City of Bradford Metropolitan District Council

Bradford Retail & Leisure Study Update

Executive Summary

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EXECUTIVE SUMMARY

Purpose of the Study

1.01 WYG Planning & Environment (WYG) was commissioned by Bradford Metropolitan District Council (BMDC) in March 2012 to undertake an update of the principal findings of the previous Bradford Retail and Leisure Study (BRLS), which was completed in June 2008. The key purpose of the report is to update both the retail and leisure needs/capacity assessment over the period to 2028 and to provide an up-to-date review of the performance of all centres in the district.

1.02 A key requirement of the Study is the detailed understanding of shopping patterns in the Study Area in terms of the use of the city centre, town centres, district and local centres, along with the identification of each centre's catchment area. In order to allow comparisons with the results of the BRLS (2008) the same Study Area has been adopted, which comprises 18 zones, as chosen for the 2008 Study. WYG commissioned specialist market researchers to undertake a comprehensive household telephone survey to identify consumer's habits and preferences in the Study Area, with 1,800 surveys undertaken in total. Comparisons have been made with the results of the household survey commissioned as part of the BRLS (2008) in order to identify any changes in local shopping patterns.

1.03 On-street surveys were also undertaken in the five principal town centres within the district to understand customer views. While business surveys of all businesses in these five town centres were carried out to explore the current strengths and weaknesses from a business operator's perspective.

Health Checks

1.04 In accordance with the requirement of the National Planning Policy Framework (NPPF) for local authorities to pursue policies that support the viability and vitality of town centres, as part of this Study a review of the health of the five principal centres in the district was undertaken. The health checks conclude that Bradford city centre as the principal centre in the district is well provided for in terms of comparison and financial and business service units. However, the centre is performing poorly in terms of vacancy rates and would benefit from additional investment and the attraction of further national operators to strengthen the city's role as a Regional Centre. It is identified that Keighley is well represented in terms of both national and independent retailers and has benefitted from investment in recent years. However, the town centre would benefit from additional leisure and financial and business provision and any rise in the vacancy rate in the centre should be carefully monitored. Ilkley is considered to be a vital and viable centre which offers a high proportion of independent retail units and a favourable environmental quality. Shipley is concluded to be performing well in catering for local shopping needs, however the town centre would benefit from investment and the refurbishment of some units. Bingley exhibits signs of being a vital and viable centre with recent investment having occurred in the centre through the development of the 5Rise Shopping Centre helping to improve the centre's provision.

1.05 The Study also provides a health check analysis of the seven district and 47 local centres in Bradford district, as outlined in the Bradford Core Strategy Engagement Draft report (Policy EC5, October 2011). The assessment concludes that the majority of the district and local centres have remained vital and viable since the BRLS (2008) was undertaken and it is recognised that these centres perform a key role in serving the local population, whilst complementing the five principal centres in the district. It is recommended that, with the exception of Bankfoot (Rooley Lane), Sandy Lane and Bolton Junction that no changes to the designation of these centres should occur. However, some minor changes to the centre boundaries are advised.

Shopping Patterns

1.06 A key element of the Study was to obtain an understanding of the catchment of the existing settlements and towns within Bradford. The Study looks at the market share of existing facilities based on shopping trips for various goods, for example, main food, clothing, electrical goods etc. The results were compared to the results of the BRLS 2008 survey in order to identify any significant changes in shopping patterns. The reason for any changes has also been explored.

1.07 The results of the survey show that Bradford district retains a high market share in relation to both main food (78.5%) and top up shopping (80.1%) and the market shares have improved since 2008 (73.2% main food and 76.8% top-up). This highlights that the existing convenience retail provision within the district is performing well in meeting the needs of the district.

1.08 In relation to comparison goods, the market share retained by the district is lower at 59.5%, which is a moderate decrease (4.2 percentage points) from 2008, when the market share was 63.7%. It is evident that a substantial number of shoppers are travelling outside the Study Area to meet their comparison shopping needs, with destinations outside the Study Area attracting a comparison goods market share of 31.5%. Therefore, there is significant scope to improve the comparison goods offer within the district in order to improve the market share and reduce the level of shopping leakage in the wider sub region.

Population and Expenditure

1.09 In order to understand the expenditure available within Bradford district to support existing and any additional retail floorspace, a review of current population and expenditure levels has been undertaken as part of the Study. The estimated growth in the population and expenditure at five year intervals up to 2028 has also been calculated. The baseline scenario excludes the anticipated housing growth contained in the preferred spatial development options for housing growth across the district.

1.10 Taking into account the Study Area's market share of both convenience and comparison goods, as derived from the household survey, it is calculated that there will be an increase of approximately £175.1m convenience goods expenditure and £548.8m comparison goods expenditure at 2028 within the Study Area, based on a constant market share. The substantial increase in comparison goods expenditure is attributed to the forecast increase in the population and forecast high levels of comparison goods expenditure growth.

1.11 It is advised that in order for the Study Area to capture the significant forecast growth in retail expenditure that the retail provision will need to be enhanced in the future to ensure that the growth is not lost to competing centres.

1.12 The results of the household survey have also been used in order to estimate the levels of expenditure which are directed towards each principal centre's shopping facilities.

Retail Capacity

Quantitative Need

1.13 The Study seeks to identify whether there is a need for new convenience and comparison goods floorspace in the Study Area up to 2028, taking into account the future expenditure available, extant planning permissions and the trading performance of existing stores. The Study also looks specifically at the estimated capacity for additional floorspace in each of the main centres in the district.

1.14 In terms of convenience goods, the results show that given the significant levels of extant planning permissions, there is limited residual capacity for additional convenience goods floorspace in the Study Area in the immediate or short term. However, capacity is likely to be available in the later part of the plan period (beyond 2022).

1.15 In terms of the capacity for future comparison goods floorspace in Bradford district, the Study finds that extant planning permissions, in particular for the Westfield Broadway Centre negate any identified need for major new comparison goods development up to 2028. It is recommended that a focus is placed on delivering these extant permissions to ensure future shopping needs are met.

1.16 In terms of the capacity for future convenience goods floorspace in the main centres in the district, it is concluded that there is no identifiable quantitative need in Bradford for further convenience goods development over the entire reporting period up to 2028. In Keighley, it recommended that in the short term there is no need to consider allocating new convenience goods floorspace in Keighley as the focus should be on delivering any convenience goods retailing in the Worth Valley Shopping Centre. The assessment concludes that there is no need to consider new sites for convenience goods retailing in Ilkley in the short to long term as the proposed enhanced Tesco store at Railway Road will meet future needs. In terms of Shipley, the results show that over the next five year period there will be capacity to support additional convenience floorspace. WYG recommend that the Council should prioritise the allocation of one site in Shipley, with the preference for a site which creates a well connected link with the rest of the town centre. In relation to Bingley, it is advised that, subject to the implementation of the Sainsbury's at Main Street, that there is no requirement for future sites to be allocated as current commitments should meet Bingley's long term needs.

1.17 In terms of the capacity for future comparison goods floorspace in the main centres in the district, WYG advise that the implementation of the Westfield Broadway scheme is likely to enhance Bradford's market share, which would increase surplus expenditure in the city centre. Therefore, although in the short term existing commitments would absorb the identified quantitative need for further comparison goods development, in the medium to long term there would be some additional capacity, albeit limited. These estimates rely on the delivery of the Westfield Broadway Centre and as such priority should be given to delivering this development to support the city centre. In terms of Keighley, it is concluded that extant planning permissions, in particular the Worth Valley Shopping Centre will absorb all identified quantitative need for further comparison goods development up to 2028. Similarly, in Ilkley, it is concluded that extant permissions, including the replacement Tesco store at Railway Road will absorb all identified quantitative need. In relation to Shipley, although it is identified that existing commitments will absorb all identified quantitative need to up 2017, there will be nominal capacity in the longer term to 2028. In Bingley, extant planning permissions, particularly the proposed Sainsbury's on Main Street will meet all the identifiable need for further comparison goods development up to 2028. It is noted that the proposed foodstore could lead to an increase in the town centre's market share and therefore any subsequent changes to shopping patterns should be monitored.

Qualitative Need

1.18 The Study also makes recommendations in terms of qualitative improvements required within the Study Area. It is concluded that Bradford city centre would benefit from significant qualitative improvements in its convenience and comparison goods provision and positive planning policy measures should be formulated to attract such investment in the short term to 2017. In particular, the provision of a city centre supermarket and supporting the delivery of the Westfield Broadway Centre are noted as priorities. In terms of Keighley, it is recommended that the delivery of the Worth Valley Shopping Centre should be prioritised. In relation to Ilkley, it is considered that the delivery of the replacement Tesco at Railway Road will bring qualitative improvements and help the town to compete with new facilities in Keighley. Soft town centre management measures are also recommended in Ilkley (as well as the other centres) in order to improve the town's competiveness and retail offer. It is concluded that there is a clear qualitative need to improve the convenience and comparison goods provision in Shipley. In terms of Bingley, it is noted that the proposed Sainsbury's store will improve local competition and choice in relation to the convenience sector. However, in terms of comparison provision, it is advised that Bingley will be required to manage its diminishing role as a comparison goods destination, with its future role focusing on the convenience and service sectors.

Leisure Capacity

1.19 The results of the household survey have also been used in order to determine the participation and the market share achieved by different categories of leisure activity in Bradford. This information has been used to understand the capacity for additional leisure provision in the Study Area. It is concluded that the existing leisure facilities in the district are satisfactory and the principal focus should be on retaining these over the plan period.

Future Retail Planning Policy Recommendations

1.20 In accordance with the requirements of the NPPF, the Study sets out a number of recommendations for future retail planning policies. It is concluded that the retail hierarchy proposed by the Bradford Core Strategy Future Engagement document is generally appropriate. However, recommendations are made for the re-classification of a limited number of centres. Recommendations have also been made as to the appropriate extent of the centre boundaries and primary shopping areas for the five principal centres. The Study also identifies a recommended range of thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment.

1.21 Recommendations are made for positive policy interventions to respond to the capacity identified in the Study Area. WYG estimate that the need for additional convenience goods provision could support two further large food superstores or a greater number of smaller stores in the Study Area. It is advised that a site in or on the edge of Bradford city centre should be prioritise in order to improve the qualitative need. In order to address the overtrading identified in the south of the district, the allocation of a foodstore site at Bankfoot (Rooley Lane) is recommended. In terms of other principal centres, it is recommended that the delivery of the existing convenience goods commitments in Bingley and Ilkley are encouraged. No major new convenience provision is recommended in Keighley, however it is advised that the position is monitored going forward. In terms of Shipley, it is advised that the key short term priority should be the delivery of a major supermarket in the town which is well linked to the town centre.

1.22 In relation to comparison goods provision, it is recommended that the implementation of the Westfield Broadway Centre in Bradford is prioritised in order to halt the trend of substantial expenditure flows to areas outside the district, and to assist in increasing the city centre's market share. In terms of the other main town centres, it is recommended that Shipley, Ilkley and Bingley build on their existing infrastructure through incremental comparison goods improvements, with a focus on strengthening their convenience and retail service function to meet the day to day needs of their local community. It is advised that the key priority for Keighley should be to support the implementation of the Worth Valley Shopping Centre and to ensure it is fully integrated with the rest of the town centre. Additionally, it is recommended that in all centres, soft town centre management measures should be utilised to improve their performance.