve the comparison goods provision within Bingley. However, given the modest size of Bingley we would advise that it is inappropriate to expand the town centre significantly.

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<sup>5</sup> Assumes net floorspace is 70% the gross

## *Summary*

- 8.84 Bingley is identified to be an important convenience and service destination rather than a comparison goods shopping destination. The convenience goods sector is well represented although the Co-op's overtrading indicates that there is some limited scope for additional convenience goods floorspace within Bingley. However, it is important to note that this is based on current market shares and does not take into account outstanding commitments and proposals elsewhere within the District.
- 8.85 Bingley performs a negligible role as a comparison goods shopping destination (identified as the lowest performing centre in the District). Our assessment identifies capacity for up to 2,570 sq m (net) of floorspace by 2022. There is also considered to be a qualitative need identified to improve the quality and range of the comparison goods sector. Indeed, the findings of the Household Survey suggest that there is modest 'leakage' to competing centres within the District. Moreover, there is a lack of modern outlets within the centre as a whole, resulting in limited market shares being achieved for comparison shopping. Therefore, it is considered that there is a clear demonstrable 'need' for additional comparison goods floorspace within Bingley.
- 8.86 It is important that any additional comparison goods floorspace within Bingley contributes to its future vitality and viability. It is important that the Council seek to resist further out-of-centre retail development that is likely to have an adverse impact upon the vitality of Bingley Town Centre. Any new comparison goods floorspace will need to complement the convenience and service role that the centre performs.

## **Ilkley**

### *Overview*

- 8.87 Ilkley is an historic centre located on the A65 in the north of Bradford District. It is situated some 16 miles to the north-west of Leeds and 10 miles to the north of Bradford City Centre. It is also a tourist destination, with a good range of associated retail and leisure services. It is dominated by strong independent retailers which provide a unique shopping experience. The centre also benefits from two superstores (Tesco and EH Booths).

### *Convenience Goods Shopping*

- 8.88 The convenience goods sector is dominated by the Tesco supermarket on Springs Lane (2,920 sq m gross), which accounts for a third of all convenience goods floorspace within the centre. The Tesco store is complemented by the EH Booths and the Co-op in addition to a number of independent convenience stores (including good quality butchers, bakers, greengrocers and health food shops).

8.89 The Household Survey identifies that existing facilities in Ilkley achieve a convenience goods market share of **3.7%** of convenience goods expenditure generated in the Study Area. This equates to a turnover of approximately £32.1m, the majority of which (76%) is directed towards main food purchases. The existing Tesco store is identified as the tenth most popular foodstore in the District. The Household Survey identifies that convenience facilities in Ilkley have a catchment population for main food shopping of approximately 23,548 people within the Study Area. A plan indicating the limited extent of the catchment of Ilkley is contained at **Appendix 11**. The survey suggests that there is there to no inflow of convenience expenditure from outside the Study Area.

8.90 In terms of capacity for additional convenience goods floorspace within Ilkley, Table 8.11 provides a breakdown of the trading performance of existing foodstores.

**Table 8.11: Trading Performance of Current Foodstores in Ilkley**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m – £ <sup>4</sup>	Benchmark Turnover - £m	Survey Estimate - £m
Tesco, Springs Lane, Ilkley	2,920	2,044	1,320	12,727	16.81	22.39
Booths, Ilkley	2,590	1,813	1,631	9,500	15.50	4.68
Local Shops, Ilkley	2,920	2,336	2,336	2,000	4.67	3.69
Co-op Late Shops, Brook Street, Ilkley	290	261	226	5,113	1.15	1.29
<b>TOTAL</b>	<b>8,720</b>	<b>6,454</b>	<b>5,513</b>	<b>-</b>	<b>38.13</b>	<b>32.06</b>

Notes: <sup>1</sup> - Gross Floorspace derived from Goad (2007)

<sup>2</sup> - Gross to net split for local shops based on 80/10, gross to net split of Tesco and Booths based on 70/30, gross to net of Co-op 90/10

<sup>3</sup> - Net convenience floorspace for Tesco, Co-op, based on information provided by Verdict (2007) and WYG judgement for Eh Booths and local shops

<sup>4</sup> - Sales density derived from Verdict (2007) for Tesco, Co-op and on WYG assessment for local shops and EH Booths  
At 2005 prices

8.91 Our analysis of Ilkley's market share estimates that existing facilities retain approximately £32.1m of convenience goods expenditure generated within the defined Study Area. This compares to an expected 'benchmark' turnover of existing provision of £38.1m. As such our analysis would appear to suggest that there is an over-supply of convenience goods floorspace in Ilkley of more than £6m. Indeed, the Household Survey suggests that the Tesco store is overtrading by approximately 33% (or £5.6m), whilst the remaining local shops in Ilkley are identified to be under-trading, including EH Booths.

8.92 Having regard to this surplus expenditure, it is possible to estimate the likely need for additional convenience goods facilities within Ilkley through to 2022 based on current market shares.

**Table 8.12: Estimated Capacity for Additional Convenience Goods Facilities**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	38.13	32.06	-6.07
2012	39.10	35.46	-3.64
2017	40.08	39.60	-0.48
2022	41.09	44.23	3.14

Notes: <sup>1</sup> - Allows for increased turnover efficiency of +0.5% per annum

<sup>2</sup> - Assumes constant market share at 3.7% in Study Area no inflow

8.93 Despite the overtrading of the Tesco store, our analysis suggests that there is currently no capacity in Ilkley in the short to medium term for additional convenience goods floorspace based on current market shares.

8.94 In the longer term, up to 2022, there may be capacity for up to 500 sq. m of convenience goods based on existing market shares.

#### *Commitments*

8.95 From our review of the Council's retail floorspace monitoring report (2008) there are only two outstanding planning commitments. The first relates to the change of use of the former Kwik Save store for unrestricted Class A1 retail. WYG estimate that this building has a net floorspace of 895 sq. m. The unit has now (April 2008) been re-occupied by Marks and Spencer Simply Food Hall. WYG understand that the store turnover will be circa £9.5m. The second relates to (06/04410/FUL) the redevelopment of the Ilkley Service station (out-of-centre) which will provide an additional 235 sq. m of convenience floorspace and could have a turnover of up to £1.2m. In light of the current planning commitments, this further emphasises that there is no quantitative need for new convenience floorspace in Ilkley.

#### *Qualitative Need – Convenience Goods*

8.96 Ilkley benefits from two large-format superstore (Tesco and EH Booths), which dominate the convenience goods sector in the town. The Tesco is identified to be overtrading whilst the EH Booths is under trading.

8.97 Although it is notable that facilities in Ilkley draw convenience expenditure from 10 of the 18 survey zones the greatest market share is achieved from the Zone 3 where existing facilities attract 64% of convenience goods expenditure generated in this zone. However, we found that 17% of the available convenience goods expenditure in Zone 3 was being spent outside the District. This was spent at facilities in Skipton (Craven) and Guiseley (Leeds). This equates to approximately £9m leaking outside the district. In addition, the results found that £7m of convenience expenditure was spent at facilities in Keighley (Wm Morrisons and Sainsburys). WYG believe that given the proximity of these alternative destinations it is reasonable to expect some natural leakage of expenditure to competing centres due to travel to work patterns etc. WYG believe that the introduction of Marks and Spencer will help

provide further qualitative improvements to the convenience provision in the town and will help foster more competition in this sector.

8.98 In summary we believe that the current convenience provision within the town is sufficient to meet current and future residents' needs in the short to medium term. We believe that restraining any further convenience development within Ilkley will ensure that a viable and successful independent retail sector can be sustained.

*Comparison Goods Shopping*

8.99 The comparison goods retail offer in Ilkley is limited comprising less than 13,590 sq m (gross) of floorspace. Accordingly, the Household Survey identifies that existing non-food facilities in Ilkley retain only **2.3%** (or £40.4m) of total comparison goods expenditure generated in the Study. In addition facilities within Ilkley benefit from inflow from outside the Study Area which attracts £0.7m (or **2%**) of comparison goods expenditure. This results in a total comparison goods turnover of approximately £41.1m.

8.100 By rolling forward the current market share of comparison facilities in Ilkley through to 2022, there will be £51.5m available for additional comparison goods floorspace in Ilkley.

8.101 Table 8.13 estimates the likely level of expenditure that will be available for new comparison goods floorspace within Ilkley by 2022 at current market share.

**Table 8.13: Estimated Available Comparison Goods Capacity**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	41.1	41.1	0.00
2012	44.2	55.4	11.16
2017	47.7	75.5	27.82
2022	51.3	102.8	51.50

Notes: <sup>1</sup> - Allows for increased productivity; at +1.5% per annum

<sup>2</sup> - Assumes constant market share at 2.3% in Study Area and 2% for inflow

8.102 Table 8.13 indicates that in the short term (2012) there will be surplus expenditure of £11.2m of comparison goods expenditure available for additional comparison goods floorspace reflecting the limited market share achieved by facilities in Ilkley. This level of capacity is identified to increase to £27.8m by 2017 and to £51.5m by 2022.

8.103 In floorspace terms, this equates to a requirement for approximately 590 sq m (net) of additional comparison goods floorspace in the short term (2012). This requirement is identified to increase to 1,360 sq m (net) by 2017 and to more than 2,340 sq m (net) by 2022, although the level of floorspace identified is dependent upon the end operator.

8.104 With such a limited comparison goods offer it is not necessary to explore different options for either bulky or non-bulky capacity.

### *Commitments*

- 8.105 From our review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional comparison goods floorspace in Ilkley. WYG note that there are a number of change-of-use applications for the conversion of Class A1 uses to other uses. This has led to the reduction (698 sq. m net) of Class A1 floorspace. The continued and unchecked decline of Class A1 floorspace may impact upon the centre's function as a retailing destination and therefore will need to be carefully monitored.

### *Qualitative Need – Comparison Goods*

- 8.106 The limited comparison goods offer of Ilkley is reflected in the low market shares achieved by existing facilities within the comparison goods sector. This low level of retention (2.7%) underlines the primarily convenience goods shopping role of Ilkley. Whilst there may be some potential to enhance the current offer, it is unlikely that the comparison goods market share of Ilkley will significantly improve in the future given the centre's proximity to the larger centres of Skipton, Guisley and Otley. Accordingly, any expansion of the retail offer in Ilkley will be affected by the historical built environment and the limited opportunities available. The town centre benefits from tourism related visits which relate to the unique and attractive character of the centre. Therefore, any additional development/redevelopment within Ilkley should focus on enhancing existing provision through sensitive well considered initiatives. This will contribute to the sustained vitality and viability of the centre rather than creating significant new floorspace. This can be achieved through alternative mechanisms such as environmental improvements, town centre management and economic incentives.

### *Summary*

- 8.107 Ilkley serves a more limited role in the District than the larger centres of Keighley and Bradford. The centre generally serves a convenience goods shopping role with the majority of expenditure directed towards the Tesco foodstore. The centre offers special independent comparison retailing which focuses on the tourism and visitor trade attracted to the centre. Given the current overtrading of the Tesco store there appears to be limited scope for additional convenience goods provision in Ilkley in the short to medium term.
- 8.108 The comparison goods offer of Ilkley is modest reflecting the role of the centre. However, our analysis identifies capacity for up to 2,340 sq m (net) of additional comparison goods floorspace at current market share by 2022. However, given the important quality of the built environment, we consider that such identified need is to be carefully and sensitively considered in order to preserve its uniqueness which is Ilkley's key attraction.



### Keighley

- 8.109 Keighley is located in the east of Bradford District at the intersection of the A650 and A629 trunk roads. It is situated in the Aire Valley, approximately 11 miles north west of Bradford and 27 miles west of Leeds.
- 8.110 In floorspace terms, (as identified by Experian Goad) Keighley is identified as the second largest centre within the District behind Bradford City, comprising approximately 76,690 sq. m of floorspace.

### Convenience Goods Shopping

- 8.111 In order to ascertain the likely need for additional convenience goods floorspace within Keighley, it is important to understand the true nature of existing provision. As highlighted in the retail 'health check' of Keighley contained in **Appendix 6**, it is evident that that Keighley Town Centre contains a range of convenience goods retailers, including the large format WM Morrisons together with the J Sainsbury. In addition, a number of other stores including Aldi, Netto, Marks & Spencer (foodhall) Iceland and Farmfoods are located within the town. The centre also benefits from local independent retailers (including the market) within the town centre. The household survey identifies that facilities within Keighley retain 19.3% of the convenience goods expenditure generated within the Study Area, which equates to a convenience goods turnover of £166.3m.
- 8.112 In terms of the individual foodstores within Keighley, it would appear from the survey results that the Wm Morrisons store on Worth Lane is the most popular store attracting £106.6m of convenience goods expenditure generated within the Study Area. The store is the most popular food destination in the district.
- 8.113 The second most popular store in Keighley is the J Sainsbury, which attracts £40.5m of the convenience goods expenditure within the Study Area. The third most popular destinations is the local shops and markets, which together attract £5.4m of the available convenience expenditure.
- 8.114 On its own the Wm Morrisons store captures 64% of the total expenditure retained by facilities in Keighley, underlying the dominance of the stores on food shopping patterns in Keighley. The findings of the household survey indicate that all facilities in Keighley have a main food shopping catchment population of approximately 132,465 which is the highest of the District network of centres.

8.115 In terms of capacity for additional convenience goods floorspace, Table 8.14 provides a breakdown of the trading performance of existing foodstores in Keighley. The trading performance of existing foodstores is based on the survey derived turnover and the anticipated 'benchmark' turnover/or expected turnover (based on national published trading information from Mintel and Verdict).

**Table 8.14: Trading Performance of Current Foodstores in Keighley Town Centre**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m <sup>4</sup> - £	Benchmark Turnover - £m	Survey Estimate - £m
<b>Keighley Town Centre</b>						
Morrisons, Worth Way, Keighley	5,690	3,414	2,683	10,800	28.98	106.56
Sainsburys, Cavendish Street, Keighley	7,040	4,224	3,155	9,343	29.48	40.46
Aldi, Gresley Road, Keighley	1,240	868	781	4,283	3.35	4.85
Netto, Keighley	1,240	868	781	3,050	2.38	5.30
Marks and Spencer, Low Street, Keighley	352	282	282	10,607	2.99	2.02
Iceland, Gresley Road, Keighley	560	504	504	5,018	2.53	0.79
Farmfoods, Cooke Lane, Keighley	40	36	36	2,000	0.07	0.52
Local Shops, Keighley	4,510	3,608	3,608	2,000	7.22	5.78
<b>TOTAL</b>					<b>76.99</b>	<b>166.28</b>

Notes: <sup>1</sup> - Gross Floorspace Derived from Experian Goad (2006) or IGD  
<sup>2</sup> - Gross to net split for existing foodstores based on either 90/10, 80/20, 70/30 60/40 depending on retailer  
<sup>3</sup> - Net Convenience floorspace based on information provided by Verdict (2007) for Sainsburys, Wm Morrisons, Iceland and Marks and Spencer and WYG judgement for local shops/markets. Netto, Farmfoods and Aldi .  
<sup>4</sup> - Sales density derived from Verdict (2007) and Mintel Retail Rankings for national multiples and WYG assessment for local shops/markets.  
\* Assumed that ¼ of Marks and Spencer store is allocated to food sales.  
At 2005 prices

8.116 As previously highlighted, our analysis of Keighley's town centre market share shows that it retains £166.3m of convenience goods expenditure generated in the defined Study Area. By comparing this estimate with the total turnover generated by existing retail facilities based on anticipated 'benchmark' turnover (£77m), there would appear to be an under supply of convenience goods floorspace within the town. Our analysis of the performance of the leading supermarket in Keighley (Wm Morrisons) indicates that the WM Morrisons store is trading above the anticipated benchmark turnover (by 270%) trading at £106.6m compared to a benchmark turnover of £29.0m.

8.117 The results of the household survey should be used with caution when estimating the turnovers of individual stores (rather than their comparative market shares). Nevertheless, the results appear to confirm our impressions that the Wm Morrisons store in Keighley is trading exceptional well. The survey evidence suggests that the remaining stores and shops

(including Netto, Aldi and Sainsburys) are also trading above their comparable benchmark levels.

- 8.118 Having regard to the identified under supply of convenience goods expenditure, it is evident that there is a clear quantitative need for additional convenience goods floorspace at current market share. By assessing 'need' through to 2022 (Table 8.15), it is evident that at current market shares there remains an undersupply of convenience goods floorspace in Keighley.

**Table 8.15: Estimated Capacity for Additional Convenience Goods Facilities**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	76.99	169.11	92.12
2012	78.94	187.04	108.10
2017	80.93	208.89	127.96
2022	82.97	233.33	150.36

Notes: <sup>1</sup> - Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> - Assumes constant market share at 19.5% in Study Area and inflow of 1.7%

- 8.119 Table 8.16 indicates that over the period to 2012, at current market share there is a requirement between 7,759 sq. m (net) and 18,423 sq. m (net) of additional convenience goods floorspace, dependent upon the end operator and type of development. The need by 2017 will increase to between 8,881 sq. m (net) and 21,087 sq. m (net). In the longer term (i.e. 2022) the need will increase further.

**Table 8.16: Quantitative Need for Additional Floorspace in Keighley**

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min <sup>1</sup>	Max <sup>2</sup>
2007	92.12	7,759	18,423
2012	108.10	8,881	21,087
2017	127.96	10,254	24,346
2022	150.36	11,752	27,903

Notes: <sup>1</sup> - Average sales density assumed to be £11,872/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007)  
<sup>2</sup> - Average sales density assumed to be £5,000/sq m  
\* Allows for increases in turnover efficiency of +0.5% per annum  
At 2005 Prices

#### *Commitments*

- 8.120 From review of the Council's retail floorspace monitoring report (2008) there is one convenience goods outstanding (extant) planning commitments for additional convenience goods floorspace in Keighley. This relates to the proposed new Asda store located at the former Peter Black warehouse on Bradford Street. The out-of-centre proposal includes a new superstore comprising 7,470 sq. m gross floorspace. The net sales area is conditioned to 3,716 sq. m with 2,230 sq. m (net) allocated to convenience goods. WYG estimate that the proposed Asda convenience floorspace will have a turnover of circa £32.3m.

- 8.121 In addition, the monitoring report identifies two out-of-centre convenience goods commitments, which together will create 722 sq. m of new convenience floorspace. We estimate that these will have a estimated turnover of between £3.6m and £8.6m if implemented.
- 8.122 WYG estimate that the existing town and out-of-centre planning commitments will absorb between 33% and 38% of the identified capacity (£108m) at 2012. WYG would advise that this position should be monitored carefully in the future once more established and settled shopping patterns are developed once the proposed Asda store is trading.

*Qualitative Need – Convenience Goods*

- 8.123 From results of the household survey, WYG found that in Zone 2, which covers the urban area of Keighley, 73.8% of the main food expenditure is retained by facilities in Keighley; 8.1% was spent at other facilities in the District and 13.9% was spent in adjacent Craven Borough. Keighley retains a high level of main food expenditure and that this is acceptable, as there will always be natural leakage which accounts for travel to work patterns etc. In conclusion it is considered that limited convenience goods shopping trips are being made by households with Keighley to facilities outside the immediate area. The area therefore benefits from sustainable convenience shopping patterns.
- 8.124 It is evident from the results that the Wm Morrisons store dominates convenience goods shopping in both Zone 2 and the wider Study Area. Indeed, earlier we demonstrated that the store was trading significantly above it's estimated benchmark turnover. On this basis, it is considered that there appears to be a clear qualitative need to significantly improve the choice of convenience goods offer in Keighley, in order to reduce the reliance on the Wm Morrisons and to a lesser extent the J Sainsburys. WYG believe that the introduction of the proposed ASDA at Bradford Road will help to improve choice to local consumers. Once the ASDA store is developed and has established continued trading patterns (after 2 years) then we would recommend that the Council review the capacity issue again to establish whether the quantitative and qualitative needs have been addressed.

*Comparison Goods Shopping*

- 8.125 It is evident that Keighley contains a range of comparison goods retailers including multiple and independent retailers. The centre also benefits from retail warehousing (including the Airedale Centre. With such a diverse range of retailers trading within Keighley it is more difficult to estimate the likely benchmark turnover of each facility. Therefore, WYG considers the most accurate way to estimate the existing retail facilities is to analyse the market share of facilities in Keighley identified by the household survey. In addition, it should be noted that the town includes two retail parks Keighley Retail Park on Hard Ings Road and Alston Retail

Park on Bradford Road. Keighley Retail Park contains 6,039 sq. m of floorspace whilst 6,998 sq. m.

- 8.126 On this basis, analysis of the household survey identified that the current level of trade passing through existing facilities in Keighley (this exclude Retail Parks) is estimated to be £266.9m. This represents 15% of the total comparison goods expenditure (£1,754.4m) generated within the study area. The results also found that £33.3m of comparison goods expenditure was spent at Keighley Retail Park, which represents 1.9% of the available expenditure in the Study Area. A further £4.2m was spent at Alston Retail Park, which represents 0.2% of the available comparison goods expenditure.
- 8.127 In total we found that all facilities in Keighley (including out-of-centre retail parks) attracted £304.4m of the available comparison goods expenditure in the study area.
- 8.128 By 'rolling forward' Keighley's current market share it is possible to examine the likely comparison goods floorspace required in order to maintain its current market share, namely at a level of approximately 17.1%, which appears to sustain a vital and viable centre. The Household Survey identifies Keighley achieving a comparison goods catchment population of approximately 106,390.
- 8.129 It is forecast that between 2007 and 2022, an additional £451.3m will be available for comparison goods shopping within Keighley.
- 8.130 If no additional comparison goods floorspace was provided within the period up to 2022, then regardless of improved 'productivity' of existing facilities, the majority of this surplus would be lost to competing centres elsewhere. This may lead to the market share falling from its current level of 17% to 15% or worse 10%. Such a decrease could have an adverse affect on the future vitality and viability of the town centre.
- 8.131 Table 8.17 below estimates the likely expenditure that will be available for new comparison goods floorspace by 2022 at current market share.

**Table 8.17: Estimated Available Comparison Goods Capacity**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	304.4	304.4	0.00
2012	327.9	410.7	82.76
2017	353.3	559.4	206.20
2022	380.6	762.3	381.72

Notes: <sup>1</sup> - Allows for increased 'productivity'; at +1.5% per annum

<sup>2</sup> - Assumes constant market share at 17.1% in Study Area and 2.5% for inflow

8.132 Table 8.17 indicates that by 2012 there will be some £82.8m of comparison goods expenditure available for new retail development within Keighley based on current market shares being sustained. This level of expenditure identified to increase to £206.2m by 2017 and to £381.7m by 2022. This amount of expenditure will be available for all comparison goods floorspace (both 'bulky' and 'non-bulky').

8.133 In floorspace terms, by assuming an average comparison goods sales density of approximately £4,000 per sq. m (and allowing for increased productivity at 1.5% per annum), this equates to a floorspace by 2012 for approximately 19,205 sq. m (net) of additional comparison goods floorspace (or 27,436 sq. m gross <sup>3</sup>) within Keighley. This requirement is identified to increase to 44,419 sq. m (net) by 2017 and 76,329 sq. m (net) by 2022.

*Bulky Goods*

8.134 Although PPS6 states that quantitative need should be based on the specific classes of goods to be sold (i.e. convenience and comparison) rather than specific goods such as 'bulky' goods or DIY products it is possible from the Household Survey results to apply the market shares identified for 'bulky' and 'non-bulky' goods and identify capacity available for additional non-food retail floorspace within these two sectors.

8.135 Based on Keighley's (excludes Keighley Retail Park) current market share, existing bulky goods facilities retain 14.9% (or £75m) of 'bulky goods' expenditure generated in the Study Area. The extent of Keighley's bulky goods shopping catchment is shown in **Appendix 11**. In addition, Keighley Retail Park attracted £30.2m of bulky goods expenditure from the study area, which equates to 6%. Alston Retail Park attracts a further £2.4m (or 0.5%) of bulky goods expenditure. All facilities in Keighley are identified to have a catchment population of approximately 132,765.

8.136 Based on current market share, it is estimated that there is 'bulky goods' capacity of approximately £29.3m in the short term (i.e. 2012) increasing to £72.9m by 2017 and £134.9m by 2022.

**Table 8.18: Estimated Available Bulky Goods Capacity**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	107.6	107.6	0.00
2012	115.9	145.1	29.25
2017	124.8	197.7	72.87
2022	134.5	269.4	134.91

Notes: <sup>1</sup> - Allows for increased 'productivity; at +1.5% per annum

<sup>2</sup> - Assumes constant market share at 21.4% in Study Area and no inflow

8.137 By applying a typical sales density of leading 'bulky goods' retailers of £3,000 per sq. m and allowing for increased productivity of 1.5% per annum, over the period to 2022 this need equates to approximately 35,970 sq. m (net) or 51,383 sq. m gross of bulky comparison

goods floorspace within Keighley. As previously advised, this level of capacity is dependent upon the end operator. In the short term, WYG estimate a need for 9,050 sq. m of bulky goods floorspace within Keighley (Subject to end operator).

#### *Non-Bulky Goods*

- 8.138 In terms of non-bulky goods, the Household Survey identifies that existing facilities in Keighley achieve a market share of 15.4% (or £169.8m) from the Study Area, which is comparable to the bulky goods market share. Keighley achieves a non-bulky comparison goods catchment population of approximately 95,533 in 2007.

**Table 8.19: Estimated Available Non-Bulky Goods Capacity**

<b>Year</b>	<b>Turnover - £m<sup>1</sup></b>	<b>Expenditure - £m<sup>2</sup></b>	<b>Surplus Expenditure - £m</b>
2007	196.8	196.8	0.00
2012	212.0	263.8	51.80
2017	228.4	359.4	130.9
2022	246.1	492.9	246.8

Notes: <sup>1</sup> - Allows for increased 'productivity; at +1.5% per annum  
<sup>2</sup> - Assumes constant market share at 15.4% in Study Area and 2.5% inflow

- 8.139 By applying this market share to the available expenditure, our assessment identifies capacity in the short term of £51.8 m (by 2012), increasing to £130.9m by 2017 and £246.8m by 2022. By applying an average non-bulky goods turnover of £5,000 per sq. m (although this is very much dependent on the end operator) this equates to floorspace requirement of 9,616 sq. m (net) in the short term (2012) increasing to 22,564 sq. m (net) by 2017 and 39,484 sq. m (net) by 2022.

#### *Commitments*

- 8.140 From review of the Council's retail floorspace monitoring report (2008) there are a number of outstanding (extant) planning commitments for additional comparison goods floorspace in Keighley. In total we found that there is planning permission for 1,093 sq. m of net floorspace in Keighley Town Centre. WYG estimate that floorspace could have a turnover of between £3.3m and £5.4m depending on the end operators.
- 8.141 In addition to the above central planning permissions there are a number of other planning commitments in out-of-centre locations which need to be considered. From review of the monitoring report (2008) there is approximately 1,890 sq. m (net) of new out-of-centre comparison floorspace. WYG estimate that this will have a turnover of between £5.6m and £9.5m. In addition, we note that there is a significant level of comparison goods floorspace (1,486 sq. m net) proposed in the ASDA store at Bradford Road. WYG estimate that this will have a benchmark turnover of £11m.

8.142 WYG estimate that after taking to account all these existing planning commitments, they would meet 24% (£19.9m) and 31% (£25.9m) of the quantitative need identified (£82.8m) up to 2012.

*Qualitative Need – Comparison Goods*

8.143 Understandably, given its strong role, size and location, Keighley provides a good range of comparison goods shopping, reflected by both the non-bulky and bulky goods market share achieved by its facilities. We believe that a market share of around 15% for both categories of goods is strong and should be retained throughout the plan period.

8.144 Whilst it is generally accepted that Keighley is not going to compete directly with larger centres such as Bradford and Leeds, the centre is still considered an important destination in the RSS and therefore, some improvements to the current provision should be supported. It is important that such improvements in the comparison goods sector are of an appropriate scale and contribute to the future vitality and viability of the centre.

8.145 The retention of bulky goods shopping trips to facilities in Keighley is strong, whereby 66.6% of the available bulky goods expenditure is spent in either Keighley Town Centre, Keighley Retail Park or Alston Retail Park. There may be some limited scope to increase this market share. However, just 14% of bulky goods expenditure was spent outside the District.

8.146 The retention of non-bulky comparison goods to facilities in Keighley was significantly lower than bulky goods at 49%. This is not unexpected as shoppers are more likely to travel longer distances for such non-bulky goods. The results found that there was a significant level of leakage (30.4% or £32m) of non-bulky expenditure to facilities outside the district. WYG believe that there is a need to claw back some of this expenditure by providing appropriate non-bulky provision within Keighley, or alternatively in Bradford District elsewhere. This would help create more sustainable shopping travel patterns by retaining more shoppers in the Keighley area whilst also helping to improve consumer choice and competition in the area.

*Summary*

8.147 In summary, it is clear that Keighley plays a very important role in meeting both the convenience and comparison goods shopping needs of the local population. The town centre has the strongest convenience goods role and function within the District. Our analysis shows that there is significant quantitative need for new convenience floorspace up to 2012, the majority of which will be met through the new proposed ASDA store. WYG also believe that there is a qualitative need to improve the choice and competition within Keighley which



the ASDA store will hopefully address. WYG believe that any further convenience provision should be resisted until the outcome of the proposed ASDA store is clear.

- 8.148 This assessment has found that comparison shopping in Keighley achieves a lower market share than that of convenience shopping. Notwithstanding this Keighley Town Centre plays a key comparison goods role to the local population. Given the significant growth anticipated in comparison goods expenditure our assessment identifies capacity for up to 76,329 sq. m (net) by 2022 (at current market share). In the short term (up to 2012) there is capacity for 19,205 sq. m (net) of new comparison floorspace, of which around 50% should be for bulky goods retailing. There is also a qualitative need identified to improve the quality and range of non-food sector to help reduce the current need of local residents to travel to high order centres such as Bradford and Leeds. In light of this identified need for new convenience and comparison floorspace in Keighley it is important that any additional retail development contributes to the continued vitality and viability of the centre. In addition this development should also seek to be appropriate and well connected to the existing town centre.

### **Shipley**

- 8.149 Shipley is situated in the east of the Bradford District approximately 4 miles to the north-west of Bradford City Centre and 14 miles west of Leeds.
- 8.150 The town centre is dominated by the large purpose built ASDA store. Retailing in the rest of the town centre is focused around the market square which accommodates the outdoor market. The town centre is identified by Experian Goad to comprise 38,800 sq. m of floorspace, resulting in Shipley being the third largest centre in the District after Bradford and Keighley.

#### *Convenience Goods Shopping*

- 8.151 As highlighted in the retail health check of Shipley contained in **Appendix 6**, it is evident that the main convenience goods provision is the ASDA supermarket which represents 73% of all the convenience floorspace in the town centre. Apart from this supermarket, the town centre has limited convenience provision with a number of independent convenience retailers, namely bakers, butchers, newsagents etc. Convenience outlets are below the national average, however, the floorspace of ASDA ensures that the proportion of convenience floorspace is above the national average. If ASDA was taken out then the proportion of floorspace would be below the national average. In addition there is a Aldi store located on within close proximity to the town centre but located outside the primary shopping area.
- 8.152 The Household Survey identifies that facilities within Shipley (including Aldi) retain 5.3% of convenience goods expenditure in the Study Area, which equates to a convenience turnover

of £46.1m. However, the results show that 97% of this expenditure is spent at the ASDA store, demonstrating the dominance of the ASDA store on local shopping patterns. The Household Survey demonstrates that for main food shopping, Shipley has an identified catchment population of approximately 34,209, the second highest town centre in the District.

8.153 In terms of individual foodstores within Shipley, it is understandable that the survey results identify that ASDA store to be the most dominant destination within Shipley attracting £44.7m of convenience goods expenditure generated within the Study Area.

8.154 In terms of capacity for additional convenience goods floorspace within Shipley, Table 8.20 below provides a breakdown of the trading performance of the existing provision in Shipley.

**Table 8.20: Trading Performance of Current Foodstores in Shipley Centre**

Store	Gross Floorspace – sq m <sup>1</sup>	Net Floorspace – sq m <sup>2</sup>	Net Convenience – sq m <sup>3</sup>	Turnover per sq m <sup>4</sup> - £	Benchmark Turnover - £m	Survey Estimate - £m
<b>Shipley Town Centre</b>						
ASDA, Manor Lane, Shipley	6,850	4,110	2,314	14,492	33.53	44.71
Aldi, Tony Miller Approach, Briggate, Shipley	1,250	1,125	1,013	4,283	4.34	0.57
Co-op Late Shops, Wrose Road, Shipley	86	77.4	77.4	5,113	0.40	0.80
Local Shops, Shipley	1,230	1,107	1,107	2,000	2.21	0.80
<b>TOTAL</b>					<b>40.48</b>	<b>46.07</b>

Notes: <sup>1</sup> - Gross Floorspace Derived from Experian Goad (2007) or IGD  
<sup>2</sup> - Gross to net split for existing foodstores based on 60/40 for the ASDA store and 90/10 for remaining stores.  
<sup>3</sup> - Net Convenience floorspace based on information provided by Verdict (2007) for ASDA, WYG judgement for local shops/markets and Aldi and Co-op.  
<sup>4</sup> - Sales density derived from Verdict (2007) and Mintel Retail Rankings for national multiples and WYG assessment for local shops/markets  
 Excludes inflow  
 At 2005 prices

8.155 Our analysis of Shipley Town Centre's market share retains approximately £46.1m of convenience goods expenditure generated within the Study Area. By comparing this estimate with the anticipated 'benchmark' turnover of existing facilities (£40.5m), there would appear to be potential under supply of convenience retail facilities of approximately £5.6m.

8.156 This additional expenditure is likely to be passing through existing shops which in aggregate could be trading above company averages. Our analysis of the performance of the ASDA store on Manor Lane is trading above its expected 'benchmark' turnover (by 33%). In addition the Co-op on Wrose Street is significantly (101%) trading above its benchmark turnover. In contrast local shops and the Aldi store were performing below their respective benchmarks.

8.157 Having regard to this surplus expenditure, it is now important to estimate the likely need for additional convenience facilities within Shipley though to 2022 based on current market share being retained.

**Table 8.21: Estimated Capacity for Additional Convenience Goods Facilities**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	40.48	47.55	7.07
2012	41.50	52.59	11.08
2017	42.55	58.73	16.18
2022	43.62	65.60	21.98

Notes: <sup>1</sup> - Allows for increased turnover efficiency of +0.5% per annum  
<sup>2</sup> - Assumes constant market share at 5.3% in Study Area and 3.2% inflow

8.158 In the short term (i.e. up to 2012) the identified capacity for additional convenience goods floorspace is identified to be £7.1m, increasing in the longer term to £11.1m by 2017 and £22.0m by 2022. It is likely that capacity could be met in a variety of forms, through an extension of existing floorspace, or through the introduction of deep discount retailers (such as Netto, Spar and Lidl). However, given the dominance of ASDA it may be more appropriate to secure a larger format retailer to help increase the choice and competition within Shipley. This may also help increase the market share of Shipley in convenience terms.

8.159 Table 8.2 provides a breakdown of the capacity for additional convenience goods floorspace in monetary and floorspace terms based on the floorspace being occupied by a modern large format retailer (e.g. Sainsburys, Tesco, WM Morrisons, Waitrose, Marks and Spencer) and that based on smaller format retailers (Lidl, Spar, Netto).

**Table 8.22: Quantitative Need for Additional Floorspace in Shipley**

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min <sup>1*</sup>	Max <sup>2*</sup>
2007	7.07	590	1,413
2012	11.08	903	2,162
2017	16.18	1,286	3,078
2022	21.98	1,703	4,079

Notes: <sup>1</sup> - Average sales density assumed to be £11,872/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007)  
<sup>2</sup> - Average sales density assumed to be £5,000/sq m  
\* Allows for increases in turnover efficiency of +0.5% per annum  
At 2005 Prices

8.160 Table 8.22 indicates that over the period to 2012, at current market shares there is a requirement for between 590 sq. m (net) and 1,413 sq. m (net) of additional convenience goods floorspace, dependent upon the end operator and type of development. The need, by 2017 will have increased to between 1,286 sq. m (net) and 3,078 sq. m (net). In the longer term (i.e. to 2022) the need identified increased to between 1,703 sq. m (net) and 4,079 sq. m (net).

8.161 Accordingly, based on current market share there appears to be a demonstrable need for a medium to large format supermarket which would have a convenience floorspace of 1,700 sq. m (net), dependent on the end occupier. However, we believe that by 2022, Shipley could sustain a new supermarket.

*Commitments*

8.162 From review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional convenience goods floorspace in Shipley. WYG can also confirm that there are no out-of-centre convenience goods floorspace commitments around Shipley.

*Qualitative Need – Convenience Goods*

8.163 Shipley Town Centre is identified to contain just one supermarket, the ASDA at Manor Lane. This store dominates the role and function of the existing town centre and is the most popular destination in the area. Shipley does benefit from a range of independent convenience retailers. However, this is not sufficient to provide customer choice and competition. These stores offer a limited range of convenience goods when compared with the ASDA store. Indeed, these facilities offer little more than top-up food shopping provision for the local catchment.

8.164 £30.9m (or 67%) of the £46.1m town centre's turnover was derived from these three Zones. In addition, we found that these three Zones generated £94.7m at 2007; therefore, Shipley only has a market share of around 32.6%. WYG believe that there is scope for Shipley to claw back some of this expenditure and reduce the amount of expenditure (£28.4m) that is lost to facilities in Leeds.

8.165 Given the over trading and dominance of the ASDA store and the leakage of expenditure from the local area, it is considered that there is a qualitative need to improve the convenience goods offer within Shipley for a modern supermarket or foodstore to meet the needs of the local community. This would also help to improve consumer choice and competition in the Shipley area as well as fostering regeneration.

*Comparison Goods Shopping*

8.166 As highlighted in the health check of Shipley town centre, the comparison goods offer in Shipley is not as well represented as the convenience goods sector. Both the proportion of comparison goods floorspace and outlets are below their respective national averages. However, the town centre only contains a small number of key attractors including contain Wilkinson, Woolworths, Boots and Specsavers. In addition the town centre does contain a diverse range of independents.

- 8.167 The Household Survey identifies that existing facilities in Shipley Town Centre achieve a comparison goods turnover (both bulky and non-bulky) of £45.1m. This represents a market share of 2.6% of the total comparison goods expenditure generated in the Study Area. The centre also benefits from 1.1% inflow from outside the Study Area. Therefore, the total turnover of Shipley Town Centre was £45.5m.
- 8.168 By 'rolling forward' Shipley's market share, it is possible to examine the likely levels of additional comparison goods floorspace required in order to maintain its current market share.
- 8.169 It is forecast that between 2007 and 2022, an additional £68.4m will be available for comparison goods shopping within Shipley.
- 8.170 If additional comparison goods floorspace is provided within the period up to 2022, then regardless of improved 'productivity' of existing facilities, the majority of this surplus would be lost to competing centres elsewhere. Consequently, Shipley's market share for all comparison goods floorspace could potentially fall from its current level by 2022.
- 8.171 Table 8.23 below estimates the likely expenditure that will be available for new comparison goods floorspace within Shipley by 2022 at current market share.

**Table 8.23: Estimated Available Comparison Goods Capacity**

Year	Turnover - £m <sup>1</sup>	Expenditure - £m <sup>2</sup>	Surplus Expenditure - £m
2007	45.5	45.5	0.00
2012	49.0	61.4	12.36
2017	52.8	83.6	30.81
2022	56.9	113.9	57.03

Notes: <sup>1</sup> - Allows for increased 'productivity'; at +1.5% per annum

<sup>2</sup> - Assumes constant market share at 2.6% in Study Area and 1.1% for inflow

- 8.172 Table 8.23 indicates that in the short term (up to 2012) there will be £12.4m of comparison goods expenditure for new retail development based on current market share. This level of expenditure capacity is identified to increase in the longer term to £30.8m by 2017 and to £57.0m by 2022. The level of capacity will be available for all comparison goods floorspace.
- 8.173 Although this capacity is dependent upon the end operator (e.g. Retailing warehousing, national multiple, independent etc) by assuming a average comparison goods sale density of approximately £4,000 per sq. m, this equates to a floorspace requirement of 2,869 sq. m (net) of additional comparison goods floorspace by 2012 (or 4,100 sq. m gross). This floorspace requirement will increase to 11,400 sq. m (net) by 2022.
- 8.174 We found that Shipley had a limited retention of bulky goods expenditure. However, we estimate that based on current market shares, a third of all new comparison floorspace in

ShIPLEY should be for the sale of bulky goods, with the remaining two thirds be allocated for the sale of non-bulky comparison goods.

*Commitments*

- 8.175 From review of the Council's planning commitments (2008), we have found that there were no additional comparison goods (floorspace) planning commitments either within ShIPLEY or in out-of-centre locations.

*Qualitative Need –Comparison Goods*

- 8.176 Given the limited size of ShIPLEY Town Centre as a comparison goods destination, there is considerable scope to improve the comparison goods offer in the town centre. However, we consider that this may be difficult to secure given the strength of competing centres which are easily accessible from the town. The town centre is considered to be too close to Bradford and Leeds to be able to sustain major new comparison floorspace.
- 8.177 Despite this it is considered that there is a qualitative need to improve and enhance the comparison goods offer of the town centre, which will contribute towards improving the vitality of the town centre. WYG recognise that there are a number of vacancies (4,940 sq. m) in ShIPLEY which could accommodate the identified capacity in the short term. However, the configuration of these units is inappropriate for modern retailing practices and such outlets need to be more flexible and large to be attractive to the retail sector.
- 8.178 A key consideration will be the recycling of retail floorspace in ShIPLEY to help accommodate the identified need. It will only be through physical regeneration that ShIPLEY will be able to accommodate the identified capacity.

*Summary*

- 8.179 In retail floorspace terms, ShIPLEY is identified to be the fifth largest centre within the District, behind Five End Lanes District Centre. As with Keighley, ShIPLEY's role is predominantly a convenience goods and service centre with the ASDA store being a popular main food destination. At current market shares, our analysis identifies capacity for between 590 sq. m (net) and 1,413 sq. m (net) by 2012, dependent upon the end operator. There is also a qualitative need to improve the main food convenience goods offer and to reduce the dominance of the ASDA store. This would help reduce the overtrading that the ASDA store benefits from and will also allow improve consumer choice which will promote competition.
- 8.180 ShIPLEY performs a limited role as a comparison goods shopping destination, which is mainly due to its limited comparison goods offer. At current market shares, our assessment identifies capacity for up to 2,869 sq. m (net) by 2012 dependent upon the end operator. WYG estimate that a third of the identified capacity should be for bulky goods retailing. There

are limited commitments to satisfy this demand. WYG believe there is qualitative need to improve and enhance the current market share and to increase the current market share. However, we recognise Shipley's geographic position in the District may hinder the latent demand to satisfy the identified need.

### **Potential Growth of Internet Sales**

8.181 Whilst there is the potential for the market share of Bradford District to improve through enhanced provision it is also important to take into consideration the potential growth of shopping on the internet.

8.182 As highlighted in Section 2 of this Study, it is likely that online shopping will continue to grow and have an impact upon floorspace requirements within the District and beyond. Indeed, it is considered that the potential growth of online retailing will have a greater impact upon smaller centres such as Keighley, Ilkley and to some extent Shipley than larger regional centres such as Bradford. We do not consider that Bingley would be affected by the growth of internet sales given its service function. However, analysis undertaken by Experian identifies that there is a high degree of uncertainty in projecting the uptake of new technology and therefore the growth of internet shopping. It could be the case that much of the speculation about online sales could turn out to be hype and the recent growth is a one-off result of the boom in broadband uptake. Notwithstanding this, the likely growth in online sales remains an important consideration and it is important to assess the implications of this sector increasing in the future.

8.183 The modelling outlined in this study is based upon the current market shares achieved for on-line/catalogue sales identified the Household Survey for each type of good identified. These are identified as follows:

- Convenience goods shopping - 1.6% of total expenditure
- Comparison goods shopping - 6.6% of total expenditure
  - Clothing & Footwear* - 4.9%
  - Furniture* - 3.7%
  - DIY* - 1.4%
  - Electrical* - 13.5%
  - Books, CD's, DVD's* - 21.9%
  - Other Small Household Goods* - 6.5%
  - Recreation Goods* - 7.3%
  - Chemist Goods* - 3.1%

8.184 The Household Survey identifies relatively high levels of market shares achieved by online sales. However, research undertaken by Experian forecasts that this market share could increase to 6.2% for convenience goods and to 12.3% for comparison goods by 2012 and further still to 6.5% for convenience goods and to 12.4% for comparison goods by 2015.

8.185 By assuming these potential increases in Special Forms of Trading (SFT) by 2012 and 2015 compared to that adopted for the assessment outlined above (which is based on assuming a constant level through to 2022) it is notable that the capacity identified for additional retail floorspace will reduce, as demonstrated at Table 8.24.

**Table 8.24: Potential Impact of Increased Special Forms of Trading (2007-2022)**

Sector	Capacity (£m)			
	2012		2022	
	<i>Constant SFT</i>	<i>Increasing SFT</i>	<i>Constant SFT</i>	<i>Increasing SFT</i>
<b>Comparison Goods</b>				
Bradford	135.0	128.4	624.0	505.0
Bingley	2.8	2.4	13.0	10.5
Ilkley	11.2	10.7	51.5	41.7
Keighley	82.8	78.7	381.7	308.9
Shipley	12.4	11.8	57.0	46.1
Bradford District *	288.8	250.8	1,332.3	1,077.9

Notes: WYG (2007)

8.186 Table 8.24 demonstrates that the potential increase in internet sales could have a significant impact upon future capacity within the District.

8.187 With regard to comparison goods capacity, by assuming an increase in internet sales, capacity within the District is identified to reduce from £288.8m in 2012 to £250.8m, representing a reduction of more than £38m. Similarly, by 2022 the comparison goods capacity is identified to reduce from £1,332.3m to £1,077.9, a reduction of more than £254m. Accordingly, the capacity within each of the main town centres will also reduce should online sales increase. For example, comparison goods capacity within Bradford City is identified to reduce from £624m to £505m by 2022.

8.188 Based on this forecast reduction in capacity, in floorspace terms this equates to a floorspace requirement (based on an average sales density of £4,000/sq m and allowing for increased turnover efficiency of +1.5% per annum) within the District reducing from approximately 266,415 sq m (net) to 215,539 sq m (net) by 2022, a reduction of some 50,876 sq m (net) of floorspace.



8.189 Clearly, the potential growth in internet sales and other forms of trading will have an impact upon the future capacity for additional comparison goods floorspace within the District. However, it is important to note that the actual impact of growth in internet sales is currently difficult to accurately assess. Therefore, it is important that the potential impact of online sales is monitored on a regular basis.

### Overview

8.186 The total turnover of the five main town centres in the District is identified to be £1,120.9m (convenience and comparison goods). The seven District Centres also have a total turnover of £299.7m. The network of local centres together had a total turnover of £95.1m. In total the assessment found that all facilities in the District had a total turnover of £1,687.8m. In addition, the assessment found that £40m of expenditure was from inflow. Table 8.25 summarises the hierarchy, turnover and the market share achieved by the three main centres within the District derived from the Study Area.

**Table 8.25: Hierarchy and Market Share of Main Centres within the District**

Centre	Convenience (£m)	Comparison (£m)	Total (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)*	Inflow (£m)
<b>Town Centres</b>						
Bradford	32.3	477.5	509.8	19.5	25.7	20.7
Bingley	8.2	10.4	18.7	0.7	0.9	0.1
Ilkley	32.1	40.4	72.5	2.8	3.6	0.7
Keighley	166.3	262.5	428.8	16.4	21.6	7.2
Shipley	46.1	45.1	91.2	3.5	4.6	1.8
<b>Total</b>	<b>284.9</b>	<b>836.0</b>	<b>1,120.9</b>	<b>42.8</b>	<b>56.4</b>	<b>30.5</b>
<b>District Centres</b>						
Five Lane Ends	36.4	14.1	50.5	1.9	2.5	0.6
Girlington	46.6	14.1	60.7	2.3	3.1	1.4
Greaton Horton	32.7	14.9	47.6	1.8	2.4	
Greengates	12.7	8.2	20.9	0.8	1.1	0.8
Mayo Avenue	41.6	3.4	45.1	1.7	2.3	
Thornbury	43.4	24.3	67.6	2.6	3.4	4.6
Tong Street	3.8	3.5	7.3	0.3	0.4	2.0
<b>Total</b>	<b>217.2</b>	<b>82.5</b>	<b>299.7</b>	<b>11.5</b>	<b>15.1</b>	
Local Centres	60.8	34.3	95.1	3.6	4.8	
Out-of-Centre	79.0	93.1	172.1	6.6	8.7	
<b>Total</b>	<b>641.8</b>	<b>1,046.0</b>	<b>1,687.8</b>	<b>64.5</b>	<b>100.0</b>	<b>39.9</b>

Notes: WYG (2007)

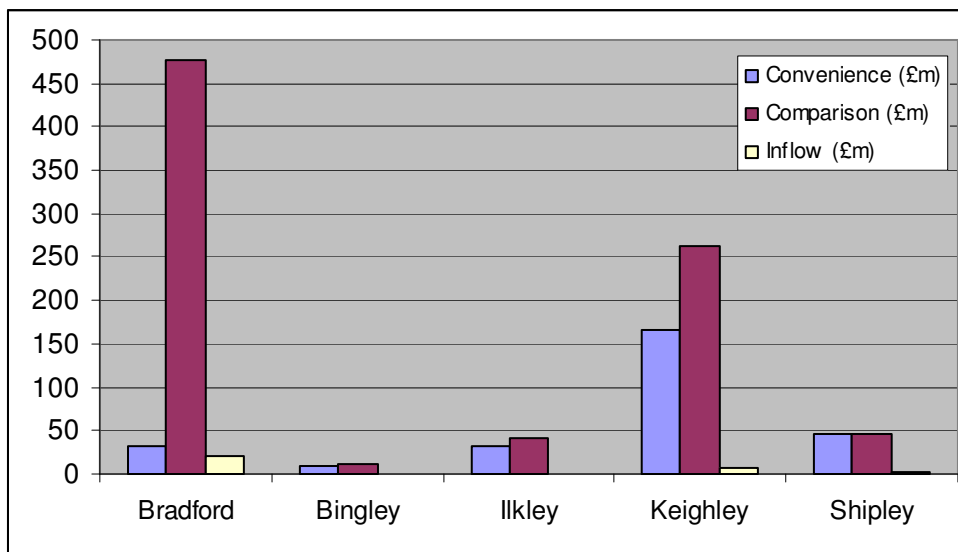
8.187 Our analysis indicates that Bradford and Keighley are the two key destinations achieving the highest retail turnovers, achieving comparative market shares (20% and 16% respectively) within the Study Area. Therefore, it is evident that currently both centres serve important roles within their particular catchments within the District. However, we should note that both

have contrasting roles and functions, whereby Bradford is dominated by comparison shopping and Keighley as a convenience goods destination.

8.188 The turnover of Bradford City derived from the Study Area is identified to comprise approximately 94% comparison goods and 6% convenience goods. Similarly inflow is primarily attracted for the comparison goods sector, reflecting Bradford’s sub regional status. Keighley is identified to have a retail turnover of £428.8m, which is lower than that achieved by Bradford. The retail turnover of Keighley comprises 39% convenience and 61% comparison expenditure.

8.189 In comparison, the other three Town Centres, Shipley, Bingley and Ilkley accounts for only 7% of all retail expenditure generated in the Study Area and 9% of the expenditure directed to the three main centres in Bradford District, reflecting their limited retail offer. The combined turnover of these three centres comprises approximately 47% convenience goods and 53% comparison goods expenditure, underlying the dominance their convenience offer (primarily due to the recent ASDA store development in Shipley and the Tesco in Ilkley) compared to its comparison goods offer. Figure 8.1 illustrates the distribution of retail turnover to the five main town centres within the District.

**Figure 8.1: Breakdown of Turnover between the Five Main Town Centres**



Source: WYG (2007)

8.190 The five main town centres within the District all serve both a convenience and comparison shopping role at varying levels. However, Bradford and Keighley are clearly the main retail destinations in the District and should continue to be the main focus of major retail development in the future (particularly Bradford, which is identified in the RSS as a key growth centre). Table 8.23 provides a summary of the role of the five main town centres and the seven District Centres within the District based on the Study Area (broadly the Bradford District).

**Table 8.26: Summary of the Main Centres (2007)**

Centre	Floorspace (sq m) <sup>1*</sup>	Catchment Population <sup>2</sup>			Market Share (%) <sup>2</sup>		Capacity (£m) – 2022 <sup>3</sup>	
		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
<b>District Centres</b>		-	-	-	<b>25.2</b>	<b>3.32</b>	<b>47.80</b>	<b>106.85</b>
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
<b>Local Centres</b>	<b>57,131</b>	<b>22,931</b>	<b>22,931</b>	<b>22,931</b>	<b>7.1</b>	<b>1.96</b>	<b>-1.57</b>	<b>43.07</b>
<b>Out-of-Centre</b>	<b>-</b>	<b>47,192</b>	<b>47,192</b>	<b>47,192</b>	<b>9.2</b>	<b>5.30</b>	<b>23.28</b>	<b>116.69</b>

Notes: <sup>1</sup> - Floorspace derived from Experian Goad for Bradford, Keighley, Bingley, Shipley, Ilkley and WYG for all District Centres. Floorspace figure for \*Bradford excludes the Tesco store at Peel Centre.

<sup>2</sup> - Catchment and market share derived from Household Survey (2006) based on Study Area only

<sup>3</sup> - Assumes constant market share for each centre

- 8.191 Based on the current performance of the main town and district centres, Keighley is identified to be the strongest convenience goods retail destination than any other centre in the District. 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) play more important roles for convenience shopping than some of the town centres (Bingley, Bradford, and Ilkley).
- 8.192 The result illustrate the 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 a more important bulky and non-bulky comparison role, than Town Centres such as Ilkley and Bingley. The results also demonstrate the important role the network of local centres provide to 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.
- 8.193 The results of the household survey shows that the hierarchy of centres defined by the Replacement UDP need to be reviewed and explored to evaluate whether these are still relevant.

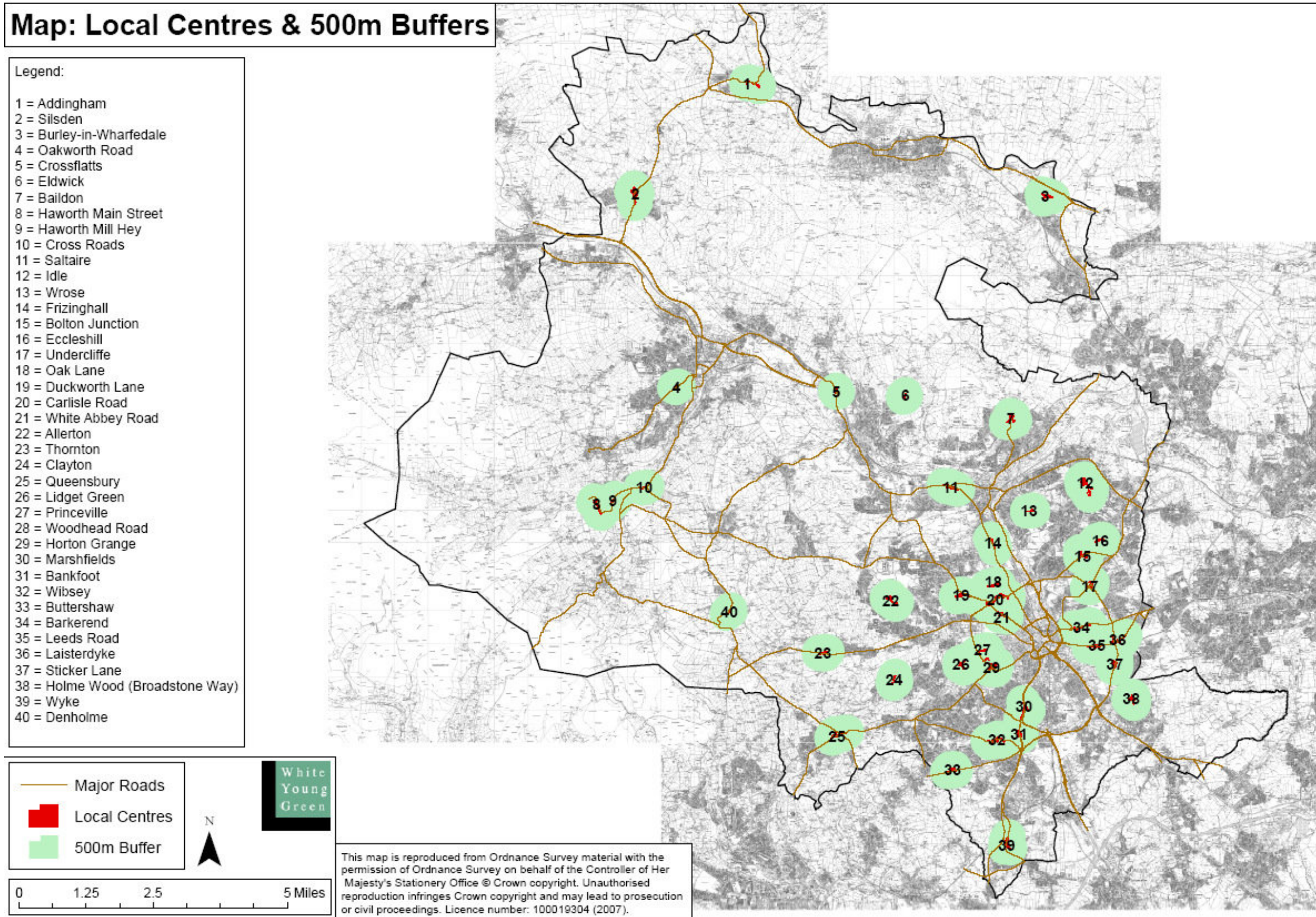
## 9 ROLE OF LOCAL CENTRES AND ACCESS TO RETAIL IN BRADFORD DISTRICT

### Background

- 9.01 Local Centres are an important part of the shopping provision within any authority area as they complement the retail, leisure and service provision in larger centres within the District. PPS6 (paragraph 2.15) recognises the importance of local centres and states that: **‘...local planning authorities should, through the core strategy development plan document, set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.’** (Our emphasis).
- 9.02 Furthermore, PPS6 states (paragraph 2.55) that: **‘...a network of local centres in an authority’s area is essential to provide easily accessible shopping to meet people’s day-to-day needs and should be the focus for investment in more accessible local services, such as health centres and other small scale community facilities. The mix of uses in local centres should be carefully managed.’**
- 9.03 PPS6 highlights that whilst larger centres have been the focus for much development and investment, local authorities should consider whether a more balanced network of centres should be developed within their area. In particular, they should strengthen local centres by seeking to ensure that there is a range of facilities in local centres, consistent with the scale and function of the centre, to meet people’s day-to-day needs, particularly in deprived areas.
- 9.04 Given this, paragraph 2.58 of PPS6 advises that:
- ‘Local authorities should, where appropriate, seek to protect existing facilities which provide for people’s day-to-day needs and seek to remedy deficiencies in local shopping and other facilities to help address social exclusion.’**
- 9.05 Annex A to PPS6 defines a local centre as:
- ‘A range of small shops of local nature, serving a small catchment. Typically local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and laundrette. In rural areas, large villages may perform the role of a local centre.’**
- 9.06 WYG has undertaken an assessment of 40 local centres which are contained in **Appendix 8**.

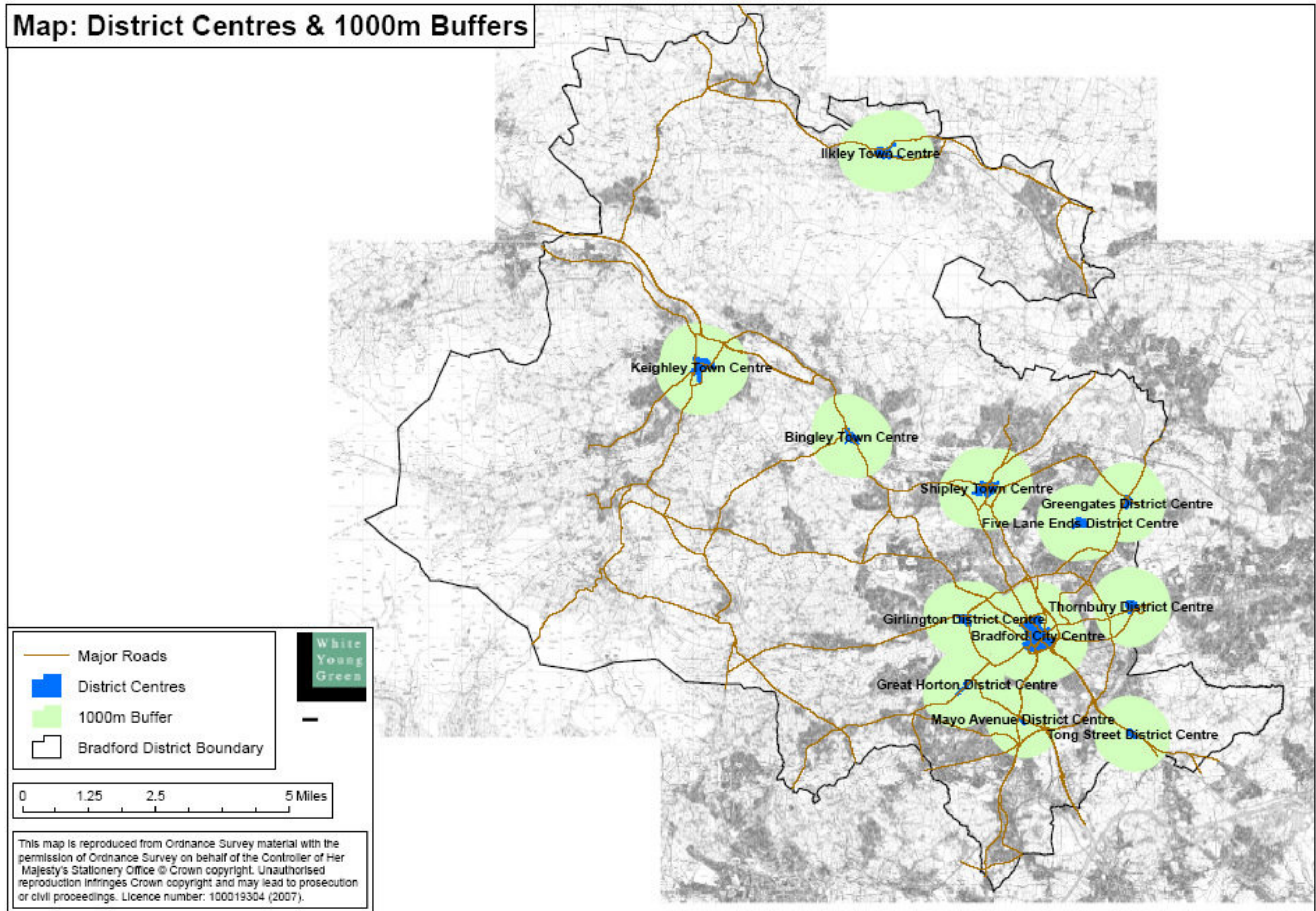
- 9.07 WYG has identified the network of local centres within the study area to understand the geographical spread of the centres and how they met the district's resident's local shopping needs. Figure 9.1 overleaf shows the geographical position of the network of 40 local centres in the District.
- 9.08 We note that local centres play an important role in meeting the districts day to day shopping and service needs. Indeed, the results of the study found that together the local centre attracted £95m of retail expenditure. The results found that just over two thirds (or £61m) of this expenditure was convenience goods expenditure illustrating that daily role and function. It is therefore important that this network of centres is maintained if not enhanced over the plan period. Together the network of local centres influence around 23,000 people.

Figure 9.1: Bradford District's Network of Local Centres



9.08 WYG believe that a maximum (or acceptable) walking distance to a local centre should not exceed 500 metres. Figure 9.1 illustrates a reasonable walking distance from each of the 40 centres. The figure shows that not all of the urban area is within reasonable walking distance to a local centre. Therefore to provide a complete picture we have also included information on the existing network of town and district centres. For these larger centres we have assumed that the reasonable walking distance would increase to 1,000 metres. Figure 9.2 below shows the walking distances from the town and district centres. Figure 9.2 below shows that much of the district area is within 1,000 metre walking distance from a town or district centre.

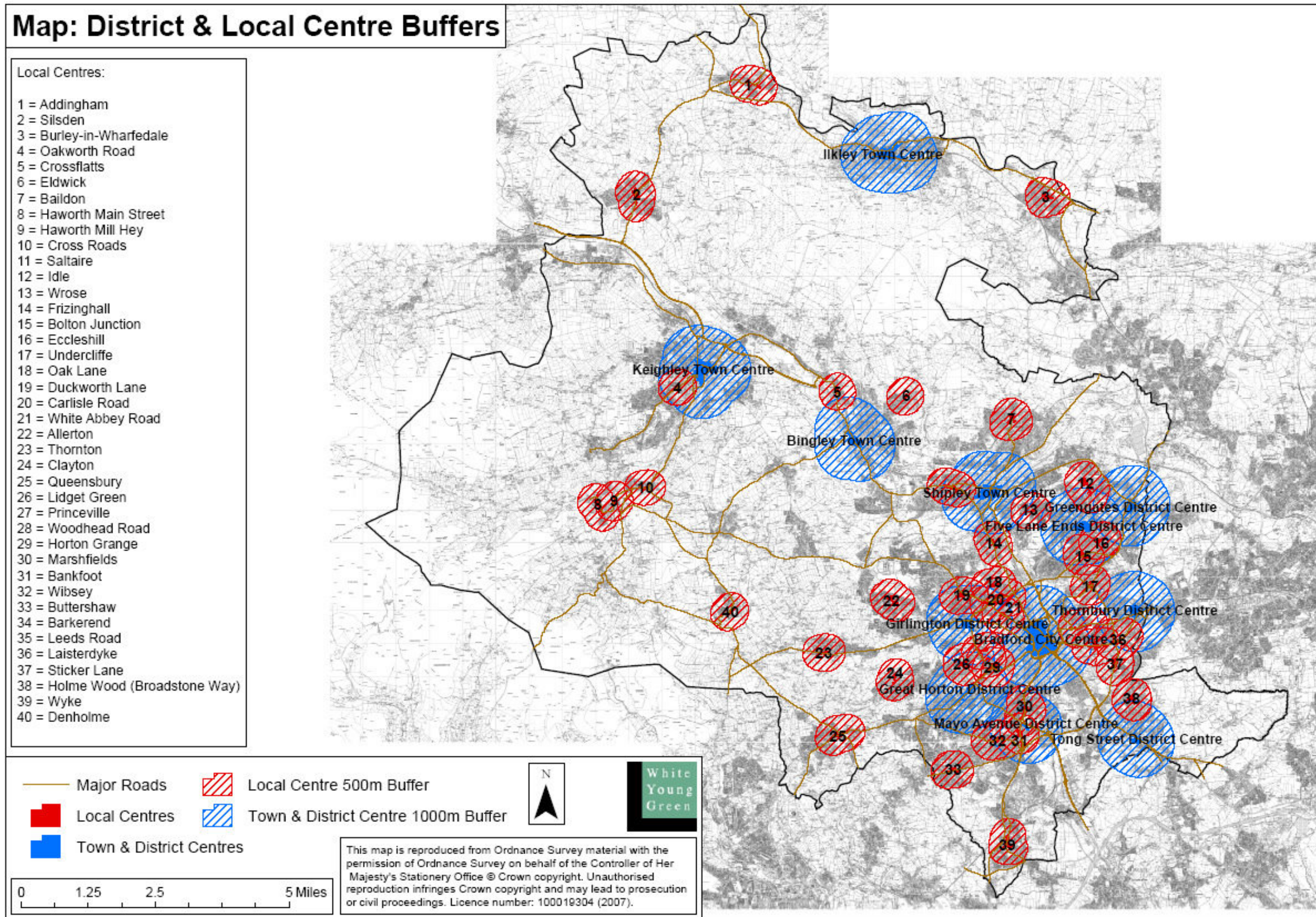
Figure 9.2: Bradford District's Network of Town and District Centres





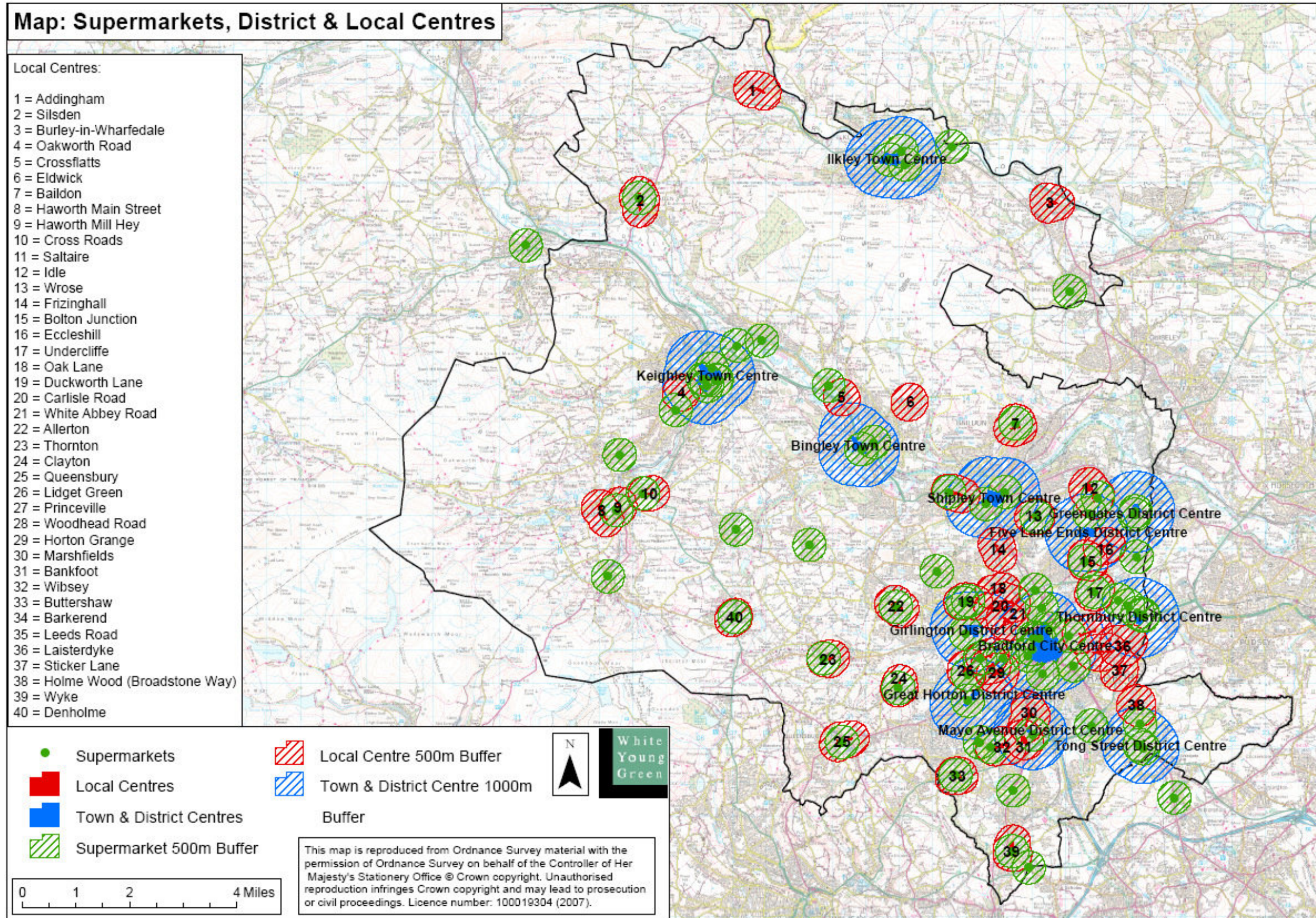
9.09 For completeness, Figure 9.3 below shows the geographic spread of all town, district and local centres in Bradford District. The combination of all the centres shows that the vast majority of the urban area of the District is within reasonable walking distance of shopping and service provision. However, there are some exceptions, on the periphery of the main Bradford conurbation area where there is limited provision.

Figure 9.3: Town, District Centre and Local Centres Network



9.10 From the results of the Household Survey we have also been able to plot the main food destinations visited by the District's residents. Figure 9.4 below shows that the majority of the urban area of the district is within easy access to existing retail provision that satisfies the daily shopping needs of the population.

Figure 9.4: Distribution of Main Food Destinations, Town, District and Local Centres



## 10 LEISURE PROVISION AND CAPACITY WITHIN BRADFORD

### Background

10.01 In order to establish commercial leisure patterns within the Bradford area, it is possible to examine the results of the Household Survey which asked specific questions on where and how frequently residents undertook leisure activities. The Household Survey asked questions relating to the following leisure activities:

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

10.02 A copy of the questionnaire and full tabulations of the Household Survey is contained at **Appendix 2.**

### Existing Provision

10.03 The District has a diverse range of leisure facilities within it. In terms of cinemas, the District contains a 13 screen Odeon Cinema at Gallagher Leisure Park, a 2 screen cinema at The Picture House, Keighley, and a 3 screen cinema at the National Media Museum which includes an IMAX screen. 10-pin bowling facilities in the District comprise Hollywood Bowl at Vicar Lane, Bradford (28 lanes), AMF Bowling at Keighley (20 lanes) and Go-Bowling at Shipley Lanes (12 lanes). In addition to small and informal bingo clubs, large format bingo halls in the District include Buckingham Bingo, Bradford Interchange; Mecca Bingo, Little Horton, Bradford; Gala Bingo, Tong Street; Oxford Bingo, Dudley Hill Road, Bradford; and Gala Bingo, Alice Lane, Keighley.

Table 10.1: Leisure in Bradford

Leisure	No.
Cinema Screens	15
Bowling Lanes	60
Bingo Halls	5

10.04 The District contains a wide array of gyms, and health clubs, both private membership and publically run facilities. These include amongst other facilities: Manningham Sports Centre, Carlisle Road; Richard Dunn Sports Centre, Rooley Avenue; Esporta, Gallagher Leisure

Park, Thornbury; Fitness First, Worth Way, Keighley; Soccer City, Leaverthrope Lane, Thornton; Virgin Active, Cardigan Fields, Kirstall; and Ilkley's Lido.

- 10.05 With respect to the evening economy the Alhambra theatre and St George's Concert Hall are both located in Bradford City Centre, and a large number of bars, public house and nightclubs are located across the District.. The District contains a high number of restaurants offering specialist cuisine from around the world, reflecting the multi-cultural diversity of the Districts residents. Such leisure facilities are concentrated in Bradford City Centre primarily together with the other defined town centres, although they can be found in varying quantities throughout Bradford District.

### **Existing Leisure Patterns**

- 10.06 Set out below is our assessment of current leisure patterns within the defined Study Area as identified by the Household Survey. Full tabulations are contained at **Appendix 12**.

#### *Cinemas*

- 10.07 Within the defined Study Area, the Household Survey identifies that approximately **44%** of respondents visited the cinema. Of these, most respondents (63%) indicated that they visited the cinema less than once a month, compared to only 13% of respondents visiting the cinema at least once a fortnight.
- 10.08 Of the respondents who indicated that they visited the cinema, some 65% usually visited cinemas within Bradford District. Within the District the most popular cinema to visit was the Cineworld, Leisure Exchange, Vicar Lane, Bradford (37%). This was followed by the Odeon Cinema, Gallagher Leisure Park, Thornbury (19%), The Picture House Cinema, Keighley (8%) and Odeon Cinema, Piccadilly Bradford (1%) (although this has now closed) were also popular. Outside of the District the most popular cinema destinations were identified to be Showcase Cinema, Gelderd Road, Birstall (14%), Vue, Cardigan Fields Leisure Centre, Kirstall (9%) and Vue, The Light, The Headrow, Leeds (4%).
- 10.09 Unsurprisingly the Household Survey suggests that the Cineworld in Bradford is most popular in the zones that are nearest to Bradford City Centre, with a market share of 86% in Zone 14 and 66% in Zone 13. Similarly the cinema in Keighley draws most of its custom from Zone 2 (60%), Zone 1 (40%) and Zone 5 (39%). Leakage is highest in the zones that border neighbouring authorities, with the Showcase Cinema in Birstall being the most popular destination in Zone 9 (47%) and Zone 8 (39%) and the Vue Cinema, Kirstall, Leeds being the most popular in Zone 5 (42%) and Zone 18 (32%).

10.10 In terms of the age breakdown of respondents who visit the cinema, the Household Survey suggests that within the 18 to 34 year old age band, some 62% of respondents visit the cinema, compared with 56% within the 35 to 54 year age band and only 25% of respondents aged 55 years or older. This reflects the popularity of this activity with the younger population.

*Cinema capacity*

10.11 As previously highlighted, Bradford District contains a number of existing cinema facilities within it. Accordingly, in order to make an assessment of future capacity for cinema screens, the current market share of facilities in the District is rolled forward at a constant rate.

10.12 Based on retaining 65% of the Study Area population and based on current average participation rate within the United Kingdom of 2.9 visits per person per annum (as identified by Mintel), our assessment at **Appendix 12** indicates that the District can potentially support ten cinema screens. This would increase to 11 cinema screens by 2022. As such, this would appear to show that the District is currently over-provided for with respect to cinema screens and therefore there is no additional capacity for cinema screens based on current market shares. However, this is based on a retention level of 65% within the Study Area, which could potentially increase depending upon the type of development.

10.13 Although these figures appear to show an over-supply of screens in Bradford at the current time, it should be noted that cinemas may draw from a wider catchment than the Study Area as they are only located within densely populated areas. In addition some screens within the District, for example at the National Media Museum, are not of a standard format and show different types of films directed towards a different audience, for example tourists and world cinema and documentaries. Mintel notes that cinema visits fluctuate significantly over time depending on the type of cinema releases, and given this cinema visitors per person per year may increase in the future, which may lead to additional cinema capacity in the District to 2022.

*Health and Fitness*

10.14 A quarter of respondents (**25%**) within the Study Area participate in health and fitness activities. Of the respondents who did undertake leisure activities, most (87%) indicated that they undertook them at least once a week reflecting the relative frequency of this activity compared to many other leisure activities.

10.15 Of those respondents who stated that they undertook health and fitness activities, some 66% of respondents stated that they visited facilities in the District. In terms of destinations for health and leisure activities, the Household Survey indicated the most popular facility was the Dines First at Horton Park Avenue, Bradford, which had a market share of 7% of those who

undertook such activities. This was followed by Fitness First, Worth Way, Keighley (6%), Richard Dunn Sports Centre, Rooley Avenue, Bradford (6%) and Cannons Health Club, Cottingley New Road, Bingley (5%).

- 10.16 As would be expected, leakage of residents is greatest in the zones which include parts of neighbouring authorities. Retention of health and fitness leisure activities is lowest in Zone 9 (4%) and Zone 10 (20%), whilst retention is greatest in Zone 6 (89%), Zone 13 (87%) and Zone 5 (85%). The most popular health and fitness facility outside of the District was recorded as being the JJB Fitness Club, Charlestown, Halifax, which achieved a market share of 3% predominately due to its importance in Zone 8 (21%) and Zone 9 (27%). This is followed by Canons Health Club, Otley Road, Guiseley (3%), Aireborough Leisure Centre, The Green, Guiseley (3%) and Pudsey Leisure Centre, Market Place, Pudsey (3%).
- 10.17 In terms of the age breakdown of respondents who participate in health and fitness activities, the Household Survey suggests that this activity is particularly popular for respondents within the 18 to 34 age band. Indeed, the Household Survey identifies that some 42% of respondents within this age band undertake this activity. This compares to 31% within the 35 to 54 age band and only 14% within the 55 years or older age band.

#### *Ten-pin Bowling*

- 10.18 Within the defined Study Area, the Household Survey identifies that **26%** of respondents stated that they participate in ten-pin bowling activity. Of those that did, most (70%) respondents indicated that they visited ten-pin bowling facilities no more than once every two months, with only 8% of respondents partaking in this activity at least once a fortnight, reflecting the general infrequency of this activity.
- 10.19 The District contains three ten-pin bowling facilities in Bradford, Keighley and Shipley as outlined above. The Household Survey and statistical analysis contained at **Appendix 12** indicate that of those residents who partake in ten-pin bowling some 72% did so at facilities within the District. Indeed, the most popular destinations for ten-pin bowling was the Hollywood Bowl at Vicar Lane, Bradford, which attracted 47% of all those residents who undertook ten-pin bowling. This was followed in popularity by Hollywood Bowl, Cardigan Fields Leisure Centre, Kirstall (18%), AMF Bowling, Bradford Road, Keighley (16%) and Go Bowling at Shipley Lanes, Shipley (8%).
- 10.20 Leakage was predominately to destinations in Leeds (22%) although Halifax (3%), Huddersfield (2%) and Skipton (1%) also attracted some residents. Leakage to Leeds was highest in Zone 17 (69%), Zone 4 (60%) and Zone 18 (60%), whilst facilities in Halifax draw the majority of their trips from Zone 9 (50%).



10.21 With regard to the age of respondents undertaking ten-pin bowling, the Household Survey suggests that within the 18 to 34 year old age band some 38% participate in this activity, this compares to 39% within the 35 to 54 age band. Unsurprisingly, only 11% of respondents aged 55 years or older participate in ten-pin bowling.

#### *Ten-pin Bowling Capacity*

10.22 The Household Survey identifies a ten-pin bowling participation rate within the Study Area of 26%. As previously highlighted, the District retains 72% of those residents who undertake ten-pin bowling activities. By assuming that this market share and retention remains constant, our assessment identifies residual capacity within the District for up to 33 additional bowling lanes at the current time. By 2012 the residual capacity increases to almost 37 lanes, whilst there is residual capacity for over 47 bowling lanes by 2022. This is based on the assumption that 1,250 persons are needed to support a bowling lane.

10.23 Most modern bowling facilities comprise approximately 20 lanes. Whilst the identified capacity for bowling lanes could increase through achieving a higher market share it is important to note that research undertaken by Mintel (2006) indicates that bowling operators are generally not currently seeking to develop new premises and that patronage rates are currently falling. As such, although there is capacity for a new large-format bowling facility, it is unclear whether such a scheme would be realistic in the current climate. However, any new facility should be directed towards Bradford City Centre in the first instance, followed by other town centres in the District.

10.24 It is important to note that bowling operators seek synergy with adjacent users, in particular cinemas, when choosing sites for new facilities. Therefore, in order to maximise the potential market share achieved by a facility in Bradford together with providing a commercially viable opportunity, sites should be identified which could create a purpose-built leisure destination within the District.

#### *Bingo*

10.25 Within the defined Study Area, the Household Survey identifies that only 8% of respondents participate in bingo. However, of those that do participate in bingo 69% do so at least once a month, and 52% do so at least once a week.

10.26 Of those respondents who stated that they participated in bingo, 82% stated that they visited facilities within the District, primarily to the large-format clubs of Buckingham Bingo, Bradford Interchange (28%), Mecca Bingo, Little Horton Lane, Bradford (23%), Gala Clubs, Tong Street (12%), Gala Clubs, Keighley (10%). Outside of the District, the most popular facility is Mecca, Broad Street, Halifax (3%) followed by Leeds (2%).

10.27 There are varying patterns of usage of bingo facilities across the survey zone. The Gala Club at Keighley dominates in Zone 1 (100%), Zone 2 (84%) and Zone 5 (53%). The Mecca Bingo at Little Horton Lane is most popular in Zone 8 (55%) and Zone 9 (52%), whilst Buckingham Bingo at Bradford Interchange draws a significant number of trips from Zones 5 to 18.

10.28 In terms of the age breakdown of respondents who participate in bingo, the Household Survey suggests that this activity is most popular within the 55 and over age group, attracting 11% of respondents within this group. This is followed by the 18 to 34 age band, within which 8% of respondents participated in bingo and 6% of respondents within 35 to 54 year old age band participating in the activity.

#### *Bingo Capacity*

10.29 Currently the District contains five large-format bingo facilities, in addition to a number of smaller and informal bingo within pubs, social clubs, etc. Currently, existing facilities within Bradford District retain 82% of the respondents who participate in bingo. 'Rolling forward' current market share indicates that there is capacity for up to five large-format bingo clubs by 2022, and indeed there is immediately capacity three large-format bingo clubs. This is based on the assumption provided by Mintel that every bingo-goer makes an average of 17.6 visits per year, with a total of 60,000 visits per year required to support a bingo club. It should be noted however that this assessment does not take into consideration small or informal bingo clubs, which will absorb much of this residual capacity.

10.30 It is important to highlight that discussions with bingo operators indicate that current bingo expansions are on hold. As a result of the smoking bans and changing tastes, bingo operators are currently putting expansion plans on hold. As such, although there may be capacity for new bingo facilities in the District, whether or not demand for such facilities remains unclear.

#### *Pubs/Bars/Nightclubs*

10.31 Within the defined Study Area, the Household Survey identifies that **56%** of respondents indicated that they visited pubs. In terms of the age breakdown of people who frequented public houses, some 67% of those aged between 35 and 54 visited the pub compared to 58% aged between 18 and 34 and 47% aged 55 or over.

10.32 In terms of restaurants, the Household Survey indicated that **78%** of respondents undertook this activity. 82% of respondents aged between 18 and 34 visited restaurants, compared to 84% aged between 35 and 54 and 73% aged 55 or above.

10.33 The Household Survey indicated that across the Study Area approximately **13%** of respondents visited nightclubs. As would be expected a greater proportion of respondents

aged between 18 and 34 (35%) visited nightclubs, compared to those aged between 35 and 54 (16%) and those aged 55 and over (2.6%).

## Summary

10.34 Our analysis of the Household Survey suggests the following participant rates for leisure activities by residents in the Study Area:

- 44% participate in cinema activities;
- 25% participate in health and fitness activities;
- 26% participate in ten-pin bowling activities;
- 8% participate in bingo activities;
- 56% visit pubs;
- 78% visit restaurants; and
- 13% visit nightclubs.

10.35 The results indicated that the District is well provided for in the leisure sector, and retention rates were high. With respect to the proportion of residents who undertake cinema trips, the District retains 65% of cinema trips with the Cineworld, Leisure Exchange, Vicar Lane, Bradford (37%) and the Odeon Cinema, Gallagher Leisure Park, Thornbury (19%) being most popular. In terms of health and fitness facilities, 66% of residents visited facilities in the District for such purposes with a high number of sports and health clubs being supported. 72% of respondents in the Study Area who partake in ten-pin bowling do so at facilities located within the District, with the Hollywood Bowl, Vicar Lane, Bradford (47%) account for the largest proportion of bowling visits. With regard to Bingo 82% of those respondents who undertook this activity did so at facilities within the District, with the Buckingham Bingo, Bradford Interchange (28%) and Mecca Bingo, Little Horton Lane, Bradford (23%) being the most prolific.

10.36 In terms of 'capacity', this has been assessed for new cinema screens, bowling lanes and bingo facilities. However, based on realistic retention levels of any new facility, our assessment identified that over the period to 2022, Bradford District could not accommodate any more cinema screens (based on current market share), although an additional 47 ten-pin bowling lanes and a further five large-format bingo clubs. However, these are only indicative figures given that leisure trends are hard to predict and therefore capacity will need to be reviewed on a regular basis.

## **11 POTENTIAL DEVELOPMENT OPPORTUNITIES FOR TOWN CENTRES**

### **Introduction**

- 11.01 This section of the report seeks to build upon the evidence gathered as part of the retail and leisure modelling and capacity exercise set out in Sections 8 and 10, but also refers to the findings of the vitality and viability assessments for the City, Town and District Centres. From analysis undertaken within this study there is anticipated to be significant demand for additional retail goods (particularly comparison) through to the year 2022. Whilst there has been recent evidence of a slow down in overall high street activity, forecasts utilised as part of this study allow for long-term cycles of economic growth and recession. Therefore, the conclusions reached with regard to future need for retail and leisure development, are not simply based on the significant growth that the UK has experienced over the past 5 to 10 years.
- 11.02 With this mind, it is appropriate for Bradford District Council to pro-actively plan to accommodate the need identified to ensure the vitality and viability of key town centres (and District and local centres) are maintained if not enhanced over the emerging plan period. These key considerations are also important if the Government's sustainability and economic development objectives are to be met.
- 11.03 This section provides advice on how the Council should seek to adopt a pro-active approach in the future and ensure that the emerging LDF process will address the needs identified up to 2022. It focuses on the strategic decision making that the Council will need to undertake if it is to maximise the identified potential.

### **The Role of Plans at the Local Level**

- 11.04 PPS6 is clear in stating that local planning authorities should adopt a positive and pro-active approach to planning for all types of centre. This approach should have regard to the Regional Spatial Strategy and reflect the local community strategy. Furthermore, PPS6 states that local planning authorities should, through their Core Strategy, set out a spatial strategy for the network and hierarchy of centres. In this respect Bradford will need to recognise through their strategy the need to review the District's established town, district and local centres and to enhance their role and function as the main focus of community life.
- 11.05 The Core Strategy will also need to consider the direction of the emerging RSS, with Policy YH5 clearly identifying Bradford City Centre as a regional centre. The emerging Core Strategy will also need to ensure that policies are flexible enough to promote sustained growth in key retail and leisure sectors in the City Centre. This will act as a key economic

driver which will help create a thriving and viable shopping destination. This strategy will complement and enhance the already exceptional cultural, civic and commercial base that exists in the City Centre. In addition Policy YH6 identifies Keighley and Ilkley as a principle service centres and will need to be reflected as such in the emerging LDF.

### Convenience Goods

11.06 The market share achieved for all convenience goods facilities in the District is identified to be approximately 74.5% in 2007. Accordingly, around a quarter of the convenience goods expenditure generated in the Study Area is lost to competing centres outside the District, notably to facilities in Leeds (13.2%) and Calderdale (7.4%). Based on current market shares WYG's analysis has identified capacity for up to a maximum of £157.7m in the short term by 2012. This is set to increase to £307.3m by 2022. How this translates into floorspace very much depends upon the end operator. WYG estimate that there is additional convenience goods floorspace of between 8,565 sq. m (net) and 20,507 sq. m (net) depending upon the end operator by 2012 which could increase to between 23,818 sq. m (net) and 57,029 sq. m (net) by 2022.

Table 11.1: Convenience Goods Planning Commitments

Location	Additional Floorpace Sq. m (net)	Turnover £m
Bradford	0	0
Keighley *	2,230	£32.6m
Shipley	0	0
Bingley	0	0
Ilkley **	895	£9.5m
District Centres	2,259	£11.3m to £26.8m
Local Centres	1,875	£9.4m to £22.3m
Out-of-Centre	4,813	£24.1m to £57.1m
Total	12,072	£86.6m to £148m

Source: Retail Floorspace Update – 31<sup>st</sup> March 2008, produced by CBMDC

\* figure relates solely to the proposed for a new ASDA store on Bradford Road;

\*\* figure relates to the Marks and Spencer occupying the former Kwik Save store.

11.07 However, there is a significant level of convenience floorspace already consented in the District, which includes the new ASDA store (2,230 sq. m net) in Keighley and the Marks & Spencer store in Ilkley (895 sq. m). WYG estimate that these two could have a cumulative turnover (based on respective benchmark turnovers – Verdict 2007) if developed of £41.8m. In addition, WYG have found that there is 8,947 sq. m (net) of other convenience goods floorspace permitted in existing district centres (2,259 sq. m); local centres (1,875 sq. m) and at out of centre (4,813 sq. m net) locations elsewhere in the District. Together all

commitments could have an estimated turnover of between £86.6m and £148m (depending on sales density). WYG would suggest that an estimated turnover would be a mid point turnover of £117.3m. With only up to 74% being absorbed by current planning permissions, this means that there is still capacity within the district up to 2012 to provide additional convenience floorspace. After taking into account these commitments and assuming they are all implemented by 2012, WYG estimate that there is expenditure capacity for £40.4m of new convenience provision in the District by 2012. WYG advise the Council that they should regularly monitor and review this position once these convenience commitments are delivered.

### Comparison Goods

- 11.08 The survey evidence gathered as part of this study demonstrates that for comparison goods, Bradford City Centre is by far the biggest attractor in the District. However, the study found, that the quality of the town's comparison goods offer is influenced by the strength of the retail offer found in Leeds City Centre. The comparison goods offer in the City Centre is not of the quality you would expect from a regional centre. Also the neighbouring centre of Halifax influences comparison goods shopping patterns in the study area. Despite the strength of both Leeds City Centre and Halifax Town Centre, it is evident that Bradford City Centre performs a key role in meeting the needs of the local population.
- 11.09 In addition, the study found that Keighley is a popular town centre for comparison goods shopping beyond Bradford City Centre.
- 11.10 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 for comparison goods shopping is less than that achieved for convenience goods shopping (74%), this is not surprising given the strength of Leeds City Centre as the regional centre. The draw of Bradford City Centre accounts for nearly 50% of the district's overall market share demonstrating the important role of the City Centre to the district's residents. However, the results also demonstrate the important role that the network of town (34%), district centres (8%) and local centre (3%) performs in terms of comparison goods shopping activity. This study found that just 8% of comparison goods shopping is undertaken at existing out-of-centre facilities in the District.

Table 11.2: Comparison Goods Planning Commitments

Location	In Centre	Out-of-Centre	Total
	Sq. m (net)	Sq. m (net)	Sq. m (net)
Bradford City Centre	19,411	11,180	30,591
Keighley	1,093	3,376 *	4,469
District Centres	2,259	783	3,042

Local Centres	993	1,808	2,801
Total	23,756	17,147	40,903

Source: Retail Floorspace Update – 31<sup>st</sup> March 2008, produced by CBMDC

\* Asda at Bradford Road, Keighley includes 1,486 sq. m of comparison goods floorspace (restricted by condition)

11.11 In 2007, the district attracted just over £1 billion of comparison goods expenditure. Given the significant growth identified in comparison goods expenditure through to 2022, our analysis (based on current market share) identifies capacity for additional comparison goods floorspace of approximately 72,212 sq. m (net) in the short term (i.e. 2012) increasing to 266,415 sq. m (net) by 2022. The majority of this growth should be targeted towards Bradford City Centre, Keighley Town Centre and Ilkley Town Centre as the three principal centres in the District. However, this does not mean that any future enhancement of Shipley, Bingley and Ilkley should be ignored. In addition the study has found that there is moderate scope to enhance the network of district and local centres where appropriate. However, there is already a considerable level of comparison goods floorspace commitments both within Bradford City Centre but also in out-of-centre locations throughout the District. From the Retail Floorspace Update (2008), and summarised in Table 11.1 above, WYG can confirm that there is 40,903 sq. m (net) of comparison goods commitments in the District overall. Most (47%) of this is directed at Bradford City Centre; however, an additional (42%) is also permitted in out-of-centre locations throughout the District.

11.12 Given the level of comparison goods expenditure leakage to Leeds, Halifax and existing out-of-centre developments both within and outside the district, there is scope to enhance and increase the level of comparison goods provision in the existing network of centres within the district. If the Council are to reverse this leakage and meet regeneration objectives then the Council will need to carefully consider the type and quality of retail operators that should be encouraged to the district.

### Leisure

11.13 The results of the study have found that participation rates for the different range of leisure activities appear to be reasonable. Furthermore, the results indicate that the District is well provided for in the leisure sector.

11.14 This study has demonstrated that the District has a sufficient number of cinema screens and that there it is unlikely to be need for new cinema provision over the plan period. The results have found that current health and fitness facilities are used regularly by the younger generations. The District currently benefits from a wide selection of both private and public health and fitness facilities. WYG believe that if the population of Bradford is to increase significantly over the plan period then there may be quantitative and qualitative scope to

improve on the current health and fitness provision. If population growth is to be focused in and around the City Centre, then additional provision will need to be promoted centrally.

- 11.15 The study has identified that there is capacity to increase the provision of ten-pin bowling type facilities within the District in line with national rates. However, WYG recognise that operators require synergy with other leisure uses when considering new facilities. At the time of this report the bowling sector is not active in the market for new facilities.
- 11.16 The study has found that there was significant capacity for new bingo facilities in the District. Notwithstanding this demand, bingo operators are currently consolidating any expansion plans since the smoking ban came into affect in 2007. The industry is currently developing more internet format solutions rather than the traditional 'hall' format.
- 11.17 The results found that a high proportion of residents visited pubs/bars and restaurants within the District. The results found that all age groups undertake such provision regularly.

#### **Future Role of Existing Town Centre Centres**

- 11.18 Any future development with the study area will need to be carefully considered against Bradford district's long term aspirations for of the key town centres. In addition any strategy will need to be considered against the principles of sustainable development, improved accessibility, employment creation, social inclusion and urban regeneration as set out in the emerging Core Strategy.
- 11.19 In terms of the future direction of the District's town centre it would appear that the there are three choices that the District Council could take. These can be summarised as follows:
- **Do Nothing** – The Council could leave the future development and promotion of the key centres to the open market. Therefore, it would be left to the property market, investors, and retailers to respond to future changes and deliver new or refurbished floorspace when and where necessary. The delivery of approach has the lowest level of financial/resource commitment but ultimately in time, would lead to the decline in the District's key centres role and status within the wider West Yorkshire regional hierarchy.
  - **Maintenance of Current Market Share** – It may be appropriate that some of the key centres in the study area would be maintained and improved modestly to ensure that they retain their current role within the sub region. The aim would be to build on each centre's current strengths rather than seek radical change to significantly impact upon sit fortunes in the future.



- **Expand and Enhance its Status** – It may be appropriate that certain key centres should be significantly expanded and improved in order to enhance their position within the regional and local hierarchy and reinforce their competitive stance against major threats such as the future expansion of Leeds, Halifax or further out-of-centre development. In turn the expansion or enhancement of a particular town centre's status would ultimately seek a higher profile for that particular centre. However, WYG are aware of key constraints including the historic built environment and multiple or absentee ownerships within many town centres, where expansion or refurbishment can be extremely difficult and complex to achieve without significant intervention.

11.20 The Council as part of their Local Development Framework has begun to consider which broad approaches should be explored for some of their existing town centres. The Core Strategy (Issues and Options) has set out the emerging objectives for the District's vision for future development. The emerging strategy does not allow for the do nothing approach. It clearly sets out the Council's intention to attract future growth. This strategy will not only require significant officer resource but also political input, which will require the development of a coherent strategy that ensures that all future development works towards a common goal. This strategy should also not just be confined to development but other Council services, which together should work in unison to deliver the wider economic, social and environmental objectives.

11.21 WYG has provided a independent assessment of the preferred option of the future direction of each of the five town centres and how each one should develop and evolve over the next planning period. This will take into account identified need (capacity), current shopping patterns, deficiencies in provision, and the need to reduce the use of the private motor car.

### **Bradford City Centre**

11.22 The evidence gathered as part of this assessment identifies that Bradford is the dominant retail destination in the district, in terms of comparison goods shopping, but is poor in terms of convenience shopping.

#### Convenience Goods

11.23 There is a limited level of convenience goods expenditure currently being spent in the City Centre, which is limited to the Wm Morrison store at the Westgate and the out-of-centre Tesco store at the Peel Centre. Based on the current market share, WYG believe that there is no quantitative need for new convenience floorspace in the city centre based on current (albeit limited) market share. However, WYG believe that there is a qualitative need to improve and enhance the current convenience goods provision in the City Centre. This need will be further increased once significant residential developments are completed in and

around the city centre. WYG believe that the Council should be looking to explore opportunities to enhance the convenience provision within the city centre over the plan period.

11.24 WYG believe that the introduction of new convenience development will reinforce the convenience goods role of the centre if implemented. Any strategy to encourage new large scale convenience goods provision needs to be balanced with sustaining the future of the market provision in the city centre, which provides both specialist and every day items to local residents.

11.25 WYG acknowledge that it may be difficult to deliver a large site within the limits of the city centre; however, it is important that a key convenience anchor is secured which will complement the future comparison good and service role that the city centre currently provides.

11.26 We believe that the Council should consider the introduction of a number of different formats in the City Centre. This can include the smaller 'local' or 'express' format stores which should be promoted in and around the City Centre. This will offer future residents and workers access to appropriate top-up food provision. The introduction of smaller outlets may also help to increase the market share marginally due to the nature of the retail offer. If the market share is to be enhanced significantly then a large format superstore (+2,500 sq. m (trading)) will need to be delivered. Given the potential site constraints and land costs associated with a central location a large format superstore may be difficult to be accommodated.

11.27 In terms of preferred locations for this store, WYG recognises that the success of the introduction of a supermarket to the growth of the City Centre will be dependent upon the relationship it will forge with the rest of the centre. It is important that any such development is well positioned close to the core of the city centre which will establish linked trips and create strong interaction.

11.28 On examination of the potential sites that could accommodate a new convenience superstore it is evident, that these are limited without significant public intervention. However, there are three areas where a superstore could be provided. These are:

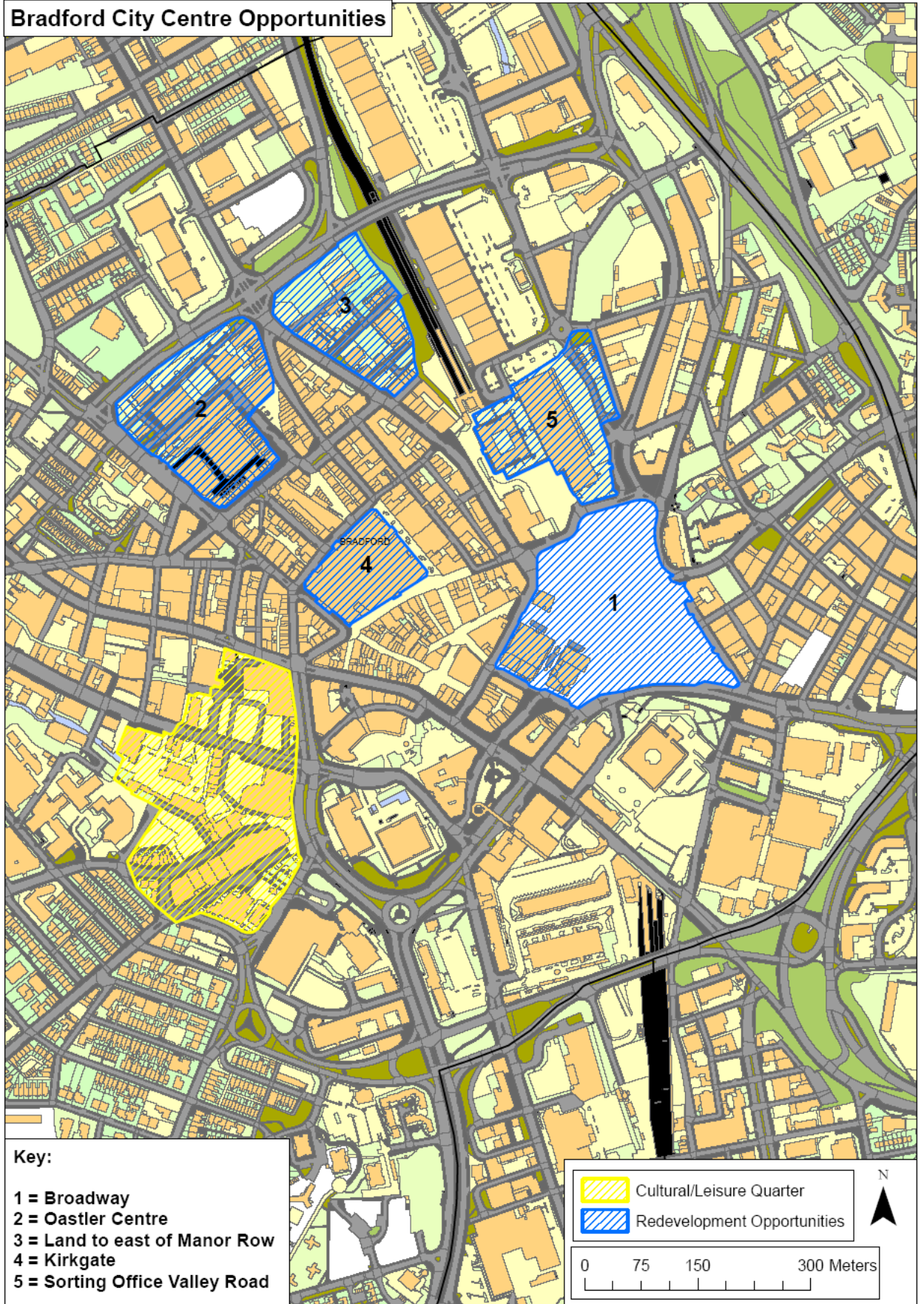
- Oastler Centre Quarter
- Land to east of Manor Row; and
- Sorting Office, Valley Road.

11.29 The current **Oastler Centre** comprises the relatively small Wm Morrisons foodstore and the indoor market hall. Although the centre has benefited from recent refurbishment it is located

in a secondary area within the northern part of the City Centre. The northern area of the City Centre has benefited from the development of the Rawson Quarter, which has introduced a variety of new outlets to the City Centre. WYG believe that when the Broadway redevelopment is realised it could shift the focus of the shopping activity to the south of the city centre. Therefore it will be appropriate to promote a key counterbalance to the proposed Broadway scheme in order to balance the existing City Centre. WYG are aware of the aspirations of WM Morrisons to close their existing operation in the Oastler Centre. This is not surprising given the constrained nature of their current outlet (despite their strong trading performance). WYG feel that the success of the Oastler Centre is determined by the level of footfall to the Wm Morrisons store, therefore any future strategy needs to consider carefully the impact of the potential closure of Wm Morrison.

- 11.30 The current Oastler Centre and land to the north of the centre, (which comprises 3.2ha and includes a mixture of commercial uses and car parking) could be considered as apart of wider comprehensively redevelopment. The site could facilitate a new superstore, indoor market hall and other town centre uses (retail, leisure, civic). WYG believe that this site would reinforce the northern quarter of the city centre and subject to the design, could integrate well with the surrounding built environment and urban form.
- 11.31 The site is located on the ring road, so may be more acceptable in highways terms than if a more central site was to be pursued. The design of the proposals will need to be sensitive to the local character of the built environment especially the new Rawson Quarter.
- 11.32 The northern quarter also includes a second opportunity, which could be considered if the Oastler Centre's redevelopment is not acceptable. WYG has identified the land east of the Manor Row. The site comprises 2.3ha of land and buildings. The site comprises a variety of different land uses including car parking, and a mixture of commercial uses along Manor Row. In addition the site comprises other commercial uses located along Grammar School Road, Hallgate, Sallem Street, Stone Street and Broad Street. WYG believe that this area could be comprehensively redeveloped to deliver a new superstore that will help meet the qualitative deficiency in the City Centre. Highway access could be provided off Manor Row. The site benefits from strong visual presence from the A6181 (Hamm Strasse), which would make it attractive to retailers.

Figure 11.1: Bradford City Centre Redevelopment Opportunities



11.33 The third alternative site for the location of a new superstore is the existing sorting office located on Valley Road, adjacent to Phase 1 of Forster Square Retail Park. The site covers 2.5ha, and is located in close proximity to the proposed Broadway redevelopment. The shape of the site is constrained which may affect its future development for a superstore. Although suitable for redevelopment, WYG consider that the redevelopment of this site for convenience purposes would not necessarily create the counterbalance to the Broadway that could be created from the first two northern quarter sites. The introduction of a superstore in close proximity to the Broadway may place further pressure on the northern area of the City Centre. The post office site may need to be considered alongside the recently built office development adjacent Forster Square Station. This will allow the development to interface with Cheapside, which will promote links with the core of the city centre. This will encourage the regeneration of Cheapside and the area around Darley Street and Piccadilly. If this interface linkage is difficult to achieve a superstore in this locality may draw activity away from the northern area of the City Centre, which may prove detrimental to its vitality and viability. Therefore, the site may be considered more appropriate for further comparison goods retailing of other leisure and town centre uses. The site is considered to be a key link between the City Centre and the proposed 'Bradford Channel' redevelopment proposals.

Comparison Retailing

11.34 Given the significant scope for additional comparison goods floorspace within Bradford City Centre (124,800 sq .m (net) by 2022) if current market share is retained. WYG believe that Bradford City Centre should be looking at worse to maintain its market share in the short term and stem the decline that has occurred in the last 10 years. It is clear that the comprehensive redevelopment of the Broadway Centre will improve the current market share to hopefully levels in excess of those previously attained before its demolition in 2001. Work is scheduled to commence on the new Broadway Centre in 2008, which will create 26,694 sq. m (net) of new comparison floorspace. It is anticipated that this redevelopment will significantly enhance the market share of Bradford City Centre. WYG believe that this development will also have a positive impact on the vitality and viability in the southern quarter of the City Centre.

11.35 Although this scheme should be encouraged careful consideration should be given to the impact on the rest of the city centre. As referred to earlier in this section, there is a danger that the Broadway redevelopment may impact on pedestrian activity within the northern and more central areas of the city centre as footfall is diverted away. Therefore, as discussed earlier the Council should seek to provide a counterbalance/anchor (preferably convenience) development in the northern area of the City Centre to ensure that the activity is dispersed throughout the city.

- 11.36 Subject to the delivery of the Broadway, we believe that the sorting office site could offer a logical expansion of the city centre and the Broadway. The site is strategically well placed to link the Broadway with the mixed use expansion areas of the wider city centre and Forster Square Retail Park. As previously highlighted if the sorting office site could be considered in conjunction with the government office building, together they would create a sizeable redevelopment opportunity. The combination of these two sites would also create greater synergy between Cheapside and Valley Road, which will promote more activity around Cheapside to the south eastern areas of the city centre.
- 11.37 The last opportunity for the City Centre may be the reconfiguration or redevelopment of the Kirkgate Shopping Centre. As the Kirkgate Centre is well managed and is currently at full occupancy it may appear premature to consider this site. However, the implementation of Broadway may lead to certain retailers from the Kirkgate relocating into the new scheme. Therefore, the Council may need to encourage this site as a key central anchor in the historical core of City Centre. The Kirkgate Centre is an important strategic shopping centre that although is aesthetically poor, it provides a key anchor to the City Centre, and as such should be retained and enhanced.
- 11.38 WYG has identified a number of key strategic redevelopment opportunities that could help to enhance the retail offer in Bradford. It is important that the Council must be realistic about future provision as some of the future need or capacity could be met through the re-cycling of existing floorspace or through re-configuration. For example, as identified in the health check, there is a significant level of vacant floorspace (+10,000 sq. m) in the City Centre, which is found in small units, and as such are often too small for modern retailer requirements. WYG would recommend that the Council through positive measures should encourage the re-occupation of these units and make them more attractive to the retail market. Failing this the Council will need to consider alternative uses.
- 11.39 In addition there is also scope to diversify and improve the comparison goods sector in Bradford City Centre, by introducing high quality fashion, clothing, footwear and other durable goods if it is to enhance its retail offer effectively over the plan period. This will allow Bradford to compete more with the likes of Leeds and Manchester. We believe that the redevelopment of the Broadway will help to achieve this as it will offer appropriately sized units which will be attractive to high street retailers.

#### Leisure

- 11.40 Given the limited capacity for new leisure development in the District and given the relatively new Leisure Exchange area to the east of the City Centre, WYG believe there will be limited opportunity to expand this further over the plan period. Notwithstanding this, the Council

should encourage where possible qualitative improvements to the leisure provision within the city centre.

- 11.41 There may be an opportunity to further improve and enhance the area around the Alhambra Theatre and the National Museum of Photography, Film and Television. This could be through the promotion of a cultural and leisure uses, which will complement the existing provision. This would also involve the area around Thornton Road, Great Horton Road and Morley Street. The Council should promote uses such as restaurants, cafes, bars/public houses etc in this area, which would complement the cinema, museum and theatre.
- 11.42 We believe that this will form a logical extension to the success of the Aldermanbury area of the City Centre, which will reinforce the evening economy. The success will be dependent on whether the uses can appeal to a wide range of social/age groups. WYG believe that the main attractions already exist and that these should be built upon over the plan period. The concentration of uses in this area will help disperse the leisure uses in the city centre and this area could complement the Leisure Exchange area of the city.
- 11.43 In summary, WYG believe that the Council should focus on the delivery of the new Broadway Centre in the short term. This redevelopment will accommodate the significant capacity for identified retail floorspace needed to both maintain and enhance current market share. At the same time the Council should also focus on improving the convenience goods offer in the city centre. WYG recommend that the Council should actively promote the introduction of a new supermarket in the northern part of the city centre, this will not only help to enhance the convenience offer in the city centre but will also act as a key counterbalance to the Broadway, which will focus retail activity at either end of the city centre. The need for new convenience provision will be increased if new central residential development is realised. The Council should seek to promote the sites identified in order to improve and enhance the city centre rather than allowing out-of-centre retail floorspace. This strategy will allow the Council to control the location of new development in the future rather than allowing ad hoc development, which may be considered detrimental to the future growth of the city centre.

### **Bingley Town Centre**

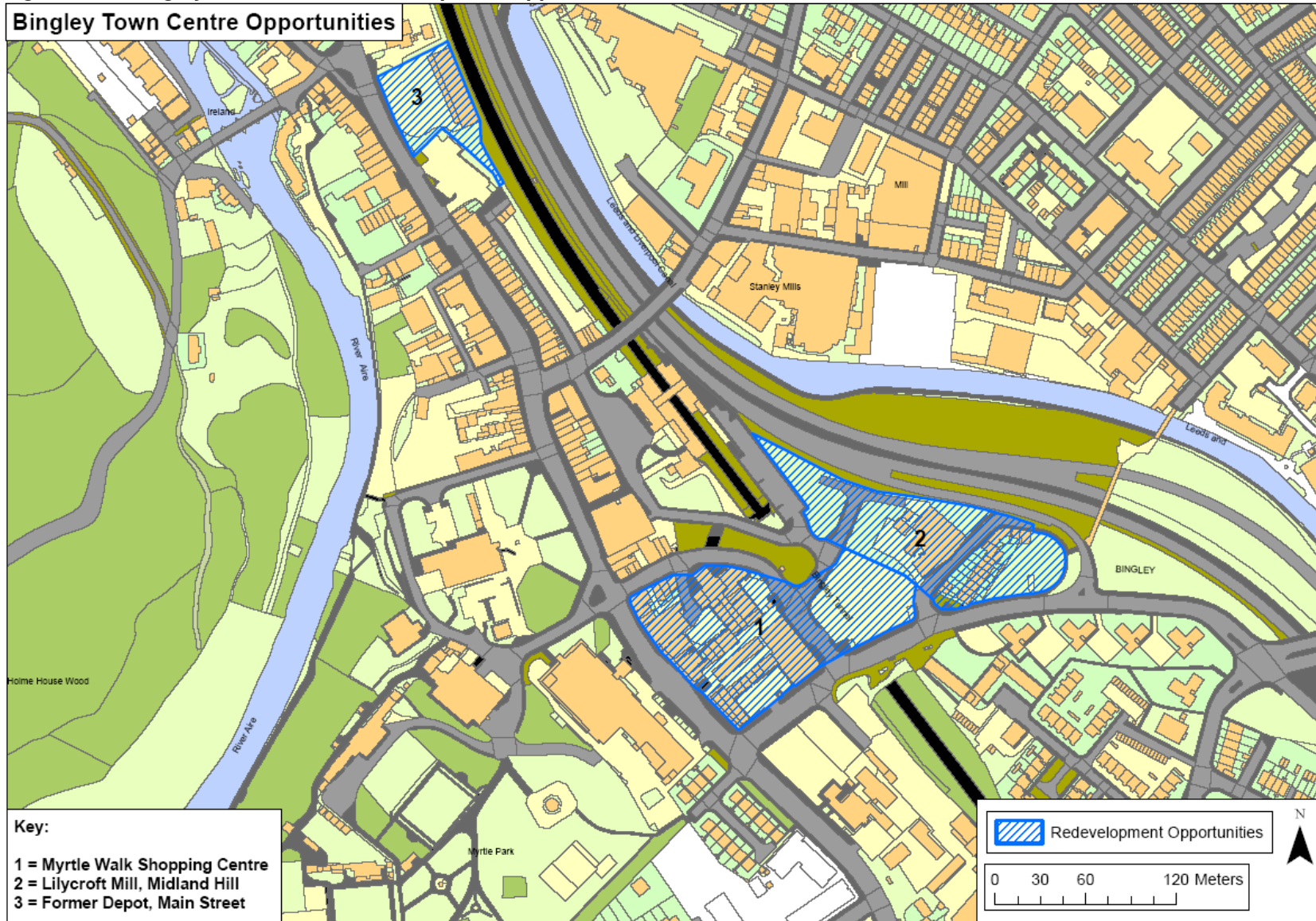
- 11.44 The evidence gathered as part of this study identifies Bingley as having a limited shopping role when compared to other town centres in the District. This study highlights that Bingley retained the second lowest level of expenditure of the District's network of town and district centres. Instead the centre offers more service provision, with over half of the units and floorspace providing services. The town centre environment is considered to be of good quality and has seen improvements to the public realm; however, the Myrtle Walk Shopping

Centre which anchors the town centre remains in a poor state of repair. Despite this the town centre has seen a reduction in vacancies since 2001.

- 11.45 It is clear from the results of the capacity exercise, the centre attracts limited convenience goods expenditure (1% of Study Area). This is mainly due to the centres limited draw. The household survey demonstrates that the majority (77%) of the town's turnover is derived from the local area (Survey Zone 6). The town centre is located between both Shipley and Keighley, which both have better convenience goods provision. The town centre convenience provision is limited to the Co-Op in Myrtle Walk, which is located in the rear of the shopping precinct. Convenience floorspace represents just 12% of the town centre. The level of convenience floorspace has declined since 2001. Therefore there is an undersupply of convenience retail facilities in the town. WYG believe that there is no significant quantitative need for new convenience provision in the town centre based on current market share. However, given the clear deficiency in convenience provision. WYG believe there is scope to increase the current market share through significant improvements to the convenience offer.
- 11.46 Given the decline in the convenience sector and the dominance of the Co-op and the limited choice of convenience provision, we would recommend that the Council should be seeking to enhance convenience provision over the plan period. However, based on the service role that Bingley provides and the need identified, we would advise that this should form a medium sized format foodstore.
- 11.47 Whilst the principle role and function of Bingley is a service destination, the comparison goods offer is also an important element to the function of the centre. Similar to the findings in convenience shopping, the comparison goods offer is also limited (0.6%) but draws on more survey zones than convenience goods. Similarly, since 2001, the comparison goods offer has reduced marginally. Despite this, there is scope to enhance and improve the comparison goods offer through incremental improvements. This may involve changes to existing stock to that would be suitable for modern retailer operators. We have found that the majority of vacant units are small (less than 100 sq. m). Such constrained outlets are not considered acceptable to modern retail practices. The centre suffers from a number of small vacant units, which are more suitable for service operators. Measures should be explored to amalgamate vacant units to create large floorplates that may be more suitable for retail or other uses. It is WYG's view that the recycling of vacant space will accommodate the identified capacity if successfully implemented. In addition, the Council should seek to support the redevelopment of the Myrtle Walk Shopping Centre. This is a key site within the town centre and offers a unique opportunity to deliver comprehensive redevelopment.



Figure 11.2: Bingley Town Centre Redevelopment Opportunities



- 11.48 The Council's main focus for Bingley should be the redevelopment of the Myrtle Walk Shopping Centre. However, there are also two other potential site opportunities. The first relates to the area surrounding Lilycroft Mills. WYG believe that this redevelopment should be promoted for mixed use development, including retailing, commercial and residential development. The site is well located to the existing train station and covers an area of approximately 0.9ha. However, the site is not very prominent and may not be considered suitable by major multiple retailers. In light of this, the site should be considered for a mixture of uses, of which retail development may be ancillary.
- 11.49 The second opportunity is located at the northern edge of the town centre and comprises a low storey depot building. The site is approximately 1.2ha in size and could provide small scale retail development. The site could provide convenience retailing in order to improve the convenience retail provision in Bingley. We believe that the introduction of an appropriately sized retail unit with associated parking would reinforce this area of the town centre.
- 11.50 Bingley is an important town centre within the Airedale corridor. However, its shopping role and function is restricted due to the close proximity of both Shipley and Keighley, which both have stronger shopping provision. WYG believe that the redevelopment of the Myrtle Walk shopping centre will help to improve the retail provision in Bingley which will further improve the town centre's vitality and viability. The town centre will benefit significantly from the proposed public realm and highways improvements. The introduction of improved retailing coupled with environmental improvements will help diversify the uses within the town centre, which will help draw people back to the town.

### **Ilkley Town Centre**

- 11.51 The evidence gathered as part of this assessment identifies Ilkley to be a strong retail destination both in terms of convenience and comparison retailing. In addition the centre has a strong service sector as a result of the town's strong tourist catchment. It is interesting to note that Ilkley's convenience draw is comparable to that found for Bradford City Centre. Based on the current convenience provision, WYG has identified that Ilkley has no quantitative need for new convenience provision in the short to medium term. We believe that the introduction of a Marks and Spencer foodhall to the town will provide further qualitative benefits and enhance choice and competition.
- 11.52 In terms of comparison goods floorspace, this study has found that there is limited need for new floorspace in the short to long term. Indeed, the study identifies that to 2022, if Ilkley is to maintain its market share, it needs to accommodate up to 2,340 sq. m (net) of new floorspace. This represents a 17% increase on the current level of comparison floorspace.

There are limited vacancies with Ilkley, which suggests that demand for space is healthy and strong, which is reflected in Ilkley's strong yields.

- 11.53 Given the historic nature and quality of the local built environment, WYG are unable to identify any suitable redevelopment sites to provide new major retail development either within or on the edge of the town centre.
- 11.54 WYG would advise the Council that no new retail expansion areas are required in the short to medium term.

### **Keighley Town Centre**

- 11.55 This study confirms that Keighley is a strong and important retail destination in the District. It is evident that behind Bradford, Keighley is the second strongest retail location in the District. The town benefits from strong convenience goods provision with the J Sainsburys and Wm Morrisons superstores. This is set to be strengthened further with the introduction of ASDA to the town. The town centre is the strongest convenience destination in the district. The town centre is also a strong comparison goods destination, second to Bradford.
- 11.56 It is clear from the results of the capacity exercise that a significant level of convenience goods expenditure is spent at the Wm Morrison (£106m). From closer inspection, 46% of the turnover is derived from the local area (Survey Zone 2). However, the catchment of the store is wide ranging, with 26% of the turnover being drawn from Survey Zone 2 which covers the Sutton Craven and Cross Hill. In addition 10% of its turnover is drawn from residents in Survey Zone 1 which covers Howarth and Oxenhope.
- 11.57 As a result of the overtrading, there is a under supply of convenience good floorspace in Keighley. On this basis there is capacity for a new superstore in Keighley in the short term. The introduction of a new superstore will meet this identified need but also increase competition and choice in the town. There is a clear quantitative and qualitative need to introduce a new superstore to the town. The permitted ASDA store and a number of smaller convenience goods developments will meet up to 44% of the identified capacity up to 2012. WYG would recommend that this capacity should be reviewed at 2012 (if implemented) to see whether more sustainable shopping patterns have been created from the introduction of ASDA. In addition, WYG would recommend that the Council monitor the future delivery of these planning commitments to 2012. Once stable convenience shopping patterns have been established for the new ASDA store then it would appropriate to review shopping patterns to evaluate its impact. In accordance with guidance in PPS6, it will then be appropriate to re-examine the need for convenience goods retailing. We believe that the new

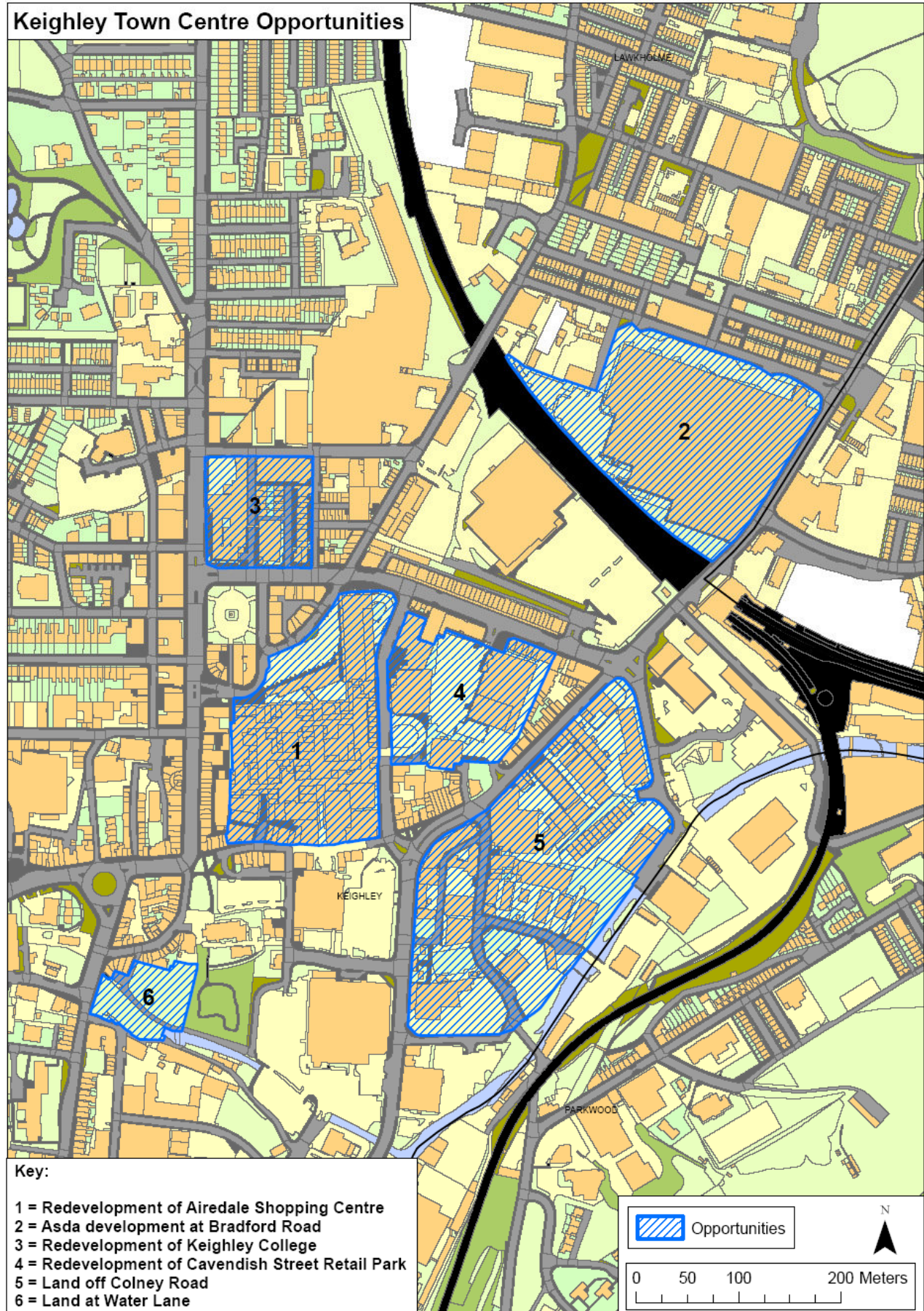
ASDA store will address the current deficiencies and improve the choice and range of convenience goods and improve competition in the convenience sector.

- 11.58 As the second largest comparison shopping destination in the District, there is significant scope for additional comparison goods floorspace within Keighley (76,329 sq. m net by 2022). It is important that the sequential approach is applied to this need and that a number of potential redevelopment opportunities within or on the edge of Keighley Town Centre are identified by the Council. The Council must be realistic about the future provision as some of the need could be met through the recycling of existing floorspace or through re-configuration of existing stock. As with most traditional town centres, Keighley is constrained by the existing built heritage which comprises small premises, which are not conducive to modern retailer operations. The Council should consider positive measures to deal with the smaller units making them more attractive to the retail market. The obvious solution would be for the recycling of such space with new more efficient space. We believe that there may be an opportunity to reconfigure and redevelopment the Airedale Shopping Centre (annotated as site 1) in the medium to long term.
- 11.59 WYG understand that Keighley's attraction to multiple retailers is somewhat limited by both Bradford and to some extent Leeds and Halifax. This may reduce the owner's ability to attract key operators to Keighley. If the current precinct can be redesigned to focus on providing larger units, then this may encourage multiple retailers to consider representation in Keighley. Given the central location of the Airedale Centre then this should be the focus of all redevelopment as first preference and in accordance with the sequential approach.
- 11.60 Another potential opportunity exists with the redevelopment of Cavendish Road Retail Park. The retail park is not fully let and may be available for redevelopment. The site (annotated as site 4) comprises an area of 1.7ha. The current site provides a number of large retail warehouse units within a central location, which is unusual. However, it is felt that the current configuration restricts the permeability of the town centre. It is difficult to gain access between Cavendish Road and Hanover Street due to the position of the Retail Park. WYG consider that both the Airedale Shopping Centre and Cavendish Road Retail Park together provide an excellent opportunity to provide a comprehensive redevelopment opportunity that would redefine the primary shopping area of Keighley. Any redevelopment could help improve the linkages between these two components of the town, which are currently divorced and difficult to navigate.
- 11.61 Outside the central shopping area, there are a number of other opportunities where new retail development could be pursued if more central locations are not realised. The first relates to the land between Worth Way and the River Worth to the east of the defined town centre (annotated as site 5). This area offers a logical expansion area to the current town centre.

The area covers 5.1ha. However, the scale of retail development would need to be sensitively controlled as it may impact on the vitality and viability of the rest of the town centre. WYG believe that the site should be promoted for mixed use development, which should focus on retail warehousing (bulky comparison goods), new leisure and commercial development. Although we have identified limited capacity for new leisure facilities such as cinema, WYG believe that there is a qualitative need to improve leisure provision within Keighley as a principle town in the region and district. This may include new hotels, replacement cinema, bingo, health and fitness or bowling facilities.

- 11.62 There will also be scope to provide economic development opportunities including commercial office or managed workspace. In addition there may be opportunities for new residential development to be located within this area, as it provides an attractive riverside corridor (subject to flooding). The introduction of commercial retail in this area will help to reinforce the role and function of the southern area of the city centre, which will focus new activity to the area around the markets. The introduction of major development in the locality may help to realise the highways improvements within this area, which link Worth Way to Griesley Road.

Figure 11.3: Keighley Town Centre Redevelopment Opportunities



- 11.63 Given the planned relocation of Keighley College to Old Dalton Lane, this will release prominent central site in the town centre. The current 1.1ha site (annotated as site 3) is located at a key junction at North Street and Cavendish Road. The site offers an opportunity for mixed use development, including ground floor retailing. Upper floors could be promoted for either new residential or commercial office uses. Both these uses will complement and improve the vitality and viability of the town centre and could provide active frontages in this locality, which would reinforce North Street as a key component of the town centre. Any redevelopment should seek to provide a mix of suitable sized ground floor outlets that will be flexible enough to respond to the retail and commercial market. This could provide a range of A1, A2, and A3 ground floor outlets.
- 11.64 The last site identified by WYG is land on Water Lane to the south of the town centre. The site covers 0.6ha (annotated as site 6). We believe that this site is suitable for a number of retail or commercial uses. The site's redevelopment will help reinforce the town centre from the southern gateway off Bridge Street. Any development on this site should seek to form pedestrian links with Church Street to help improve the permeability of the site and the pedestrian activity with the rest of the town centre. WYG consider that the site could be promoted for either small scale convenience or comparison floorspace.
- 11.65 In summary, WYG believe that there are number of opportunities available to Keighley Town Centre that could be pursued over the plan period. However, this may involve significant Council involvement and political support to realise some of these opportunities. The Council should seek to promote these more central sites through a cohesive planning strategy, which together will seek to enhance and improve the town centre rather than allowing out-of-centre retail floorspace.

### **Shipley Town Centre**

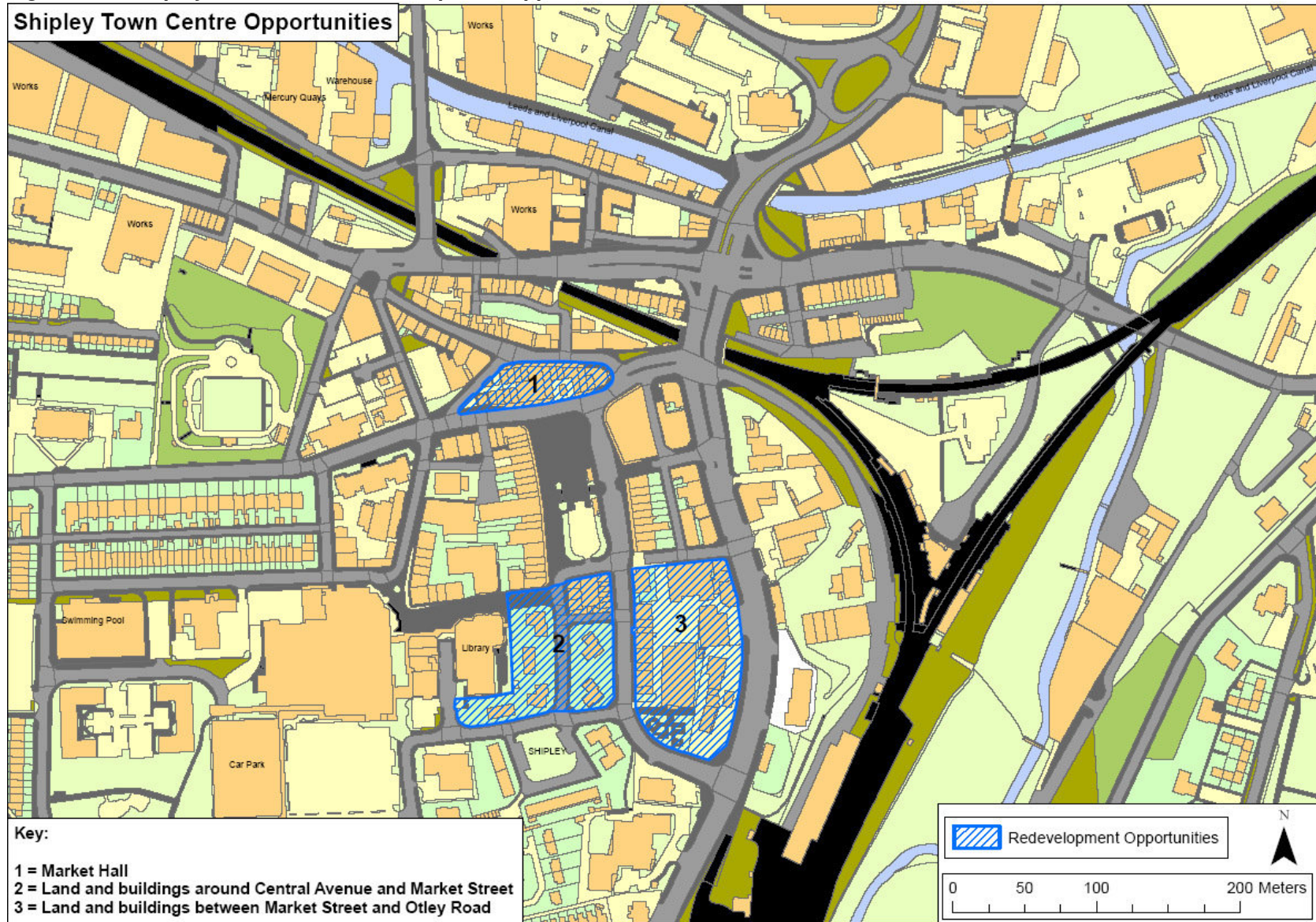
- 11.66 The evidence gathered as part of this study has identified Shipley to be a strong retail destination in the District. Shipley is the third strongest town centre, behind Bradford and Keighley, both in terms of its expenditure retention and the scale of retail floorspace. However, it should be noted that Shipley is smaller in scale than two district centres (Five Lane Ends and Giringon). However, this is only due to the size of the two superstores at these two centres.
- 11.67 From examination of the capacity exercise, the high expenditure of the town centre is due to the popularity of the purpose built ASDA superstore. The results found that the level of convenience expenditure spent at the ASDA store was £44.7m. The results have found that there is a quantitative and qualitative need for new convenience floorspace in the town centre based on existing market share being retained.

- 11.68 Whilst it is clear that the ASDA is a key attraction for Shipley, WYG believe that it has a number of negative impacts on the town centre. While it attracts a significant number of people to the town centre, there is a danger that visitors undertake limited linked trips to other facilities in the town centre. We also believe that there is a lack of choice in Shipley and that the Council should seek to improve competition within the town by encouraging a new food operator to locate in the town. Notwithstanding this identified need for new convenience floorspace in Shipley, from review of the current built environment, the town centre is physically constrained and there are no obvious sites that could be considered acceptable.
- 11.69 The study has identified modest scope for additional comparison goods floorspace within Shipley Town Centre (11,400 sq. m up to 2022). However, this is based on the current limited market share (2.6%) of the town centre. WYG believe that in accordance with the Airedale Valley masterplan, the Council should be looking to alleviate the position of Shipley as a key shopping destination in the 'Places for Change' strategy. With Shipley located in the eastern area of the Airedale Valley, it should be considered as the key gateway town to the rest of the Valley.
- 11.70 Unfortunately the town centre's past performance has been restricted by the proximity of Bradford City Centre to the south and Leeds to the east. These regional and sub-regional centres clearly restrict the potential of Shipley as a retail destination, especially for comparison goods retailing. Notwithstanding, these limitations, there is scope to improve the role and function of the town centre as a comparison retailing destination.
- 11.71 WYG has explored a number of opportunities within the town centre, to see whether there are any potential sites that could meet the identified capacity. We have identified a number of potential redevelopment opportunities within the central shopping area which if developed could have a positive impact upon the town centre's vitality and viability. However, from review of much of the current retail stock in the town centre, we believe that most of the identified capacity could be accommodated through the recycling of existing poor quality floorspace or through a reconfiguration. For example we have found that the current market hall site, although has some iconic status with the town centre residents, the current configuration and shopping environment is extremely poor and would benefit from comprehensive redevelopment. The site; however, is constrained in terms of its topography, which may limit its future regeneration. The site provides a unique opportunity to provide a mixed used development, which could provide ground floor retail units with either residential or commercial office floorspace on the upper floors. The site covers approximately 0.3ha but could provide between 1,500 and 2,000 sq. m of new ground floor retail space. Any proposals should seek to improve the local built environment in this locale; however, it should be of an appropriate scale that complements the existing human scale of the town centre.



- 11.72 The current town centre is poorly signposted from the main arterial roads, which run through the town. We believe that increased signage and promotion of the town centre would help to improve the centres signage.
- 11.73 WYG believe that there may be an opportunity to improve and enhance the market square as a key focus for the town centre. The area should be expanded and improved to provide a level market square which can be used as both a surface level market area, but on non market days can be used for short stay town centre car parking. Visitors are currently drawn to the large multi storey car park which is located off Iver Way to the rear of the large ASDA store. The poor connection is limiting visitors to the market square area, which in turn is impacting adversely on the vitality and viability of market square. WYG believe that the reintroduction of car parking in the market square will increase vitality significantly. This will help footfall and activity in the market square which will have beneficial impacts for the central area of the town centre.
- 11.74 The town centre offers limited opportunities for new retail development without extensive and comprehensive redevelopment options being considered. Whilst we believe that the indoor market hall building can provide some qualitative benefits if redeveloped. WYG has identified two alternative development options that could provide comprehensive redevelopment opportunities. However, these opportunities may require significant public sector intervention as there is likely to be a number of land ownership issues that may require compulsory purchase input to resolve.
- 11.75 The first site comprises 0.9ha of land between Otley Road and Market Street. The site offers a gateway position to the town from the southern approaches. The site comprises a number of different land uses including retail, leisure and a car showroom. Many of the properties appear underused or vacant and do not create a welcoming approach to the town centre. The site; however, is not flat and has some topographical constraints that would need to be addressed if a suitable retail proposal was to be presented. We believe that the site could accommodate a new superstore/foodstore which could deliver the quantitative and qualitative need identified in the study. If such a development was to be facilitated then careful consideration would need to be had to creating a strong relationship with the rest of the town centre and more specifically Market Square. We believe that the development of this area would interact with Market Square and help to create a vital shopping environment that would act as a counterbalance with the ASDA which would be beneficial to the rest of the town centre.

Figure 11.4: Shipley Town Centre Redevelopment Opportunities



- 11.76 The second site relates to the five residential blocks that are located around the Central Avenue, Well Croft and Market Street. WYG would also suggest that the Arndale Shopping Centre located off Market Street could be amalgamated with this site. The combined site covers an area of 0.7ha. We believe that this area could represent a logical extension of the existing town centre to the south. This area could provide either new convenience or comparison retailing space. However, WYG believe that this site should be given less priority than the Otley Road site as it does not benefit from the visual presence that would be attractive to future retailers. The site should be considered for development in the medium term (2012 and beyond) and subject to whether redevelopment happens on the Otley Road site.
- 11.77 In summary, we believe that there is significant scope for Shipley to enhance its current position and the Council should seek to secure a new major superstore within the town centre which will help to enhance the centres market share and reduce the dominance of the ASDA store. There is also scope to provide new comparison goods retailing in the centre. This would be provided in the form of recycling of the poor existing stock in key locations or could be developed as part of future expansion of the town centre to the south.

### **Town Centre Management**

- 11.78 In order for the district to provide a vibrant and vital network of town and district centres, it is not just important to provide new retail development over the plan period but it is also important to manage the existing centres successfully. The district already benefits from a town centre management (TCM) programme, which covers Bradford City Centre, Bingley Town Centre, Shipley Town Centre and Keighley Town Centre. The programme should be expanded to include Ilkley and other district centres where possible.
- 11.79 The current town centre management (TCM) provides an important role to the successful management of the existing town centre and this should be retained over the next plan period. The TCM can help facilitate the strategic direction of the town centres. The TCM allows a pro-active approach to be taken forward which can help to organise events, resolve day to day issues, provide business support, training guidance etc. The TCM allows a holistic and sustainable approach to be provided to ensure that each town centre is considered a successful shopping destination. The TCM ensures that a support interface between the Council and the local business community is present. The interface should be a two way process, whereby local businesses should also support a pro-active partnership approach with the Council in order to improve and enhance the town centres.

## Conclusion

- 11.80 Given the identified need in this study, WYG recommend that the Council take positive actions to enhance the shopping 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.
- 11.81 In terms of convenience shopping there is a quantitative need to provide a new foodstore in Bradford City Centre, through enhancing it's current poor market share, which will also seek to address the qualitative deficiency in the city centre. In addition, we believe there is quantitative and qualitative need to improve the convenience provision in Shipley Town Centre. In terms of Keighley, WYG believe that the proposed new ASDA store will meet the clear quantitative need identified in the town. We believe that if three new superstores/supermarkets can be implemented in these three centres up to 2012, this would satisfy the district's quantitative need in the short term (up to 2012). Subject to the successful delivery of this we would recommend that the Council review and monitor this over the next 5 years.
- 11.82 In terms of comparison shopping, WYG believe that there is capacity to enhance the position of Bradford City Centre through the implementation of major retail development. WYG believe that the delivery of the Broadway will be fundamental and will help transform Bradford as a shopping destination and will address its 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 expansion of the existing town centres. However, this expansion will need to be carefully monitored and delivered through appropriately scaled development.
- 11.83 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 which will then help encourage other comparison retailers to the centre. At the same time the Council should seek to maintain the centres strong service role.
- 11.84 In terms of leisure development, although the study has found limited capacity for new leisure provision in quantitative term, 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. However, 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. This should include improving the quality and range of restaurants, bars, public houses and evening entertainment uses.

## 12 FUTURE STRATEGY FOR DISTRICT CENTRES

12.01 PSS6 at Annex A defines district centres as usually comprising:

**‘...groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library’.**

12.02 The Bradford UDP defines seven district centres. These are:

- Five Lane Ends;
- Girlington;
- Great Horton Road;
- Greengates;
- Mayo Avenue;
- Thornbury; and
- Tong Street.

12.03 In respect of district centres, the Bradford UDP (paragraph 7.56) states that:

**‘The purpose of the district centres is to provide retail and leisure facilities that complement but not significantly compete with the City Centre, to enable people to meet their day to day needs and minimise their need to travel. Policies in the retail section aim to provide for a strong convenience goods offer by safeguarding and where appropriate allowing for the enhancement of food superstores and supermarkets in these centres. They do not however provide for any significant comparison retail developments to take place, in order to focus such development to the City Centre. Likewise policies in the leisure and entertainment section allow for limited leisure development in the District Centres where it is of a scale and nature that will only attract custom from the part of Bradford the centre is meant to serve. Other non retail uses are encouraged in the District Centres to consolidate the centres...’**

12.04 WYG’s advice towards each of the centres, which are informed by the vitality and viability assessments contained at **Appendix 7**, is laid out below.

### **Five Lane Ends**

12.05 Five Lane Ends is predominately a destination for convenience and comparison goods, containing a large Morrisons foodstore in addition to a range of different sized comparison retailers. Whilst it is certainly performing a role as a district centre in the local shopping hierarchy, it would benefit from having a greater range of service uses and public facilities. It currently contains a number of places of worship, in addition to an Abbey Bank, a Post Office and a range of leisure and retail services, although a wider range of restaurants and public

facilities would support the role of this centre and provide added choice. New leisure facilities should be supported, provided that they are of an appropriate scale.

- 12.06 WYG consider the boundaries of Five Lane Ends to adequately reflect the parameters of the centre, and therefore propose no changes in this regard. However, as the vitality and viability assessment notes, the Council should encourage stronger links between different parts of the centre.

### **Girlington**

- 12.07 Girlington is a strong district centre containing a wide array of convenience, comparison and service traders of different sizes. It is located at an important intersection of Thornton Road (the B6145) and Ingleby Road (the A6177). Retailers present include Morrisons, Big W, Peacocks, HSBC, Lidl and Pride Asia. Notwithstanding this, the centre does lack public facilities. Given the busy nature of the area in terms of private vehicles and bus routes, and with the most popular method of reaching the centre revealed by the in-street survey to be on foot, such facilities in this locality would be easily accessible to a wide range of residents by a choice of means of transport.

- 12.08 In terms of the boundaries of the district centre, there is scope for this to be extended to incorporate the vacant former Morrisons office building on Thornton Road (Hilmore House). Given that the proportion of vacant floorspace in the centre is below the national average, despite the proportion of vacant outlets being above it, there appears to be strong demand for larger retail outlets in this locality. Indeed, it is notable that there have been a number of recent retail developments in the centre, together with the new build Subway development and a new build retail outlet on Thornton Road which was under construction at the time of the Study. Consequently, if this site were designated for retail purposes it would allow expansion of the district centre. This site may be suitable for a new large-format convenience foodstore. Other than this, WYG propose no changes to the boundary of Girlington.

### **Great Horton Road**

- 12.09 This centre is somewhat unique in the Bradford retail hierarchy as it is the only district centre not to contain a retail park. It is linear in form and extends along Great Horton Road. It contains few national multiples and is dominated by independent traders. The service offer of the centre is strong although it offers more limited convenience provision, occupying a role mainly in the provision of top-up goods only. The comparison sector is adequate, but greater expansion of this role would benefit the centre.

- 12.10 It is notable that just outside the district centre boundary is a large Tesco Extra store. The Tesco effectively functions as part of the existing district centre. It is notable that the national policy guidance indicates that a district centre should contain at least one supermarket or superstore. WYG note that the district centre also contains the Al-Halal supermarket but this performs a more specialised shopping role compared to the Tesco. However, WYG would advise that the Council should consider excluding the Tesco from the district centre boundary would allow the Council to maintain an element of control over the expansion of the Tesco store. If the store is located outside defined centre and as such is considered to be edge of centre by definition and will therefore be subject to the criteria tests of PPS6.
- 12.11 The Council should note that there is potential to expand the district centre boundaries to include the industrial area between Ward Street, Great Horton Road, Southfield Lane and Beldon Road. This is currently in use, although if it were to come forward in the future retail use may be most appropriate and it would form a natural extension of the centre and allow more modern outlets to be provided.

### **Greengates**

- 12.12 Greengates was considered to be a healthy centre in the vitality and viability assessment. Retail provision is dominated by national multiples including Sainsburys, Homebase, Netto, NatWest and Matalan. It contains an array of retail and leisure service uses, including a number of restaurants and public houses.
- 12.13 WYG advise that the boundary of the district centre is extended to the north-east along New Line Road in order to incorporate the New Line Retail Park. This small retail park is a recent development and forms a natural extension to the centre. This is the only amendment WYG propose to the boundary of Greengates District Centre.

### **Mayo Avenue**

- 12.14 WYG recommend that Mayo Avenue is delisted from district centre status and viewed as a freestanding out of centre destination. It contains representation from only a Morrisons store, an associated petrol filling station and a Matalan, and lacks the necessary range of uses to be considered as a district centre or even a local centre. It does not offer a range of goods and services, and given that the centre is surrounded by residential properties and bounded by Mayo Avenue itself, there is no scope for it to expand in the future in order to provide additional retail and service floorspace.

## **Thornbury**

- 12.15 Thornbury District Centre is relatively small containing a total of seventeen retail outlets. The comparison and convenience offer of the centre is good, with traders including Morrisons, B&Q, Netto, Iceland, Carpet Right and Au Naturale Interiors amongst others. The service offer of the centre is more limited, and the Council should be supportive of proposals that seek to expand provision in this sector. There are no public services in the centre.
- 12.16 WYG note that there is a large vacant site to the west of the district centre boundary at the junction of Ruston Avenue and Leeds Old Road. Adjacent to this site is 'The Thornbury Centre', which is a public facility and conference centre and an appropriate district centre use. As such, the district centre boundary could be extended to incorporate this area. However, the Council may consider the site more appropriate for other uses, possibly residential uses, in which case it would not be appropriate to include this site in the district centre. Additionally, there is an existing large vacant outlet in the centre, and this should be the focus for new retail development in the centre in the first instance.

## **Tong Street**

- 12.17 The vitality and viability assessment for Tong Street noted that it is experiencing difficulties with respect to its health, with a poor quality environment and high proportion of vacancies. It does contain some key traders, including a Gala Bingo, a Netto, an Iceland and a Superdrug. Although convenience and comparison provision is adequate, the centre would benefit from greater provision in the financial and business service sector and the retail service sector. No restaurants are located in the centre, although it does have a number of hot food take-away outlets.
- 12.18 Tong Street should be maintained as a district centre given the important role it plays in local retail provision and the strategic nature of its position, however regeneration of the area should be actively encouraged by the Council. The Avenue Retail Park is due to be redeveloped, which would benefit the health of the centre.
- 12.19 WYG note that the retail stock in Tong Street comprises mainly older properties, although some modern outlets have recently been constructed along Tong Street. There is scope to include the unused area of land between Lister Street and Weaverthorpe Road in the district centre boundary in order to provide additional space for retail development. Furthermore some of the best quality retail outlets along Tong Street are actually located outside of the district centre boundary despite their close proximity to the centre. These should be included in the boundary. As such, WYG recommend that the boundary of Tong Street be extended to include numbers 329 to 357 Tong Street.



12.20 A large industrial area, Anchor Works, is located to the north of Tong Street. Although currently in use, if this site were to become vacant in the future it may be appropriate for redevelopment including retail uses. Any retail development would be subject to demonstrating need (or capacity). Given its size of the site a mixture of uses including, potentially employment, retail, leisure or residential uses could be promoted.

### **Conclusion**

12.21 In conclusion, WYG consider the following centres to be adequately performing the role of a district centre, and require no action by the Council other than minor boundary changes where appropriate:

- Five Lane Ends;
- Girlington;
- Great Horton Road;
- Greengates; and
- Thornbury.

12.22 WYG recommend that the following district centre becomes a priority for regeneration and investment in order to support its role:

- Tong Street.

12.23 Given the lack of diversity of uses, WYG advise that the following centre is delisted as a district centre, and is unallocated in future planning documents:

- Mayo Avenue.

12.24 It should be highlighted that this assessment considers existing district centre designations only. It may be that there are retail areas that are functioning as district centre and should be designated as such, although it is not the aim of this Study to recommend promotions to district centre status.

## 13 FUTURE STRATEGY FOR LOCAL CENTRES

13.01 This section examines the 40 local centres defined in the Bradford UDP, and explores the function and role of each one, in addition to advising on the approach that the Council should adopted towards each centre in the future. A more detailed vitality and viability assessment for each local centre is found in this report at **Appendix 8**. This Section begins by discussing the policy approach advocated towards local centres at a national and local centre, before proceeding to an analysis on a centre-by-centre basis.

### **Policy Background**

13.02 In order to deliver the Government's objectives towards town, district and local centres, paragraph 2.1 of PPS6 notes that development should be focused in existing centres in order to strengthen and, where appropriate, regenerate them.

13.03 Furthermore, PPS6 states that at a local level, authorities should plan carefully how best to distribute any identified growth to achieve the objectives of their spatial strategies. In defining their objectives, local planning authorities should consider whether there is a need to rebalance the network of centres to ensure that it is not overly dominated by the largest centres, that there is a more even distribution of town centre uses, and that people's everyday needs are met at the local level. In considering the development of the network and hierarchy, local planning authorities should consider (paragraph 2.9):

- **'Whether there is a need to avoid an over-concentration of growth in the higher level centres;**
- **The need for investment and growth to strengthen other centres, especially those needing regeneration; and**
- **The need to address deficiencies in the network by promoting centres to function at a higher level in the hierarchy or designating new centres'.**

13.04 Furthermore, paragraph 2.10 of PPS6 states that: **'...local planning authorities should recognise that networks and hierarchies are dynamic, and will change over time, but any significant change in role and functions of centres, upward or downward, should come through the development plan process, rather than through planning applications.'**

13.05 Local Centres are an important part of the shopping provision within any authority area as they complement the retail, leisure and service provision in larger centres within the District. PPS6 (paragraph 2.15) recognises the importance of local centres and states that: **'...local planning authorities should, through the core strategy development plan document,**

**set out a spatial vision and strategy for the network and hierarchy of centres, including local centres, within their area, setting out how the role of different centres will contribute to the overall spatial vision for their area.’** (Our emphasis).

13.06 In terms of local centres, PPS6 states (paragraph 2.55) that: **‘a network of local centres in an authority’s area is essential to provide easily accessible shopping to meet people’s day-to-day needs and should be the focus for investment in more accessible local services, such as health centres and other small scale community facilities. The mix of uses in local centres should be carefully managed.’**

13.07 In this respect, PPS6 highlights that deprived areas often have poor access to local shops and services. To tackle this problem local authorities should work with the local community and retailers to identify opportunities to remedy any deficiencies in local provision. Paragraph 2.56 states that: **‘this is likely to be best achieved through strengthening existing centres or, where appropriate, proposing new local centres.’** Moreover, PPS6 highlights that whilst larger centres have been the focus for much development and investment, local authorities should consider whether a more balanced network of centres should be developed within their area. In particular, they should strengthen local centres by seeking to ensure that there is a range of facilities in local centres, consistent with the scale and function of the centre, to meet people’s day-to-day needs, particularly in deprived areas.

13.08 Given this, paragraph 2.58 of PPS6 advises that:

**‘Local authorities should, where appropriate, seek to protect existing facilities which provide for people’s day-to-day needs and seek to remedy deficiencies in local shopping and other facilities to help address social exclusion.’**

13.09 On this basis, local planning authorities should utilise development plan documents or where appropriate local strategies in order to take a positive approach to strengthening local centres and planning for local shops and services by working with stakeholders, including the private sector and the community. This should include:

- Assessing where deficiencies exist in the provision of local convenience shopping and other facilities which serve people’s day-to-day needs and identifying opportunities to remedy and deficiencies in provision;
- Involving the local community and retailers; and
- Working with the private sector to seek to ensure that the identified need for new facilities will be delivered.

13.10 Furthermore, PPS6 describes the characteristics of different types of retail development within Annex A, including town, district and local centres. With regard to local centres these are defined within Annex A of PPS6 as:

**‘A range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and laundrette. In rural areas, large villages may perform the role of a local centre.’**

13.11 Furthermore, at the footnote to Table 1 of Annex A, it is also highlighted that: ‘small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement.’

13.12 The Bradford UDP seeks to safeguard local centres and ensure their enhancement in line with PPS6. It notes that although the size and range of facilities vary between local centres, they all provide a focus for the provision of local needs. The UDP states at paragraph 7.58 that:

**‘The boundaries of the centres were defined to include the following uses: shops; financial and professional services such as banks, building societies, veterinary services and estate agencies; cafes, restaurants and take-aways; medical centres, doctors surgeries; libraries, community centres/halls, places of worship; and any type of use which was primarily frequented by the people within the area it served, where they formed a compact group.’**

13.13 The UDP also acknowledges that there are other areas within urban areas and villages in the Bradford District that contain groups of shops but are not defined as local centres. This is because they either do not accord with the criteria in PPS6, due to a lack of size or other facilities, or because the centre cannot be clearly defined as retail uses do not form a group, instead being situated amongst residential uses.

#### **Addingham Local Centre**

13.14 This local centre is situated in the village of Addingham and clearly services an important role to residents. Although it lacks a small supermarket, it does contain a Post Office, a pharmacy and a newsagent in addition to a range of other convenience, comparison and service retailers. It should be noted that a number of residential properties are now located within the local centre boundary and WYG would advise tightening the boundary to the west of the

centre to exclude the Burnside residential development together with 68 Main Street and 70 Main Street.

### **Allerton Local Centre**

- 13.15 Allerton is an important centre in the local hierarchy, and provides a range of goods and services to local residents, including a Co-op, Post Office and pharmacy. However, the quality of many of the outlets in the centre is poor and vacancies are high the centre shows signs of struggling in retail terms. Strengthening of this centre would be beneficial, and a redevelopment of all or part of the Allerton Shopping Centre should be considered.
- 13.16 There are a number of additional retail outlets located along Allerton Road outside the local centre boundary to the south-east, although as these do feel detached from the centre we do not recommend altering the current local centre boundary. In future, applications for retail uses in these localities should be directed towards vacant outlets located within the defined local centre in the first instance.
- 13.17 There are a number of large derelict sites adjacent to the centre which could be redeveloped for retail, residential or employment uses in the future. These include the vacant 'Seabrook Potato Crisps' warehouse outlet on Allerton Road and land to the rear of the Wilco Motosave outlet. At the current time, WYG do not suggest altering the local centre boundaries to include these sites, although they do have potential in the future and could be considered through the LDF process.

### **Baildon Local Centre**

- 13.18 Baildon is a healthy local centre offering a wide array of comparison, convenience and service uses. Baildon is a strong centre which is performing well and is performing a local centre role in accordance with PPS6. Consequently, WYG recommend that no changes are made to the boundary of this centre.

### **Bankfoot (Manchester Road) Local Centre**

- 13.19 This local centre contains a Post Office, a pharmacy and a newsagent although it does not contain a small supermarket. It contains a number of other retail services and comparison traders, although WYG consider the retail offer to be somewhat limited. Furthermore the busy nature of Manchester Road does form a significant barrier severing the two parts of the centre. There are; however, pedestrian crossings present. Given the lack of provision in the locality this centre should be retained with the boundary unchanged, but a greater range of retail uses should be encouraged.

- 13.20 The centre contains a number of vacant outlets, including one particularly large vacant outlet at 847 to 859 Manchester Road. This site could be extended to include adjacent areas of derelict land to provide a large site for retail or residential redevelopment.

#### **Barkerend Road Local Centre**

- 13.21 This centre contains all the recommended constituent parts of a local centre as stated by national guidance PPS6, with a pharmacy, a Lidl supermarket, a Post Office and a newsagent together with a range of other retail uses. WYG consider the local centre boundary to reflect the extent of the centre and propose no amendments.

#### **Bolton Junction Local Centre**

- 13.22 Bolton Junction contains a number of important uses for local residents, including a Co-op store, a branch of HSBC and a number of fast food and take-away outlets. However, it contains a limited number of other retail, leisure or service uses. Crucially it does not contain a newsagent, a Post Office or a pharmacy. In addition, the local centre contains two large vacant outlets, the former Kents fitness outlet on Bolton Road and the former QLM store on Idle Road.

- 13.23 The centre is not currently functioning as an effective local centre, and although it does contain a number of retail facilities the Council should consider its status as a local centre. From examination of the Local Centre and 500m Buffer Map produced by WYG and contained at Section 9, it is clear that the catchment of this centre overlaps that of two other local centres (Eccleshill and Oak Lane, Manningham) and thus the area is considered to be well provided for by retail facilities. A delisting of this centre would not change its current retail uses, but would allow a managed decline of the centre to take place with new proposed retail uses directed to other local centres nearby. In this scenario, the two large vacant outlets could be redeveloped for residential purposes.

- 13.24 If the Council do not wish to see the centre delisted, then new retail uses in the area should be strongly encouraged. This could be supported by redevelopment of the two large vacant outlets in the centre to provide more modern, smaller-scale accommodation for potential traders.

#### **Burley-in-Wharfedale Local Centre**

- 13.25 This local centre is situated some distance from other retail facilities and is located within a relatively remote part of the District. It serves the population of Burley-in-Wharfedale village, and is a strong centre with a wide variety of retail, leisure and service uses with only one

vacant retail outlet. Since the boundaries of the centre were defined, a community centre associated with St Mary's Parish Church has been developed adjacent to the Post Office on Station Road. Given the civic nature of this facility it should be included within the local centre boundary. WYG does not propose any other changes to the boundary of this local centre.

### **Buttershaw Local Centre**

13.26 Buttershaw Local Centre is relatively small, containing just twelve retail outlets in total. It is dominated by a large-format Tesco store, although it also contains a Post Office and a number of take-away outlets amongst other uses. It does not contain either a newsagent or a pharmacy, although these facilities are available in the Tesco store.

13.27 This centre serves an important role in providing predominately convenience shopping facilities for local residents. However, WYG do not consider it to have the necessary attributes of a local centre. Indeed, the Bradford UDP indicates that local centres should occupy a role in the provision of services to the local population, rather than a larger catchment area (Paragraph 7.101). Local centres are expected to provide facilities for residents living within a 500m catchment area only. A facility the size of the Tesco store draws from a considerably larger area than the 500m threshold, and statistical analysis of the Bradford household Survey results (**Appendix 2**) indicates that this store attracts nearly 2% of all convenience goods expenditure generated by residents of the Study Area. As such, WYG do not consider it to be of the appropriate scale of a local centre and would recommend the centre be downgraded or delisted.

### **Carlisle Road/Whetley Hill Local Centre**

13.28 This local centre contains a good range of retail and service uses, in addition to several civic uses, although it does not contain either a small supermarket or a Post Office. Notwithstanding this, a number of small convenience stores are present and it functions effectively as a local centre and therefore should still be considered as such.

13.29 The centre is lineated and covers an area of approximately 0.75 km; the Council should consider whether the centre should be consolidated to a smaller geographical area, possibly focusing on the area of Carlisle Road to the east of Century Place. This would provide greater focus for the centre, which effectively functions as two separate entities at the current time. In addition, residential development is proposed at the western end of the centre, subsequently the boundaries could be adjusted to exclude the properties on the Whetley Hill/Carlisle Road junction, which are currently of extremely poor quality and vacant, and could be considered for residential redevelopment.

- 13.30 WYG recommend that the boundary is adjusted in light of the comments above. In addition, the garage outlet adjacent to The Marlboro is an appropriate local centre use and the boundary of Carlisle Road/Whetley Hill should be amended to include this outlet.

### **Clayton Local Centre**

- 13.31 Clayton Local Centre serves the village of Clayton and is dominated by service uses including estate agents, health and beauty services and public houses. It is significant to note that the local centre does not contain any of the suggested retail outlets which should be present in a local centre as advocated by PPS6, namely a newsagent, a small supermarket, a Post Office or a pharmacy. However a Co-op supermarket does exist adjacent to the northern boundary of the centre and it is recommended that the boundary of Clayton Local Centre be extended to include this outlet which was built since the boundaries were last reviewed. Given the isolated nature of Clayton compared to other local centres in the District, WYG recommend that it remains designated as a local centre.
- 13.32 The Co-op formerly occupied a retail outlet on School Street which has now been sub-divided for the sale a variety of comparison goods. The focus of the centre has shifted and footfall in along School Street is relatively low making it feel detached from the rest of the centre. The Council should consider whether this part of the centre should be promoted for residential uses and adjust the boundaries accordingly. This would ensure that new retail uses are located in a tighter geographical area around Green End/Thornton Lane to provide a more coherent local centre.

### **Cross Road (Keighley) Local Centre**

- 13.33 This local centre offers a range of retail and leisure services, despite its relatively small size. It contains a number of convenience retailers and a newsagent, although there is no Post Office, pharmacy or small supermarket. The retailers which are present appear to be trading well and there are no vacant outlets. Furthermore, a Post Office is located approximately 100m to the north of the centre on Halifax Road. WYG believe that retail in this locality should be encouraged, and thus protected, despite the lack of provision highlighted in several key retail areas. The local centre designation should remain in order to try and encourage such uses to locate in this centre. The centre should be monitored; however, and if a significant decline in the retail outlets trading is observed delisting should be considered.
- 13.34 Despite the presence of a Post Office nearby, it is considered too far away to be reasonably deemed as part of the centre, and as such WYG propose no changes to the boundary of this centre.



### **Crossflats Local Centre**

- 13.35 Crossflats is a small, focused local centre concentrated in a tight geographical area. It contains a Post Office and a newsagent, although neither a pharmacy nor a small supermarket is present. Other uses include a number of take-away outlets and several hairdressers. From examination of the Local centres and 500m Buffers map produced by WYG, Crossflats is some distance away from other local centres in Bradford District, and in light of this WYG recommend that it should remain designated as a local centre. It is clearly an important retail destination for local residents of the Crossflats area, but would be improved if a wider range of goods and services could be provided. There is a relatively large area of wasteland adjacent to the Post Office outlet which could be used for future retail development in the centre. This site is within the current boundary of the local centre.
- 13.36 A Tesco Express is situated a little under 500m to the north-west of the centre, and the presence of this outlet may prevent a small supermarket locating in Crossflats Local Centre in the future. This store may also take trade away from existing retailers in Crossflats Local Centre, and this should be monitored and, if deemed necessary, the decline of this local centre should be managed. The Council should consider whether this location would be appropriate as a more local, neighbourhood shopping parade, although given the lack of provision in the area a local centre here is be beneficial in the interests of social inclusion.
- 13.37 At the current time, WYG recommend that the boundary to the south-east of the centre be extended to incorporate numbers 5- 8 Canal Road, which are all in use as retail outlets, whilst removing numbers 1- 4 Canal Road which are all used for residential purposes.

### **Denholme Local Centre**

- 13.38 This local centre is situated in a relatively remote location some distance from other existing local centres. It appears to be performing well at the current time and contains a Co-op, a pharmacy, a Post Office and a Premier newsagent in addition to a number of other uses. This serves as an important shopping centre for the population of Denholme, and WYG recommend that no amendments are made to the boundary or designation as a local centre.

### **Duckworth Lane Local Centre**

- 13.39 Duckworth Lane is a strong centre with good provision of retail and leisure uses. It contains all the required outlets for a local centre as stated in PPS6 in addition to a range of other important facilities. In particular it has a notable concentration of Asian businesses, including jewellers and clothing stores. A number of further retail uses are located outside of the shopping centre boundary to the east of the centre, including a vacant garage site which

could expand the provision of retail uses. However, in order to ensure the centre remains focused and well-connected WYG do not recommend any alterations to existing boundaries. If expansion is required in the future, then this could be achieved by extending the boundaries of the centre to the east to incorporate outlets on Lilycroft Road and Toller Lane.

### **Eccleshill Local Centre**

13.40 Eccleshill appears to be a struggling local centre, it contains a large proportion of vacancies despite occupying an important geographical position in the Bradford retail hierarchy. A Post Office was once located in the centre but has since closed. The centre contain two convenience stores (including a Spar), a pharmacy and a number of service uses, including fast-food and take-away outlets. The Church and Church Hall situated on Stony Lane appear to be vacant.

13.41 Given the centres location and the role the centres plays in providing retail and service facilities to residents of the surrounding area, the Council should seek to support the development of new retail stores and services in this locality in the interests of social exclusion and access to facilities. WYG propose no alterations to the boundary of the centre. If the Church and Church Hall are indeed vacant, this could deliver a large tract of land within the centre to facilitate new retail outlets to support the role of the centre.

### **Eldwick Local Centre**

13.42 Eldwick is another local centre that is relatively isolated from other retail centres in the District. Given the lack of provision within it WYG recommend that it is downgraded from local centre designation. The centre contains just seven retail outlets of which two are vacant. Outlets in active use comprise a Post Office, an off licence, a hairdresser, a social club and a home interiors outlet, and therefore Eldwick does not contain the necessary diversity of uses to be considered as a local centre. Despite, there being no other local centres in the vicinity.

13.43 This local centre is located on the outskirts of the Bingley conurbation and footfall and passing road traffic is minimal. There is potential to turn vacant retail outlets here into residential properties, given that the surrounding area has experienced housing development. It is not fulfilling the role of a local centre, and WYG believe that most retailers will consider this locality to be unviable in economic terms. Consequently, the long-term future of Eldwick as a local centre is unsustainable.

### **Fell Lane/Oakworth (Keighley) Local Centre**

- 13.44 Fell Lane/Oakworth Centre is the only local centre designated in the UDP that falls within the Keighley conurbation. It contains a Post Office but lacks other types of provision, including a pharmacy, newsagent and convenience store. Notwithstanding this, it does contain a butchers and a bakery in addition to fast-food and take-away outlets, a dry cleaners and a gym amongst other traders. Consequently, WYG believe that the local centre designation should remain and the development of further retail outlets in this location encouraged to supplement existing provision. WYG propose no alterations to the local centre boundary.

### **Frizinghall Local Centre**

- 13.45 Frizinghall functions effectively as a local centre and contains a wide array of facilities. In addition to the facilities recommended by PSS6 for a local centre, it contains a number of fast-food and take-away outlets and a Doctors Surgery. WYG advise that no amendments are made to Frizinghall Local Centre.

### **Haworth (Main Street) Local Centre**

- 13.46 This local centre is somewhat unique in the local centre hierarchy in Bradford in that it performs a strong tourist role as well as providing goods and services to the local population. Indeed Haworth (Main Street) is an historic centre and many of the facilities that it contains are niche retailers directed toward tourists, in addition to a high proportion of bed and breakfast outlets. Haworth (Main Street) contains a large proportion of comparison retailers, no pharmacy is present nor is a small supermarket, although it does contain a convenience store and a Post Office.
- 13.47 Retail uses in this location should be encouraged and it is clearly a strong centre with very few vacancies and good quality outlets, although it lacks some essential facilities which would be expected of a local centre given that most retail and service outlets are directed toward tourists and visitors. WYG would recommend expanding the defined local centre boundary to include numbers 4-14 Main Street, many of which are currently in use as bed and breakfast outlets, in order to provide potential outlets for retail use. The Council should be supportive of new convenience facilities in Haworth (Main Street).

### **Haworth (Mill-Hey) Local Centre**

- 13.48 Within close proximity to Haworth (Main Street) is Haworth (Mill Hey), which incorporates outlets in and around Haworth Steam Train Station. In contrast to Haworth (Main Street), Haworth (Mill Hey) is primarily aimed at local residents rather than tourists, and contains a

good variety of retailers including a pharmacy, a Post Office, a Spar and a newsagent. This centre appears to be functioning well and adequately meets the needs of the local population. WYG propose no changes to the boundary of this centre.

### **Holmewood (Junction of Broadstones Way) Local Centre**

13.49 Holmewood is focused on the purpose built Ryecroft Village parade of shops but also incorporates civic uses located nearby. The centre appears to be struggling in retail terms, although it does provide a pharmacy, a small supermarket and a Post Office it lacks other facilities and contains many vacant outlets. Notwithstanding this, the centre is important to the surrounding residential population, in addition to the retail uses it contains a library, health centre and social club. Consequently the Council should seek to encourage investment in the Ryecroft Village parade in order to encourage and sustain the role of Holmewood as a local centre. WYG recommend that no amendments are made to the boundary of the local centre.

### **Horton Grange Local Centre**

13.50 Horton Grange is a thriving local centre, accommodating a pharmacy, a Post Office and a newsagent in addition to a number of important uses including a laundrette and a grocer. It contains a number of good quality restaurants together with take-away and fast food outlets. Notwithstanding this, there is a relatively high proportion of vacancies and the centre would benefit from these, particularly the large vacant outlet on the junction of Great Horton Road/All Saints Road, being brought back into active use.

13.51 It is evident that the existing boundary excludes a large restaurant, located at 211 Great Horton Road. WYG recommend that this outlet be brought into the boundary of Horton Grange Local centre, but do not propose any other alterations.

### **Idle Local Centre**

13.52 WYG propose no changes to the boundary of Idle Local Centre, and consider it to be performing effectively as a local centre. From examination of the retail uses present, it provides an array of facilities for local residents including a Post Office, a Co-op supermarket, a newsagent, a doctors, a number of retail banks and many leisure and retail service uses, although no pharmacy is present. The centre contains a large vacant outlet towards its western perimeter. This would provide a large area for future retail development, or alternatively residential development.

### **Laisterdyke Local Centre**

- 13.53 From examination of the diversity of uses present in this centre, whilst it does contain a pharmacy and a convenience superstore it is seen to lack a Post Office or newsagent. However, it does accommodate many other retail and leisure uses, with a number of take-away outlets, restaurants, a branch of Yorkshire Bank and a number of comparison outlets. The proportion of vacancies is above the national average, and these offer the potential to broaden the retail offer of the centre.
- 13.54 WYG recommend that the boundary of Laisterdyke Local Centre is extended to include 727 Leeds Road, 729 Leeds Road, the derelict land adjacent to the Napier Terrace/Leeds Road junction, Liberty House and the vacant land adjacent to the Marsland Place/Leeds Road junction. This would allow expansion for more modern retail outlets in the local centre subject to demand, and it would incorporate outlets current trading as retailers but located outside of the local centre.

### **Leeds Road Local Centre**

- 13.55 Leeds Road adequately performs its role as a local centre and appears to be in good health. It contains a Post Office and a newsagent although no pharmacy or large supermarket is present. However, it contains a large number of other comparison traders, fast food and take-aways, restaurants, a butcher, a greengrocer and an off licence and thus provides important facilities to local residents which should be protected. At the same time, new retail uses in the area such as a pharmacy or small supermarket should be encouraged.
- 13.56 Whilst WYG does not propose that any amendments are made to the local centre boundary, there is a large area of derelict land to the west of the centre between Steadman Street and Whitehead Street which could accommodate appropriately scaled retail uses in the future and allow a natural extension of the centre, should it be required.

### **Lidget Green Local Centre**

- 13.57 Lidget Green Local Centre is a strong local centre. Although vacancies are above the national average, it offers a range of goods and services including a Co-op store, a pharmacy and a Post Office. Broadening of the centres convenience goods sector should be supported. WYG note that the boundary of the local centre includes a number of residential properties, and would advise that the boundary is consolidated to exclude these. As such, WYG suggest the exclusion of 3 to 31 Beckside Road from Lidget Green Local Centre.

### **Marshfields (Manchester Road) Local Centre**

- 13.58 Marshfield (Manchester Road) Local Centre is considered to be performing well, although a newsagent is the only store that it contains which is advised prerequisites for local centre status as advised by PPS6. Despite this, the centre contains an array of uses which are important to the local community, including a Lloyds TSB branch, a number of take-aways and a variety of comparison goods traders, and as such WYG believe that the local centre designation should remain.
- 13.59 The centre is split into two parts by the busy Manchester Road. The majority of retail outlets are located to the west of Manchester Road, with the area to the east of Manchester Road being largely unused incorporating an area of derelict land, a vacant medical centre and a smaller vacant outlet, with only one outlet, a take-away, still in active use. Adjacent to these facilities is a Topps Tiles and Central Tyre facility, which appears to have been developed since the boundary of the local centre was defined.
- 13.60 WYG advise that the local centre boundaries be redrawn to exclude the area of land to the east of Manchester Road. This area is largely vacant and is unlikely to come forward for retail uses that are appropriate for a local centre. This area of land currently makes no contribution to the local centres retail offer and would be better developed for alternative, possibly residential, uses.

### **Oak Lane, Manningham Local Centre**

- 13.61 This local centre appears to be performing well at the current time and WYG propose no changes to its form or boundary designation. Although it lacks a Post Office or a newsagent, it does contain a pharmacy and a small supermarket in addition to a wide range of other retail and leisure uses. A large health care facility is located adjacent to the boundary of the local centre. Oak Lane seems to be well used by the local population, and existing retail facilities in this locality should be supported and new facilities encouraged.

### **Princeville Local Centre**

- 13.62 Princeville Local Centre is currently performing poorly and the Council should actively encourage a significant strengthening of its retail offer. The centre has a high proportion of poor quality vacancies, with those outlets that are in active use offering a limited range of goods and services. The centre contains no Post Office and no pharmacy, although it does contain a Co-op supermarket and two newsagents.

13.63 This local centre is in an important location and its role as a local centre should be supported if possible. The centre does not currently perform the role of a local centre, but if new retail and service uses are provided this situation will change. The centre is overlapped by the catchment of other local centres nearby, although given the densely populated nature of this location removal of the local centre status of this area may lead to a gap in provision and hinder social inclusion. The Council should monitor the situation carefully and consider delisting the centre should diversification of the retail offer fail to occur.

### **Queensbury Local Centre**

13.64 Located in an orbital village of Bradford, Queensbury is performing the role of a local centre well. Given its location at the junction of the A644 and the A647, it appears to be used by both local residents and passing motorists. The centre contains a diverse range of retail goods and services, which includes a Co-op supermarket, a pharmacy, a Post Office and a newsagent in addition to NatWest, Yorkshire Bank, a key cutters, public houses, cafes, fast food and take-aways and hairdressers.

13.65 It is notable from site visits undertaken by WYG that since the boundaries of the local centre were defined the Black Dyke Mill Retail Park, which comprises bulk goods retailers, has been developed on part of the site that constitutes Black Dyke Mill. WYG recommends that the boundary of the local centre be extended to include these retail outlets which are situated at the High Street/Brighouse Road junction.

### **Saltaire Local Centre**

13.66 Saltaire Local Centre is the only local centre defined in the Shipley conurbation. It is apparent from site visits that it is a strong and healthy centre, with a good mix of different types of retail uses, and between independent and national multiple retailers. It contains the required elements of a local centre, in addition to offering a range of other goods and services.

13.67 Given the success with which the centre is operating, WYG would suggest no changes to the local centre boundary.

### **Shearbridge/Listerhills (Woodhead Road) Local Centre**

13.68 This local centre lacks the necessary range of goods and services to be considered a successful local centre. It does contain a Lloyds Pharmacy, but the majority of the eleven retail outlets present in this centre are clothing or textile outlets. Indeed, it only contains one trader in the convenience sector, which is a greengrocer.

13.69 WYG do not consider it to be performing the role of a local centre and advise that it is downgraded. This would not affect the existing retailers present in this locality, but would focus new retail facilities on other, more viable centres nearby. Indeed, it is evident from examining provision in this area of Bradford that the 500m catchment of this centre is overlapped entirely by other local centres, namely Lidget Green, Princeville and Horton Grange. As such, the loss of this local centre would lead to no gaps in retail provision for residents of this area.

#### **Silsden Local Centre**

13.70 This local centre provides goods and services for the residents of Silsden village in the north-west of the District. As well as the recommended uses of a local centre as suggested by PPS6, Silsden contains a plethora of additional retail, leisure and service uses and serves well the needs of the catchment population. WYG do not propose any changes to the defined boundaries of this centre.

#### **Sticker Lane Local Centre**

13.71 This local centre is dominated by a large-format Dunelm retail warehouse, although it also contains a small convenience store and a Post Office amongst other, mainly service, uses. It does lack representation in several key sectors with both the comparison goods offer and the convenience goods offer being poor. In addition, it contains no financial and business service outlets whatsoever, although these are not necessarily expected to be present in a local centres.

13.72 WYG recommend maintaining this centres status as a local centre despite it having a limited retail goods offer. The Council should encourage applications which would diversify the provision of goods and services available in this centre, but should monitor the situation carefully and it may be appropriate to downgrade this centre at a later stage. It would be beneficial to maintain this area as a local centre however, as there is limited overlapping between the catchment of this centre and the catchment of other local centres in Bradford.

13.73 In order to help encourage the development of additional retail facilities in this locality, WYG suggest that the boundary of the centre is extended to north-west to incorporate the area of wasteland which lies between Bowling Back Lane, Furnace Inn Street and Sticker Lane.

#### **Thornton Local Centre**

13.74 Thornton Local Centre serves the village of Thornton and appears to be performing well. Although it does not contain a pharmacy, the centre does have a Post Office, a Co-op and



two newsagents, as well as a strong leisure and retail service offer. It appears to be serving adequately the needs of the local population.

- 13.75 A number of poor quality vacancies are present in Thornton along Kipping Lane and Market Street, which does not benefit from custom from passing motorists. The Council should consider removing some of these vacant outlets from the boundary of the centre in order to encourage their redevelopment for residential purposes. Although this would reduce the proportion of retail floorspace available in the centre, the current proportion of vacancies is significantly above the national average. Conversion of these outlets to residential uses would significantly improve the environmental quality of this part of the centre, and it may be more appropriate to concentrate new retail development on the more successful part of the centre along Thornton Road if possible. As such, WYG suggest the removal of the following outlets from the Thornton Local Centre boundary: 110 Market Street, 112 Market Street, 10 Kipping Lane and 57 Market Street. This would remove the worst quality vacancies from the centre, although better quality vacancies are still included in the boundary in order to encourage their development for retail purposes.

#### **Undercliffe Local Centre**

- 13.76 This local centre contains good representation from both retail and service providers, containing a Post Office, a Co-op, a newsagents and a pharmacy amongst an array of other uses. Undercliffe is functioning well as a local centre. WYG note that the extent of the centre has grown since the boundary was defined, and there are several outlets along Otley Road that are in use for retail purposes but lie outside the local centre boundary. Consequently, WYG would advise that the boundary of this local centre be revised to include numbers 439-441 Otley Road and 443 Otley Road.

#### **White Abbey Road Local Centre**

- 13.77 From visiting White Abbey Road it is evident that it is a unique local centre. Although it contains a newsagent, it contains none of the other recommended uses of a local centre; however it is a different entity from the average local centre and caters for the niche Asian market. Indeed, the centre is dominated by comparison retailers selling Asian clothing, shoes, textiles and jewellery, with retailers being of high quality and a low proportion of vacant outlets.
- 13.78 Given the important and unique nature of this centre, WYG believe the local centre designation should remain despite its lack of representation from uses normally associated with a local centre. It is clear that the centre serves a significantly larger catchment than the 500m recommended given the unusual nature of the shops, but the successful retailing here

should be supported and encouraged. There is limited room for this centre to expand as it is tightly constrained at either end. However, the Council could consider extending the boundary of the centre along Arthington Street to provide further space for new retail developments to occur. Given that this area is somewhat hidden from White Abbey Road itself though, including passing traffic, it is unclear whether this location would be considered economically viable by retailers.

### **Wibsey Local Centre**

13.79 Wibsey is a relatively large local centre incorporating 62 outlets and offering a diverse range of retail and leisure uses. In functions effectively as a local centre, containing all of the minimum recommended uses contained in PPS6 in addition to a wide array of important other uses. It appears to be well used by local residents. WYG propose no changes to the boundary of this local centre.

### **Wrose Local Centre**

13.80 Wrose is a compact local centre and contains a limited range of retail goods and services. Occupied retail outlets have changed since the boundaries of the centre were defined, and a number of outlets within the local centre boundary are now in use for residential purposes.

13.81 Wrose is a struggling centre, with only seven active retail outlets and two vacancies. However, it is located some distance from other local centres and should be maintained if possible. Furthermore it does contain a Co-op store and a Post Office, in addition to a fast-food and take-away outlet, a laundrette, a community centre and a library amongst other uses. As such the services it does provide are important for the local community.

13.82 WYG recommend that this centre remains defined as a local centre despite its lack of provision in a number of key areas. The Council should be supportive of applications for new retail and leisure developments in this locality, and applications for further residential conversions within the local centre boundary are resisted.

13.83 WYG advise that the boundaries of this local centre be adjusted to exclude the outlets now in uses for residential purposes. Moreover, the Post Office is currently outside the local centre boundary and should be within it. A car servicing garage is located adjacent to the Post Office, and whilst this use is not normally associated with a local centre WYG suggest that this is outlet be brought into the local centre boundary, as this site could potentially be redeveloped in the future for alternative retail uses. Resultantly, WYG suggest that the following outlets are removed from the Wrose Local Centre boundary: 54 Wrose Road, 56 Wrose Road, 58 Wrose Road, 60 Wrose Road, 62 Wrose Road and 64 Wrose Road; and

conversely the following outlets are included in the local centre boundary: 53 Wrose Road, 55 Wrose Road and 57 Wrose Road.

### **Wyke Local Centre**

13.84 This local centre serves residents of Wyke village and contains a good array of retail and service provision which includes a Netto, a Co-op and a Post Office in addition to a Yorkshire Bank branch, a Barclays branch, a variety of leisure services and a laundrette. This centre is performing well as a local centre. Given that there is an above average representation of vacancies in Wyke, WYG do not propose any amendments to the boundary of the centre and there is sufficient space for retailing in Wyke to expand within the confines of the defined local centre boundaries.

### **Conclusions**

13.85 WYG consider that the following centres are performing their role well and require no planning policy intervention from the Council:

- 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.

13.86 The following centres are, in the view of WYG, struggling and would benefit from investment or a greater diversity of uses. These centres should be monitored carefully and appropriate scaled retail development encouraged:

- Allerton Local Centre;
- Bankfoot (Manchester Road) Local Centre;
- Cross Road (Keighley) Local Centre;
- Crossflats Local Centre;
- Eccleshill Local Centre;
- Fell Lane/Oakworth (Keighley) Local Centre;
- Holmes Wood Local Centre;
- Princeville Local Centre;
- Sticker Lane Local Centre;
- and
- Wrose Local Centre.

13.87 Based on site visits, analysis by WYG and consideration of PPS6, the following centres should not be defined as local centres:

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

13.88 It should be noted that this Section provides an assessment of existing local centres only, and does not consider shopping facilities in other localities. It may be that there are retail facilities within the Bradford administrative area that should be defined as local centres in the forthcoming LDF process. This is a separate undertaking to that undertaken above, although WYG recommend that Bradford Council do carry out a survey of smaller freestanding areas of retail to see whether there are any areas which should be defined as local centres.

**14 FUTURE POLICY STRATEGY FOR LOCAL DEVELOPMENT FRAMEWORK**

14.01 The current retail and leisure strategy for key town centres within the district of Bradford is set out in Chapter 7 of the Replacement UDP (RUDP) (Adopted 2005).

14.02 From review of Chapter 7, of the RUDP it is clear that the future retail planning policy direction needs to be amended and reviewed to take into account national planning policy set out in PPS6, which now supersedes PPG6. Therefore any emerging Local Development Framework will need to ensure that it reflects the national guidance set out in PPS6. WYG can confirm that the aims and objectives of PPS6 state:

- Promoting vitality and viability of town centres;
- Planning the growth and development of existing centres; and
- Promoting and enhancing, by focusing development in such centres and encouraging a wide range of services in a good environment, accessible to all.

14.03 The starting point for the strategy is the identification of a hierarchy and role of centres within the District. The hierarchy is clear and provides a network of town, district and local centres, which we have reviewed in the previous three sections of this report. The proposed hierarchy is set out below.

<b>CITY CENTRE</b>				
Bradford				
<b>TOWN CENTRE</b>				
Bingley	Ilkley		Keighley	Shipley
<b>DISTRICT CENTRES</b>				
Five Lane Ends	Girlington	Great Horton Road	Greengates	Thornbury
<b>LOCAL CENTRES</b>				
Tong Street				
Addingham; Baildon;	Idle; Horton Grange	Silsden Thornton	Allerton; Cross Road (Keighley)	Saltaire Crossflats
Barkerend Road;	Haworth (Mill Hey)	Undercliffe	Eccleshill;	Fell Lane/Oakworth (Keighley)
Denholme; Carlisle Road/Whetley Hill	Laisterdyke Lees Road	Queensbury Wibsey	Holmes Wood Duckworth Lane;	Princeville Frizinghall

Clayton; Burnley-in- Wharfedale;	Lidget Marshfields (Manchester Road)	Wyke Oak Lane, Manningham	Sticker Lane Haworth (Main Street)	Wrose White Abbey Road
		Bankfoot (Manchester Road)		

14.04 Although this study has not specially been asked to look at locations for new centres, PPS6 requires local planning authorities to consider the designation of new centres in areas of significant growth or in areas of clear deficiency, with priority given to areas of high deprivation, where access to local services is needed. From the accessibility review set out in Section 9 of the study, we highlighted the network of town, district and local centres as well as known foodstores. From this analysis we found that generally the district is well catered for with existing retail (convenience) facilities. However, from closer inspection we did find that there may be scope to designate some local centres to ensure that most of the district is covered. WYG has identified that the following settlements areas should be considered for designation of a local centre. We should note that some of these centres (\*) do benefit from a foodstore/superstore. The settlements are:

- Steeton with Eastburn;
- Menston \*;
- Riddleston \*;
- Oakworth \*;
- Harden;
- Cullingworth \*
- Wilsden \*;
- Cottingley \*;
- Heaton \*;
- Sandy Lane \*;
- Low Moor \*.

14.05 If any future retail strategy is to address social exclusion issues and deficiencies, then it will be essential that the above settlements with no identified supermarket/foodstore present should represent the priority for some form of daily provision to meet daily needs. The Council will need to consider allocating these strategic locations for local centres to ensure that social inclusion and accessibility considerations are satisfied through the emerging LDF.

14.06 The thrust of the existing UDP strategy, through Policy UDP6 seeks to sustain and enhance the vitality and viability of the centres by encouraging their role and providing sequential preference for meeting retail, leisure and office development within centres. This approach is recognised in national guidance in PPS6. PPS6 recognises the importance of sustaining vital, thriving, safe and viable town centres. One of the main objectives of PPS6 is to deliver sustainable patterns of developments through high density mixed use development that reduces the need to travel. PPS6 recognises (paragraph 1.9) residential as an important

element in mixed use, multi-storey development. We believe that any alternative Policy UDP6 should be worded as follows:

*“The Council seeks to sustain and enhance the vitality and viability a network of town, district and local centres in the district by ensuring that new appropriate scale retail, leisure and office development is encouraged in sequential preferable locations.”*

#### **Policy CT1**

- 14.07 Policy CT1 deals with new development within city and town centres. WYG believe that the policy is not relevant in light of PPS6 and can be omitted and replaced by amendments to CR1a.

#### **Policy CT2 and CT3**

- 14.08 Policy CT2 and CT3 of the RUDP are still suitable and appropriate for the future policy approach in the LDF. WYG support the Council’s policy approach to encourage vacant and underused upper floors provided it does impact on the retail function of the shopping areas. Furthermore WYG support Policy CT3 which encourages residential uses on upper floors. The occupation of upper floors can add significantly to the vitality and viability of city, town, district and local centres and should be encouraged.
- 14.09 PPS6 (paragraph 2.21) states that residential development should be encouraged as appropriate uses above ground floor retail, leisure or other facilities within town centres. PPS6 seeks that town centres diversify their vitality and viability as it encourages complementary uses during the day and evening periods and reinforces the role of town centres. National guidance for town centres clearly sets the precedent that residential uses are appropriate above ground floor commercial uses. From review of the town centres as part of this study, we found little evidence that there were significant levels of residential uses at upper floors. Notwithstanding this and in light of national guidance, Policy CT2 should be retained in the LDF.

#### **Policy CT4**

- 14.10 It is not the remit of this technical retail study to comment on detailed design aspirations.

#### **Policy CT5**

- 14.11 Policy CT3, deals with non-retail uses within the primary shopping areas, this policy encourages (A1 Use Class) development within the primary shopping areas of Bradford,

Bingley, Ilkley, Keighley and Shipley. WYG can advise that this is a sensible and standard policy approach to control new non-retail uses within the respective town centres and should be retained in the LDF. The three criteria set out in CT5 are standard planning considerations which are still relevant.

- 14.12 This policy could be amended to introduce primary and secondary frontages within the new defined primary shopping areas as an alternative control mechanism. For example the introduction of primary shopping frontages to key shopping streets (Darley Street and Kirkgate, Bradford; Brook Street, Ilkley; Market Square, Shipley and Airedale Centre, and Keighley).

### **Policy CT6**

- 14.13 Policy CT6 seeks to control inappropriate uses within town centres which could have an adverse effect on the amenity of town centre users. Although this policy is relevant, WYG would state that the aims of this objective could be provided through other generic strategic (development control) planning policy, which deals with amenity and does not need to be within the retail policy section.

### **Retail Policies**

- 14.14 The Current RUDP has a retail strategy for the district which supports Policy UDP6. As previously advised WYG would recommend that this strategy is updated to reflect the guidance in PPS6. This could include strategic objectives such as those set out in paragraphs 1.3 to 1.5. However, we should note that it is not the purpose of development plan documents (DPD's) to repeat national or regional policy guidance but reflect local circumstances on social, economic and environment objectives.

### **Policy CR1A**

- 14.15 Policy CR1A deals with new retail development within city centres and town centres. Although the thrust of the policy is still relevant, WYG would recommend that this policy be amended to reflect the guidance in PPS6. WYG would recommend that the policy be changed to the following:

“Retail development will be permitted in the following locations:

- 1) within the defined primary shopping areas of the city centre and town centres,
- 2) within the retail areas of the district centre and within local centres, as defined on the proposal maps:
  - provided that it is of scale which is appropriate with the role and function of that particular centre and the catchment it serves;



- provided that it does not have an adverse effect on the vitality and viability of the local centre of other city, town or district centres”

### **Policy CR2A**

14.16 Policy CR2A deals with convenience retail development within locations lying beyond 500 metres from any defined shopping location (see CR1A). The policy seeks to permit such development when it is appropriate or in areas of deficiency. WYG would recommend that this policy does not need be to be proposed in any emerging LDF, as the proposed CR1a above should deal with out-of-centre retail development adequately.

### **Policy CR3A**

14.17 On review of Policy CR3A, the policy deals with the continued demand and needs of small shops (defined as below 150 sq. m). Although not specifically referred to in PPS6, WYG recognise that such small retail provision can offer essential daily goods and services to local communities. WYG believe that this policy should be retained in some semblance as it will help to maintain such facilities which will help meet community and social inclusion objectives, especially for those disadvantaged groups with limited access to private transport.

### **Policy CR4A**

14.18 Policy CR4A deals with new retail development outside existing city, town and district centres. WYG believe that the policy is out of date when compared to the policy direction set out in paragraph 3.4 of in PPS6. The current policy does not reflect the introduction of the primary shopping area as the first preference for new retail development and other considerations introduced by PPS6. WYG would recommend that the policy be amended to state:

*“Retail development will only be permitted outside of the primary shopping areas as defined in CR1a if the following criteria are satisfied:*

- 1) *The developer has demonstrated a quantitative and qualitative need for the additional retail floorspace;*
- 2) *The proposed development is of an appropriate scale;*
- 3) *There are no alternative central sites within the primary shopping areas which are suitable, viable or available, with preference then given to edge of centre sites before out-of-centre site are then considered.*
- 4) *The proposed development will not have unacceptable impact of the vitality and viability of existing town, district and local centres; and*
- 5) *The proposed development is accessible to all modes of transport, especially public transport.*

- 14.19 WYG would recommend that the Council considers review of both the town centre boundaries and primary shopping area and for each of the city, town and district centres. WYG has provided our recommendation for the city and town centres in Appendix 12. WYG can also confirm that the any emerging LDF policy can remove central shopping areas and expansion areas from the proposal plans. PPS6 requires just town centre boundaries and primary shopping areas to now be provided.

## **Leisure Policies**

### **Policy CL1**

- 14.20 On review of Policy CL1, WYG would advise that this needs to be amended to reflect the criteria in PPS6. The policy should be amended to state:

*“Proposal for leisure, business and other main town centres uses within the city, town or district centre boundaries as defined on the proposals map will be permitted”.*

### **Policy CL2**

- 14.21 On review of Policy CL2 of the RUDP deals with leisure development in the city and town centre expansion areas. WYG would advise that this policy can be removed from any emerging LDF policy as the boundaries referred to in the revised CL1 policy above include most of the expansion areas and therefore by definition will encourage new leisure, business uses to these areas.

### **Policy CL3**

- 14.22 Policy CL3 of the RUDP deals with proposals for new leisure and entertainment development (that attracts people from a wide area) to be permitted outside existing centres. Although the main thrust of this policy is sound, WYG would suggest that this needs to be amended to reflect PPS6. This revision should follow a similar approach to that provided for CR3a. This could include:

*“Proposals for leisure, entertainment and business development will only be permitted on sites outside the city, town and district centre boundaries (as defined) if:*

- (1) Need for the addition leisure, entertainment and business floorspace can be demonstrated;*
- (2) The scale of the proposed development is of an appropriate scale;*

- (3) *There are no alternative central sites within the city, town or district centre boundaries which are suitable, viable or available, with preference then given to edge of centre sites before out-of-centre sites are then considered;*
- (4) *The development will not have an adverse effect on the vitality and viability of any existing city, town or district centre;*
- (5) *The proposed development is accessible to all modes of transport, especially public transport;*
- (6) *The proposed development would not result in unacceptable highway impacts;*
- (7) *The development would not undermine the leisure or economic development strategy of the LDF;*

### **Policy E3A**

14.23 On review of Policy E3A, which deals with new office development, WYG can advise that the policy is in accordance with PPS6 and does not need to be amended, but can be dealt with through the above revised Policy CL3. However, the Council could decide to keep leisure and business uses separate, despite both land uses being acceptable in town centres. Notwithstanding this WYG would suggest that the criteria in Policy E3A for the office development outside existing centres also include:

*(6) be in locations that are accessible by a choice of means of transport, including public transport, cycling, walking and the car.*

14.24 WYG believe that the proposed changes to the existing RUDP set out above will ensure that emerging LDF retail policy is compliant with PPS6. However, we should note that the above recommendations are to be used as guidance and may require further input from the local planning authority, once key planning policy decisions have been made.