



City of Bradford Metropolitan District Council

Bradford Retail & Leisure Study Update

Final Report

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Address: Quay West at MediaCityUK, Trafford Wharf Road, Trafford Park, Manchester, M17 1HH
Tel: 0161 872 3223
E-Mail: planners.manchester@wyg.com
Web: www.wyg.com



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1.0 INTRODUCTION

Objectives of 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 this 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. This is of particular importance given the downturn in the UK economy since the reporting of the BRLS (2008) which has had a notable impact on these sectors.
- 1.02 The requirements for the Study included the following:
- Update the retail expenditure forecasts of the baseline condition (2007) and also take into account the growth planned for in the emerging Local Plan – Core Strategy by assessing alternative scenarios and identifying locations for new centres in areas of significant growth and/or in areas of clear deficiency;
 - Assess the quantitative and qualitative need and capacity for additional floorspace and leisure uses (including sports, tourism and cultural uses) in Bradford district to enable the Council to reach an informed judgement on the scale and form of development planned for through the Local Plan;
 - Update the assessment of the vitality and viability of the five key town centres of Bradford city centre, Ilkley town centre, Bingley town centre, Keighley town centre and Shipley town centre and undertake vitality and viability assessments of the district centres, local centres and neighbourhood centres;
 - Undertake a health check of the district's existing markets and identify the potential for new provision;
 - In light of the above findings, recommend suitable policies, strategies and proposals for the Local Plan including:
 - Definition of town centre boundaries (including primary shopping areas and primary and secondary shopping frontages);



- A range of criteria that could be used in policies to enhance and/or retain the centres' retail dominance while ensuring increased competitiveness and customer choice;
- Identification of an appropriate range of sites capable of accommodating any future retail and leisure (including sports, tourism and cultural uses) needs and consider their impact on existing centres; and
- Advise with regard to the minimum floorspace threshold for retail development in an edge or centre or out of centre location that should be subject to a supporting impact assessment.

Format of Report

1.03 The remainder of our report is structured as follows:

- **Section 2** provides a summary of current and emerging retail and leisure trends and a insight into the commercial market influencing town centres;
- **Section 3** provides a summary of the new national, regional and Local Planning policy of relevance since the previous Study was completed;
- **Section 4** examines the original market research which WYG has conducted;
- **Section 5** outlines the appraisal of the vitality and viability of the five principal centres;
- **Section 6** examines and summaries the position of the seven district centres and the 47 local centre across the district;
- **Section 7** examines the changes in shopping patterns between 2007 and 2012 from an analysis of the household survey results.
- **Section 8** considers current and future population and expenditure levels within the Study Area;
- **Section 9** sets out our assessment of quantitative need for further convenience and comparison goods floorspace in the periods to 2017, 2022 and 2028, taking into account changes in retailer representation since the reporting of the last Study;
- **Section 10** set out our assessment of the leisure capacity; and
- **Section 11** sets out our recommended future policy approach to meet the requirements of the NPPF and also delivering the future growth anticipated over the development plan period.



2.0 CURRENT AND EMERGING RETAIL TRENDS

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this time, retail and leisure sectors have both experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, cheaper prices, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending. The way in which goods are purchased has also altered due to the maturity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK¹.
- 2.02 The retail market and the need for new development is continually changing as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements, such as e-tailing. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending declined from 47.7% to 39.9% by 2012. In contrast, spending in out-of-centre locations has increased by 2.1% and non-store locations by 6.6%². These changes have had a major impact on the format and location of retail and leisure floorspace and have been recognised in the 'town centre first' policy approach which has been pursued by recent Governments and which is now outlined in the National Planning Policy Framework (NPPF) which was published in March 2012.

Current Retail Picture

- 2.03 Research undertaken by Colliers³ provides information on recent trends together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and there is considerable uncertainty about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, the UK economy entered a double dip recession in the latter months of 2011 and the retail market has since continued to decline. The significant reduction in Government spending due to the recent

¹ Experian Retail Planner Briefing Note 10, September 2012

² 'UK Out of town Retailing,' Verdict Datamonitor, April 2012

³ 'Great Britain Retail: Autumn 2012', Colliers, October 2012



austerity measures is also impacting on economic growth, with the UK unemployment rate recorded at 8.1% in July 2012.

- 2.04 These factors have had a significant impact on the public's general confidence, thereby reducing their propensity to spend their earnings on retail goods. Furthermore, since 2010 there have been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also suggest that growth in household spending is unlikely to counterbalance any reduced public sector spending. Furthermore, inflation had risen to such a level that it quickly outpaced average earnings growth; however, inflation is stabilising and is now at its lowest level in three years at 2.2% (October 2012).
- 2.05 The current economic conditions are resulting in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing the number of their stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. These steps have been taken by many well-known high street operators (including Optical Express which announced the closure of 40 stores in October 2012 and Thorntons which announced plans to close 180 stores in June 2011) and are recognised as being necessary in order to secure their future. The Local Data Company⁴ reports that the national vacancy rates equate to over 23,000 vacant shops in the top national town centres. However, these figures should be viewed with caution as they only relate to units and not floorspace (also LDC only survey the top 650 town centres). In addition, the national increase in voids results in a lack of investment in the upkeep of premises which in some cases is having a negative impact on the overall attractiveness of certain centres and secondary retail areas.
- 2.06 To address this, many retailers are re-negotiating their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with Colliers⁵ identifying several high street firms (including Monsoon and New Look) who are trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand

⁴ 'Q2 2012 Shop Vacancy Snapshot,' Local Data Company, July 2012

⁵ Great Britain Retail: Autumn 2012', Colliers, October 2012



has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer a greater retail and leisure 'experience' that consumers desire. In terms of prime retail rental values, Colliers⁶ note that national rates fell by an average of -0.9% in 2011, with levels falling further by -1.2% in 2012, with the average national prime retail rent £110 per sq. ft. Colliers also report that there is a marked regional variation in the rental rates, with London the only region to achieve rental growth over the 12 months to June 2012. Despite the difficult economic conditions, rental values in prime locations are expected to continue to rise, alongside increasing competition and demand for space in key locations. In Central London, for example, rates increased by 9.4% between June 2011 and June 2012, with the average prime rent £341 per sq. ft, rising to £1,000 per sq. ft at Old Bond Street. In contrast, several other regions experienced significant reductions in their average prime rental values during the 12 months, notably in Wales (-8.4%), the East Midlands (-5.7%), West Midlands (-3.7%), North West (-2.1%) and Yorkshire and the Humber (-1.8%).

- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest for well located and appropriately configured floorspace in key centres. Colliers⁷ also note that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns need to implement innovative ideas in order to improve spending rates and reduce trade leakage.
- 2.08 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's⁸ forecast annual per capita convenience goods growth rate is now +0.1% at 2012, -0.1% at 2013 and +0.0% at 2014. However, forecast annual per capita comparison goods growth rates⁹ are slightly more positive than in previous years, with growth of +1.4% forecast at 2012, +1.8% at 2013 and +2.4% at 2014. Whilst this is encouraging, it is evident that these forecast growth rates are well below the growth which was recorded prior to the economic downturn.

⁶ Ibid

⁷ Ibid

⁸ Experian Retail Planner Briefing Note 10.1, September 2012

⁹ Ibid



- 2.09 It was widely reported that a number of high street retailers suffered poor trading figures during 2009 and 2010, resulting in many operators going into administration. Indeed, despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a significant number of 'big name' retailers went into administration in 2008 and 2009, including Woolworths, Adams and Zavvi. Whilst retail administrations fell considerably in 2010, further high street brands affected included Envy, Ethel Austin, Habitat, Faith Shoes and Suits You. Colliers¹⁰ report that the number of companies going into administration has fallen from 54 in 2008 (affecting a total of 5,800 stores) to 31 in 2011 (affecting 2,500 stores). In the first five months of 2012, 30 retailers had gone into administration affecting 3,000 stores. In 2012, there have been several other high profile retailers who have struggled, including Comet (240 stores), Blacks Leisure (300 stores), GAME (333 stores) and Peacocks (550 stores). In the second quarter of 2012, Clinton Cards went into administration, though 397 stores were subsequently purchased by Lakeshore, a subsidiary of supplier American Greetings. JJB Sports also fell into administration in September 2012, and whilst 20 of the stores were sold to Sports Direct, the remaining 133 units have closed.
- 2.10 Despite the difficulties outlined above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has, on the whole, performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year. However, the increasing popularity of the internet to purchase, in particular, books and music has had a notable impact on the composition of town centres, with such stores all but disappearing from the high street.

Trends in Comparison Goods Shopping

- 2.11 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing (on line purchasing) and high rental levels secured before 2008. As a result of the current economic climate, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace

¹⁰ 'Midsummer Retail Report 2012,' Colliers, July 2012



and attract shoppers from a wider area. These larger floorplates enable retailers to provide a greater range of goods; for example, in 2011, Primark opened 1 million sq. ft of new retail space.

- 2.12 International market conditions and price deflation in some key sectors has also meant that many high street names are becoming increasingly vulnerable to takeovers. Colliers reports that consolidation and cost reduction in relation to high street property continues to be a priority for many retailers. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing the performance and their future strategies given the ongoing downturn in the economy. Consequently, 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

- 2.13 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 publication of PPS4 and subsequently the NPPF) 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 wide range of retail models, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;



- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

- 2.14 Verdict¹¹ identifies that the 'credit crunch' and subsequent recession – allied with a period of higher inflation – has had an impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are looking at value for money. Shoppers now realise that they are able to 'trade down' and switch to own-label ranges to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. Verdict reports that, as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.15 Verdict also states that changing UK demographics is having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are 'time poor' and relatively 'cash rich'. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking both to add additional small stores to their portfolio and to open (and expand existing) larger stores. Verdict indicates that, as the race for space intensifies, format flexibility will be essential.
- 2.16 Verdict¹² estimates that the food and grocery sector will be worth £130.0 billion in 2011, equating to annual growth of 3.2%, representing 43.7% of total retail spend. The four key supermarket chains in the UK have market shares of 31.0% (Tesco), 17.5% (Asda), 16.5% (Sainsbury's) and 11.4% (Morrisons).¹³ National multiple retailers, including the Co-op (6.8%), Waitrose (4.7%) and Aldi (2.9%), represent a total grocery market share of 97.8%.

¹¹ 'UK Food & Grocery Retailers', Verdict, September 2011

¹² Ibid

¹³ 'Grocery Market Share UK,' Kantar Worldpanel, 9th October 2012



- 2.17 More recently, there has been a slowdown in the growth plans of the majority of the major supermarket groups. Tesco in particular has indicated that its net new space growth in 2012 will be 38% lower than in 2011, with the company instead focusing on developing medium size units and investing around £1 billion on improving its current stores. Asda is the second largest supermarket retailer in the UK, with more than 500 stores nationwide. In 2011, Asda opened 22 new stores and acquired 193 Netto stores which allowed the company to increase its smaller store portfolio. However, as a result of Competition commission laws, Asda was required to sell 47 of the stores to other retailers, including Morrisons. Asda has recently focused investment on its smallest store formats (the Asda Supermarket), with the company having aspirations to deliver 250 Supermarkets by 2015. Morrisons intend to deliver 2.5 million sq. ft of new retail floorspace by 2013/2014, both through the continued development of large foodstore schemes and the new small scale M-Local convenience format store. Due to the success of the initial trials, Morrisons now intend to open 50 new M-Local stores by 2013/2014. The discount supermarket chain Aldi made a pre-tax profit of £57.8m in 2011 and it accounted for 4.1% of UK grocery spending. The retailer opened 29 new UK stores in 2011 and it is currently seeking to develop a further 40 stores by the end of 2013, thus bringing its total number of UK stores to over 500.
- 2.18 The role of supermarkets also continues to develop, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres now competing with five or more supermarkets within a two mile radius¹⁴. Whilst the impact of new supermarkets into an area is open to debate, it is evident, as noted by BCSC, that there has been a significant decline in the number of independent food retailers, including a reduction of 45% of greengrocers between 1996 and 2007, whilst the market share of total retail sales of the supermarkets has increased from 38% to 42% over the same period.

Out-of-Centre

- 2.19 Despite the 'pro-town' centre planning policies which were incorporated in Government guidance, research undertaken by Verdict¹⁵ indicates that between 2007 and 2012, the amount of out-of-centre floorspace increased by 23%. However, more recently, Colliers notes that the demand for out-of-centre representation has been limited, with those retailers seeking to acquire stores, having a pick of

¹⁴ 'What Does the future Hold for town centres?', BCSC, September 2011

¹⁵ 'UK Out of town Retailing,' Verdict Datamonitor, April 2012



vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. Only four out-of-town retailers have failed since June 2011, namely Allied Carpets, Clintons, GAME and Peacocks, with these operators trading from 114 retail park stores. Overall, the vacancy rate in out-of-centre retail warehouses in 2012 is 3.9%, an increase of 0.3% since 2011. Some of the voids created by the administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.

- 2.20 Looking forward, Colliers indicate that whilst out-of-centre locations have witnessed low levels of development during the last two years, it is estimated that one million sq. ft of new space is to be completed in 2012. There are also an increasing number of retailers acquiring larger stores, including several department-store type format operators including John Lewis Home, M&S and Primark. The large out-of-centre Oakgate scheme which was recently approved by the city of York Council, for example, will accommodate M&S, John Lewis and Next stores.

Shopping Centre Development

- 2.21 It is evident that shopping centre retail development is at a virtual standstill and, as a result, little activity is anticipated over the next few years. Colliers have indicated that the UK will never see a return to the level of shopping centre openings that was evident in recent times, with no major new centres due to open in 2012. The Trinity development in Leeds city centre, which is due to open in spring 2013, is the only scheme over 200,000 sq. ft which is currently under construction. There are currently six other schemes which have a floorspace of between 100,000 and 200,000 sq. ft which give a total floorspace of development currently under construction at 1.67 million sq. ft. BCSC¹⁶ note that these centres are being developed as they have achieved the thresholds, development finance and conditionality necessary to progress the schemes. In contrast to the average level of completions over the last five years (3.9 million sq. ft per annum), this level of shopping centre development is deemed to be very modest. In 2008, for example, almost 8 million sq. ft of new floorspace opened across 14 new schemes nationwide.
- 2.22 Viability is considered almost impossible to achieve no matter how well designed or well located a scheme is. There are three types of scheme which may still be successful in the current challenging

¹⁶ 'Shopping centre Development Pipeline 2012,' BCSC, June 2012



economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, and Lichfield are all examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand remains strong.

- 2.23 Proposed schemes which conform to one of these models are considered to be few and far between and for development to begin again in earnest, it will be necessary for improvements in retailer demand, a strengthening of rental levels, further improvement into the investment market and, critically, the availability of finance. For those towns without an oversupply of floorspace and with sites which can be brought forward without excessive levels of cost, some development may be able to be brought forward within the next five years. However, such opportunities may be the exception rather than the rule.
- 2.24 In addition to experiencing their retail offer, consumers are increasingly travelling to larger centres for their overall experience and to use the leisure facilities. Colliers notes that the largest destinations draw from a wider catchment, hence the need to retain consumers for as long as possible. In the past, it was recognised that non-retail uses typically occupied less than 10% of the space, though this has increased in recent schemes, including the Westfield Broadway Centre in Stratford where catering and leisure units occupy over 20% of the space.

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

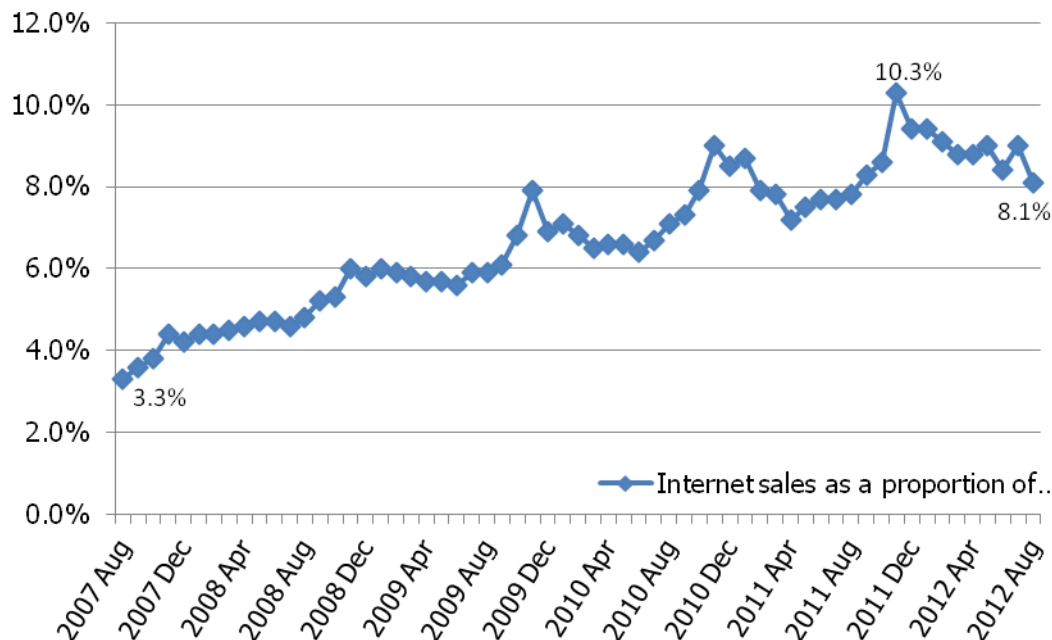
- 2.25 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. It is estimated that internet sales now account for 8.1% of all UK retail spending¹⁷ and this trend is set to continue, with Experian¹⁸ predicting that this will rise to 11.3% in 2016 (£39 billion). The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers including Amazon UK, Argos, and Next. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.

¹⁷ 'Retail Sales', Office for National Statistics, August 2012

¹⁸ Ibid



Figure 2.1: Internet Sales as a Proportion of All Retailing



Source: 'Retail Sales,' Office for National Statistics, August 2012

2.26 The growth in internet as a sales medium has been enabled through increased access to the internet by households, rising from 57% in 2006, 77% in 2011 and 80% in 2012.¹⁹ A total of 21 million households in Great Britain now have internet access (August 2012), an increase of 7.1 million since 2006. In addition, the proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with internet access. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store is also increasing in popularity, with the service accounting for 20% of John Lewis internet orders.

2.27 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, whilst the internet captures 3.1% of food sales²⁰.

¹⁹ Ibid

²⁰ 'Shop Expansion and the Internet', CBRE, May 2012



Verdict's research identifies that, with the exception of Morrisons (which does not trade online), major retailers have seen their online business grow as online shopping has increased and as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.

- 2.28 Office for National Statistics (ONS) data²¹ indicates that the number of people using the internet to purchase goods continues to rise, with 66% of the UK population purchasing products over the internet in 2011, compared to 53% at 2007. The most popular online purchases were clothes/sports goods, with 46% of internet users buying these items. In addition, 21% of users bought food or groceries and 38% bought household goods. Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini²² indicates that British shoppers spent £5.8 billion online in August 2012, a year-on-year growth of 11%. IMRG also state that all key retail sectors experienced improvements in sales between July 2011 and July 2012, particularly in the health and beauty (+30%), electrical (+30%) and gifts (+27%) sectors.
- 2.29 It is evident that internet shopping as a whole 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. However, it will be difficult to understand the true impact as the current economic downturn is also having a significant impact on rental levels. Having said that, it would appear that the smaller the centre, the greater the impact will be felt from online retailing. Within small shopping centres (sized between 5,000 sq.m and 20,000 sq.m), including those in market towns, it is likely that the growth of online shopping could reduce turnover notwithstanding any future growth in disposable income.
- 2.30 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing will not replace the shopping experience as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts, for example Ellis Bingham, have installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand

²¹ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2011

²² 'IMRG Capgemini e-retail Sales Index', September 2012



generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet. Clearly, those retailers who are likely to have a healthy future are those which combine a strong high street presence with an interesting and closely related e-tail offer.



3.0 PLANNING POLICY CONTEXT

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of the Bradford Local Plan, it is important to review key policy advice and explore how the current and emerging national planning documentation may impact upon the delivery of Local Plan policies. It should be noted that only those documents which have been adopted since the previous 2008 Study was completed are reviewed as part of this 2012 Update Study, namely the National Planning Policy Framework and the Bradford District Core Strategy Further Engagement Draft Development Plan Document (October 2011).
- 3.02 Since the BRLS (2008), the "Portas Review - An independent review into the future of our high streets" and the Government's response to this review, "High Streets at the Heart of our Communities" have been published. New Government guidance in relation to neighbourhood parades has also been released, "Parades of Shops - Towards an Understanding of Performance & Prospects" and "Parades of Shops to be Proud of: Strategies to Support Local Shops". A review of these documents is also provided below.
- 3.03 There have been no further updates to the Airedale Masterplan and Bradford city centre Area Action since the BRLS (2008). BMDC is in the process of preparing a masterplan for the Shipley and Canal Road Corridor which will inform the AAP Development Plan Document. The Council are also in the process of producing a 'Shop Keepers Guide to Securing Their Premises' SPD. The SPD is currently in draft form and once adopted will replace the existing Section 6 of the Shop Front Design Guide SPD (2007).

National Planning Policy Framework

- 3.04 The National Planning Policy Framework (NPPF) was published on 27th March 2012. The Framework replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars with this single consolidated document.
- 3.05 While the NPPF supersedes PPS4, the PPS4 Practice Guidance on need, impact and the sequential approach has not been withdrawn and remains a material consideration.



- 3.06 The main theme of the Framework is that there should be ‘a presumption in favour of sustainable development’. In terms of plan-making it is stated that Local Planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.07 In terms of economic development, it is set out within the NPPF’s core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. It is emphasised that every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.08 The Framework stresses the Government’s commitment to securing economic growth in order to create jobs and prosperity, with the Government seeking to ensure that the planning system does everything it can to support sustainable economic growth. The need for planning to encourage and not to act as an impediment to sustainable growth is stated and therefore it is prescribed that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that Local Planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.
- 3.09 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for Local Planning authorities in drawing up Local Plans and states that they should:
- “recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
 - define a network and hierarchy of centres that is resilient to anticipated future economic changes;
 - define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
 - promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;



- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, Local Planning authorities should plan positively for their future to encourage economic activity”.

3.10 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.

3.11 Paragraph 24 requires Local Planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan

3.12 Paragraph 26 indicates that Local Planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default will be 2,500 sq.m.

3.13 It also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre should have to satisfy an impact test and the sequential approach. In addition, consideration should also be taken of the impact on the vitality and viability of the area, including local consumer choice and trade in the town centre and the wider area, up to five years from the time of the application and up to ten years for major schemes where the full impact will not be realised in five years.



Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach

- 3.14 The Practice Guidance also confirms that an up to date assessment of the need for additional or replacement floorspace to accommodate town centre uses is a fundamental component of the evidence base to underpin policy making. Paragraph 3.2 indicates that both quantitative and qualitative need will have a role to play in reaching an overall judgement about the scale and form of development which should be planned for and facilitated through development plans. Quantitative need is identified as being that which arises as a result of forecast expenditure growth (either through population growth or increases in spending), or by imbalance between the existing facilities and the current level of available expenditure in an area. Qualitative need includes that which is related to customer choice, the appropriate distribution of facilities and the needs of those living in deprived areas.
- 3.15 Paragraph 3.4 of the Practice Guidance sets out the five key stages which will underpin an assessment of quantitative retail need, these being:
- the definition of the catchment/Study Area;
 - the assessment of current/future spend;
 - the assessment of current shopping patterns and market shares;
 - the comparison of current and forecast turnover with existing floorspace; and
 - the identification of future expenditure capacity and need for new floorspace.
- 3.16 Whilst the Study area has already been determined and informs the 2009 household survey, the latter four stages are of direct relevance to this Update and are used to estimate the capacity which exists at 2012 to support additional retail floorspace.

The Portas Review - An Independent Review Into the Future of Our High Streets and the Government's Response - High Streets at the Heart of our Communities

- 3.17 The Portas Review (December 2011) is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review looks at the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets and the benefits that



can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations including actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.

- 3.18 The Government released a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, namely out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In their response, the Government accepts the majority of recommendations put forward in the Portas Review including: the implementation of a Town Team: a visionary, strategic and strong operational management team for high streets; the provision of funding to pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts (BIDS); and supporting a new National Market Day. The Government's response encourages areas to think creatively about how their town centres can be reformed in order to entice people back including through the redesign of high streets and promoting the evening and night time economy.

Parades of Shops - Towards an Understanding of Performance & Prospects" and "Parades of Shops to be Proud of: Strategies to Support Local Shops"

- 3.19 This guidance highlights the important role that neighbourhood parades play in serving localised community needs, making an important contribution to sustainable communities and providing local facilities particularly for the elderly, disadvantaged and less mobile residents. The Government raises concerns in response to the findings of a number of case studies that the role of neighbourhood parades in supporting communities and contributing to local economic resilience is being underplayed. The guidance concludes that local policy should be focussed on supporting the retention and ongoing viability of neighbourhood parades.

Bradford Core Strategy DPD – Further Engagement Draft

- 3.20 The Bradford District Core Strategy Further Engagement Draft Development Plan Document (October 2011) outlines a long-term spatial vision for the district and sets out the preferred planning approach for development until 2028. It was published for consultation in October 2011 and provides a number of key strategic core policies, sub-area policies, thematic policies and implementation and delivery policies. The district is split into four sub-areas, with the city of Bradford sub-area including Shipley,



the Airedale sub-area including Bingley and Keighley, with the Wharfedale sub-area including Ilkley and the South Pennine Towns and Villages.

- 3.21 The Strategy identifies that Bradford city centre is currently the main focus for economic, educational, administrative and cultural activity within the district. It is envisaged by 2028 that the city will have become the main focus for development and growth, acting as the driver of the district's transformation and a vital component of the Leeds city Region economy. It is noted that this transformation will be symbolised by the regenerated city centre, with its thriving commercial and residential community. By 2028, the spatial vision for the district also notes that the Airedale Corridor (including the three inter-connected town centres of Keighley, Bingley and Shipley) will have become a creative, connected, lifestyle corridor that will have helped deliver the economic transformation of the district.
- 3.22 **Strategic Core Policy 4** identifies a hierarchy of the settlements and will be used to guide and control the distribution of development and growth in the district. The Regional city of Bradford (including Shipley and Lower Baildon) is identified as being the top tier of the hierarchy. It is noted that it will be the prime focus for shopping, leisure, cultural activities, employment, education, housing and health facilities in the district. In addition, it is noted that plans and strategies should also strengthen the roles and identity of Bradford city centre and Shipley town centre as accessible and vibrant focal points for high trip generating uses. The second tier comprises the 'Principal towns' of Ilkley, Keighley and Bingley, with the Strategy identifying that these will be the main local focus for shopping, leisure, housing, employment, health, education and cultural activities and facilities. Also, any emerging strategies should seek to enhance the vitality and viability of these centres. The third and fourth tiers comprise 'Local Growth centres' and 'Local Service centres and Rural Areas'.
- 3.23 **Policy EC5** states that plans, programmes, strategies and investment decisions should strengthen the role and performance of existing city, town, district and local centres. It is identified that Bradford city centre should be the focus for a wide diversity of economic activity, including convenience and comparison retail, leisure, offices, entertainment, arts, culture, tourism and the more intensive sport and recreation uses and the priority centre for promotional events and activities. In addition, Keighley, Ilkley, Bingley and Shipley town centres should be the focus for convenience and comparison retail, leisure, office, entertainment, arts, culture and tourism that is appropriate to the centres, and will not adversely impact upon the vitality and viability of Bradford city centre and other nearby town centres. The district centres should be the focus for convenience retail and limited comparison retail in order to



enable people to meet their day to day needs without the need to travel, and will not adversely impact upon the vitality and viability of Bradford city centre and other nearby town centres. Local centres within urban areas and villages are identified as a focus for appropriately sized local supermarkets and a variety of small shops to meet people's day to day needs and to reduce the need to travel. The Policy also notes that environmental enhancements, accessibility improvements, development and town centre management and promotional events and activities should take place in each of the centres within the district to create distinctive, attractive and vibrant sense of place and identity to be enjoyed and used by all.

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

- 3.24 WYG can confirm that the RSS for Yorkshire and Humber as been partial revoked in February 2013 under statutory instrument 2013 no 117. From review of the revocation, the only policies retained (policies YH9 and Y1) relate to the Green belt around York and therefore the partial retained RSS has no weight on spatial planning policy in relation Bradford.



4.0 ORIGINAL MARKET RESEARCH

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of the city centre, town centres, district and local centres and the identification of the centre's catchment area. WYG commissioned specialist market researchers NEMS Market Researchers Limited to undertake a comprehensive household telephone survey to identify consumer's habits and preferences in the Study Area. WYG also reviewed the previously commissioned household survey (also by NEMS) results undertaken as part of the 2008 BRLS.

Study Area

- 4.03 Drawing on the empirical evidence that was collated for the BRLS in 2008, a key element of this update was to review previous shopping patterns within the district that may have occurred since 2008 and which would seek to reflect the current economic position of the wider UK economy but also to see whether any retail led development both inside and outside the Study Area has changed local shopping patterns.
- 4.04 To provide consistency with the previous 2008 Study, WYG adopted the same Study Area which comprises 18 survey zones chosen for the previous 2008 Study. **Table 4.1** below sets out the postcode areas which comprise each zone. A map of the catchment is provided below at **Figure 4.1**.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
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 BD16 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 October 2012 a survey of 1,800 surveys were undertaken within the Study Area, which comprises all of the district of Bradford but also extends into the neighbouring authorities of Leeds, Calderdale, Kirklees and Craven. The geographical extent of the Study Area is shown below in **Figure 4.1**. The survey asked 100 respondents from each of the survey zones a series of questions on their retail and leisure activity. A full copy of the results of the survey is contained in **Appendix 4**.

On-Street Survey

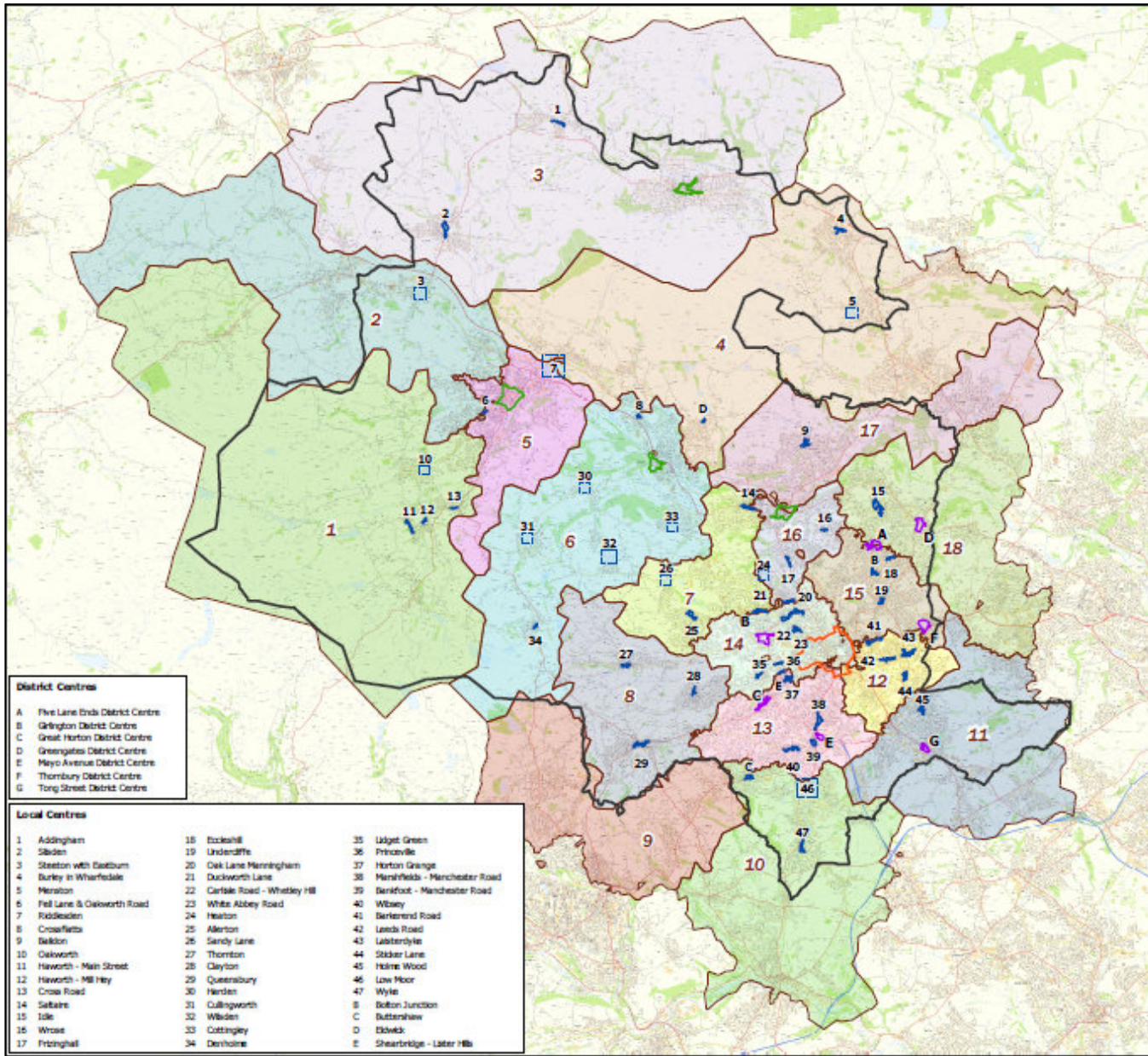
4.06 In addition, an on-street survey was undertaken in the five principal town centres within the district in order to identify customer views, including their perception of each town centre and how the centres could be improved. In total 400 surveys were undertaken within the centres of Bradford (150 surveys), Bingley (50 surveys), Ilkley (50 surveys), Keighley (100 surveys) and Shipley (50 surveys).

Business Survey/Online of Current Occupiers

4.07 To complement the survey work undertaken by NEMS Market Research, WYG also completed a Business Survey in October 2012 of all businesses within the main five town centres. This survey



explored the current strengths and weaknesses from a business operator's perspective. A copy of the questionnaire and summary of results are contained at **Appendix 6**. The main results can be found in the vitality and viability assessment for each of the five town centres in **Appendix 1**.



- District Centres**
- A Five Lane Ends District Centre
 - B Gillington District Centre
 - C Great Horton District Centre
 - D Greensington District Centre
 - E Mayo Avenue District Centre
 - F Thornbury District Centre
 - G Tong Street District Centre

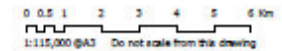
- Local Centres**
- | | | |
|-----------------------------|---------------------------------|----------------------------------|
| 1 Addingham | 18 Ecksell | 35 Lidget Green |
| 2 Skiden | 19 Undercliffe | 36 Princeville |
| 3 Staxton with Eastburn | 20 Oak Lane Manningham | 37 Horton Grange |
| 4 Burley in Wharfedale | 21 Duckworth Lane | 38 Marshfields - Manchester Road |
| 5 Miratton | 22 Carlsale Road - Whetley Hill | 39 Bankfoot - Manchester Road |
| 6 Fell Lane & Oakworth Road | 23 White Abbey Road | 40 Wibsey |
| 7 Fiddesden | 24 Heaton | 41 Berkerend Road |
| 8 Crossfields | 25 Allerton | 42 Leeds Road |
| 9 Seakon | 26 Sandy Lane | 43 Labsterdyle |
| 10 Oakworth | 27 Thornton | 44 Skidder Lane |
| 11 Haworth - Main Street | 28 Claydon | 45 Hains Wood |
| 12 Haworth - Mill Hey | 29 Queensbury | 46 Low Moor |
| 13 Cross Road | 30 Herdian | 47 Wylie |
| 14 Salfaire | 31 Cullingworth | B Bolton Junction |
| 15 Idle | 32 Wilsden | C Buttershaw |
| 16 Whose | 33 Cottingley | D Blöwick |
| 17 Firsinghall | 34 Denholme | E Shearbridge - Lister Hills |



**Bradford Retail & Leisure Study
Overview Plan 0**

Key

- City Centre
- Town Centre
- District Centre
- Local Centre
- Survey Zones
- Bradford Metropolitan District



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A077745 Overview Plan with Postcode Sectors May 2013.rxd

May 2013

2nd Floor, Longsight Court, 47 Newport Road, Cardiff, CF24 0AD
Tel: +44 (0) 29 2082 9200 Fax: +44 (0) 29 2045 5321
Email: info@wyg.com www.wyg.com

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5.0 SUMMARY OF THE VITALITY AND VIABILITY OF THE PRINCIPAL CENTRES

- 5.01 The National Planning Policy Framework (NPPF) (March 2012) states that local authorities should set out policies for the management and growth of centres over the plan period. The NPPF requires local authorities to recognise town centres as the heart of their communities and to pursue policies that support their viability and vitality. It is recognised that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and to reflect the individuality of town centres.
- 5.02 The NPPF does not provide a list of indicators to be used to assess the health of a centre. However, the former Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth (December 2009) did include a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time. Although PPS4 has been superseded by the NPPF and no longer forms part of national planning policy guidance, the key indicators included in PPS4 remain relevant. In the absence of guidance in the NPPF with regard to key indicators, WYG advise that the former PPS4 indicators are a useful tool in assessing the health of centres. The performance indicators outlined in the former PPS4, which will subsequently be referred to as the agreed indicators, comprised the following:
- **Diversity of main town centre uses (by number, type and amount of floorspace):** data on the diversity of uses in the five centres was taken from the previous Bradford Study (2008);
 - **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** consideration has been given to the scale of out-of-centre retail provision in the centres;
 - **The potential capacity for growth or change:** from a review of the opportunities available in each of the centres;
 - **Retailer representation and retailer demand:** derived from Venuescore's UK Shopping Venue Rankings;
 - **Shopping rents – the average Zone A rents paid in centres:** derived from available published data;
 - **Proportion of vacant street level property:** derived from land-use surveys;
 - **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from Valuation Office Agency data;



- **Pedestrian flows:** from on-site observations;
- **Accessibility:** from WYG’s assessment, and from shopper and business surveys;
- **Perception of safety and occurrence of crime:** from various surveys and ‘on-the-ground’ observations; and
- **State of town centre environmental quality:** from ‘on-the-ground’ observations and survey results.

5.03 The commentary below provides an overview of our analysis of the health of the five principal centres, namely Bradford, Keighley, Ilkley, Bingley and Shipley, with particular reference to their performance over time. The commentary is supplemented by a more detailed appraisal of available data pertaining to the centres’ performance and WYG’s observations in surveying each centre. The comprehensive appraisal provides full details of published data sources such as Venuescore, FOCUS and the Valuation Office Agency (VOA). The summary provided below considers the principal centres, with the full versions of the health check analysis set out in **Appendix 1**.

5.04 **Table 5.1** provides a summary of the total number of units and floorspace within each centre. This is based on each of the six Goad categories: convenience, comparison, retail services, leisure services, financial/business services and vacancies. Bradford is the principal centre in the district and this is reflected by the centre having the largest number of units and floorspace. Bingley contains the least number of units and floorspace of the five centres.

Table 5.1: Summary of the Centres

Centre	Total No. of Outlets	Total Amount of Floorspace (Sq.m)
Bradford city centre	449	99,340
Keighley town centre	391	83,940
Ilkley town centre	245	37,880
Shipley town centre	197	39,730
Bingley town centre	124	20,060

Source: Site Visit, March 2012 – Experian Goad

Nb. Figures for Bradford city centre are based on the defined Bradford city centre Central Shopping Area from the Bradford Replacement UDP Proposals Map. Figures for Keighley, Ilkley and Shipley town centre are based on the town centre as defined by Goad. Figures for Bingley town centre are based on the defined Bingley town centre Boundary from the Bradford Replacement UDP Proposals Map.

5.05 **Tables 5.2** and **5.3** show the diversity of uses within each of the five centres surveyed by Goad definitions. **Table 5.2** shows that the proportion of convenience units in all of the five centres is



below the national average. Bradford city centre and Ilkley town centre are well represented in terms of comparison units, with the proportion of units greater than the national average. All of the centres, except for Bradford, have a proportion of retail service units which is greater than the national average. Shipley and Bingley town centres are well represented in terms of leisure services, with the proportion of units being equal to or greater than the national average. All of the centres are well provided for in terms of financial and business services. The proportion of vacant units in Ilkley town centre is substantially below the national average, whereas in the other four centres the proportion is greater than the national average. Bradford has the highest proportion of vacant units.

Table 5.2: Diversity of Uses - Units

Centre	% Convenience Goods Units	% Comparison Goods Units	% Retail Service Units	% Leisure Service Units	% Financial/ Business Service Units	% Vacant Units
Bradford city centre	5.3%	36.7%	10.9%	14.0%	13.4%	19.6%
Keighley town centre	7.2% (7.2%)	32.7% (33.0%)	15.6% (15.7%)	17.9% (18.0%)	10.0% (10.1%)	16.6% (16.0%)
Ilkley town centre	7.8%	38.8%	16.3%	20.0%	11.0%	6.1%
Shipley town centre	5.6%	29.9%	13.7%	21.8%	12.2%	16.8%
Bingley town centre	4.8% (4.9%)	25.0% (25.2%)	15.3% (15.4%)	23.4% (23.6%)	15.3% (15.4%)	16.1% (15.4%)
Centres Average	6.1%	32.6%	14.4%	19.4%	12.4%	15.0%
UK Average*	8.1%	33.3%	13.4%	21.8%	10.9%	12.2%

Source: Site Visit, March 2012, *UK Average Figure, Goad, January 2012 (taken from Full Category Report averages).

Nb. Figures for Bradford city centre are based on the defined Bradford city centre Central Shopping Area from the Bradford Replacement UDP Proposals Map. Figures for Keighley, Ilkley and Shipley town centre are based on the town centre as defined by Goad. Figures for Bingley town centre are based on the defined Bingley town centre Boundary from the Bradford Replacement UDP Proposals Map.

Figures in brackets indicate the diversity of uses omitting the former Damside car park and two former Leeds College buildings in Keighley and the former Bradford and Bingley office building in Bingley.

5.06 **Table 5.3** shows that the proportion of convenience floorspace in Keighley, Ilkley and Shipley town centres is substantially above the national average figure, whereas Bradford and Bingley are under-represented in terms of convenience floorspace. Bradford is the only one of the five centres to have a proportion of comparison floorspace which is greater than the national average figure. Ilkley and Shipley are well represented in terms of retail services floorspace, while the proportion of retail services floorspace in Bradford, Keighley and Bingley is lower than the national average. Bingley, Ilkley and Keighley's proportion of leisure floorspace is greater than the national average, while all of the centres, except Keighley, have a proportion of financial/business services floorspace which is above



the national average. The proportion of vacant floorspace in Ilkley and Shipley is below the national average, while in Bradford, Keighley and Bingley the proportion of vacant floorspace is greater than the national average.

Table 5.3: Diversity of Uses – Floorspace

Centre	% Convenience Goods Floorspace	% Comparison Goods Floorspace	% Retail Service Floorspace	% Leisure Service Floorspace	% Financial/ Business Service Floorspace	% Vacant Floorspace
Bradford city centre	12.6%	46.2%	3.7%	11.1%	10.2%	16.2%
Keighley town centre	23.1% (24.9%)	36.6% (39.5%)	5.5% (5.9%)	14.5% (15.7%)	5.6% (6.1%)	14.7% (7.8%)
Ilkley town centre	23.3%	29.1%	8.0%	23.3%	11.8%	4.6%
Shipley town centre	23.8%	24.3%	8.2%	24.0%	10.0%	9.8%
Bingley town centre	7.2% (8.5%)	17.9% (21.1%)	5.7% (6.8%)	28.9% (34.0%)	11.5% (13.5%)	28.8% (16.1%)
Centres Average	18.0%	30.9%	6.2%	20.4%	9.8%	14.9%
UK Average*	14.2%	36.9%	7.1%	22.6%	8.4%	10.1%

Source: Site Visit, March 2012, *UK Average Figure, Goad, January 2012 (taken from Full Category Report averages).

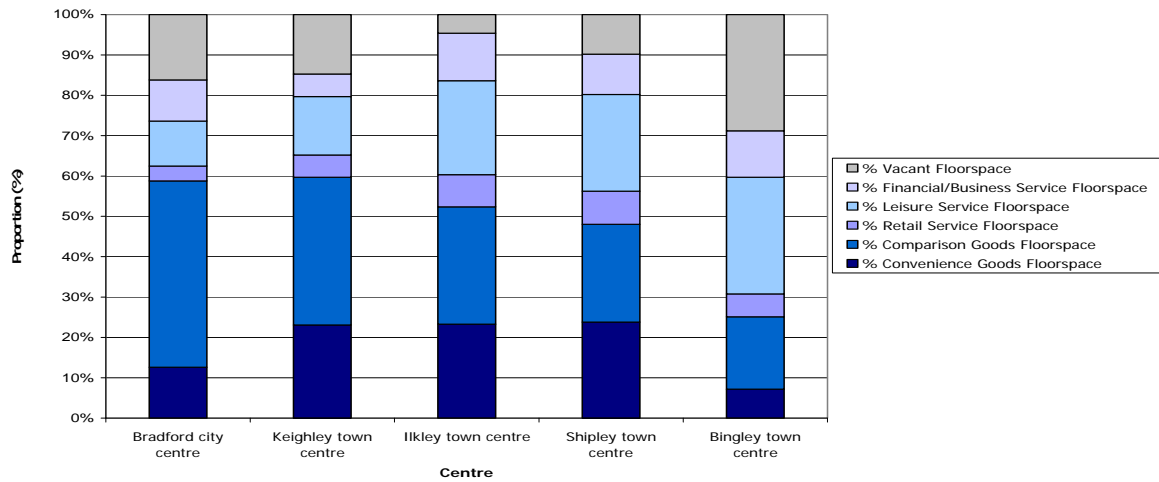
Nb. Figures for Bradford city centre are based on the defined Bradford city centre Central Shopping Area from the Bradford Replacement UDP Proposals Map. Figures for Keighley, Ilkley and Shipley town centre are based on the town centre as defined by Goad. Figures for Bingley town centre are based on the defined Bingley town centre Boundary from the Bradford Replacement UDP Proposals Map.

Figures in brackets indicate the diversity of uses omitting the former Damside car park and two former Leeds College buildings in Keighley and the former Bradford and Bingley office building in Bingley.

5.07 **Figure 5.1** shows the proportion of retail floorspace based on the six Goad sub-categories within each of the centres surveyed.

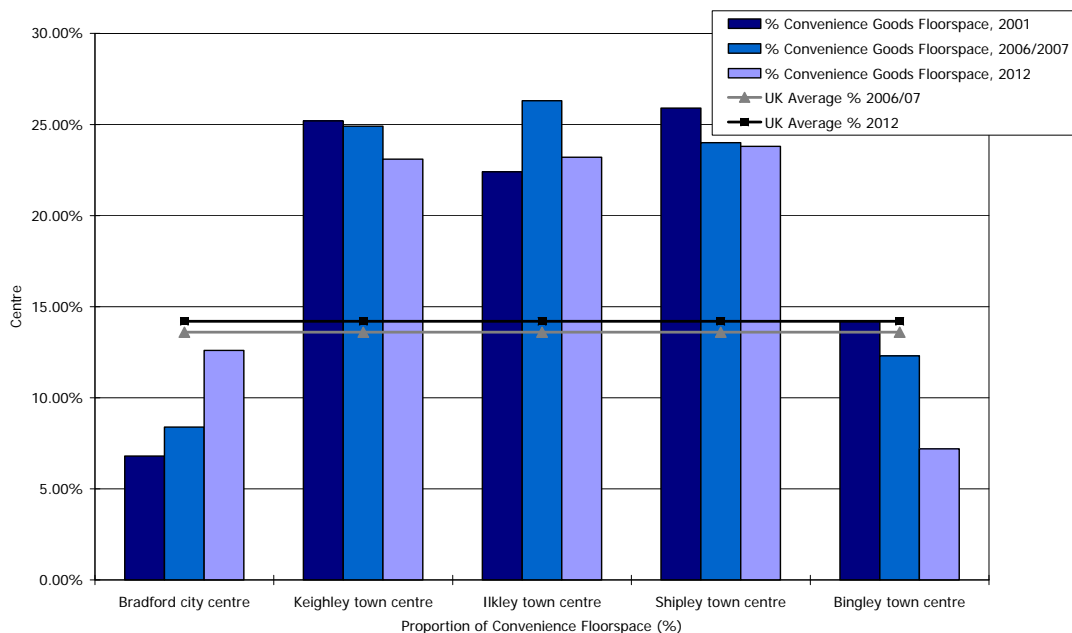


Figure 5.1: Proportion of Retail Floorspace based on Good Sub-Categories



5.08 **Figure 5.2** shows the change in the proportion of convenience goods floorspace between 2001 and 2012. Bradford city centre is the only centre to have seen a steady increase in the proportion of convenience goods floorspace, increasing from 6.8% in 2001 to 12.6% in 2012. The proportion of convenience goods floorspace in Ilkley has increased from 22.4% in 2001, to 23.2% in 2012. This proportion is less than the peak in the proportion of convenience goods provision (26.3%) which was reached in 2007. The proportion of convenience goods floorspace in Keighley, Shipley and Bingley has decreased since 2001, with Bingley having witnessed the largest decrease of 7 percentage points.

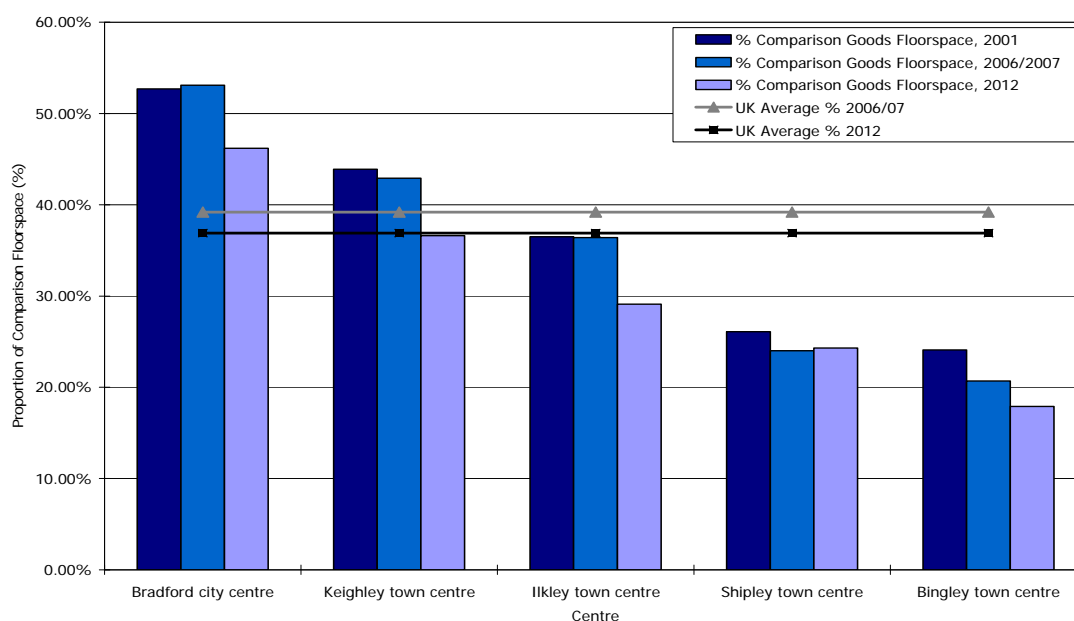
Figure 5.2: Proportion of Convenience Goods Floorspace (2001-2012)





5.09 The change in the proportion of comparison goods floorspace between 2001 and 2012 is shown at **Figure 5.3**. All of the five centres have seen a decrease in the proportion of comparison goods floorspace since 2001. The largest decrease in the proportion of comparison goods floorspace has been in Ilkley and Keighley town centres which have seen a decrease of 7 percentage points. The smallest decrease in comparison goods floorspace has been in Shipley town centre, where there has been a decrease of 1.8 percentage points.

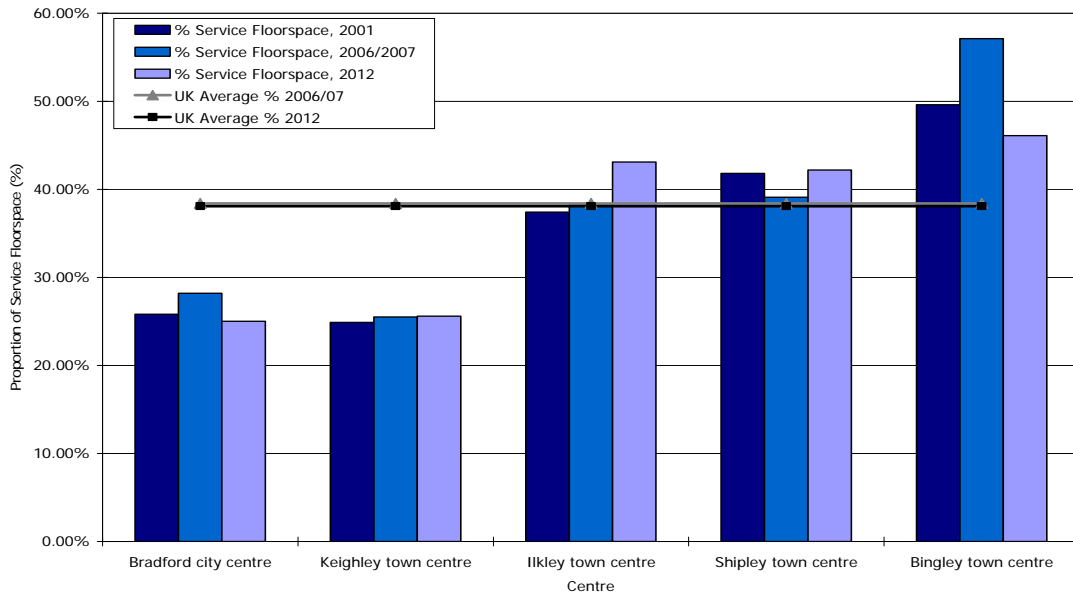
Figure 5.3: Proportion of Comparison Goods Floorspace (2001-2012)



5.10 **Figure 5.4** shows the change in the proportion of service floorspace (retail services, leisure services and financial/business services) between 2001 and 2012. Ilkley, Keighley and Shipley town centres have witnessed an increase in the proportion of service floorspace, with the largest increase in Ilkley (5.7 percentage points). Bradford has seen a small decrease in the proportion of service floorspace (0.8 percentage points), while the proportion in Bingley has decreased by 3.5 percentage points.



Figure 5.4: Proportion of Service Floorspace (2001-2012)

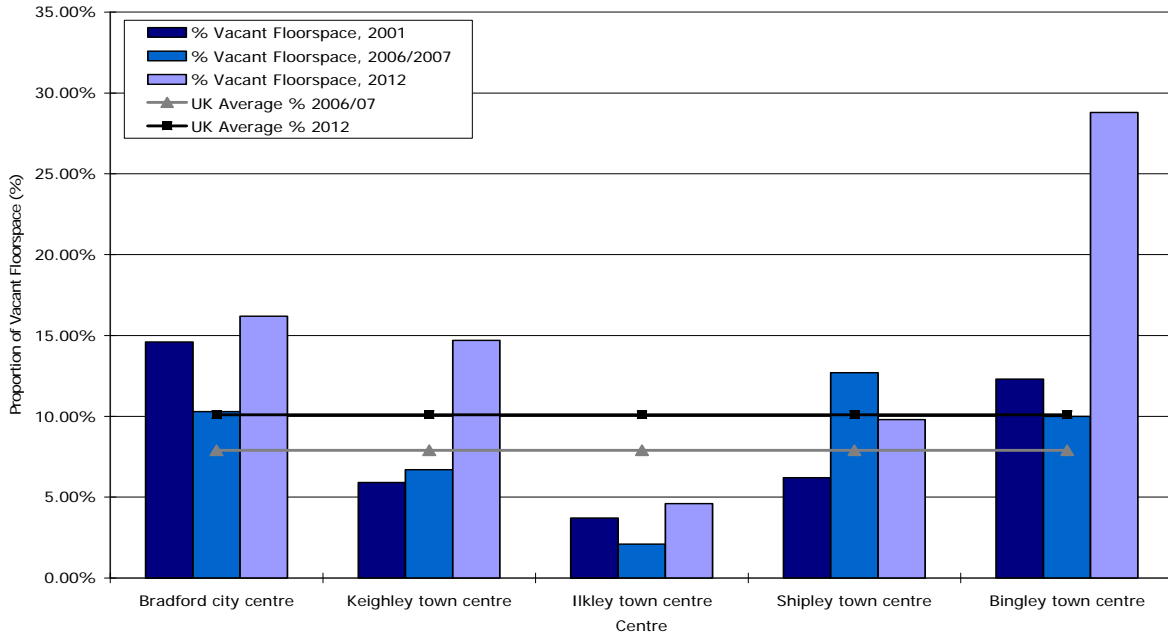


5.11 The change in the proportion of vacant floorspace between 2001 and 2012 is shown in **Figure 5.5**. There has been an increase in the proportion of vacant floorspace in all of the five centres since 2001. Bingley has seen the greatest increase in the proportion of vacant floorspace over this period, from 12.3% to 28.8%²³ (an increase of 16.5 percentage points). The smallest increase in the proportion of vacant units has been in Ilkley town centre, where the percentage of vacant units has only increased marginally, from 3.7% in 2001 to 4.6% in 2012. When looking at the change in the proportion of vacant units for the period 2006 to 2012, Shipley is the only centre where there has been a decrease in the proportion of vacancies.

²³ Figure includes the former Bradford and Bingley office building (3,030 sq.m). If this building is omitted the proportion of vacant floorspace is 13.7%.



Figure 5.5: Proportion of Vacant Floorspace (2001-2012)



5.12 In Bradford city centre, the largest vacant units within the defined Central Shopping Area (CSA) are the former TJ Hughes unit (3,090 sq.m) and the former Market Hall on Rawson Road (1,560 sq.m). There are also a number of large vacant units to the south of the CSA, including several at the Centenary Square leisure scheme and the former Odeon Cinema unit on Princes Way (3,110 sq.m) which was also recorded as being vacant in 2006/2007. Of the vacant units present in the centre, 61% are below 150 sq.m.

5.13 The size of vacant units in Keighley town centre varies from 20 sq.m to 2,620 sq.m. However, the three largest units are the former Damside car park and the former Leeds (Keighley) College buildings on Cavendish Road and North Street. These large non-retail units are clearly influencing the overall vacancy figures. If these three buildings were omitted from the vacancy calculation, the vacant floorspace would be 6,080 sq.m (7.8%) which is below the national average (10.1%).

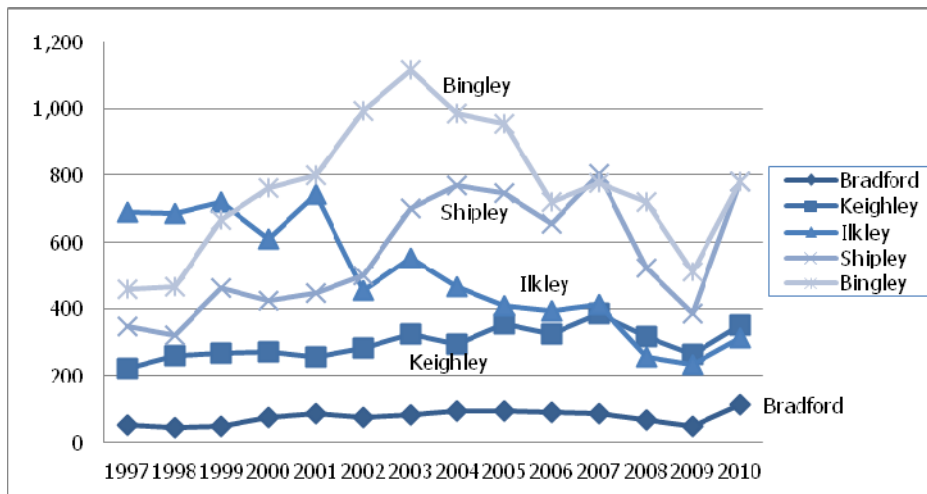
5.14 In Ilkley town centre there are only three vacant units within the defined Primary Shopping Area which collectively comprise a total floorspace of 250 sq.m. The largest vacant unit in the wider town centre has a floorspace of 350 sq.m. Notwithstanding the low level of vacancies in Ilkley, the proportion of vacant floorspace has doubled in the last six years and therefore this situation should be monitored.



- 5.15 In Shipley town centre, the vacant units range in size from 20 sq.m to 650 sq.m. The majority of vacancies in Shipley are located outside the Primary Shopping Area in secondary locations.
- 5.16 WYG consider the vacancy level for Bingley to be artificially inflated at present, as the 28.8% vacant floorspace currently includes the former Bradford and Bingley office building (3,030 sq.m) which is the subject of an extant planning permission for the redevelopment of the site to form a Sainsbury's store. If this floorspace were omitted from the vacancies calculation, the total vacant floorspace in Bingley town centre would be 2,740 sq.m (13.7%). Two of the units which were identified as vacant in May 2005, namely 123 Main Street and 3 Wellington Street remain vacant in March 2012. However, 123 Main Street has been occupied by Co-op between these dates, demonstrating that there is a recycling of vacant space.
- 5.17 Focus reports for the five centres have been reviewed to determine their retail ranking (based on retailer demand) between 1997 and 2010. It is noted that the level of retailer demand in a centre can reflect its retail offer, for example the provision of high quality and modern retail units is likely to attract greater levels of retailers, particularly national operators. It is evident from **Figure 5.6** that between 2009 and 2010, each of the centres has experienced a reduction in their retail ranking, with Shipley and Bingley being the centres which have performed the most poorly during this period. Bradford, Keighley and Ilkley have the highest overall retail ranking, with Bradford ranked 113th in 2010. Ilkley has experienced a notable improvement in its ranking over the period, indicating that it has gradually increased its level of national multiple retailers. Bingley experienced a clear decline in its retail ranking between 1997 and 2003, though it later improved and reached a peak of 511 in 2009, which may be attributable to the completion of the 5Rise Shopping Centre scheme in the town.

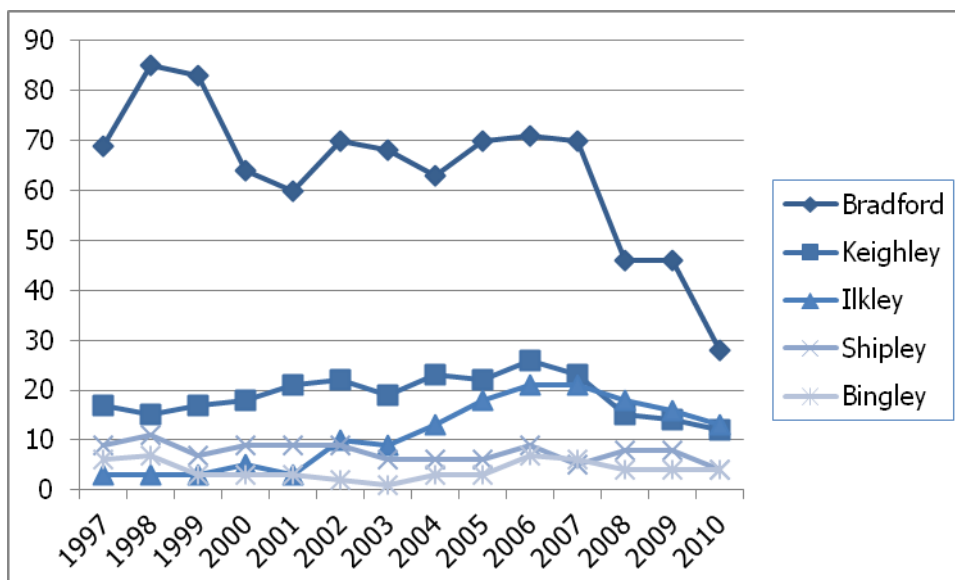


Figure 5.6: Retail Ranking



5.18 The Focus reports for the five centres also show the number of retailers who are actively seeking representation in each of the centres. **Figure 5.7** shows that the number of retailers seeking to locate in Bradford city centre is significantly higher than those in the smaller town centres of Keighley, Ilkley, Shipley and Bingley. Between 1997 and 2007, Ilkley experienced the greatest increase in retailer requirements. However, comparable with the other four centres and wider national trends, there has since been a decline. It is recognised that the post-2007 recession has reduced the number of retailers who are seeking to expand nationally, with many operators (including Thornton's, Mothercare and HMV) reducing their existing portfolio of stores.

Figure 5.7: Retailer requirement





Bradford City Centre

- 5.19 Bradford is located to the south-east of the defined Study Area and within Zone 14. As noted in the Core Strategy Further Engagement Draft (October 2011), the city centre is the main focus for economic, educational, administrative and cultural activity within the district. It is ranked as a Regional centre by Venuescore (2011), and is within the top 5% of all UK shopping venues. It is located approximately 17km to the west of Leeds city centre and 13km to the north east of Halifax town centre.
- 5.20 The survey of Bradford city centre in March 2012 identified that there was a total of 449 units within the RUDP-defined Central Shopping Area of Bradford, comprising a gross floorspace of 99,340 sq.m. The survey also reviewed the diversity of units in locations on the edge and outside the centre, namely the retail parks at Forster Square, Singleton Street, Manningham Lane and Peel centre Retail Parks.
- 5.21 The pedestrianised area of Darley Street, Kirkgate, Bank Street and Ivegate accommodate the majority of the retail and service units in the centre, with additional stores also located on several other key routes, including John Street, Rawson Road and James Street. In terms of the diversity of uses in Bradford, the city centre is well provided for in terms of the number and amount of comparison and financial and business service units. However, in comparison with the respective national average figures, there is an identified shortfall in the provision of convenience, retail service and leisure service operators. In terms of vacancy rates, Bradford is performing poorly, with both the proportion of units and vacant floorspace above the UK average figures. The vacant units are dispersed throughout the centre and vary in size from 10 sq.m to 3,090 sq.m. Whilst the number of vacant units in Bradford city centre has decreased by two units since the previous BRLS (2008) was undertaken, the amount of vacant floorspace has increased by 6,010 sq.m to 16,140 sq.m. 22 of the vacant units were also identified as vacant in the previous Study, highlighting that some of the vacancies are long-term. However, it should be noted that some of these units may have been occupied between these dates showing positive recycling of space.
- 5.22 The health check indicators as outlined in Paragraph 5.02 have been assessed and they identify that Bradford city centre is performing relatively well and has a good provision of retail and leisure services. There have been several new developments in the city, notably the City Park south of the defined Central Shopping Area, the Travelodge Hotel on Mill Street which opened in May 2012, the Southgate complex which includes a new headquarters for Provident Financial and Jurys Inn Hotel



which opened in 2011, and the Premier Inn Hotel, Vicar Lane which opened in 2011. The new Tesco Express store on Sunbridge Road and the refurbishment of the Morrisons store on Westgate provide an improved level of convenience floorspace in the centre. Public realm improvements have also taken place to a number of shopping streets including Darley Street, Bank Street, Tyrrel Street, Huslergate which were completed in 2010, while improvements are currently taking place to Ivegata and Upper Millergate. Similarly, the high level of vacancies in Bradford also adversely affect its environmental quality, with the closure of the TJ Hughes building in particular, making this area appear run-down. In contrast, the four Retail Parks to the north of the centre accommodate a strong provision of national operators which appear to be trading well.

- 5.23 Since the previous BRLS was undertaken in 2008, there have been a number of changes in Bradford city centre. The number of convenience, comparison and financial and business service units in the centre has decreased by six, sixteen and three units respectively. The number of retail service units has increased by two units and there is one additional leisure service unit. The number of vacant units has decreased by two since 2008.
- 5.24 The results of the in-street and business surveys (full details of which are provided at Appendix 1) are useful in providing an insight into the views and behaviour of customers, residents and businesses, including their perceptions of Bradford city centre. The results of the in-street survey show that most people who visit Bradford do so for convenience as it is close to their home (31%) or work (14%). Those visiting Bradford only tend to stay in the city centre for a short time, with 48% of respondents to the in-street survey only planning to stay for up to two hours. This perhaps shows that the offering of the city centre is failing to retain visitors for a substantial amount of time. The majority (56%) of those surveyed did not visit Bradford in the evening which shows that the city centre's night time economy may need improvements.
- 5.25 Respondents to the in-street survey suggested a number of improvements which could be made to the city centre, these included more department stores (26%), more clothing stores (22%), improved cleanliness (20%) and the filling of empty shops (17%). The majority of respondents to the survey found Bradford to be performing 'about the same as' other centres in a number of respects, for example, the quality of shops and range of banks/financial services. However, areas where respondents felt Bradford was performing worse than other centres included choice of shops (32%) and choice of High Street names (30%).



- 5.26 The responses provided to the business survey provide an insight into the views of business in the city centre. Similarly to the responses received to the in-street survey, business suggested an increased choice/range of shops and a new department store as improvements which could be made in the city centre. A lack of passing trade, the quality of the city centre shopping environment and high rents/rates were identified by businesses as key barriers to trading performance. The delays associated within the implementation of the Westfield Broadway Centre scheme was identified by the majority of businesses (68%) as having a direct impact on their business. However, the results show that there is still significant support for the Westfield Broadway Centre to be implemented.
- 5.27 To summarise, Bradford accommodates a good provision of retailers, though it is noted that there should ideally be a higher proportion of national operators in the city centre to reflect its key role as a Regional centre. Whilst its retail ranking has improved by two places between 2006 and 2011, other indicators (including the level of retailer demand and retailer requirements) show that the city centre has experienced some decline in recent years.

Keighley Town Centre

- 5.28 Keighley is the second largest settlement in Bradford district. It is situated to the north-west of the defined Study Area within Zone 5 and is located approximately 16km to the north west of Bradford city centre and 32km west of Leeds city centre. Keighley is ranked as a Major district by Venuescore (2011).
- 5.29 Keighley town centre's main shopping area is focused on the Airedale centre and the surrounding shopping streets which include Low Street, North Street, East Parade and Cavendish Street. Additional retail and service units are located on Hanover Street, High Street, Bow Street, Church Street, Market Place, Market Street, Church Way, Bridge Street and Lawkholme Lane. Cavendish Retail Park provides a number of large format retail units in the town centre and can be accessed from Cavendish Street. Keighley also offers an indoor market which is situated on Low Street.
- 5.30 A site visit of Keighley town centre was undertaken in March 2012 which identified that there were a total of 391 units in the town centre as defined by GOAD, equating to 83,940 sq.m gross floorspace.
- 5.31 In terms of the diversity of uses in Keighley, the town centre is well provided for in terms of convenience floorspace. However, the number of convenience units is slightly below the national average figure. The town is under-provided for in terms of leisure service operators, with the amount



of financial and business provision slightly below the national average. However, the number of comparison and retail service operators in the town is comparable to the national average.

- 5.32 The number of vacant units and the amount of vacant floorspace in Keighley town centre is above the UK national average. However, the vacancy figure includes two former Leeds College (Keighley campus) buildings and a large car park on Damside. If these premises are excluded from the vacancy figures, the amount of vacant floorspace in Keighley town centre is below the national average. There are some long-term vacant units present in the town centre. For example, 24 of the vacant units present in the centre were also vacant at the time of the previous BRLS (2008).
- 5.33 Since the previous BRLS was undertaken in 2008, there have been a number of changes in Keighley town centre. There has been a substantial decrease (24) in the amount of comparison units in the centre along with a decrease in convenience units (6), while there has been an increase in retail service units (8) and leisure units (5). The number of vacant units has increased by 7 (4 excluding the Leeds College buildings and Damside car park).
- 5.34 The results of the in-street and business surveys undertaken in Keighley (full details of which are provided at Appendix 1) are useful in understanding the visitors, residents and businesses' views of Keighley town centre. The in-street survey found the main reason for people being in Keighley town centre was to visit the bank/building society (17%), to visit Morrisons (12%) or to browse (11%). The majority of people visiting Keighley did not plan to stay for a substantial amount of time, with 62% intending to stay for less than 2 hours. The survey found Keighley Market Hall to be a popular destination, with 47% of respondents intending to visit the market on their trip. The areas where respondents considered that Keighley town centre was performing worse than other centres included the choice of high street names (41%), choice of shops (34%) and choice of independent shops (34%). When suggesting how Keighley town centre could be improved, 13% considered Keighley would benefit from a general facelift and a further 13% considered improved cleanliness would be beneficial.
- 5.35 Businesses responding to the business survey rated the public transport provision in Keighley town centre highly, however most respondents considered the price of car parking to be poor. The number of supermarkets and number of services in the town centre were also rated highly by respondents. In terms of improvements to the centre the highest proportion of respondents identified that there should be an increased range/choice of shops, which reinforces the in-street survey results. A high proportion of respondents considered that marketing assistance would help to support their business.



- 5.36 Keighley town centre exhibits a number of positive signs in relation to the health check indicators. The town centre is well represented in terms of both national and independent retailers. Visits to Keighley found the town to be busy, with good accessibility. There has been a gradual fall in commercial yields since 2008 indicating an increase in investor confidence. Expansion of the town centre has taken place with the construction of the new Asda store and the new Leeds College (Keighley Campus) on Bradford Road. Further expansion is earmarked with the development proposals for the Worth Valley Shopping Centre on East Parade which will provide a range of comparison goods retail units and an eight screen cinema, along with the potential for other leisure uses.
- 5.37 Notwithstanding these positive indicators, the town centre's position in the hierarchy of shopping centres has declined since 2006 (dropping 33 places to a ranking of 254), which has coincided with fluctuating retailer demand, a reduction in retailer requirements and shopping rents.

Ilkley Town Centre

- 5.38 Ilkley is located to the north of the defined Study Area, within Zone 3. It is located approximately 22 km to the north of Bradford city centre and 28km from Leeds city centre. The town is ranked as a district centre by Venuescore (2011).
- 5.39 The site visit in March 2012 identified that the 245 units within the town centre comprise a total floorspace of 37,880 sq.m.
- 5.40 The Primary Shopping Area of Ilkley, as defined in the RUDP Proposals Map, is concentrated along Brook Street, Grove Promenade and The Grove. The RUDP also identifies a wider Central Shopping Area (CSA) which encompasses some additional streets, notably: Leeds Road, Church Street and Station Road. Whilst Brook Street accommodates the majority of national operators in Ilkley, for example, Boots, Costa, the Co-op, Dorothy Perkins and Thomas Cook, there is also a strong proportion of high quality independent retailers in the centre, reflecting its role as a key tourist destination.
- 5.41 There is a strong level of convenience, comparison, retail service and leisure service operators in the town centre, with the Booths, Marks and Spencer Simply Food, Boyes and Tesco stores acting as the key anchor foodstores. The consented scheme for a new Tesco store on Railway Road will also create an additional gross floorspace sales area of 2,484 sq.m, with the opening of the new M-local format store in July 2011 also creating additional convenience goods floorspace. Vacancy levels in the town



centre are less than half the respective national average rates, though there has been a clear increase (8 units) in vacancies since the March 2007 survey.

- 5.42 The results of the in-street and business survey (full details of which are provided at Appendix 1) show that most (29%) people choose to visit Ilkley due to the shopping environment, with the main reason (35%) for respondents being in Ilkley on the day of the survey being to browse. The majority of respondents to the survey consider that Ilkley town centre performs better than other centres in relation to several factors, including general environment (84%), cleanliness (80%), quality of shops (79%) and independent shops (77%). The main area where respondents considered Ilkley to perform worse than other centres was car parking provision (39%) and car parking prices (28%). However, this contradicts an earlier question to which the majority of those travelling to Ilkley by car stated that they were satisfied with car parking costs and had no difficulty parking. When asked how Ilkley town centre could be improved, 28% suggested reducing traffic congestion and 20% suggested more parking.
- 5.43 Respondents to the business survey suggested a number of measures to improve Ilkley; these included more independent traders, a better mix of short/long stay parking and greater promotion of the centre. It is interesting that the businesses suggest more independent shops would improve the centre, given that the majority of respondents to the in-street survey consider that Ilkley performs better than other centres in this regard. However, it is likely to be the case that businesses in the centre want to maintain and enhance the number of independent shops. Respondents to the business survey rated Ilkley's public realm highly.
- 5.44 Since the BRLS (2008), there has been a decline in the number of convenience and comparison units in the town centre, whilst there has been an increase in the level of retail and leisure service operators. The health check has identified that although Ilkley experienced a decline in its rankings by 14 places between 2006 and 2011 (from 583 to 569), several other indicators show that the town centre is performing well and continues to provide an attractive shopping environment for local residents and visitors.

Shipley Town Centre

- 5.45 Shipley is situated to the centre of the defined Study Area, within Zones 16 and 17. It is ranked as a Minor district centre by Venuescore (2011). The centre performs an important role in catering for the local needs of the catchment to the north of Bradford city centre. The town centre is located



approximately 5km to the north of Bradford, 13km to the east of Keighley and 20km to the west of Leeds.

- 5.46 The main shopping area in the town is concentrated on the pedestrianised area of Market Square and Well Croft. Further shopping provision is located on Market Street, Otley Road, Kirkgate, Briggate, Westgate and Commercial Street. An outdoor market is located in Market Square on Mondays, Fridays and Saturdays, while an indoor market is present between Kirkgate and Westgate.
- 5.47 Visits to Shipley town centre in March 2012 identified that there was a total of 197 units within the town centre as defined by GOAD, comprising a gross floorspace of 39,730 sq.m.
- 5.48 In terms of the diversity of uses in Shipley, the town centre is well provided for in terms of convenience floorspace. However, the number of convenience units is below the national average. This sector is dominated by the Asda store. There is an identified shortfall in comparison goods provision when compared to the national average figure, whereas the town centre is well provided for in terms of financial and business service units. The provision of retail and leisure services is comparable to the respective national average figures. Shipley performs well in terms of vacant floorspace which is below the national average figure. However, the number of vacant units exceeds the national average. This is due to the high proportion of small vacant units, with 79% of the vacant units present in the town centre having a floorspace of less than 150 sq.m. This indicates a lack of demand for small units in Shipley. Several of the vacant units in Shipley town centre are long-term vacancies; the Glenroyal buildings, 12 Commercial Street, 7 Arndale Shopping Centre and 16 Market Street were all vacant at the time of the previous BRLS (2008).
- 5.49 Since the BRLS (2008) was undertaken, the number of convenience, comparison and retail service units in Shipley has decreased. However, the amount of floorspace for each of these sectors has increased. Conversely, the number of vacant units has increased, while the amount of vacant floorspace has decreased. This perhaps indicates a demand for larger units from retailers. Both the number and amount of floorspace for leisure services and financial and business services has increased during this period.
- 5.50 The results of the in-street survey for Shipley (full details provide at Appendix 1) found the majority of respondents (57%) visited Shipley for convenience as the town was located close to their home. A high proportion of respondents indicated that the only planned to stay in Shipley for a limited time, with 80% planning to stay for only up to two hours. The majority of respondents to the survey



considered that Shipley performs 'about the same' as other centres in relation to a number of factors, including town centre environment (77%), range of banks/financial services (75%) and quality of shops (63%). However, several respondents rated Shipley as worse than other centres in terms of choice of independent shops (47%) and availability of cinemas (45%). There were no areas where the majority of respondents considered Shipley to compare better than other centres. The choice and range of non-food shops (14%), empty shops (10%) and poor appearance (10%) were mentioned by respondents as Shipley's biggest weaknesses.

- 5.51 The majority of businesses responding to the business survey stated that they would like to see an increased choice/range of shops and more car parking in Shipley, as well as a new department store, more independent traders and lower parking charges. When asked what they considered to be the main barriers to their trading performance, respondents to the business survey stated the inadequate amount of customer car parking, high rents/rates and the quality of the town centre environment.
- 5.52 The health check indicators show that Shipley town centre has a number of positive indicators. It has experienced an improvement in its retail ranking by 51 places between 2006 and 2011 and the centre has a reasonable mix of national and independent retailers for a centre of its size. Additionally, the commercial yield value of units in Shipley has gradually declined in recent years, showing an improvement in investor confidence.
- 5.53 However, Shipley town centre has also experienced some negative indicators, such as the town's retail ranking falling from 387th in 2009 to 782nd in 2010 and a fall in retailer requirements. The environmental quality throughout the town centre varies and it is apparent that a number of units are in need of investment and refurbishment. It is however understood that there is an increasing foodstore operator interest in Shipley.

Bingley Town Centre

- 5.54 Bingley is located to the centre of the defined Study Area, within Zone 6. Bingley town centre is identified as a Local centre by Venuescore (2011). The town centre is located 9km to the north west of Bradford, 24km to the west of Leeds and 8km to the east of Keighley.
- 5.55 The main shopping area of Bingley is linear in nature and extends along Main Street. The recently developed 5Rise Shopping Centre is located at the southern end of the centre. The survey of Bingley



town centre in March 2012 identified that there was a total of 124 units in Bingley town centre boundary (RUDP, October 2005), equating to a gross floorspace of 20,060 sq.m.

- 5.56 When looking at the diversity of uses in Bingley, it is evident that there is a shortfall in both convenience and comparison provision in the centre in terms of units and floorspace. However, leisure services and financial and business services are well provided for with the number of units and floorspace above the national average figure. The retail service provision in Bingley is comparable to the national average. Vacancies in Bingley town centre are above the national average, particularly in terms of the amount of vacant floorspace (5,770 sq.m, 28.8%). This high level of vacant floorspace can however largely be attributed to the inclusion of the former Bradford and Bingley office building (3,030 sq.m).
- 5.57 Since the BRLS (2008) was undertaken, the number of convenience, comparison and retail service units in Bingley town centre has declined slightly. At the same time, the number of financial and business services has increased by one unit and the amount of leisure services has remained stable.
- 5.58 The in-street survey results (full details provided at Appendix 1) found that the main reason for people being in Bingley on the day of the survey was to visit the Co-operative Food store (26%) and to visit Home Bargains (9%). The majority of respondents (85%) planned to stay in Bingley for less than two hours. Most respondents considered that Bingley performed worse than other centres in relation to the choice of high street names (79%), choice of shops (66%) and in relation to cinemas (75%). There were no aspects where the majority of respondents thought Bingley performed better than other centres. The majority of respondents (51%) would like a large supermarket in Bingley. The biggest weakness in Bingley was considered to be empty shops (34%) and foodstore provision (34%).
- 5.59 Respondents to the business survey identified that they would like to see an increased choice/range of shops, more independent/specialist traders, lower parking charges, more car parking and a better mix of short/long stay parking in the centre. When asked what were the biggest barriers to their trading performance, the main reason given by respondents were high rents/rates, the quality of the town centre environment and the lack of day visitors/tourists. A significant proportion of businesses (91%) stated that they believe the Sainsbury's (once implemented) will have a positive impact on the town centre.
- 5.60 Bingley town centre provides a varied retail offer. Modern retail accommodation is provided by the recently developed (opened December 2009) 5Rise Shopping Centre, which contrasts with the more



traditional buildings along Main Street. Although the centre has a limited number of national retailers, this is to be expected for a centre of its size. The recent investment in the centre (5Rise Shopping Centre) is positive, with further redevelopment happening in the near future with the introduction of a new Sainsbury's supermarket at the former Bradford and Bingley site. Although at the time of the survey there was a reasonable level of pedestrian activity around the 5Rise Shopping Centre, a number of vacant units remain in the development. It will be important for these vacancies to become occupied in order to strengthen the offer of the town centre.

5.61 Notwithstanding these positive indicators, Bingley town centre is identified to have declined in terms of its retail ranking (Venuescore). There are a limited number of retailers seeking representation in Bingley. However, the demand has remained stable over recent years. At the time of the survey, pedestrian activity at the northern end of Main Street was limited, perhaps indicating that the 5Rise Shopping Centre is drawing more activity to the southern end of Main Street.

Market Provision

5.62 There are a number of Council owned markets located within Bradford district, namely:

- The Oastler Centre, Bradford (176 stalls) – trades Monday to Saturday;
- The Kirkgate Shopping centre, Bradford (184 stalls) – trades Monday to Saturday;
- Keighley Market Hall, Low Street (85 stalls) – trades Monday to Saturday;
- Shipley Outdoor Market, Market Square (135 stalls) – trades on Monday, Friday and Saturday;
- and
- Bingley Outdoor Market, town Square (108 stalls) – trades Wednesday, Friday and Saturday.

5.63 In addition, there are several markets in the district owned by independent operators, including Shipley indoor market, Bradford Plaza at Thornbury district centre, Marlboro Hall in Carlisle Road local centre and Bradford Bazaar on Cemetery Road. In recent years, a number of illegally trading (without planning permission or a market licence) Asian Bazaars have opened in out-of-centre locations.

5.64 An analysis of the current vacancy rates at the existing city and town centre markets, compared to the vacancy rates at 2008, is a useful tool to measure the performance of the markets over time. The vacancy rate of the Kirkgate Market in Bradford city centre is 17%, with 32 of the 184 stalls recorded



as vacant in October 2012. At the Oastler Centre, the vacancy rate is also high at 19%, with 33 of the 176 stalls in the market vacant at October 2012. The vacancy rates of the city centre markets have increased since the BRLS (2008), at which time the vacancies across both markets at March 2008 were 7%. This increase in the proportion of vacant stalls has coincided with a decrease in the amount of footfall at these markets. Between August 2009 and July 2010, footfall at both city centre markets totalled 4.97m. However, between August 2011 and July 2012, footfall had fallen to 4.69m. A reduction of 280,000 visitors.

- 5.65 The vacancy rate at the Bingley open market has also increased since 2008. At November 2012 there were 53 vacant stalls at Bingley open market, a vacancy rate of 49.1%. The number of vacant stalls has increased by 37 stalls since 2008, at which time there were 16 vacant stalls and the vacancy rate was 14.8%.
- 5.66 The vacancy rates of the Keighley market and Shipley open market have remained relatively stable since 2008. The vacancy rate of the Keighley market is very low, with only one vacant unit present at November 2012, a vacancy rate of 1.2%. This is only a slight increase from 2008, when the Keighley market was fully let, with no vacant units. These figures indicate that the Keighley market is performing well. In Shipley, the vacancy rate for the open market has improved slightly since 2008. In 2008, there were 45 vacant stalls at the market, equalling a vacancy rate of 31.3%. The vacant rate at November 2012 had decreased to 30.4%, with 41 vacant stalls present. Although the number of vacant stalls has decreased, the vacancy rate remains high, showing that the market is struggling.
- 5.67 The in-street surveys asked respondents whether they were planning to visit a market on their visit to the city or town centre. The town where the highest proportion of respondents stated that they intended to visit the markets during their trip was Keighley, with 46% of respondents stating they would be visiting Keighley Market Hall. 35.3% of those who responded to the Bradford in-street survey stated that they planned to visit the Oastler Centre or Kirkgate Market during their trip to the city centre. The proportion of respondents was lower in Shipley, where 28% of respondents stated that they would visit Shipley outdoor market on their trip. Bingley had the lowest percentage of respondents, with 15% of respondents stating that they intended to visit Bingley outdoor market on their trip.
- 5.68 The vacancy and footfall figures detailed above show that there has been a decline in the performance of the markets in Bradford city centre and Bingley town centre since the BRLS (2008), while Shipley open market has suffered from a high vacancy rate since 2008. It is evident that the city centre



markets in particular are under threat from out-of-centre facilities, including illegally trading Asian Bazaars. In response, BMDC may want to consider consolidating the existing market facilities across the district, in order to create a stronger offer. WYG understand that BMDC have a Markets Strategy in place which aims to support the retention of successful and sustainable markets in the district. WYG would advise that such a strategy should be maintained and updated in order to support the district's market provision.

Conclusion

- 5.69 An analysis has been provided of the health of the five principal centres, namely Bradford, Keighley, Ilkley, Bingley and Shipley. Bradford city centre is the principal centre in the district and is well provided for in terms of the amount of comparison and financial and business service units. However, the centre is performing poorly in terms of vacancy rates, with some large and long-term vacant units identified in the centre which are having a negative impact on the environmental quality. There has been some investment in the city centre in recent years. However, Bradford is suffering from the effects of the economic downturn. The delay to the implementation of the Westfield Broadway Centre scheme, has impacting upon investor confidence, but recent announcements show that the scheme is progressing with considerable capital now being spent on implementing the project will improve local market conditions. Bradford would benefit from additional investment and the attraction of further national operators to the centre in order to strengthen the centre's role as a [Regional](#) centre.
- 5.70 Keighley town centre exhibits signs of a vital and viable centre. The town centre is well represented in terms of both national and independent retailers and it is evident that the town is a popular shopping destination. Keighley has benefitted from investment in recent years, with the construction of a new Asda store and the new Leeds College (Keighley Campus). Further expansion is earmarked following the planning consents for the Worth Valley Shopping Centre which will provide a range of comparison retail units, an eight screen cinema and the potential for other leisure uses and for bulky goods retail at the former George Farrar site on Bradford Road. The town centre would benefit from additional leisure and financial and business provision, and any rise in the number of vacant units in the centre should be carefully monitored.
- 5.71 Ilkley has a strong level of convenience, comparison, retail and leisure service provision. The town is a popular tourist destination, with the town centre offering a high proportion of high quality independent retail units and a favourable environmental quality. Ilkley is considered to be a vital and viable centre, exhibiting many of the signs of a healthy centre. Notwithstanding this, vacancies have doubled in the



town centre since the previous BRLS (2008) was undertaken and although this is reflective of the position in many centres following the economic downturn, the level of vacancies should be monitored.

- 5.72 There is currently an identified shortfall of comparison goods provision and convenience units within Shipley town centre and therefore the town would benefit from additional representation from these sectors. Although Shipley is performing well in terms of the level of vacant floorspace in the centre, there are a high proportion of small vacant units which are considered to be unattractive to end operators. Overall, Shipley is performing well in catering for local shopping needs, with the town centre exhibiting several positive signs of vitality. The town centre does however have some problems in terms of environmental quality and would benefit from further investment and the refurbishment of some units.
- 5.73 Bingley is a vital and viable centre. There has been investment in the centre in recent years with the development of the 5Rise Shopping Centre and further investment is expected in the near future following the granting of planning permission for a new Sainsbury's store in the centre, which will help to improve the identified shortfall in convenience goods provision in the centre. The town centre would also benefit from additional comparison goods provision. Bingley is suffering from vacancy levels above the national average and it will be important for these vacancy levels to be reduced in order that the health of the town does not decline. The presence of a new supermarket in the centre is likely to attract retailers to the town which may help to reduce the level of vacancies.



6.0 DISTRICT AND LOCAL CENTRES SUMMARY

Background

- 6.01 The National Planning Policy Framework (March 2012) emphasises the need for local authorities to monitor the health of their centres and determine how they are changing over time. The NPPF notes that the term 'centre' is applied to city, town, district and local centres, but that it 'excludes small parades of shops of purely neighbourhood significance.' The former Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth (December 2009) noted that district centres '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.' In addition, former PPS4 stated that local centres can '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.' The commentary below provides an overview of the analysis by WYG of the health of both the district and local centres across the district, drawing on the information gathered from the sites surveys and supplemented by desk-based research.
- 6.02 However over the plan period, where large scale residential development are being promoted, there may be opportunities to promote new local or district centres providing a mix of uses (including schools, and local shops and services) to support new residents in the district that can not necessarily be met at existing defined centres. Therefore in accordance with paragraph 38 of the NPPF, where practical and justifiable, there could be opportunities for new local retail and other key facilities as part of wider residential and economic growth areas in the district, namely in the Shipley and Canal Road Corridor regeneration area and the South East Bradford (Holme Wood) urban extension.

Methodology

- 6.03 The previous BRLS (2008) undertook a review of the retail provision and overall health of the district by examining a total of seven district centres (Five Lane Ends, Greengates, Girdlington, Great Horton, Mayo Avenue, Thornbury and Tong Street) and forty local centres. The recommendations from the Study were used to inform the Bradford Core Strategy Further Engagement Draft (October 2011), with a number of amendments made to the hierarchy of centres. In particular, Mayo Avenue district centre and four local centres were de-listed from the hierarchy. A total of 11 new local centres were also added to the hierarchy and since the production of the previous BRLS (2008), Odsal has been



identified as a new location for a district centre to serve South Bradford, and this is reflected in the Core Strategy.

6.04 This Study has reviewed the centres identified in the Core Strategy Further Engagement Draft. The health check analysis by WYG has also focused on an assessment of the performance of the seven district and 47 local centres in Bradford, as outlined in the Core Strategy Further Engagement Draft report (Policy EC5, October 2011). A comprehensive and detailed evidence base has been produced by WYG, with site visits conducted to each of the centres. WYG has also undertaken a review of those centres which were de-listed from the retail hierarchy, in order to determine whether these should still be allocated as centres. This ensured that up-to-date fascia and floorspace data of the units at ground floor level could be collected and analysed. The baseline information enabled WYG to assess the composition of each centre, with a record also taken of the vacant units. In addition to obtaining the diversity of use figure, the site visits also enabled WYG to undertake a 'mini' quantitative and qualitative health check assessment of each of the centres, using several of the indicators outlined in the former Planning Policy Statement (PPS) 4: Planning for Sustainable Economic Growth (2009). The current National Planning Policy Framework (NPPF) (March 2012) does not provide a list of indicators to be used to assess the health of a centre, however the former PPS4 set out a number of key indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time, as previously outlined in **Chapter 5**.

6.05 The commentary below is based on the more detailed appraisal of the relevant available information for the district and local centres, alongside a site plan, which is provided in **Appendices 2 and 3**.

District Centres

6.06 Table 6.1 provides a summary of the total number of units and amount of floorspace in the seven district centres and also the former Mayo Avenue Centre. It is evident that Girlington is the largest retail and service location in the area, both in terms of the number of units and the amount of floorspace within its boundary. It should be noted that the significant variation in the amount of floorspace between the district centres is as a result of all of the centres, with the exception of Great Horton, accommodating a retail park.



Table 6.1: Summary of the District Centres (August/September 2012)

District Centre	Total No. of Outlets	Total Amount of Gross Floorspace (Sq m)
Five Lane Ends	43	21,703
Girlington	80	25,220
Great Horton	59	7,304
Greengates	38	18,265
Thornbury	16	17,968
Tong Street	36	10,226
Odsal	-	-
Mayo Avenue (Former District Centre)	3	9,644

Source: Site Visit – August/September 2012

- 6.07 **Table 6.2** shows the proportion of the units based on the Goad sub-categories within each of the district centres. Thornbury contains the highest proportion of convenience units (including a Morrisons, Iceland and Asda), followed by Tong Street and Girlington which are all above both the Bradford district centre and national average figures. Although Table 6.2 indicates that there is a lack of convenience provision at Greengates, because it only accommodates two convenience stores, the centre does include a large Sainsbury’s and Asda outlet which are both trading well and which serve a wide catchment area. In terms of the proportion of comparison goods units, only Girlington has an above average level of comparison stores, with 28 units accounting for 35.0% of the units in the district centre. In comparison, Great Horton has a noticeably lower level of comparison goods provision, with the proportion of stores in the centre (16.9%) almost half the national average figure of 33.3%.
- 6.08 There is a good level of service outlets in each of the district centres, with Five Lane Ends, Greengates and Great Horton in particular having the highest proportion of retail, leisure and financial/business service operators. Whilst the lowest proportion (2.8%) of financial and business service sector provision is located in Tong Street, it is surprising that there is also a lack of financial and business services in Girlington (3.8%), particularly as it is the largest district centre.
- 6.09 In terms of vacancies, Great Horton, Girlington and Thornbury have the highest proportion of vacant units (and these are above the national average), although the overall average figure for the district centres (8.4%) is well below the national town centre average rate of 12.1%.



Table 6.2: Diversity of Use (Outlets) Figures (August/September 2012) – District Centres

August/September 2012	Convenience	Comparison	Retail Service	Leisure Service	Financial/Business	Vacant
	%	%	%	%	%	%
Five Lane Ends	9.3%	25.6%	25.6%	18.6%	11.6%	9.3%
Girlington	11.3%	35.0%	21.3%	16.3%	3.8%	12.5%
Great Horton	6.8%	16.9%	18.6%	30.5%	13.6%	13.6%
Greengates	5.3%	23.7%	21.1%	34.2%	10.5%	5.3%
Thornbury	25.0%	31.3%	6.3%	18.8%	6.3%	12.5%
Tong Street	13.9%	30.6%	19.4%	27.8%	2.8%	5.6%
Odsal	-	-	-	-	-	-
Mayo Avenue	33.3%	33.3%	33.3%	0.0%	0.0%	0.0%
Bradford District Centre Average*	15.0%	28.1%	20.8%	20.9%	6.9%	8.4%
UK Average**	8.0%	33.3%	13.4%	21.9%	10.9%	12.1%

Source: Site Visit – August/September 2012, * Excluding Odsal and Mayo Avenue, **UK Average Figure, Goad, June 2012

6.10 **Table 6.3** indicates the diversity of use (floorspace) within each of the centres surveyed and is based on the Goad sub-categories. Unsurprisingly, as all of the district centres (with the exception of Great Horton) contain retail parks, there is a high proportion of convenience and comparison floorspace in these centres. As a result, the proportion of service floorspace for these centres is significantly below the national average, with the exception of Tong Street which has a high percentage of leisure service floorspace as a result of the Gala Bingo unit within its district centre boundary.

6.11 Five Lane Ends has a high proportion of vacant floorspace (17.0%) in comparison to the national average (10.1%) which can be attributed to the closure of the large former DFS, JJB and Big Discount store units within the retail park. The vacancy rates for the rest of the district centres are all below the national average figure.



Table 6.3: Diversity of Use (Floorspace) Figures (August/September 2012) – district centres

August/September 2012	Convenience	Comparison	Retail Service	Leisure Service	Financial/Business	Vacant
	%	%	%	%	%	%
Five Lane Ends	45.2%	23.3%	4.4%	8.5%	1.7%	17.0%
Girlington	42.9%	37.3%	7.0%	8.6%	0.8%	3.5%
Great Horton	11.7%	16.5%	17.5%	25.8%	18.9%	9.6%
Greengates	28.1%	52.6%	4.6%	11.9%	2.4%	0.4%
Thornbury	50.2%	38.0%	0.3%	2.6%	0.3%	8.5%
Tong Street	20.2%	35.8%	4.6%	37.3%	0.7%	1.4%
Odsal	-	-	-	-	-	-
Mayo Avenue	70.5%	25.9%	3.6%	0.0%	0.0%	0.0%
Bradford District Centre Average*	38.4%	32.8%	6.0%	13.5%	3.5%	5.8%
UK Average**	14.3%	36.8%	7.2%	22.6%	8.3%	10.1%

Source: Site Visit – August/September 2012, * Excluding Odsal and Mayo Avenue, **UK Average Figure, Goad, June 2012

6.12 Set out below are the recommendations for each of the district centres, based on the vitality and viability assessments from the site visits.

Five Lane Ends

6.13 Five Lane Ends is one the largest district centres in Bradford and is located approximately 4km to the east of Shipley town centre. The site visit in August 2012 identified that there was a total of 43 units, comprising a gross floorspace of 21,703 sq.m. The centre is anchored by the Morrisons foodstore, with additional facilities in Five Lane Ends including the Post Office and Rowlands Pharmacy. Since 2007, there has been a significant increase in the proportion of vacant floorspace in the centre as a result of the closure of the DFS, JJB and Big Discount stores. Despite this decline, WYG believe that Five Lane Ends remains an important district centre and continues to play a key role as a retail and service destination for the wider area. WYG therefore proposes that Five Lane Ends remains allocated as a district centre.

Girlington

6.14 Girlington is the largest district centre in the district, and is located 2km to the west of Bradford city centre. The 80 units comprise a total gross floorspace of 25,220 sq.m. The Victoria Shopping centre accommodates a number of national retailers, including Morrisons (8,603 sq.m), The Range (6,466 sq.m) and Specsavers (129 sq.m). There is also a good provision of local independent traders, including several clothing, furniture and household goods stores. Although the proportion of vacant units is slightly above the national average, these vacant units are small and only comprise 3.5% of



the total floorspace in the district centre, with an average vacant unit size of 88 sq.m. The site visit in September 2012 confirmed that the centre was performing well, with the high levels of pedestrian and vehicular movement indicating that Girdlington was a popular destination for local residents. As a result, WYG believe that Girdlington should continue to be allocated as a district centre.

Great Horton

- 6.15 Great Horton is located in the south of the Study area, approximately 3km to the south west of Bradford city centre. It is an important retail and service destination, with the 59 units in the centre accommodating a total floorspace of 7,304 sq.m. There is a good provision of convenience, retail service, leisure service and financial/business service outlets in the centre, although there is a significant shortfall in the proportion of comparison goods units and floorspace. It was identified in the previous BRLS (2008) that Great Horton is unique in the Bradford retail hierarchy as it is the only district centre not to contain a retail park. However, a large Tesco Extra is located just outside the centre boundary and since the previous BRLS (2008), the store has been extended (LPA Ref. 09/05692/FUL). The number of vacant units in Great Horton (13.6%) is marginally above the national average (12.1%), whilst the amount of vacant floorspace (9.6%) is slightly below the national figure of 10.1%. To summarise, the site visit indicated that Great Horton was performing well and despite the shortage of national operators and comparison units, WYG believes that it should be retained as a district centre.

Greengates

- 6.16 The site visit in August 2012 indicated that Greengates is a healthy district centre, particularly due to the extremely low vacancy levels and the overall provision of its facilities. It is located in the east of the district Study Area, with Bradford city centre approximately 6.5km to the south west. The centre comprises 38 stores, with a total gross floorspace of 18,265 sq.m. Although there is a shortage of convenience stores compared to the national average, the two foodstores, the Sainsbury's and Asda (former Netto), appeared to be trading well. There is also a good variety of comparison outlets in Greengates, including a Homebase, Matalan and two pharmacies, as well as a Post Office, opticians and petrol filling station. The reduction in the number of vacant units and the amount of vacant floorspace since the BRLS (2008) can be attributed to the take-up of businesses within the New Line Retail Park which had only recently opened for trading at the time of the previous site visit in 2007. A total of 36% of the stores are operated by national retailers, including Boots, Coral and Subway, which is also a positive indicator of the vitality and viability of Greengates. WYG proposes that Greengates should remain as a district centre.



Thornbury

- 6.17 Thornbury is the smallest district centre, with the 16 units comprising a total floorspace of 17,968 sq.m. It is located approximately 3.5km to the east of Bradford city centre. The Woodhall Retail Park dominates the district centre and only contains national operators, including an Asda (former Netto), Iceland and Morrisons foodstores, B&Q and Carpet Right. The additional facilities in the centre include several small independent units on Leeds Old Road, as well as a McDonalds fast food outlet. Overall, the centre appeared to be performing well, with the development of the new commercial units and Bradford Plaza development indicating that there is a strong level of commercial confidence in the centre. The site visit in September 2012 identified that there were two vacant units in Thornbury, though WYG have since received confirmation from the agents of the former retail warehouse (1,454 sq.m) that it has been purchased by a national operator. WYG believes that Thornbury should remain as a principal district centre, though its boundary should be amended to include the two new terraces of shops at the junction of Leeds Old Road and Rushton Avenue.

Tong Street

- 6.18 Tong Street is located in the south east of the district and comprises 36 units which have a total gross floorspace of 10,226 sq.m. The centre is effectively split into two separate and distinct areas on both sides of Tong Street, with a mix of unit sizes and operators. The Avenue Retail Park accommodates the largest units, including Gala Bingo, Iceland and Superdrug, whilst the remaining smaller units on Tong Street tend to be operated by independent local retailers, with the exception of the Bargain Booze, Post Office and William Hill stores. There is also a good variety of facilities in the district centre, including a bakers, newsagent and nine take aways. There has been a significant improvement in both the number and amount of vacant floorspace since the previous BRLS (2008), with the two vacant units only accounting for 5.6% of the outlets and 1.4% of the floorspace in the centre. The two largest former vacant units within the Retail Park are now in operation as a Cash Converters and Pet city, which indicates that the level of commercial confidence in the centre has improved since the previous BRLS (2008). As a result, WYG proposes that Tong Street should remain as a district centre.

Mayo Avenue (Former District Centre)

- 6.19 Mayo Avenue is located approximately 3km to the south of Bradford city centre and between Marshfields and Bankfoot local centres. The previous BRLS (2008) recommended the de-listing of Mayo Avenue as a district centre from the retail hierarchy. This has been reflected in the Bradford Core Strategy Further Engagement Draft report (October 2011) where it was noted that Mayo Avenue district centre did 'not have the necessary range of uses to be considered a district centre or even a local centre.' The report also noted that it lacked the opportunities for any expansion in additional retail and service floorspace, and was therefore viewed as a free standing out of town centre



designation. Since the BRLS (2008), there has been no change in the provision of facilities in Mayo Avenue, and there remains a Morrisons foodstore, petrol filling station and Matalan store. WYG believe that Mayo Avenue should therefore continue to be regarded as an out of centre destination and does not need to be re-classified as either a district or local centre.

Local Centres

- 6.20 In addition to the district centres, WYG also reviewed the 47 local centres, as identified in the Bradford Core Strategy Further Engagement Draft report (October 2011). A full analysis and health check for each of the centres is included in Appendix 3, though WYG have summarised the key findings below. WYG also provide an assessment on the centres which should have their boundaries amended, as well as overall recommendations as to whether some of the centres should be re-designated.
- 6.21 The local centres vary in size, accommodating between five (Sandy Lane) and 77 (Silsden) units, and 344 sq.m (Sandy Lane) and 10,167 sq.m (Idle) of floorspace. The average local centre in Bradford accommodates 33 units and comprises 3,459 sq.m. The overall provision and quality of the retail and service facilities in each of the centres also varies significantly, with five of the centres (Cross Road – Keighley, White Abbey Road, Sandy Lane, Clayton and Leeds Road) not accommodating the four key facilities, namely an ATM, convenience store, pharmacy and Post Office. In comparison, 12 of the centres contain all of these facilities: Silsden, Burley-in-Wharfedale, Baildon, Oakworth, Saltaire, Idle, Frizinghall, Allerton, Queensbury, Wilsden, Denholme and Wyke. The vacancy rates in the local centres of Bradford (9.4%) are below the national local centres average figure (10.7%), with 11 of the 47 centres accommodating no vacant units. In addition, the site visit in August 2012 identified that Baildon comprises a total of 65 units, with only one store currently vacant (1.5%). The local centres of Laisterdyke (21.4%), Frizinghall (25.7%) and Holme Wood (27.2%) have the highest proportion of vacant units.
- 6.22 Overall, WYG believe that the majority of the local centres are healthy, performing well and continue to perform an important role in serving local residents and the wider community. However, the site visits in August and September 2012 identified that the boundaries of several of the centres should be amended in order to reflect changes which have occurred since the previous BRLS (2008). These comprise:
- Crossflatts – WYG propose that the centre boundary is amended to remove 1-4 Canal Road as these are residential properties;
 - Frizinghall – The boundary should be altered to remove 23-27 Aireville Road as these are residential properties;



- Clayton – WYG believe that the boundary of the centre should be widened to include several commercial units on Clayton Lane and Station Road, as well as the Co-op foodstore on Bradford Road;
- Queensbury – It is recommended that the Queensbury centre boundary is altered to include 16-18 Sand Beds, as well as to remove several residential properties;
- Lidget Green – WYG propose that the Lidget Green boundary is extended to include the 18 commercial units at the junction of Wheater Road;
- Marshfields – The boundary should be amended to remove several residential units on Manchester Road and include the Boots pharmacy and opticians units to the east of the centre;
- Wibsey – WYG recommend that the centre boundary is widened to the east to include several additional commercial units at the junction of Sanderson Avenue, including a Costcutter convenience store (and ATM), take away and hotel; and
- Leeds Road – The centre boundary should be altered to include several commercial units to the west, including a Shell petrol filling station (and ATM), take away, travel agents and café.

6.23 In addition, WYG believe that Sandy Lane should be de-allocated as a local centre due to the lack of facilities and services it provides, particularly as the site visit identified that it only accommodates an electrical goods operator, two hairdressers, a take away and a hotel/pub. In contrast, WYG propose that Bolton Junction should be re-defined as a local centre as it accommodates a number of key facilities, including a Co-operative Food and HSBC bank. The previous BRLS (2008) also identified the designation of 11 new local centres, namely Steeton with Eastburn, Menston, Riddlesden, Oakworth, Heaton, Sandy Lane, Harden, Cullingworth, Wilsden, Cottingley and Low Moor. The exact boundaries of these new local centres (with the exception of Sandy Lane) will be agreed after discussions with Bradford Council, particularly as the stores in these centres tend to be more dispersed than the other centres.

6.24 Whilst the majority of local centres are healthy and performing their expected role and function, we have identified a number of centres which are in need of intervention, through increase diversity of use and improved facilities, the following centres are:

- Fell Lane/Oakworth (Keighley) Local Centre – The centre would benefit from an increased diversity of uses. The centre does not contain a convenience store, pharmacy or ATM.
- Cross Road (Keighley) Local Centre – The centre would benefit from an increased diversity of uses. The centre does not contain a convenience store, pharmacy, Post Office or ATM.



- Frizinghall Local Centre – The centre is suffering from a high vacancy rate. Vacancies have increased significantly since 2007.
- Princeville Local Centre - The centre is suffering from a high vacancy rate. The centre would benefit from an increased diversity of uses. The centre does not contain a pharmacy or Post Office.
- Bankfoot (Manchester Road) Local Centre - The centre is suffering from a high vacancy rate. Vacancies rates have remained high since 2007.
- Holme Wood Local Centre - The centre is suffering from a high vacancy rate. Vacancies rates have remained high since 2007. The centre would benefit from an increased diversity of uses. The centre does not contain a convenience store and the Post Office has closed down.
- Laisterdyke Local Centre - The centre is suffering from a high vacancy rate. Vacancies rates have increased since 2007.
- Sticker Lane Local Centre - The centre would benefit from an increased diversity of uses. The centre does not contain a convenience store or pharmacy.

Conclusions

- 6.25 The assessment by WYG to determine the health of each of the district and local centres in Bradford has indicated that the majority of these remain vital and viable centres. They also perform a key role serving the local population, whilst also continuing to complement the established principal centres of Bradford, Bingley, Ilkley, Keighley and Shipley. As a result, with the exception of Odsal, Sandy Lane and Bolton Junction, WYG propose that no changes shall be made to the designation of the centres, although minor amendments should be made to the boundaries of several of the centres.



7.0 CHANGES TO SHOPPING PATTERNS

Introduction

7.01 A key element of this Study was to obtain a detailed understanding and review of the catchment of existing settlements and/or towns within Bradford. This section is concerned with the market share of existing facilities based on shopping trips rather than the amount of expenditure generated. The analysis of shopping patterns within each of the zones allows for detailed assessments to be undertaken for the various goods identified (e.g. main food, clothing, electrical goods, DIY, recreation, etc.). This can often assist with the identification of any qualitative deficiencies in provision. This analysis of shopping patterns (rather than expenditure flows) allows for equal weight to be given to each category. The results of the 2008 survey are compared to the results of the most recent survey (2012) in order to ascertain whether there have been any significant changes in shopping patterns over the last five years and to consider the reasons for any such changes.

Main Food Shopping Patterns

7.02 **Table 7.1** below indicates that convenience stores within the district claim a market share of 78.5% of all main food shopping trips which originate from inside the district. The district's market share has improved since the BRLS was undertaken in 2008, at which time the market share was 73.2%²⁴ (an increase of 5.3 percentage points).

²⁴ Market share adjusted from 72.1% (2008) to exclude SFT allowances.



Table 7.1: Main Food Shopping Market Share Analysis by Zone (%)

Zone	Market Share (%)		
	2008	2012	Difference
1	85.7	88.5	2.8
2	83.1	72.7	-10.4
3	77.2	75.0	-2.2
4	47.7	51.6	3.9
5	91.9	96.9	5.0
6	92.7	91.8	-0.8
7	93.9	93.8	-0.1
8	75.6	82.3	6.7
9	16.9	27.6	10.7
10	43.7	68.4	24.7
11	59.6	51.1	-8.6
12	93.2	93.9	0.6
13	98.9	99.0	0.1
14	94.8	99.0	4.2
15	90.2	94.8	4.7
16	88.8	95.9	7.2
17	33.0	52.1	19.1
18	59.0	71.6	12.5
Total	73.2	78.5	5.3

Source: Table 3, Appendix 7 (BRLS Update 2012) and Table 3, Appendix 9 (BRLS (2008), adjusted to exclude SFT)

7.03 Zones 5, 6, 7, 12, 13, 14, 15 and 16 have a main food shopping market share of more than 90%, with facilities within the district claiming more than 90% of expenditure on main food shopping originating from these zones. These zones with the highest main food market share are located at the core of the district and around Bradford city centre. The retention of convenience goods expenditure on main food shopping is lowest in Zone 9, where the market share is only 27.6%. However this is to be expected as this zone is located outside the district in close proximity to Halifax.

7.04 Since 2008, there has been a substantial decrease in the main food shopping market shares of Zone 2 and Zone 11. Zone 2's main food shopping market share has decreased by 10.4 percentage points from 83.1% to 72.7%. Zone 2 is located at the periphery of the Study Area, with the majority of the Zone located outside Bradford district. The Zone is located in close proximity to Skipton and Colne, and it is likely to be the case that there has been an increase in the proportion of the population from Zone 2 choosing to undertake their main food shopping trips in these locations outside the district rather than within the district. The decrease to Zone 2's main food market share is likely to have been



influenced by the opening of a new Tesco supermarket on Craven Street, Skipton in 2009 and the opening of a new Sainsbury's supermarket on Windsor Street, Colne in 2010.

- 7.05 Zone 11's main food shopping market share has also decreased by 8.6 percentage points since 2008, from 59.6% to 51.1%. Zone 11 is located at the south east periphery of the Study Area, with half of the Zone located outside Bradford district. The Zone is located in close proximity to the M62 and M602 and therefore residents from the Zone are able to travel to areas outside the district for their main food shopping. Within Zone 11, there is no large supermarket, with the main convenience offer provided by the Iceland (516 sq.m net) in Tong. Therefore, the decrease to the Zone's main food shopping market share is likely to have been influenced by improvements to convenience shopping provision outside the district attracting an increased proportion of shoppers.
- 7.06 There most substantial improvements to the main food shopping market shares have been in Zone 10 and 17, where the market shares have increased by 24.7 percentage points and 19.1 percentage points respectively. These increases are likely to have been driven by improvements to the convenience provision within the district, particularly in proximity to these zones.
- 7.07 Overall, the main food shopping market share of Bradford district is good, with a high proportion of main food shopping trips undertaken by the district's population being retained within the district.

Table 7.2: Main Food Shopping Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	2.8	3.4	0.6
Keighley town centre	13.2	11.1	-2.1
Ilkley town centre	3.1	2.4	-0.7
Shipley town centre	6.1	7.8	1.8
Bingley town centre	0.6	0.5	-0.1
District centres	35.9	33.6	-2.3
Local centres	3.7	5.9	2.2
Out-of-centre	7.7	13.8	6.0
Total	73.2	78.5	5.3

Source: Table 3, Appendix 7 (BRLS Update 2012) and Table 3, Appendix 9 (BRLS (2008), adjusted to exclude SFT)



- 7.08 **Table 3.2** shows that Keighley attracts the highest convenience goods main food shopping market share of the five main centres at 11.1%. This is a slight decrease (2.1 percentage points) from the 13.2% market share which was achieved by Keighley town centre in 2008. Keighley's high market share can be attributed to the presence of the Sainsbury's on Cavendish Street and Morrisons on Church Way which are both located within the town centre. Shipley attracts the second highest market share out of the five towns at 7.8%, which is an increase of 1.8 percentage points since the BRLS was undertaken in 2008. This can be attributed to the Asda store (3,775 sq.m net) on Manor Lane which attracts shoppers to the town centre. Bradford city centre, Ilkley and Bingley have the lower market shares, of 3.4%, 2.4% and 0.5% respectively. The reason for these lower market shares in these centres is due to the more limited convenience goods offer present in these centres. Although there is a Morrisons present in Bradford city centre at Westgate, the store is relatively small (1,342 sq.m net) when compared to other supermarkets in the district. Similarly in Ilkley, the Tesco (1,662 sq.m net) and the Booths (1,740 sq.m net) provide a more limited amount of convenience floorspace compared to other supermarkets in the district. In Ilkley this issue is reflected in Tesco's decision to relocate their existing store from Springs Lane (in centre) to Railway Road (out-of-centre). In Bingley the main convenience goods offer is provided by the Co-operative Food store, with no large supermarket present in the centre, thus accounting for the lower main food market share achieved by the town. However, the market shares of Bradford, Ilkley and Bingley have remained relatively stable since 2008.
- 7.09 It is the district centres within the Bradford district which retain the highest main food shopping market share at 33.6%. There has been a slight decrease since the BRLS was undertaken in 2008, when the market share was recorded at 35.9%.
- 7.10 Local centres within Bradford district achieve a lower market share than the district centres, at 5.9%. However, this represents an increase since 2008, when the market share achieved by the local centres was just 3.7%.
- 7.11 Out-of-centre facilities within Bradford district achieve a main food shopping market share of 13.8%. Such facilities therefore achieve a lower market share than the district centres, but achieve a greater market share than each town centre and the local centres. The market share achieved by out-of-centre facilities has increased since 2008 by six percentage points (from 7.7%), which is the largest increase of all the destinations.



- 7.12 The above analysis shows that there have been changes to main food shopping patterns in the district since the BRLS was undertaken in 2008. These changes in shopping patterns have been influenced by the development of new convenience foodstores in the district. In Keighley, the slight decrease to the town's market share can be attributed to the opening of the new Asda store on Bradford Road. As this store is located on the edge of the town centre rather than in the centre, shoppers from the district visiting this store have not been included as part of Keighley's market share, but instead as part of the out-of-centre market share. Therefore, the new Asda has contributed to the out-of-centre main food market share increasing by 6.0% since 2008. However, notwithstanding this, Keighley's overall market share has increased from 13.2% to 15.5%. Therefore, showing that more sustainable shopping patterns now occur. The Asda store in Keighley attracts a market share of 4.4% from the Study Area. It can be seen that a high proportion of shoppers attracted to the store are derived from Zone 1, 2 and 5, where the market share attracted by Asda from each of these zones is 20.8%, 22.2% and 26.8% respectively. This is to be expected as the Asda store is located within Zone 5, in close proximity to Zones 1 and 2. The majority of Zone 2 is located outside Bradford district and therefore the substantial market share attracted by the Asda in Keighley from this zone shows that the Asda is attracting main food shoppers into the district. Notwithstanding this, since 2008, the proportion of shoppers from Zone 2 undertaking their main food shopping within the district has decreased by 10.4 percentage points.
- 7.13 The situation is similar in Ilkley where a new Morrison's Local store is now trading on Bolton Bridge Road, outside Ilkley town centre. However, as a 'Local' store the Morrisons only attracts 1% of main food shopping trips from Zone 3 and therefore this new store has not helped reverse the slight reduction in Ilkley town centre's main food shopping market share since 2008.
- 7.14 In Bradford city centre, a new Tesco Express on Sunbridge Road has commenced trading since 2008. This store is likely to have attributed to the slight increase in Bradford's main food shopping market share. However, as an Express store catering mainly for more 'top-up' shopping purposes, the opening of the store has not resulted in a significant change to Bradford's market share.
- 7.15 In Bingley, the Myrtle Walk Shopping Centre has been redeveloped since 2008 to form the 5Rise Shopping Centre. However, the main food shopping provision is provided by the Co-operative Food store and although this store was physically improved by the redevelopment, this only resulted in a small uplift in convenience floorspace (300 sq.m net). This explains the reason the main food shopping market share of Bingley has remained low since 2008. It is expected that once the new



Sainsbury's store (LPA Ref: 11/00940/MAF) on Main Street is developed, Bingley's market share will increase.

- 7.16 The improvement to the main food shopping market share of local centres in the district is likely to have been influenced by the development of the new Tesco store on the edge of Queensbury local centre. The new Tesco, Queensbury store achieves a main food shopping market share of 1.3%. When looking at the zones from which this market share is mainly derived, it can be seen that a reasonable proportion of shoppers from Zone 8, 9 and 10 undertake their main food shopping at the store, which would be expected as the store is located in Zone 8 and is in close proximity to Zones 9 and 10. Within each of these zones, the store attracts a market share of 14.6%, 6.1% and 3.1% respectively. Nearly all of Zone 9 and the majority of Zone 10 are located outside the district, and it is therefore evident that the Tesco, Queensbury has assisted in improving the district's main food shopping market share. Indeed, the main food shopping market share of these three zones has increased by 6.7 percentage points, 10.7 percentage points and 24.7 percentage points respectively.
- 7.17 Since 2008, no new foodstores have opened in district centres, which are likely to have influenced the reduction in their main food market share, when compared to other locations where the main food shopping provision has improved.

Top-Up Food Shopping Patterns

- 7.18 **Table 7.3** below provides a breakdown of the 'top-up' shopping market share achieved by facilities within the Study Area by Zone. Facilities within the district achieve a high 'top-up' shopping market share of 79.9%. This is slightly higher than the main food shopping market share in the district, which would be expected. When comparing the market share at 2012 (79.9%) to the market share in 2008 (76.8%), it can be seen that the market share for top-up shopping in the district has increased by 3.2 percentage points since the BRLS (2008) was undertaken. The top-up shopping market share retained in the Study Area is greater than 90% for half of the Zones (1, 3, 5, 6, 7, 12, 13, 14, 15 and 16). The zone within the lowest top-up shopping market share is Zone 9 (23.2%); this is due to the majority of this zone being located outside the Bradford district boundary.



Table 7.3: Top-up Shopping Market Share Analysis by Zone (%)

Zone	Market Share (%)		
	2008	2012	Difference
1	85.7	96.0	10.3
2	92.1	88.7	-3.4
3	96.4	90.9	-5.4
4	59.2	54.9	-4.2
5	95.8	98.6	2.8
6	96.6	95.8	-0.8
7	98.4	97.3	-1.0
8	85.7	87.7	2.0
9	15.4	23.2	7.8
10	47.6	66.7	19.1
11	55.4	42.9	-12.5
12	91.3	92.8	1.4
13	96.7	98.6	1.9
14	97.6	98.5	1.0
15	91.5	94.5	3.0
16	89.1	98.6	9.5
17	56.1	74.3	18.2
18	54.2	62.9	8.6
Total	76.8	79.9	3.2

Source: Table 3, Appendix 7 (BRLS Update 2012) and Table 3, Appendix 9 (BRLS (2008), adjusted to exclude SFT)

7.19 **Table 7.4** shows the top-up shopping market shares achieved by the five main centres in the district, namely Bradford, Keighley, Ilkley, Shipley and Bingley. Keighley and Shipley attract the highest proportion of top-up shopping trips, with Keighley obtaining a market share of 5.4% and Shipley 5.3%. Keighley's higher market share when compared to the other main centre can be attributed to the presence of Sainsbury's and Morrisons which are located in the town centre. Although Keighley has the highest market share of the five centres, the market share has decreased by 2.4 percentage points (from 7.8%) since the BRLS (2008) was undertaken. However, the market share for Keighley does not include those undertaking top-up shopping at the Asda which is located on the edge of the centre. If the Asda store is taken into account, the market share of Keighley would be 7.6% which is only 0.2 percentage points less than the market share of Keighley at 2008. Shipley's market share has remained static since the BRLS was undertaken in 2008.

7.20 Bradford city centre has a top-up market share of 3.9%. This has increased slightly since the BRLS (2008) was undertaken (from 2.9%). Ilkley's top-up market share is 2.3% and Bingley's is 2.0%; the



market shares of these centres have remained relatively stable since 2008, having decreased by 0.5 and 0.1 percentage points respectively.

7.21 It is the local centres in Bradford district which retain the highest market share for top-up shopping at 25.2%. The market share has increased since the BRLS (2008), when the market share of local centres was 21.4%. It is not surprising that local centres have the greatest market share given their role in catering for everyday shopping needs. District centres in Bradford attract a ‘top-up’ market share of 16.0%; this is a slight decrease from the 18.3% market share that the district centres attracted in 2008. Other out-of-centre retail facilities attract 19.9% of top-up shopping trips by residents in Bradford district, which is an increase from 16.0% in 2008.

Table 7.4: Top-up Shopping Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	2.9	3.9	1.0
Keighley town centre	7.8	5.4	-2.4
Ilkley town centre	2.9	2.3	-0.5
Shipley town centre	5.3	5.3	0.0
Bingley town centre	2.2	2.0	-0.1
District centres	18.3	16.0	-2.3
Local centres	21.4	25.2	3.8
Out-of-centre	16.0	19.9	3.9
Total	76.8	79.9	3.2

Source: Table 3, Appendix 7 (BRLS Update 2012) and Table 3, Appendix 9 (BRLS (2008), adjusted to exclude SFT)

7.22 When studying the top-up shopping market shares by centre, it can be seen that although the market shares for each location are different to those for main food shopping (for example, local centres attract a substantially greater market share for top-up shopping than main food shopping). The changes to the market shares between 2008 and 2012 have followed similar patterns, with the market shares of Bradford city centre, local centres and out-of-centre locations for both main food and top-up shopping increasing and the market shares of Keighley, Ilkley, Bingley and district centres for both main food and top-up shopping decreasing. As discussed in relation to main food shopping patterns, Bradford city centre’s top-up shopping market share has increased. This is likely to have been



influenced by the new Tesco Express store now trading in the centre on Sunbridge Road. The opening of the new Tesco store (1,620sq.m net) on the edge of Queensbury local centre has contributed to the top-up market share of local centres improving, while the two new out-of-centre Tesco Express stores on Huddersfield Road and Manningham Lane have contributed to the increase to the out-of-centre market share.

Main Food and Top-up Shopping Market Shares Outside the Study Area

7.23 As explained above, Bradford district retains a high market share for both main food and top-up shopping - 78.5% for main food shopping and 80.1% for top-up shopping. The proportion of shoppers from within the district travelling to locations outside the Study Area to obtain their food shopping (often referred to as leakage) is low; 9.2% for main food shopping and 6.7% for top-up shopping. The most popular areas for main food shopping outside the Study Area are Calderdale, which attracts a market share of 2.5% and Leeds which attracts a market share of 2.3%. In terms of individual operators, the supermarkets attracting the highest proportion of main food shopping trips are the Morrisons store at Broughton Road in Skipton, which attracts a market share of 1.2% and the Sainsbury's at Wade Street, Halifax which retains a market share of 1.0%. When comparing the market shares of these individual stores to the market shares which they achieve in 2008, the market share of Morrisons, Skipton has increased by just 0.2 percentage points since 2008, whilst the market share of Sainsbury's, Halifax has decreased by 1.0 percentage points. In terms of top-up shopping, the area outside the Study Area which attracts the highest market share is Calderdale, which has a market share of 2.6%, with local shops within Halifax attracting 0.9% market share. There are no individual stores outside of the Study Area which attract a market share for top up shopping greater than 0.5%. It is therefore evident that there are no individual stores outside the Study Area which are attracting a substantial amount of shoppers from within the Study Area, reinforcing the high retention of convenience goods expenditure in Bradford district.

Non-Food Shopping Patterns

7.24 The Household Survey also assessed shopping patterns for a variety of non-food or comparison goods. Such goods include non-bulky goods (clothing and footwear, small household goods, recreational and toy goods and chemist goods) and bulky goods (electrical goods, furniture goods and DIY goods).



- 7.25 Facilities within Bradford district retain a comparison goods market share of 59.5%. This is a moderate decrease (4.2 percentage points) from 2008, when the market share was 63.7%²⁵. Bradford city centre attracts the highest comparison goods market share of the five main centres within the district at 28.5%. This is to be expected given that the city centre is the principal centre within the district and contains the main concentration of comparison goods units. The comparison goods market share attracted by the city centre has remained stable since 2008 (decreasing by just 0.8 percentage points). Keighley town centre attracts the second highest market share of the district's town centres at 11.0%. Again, this is to be expected as Keighley is the second largest town in the district. Keighley's market share has however decreased by 4.9 percentage points (from 15.9%) since 2008. The comparison goods market shares attracted by Ilkley, Shipley and Bingley are much smaller at 2.5%, 2.8% and 0.6% respectively. These centres are smaller in scale than Bradford city centre and Keighley town centre, and their lower market shares can be attributed to the more limited range of comparison goods units present in these centres. In each of these centres, their comparison good market share has not changed substantially since 2008.
- 7.26 Both district centres and out-of-centre shopping facilities within Bradford district attract a comparison goods market share of 4.9%. This is comparable to the market shares achieved by these locations in 2008. Local centres achieve a lower market share of 3.8%; however, this is an increase of 1.8 percentage points since 2008.

²⁵ Market share adjusted from 59.6% (2008) excluding SFT allowances.



Table 7.5: Comparison Goods Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	29.3	28.5	-0.8
Keighley town centre	15.9	11.0	-4.9
Ilkley town centre	2.5	2.3	-0.2
Shipley town centre	2.8	3.4	0.6
Bingley town centre	0.6	0.7	0.1
District centres	5.0	4.9	-0.1
Local centres	2.1	3.8	1.8
Out-of-centre	5.5	4.9	-0.6
Total	63.7	59.5	-4.2

Source: Table 22a, Appendix 7 (BRLS Update 2012) and Table 23a, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

7.27 The changes to the market shares achieved by each location between 2008 and 2012 show that there have been alterations to shopping patterns within the district. The decrease in Bradford city centre’s market share can be attributed to a reduction in the comparison floorspace in the centre during this period. As can be seen from the vitality and viability assessment for Bradford city centre, the amount of comparison goods floorspace in Bradford decreased by 6,580 sq.m²⁶ gross between 2007 and 2012, and this has therefore impacted on the city centre’s comparison goods market share.

7.28 A similar situation has occurred in Keighley, between 2006 and 2012 the comparison goods floorspace in the town centre decreased by 2,100sq.m. The reduced comparison goods offer available in the centre has resulted in a reduction to the town’s market share. The results of the household survey show that although the market share of Keighley town centre has decreased, the comparison goods market share of both Keighley Retail Park and Alston Retail Park have increased since 2008, by 0.8 percentage points and 0.5 percentage points. Keighley Retail Park’s comparison goods market share has increased from 0.6% in 2008 to 1.4% in 2012, while Alston Retail Park’s market share has increased from 0.3% in 2008 to 0.8% in 2012.

²⁶ Source: Appendix 5 Vitality and Viability Assessments, BRLS Update 2008



7.29 This is also the case in Ilkley, where a reduction in the amount of comparison goods floorspace in the town has coincided with a reduction in the town centre's comparison goods market share. During this period from 2008 to 2012, the comparison goods market shares of Shipley and Bingley have increased, this can be attributed to the amount of floorspace in these centres having increased slightly since the BRLS (2008) was undertaken. In Bingley, the Myrtle Walk Shopping Centre has been redeveloped to form the 5Rise Shopping Centre, thus improving the comparison goods retailer offer in the town. This is likely to have contributed to the comparison goods market share of this centre having increased slightly. It is anticipated that once the 5Rise Shopping Centre is fully established and all vacant units are occupied that the market share of this centre may increase further.

Clothing and Footwear

7.30 In terms of shopping for clothing and footwear, facilities in the district attract 48.5% of shopping trips. The market share has decreased by 5.9 percentage points since 2008 when 54.4% was retained. Out of the five main centres in the district, Bradford achieves the highest market share for clothing and footwear at 30.2%. This is to be expected due to the concentration of clothing and footwear stores present in the city centre. However, the city centre's clothing and footwear market share has decreased by 6.7 percentage points since 2008. The town centres in the district achieve lower market shares, with Keighley attracting 8.4%, Ilkley 2.3%, Shipley 1.7% and Bingley only 0.3%, which is reflective of the more limited clothing and footwear provision present in these smaller centres. The market shares of these four centres have remained relatively stable since 2008.

7.31 The district and local centres within Bradford, as well as out-of-centre shopping facilities, only attract a low proportion of shopping trips undertaken for clothing and footwear at 3.5%, 0.4% and 1.8% respectively, although there has been a marked increase (67%) in the retention of clothing and footwear trips at district centres.



Table 7.6: Clothing and Footwear Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	36.9	30.2	-6.7
Keighley town centre	8.2	8.4	0.2
Ilkley town centre	2.1	2.3	0.2
Shipley town centre	1.8	1.7	-0.1
Bingley town centre	0.8	0.3	-0.5
District centres	2.1	3.5	1.4
Local centres	0.7	0.4	-0.3
Out-of-centre	1.6	1.8	0.2
Total	54.5	48.5	-5.9

Source: Table 8, Appendix 7 (BRLS Update 2012) and Table 7, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Small Household Goods

- 7.32 Facilities in the district attract 59.4% of shopping trips for small household goods undertaken by the district's population. The market share retained in the district has remained relatively stable since 2008, when the market share was 58.1%. Bradford city centre attracts a market share of 30.2% for small household goods, a slight increase from the 30.0% market share retained in 2008. Again, the city centre attracts a greater market share than the town centres within the district due to the wide range of retail units trading in small household goods. The market shares for small household goods achieved by the four town centres are: Keighley (9.1%), Ilkley (2.2%), Shipley (3.7%) and Bingley (0.7%). The market shares of these town centres have remained relatively stable since 2008, with only a slight increase of 0.4 percentage points and 0.5 percentage points respectively in Shipley and Bingley and a slight decrease in Keighley and Ilkley of 1.3 percentage points and 0.2 percentage points respectively.
- 7.33 Local centres within the district attract a higher market share for small household goods (6.4%) than the district's district centres (5.3%). This is due to an increase in the market share retained by local centres of 3.8 percentage points since 2008, coinciding with a decrease in the market share retained by the district centres of 2%. Out-of-centre facilities in the district attract a small household goods market share of 1.9%. The market share has decreased slightly by 0.8 percentage points since 2008.

Table 7.7: Household Goods Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	30.0	30.2	0.2
Keighley town centre	10.4	9.1	-1.3
Ilkley town centre	2.4	2.2	-0.2
Shipley town centre	3.3	3.7	0.4
Bingley town centre	0.2	0.7	0.5
District centres	7.3	5.3	-2.0
Local centres	2.0	6.4	4.4
Out-of-centre	2.7	1.9	0.8
Total	58.1	59.4	1.3

Source: Table 16, Appendix 7 (BRLS Update 2012) and Table 17, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Recreational Goods, Toys etc.

- 7.34 In terms of shopping for recreational goods, toys etc, facilities in the district attract 66.6% of shopping trips originating from within the district. The market share has increased by 7.4 percentage points since 2008, when the market share was 59.2%.
- 7.35 Out of the five main centres in the district, Bradford city centre is the principal centre in the district and attracts the highest market share of recreational goods, toys etc at 35.1%. This compares to a market share of 36.7% which was achieved by the city centre in 2008. Keighley town centre has the second highest market share for recreational goods, toys etc at 14.2%, which is a 1.7 percentage point increase since 2008. As Ilkley, Shipley and Bingley provide a more limited comparison goods offer the proportion of shoppers from within the district attracted to these town centres for recreational goods, toys etc is smaller, with these centres achieving market shares of 1.1%, 4.8% and 0.3% respectively.
- 7.36 Local centres within the district attract a higher recreational goods market share (4.4%) than the district centres (3.0%). The local centre's market share has increased by 3.9 percentage points since 2008. Out-of-centre facilities within the district attract a recreational goods market share of 3.6%.



Table 7.8: Recreational Goods, Toys, etc. Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	36.7	35.1	-1.6
Keighley town centre	12.5	14.2	1.7
Ilkley town centre	1.6	1.1	-0.5
Shipley town centre	2.7	4.8	2.1
Bingley town centre	0.0	0.3	0.3
District centres	3.0	3.0	0.0
Local centres	0.5	4.4	3.9
Out-of-centre	2.2	3.6	1.4
Total	59.2	66.6	7.4

Source: Table 18, Appendix 7 (BRLS Update 2012) and Table 19, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Chemist Goods

- 7.37 Facilities in the district attract 75.2% of shopping trips undertaken for chemist goods within the district. This is an increase of 4.5 percentage points since 2008 and is the second highest market share achieved for non-food goods. Bradford city centre attracts a market share of 26.0% for chemist goods, Keighley has the second largest market share of the main centres at 12.2%, Ilkley's market share is 3.1%, Shipley's is 6.4% and Bingley's is 2.7%. The market shares of the main town centres have not changed substantially since 2008. The greatest increase has been in Shipley, where the chemist goods market share has increased by 1.9 percentage points.
- 7.38 Local centres within the district attract a substantial market share for chemist goods at 13.2%, with the local centres attracting a higher market share of chemist goods than any other non-food goods category. The local centre's market share has increased by 5.2 percentage points since the 2008. The market share attracted by the district centres is less than that achieved by the local centres at 9.6%. This is however an increase from the market share achieved at 2008 (8.0%). Out-of-centre facilities within the district attract a low chemist goods market share of 2.0%, which is a decrease of 1.9 percentage points since 2008.



Table 7.9: Chemist Goods Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	27.2	26.0	-1.2
Keighley town centre	12.5	12.2	-0.3
Ilkley town centre	4.4	3.1	-1.3
Shipley town centre	4.5	6.4	1.9
Bingley town centre	2.2	2.7	0.5
District centres	8.0	9.6	1.6
Local centres	8.0	13.2	5.2
Out-of-centre	3.9	2.0	-1.9
Total	70.7	75.2	4.5

Source: Table 20, Appendix 7 (BRLS Update 2012) and Table 21, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Electrical Goods

7.39 In terms of shopping for electrical goods, facilities in the district attract 72.2% of shopping trips undertaken by the district's population. This is a 1.6 percentage point increase to the market share achieved in 2008 (70.6%). Bradford city centre attracts a substantial proportion of the electrical goods market share at 40.6%, which is the highest achieved for non-food items in the city centre. The market share has remained relatively stable since 2008, having decreased by just 0.9 percentage points. Keighley's market share is 11.6%, which is 1.9 percentage points lower than the market share of 13.5% achieved in 2008. The market shares achieved for electrical goods in Ilkley, Shipley and Bingley are low at 1.0%, 0.3% and 3.6%.

7.40 The district and local centres within the district also achieve a low market share in relation to electrical goods. The district centre's market share equals 3.4%, which is a 3.1 percentage point decrease since 2008. The market share achieved by the district's local centres is only 0.9%. However this is an increase of 0.6 percentage points since 2008. Out-of-centre facilities attract a high proportion of shopping trips for electrical goods, achieving a market share of 10.8%. The market share for out-of-centre facilities has increased by 6.9 percentage points since 2008.

Table 7.10: Electrical Goods Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	41.5	40.6	-0.9
Keighley town centre	13.5	11.6	-1.9
Ilkley town centre	1.5	1.0	-0.5
Shipley town centre	2.7	3.6	-0.9
Bingley town centre	0.6	0.3	-0.3
District centres	6.5	3.4	-3.1
Local centres	0.3	0.9	0.6
Out-of-centre	3.9	10.8	6.9
Total	70.6	72.2	1.6

Source: Table 14, Appendix 7 (BRLS Update 2012) and Table 13, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Furniture

- 7.41 Facilities within Bradford district achieve a market share of 66.7% for furniture. The district's market share has increased by 4.7 percentage points (from 62.1%) since 2008. Bradford city centre achieves the highest market share for furniture of the main town centres at 28.9%. The market share has remained relatively stable since 2008, decreasing by 0.9 percentage points. Keighley's market share is 11.6% and Shipley's is 5.2%. The smallest market shares are achieved by Bingley and Ilkley which have market shares of 1.2% and 1.1% respectively.
- 7.42 The local centres in the district achieve a market share for furniture of 7.4%. There has been a substantial (4.5 percentage points) increase to the market share since 2008, when the market share was 2.9%. The market share achieved by the local centres is slightly higher than achieved by the district centres which attract a market share of 7.0%. The district centre's market share has remained relatively stable since 2008, having decreased by just 0.7 percentage points. Out-of-centre facilities within the district achieve a market share of 4.3% for furniture.

Table 7.11: Furniture Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	29.8	28.9	-0.9
Keighley town centre	12.3	11.6	-0.7
Ilkley town centre	1.1	1.1	0.0
Shipley town centre	3.5	5.2	1.7
Bingley town centre	1.3	1.2	-0.1
District centres	7.7	7.0	-0.7
Local centres	2.9	7.4	-4.5
Out-of-centre	3.5	4.3	0.8
Total	62.1	66.7	4.7

Source: Table 10, Appendix 7 (BRLS Update 2012) and Table 9, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

DIY

- 7.43 In terms of shopping for DIY goods, facilities in the district attract 80.4% of shopping trips undertaken by the district's population. This is the highest market share achieved by the district for any of the seven non-food categories. The DIY goods market share has increased by 6.5 percentage points since 2008 (from 73.9%).
- 7.44 The most popular location for people to undertake their shopping for DIY goods is Bradford city centre achieves a market share of 21.8%. Although this market share is quite low when compared to the other non-food good categories, Bradford's market share has increased by 10.2 percentage points since 2008. The second most popular location to purchase DIY goods is from out-of-centre locations, which achieve a market share of 19.8%; the highest market share achieved by out-of-centre facilities in terms of all non-food goods categories. However, the market share of out-of-centre facilities has decreased substantially since 2008, by 14.5 percentage points.
- 7.45 Keighley's DIY goods market share has improved since 2008, increasing from 6.6% to 10.3%. The market shares of Ilkley, Shipley and Bingley have also increased slightly. However, they remain low at 2.0%, 3.3% and 1.1% respectively. Collectively the district centres achieve a market share of 16.6% which is higher than the market share of each of the town centres. The district centre's market share



has remained stable since 2008, increasing by just 0.3 percentage points. The DIY goods market share for local centres has increased by 2.8 percentage points since 2008, from 2.7% to 5.5%.

Table 7.12: DIY Goods Market Shares by Centre

	Market Share (%)		
	2008	2012	Difference
Bradford city centre	11.0	21.8	10.8
Keighley town centre	6.6	10.3	3.7
Ilkley town centre	1.6	2.0	0.4
Shipley town centre	1.4	3.3	1.9
Bingley town centre	0.0	1.1	1.1
District centres	16.3	16.6	0.3
Local centres	2.7	5.5	2.8
Out-of-centre	34.3	19.8	-14.5
Total	73.9	80.4	6.5

Source: Table 12, Appendix 7 (BRLS Update 2012) and Table 11, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)

Comparison Market Shares Outside the Study Area

7.46 As explained above, Bradford district achieves a comparison goods market share of 59.5%. There is a further 9.0% retained within the wider Study Area (in parts of Calderdale, Leeds and Kirklees), with the Study Area as a whole achieving a market share of 68.5%. Bradford district's comparison goods market share has decreased by 4.2 percentage points since 2008, when the district's market share was 63.7%.

7.47 **Table 7.13** below shows that the majority of this reduction in the district's market share is as a result of an increase to the market share attracted by locations in Leeds district, which are located inside the Study Area but outside Bradford. Since 2008, the comparison goods market share of Guiseley has increased by 1.6 percentage points, the market share of Pudsey has increased by 0.6 percentage points, the market share of Otley has increased by 0.2 percentage points and the market share of Farsley has increased by 0.1 percentage points. The facilities in Guiseley and Otley are located in Zone 4, and the facilities in Pudsey and Farsley are located in Zone 18, which are both in the eastern part of the Study Area. The results show that since 2008, an increased number of shoppers are being



attracted by facilities in these locations. These facilities are only located a short distance outside Bradford district, and therefore these shopping patterns are broadly sustainable.

7.48 The results of the household survey also indicate that the comparison goods facilities within Zone 4 which are located within the district attract less than 0.1% of comparison good shopping trips, demonstrating that the facilities in Guiseley and Otley are attracting more shoppers than these facilities within the district. However, this is to be expected as Guiseley and Otley are town centres, whereas just two local centres are located in Zone 4. Facilities in Zone 18, which are located within the district, attract a comparison goods market share of 3.2%, which is slightly less than the market share of 4% attracted by facilities in Pudsey and Farsley.

Table 7.13: Comparison Goods Market Share of Locations Outside the District (within the Study Area)

Location	Market Share (%)		
	2008	2012	Difference
Leeds city			
Guiseley	0.9	2.1	1.2
Focus, Guiseley	0.3	0.0	-0.3
Guiseley Retail Park, Guiseley	0.1	0.0	-0.1
West Side Retail Park, Guiseley	0.4	1.1	0.7
Morrisons, Otley Road, Guiseley	0.1	0.2	0.1
Sub-total Guiseley	1.8	3.4	1.6
Otley	0.5	0.7	0.2
Sub-total Otley	0.5	0.7	0.2
Pudsey town centre	1.8	1.6	-0.2
Owlcotes Centre, New Pudsey	1.2	1.7	0.5
Asda, Owlcotes Centre, Pudsey	0.3	0.5	0.2
Marks and Spencers, The Owlcotes Centre, New Pudsey	0.0	0.1	0.1
Sub-total Pudsey	3.3	3.9	0.6
Farsley	0.0	0.1	0.1
Sub-total Farsley	0.0	0.1	0.1
Sub Total (all)	5.6	8.1	2.5

Source: Table 22a, Appendix 7 (BRLS Update 2012) and Table 23a, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)



7.49 The remaining comparison goods market share is leaking outside of the district and Study Area to other facilities, with these locations outside the Study Area attracting a market share of 31.5%. This is a decrease of 2.3 percentage points since 2008. The area outside the Study Area attracting the highest proportion of comparison goods shoppers from the Study Area is Leeds - with the Leeds area achieving a market share of 12.1%. However, the market share attracted by the Leeds area has decreased by 6.5 percentage points since 2008. It is Leeds city centre which is the greatest attraction within the Leeds area, with the city centre achieving a comparison goods market share of 8.1%. This is however 0.5 percentage points less than the city centre's market share in 2008. The White Rose Shopping centre is also a popular destination, attracting a market share of 3.0%, which is 0.7 percentage points more than was achieved in 2008. In terms of other locations outside the Study Area which are popular with shoppers from within the Study Area; Halifax town centre achieves a comparison goods market share of 5.3%, Birstall Shopping Centre (Junction 27 Retail Park) attracts a market share of 3.7%, Colne town centre attracts a market share of 1.4%, Skipton town centre attracts a comparison goods market share of 1.2% and Huddersfield town centre attracts a market share of 1.0%. Since 2008, the market shares of Birstall Shopping Centre and Colne town centre have increased by 1.0 percentage points and 0.7 percentage points respectively, while the market shares of Skipton town centre and Huddersfield town centre have fallen by 0.5 percentage points and 0.1 percentage points respectively.

Table 7.14: Comparison Goods Market Share of Locations Outside the Study Area

Location	Market Share (%)		
	2008	2012	Difference
Leeds	18.6	12.1	-6.5
Leeds city centre	8.6	8.1	-0.5
White Rose Shopping Centre	2.3	3.0	0.7
Halifax town centre	5.3	5.3	0.0
Birstall Shopping Centre (Junction 27 Retail Park)	2.7	3.7	1.0
Colne town centre	0.7	1.4	0.7
Skipton town centre	1.7	1.2	-0.5
Huddersfield town centre	0.9	1.0	-0.1
Total Outside Study Area	33.8	31.5	-2.3

Source: Table 22a, Appendix 7 (BRLS Update 2012) and Table 23a, Appendix 10 (BRLS (2008)) (adjusted to exclude SFT)



7.50 It is apparent that many of these trips to locations outside the Study Area originated from zones on the periphery of the Study Area. For example, the majority of people undertaking their comparison goods shopping in Colne town centre are from Zones 1 and 2. However, in some cases destinations outside the Study Area are attracting shoppers from all zones, for example, Leeds city centre.

Special Forms of Trading (SFT)

7.51 The household survey identifies that 2.7% of respondents from the Study Area undertaken their main food shopping purchases using the internet. This is a 59% increase from 2008, when 1.7% undertook their main food shopping via the internet. In terms of top-up shopping, 0.3% of respondents order their top-up shopping over the internet; this is a 50% increase from 2008, when 0.2% undertook their top-up shopping via the internet.

7.52 In terms of clothing and footwear, 7.5% purchase goods via the internet, which is an increase of 2.1 percentage points since 2008. For small household goods, 8.8% purchase such good using the internet, this compares to 16.2% for recreational goods, 3.3% for chemist goods. The proportion of respondents purchasing such goods via the internet since 2008 has increased by 2.1 percentage points, 6.1 percentage points and 0.3 percentage points respectively. The products which are most commonly purchased via the internet are electrical goods, which 16.7% of respondents purchased over the internet. This is an increase of 3.8 percentage points since 2008, when the proportion of respondents purchasing electrical goods via the internet was 12.9%. DIY goods are the least common type of comparison good found to be purchased by internet, with just 1.8% of respondents buying such goods over the internet, an increase from 1.4% in 2008 (0.4 percentage points).

7.53 It is evident from the household survey results that buying both food and non-food goods over the internet is becoming increasingly popular, as the proportion of respondents buying each category of product over the internet has increased since 2008.

**Table 7.15: Special Forms of Trading (SFT)**

	SFT (%)		
	2008	2012	Difference
Main Food Shopping	1.7	2.7	1.0
Top-Up Shopping	0.2	0.3	0.1
Clothing and Footwear	5.4	7.5	2.1
Small Household Goods	6.7	8.8	2.1
Recreational Goods, Toys etc	10.1	16.2	6.1
Chemist Goods	3.0	3.3	0.3
Electrical Goods	12.9	16.7	3.8
DIY Goods	1.4	1.8	0.4
Furniture	3.4	6.0	2.6

Source: NEMS Household Survey 2012 (not weighted and adjusted to exclude don't know/can't remember responses)

7.54 This trend towards increased use of the internet to purchase both convenience and comparison goods is reinforced by the responses to question 37 of the household survey, which asks "Do the people who live in your house, including you, make use of electronic home shopping (i.e. internet or TV shopping)?" The results confirm that 58.7% of respondents use the internet to shop, 11.4% use portable internet i.e. mobile phone and 7.1% undertake TV home shopping. This is an increase from 2008, when 32.6% used the internet and 4.5% used TV shopping²⁷. The proportion of respondents not using electronic home shopping has decreased by 20.3 percentage points from 59.7% in 2008 to 39.4% in 2012.

²⁷ At 2008, portable internet wasn't as readily available, so this response wasn't included as an option and therefore no comparison can be made.



Table 7.16: Proportion of Respondents to the Household Survey (2008 and 2012) Using Electronic Home Shopping

	Proportion of respondents		
	2008	2012	Difference
Yes, Internet	32.6	58.7	26.1
Yes, Portable Internet (through mobile phone)	-	11.4	-
Yes, TV Shopping	4.5	7.1	2.6
No	59.7	39.4	20.3

Conclusions

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

- 7.56 In relation to comparison goods, the market share retained by the district is lower at 59.5%. 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%. There is therefore 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.

- 7.57 Since 2008, using the internet to purchase both food and non-food goods has become increasingly popular.



8.0 POPULATION AND EXPENDITURE

Introduction

- 8.01 This section of the report assesses the current population and available expenditure (relating to both convenience and comparison goods) within the defined Study Area.

Study Area Population

- 8.02 The population within each postcode sector has been calculated using Experian Micromarketer G3 data (2011 estimate). The baseline population data takes into consideration the findings of the recent 2011 Census release which has then been projected forward by Experian (using growth rates derived from ONS population projections).
- 8.03 Population figures are provided for each of the eighteen survey zones. For the purpose of this Study, population and expenditure has been calculated at five-year intervals to 2028²⁸ in accordance with the NPPF (i.e. 2012, 2017, 2022 and 2028) and to reflect the emerging Local Plan timeframe.
- 8.04 On this basis, the identified Study Area is estimated to contain a resident population of approximately 687,273 people at 2012, rising to 716,440 people by 2017, to 742,468 people by 2022 and to 769,685 people by 2028. This represents an increase in population within the Study Area of 82,412 people (or 12.0%) between 2012 and 2028, representing a growth rate of 0.75% per annum.
- 8.05 **Table 8.1** provides a detailed breakdown of the forecast population change within each survey zone in the period through to 2028.

²⁸ 2028 represents a six year period after 2022, but corresponds with the 2028 period for the Local Plan. WYG advise that the retail element of the study should be regular updated at five year intervals in accordance with the Practice Guidance on Need, Impact and Sequential Approach.



Table 8.1: Population by Survey Zone

Zone	2011	2012	2017	2022	2028
1.	<i>23,593</i>	23,718	24,491	25,204	25,795
2.	<i>26,069</i>	26,114	26,916	27,686	28,514
3.	<i>30,672</i>	30,663	30,493	30,405	30,392
4.	<i>43,335</i>	43,563	43,935	44,136	44,625
5.	<i>28,648</i>	28,959	30,574	32,053	33,766
6.	<i>32,975</i>	33,179	33,739	34,259	34,741
7.	<i>36,405</i>	36,789	38,698	40,447	42,193
8.	<i>28,884</i>	29,140	30,300	31,276	32,196
9.	<i>32,158</i>	32,381	33,729	35,026	36,275
10.	<i>54,104</i>	54,452	56,201	57,757	59,187
11.	<i>38,241</i>	38,543	40,034	41,368	42,907
12.	<i>27,140</i>	27,615	29,555	31,469	33,629
13.	<i>65,575</i>	66,301	70,571	74,359	78,194
14.	<i>49,650</i>	50,651	54,804	58,740	62,721
15.	<i>44,854</i>	45,239	48,034	50,325	52,756
16.	<i>28,256</i>	28,495	29,934	31,246	32,535
17.	<i>32,787</i>	32,909	33,537	33,970	34,515
18.	<i>58,272</i>	58,562	60,895	62,742	64,744
Total	<i>681,618</i>	687,273	716,440	742,468	769,685

Source: Experian Micromarketer G3 data (Table 1, Appendix 7)

8.06 The above Experian data excludes anticipated housing growth figures above trend based projections. WYG note that this update provides a baseline position, which will need to be updated to reflect the preferred spatial development options for housing growth across the district.

Retail Expenditure

8.07 In order to calculate convenience and comparison expenditure per person, WYG has again utilised Experian Micromarketer G3 data, which provides detailed information on local consumer expenditure that takes into account the socio-economic characteristics of the local population. Experian is a widely



accepted source of expenditure and population data and is regularly used by WYG in assessing retail capacity.

8.08 The base year for the Experian expenditure data is 2011. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 10.1, which was published in September 2012. For the purposes of this Study, the following annual growth forecasts have been applied and adjusted to reflect the forecast in the proportion of expenditure that will be committed through special forms of trading (comprising ‘non-store retailing’, such as internet sales, TV shopping and so on) over the reporting period. For this Update, we have ‘stripped out’ any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian’s recommendation.

8.09 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store’s shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered ‘available’ to tangible retail destinations. Appendix 3 of Experian Retail Planner Briefing Note 10.1 states that:

‘Since the non-store retailing figures include supermarkets and other retailers that source internet goods sales from store space, the share of non-store retailing is over-stated from the point of view of those interested in physical retail outlets, particularly for convenience goods.’

8.10 Due to this ‘over-statement’, in making an allowance for expenditure committed via special forms of trading, we adopt Experian’s adjusted figure (provided at Appendix 3 of the Briefing Note) which accounts for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at **Table 8.2** is ‘stripped out’ of the identified expenditure as it is not available to stores within the Study Area.

Table 8.2: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2012	2.0%	9.9%
2017	3.1%	13.6%
2022	4.1%	16.0%
2028	4.6%	16.1%

Source: Experian Retail Planner Briefing Note 10.1 (September 2012)



8.11 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2012, 2017, 2022, 2027 and 2030. In doing so, our assessment takes into account both per capita retail expenditure growth and population change, as well as an allowance to exclude expenditure which is committed through SFT.

Table 8.3: Expenditure and SFT Growth Forecasts (per annum)

Year	Comparison (%)	Convenience (%)
2012	0.4	-0.1
2013	0.9	-0.3
2014	1.6	-0.2
2015	2.2	0.1
2016	2.2	0.4
2017	2.0	0.5
2018	2.1	0.5
2019	2.2	0.6
2020	2.3	0.7
2021	2.4	0.7
2022	2.6	0.8
2023	2.8	0.8
2024	2.9	0.8
2025	3.0	0.8
2026-2029	2.9 per annum	0.7 per annum

Source: Experian Retail Planner Briefing Note 10.1 (September 2012)

8.12 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers to levels broadly commensurate with those identified prior to the recession. In terms of convenience goods, Experian forecasts relatively modest average per annum expenditure increases of between nil and 0.5% between 2011 and 2013, before identifying increased anticipated growth of between 0.1% and 0.5% per annum between 2015 and 2018, and between 0.6% and 0.8% per annum between 2019 and



2028. However, WYG considers that the growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy’s performance over time. This can be re-assessed at the next five year review interval.

8.13 Using the above growth rates (excluding SFT) it is possible to produce expenditure estimates for each survey zone in 2012, 2017, 2022 and 2028. The assessment takes into account both retail expenditure growth and population change as well as allowance for estimated increases in SFT growth.

Convenience Goods Expenditure

8.14 It is estimated that, in 2012, the resident population of the Study Area generates some £1,079.4m of convenience goods expenditure. This is forecast to increase to £1,306.0m by 2028, which represents an increase of £226.5m (or 21%) between 2012 and 2028.

Table 8.4: Total Available Expenditure – Convenience (£m)

2011	2012	2017	2022	2028	Growth 2012-2017	Growth 2012-2022	Growth 2012-2028
1,072.3	1,079.4	1,167.9	1,248.8	1,306.0	88.5	169.4	226.5

Source: Table 2a of Appendix 7

Main Food and ‘Top-Up’ Shopping

8.15 For the purposes of this Study, the proportion of convenience goods expenditure directed to respondents’ main and top up food shopping destination has been derived directly from specific questions (Q4 and Q15) in the Household Survey and has been applied generically across the Study Area. Unlike the BRLS (2008) this update found that 79.9% of expenditure is directed to the main food shopping destination (bulk food shop) and approximately 20.1% is directed to ‘top up’ shopping destinations (i.e. regular purchases, such as milk, bread, and so on), illustrating that the proportion of expenditure committed through top up spending has increased by 3 percentage points since 2008.

8.16 By applying these expenditure estimates to the identified resident population of the Study Area, convenience goods expenditure on main food shopping is estimated to be approximately £862.1m, and ‘top up’ expenditure approximately £217.3m at 2012.



Comparison Goods Expenditure

8.17 In 2012, the resident population within the Study Area is identified as generating £1,507.9m of comparison goods expenditure. Given the forecast growth in population and expenditure, this is expected to increase to £2,430.1m by 2028. This represents an increase of £922.5m (or 61%) between 2012 and 2028. This is clearly a very significant increase and is a result of the forecast increase in catchment population and, in particular, the forecast high level of comparison goods expenditure growth over forthcoming years.

Table 8.5 Total Available Expenditure – Comparison (£m)

2011	2012	2017	2022	2028	Growth 2012-2017	Growth 2012-2022	Growth 2012-2028
1,490.6	1,507.9	1,709.9	1,981.7	2,430.1	202.0	473.8	922.2

Source: Table 7 of Appendix 7

8.18 For the purposes of this Study, comparison goods expenditure has been divided into seven sub-categories: 'Furniture', 'DIY and Gardening Goods', 'Electrical' (collectively referred to as bulky goods), 'Clothing & Footwear', 'Small Household Goods (including CD, DVD, Books)', Toys, Bicycles and Other Recreational Goods' and 'Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zone by zone basis. However, across the Study Area, the expenditure directed to each sub-category by residents within the Study Area is as follows.

Bulky Goods

'Furniture' – 10.5%
 'DIY and Gardening Goods' – 7.3%
 'Electrical' – 15.7%

Sub-Total – 33.5%

Non-Bulky Goods

'Clothing & Footwear' – 28.0%
 'Toys, Bicycles and Other Recreation Goods' – 12.5%
 'Small Household Goods (inc CDs, DVDs, Books)' – 23.3%
 'Chemist Goods' – 2.7%

Sub-Total – 66.5%

Market Share of Expenditure of the Five Principal Centres

8.19 Having estimated the level of expenditure which is generated by the resident population within the defined Study Area, it is necessary to identify the 'sphere of influence' of each of the principal centres and each centre's claimed market share of available expenditure. In order to do this in a meaningful way, it is necessary to focus the analysis of market share on those zones which immediately surround



each particular centre. For Bradford (located in Zone 14), the zones of greatest relevance are Zones 12, 13, 14 and 15; for Keighley (located on Zone 5), Zones 1, 2 and 5; for Ilkley (located in Zone 3), just Zone 3; for Shipley (located on Zone 18), Zones 16 and 17, and for Bingley (located in Zone 6), just Zone 6.

8.20 This update has involved the completion of 1,800 household telephone interviews within the defined Study Area. By analysing the results from the survey, it is possible to estimate the levels of expenditure which are directed towards each principal centre's shopping facilities. The market shares for the various expenditure categories were identified in Section 7. For this update, WYG has removed allowances to SFT unlike the BRLS (2008).

Table 8.6: Bradford District Market Shares by Location

Zone	Market Shares by Category (%)									TOTAL [^]
	Convenience Goods		Comparison Goods							
	Main Food	Top-up Food	Furniture	DIY	Electrical	Clothing & Footwear	Small H'hold	Recreation	Chemist	
Bradford city centre	3.4	3.7	28.9	21.8	40.6	30.2	30.2	35.1	26.0	18.0
Bingley town centre	0.5	2.0	1.2	1.1	0.3	0.3	0.7	0.3	2.7	0.8
Ilkley town centre	2.4	2.3	1.1	2.0	1.0	2.3	2.2	1.1	3.1	2.5
Keighley town centre	11.1	5.4	11.6	10.3	11.6	8.4	9.1	14.2	12.2	10.7
Shipley town centre	7.8	5.3	5.2	3.3	3.6	1.8	3.7	4.8	6.4	5.0
district centres	33.6	16.1	7.0	16.6	3.4	3.5	5.3	3.0	9.6	14.7
Local centres	6.4	28.6	7.4	5.5	0.9	0.4	6.4	4.4	13.2	6.3
Out-of-centre	13.3	16.7	4.3	19.8	10.8	1.6	1.9	3.6	2.0	8.9
district Sub-Total	78.5	80.1	66.7	80.4	72.2	48.5	59.4	66.6	75.2	66.9

Source: Bradford district Household Shopping Survey (2012)

[^] Based on cumulative market share of all categories (convenience goods and comparison goods)

Forecast Growth in Expenditure Attracted to Study Area



- 8.21 With forecast growth in convenience goods expenditure predicted to increase at an average of 0.50%²⁹ per annum across the whole of the period from 2012 to 2028, and with the Study Area population expected to grow from around 687,273 to 769,685 people over the same period, it is estimated that the Study Area will experience an increase in convenience goods expenditure of approximately £226.5m at 2028. Assuming a constant Study Area market share of 77.3%, this equates to an increase in retained (within Bradford district) convenience goods expenditure of approximately £175.1m at 2028.
- 8.22 The significant forecast increase in expenditure on comparison goods (an average of 2.3%²⁹ per annum increase in the period 2012 to 2028) would result in a further £922.2m of comparison goods expenditure being generated within the Study Area by 2028. Assuming a constant comparison goods market share of 59.5%, existing facilities within Bradford will capture around an additional £548.7m of comparison goods expenditure by 2028.
- 8.23 This analysis is based on 'rolling forward' the current market share within the Study Area for each category of goods. This approach of rolling forward existing market share is in line with standard practice and does not take into account the desirability or need to 'claw back' leakage between expenditure directed to centres elsewhere, which might be achieved through improvements in retail provision. However, in this regard it should be noted that the current comparison goods market share of the Study Area is considered reasonably healthy (59.5% market share for Bradford district, but 68.5% for the whole Study Area (including facilities in the Study Area but outside Bradford, i.e. parts of western Leeds, parts of south Craven, northern parts of Kirklees and eastern parts of Calderdale), particularly high retention (60%) of comparison goods spend is apparent in the 'core' Zones (1, 2, 3, 5, 6, 7, 12, 13, 14, 15 and 16) covering facilities in Bradford district.
- 8.24 In order for the Study Area to capture the significant growth in retail expenditure which is forecast (particularly for comparison goods), 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 future Study Area retention rate does not decline.

²⁹ Growth rates taken from Appendix 3 of Experian Retail Planner Briefing Note 10.1 (September 2012), and are adjusted to take into consideration SFT allowances.



8.25 If an excess of comparison or convenience goods expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns;
- The current capacity and efficiency of retail floorspace within the established centres;
- Future changes in business productivity and current development commitments; and
- Potential changes in forecast expenditure growth in the future.



9.0 RETAIL CAPACITY AND THE ROLE OF THE EXISTING CENTRES

- 9.01 The quantitative modelling for the capacity assessment has been undertaken for both convenience and comparison goods shopping. This approach is advocated by the Practice Guidance on Need, Impact and the Sequential Approach, which states that quantitative need assessments should have regard to relevant market information and economic data, and should include an 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 forecast improvements in retail sales density.
- 9.02 For the purposes of this capacity exercise, WYG has primarily examined the need for new convenience and comparison goods floorspace. Indicative capacity assessments are provided for 2017, together with 2022 and 2028, but any assessment in the long-term should be viewed with caution. Any identified need or capacity identified beyond 2017 is not justification for new retail floorspace outside of centres, as this could prejudice the implementation of emerging town centre redevelopment strategies and the development of more central sites which, although not available for retail development at present, may become available between now and 2017 or after at 2022 and 2028. Tables providing full details of inputs and the step-by-step application of the methodology set out below are provided at **Appendix 7**.

Capacity Formula

- 9.03 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 expenditure is estimated with reference to a number of factors, namely:

- 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 with the Study Area. The turnover of existing facilities is calculated using the Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.

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 suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 9.04 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as B&Q, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Capacity for Future Convenience Goods

- 9.05 In order to ascertain the likely need for additional convenience goods floorspace for Bradford, it is first necessary to consider the current provision. For each centre, it is assumed that future expenditure available to the centre will be based upon its existing market share. Given that the district is already relatively well provided for with a variety of foodstore operators, it is assumed that the future convenience goods expenditure available to Bradford will be commensurate to its current market share. This current market share is calculated by examining the trading performance of stores in the wider Study Area.
- 9.06 Our analysis of the market share of facilities in Bradford district indicates that the current level of trade passing through food facilities originating from inside the Study Area is £846.7m. This represents 77.3% (and allows for an additional 1.5% in inflow) of the total convenience goods expenditure generated from within the defined Study Area.



Table 9.1: Estimated Baseline Capacity for Convenience Goods Facilities in Bradford District

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	846.7	846.7	0.0
2017	844.2	916.2	72.0
2022	850.1	979.6	129.5
2028	860.4	1024.4	164.1

Source: Table 24 (Table 1), Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2011)

² Assumes constant market share (77.3%) claimed by facilities within Bradford district (includes inflow of 1.5%)
2011 Prices

- 9.07 On this basis, WYG has 'rolled forward' Bradford district's current market share to examine the likely convenience goods floorspace required to allow the centres' current position within the retail hierarchy to be maintained.
- 9.08 WYG estimates that between 2012 and 2017, an additional £72.0m originating from the Study Area will be spent on all convenience goods (main and top-up) within the district. The identified surplus is relatively large, even in the short term, despite the depressed growth rates by Experian, due to the significant increase in Study Area population forecast in the period to 2017. The identified expenditure surplus is forecast to increase to £129.5m by 2022 and £164.1m by 2028 as detailed in **Table 9.1**.
- 9.09 WYG understand that the district is subject to significant level of proposed convenience goods floorspace through extant planning permissions. Drawing on information from BMDC's Retail Floorspace Update (2012), WYG understand that there is approximately 10,650 sq.m (net) of convenience good floorspace committed across the district. WYG estimate that the proposed floorspace will have an estimated turnover of £104.0m if trading at 2017. As shown in **Table 9.2**, this development will act to negate any need for further convenience goods development in the immediate and short term (up to 2017). However, at 2022 there will be capacity for between 2,000 sq.m (net) and 4,900 sq.m (net) depending on the end operator(s). During the entire reporting period up to 2028 and, based on the existing market share being retained, this will increase to between 4,500 sq.m (net) and 11,400 sq.m (net).



Table 9.2: Baseline Quantitative Need for Convenience Goods Floorspace in Bradford District – Extant Planning Consents

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	104.3	-104.3	-8,300	-20,900
2017	72.0	104.0	-32.0	-2,500	-6,400
2022	129.5	104.7	24.8	2,000	4,900
2028	164.1	106.0	58.1	4,500	11,400

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

- 9.10 Notwithstanding the above baseline position, **Table 9.3** below sets out the survey-derived turnover of all food retail destinations within the district. For each destination, the survey-derived turnover is compared to a ‘benchmark’ turnover that indicates the level of turnover that the store would generally be expected to attract, based on company average trading levels. A judgement can then be made on the trading performance of existing facilities based on the comparison of the survey-derived turnover with the expected turnover (based on nationally published trading information from Mintel and Verdict) of existing provision.
- 9.11 The ‘benchmark’ turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading ‘at equilibrium’ (i.e. the survey-derived turnover equates to the expected level of turnover). On each occasion, given the scale of the catchment and the stores’ relatively central location within it, it has been assumed that all of the store’s turnover will be derived from within the Study Area.
- 9.12 Furthermore, as this assessment is based upon a ‘goods based’ approach which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for each



operator³⁰ has been applied to the estimated net floorspace of each foodstore. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

- 9.13 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and understate the role of smaller stores and independent retailers.
- 9.14 **Table 9.3** indicates that, across the main convenience goods provisions considered together, the expected turnover of existing convenience goods shopping provision is £795.1m per annum, which compares to a survey-derived turnover of £834.2m per annum. These figures do not allow for any inflow. This suggests that, cumulatively, convenience goods floorspace is effectively 'overtrading' by some £39.1m per annum. The vast majority of this overtrading occurs in Zones 5 (Keighley), 13 (Great Horton and Mayo Avenue) and Zone 16 (Shipley) suggesting there is a current undersupply of convenience goods floorspace within these key areas. This is comparable to the position found in 2008. However, we also note that there is undertrading occurring in Zone 3 (Ilkley), Zone 8 and Zone 14 (Bradford).
- 9.15 Accepting the caveat provided at paragraph 9.11, the survey indicates that a number of stores are performing particularly strongly in and around the main five town centres, in particular the Aldi at Greseley Road in Keighley, the Morrisons store at Worth Way in Keighley as well as the new Asda store at Bingley Street (which overtraded by 430%, 59% and 41% respectively), and the Co-operative Food at 5Rise Shopping Centre and local shops in Bingley also overtraded (by 31%). In terms of Bradford, the Morrisons store at the Westgate is still overtrading by approximately 109%; conversely the Tesco at Valley Road is still significantly undertrading. In terms of Shipley, the results show that the Asda store is overtrading by nearly 104% against average company benchmarks and that the Aldi store at Tony Miller Approach is significantly overtrading (by 470%). The results also found that the supermarkets at Great Horton, Mayo Avenue, Girington district centres are all overtrading, facilities in Thornbury are trading at expected levels, whilst facilities in Tong Street and Greengates district centres are performing below expected levels.
- 9.16 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how overtrading may be affected by future growth in expenditure. Accordingly, **Tables 9.3,**

³⁰ Taken from Verdict Food & Grocer Retailers (2011)



9.9, 9.11, 9.13, 9.15 and 9.17 set out the anticipated increases in expenditure which will be available to each one of the five main town centres, assuming that each centre's current market share is maintained. In each case, it is assumed that turnover of existing floorspace will improve at an average rate of 0.1% per annum up to 2019 and then 0.2% thereafter through improvements in floorspace efficiency as set out by Experian Retail Planner 10.1. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience shopping needs.

Table 9.3: Trading Performance (2012) of Current Foodstores in Bradford's Principal Centres

Store	Net F'space (sq.m)	Net Conv F'space (sq.m)	T'over per sq.m (£)	Benchmark Turnover (£m)	Survey Estimate (£m)
ZONE 3					
Ilkley town centre					
Booths, Leeds Road	1,740	1,392	8,500	11.8	6.9
Co-operative Food, Brook Street	115	99	8,665	0.9	0.3
Marks and Spencer, Station Plaza	594	563	11,048	6.2	1.5
Tesco, Springs Lane	1,662	1,104	12,522	13.8	17.8
Local Shops	1,584	1,584	3,000	4.8	4.1
Edge / Out-of-centre					
Morrisons, Bolton Bridge Road, Ilkley	270	243	12,620	3.1	2.1
Tesco Express, Ben Rhydding, Ilkley	169	152	12,522	1.9	1.6
Sub Total				43.1	34.4
Local centres					
Local Shops, Addingham	108	108	2,000	0.2	0.1
Co-op Food, Bridge Road, Silsden	1,115	954	8,665	8.3	2.7
Local Stores, Silsden	342	342	2,000	0.7	0.4
Sub-Total Zone 3	-	-	-	51.6	37.7
ZONE 5					
Keighley town centre					
Aldi, Gresley Road, Keighley	661	456	4,670	2.1	11.3
Farmfoods, Cooke Lane, Keighley	248	248	3,000	0.7	1.0
Iceland, Gresley Road, Keighley	446	435	6,467	2.8	0.5
Marks and Spencer, Low Street, Keighley	520	492	11,048	5.4	0.3
Morrisons, Worth Way, Keighley	3,523	2,787	12,620	35.2	56.0
Sainsbury's, Cavendish Street, Keighley	4,087	3,024	12,080	36.5	36.5
Jack Fulton Frozen Food, Towngate, Keighley	32	32	3,000	0.1	0.1
Local Shops, Keighley	1,424	1,424	3,000	4.3	4.9
Sub Total				87.2	110.6
Edge / Out-of-centre					
Asda, Bingley Street, Keighley	3,890	2,230	14,124	31.5	44.5
Co-operative Food, Broomhill Avenue	177	152	8,665	1.3	2.3
Local Shops, Thwaites Brow				0.1	0.1
Sub-Total Zone 5	-	-	-	120.1	157.5
ZONE 6					
Bingley town centre					
Co-op, 5Rise Shopping Centre	901	771	8,665	6.7	7.9
Local Shops	232	232	3,000	0.7	1.7



Sub Total				7.4	9.7
Local centres					
Cullingworth (Local centre 31)					
Co-operative Food, Workshop, Greenside Ln	116	99	8,665	0.9	1.7
Local Shops	94	94	2,000	0.2	0.0
Crossflatts (local centre 8)					
Local shops, Crossflatts	120	120	2,000	0.2	0.3
Cottingley (Local centre 33)					
Local Shops, Cottingley	384	384	2,000	0.8	0.6
Denholme (Local centre 34)					
Co-operative Food, School Street	290	248	8,665	2.1	0.5
Wilsden (Local centre 32)					
Co-operative Food, Royd Street, Wilsden	337	288	8,665	2.5	0.9
Local Shops, Wilsden	95	95	2,000	0.2	0.0
Out-of-centre					
Spar, Morningson Road, Bingley	74	70	7,319	0.5	0.3
Tesco Express, Keighley Road, Crossflatts	248	223	12,522	2.8	1.7
Sub-Total Zone 6	-	-	-	17.6	15.7
ZONE 14					
Bradford city centre					
Marks and Spencers, Darley Street	725	687	11,048	7.6	1.9
Morrison's, Westgate	1,342	1,062	12,620	13.4	28.0
Tesco Express, Sunbridge	200	180	12,522	2.3	0.9
Local Shops,	1,504	1,504	3,000	4.5	4.8
Sub Total				27.7	35.6
Girlington district centre					
Morrisons, Victoria Shopping centre	4,565	3,611	12,620	45.6	55.5
Local Shops	1,771	1,771	2,000	3.5	2.8
Sub Total				49.1	58.4
Carlisle Road / Whetley Hill (Local centre 22)					
Local Shops	645	645	2,000	1.3	0.0
Lidget Green (Local centre 35)					
Co-operative Food, Beckside Rd	186	159	8,665	1.4	0.2
Local Shops	100	100	2,000	0.2	0.2
Oak Lane/Manningham (Local centre 20)					
Local Shops	742	742	2,000	1.5	0.4
Princeville (Local centre 36)					
Local Shops	301	301	2,000	0.6	1.0
Out-of-centre					
Aldi, Valley Road, Bradford	670	462	4,670	2.2	5.5
Co-operative Food, Sunwin SS, Thornton Rd	54	47	8,665	0.4	0.5
Co-operative Food, Legrams Lane	111	95	8,665	0.8	0.7
Farmfoods, Valley Road				1.3	1.3
Lidl, Ingleby Road, Bradford, Near Lidget Green	752	596	3,485	2.1	2.1
Local Shops, Scholemoor Lane				0.4	0.4
Tesco, Bradford Peel centre, Valley Road	6,558	3,869	12,522	48.5	19.3
Tesco Express (former Netto), Manningham Ln	784	706	12,522	8.8	0.2
Sub-Total Zone 14	-	-	-	146.3	126.4
ZONE 16					
Shipley town centre					
Aldi, Tony Miller Approach, Briggate, Shipley	754	520	4,670	2.4	13.8
Asda, Manor Lane, Shipley	3,576	2,112	14,124	29.8	60.8
Local Shops, Shipley	672	672	3,000	2.0	2.8



Sub Total				34.3	77.5
Wrose (Local centre 16)					
Co-op Late Shops, Wrose Road, Shipley	249	213	8,665	1.8	0.4
Frizinghall (Local centre 17)					
Local Stores, Keighley Road, Bradford	185	185	2,000	0.4	0.4
Out-of-centre					
Sainsbury's, The Parkside, Keighley Road	194	174	12,080	2.1	0.1
Sub-Total Zone 16	-	-	-	38.6	78.3
Summary Zone 1	(includes Cross Roads, Howorth, Oakworth local centres)			7.1	5.8
Summary Zone 2	(includes Steeton with Eastburn local centre)			5.9	4.1
Summary Zone 4	(includes Burnley-in-Wharfedale, Menston, Riddlesden, Eldwick local centres)			6.0	3.8
Summary Zone 7	(includes Allerton, Duckworth Lane, Heaton, Saltaire local centres)			20.1	11.7
Summary Zone 8	(includes Clayton, Queensbury, Thornton local centres)			39.1	26.7
Summary Zone 10	(includes Buttershaw, Wyke, Low Moor local centres)			32.0	35.5
Summary Zone 11	(includes Tong Street district centre, Holme Wood local centre)			6.3	4.8
Summary Zone 12	(includes Bakerend Road, Laisterdyke, Sticker Lane, Leeds Road local centres)			44.3	53.4
Summary Zone 13	(includes Great Horton, Mayo Avenue district centres, Bankfoot, Marshfields, Shearbridge/Listerhills, Wibsey local centres)			96.2	119.7
Summary Zone 15	(includes Thornbury district centre and Bolton Junction, Eccleshill, Undercliffe local centres)			57.4	51.7
Summary Zone 17	(includes Baildon)			10.5	7.1
Summary Zone 18	(includes Greengates & Five Lane Ends district centres and Idle)			95.9	94.3
Total	-	-	-	795.1	834.2

Table 5, Appendix 7 at 2011 prices

- 9.17 Accepting the caveat provided at paragraph 9.11, the survey indicates that a number of stores are performing particularly strongly. As previously noted, some of these are derived from central locations in Bradford, Keighley and Shipley, but there are some strong performing stores located in the Bradford's district and local centres, including the Morrisons stores at Mayo Avenue, Gillingham, Five Lane Ends and Thornbury, the Tesco at Buttershaw and Great Horton. The results also showed that the following local centres were performing well in terms of expenditure retention: Cullingworth, Saltaire, Thornton, Buttershaw, Wyke, Leeds Road, Princeville and Eccleshill.
- 9.18 It should be noted that, although the level of overtrading at the above identified stores is high, such trading performances are not uncommon and will occur at numerous stores operated by the 'leading five' supermarket retailers.
- 9.19 In order to appraise the need for additional convenience goods retail floorspace, we have first considered the future capacity based on future growth in expenditure only (**Table 9.4**). Accordingly, **Table 9.4** draws on the overtrading in **Table 9.3** but then considers this against the anticipated increase in expenditure which will be available to the district's convenience goods retail facilities, assuming that the current market share is maintained. It is also assumed that the turnover of existing

floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner 10.1.

Table 9.4: Estimated 'Benchmark' Capacity for Convenience Goods Facilities in Bradford District

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	807.1	846.7	39.7
2017	804.6	916.2	111.5
2022	810.3	979.6	169.3
2028	820.0	1,024.4	204.4

Table 24a (Table 1) of Appendix 7

¹ Benchmark turnover from Table 9.3 above, has been allowed to increase turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share (77.3%) claimed by facilities within Bradford district (includes inflow of 1.5%) 2011 Prices

9.20 **Table 9.4** indicates that, through increases in both population and expenditure applied to the current overtrading and inclusion of inflow from beyond the Study Area, £39.7m convenience goods expenditure surplus is identified at 2012 rising to £111.5m at 2017, to £169.3m at 2022, and up to £204.4m at 2028 (based on the existing market share being retained). As set out earlier, there are a significant level of extant planning permission for new convenience retail floorspace that will absorb this estimated capacity.

Table 9.5: Quantitative (Benchmark) Need for Additional Convenience Goods Floorspace in Bradford District – After Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	39.7	104.3	-64.6	-5,100	-12,900
2017	111.5	104.0	7.6	600	1,500
2022	169.3	104.7	64.6	5,100	12,900
2028	204.4	106.0	98.4	7,700	19,400

Table 24a (Table 1b) of Appendix 7

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012) At 2011 prices

9.21 WYG understand there is 10,650 sq.m (net) of convenience good floorspace proposed across the district (extant consents). WYG estimate that the proposed floorspace will have an estimated turnover of £104.0m once all trading at 2017. As shown in **Table 9.5**, extant permissions effectively negate



any need for major new convenience goods development in the immediate future, based on the existing market share being retained (i.e. the status quo). However, at 2017 there will be capacity for a nominal level of new net floorspace (between 600 and 1,500 sq.m (net)), this will increase to between 5,100 sq.m (net) and 12,900 sq.m (net) at 2022 and increase again to 7,700 sq.m (net) and 19,400 sq.m (net) by 2028.

- 9.22 The results show that given the significant levels of extant planning permission there is limited residual capacity based on the current market share being retained in the immediate and short term but capacity is likely to be available in the later part of the plan period (beyond 2022). The assessment will now consider the estimated capacity for each of main town centres within the district in more detail.

Bradford City Centre

- 9.23 **Table 9.6** indicates that, at 2012, a expenditure deficit of -£17.9m (below the expected benchmark turnover) is attributed to facilities in and around Bradford city centre (we have only considered city centre and edge and out-of-centre provision rather than considering all facilities (district and local centres) within Zone 14, in which Bradford sits). This deficit is largely caused by the under trading Tesco at Valley Road (Peel centre), which has an estimated benchmark of £48.5m but derived turnover was only around £19.3m from the household survey (under trading by £29.2m). If this store was excluded from the figures then the overall remaining stores are trading above their expected benchmark turnovers (by £7.9m).
- 9.24 **Table 9.6** shows that there is an apparent lack of need to support new convenience goods floorspace in Bradford city centre. **Table 9.6** provides a breakdown of the capacity for additional convenience goods floorspace in monetary terms. Assuming existing convenience goods facilities maintain their existing market share at 5.7%, after taking into account floorspace efficiencies and existing commitments, it is assumed that this deficit will decline to -£12.6m at 2017, decreasing to -£8.5m at 2022 and to -£6.2m at 2028. However, WYG note that the market share of convenience goods for facilities in and around the city centre is low at 5.7%, with only Bingley and Ilkley of the five centres having a lower share of the market. However, WYG note that Bradford is surrounded by a number of district centres which are anchored by strong performing anchor foodstores, namely the Tesco at Great Horton, the Morrison stores at Mayo Avenue and Girdlington, as well as the out-of-centre Asda at Rooley Lane, which together restrict the convenience goods performance of the city centre.



Table 9.6: Estimated Capacity for Convenience Goods Facilities in Bradford City Centre

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	79.7	61.8	-17.9
2017	79.4	66.8	-12.6
2022	80.0	71.4	-8.5
2028	80.9	74.7	-6.2

Table 24a (Table 3) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share of 5.7% across Study Area (assumes no inflow)

At 2011 prices

9.25 WYG understand there is a further 642 sq.m (net) of convenience good floorspace proposed in and around the city centre (through extant planning permissions). WYG estimate that the proposed floorspace will have an estimated turnover of £3.2m if trading at 2012 and 2017. WYG note that this does not take into account the new Asda store being developed at Cemetery Road which we estimate will have a turnover of approximately £30.0m. As shown in **Table 9.7**, after account of extant planning permissions there is no identifiable quantitative need for further convenience goods development over the entire reporting period up to 2028, based on the existing market share being retained (i.e. the status quo).

Table 9.7: Baseline Quantitative Need for Convenience Goods Floorspace in Bradford City – Extant Planning Consents

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	-17.9	3.2	-21.1	-1,700	-4,200
2017	-12.6	3.2	-15.8	-1,300	-3,200
2022	-8.5	3.2	-11.8	-900	-2,300
2028	-6.2	3.3	-9.5	-700	-1,900

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

At 2011 prices



Keighley

9.26 **Table 9.8** sets out Keighley's survey-derived convenience goods turnover and compares this with the expected benchmark turnover of the existing provision. Despite the introduction of Asda in 2009, significant overtrading still occurs at the Morrisons store at Worth Way. The Aldi store at Greseley Road is also overtrading following its increased popularity since 2008. The results also show the Sainsbury's at Cavendish Street is still trading around benchmark. The new Asda is also trading above its expected benchmark turnover, turning over £44.5m compared to a benchmark of £31.5m. With the exception of the food element within M&S and the Iceland stores, other convenience facilities appear to all be trading either in line with or above their expected benchmarks. As set out in Section 7, the introduction of Asda has helped increase the overall retention of convenience goods trade since 2008, where Keighley retains 14.8% market share compared to 12.9% in 2008. Based on this overtrading, there is currently an expenditure surplus of £38.1m identified at 2012, rising to £54.5m by 2017, to £65.9m by 2022 and to £73.0m by 2028. This allows for an inflow of 1.7% of turnover from outside the Study Area.

Table 9.8: Estimated Capacity for Convenience Goods Facilities Keighley (Zone 5)

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	122.2	160.2	38.1
2017	121.8	176.3	54.5
2022	122.6	188.5	65.9
2028	124.1	197.1	73.0

Table 24a (Table 2) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2011)

² Assumes constant market share claimed by facilities within Keighley at 14.8% from Study Area (assumes inflow of 1.7%) At 2011 prices

9.27 WYG understand there is a further 2,862 sq.m (net) of convenience good floorspace proposed (through extant planning permissions) in edge-of-centre-of-centre locations around Keighley. These include the land south of Church Street (LPA Ref: 10/03522/FUL) and convenience floorspace within the proposed Worth Valley Shopping Centre on Greseley Road (LPA Ref: 11/05268/MAF (1)) as well as 594 sq.m (net) at Water Lane (LPA Ref: 05/05803/FUL). WYG estimate that the proposed floorspace will have an estimated turnover of £26.3m if all trading at 2017 and would absorb 48% of the identified capacity. As shown in **Table 9.9**, after taking account of extant planning permissions, there is notable capacity for new convenience goods floorspace in the short to medium term (i.e. up to 2017) based on the existing market share being retained (i.e. the status quo), with capacity identified between 2,200 sq.m (net) and 5,700 sq.m (net). After 2022, this is forecast to increase to between



3,200 sq.m (net) and 7,900 sq.m (net). WYG conclude that in the short term there is no need to consider allocating new convenience goods floorspace in Keighley and this should be focused towards the delivery of any convenience goods retailing in the Worth Valley Shopping Centre to help anchor the rest of the town centre.

Table 9.9: Baseline Quantitative Need for Convenience Goods Floorspace in Keighley – Extant Planning Consents

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	38.1	26.4	11.7	900	2,300
2017	54.5	26.3	28.2	2,200	5,700
2022	65.9	26.5	39.4	3,100	7,900
2028	73.0	26.8	46.2	3,600	9,100

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

At 2011 prices

Ilkley

9.28 Ilkley's collective convenience goods provision attracts less expenditure than its expected benchmark turnover, whereby £34.4m is retained from the Study Area compared to estimated benchmark of £42.4m. This results in an estimated expenditure deficit of -£8.1m at 2012, declining to -£5.1m by 2017, to -£2.8m by 2022 and to a deficit of £1.5m by 2028. The results show that on balance existing provision is trading at below expected levels. However, the survey also indicates that the Tesco store on Spring Lane is trading above its benchmark by £4.0m.

Table 9.10: Estimated Capacity for Convenience Goods Facilities in Ilkley (Zone 3)

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	42.4	34.4	-8.1
2017	42.3	37.2	-5.1
2022	42.6	39.8	-2.8
2028	43.1	41.6	-1.5

Table 24a (Table 4) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share claimed by Ilkley's facilities at 3.2% % from Study Area (assumes no inflow)

At 2011 prices



9.29 In 2010 Tesco secured planning permission (LPA Ref: 09/00857/FUL (2)) for a replacement foodstore which including closing down the existing store on Springs Lane, and relocating to the former Spooner site at Railway Road. The replacement foodstore included a net increase of 348 sq.m (net) of convenience goods floorspace. WYG estimate that once implemented this will have an uplift in benchmark turnover of £4.3m by 2017. As shown in **Table 9.11**, after taking account this commitment there is no identifiable quantitative need for further convenience goods development over the entire future plan period to 2028, based on the existing market share being retained. Therefore, WYG conclude that there is no need to consider new sites for convenience goods retailing in the short to long term as the proposed Tesco enhanced store will meet the future needs of the community. We would also recommend that the post impact of the new Tesco store is monitored subsequent to its implementation.

Table 9.11: Baseline Quantitative Need for Convenience Goods Floorspace in Ilkley – Extant Planning Consents

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	-8.1	4.4	-12.4	-1,000	-2,500
2017	-5.1	4.3	-9.5	-800	-1,900
2022	-2.8	4.4	-7.2	-600	-1,400
2028	-1.5	4.4	-6.0	-500	-1,200

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

Shipley

9.30 Shipley’s collective convenience goods provision attracts significantly more expenditure than would be expected through reference to the expected benchmark turnover, whereby £80.8m is retained from the Study Area compared to estimated benchmark of £39.8m. This results in a very significant estimated expenditure surplus of £41.0m at 2012, rising to £47.7m by 2017, to £53.5m by 2022 and to £57.3m by 2028. The surplus is principally due to the overtrading of the Asda store at Manor Lane in the town centre as well as the overtrading, which is now evident at the Aldi store on Tony Miller Approach. The results indicate that Shipley benefits from inflow of 3.2% from outside the Study Area.



Table 9.12: Estimated Capacity for Convenience Goods Facilities in Shipley (Zone 16)

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	39.8	80.8	41.0
2017	39.7	87.4	47.7
2022	40.0	93.5	53.5
2028	40.5	97.8	57.3

Table 24a (Table 5) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share claimed by Shipley's facilities at 7.3% from Study Area (assumes inflow of 3.2%) At 2011 prices

- 9.31 Since the publication of the BRLS in 2008, there have been relatively small scale changes to the convenience goods landscape in Shipley mainly involving change of use applications. In terms of extant planning permissions, there is a long established proposal to introduce a mezzanine to the existing Asda store. WYG estimate that, if implemented, this will introduce an additional 937 sq.m of convenience goods expenditure. Extensions to stores can trade less strongly than existing floorspace, and we have therefore assumed that the additional floorspace will trade at 50% of benchmark. The extension would therefore trade at £6.6m at 2017 if fully implemented and would reduce the residual capacity from £47.7m to £41.1m at 2017.
- 9.32 WYG also estimate that the proposed (LPA Ref: 09/04744/FUL) Asda at Cemetery Road in Zone 14 and the new Sainsbury's in Bingley (LPA Ref: 11/00940/MAF) once implemented, both are likely to divert 20% of trade (or £6m) from the current Asda store in Shipley (based on the current trade claims of the Asda Shipley store on expenditure in Zones 6, 7, 8 and 14), which is likely to reduce the residual capacity at 2017 to £35.1m.
- 9.33 The results (**Table 9.13**) show that over the next five year period there will be residual capacity for between 2,800 sq.m (net) and 7,000 sq.m (net) (depending on end operator) of convenience goods floorspace to 2017. This is based on a residual capacity of approximately £35.1m at 2017. There are currently detailed pre-application discussions taking place on three sites on the edge of Shipley town centre, at this time and given the identified capacity WYG recommend that the Council should prioritise on allocating just one site to help address the current overtrading of the Asda and Aldi stores. Given Asda anchors the existing town centre, it currently encourages a high propensity of linked trips with the rest of the town centre, therefore preference would be to consider a site which would create a well designed and well connected link with the rest of the town centre. This approach will ensure that any trade diversion from the Asda does not affect the likelihood of convenience goods



shoppers visiting the rest of the town centre and therefore ensuring that existing linked trips are not significantly diluted.

Table 9.13: Quantitative Need for Additional Convenience Goods Floorspace in Shipley (Zone 16) – After Extant Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	41.0	6.6	34.4	2,700	6,900
2017	47.7	12.6	35.1	2,800	7,000
2022	53.5	12.7	40.8	3,200	8,100
2028	57.3	12.8	44.5	3,500	8,800

Table 24a (Table 5b) of Appendix 7

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading four supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Assumed 20% of trade from proposed Asda at Cemetery Road and Sainsbury's at Bingley will be diverted from the Asda at Shipley, and allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012) At 2011 prices

Bingley

9.34 Convenience goods facilities in Bingley town centre (excludes other local centres in Zone 6) collectively attract more expenditure than would be expected through reference to the expected benchmark turnover, whereby £9.8m is retained from the Study Area compared to estimated benchmark of £7.5m. This results in an estimated expenditure surplus of £2.3m at 2012, rising to £9.7m by 2017, to £10.9m by 2022 and to £11.6m by 2028. These figures include a 1.0% inflow from outside the Study Area. The surplus is principally due to the overtrading of the new Co-operative Food store in the new 5Rise Shopping Centre which was implemented in 2009 and, as previously stated, has helped the town centre claim more main and top up food expenditure than previously claimed in 2008.

Table 9.14: Estimated Capacity for Convenience Goods Facilities in Bingley (Zone 6)

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	7.5	9.8	2.3
2017	7.4	17.2	9.7
2022	7.5	18.3	10.9
2028	7.6	19.2	11.6

Table 24a (Table 6) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share claimed by Bingley's facilities at 1.5% from Study Area (assumes inflow of 1.0%) At 2011 prices



9.35 In addition to the recent redevelopment of 5Rise Shopping Centre in 2009, Bingley town centre benefits from proposals for a new Sainsbury’s foodstore (LPA Ref: 11/00940/MAF) which will involve the demolition of the former Bradford and Bingley head office on Main Street. The foodstore has a proposed net convenience sales area of 2,973 sq.m. WYG estimate that the foodstore will have an estimated turnover of £35.8m at 2017 if implemented. **Table 9.15** identifies that, after taking into the proposed Sainsbury’s extant planning permission, there is no identifiable quantitative need for further convenience goods development over the entire future plan period up to 2028, based on the existing market share being retained. Given the relatively localised role of Bingley, the introduction of Sainsbury’s to the town centre will elevate Bingley’s position in the shopping hierarchy and is likely to increase its current (1.5%) convenience goods market share to a level more comparable with Shipley and Ilkley (circa 4% to 5% of the market). WYG believe that the new Sainsbury’s store will bring significant qualitative improvements to the town centre once implemented and will build on the success of the 5Rise Shopping Centre.

Table 9.15: Baseline Quantitative Need for Convenience Goods Floorspace in Bingley – Extant Planning Consents

Year	Convenience Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	2.3	35.9	-33.6	-2,700	-6,700
2017	9.7	35.8	-26.1	-2,100	-5,200
2022	10.9	36.1	-25.2	-2,000	-5,000
2028	11.6	36.5	-24.9	-1,900	-4,900

¹ Average sales density assumed to be £12,600 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2011)

² Average sales density assumed to be £5,000 per sq.m

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

9.36 WYG would advise, subject to the implementation of the Sainsbury’s at Main Street, that there is no requirement for BMDC to consider allocating any future sites to meet any identified quantitative and qualitative capacity, as the current commitments should meet the long term needs of Bingley’s resident community.

Capacity for Future Comparison Goods

9.37 As highlighted in Section 4 (and within Appendix 1) of this report, the five principal centres contain a varied range of comparison goods floorspace (including retail warehousing, high street multiples,



independent retailers, and so on), with Bradford city centre having by far the highest level of comparison goods floorspace, equating to 45,870 sq.m (gross). Keighley town centre has the second highest level of comparison goods floorspace in the district with 30,700 sq.m (gross) and is closely followed by Foster Square Retail Park located on the edge of Bradford city centre, which has approximately 26,000 sq.m of gross floorspace. Ilkley has the fourth largest amount of comparison goods floorspace (11,000 sq.m gross), but this is smaller in nature given its historical built environment content. It is broadly comparable to Shipley, which has 9,600 sq.m (gross) of comparison goods floorspace. Bingley has the lowest level of comparison floorspace with 3,600 sq.m (gross) which is comparable to the retail warehousing at the Peel centre and Manningham Lane. Given the diverse range of retailers trading in and outside the Study Area, it is considerably more difficult to accurately assess a likely 'benchmark' turnover for each comparison goods facility. Therefore, the most accurate way to estimate the turnover of existing retail facilities is to analyse the market share of each retail destination identified by the Household Survey results.

Bradford District's Capacity

- 9.38 Our analysis of the market share of facilities across the district indicates that at 2012 the level of trade which originates from within the Study Area and which passes through non-food facilities is £897.7m, this includes £429.8m spent in Bradford city centre (including Foster Square), £201.4 in Keighley (including edge and out-of-centre retail parks and foodstores), £35.3m in Ilkley, £52.5m in Shipley (again including edge and out-of-centre retail parks and destinations), £10.8m in Bingley and £73.6m across the defined district centres (i.e. Mayo Avenue, Girdlington etc) and £57.9m across the network of local centres (with the remainder £74.0m spent at other out-of-centre facilities). Cumulatively, this expenditure (£897.7m) represents 59.5% of the total comparison goods expenditure generated from within the defined Study Area. The results of the in-street survey found that 2.9% of visitors were from outside the Study Area; this level of inflow has therefore been applied. Due to difficulties in ascertaining accurate floorspace figures and reasonable benchmark turnovers for differing stores which include a high proportion of independent traders, comparison goods facilities are considered to be trading 'in equilibrium' at the base year of 2012. From our knowledge of the centres, we consider the turnover identified by the Household Survey to be broadly in line with expectations and the assumption of the current trading performance being 'in equilibrium' is considered to be robust.

Table 9.16: Estimated Capacity for Comparison Goods Facilities in Bradford District

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	923.7	923.7	0.0
2017	1,009.9	1,047.5	37.6
2022	1,113.9	1,214.0	100.1
2028	1,239.7	1,488.6	248.9

Table 26 (Table 1) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)² Assumes constant market share within the Study Area (59.5%) (includes inflow of 2.9%)

At 2011 prices

- 9.39 On this basis, WYG has 'rolled forward' Bradford's global market share to examine the likely comparison goods floorspace required to allow the centres' current position within the retail hierarchy to be maintained.
- 9.40 Accordingly, given the forecast increases in comparison goods expenditure and Study Area population, WYG estimate that between 2012 and 2017, an additional £37.6m originating from the Study Area (with allowances for inflow) will be spent on all comparison goods within the district. This identified surplus is relatively modest in the short term due to the current repressed market conditions limited increases in comparison goods spending forecast by Experian over the short term as well as adjustments made to SFT (non store sales). However, the identified expenditure surplus is forecast to increase to £100.1m by 2022 and £248.9m by 2028 as growth rates increase, and after estimated SFT growth stabilises (which is forecast to occur around 2020).
- 9.41 Since the publication of the BRLS in 2008, and drawing on information from BMDC's Retail Floorspace Update (2012), a significant quantum of comparison goods floorspace has been built out. However, there is a further 41,500 sq.m (net) of comparison good floorspace proposed across the district (through extant consents). WYG estimate that the proposed floorspace will have an estimated turnover of £226.0m if all were implemented and fully trading at 2017. Most of this commitment is provided through the 51,500 sq.m (gross) Westfield Broadway Centre redevelopment of Bradford, which WYG estimate to have a turnover potential of £91.6m at 2017 if developed. As shown in **Table 9.17**, after taking account of extant planning permissions, these commitments will negate any identified need for major new comparison goods development up to until 2028, based on the existing market share being retained.

Table 9.17: Quantitative Need for Additional Comparison Goods Floorspace in Bradford District – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	206.7	-206.7	-41,300	-68,900
2017	37.6	226.0	-188.4	-34,500	-57,400
2022	100.1	249.3	-149.2	-24,700	-41,200
2028	248.9	277.4	-28.5	-4,300	-7,100

Table 26 (Table 1b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

9.42 The results show that given the extent of extant planning permission across the district, if all are implemented this would extinguish all of the residual capacity identified up to 2028 based on the current market share being retained. WYG would recommend that BMDC seek to focus on delivery of these extant permissions to ensure that the future shopping needs of the district's community are met. The Council's first priority is to retain its focus of resources on the implementation of the Westfield Broadway Centre redevelopment with their development partners. As set out in Section 7, the retention of comparison goods expenditure has declined from 63.7% to 59.5% (by -4.2%) since 2008. This has not been helped by the delay in the Westfield Broadway Centre scheme but is mainly due to the improved claims on shopping patterns from facilities located outside the district, including facilities at Birstall Shopping Centre, White Rose Shopping Centre, Owlcotes near Pudsey, and improvements in Guiseley (the latter two facilities are located in Zones 4 and 18 of the Study Area). The assessment will now consider the estimated capacity for each of main town centres within the district. The increased leakage demonstrates that if appropriate retail accommodation can be realised that is attractive to retail operators then shopping patterns can be changed.

Bradford City Centre (including adjoining Forster Square and Retail Parks)

9.43 Our analysis indicates that the comparison goods facilities in and around Bradford city centre (including facilities at Forster Square and retail parks (including Tesco at Valley Road and Valley Road Retail Park), retain £434.8m of comparison goods expenditure (excluding inflow), equating to 28.8% of all available expenditure generated within the Study Area. WYG note that this represents a -0.9 percentage point decline from 29.7% in 2008. WYG found that there is inflow of 4.5% from outside the Study Area, which represents a 1.7 percentage point decline from the 6.2% inflow found in 2008. Whilst the Study confirms that Bradford city centre remains the principal comparison goods destination



in the district, it shows that there has been a clear decline in the centre's popularity as a comparison goods destination both inside the outside the district.

9.44 Assuming this market share is maintained and 'rolled forward' through future years, and given increases in forecast comparison goods expenditure and projected increases in the Study Area population, we estimate that at 2017 an additional £18.5m will be spent on comparison goods (both bulky and non-bulky). After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £49.2m is available at 2022 to support additional floorspace. This identified surplus is forecast to increase sharply to £122.4m by 2028.

Table 9.18: Estimated Capacity for Comparison Goods Facilities in Bradford City Centre

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	454.3	454.3	0.0
2017	496.7	515.2	18.5
2022	547.9	597.1	49.2
2028	609.7	732.2	122.4

Table 30 (Table 3) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share within the Study Area (28.8%) (assumes constant inflow at 4.5%)

At 2011 prices

9.45 There has been very limited new comparison goods retailing implemented since 2008 in the city centre which has meant that its performance has stalled. As set out earlier, WYG understand that there is 19,300 sq.m (net) of comparison good floorspace proposed in and around the city centre (through extant planning permissions). The majority (87%) of this is earmarked through the Westfield Broadway Centre city centre redevelopment (LPA Ref: 11/03446/MAO), which will deliver a net increase of 16,700 sq.m of new comparison goods floorspace once implemented. WYG estimate that all the proposed floorspace will have a total estimated turnover of £106.2m if all is trading at 2017. As shown in **Table 9.19**, extant planning permissions could fully absorb all of the identified quantitative need for further comparison goods development up to 2028, based on the continuation of the current market share.



Table 9.19: Quantitative Need for Additional Comparison Goods Floorspace in Bradford City Centre – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	97.1	-97.1	-19,400	-32,400
2017	18.5	106.2	-87.7	-16,000	-26,700
2022	49.2	117.1	-67.9	-11,300	-18,800
2028	122.4	130.3	-7.9	-1,200	-2,000

Table 26 (Table 3b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

9.46 The implementation of the Westfield Broadway Centre in the next two to three years is likely to result in an increase in the market share secured by Bradford city centre as the redevelopment encourages more shoppers to visit the city centre from the Study Area (and sub region) through its improved retail and leisure offer. WYG estimate that the introduction of the Westfield Broadway Centre will facilitate an increase in the market share from 28.8% to around 35% with inflow increasing from 4.5% to around 5%. Assuming an increased market share is at 2017 and beyond, and after increases in forecast comparison goods expenditure and projected increases in the Study Area population, we estimate that at 2017 an additional £126.3m will be spent on comparison goods. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £174.3m is available at 2022 to support additional floorspace. This identified surplus is forecast to increase to £276.1m by 2028. **Table 9.19a** shows that this increased market share will increase the level of surplus expenditure that would be available for new retail development.

Table 9.19a: Enhanced Capacity for Comparison Goods Facilities in Bradford City Centre

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	456.5	456.5	0.0
2017	499.1	625.4	126.3
2022	550.5	724.8	174.3
2028	612.7	888.8	276.1

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share within the Study Area (35%) (assumes constant inflow at 5%)

At 2011 prices

9.47 With the increased capacity derived from the enhanced market share which would likely result from the implementation of the Westfield Broadway Centre, WYG estimate that extant planning permissions



could absorb all of the identified quantitative need for further comparison goods development in the short term, but would allow for additional capacity after 2017, albeit limited at between 3,700 sq.m and 6,200 sq.m (net). This would increase to between 9,500 sq.m and 15,800 sq.m (net) at 2022. However, subject to the delivery of the Westfield Broadway Centre, these estimates should be used with a degree of caution as these will ultimately depend on the success of the development in encouraging shoppers back to Bradford and should therefore be reviewed in the future, once the Westfield Broadway Centre's trading patterns have stabilised after implementation. The results show that the Westfield Broadway Centre scheme absorbs either all or most of the immediate and short term capacity (based on existing and enhanced market share up to 2017), and therefore the priority must be to deliver this flagship project to ensure the future vitality and viability of the city centre is maintained.

Table 9.19b: Enhanced Quantitative Need for Additional Comparison Goods Floorspace in Bradford City Centre – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	97.1	-97.1	-19,400	-32,400
2017	126.3	106.2	20.2	3,700	6,200
2022	174.3	117.1	57.2	9,500	15,800
2028	276.1	130.3	145.8	21,700	36,200

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012) At 2011 prices

Keighley

9.48 Existing comparison goods retailers in Keighley retain the second highest level of comparison goods expenditure at around £201.5m, equating to 13.4% of all such expenditure generated within the Study Area. The results show that with inflow (at 1.9%) this increases to £205.3m at 2012. Assuming this market share is maintained and 'rolled forward' through future years, increases in forecast comparison goods expenditure and projected increases in population will result in a additional £8.4m originating from the Study Area to be spent on comparison goods at 2017. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £22.2m is available at 2022 to support additional floorspace, rising to £55.3m at 2028.

**Table 9.20: Estimated Capacity for Comparison Goods Facilities in Keighley**

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	205.3	205.3	0.0
2017	224.4	232.8	8.4
2022	247.5	269.8	22.2
2028	275.5	330.8	55.3

Table 26 (Table 2) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)² Assumes constant market share within the Study Area (13.4%) and constant inflow of 1.9%

At 2011 prices

- 9.49 Since the BRLS (2008) there has been a decrease in the level of comparison floorspace (2,180 sq.m) in Keighley, coupled with 1,800 sq.m of new comparison floorspace being delivered in edge or out-of-centre locations (including the comparison goods floorspace in the Asda store). As set out in Section 7, the market share for Keighley has declined since 2008 in both the wider Study Area, but also in its immediate catchment (Zone 5).
- 9.50 WYG understand that there is an additional 15,100 sq.m (net) of comparison goods floorspace committed through extant planning permissions in and around the town centre. The majority (80%) of this is proposed in centre, through the recently approved Worth Valley Shopping Centre on East Parade/Greseley Road (LPA Ref: 11/05268/MAF) which will deliver a net increase of 10,700 sq.m of new comparison goods floorspace. There is also a proposal to redevelop the former Focus DIY store at Cavendish Street (LPA Ref: 10/05373/FUL) for 1,400 sq.m. WYG estimate that all the extant commitments would have a total estimated turnover of £76.2m if all are trading at 2017. As shown in **Table 9.21**, the extant planning permissions would together absorb all of the identified quantitative need for further comparison goods development up to 2028 and beyond, based on the existing market share being retained. WYG advise that the Worth Valley Shopping Centre will deliver the proposed town centre expansion allocation in the RUDP and will help address the qualitative issues facing Keighley. The scheme will also increase the retention of locally generated expenditure from being spent at facilities further afield (Leeds and Bradford). The proposed developments, if implemented, could help increase the current market share (13.4%) to between 15% and 18% at 2017 once fully trading.

Table 9.21: Quantitative Need for Additional Comparison Goods Floorspace in Keighley – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual (Taken from 9.20)	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	70.2	-70.2	-14,000	-23,400
2017	8.4	76.7	-68.4	-12,500	-20,800
2022	22.2	84.6	-62.4	-10,300	-17,200
2028	55.3	94.2	-38.9	-5,800	-9,700

Table 26 (Table 2b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2011)
At 2011 prices

Ilkley

- 9.51 Existing comparison goods retailers in and around Ilkley retain 2.3% of the available comparison goods expenditure generated from within the Study Area, with a total spend of £34.7m at 2012. WYG found from the In Street Survey results that Ilkley did not benefit from any inflow from outside the Study Area for comparison goods shopping trips (although the survey identified visitors from outside the Study Area did visit Ilkley to undertake service and tourism trips). Assuming that Ilkley's market share is maintained and 'rolled forward' in the future, increases in forecast comparison goods expenditure and projected increases in population will result in a forecast additional £1.4m originating from the Study Area to be spent on comparison goods in the town at 2017. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £3.8m is available at 2022 to support additional floorspace, rising to £9.3m by 2028.

Table 9.22: Estimated Capacity for Comparison Goods Facilities in Ilkley

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	34.7	34.7	0.0
2017	37.9	39.3	1.4
2022	41.8	45.6	3.8
2028	46.5	55.9	9.3

Table 26 (Table 4) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10 (Sept 2012)

² Assumes constant market share within the Study Area (2.3%) with no inflow

At 2011 prices



9.52 As set out in earlier in the convenience goods section, Tesco secured planning permission for a replacement store at the former Spooner site at Railway Road. The new larger store will provide a large floor area to comparison goods, with a net increase of 2,136 sq.m (net). WYG estimate that all the proposed (extant) floorspace will have a total estimated benchmark turnover of £19.4m once trading at 2017. As shown in **Table 9.23**, after this extant planning permission is fully built it will absorb all of the identified quantitative need for further comparison goods development up to 2028 and beyond, based on the existing market share being retained. WYG advise that the replacement store is likely to help improve Ilkley’s current market share once implemented and should be monitored as well any impact on the rest of the town centre.

Table 9.23: Quantitative Need for Additional Comparison Goods Floorspace in Ilkley – Extant Planning Consents

Year	Comparison Goods				
	£m		Floorspace Requirement (sq. m net)		
	Residual	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	17.8	-17.8	-3,600	-5,900
2017	1.4	19.4	-18.0	-3,300	-5,500
2022	3.8	21.4	-17.7	-2,900	-4,900
2028	9.3	23.8	-14.5	-2,200	-3,600

Table 26 (Table 4b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012) At 2011 prices

Shipley (Zone 16)

9.53 Existing comparison goods retailers in and around Shipley retain 3.5% of the available comparison goods expenditure generated from within the Study Area, making it the third most popular comparison goods destination within the Study Area, with a total spend of £52.5m at 2012. WYG found that Shipley did not benefit from any inflow from outside the Study Area. As with other centres it is assumed that this market share is maintained and ‘rolled forward’ in the future, and based on this, increases in forecast comparison goods expenditure and projected increases in population will result in an additional £2.1m originating from the Study Area to be spent on comparison goods in Shipley at 2017. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £5.7m is available at 2022 to support additional floorspace, rising to £14.2m at 2028.



Table 9.24: Estimated Capacity for Comparison Goods Facilities in Shipley

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	52.5	52.5	0.0
2017	57.4	59.6	2.1
2022	63.4	69.1	5.7
2028	70.5	84.7	14.2

Table 26 (Table 5) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share within the Study Area (3.5%) and a no inflow At 2011 prices

9.54 Despite an overall reduction (-490 sq.m) in the level of comparison goods retailing in Shipley since the BRLS reported in 2008, WYG understand that there is an additional 1,000 sq.m (net) of comparison good floorspace proposed in and around the town centre (through three extant planning permissions). The majority of this is proposed in centre at the existing Asda store, where an existing consent (LPA Ref: 09/01848/FUL) provides for a mezzanine extension which includes 625 sq.m (net) of comparison floorspace. WYG estimate that all the proposed (extant) floorspace will have a total estimated turnover of £4.0m if all is trading at 2017 (assumes new Asda floorspace will trade at 50% of its national average benchmark level). **Table 9.25** shows that extant planning permissions would absorb all of the identified quantitative need for further comparison goods development up to 2017 with nominal capacity (up to 1,400 sq.m) in the longer term to 2028. Therefore subject to any future strategy, if BMDC seek to maintain the existing trading performance of the town centre they would need to ensure that existing planning permissions are delivered over the plan period as a minimum.

Table 9.25: Quantitative Need for Additional Comparison Goods Floorspace in Shipley – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	3.7	-3.7	-700	-1,200
2017	2.1	4.0	-1.9	-300	-600
2022	5.7	4.4	1.3	200	400
2028	14.2	4.9	9.3	1,400	2,300

Table 26 (Table 5b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

At 2011 prices



Bingley

- 9.55 Bingley has the smallest level of comparison goods provision of the five town centres within the district, this update found that existing comparison goods retailers in Bingley retain just 0.7% of the available comparison goods expenditure generated from within the Study Area (with a total spend of £10.8m at 2012). WYG found Bingley did not benefit from any inflow from outside the Study Area which reflects Bingley's limited comparison goods role and function. It is assumed that this market share is maintained and 'rolled forward' in the future, and on this basis, increases in forecast comparison goods expenditure and projected increases in population will result in an estimated additional £0.4m originating from the Study Area being spent on comparison goods in Bingley by 2017. After allowing for increases in the turnover efficiency of existing floorspace, a surplus of £1.2m is available at 2022 to support additional floorspace, rising to £2.9m at 2028.

Table 9.26: Estimated Capacity for Comparison Goods Facilities in Bingley

Year	Turnover - £m ¹	Available Expenditure - £m ²	Surplus Expenditure - £m
2012	10.8	10.8	0.0
2017	11.8	12.2	0.4
2022	13.0	14.2	1.2
2028	14.5	17.4	2.9

Table 26 (Table 6) of Appendix 7

¹ Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)

² Assumes constant market share within the Study Area (0.6%) and no inflow

At 2011 prices

- 9.56 As set out earlier, Bingley town centre has been subject to the redevelopment of the Myrtle Walk Shopping Centre as the 5Rise Shopping Centre since the publication of the BRLS (2008). This has resulted in the moderate (+0.1%) increase in the market share now claimed in the Study Area when compared to the 2008 trading position.

Table 9.27: Quantitative Need for Additional Comparison Goods Floorspace in Bingley – Extant Planning Consents

Year	Comparison Goods				
	£m			Floorspace Requirement (sq. m net)	
	Residual	Extant	Residual	Min ^{1*}	Max ^{2*}
2012	0.0	4.9	-4.9	-1,000	-1,600
2017	0.4	5.3	-4.9	-900	-1,500
2022	1.2	5.9	-4.7	-800	-1,300
2028	2.9	6.6	-3.7	-500	-900

Table 26 (Table 6b) of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2012

² Average sales density assumed to be £3,000 per sq.m at 2012

Allows for increased turnover efficiency as set out in Table 4a Experian Retail Planner 10.1 (Sept 2012)
At 2011 prices

9.57 As set out in earlier in the convenience goods section, Sainsbury's has secured planning permission for a new foodstore on the former Bradford and Bingley office site on Main Street. The new foodstore proposes a comparison goods floor area of 743 sq.m (in addition there is an extant permission to 'transfer' 136 sq.m of comparison goods floorspace to a cafe). WYG estimate that all the proposed extant floorspace would have a total estimated turnover of £5.3m if trading at 2017. As shown in **Table 9.27** above, extant planning permissions would together meet all the identifiable need for further comparison goods development up to 2028 and beyond, based on the existing market share being retained. WYG would advise that if the extant Sainsbury's store is built and trades at expected benchmark levels this could increase the existing turnover of the town centre by around 50% in the short to medium term and therefore, subject to its success, it may lead to significant increase in Bingley's current market share. WYG would recommend any improvements to shopping patterns derived from these development should be monitored after implementation to review the impact on town centre vitality and viability once settled trading patterns occur.

Qualitative Need

9.58 The above analysis provides an assessment of quantitative capacity based, for the most part, on the current market share achieved by existing facilities in a particular centre being maintained. However, it is evident that certain centres would significantly benefit from improved provision and, in doing so, would attract significantly greater number of shoppers, thereby increasing market share. Through improvements in the retail offer, the long-term viability of centres can be safeguarded and the need to travel further afield can be reduced.



- 9.59 In particular, it is evident from the above analysis, and through our observations in the field, that **Bradford city centre** currently has a relatively weak convenience goods offer for a city of its size and catchment, with only the Morrisons store anchoring the north quarter of the city centre, together with the existing markets. The new Household Survey reaffirms the previous findings of 2008 that the Morrisons store is still overtrading, as are existing convenience foodstore provision located in surrounding district centres (Girlington, Mayo Avenue and Great Horton district centres) to the south and west of the city centre in Zones 13 and 14, as well as the large Asda at Rooley Lane. However, the results reaffirm that the out-of-centre Tesco at Valley Road continues to significantly under-perform against its expected benchmark, despite improving its trading position since 2008 following physical improvements to the store. WYG believe that this under-performance is driven by the restricted nature of the current store configuration which limits Tesco's ability to create a sufficiently attractive shopping environment for its customers. Therefore, our previous advice from 2008 remains whereby we can confirm that there is a qualitative need to improve convenience goods retailing in and around Bradford city centre. Even after taking into account the under trading of the Tesco at Valley Road, the overtrading at large foodstores in the three surrounding district centres, the city centre (Aldi and Morrisons) and the Asda at Rooley Lane, means that facilities are cumulatively overtrading by £40.9m at 2012.
- 9.60 With this in mind, in the two main zones around the city centre including Zones 13 and 14, WYG finds that facilities in the two zones claim 90.8% and 91.2% of main food expenditure respectively, and 83.3% and 82.4% of top-up food expenditure respectively. The existing food provision's clearly satisfying local main food (and top-up food) shopping needs. However, of this, the city centre claims only 7.1% of main food trips from Zone 13 and 12.6% from Zone 14. In terms of top-up food market share this is limited to 8.3% claimed from Zone 13 and 10.3% from Zone 14. The results confirm that the vast majority of trade in the two zones is spent either at a nearby district centre or the Asda at Rooley Lane (located on the boundary of Zones 12 and 13). The survey finds that 76.6% of main food trips in Zone 13 are undertaken at the main foodstore at a district centre or the Asda store, and that 64% of main food trips in Zone 14 are undertaken at the same facilities. Analysis of the trade patterns indicates that 50% of the trade of the main foodstores at Girlington, Mayo Avenue and Great Horton and the Asda at Rooley Lane are drawn from Zones 13 and 14, and these stores have a wider catchment spanning into Zones 7, 8, 10 and 12. The results illustrate that the majority of expenditure is actually spent at the network of district centres and out-of-centre facilities before the city centre. The introduction of a new supermarket in the city centre would increase the number of potential shoppers visiting the city centre and would reduce the need to visit other stores in satellite district centres and in out-of-centre locations. Depending on the location of any new provision in the city



centre it would increase main food shopping activity within the city centre and could the increased potential for linked trips with other activities in the city centre. This is especially pertinent given the findings in Section 7, which reported that the market shares for both main food and top shopping trips to out-of-centre facilities have increased since 2008. However, it would appear that potential redevelopment opportunities within Bradford city centre are somewhat limited to those identified in the BRLS (2008), with the only available site able to accommodate a large format supermarket being located immediately adjacent the Westfield Broadway Centre redevelopment at the Royal Mail Sorting Office Site but also potential in the northern parts of the city centre around the Oastler Quarter and Manor Row. Whilst potentially available, this Royal Mail sorting office site is unlikely to be considered suitable by most main food operators as the site is not very visually prominent from the main arterial highway network.

- 9.61 The overtrading experienced at the main stores in the surrounding district centres reinforces our view that a new major food provision could be focused towards the city centre, first to address the lack of main food provision in the city centre, as well as to provide a key anchor for the centre. It would also address the overtrading that is occurring at the existing Morrisons store. WYG believe that securing a major supermarket in or adjacent to the city centre will encourage increased footfall and activity through linked trips to the rest of the city centre and reverse the concentration of activity that has occurred in the surrounding district centres over the past two to three decades. Given the current fragility of the comparison goods retail market, it will also help diversify the city centre retail offer and complement the Westfield Broadway Centre development, as well as make the city centre more resilient to the changing shopping environment.
- 9.62 Notwithstanding the above option, WYG note that the overtrading of current provision is within the central and southern Zones (10, 13 and 14) of the district, and therefore if a city centre site is not secured for a foodstore then an alternative location would need to be found in a sustainable location to the south of the city centre in or on the edge of an existing district or local centre. An alternative solution could be to consider two medium sized stores; one in the city centre and the second in an appropriate sustainable location to the south of the city centre.
- 9.63 The new household survey work has confirmed that there remains a significant leakage of comparison goods expenditure to facilities outside the district and this leakage has actually increased since 2008. However, surprisingly this was not to facilities in Leeds city centre, but instead reflects the improvements which have been made to other town centres in the Study Area (namely Guiseley, Otley, Pudsey) and also White Rose Shopping centre and Birstall Shopping Centre outside the Study



Area. With only small scale improvements (+700 sq.m) to comparison goods floorspace in Bradford city centre since 2008, it is evident that such improvements would have helped reverse such shopping patterns. With the Westfield Broadway Centre scheme scheduled to commence work in mid 2013, there remains a significant qualitative need to improve the comparison goods provision within the city centre and BMDC should maintain its priority on delivery of this flagship development. Failure to do this will only serve to further reduce confidence in the city centre's retail performance.

- 9.64 WYG still consider 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.
- 9.65 In terms of **Keighley town centre**, WYG can confirm that the introduction of Asda addressed the qualitative need identified in the BRLS (2008) (i.e. the overtrading of the Morrisons store). However, from review of Asda's performance it is evident that the store has helped increase the main food market share of all facilities in Keighley from 13.2% to 15.5%. However, the overall increase is at the expense of the defined town centres main food market share, which has declined from 13.2% in 2008 to 11.1%. This decline is also apparent in the defined town centre's top up food market share which reduced from 7.8% in 2008 to 5.4% in 2012.
- 9.66 Keighley sits in Zone 5 of the Study Area and in 2008 the main food retention of all facilities in Keighley was 89.2%. However, the introduction of Asda has resulted in the market share for the whole zone increasing to 94.8%, representing a 5.6 percentage point increase. The results show that more sustainable shopping patterns have been delivered. The impact on top-up food market share is even more significant, whereby the claim on top up food was 70.8% in 2008 and is now 91.7% representing a 20.9 percentage point increase. The results show that there is now less scope to increase the retention of trade in Zone 5 and therefore any new provision in Keighley is more likely to be diverted from existing provision.

The introduction of the Asda store has improved overall consumer choice and competition in the town and has also helped retain more trade locally. The results indicate that the impact on the existing Morrisons and Sainsbury's have been nominal, whereby the Morrisons is still overtrading (by £20.8m) above expected benchmark, and the Sainsbury's is still trading around expected benchmark level. Such overtrading suggests that a qualitative need may still exist for new provision. With extant planning consents for new convenience goods floorspace within the Worth Valley Shopping Centre and



elsewhere that together would absorb around half of the identified capacity at 2017, WYG therefore recommend that these commitments should be prioritised in the short term.

- 9.67 In terms of Keighley's comparison goods role and function, the findings show that the market share of Keighley has declined since 2008 from 15.9% to 11.0% at 2012. This decline reflects the deterioration in Keighley's Venuescore ranking between 2007 and 2011, as well as the decline (2,690 sq.m gross) in comparison goods floorspace (representing a loss of some 32 comparison goods units) identified in Appendix 1 between 2001 and 2012, which is coupled with a significant increase in vacancies.
- 9.68 WYG advise that improved and modern retail accommodation delivered through Worth Valley Shopping Centre will allow more national multiples to locate in Keighley and will help encourage more locally generated expenditure to be retained in Keighley, rather than being spent in facilities at Bradford, Leeds and White Rose. The introduction of quality space will realise the qualitative improvements needed for the town centre, as well as encourage more sustainable shopping patterns over the plan period. The priority should be to deliver the project over the next five years, which will help Keighley to sustain previously achieved market shares (16%).
- 9.69 As identified in the vitality and viability assessment, the introduction of M&S Simply Food and the Morrisons have been welcomed additions to **Ilkley town centre** and appear to have helped improve choice and competition in the town centre since 2008. In 2008, the BRLS (2008) found that Ilkley retained 51.9% of locally generated expenditure in Zone 3; however, the new results show that this has decreased to 47.9% at 2012 despite the introduction of these two additional retailers. However top-up food patterns have increased in Ilkley during the same period, whereby in 2008 the market share of such facilities in Zone 3 was 47.3% and has now increased to 61.1% in 2012. This is principally as a result of the Morrisons and M&S stores, demonstrating that the two stores are being used as basket top-up destinations rather than main food destinations. From review of the results, the main food decline has been principally caused by more residents in Zone 3 (probably in the western part of Zone 3) visiting the improved facilities in Keighley (mainly the Asda store) as well as improved market share at both the Sainsbury's and Morrisons stores.
- 9.70 The decline in main food shopping trips to facilities in Ilkley reinforces the need to implement the replacement Tesco store at Railway Street. Once implemented, it will claw back shoppers who are currently choosing to shop at Keighley. Since 2008, Ilkley has seen qualitative improvements to the retail provision in and around the town which has resulted in significant improvements in the retention of top up food expenditure. However, the decline in Ilkley's main food role and function can be



addressed through the qualitative improvement that will be delivered through the replacement Tesco store which will compete with new facilities in Keighley. In terms of comparison goods shopping, between 2008 and 2012 the results indicate that Ilkley's market share in its immediate area (Zone 3) has declined from 28.8% in 2008 to 24.2% in 2012 which represents a 16% decline in market (or 4.6 percentage points) share. The decline appears to be a result of the improved market share claimed by facilities in Keighley town centre and its retail parks, which previously claimed just 21% of trade from Zone 3 and now claim 27.4%. With declining market penetration and with proposed retail improvements earmarked in Keighley, Ilkley's future position will need to be considered carefully. However, given the unique historical nature of the town it will be difficult to improve its retail offer through physical regeneration and therefore other soft management measures (improved town centre management (Town Teams), setting up of Business Improvement District, business rate relief, community use of empty shops, increased promotion, market days, etc) will need to be considered to improve its competitiveness and retail offer.

- 9.71 This update reaffirms that there remains a significant qualitative need to improve and enhance main food convenience retailing in and around **Shipley town centre**. This is largely driven by the overtrading of the Asda and Aldi stores. The new empirical evidence shows that the Asda store has increased its main food market share in Zone 16 from 47.5% in 2008 to 48.0% in 2012. However, during the same period Aldi have increased their main food market share from nil in 2008 to 9.2% in 2012. The results also show that both stores have also increased their top-up food market share during the same period. Facilities in Shipley retain 57.1% of available main food expenditure in its immediate Zone (16) and 59.4% of the available top-up food expenditure. There may be some scope to retain more of the available local expenditure, as 22.5% of local residents in Zone 16 are travelling to facilities in Five Lane Ends and Greengates district centres (Zone 18), with 7.1% of Zone 16 residents travelling to facilities in Mayo Avenue and Great Horton district centres located in Zone 13, and a further 6.1% travelling to the Tesco at Valley Road and facilities in Girdlington and Bradford city centre (all located in Zone 14 to the south). There is a clear qualitative need to improve the convenience goods provision in Shipley, which was previously identified in 2008. Although WYG recognise that the proposed new Asda at Cemetery Road in Lidget Green will address some of the Asda, Shipley stores' overtrading by stemming some of the expenditure derived from Zone 14. Any new provision will improve local competition and choice to local consumers and address the over dominance of the Asda and Aldi stores, but will also to help discourage local residents to travel to facilities in the south of the district.



- 9.72 In terms of Shipley's comparison goods role and function, there is a qualitative need to improve local provision. As identified in the vitality and viability assessment there has been a steady decline of comparison goods floorspace to retail and leisure services since 2008 which whilst diversifying the town centre role it has reduced (albeit marginally) its non-food shopping function. Notwithstanding this decline in physical floorspace, the results of the household survey indicate that Shipley's market share in its immediate catchment (Zone 16) has increased from 23% in 2008 to 29.1% at 2012. With Shipley located within close proximity to Bradford city centre to the south it will always be influenced by this regional shopping centre and therefore it will be difficult to secure major new comparison goods retailing. Therefore, any strategy should seek to deal with reconfiguring and recycling existing smaller space, and encouraging new retailers to the town through amalgamating space to provide larger accommodation better suited to the needs of modern operators.
- 9.73 Bingley town centre has benefited from the 5Rise Shopping Centre development which has physically transformed the centre with improved shopping facilities and has provided a substantial qualitative improvement. Although there are still a number of prominent vacancies present in the town centre it has improved the availability of modern commercial accommodation in the town. The introduction of a new Co-operative Food in 5Rise has helped increase marginally the main food market share from 9.8% in 2008 to 10.2% in 2012, and has helped Bingley town centre increase its claim on top up food retention, which has increased from 30.5% in 2008 to 33.8% by 2012. The proposed Sainsbury's store will address any further qualitative need previously identified and will help reduce the propensity of local residents in Zone 6 to visit main food facilities in Keighley, which has increased since the opening of Asda in Keighley in 2009. The proposed Sainsbury's store will improve local competition and choice in Bingley but will also help create more sustainable shopping patterns within Zone 6 and reduce the need to travel to Keighley. In terms of comparison goods retailing, like Shipley and Ilkley, Bingley will need to manage its diminishing role as a comparison goods destination in the future in the face of increased polarisation towards large sub regional and regional centre as well as advances in SFT (on-line) growth. This will ultimately result in a role focussed predominantly around convenience goods shopping and services for these more secondary centres in the future.



10.0 LEISURE CAPACITY UPDATE

- 10.01 The approach to the assessment of quantitative need in the leisure market is less well developed than that in the retail sector, due to a number of reasons, including the fragmentation of the market and the limited availability of information. However, for the purposes of this update, we will look at the key sectors where the latest information is available and update the capacity where possible, namely in relation to cinema, bingo and bowling sectors, as there is limited information available on health and fitness and evening economies.
- 10.02 The results of the household survey have been used to determine the participation rate and the market share achieved by the different categories of leisure activity. The relevant tables are set out in **Appendix 8**.

Cinema

- 10.03 As set out in the BRLS (2008), Bradford district benefited from 34 cinema screens at 2008, the majority of which were located at the Cineworld (16 screen) at Leisure Exchange in the city centre, Odeon (13 screens) at the Gallagher Retail Park, Keighley Picture House (two screens), and the National Media Museum (three screens). WYG understand that the number of screens has remained constant since 2008.
- 10.04 Drawing on research by Mintel (2011)³¹, WYG can confirm that since 2007 the number of admissions to UK cinemas has increased from 162.5m to 169.2m in 2010, peaking at 173.5m in 2009. Despite admissions falling in 2010, the market value of the cinema sector increased from £1.30bn at 2009 to £1.34bn at 2010. The increase in value was principally due to increased pricing and attendance of 3D films and increased sales of concessions. Despite increasing pressure on disposable income and increasing high unemployment of 18 to 24 year olds, Mintel estimate that cinema admissions are likely to increase to around £198.6m by 2015, a 17% increase on 2010 levels.
- 10.05 As set out in Table 2 of **Appendix 8**, WYG has updated the previous cinema capacity for Bradford based on the new population figures as set out in section 7 and the results of the household survey 2012.

³¹ The UK Cinema Market (Mintel) (May 2011)



When comparing the participation rate and market share derived from the household survey (2012) to the 2008 results³², the participation rate for visiting the cinema has increased from 44% to 53%. In terms of the district's market share for cinema visits, this has also increased since 2008, from 65% to 68%, an increase of 3 percentage points.

- 10.06 Based on a participation rate of 53% and the district's market share of 68%, derived from the responses to the household survey, WYG has found that at 2012 there is likely to be 676,345 cinema goers. WYG estimate that this will increase to 757,447 people by 2028. Based on latest cinema admissions information from Mintel (2011) and cinema capacity, WYG consider that the district can accommodate 15 cinema screens at 2012 increasing to 17 by 2028. This is based on an average of 2.7 admissions per customer (based on Mintel 2011 data), which is comparable to Dondora Research (2009) that found that admissions per customer was 2.61 in 2009.
- 10.07 As with the BRLS (2008), this is significantly below the current cinema provision and would tend to suggest that there is over provision of cinemas in the district. However, our analysis does not take into account any potential inflow from adjacent areas. Even if an allowance was made for a 20% inflow of cinema goers, this would only increase the capacity to 20 cinema screens at 2028.
- 10.08 WYG note that Stainsby Grange Estates have recently secured planning permission (LPA: 11/05268/MAF (3)) for an eight screen cinema as part of the Worth Valley Shopping Centre on the edge of Keighley town centre. This permission is likely to help increase local participation rates in the northern areas of the district.
- 10.09 Therefore, based on the current evidence and latest Mintel estimates, we do not consider that there is any need for BMDC to consider any positive policy approach to deliver new cinema provision in the district over the plan period as the current provision is adequately meeting local demand.

Bowling

- 10.10 Since the BRLS (2008), which identified that Bradford district benefited from 60 bowling lanes, WYG understand that AMF bowling facility in Keighley closed in December 2010. This has meant that the

³² The 2008 household survey results have been adjusted to exclude 'don't know and varies' responses in order that a direct comparison to the 2012 household survey results can be made.



number of bowling facilities has decreased to 40 lanes in two purpose built facilities at the Hollywood Bowl in Bradford city centre and at Go Bowl in Shipley.

- 10.11 Drawing on latest information from Mintel³³, the UK tenpin bowling sector has contracted in value by 33% between 2006 and 2011 in real terms. The market peaked in 2008 at the beginning of the recession. In the UK the number of tenpin bowling facilities has declined from 325 in 2004 to 321 in 2011. In 2006, the tenpin sector was worth £271m by 2010 this had decreased to £238m. Mintel estimate that the sector will be valued at just £226m in 2016. Despite the shift in the market the number of facilities has remained relatively stable. The diminishing market sector is probably the principal reason for the closure of the AMF facility in Keighley as operators opt to close marginal operations. Mintel predict that the tenpin bowling industry will experience further contraction in 2012 with positive growth estimated thereafter to 2016. The success of tenpin bowling will be driven by retention of visitor volumes through customer loyalty and discounted fees with claw back of revenue through increases in ancillary purchases associated to the main bowling experience.
- 10.12 WYG have updated the capacity estimates set out in the BRLS (2008), using the results of the household survey 2012. The household survey found that the participation rate for bowling is 26% and the district retains a market share of 72%. The participation rate and market share achieved by the district for bowling has remained constant since 2008.
- 10.13 In calculating whether there is any quantitative need for additional bowling facilities, we have again assumed that this market share will remain constant over the plan period. WYG estimate that the district could theoretically support 119 lanes at 2012 rising to 134 lanes by 2028. Given that there are now only 40 lanes at two facilities in the district, the residual capacity is 79 lanes at 2012 rising to 94 at 2028.
- 10.14 If we consider that modern tenpin facilities like the Hollywood Bowl in Bradford can accommodate between 25 and 30 lanes, then the district could support potentially up to three tenpin bowling facilities. However, going forward, the contraction of the tenpin market since 2006, may significantly reduce operator demand going forward. The tenpin market is very much reliant on synergy with other related leisure uses and therefore it is unlikely that standalone tenpin bowling facilities will be commercially viable in the short to medium term. Given the uncertainties within this market sector,

³³ Tenpin Bowling – UK (November 2011)



WYG would not recommend BMDC to positively plan to accommodate such provision in the short to medium term, but should respond to any business opportunities that may be presented.

Bingo

- 10.15 Since the BRLS (2008), which identified that Bradford district had five bingo facilities, WYG understand that the independent Oxford Bingo at Dudley Hill Road has ceased trading and therefore there are only four facilities in the district, namely Buckingham Bingo at Bradford Interchange, Mecca at Little Horton, the Gala bingo halls, Keighley and at Tong Street, Bradford.
- 10.16 Mintel³⁴ estimate that 6% of the population played bingo in a licensed facility in 2008. In 2004, the number of bingo admission was 79 million in the UK; this grew to a peak of 83 million in 2005 before reducing to 72 million in 2008. Mintel³⁵ now estimate that only 4% of adults aged 18+ play bingo at licensed clubs. The decline is attributable to a number of reasons, including the smoking ban in public venues, restrictions of gaming machines in clubs, and the rise of on-line versions of the game which have had a significant influence on falling admissions. There has also been a tax burden on operators. This has led to falling revenue and prize monies. The decline in admissions has led to a decline in the number of bingo facilities in the UK. Mintel estimate that admissions and revenue have declined by an estimated 26% between 2006 and 2009. Mintel also estimate that between 2007 and 2011 a total of 109 bingo clubs closed representing 20% of the total bingo stock, however, by 2011 the rate of closures slowed. Mintel note that there is a higher participation rate in the northern regions when compared to the south. The closure of the Oxford bingo club in Bradford represents a 20% decline in provision which is comparable to the national position found between 2007 and 2011.
- 10.17 Since 2008, the participation rate for bingo has decreased by two percentage points, from 8% in 2008 to 6% in 2012, which is in line with the national trend. The district's market share for bingo has also decreased since 2008, from 88% to 78%, a decrease of 10 percentage points.
- 10.18 A comparison of the 2008 and 2012 household survey results shows that the bingo market share attracted by the internet has increased by one percentage point from 2% in 2008 to 3% in 2012. It is surprising that this recorded usage is not greater, given the national trend towards increased use of on-line bingo sites.

³⁴ Mintel: Bingo (April 2009)

³⁵ Mintel Leisure Review (Bingo) – December 2011 (from Ipso Mori / Mintel)



10.19 Based on the 2012 household survey which identifies a participation rate of 6% and market share of 78%, WYG found that there is a residual capacity to support an additional two bingo facilities at 2012, rising to three facilities at 2028, assuming that the current market share will remain constant over the plan period. However, given that there are four existing bingo facilities in the district and due to the national trend of falling admissions in recent years, WYG would recommend that BMDC should seek to support the existing bingo facilities, rather than plan for new facilities in the district over the plan period. If a business led opportunity arises, then this should be considered on its own merits.

Health and Fitness and Evening Economies

10.20 WYG have assessed the qualitative need for additional health and fitness and evening economy facilities using the results of the household survey, which allows us to consider the participation rate and market share of such facilities.

10.21 The results of the household survey show that there is a 30% participation rate for health and fitness activities and a 28% participation rate for leisure centre activities. Bradford district's market share for these activities is 69%. In terms of health and fitness activities, there has been a 7 percentage point increase in participation since 2008 when participation was 23%. The participation rate for leisure centre activities has remained relatively stable since 2008, decreasing by just one percentage point from 29%.

10.22 The household survey found that the participation rate for visiting restaurants is 77%, with Bradford district attracting a market share of 62% for this activity. The participation rate has increased by 4 percentage points since 2008, when participation was 73%. In terms of visiting pubs and nightclubs and social clubs, the household survey recorded participation rates of 44%, 8% and 12% respectively. The participation rates for these three activities has decreased since 2008, by 8 percentage points, 4 percentage points and 5 percentage points respectively. The aggregated market share of Bradford district for such activities is 63%.

10.23 The participation rate for visiting the theatre, galleries and museums identified by the household survey is 48%. The participation rate for these activities has increased since 2008. In terms of theatres, the participation rate was recorded as being 47% at 2008, and in relation to galleries and museums the participation rate was 39% at 2008. The market share retained by Bradford district for such activities is 58%.



10.24 In terms of walking, cycling and other outdoor activities, the household survey found the participation rate for these activities to be 66%. This shows an increase (7 percentage points) in participation since 2008, when the rate was 59%. The market share retained by Bradford district for such activities is now 61%.

Aspirations for Additional Leisure Facilities

10.25 The household survey asked respondents "Which leisure facilities would you like to see more of in the Bradford area?". The majority of respondents (57%) stated that there were no leisure facilities which they would like to see more of in Bradford. This perhaps indicates that the majority of residents consider the current provision to be adequate. In terms of those that would like to see additional leisure facilities in the area, the most popular response was 'swimming pool' with 11% of respondents wanting more swimming pools in the area. In addition, 9% wanted more children's facilities and activities, 5% wanted more sports facilities (football pitches, tennis courts and so on) and 5% wanted more outdoor play areas and park facilities. In terms of the three leisure facilities which have been analysed in detail above (i.e. cinema, bowling and bingo), 3% of respondents wanted more cinemas in the area, 2% wanted more bowling alleys and less than 1% wanted more bingo halls.

10.26 In comparing these responses to the responses to the same question in the 2008 household survey³⁶, the proportion of respondents stating that there are no leisure facilities which they would like to see more of has decreased by 8% (from 65% in 2008), which may indicate that there is a greater demand from the population for additional leisure facilities than there was in 2008. In 2008, swimming pools were also the main facilities that respondents wanted to see more of. However, the proportion of respondents stating that they would like additional swimming pools has increased by 4%, from 7% in 2008 to 11% in 2012. In 2008, 4% wanted to see more children's facilities and activities, which has increased to 9% in 2012.

Conclusion

Based on the market share analysis drawn from the 2012 household survey and data on recent trends for commercial leisure facilities, WYG finds that the existing leisure facilities in the district are satisfactory and the principal focus should be on retaining these over the plan period. The results show that the leisure market (especially the bingo and bowling sectors) have been significantly

³⁶ The responses to the 2008 household have been adjusted to remove 'don't know and varies' responses in order that a direct comparison can be made to the 2012 household survey data



impacted both by the UK recession and by changing leisure trends since the publication of the BRLS (2008), which has led to closures of facilities. Therefore, the future priority for BMDC will be to provide sufficient support to the existing facilities, to ensure that they can survive these challenging and difficult times in the short term to ensure they have a viable long-term future. In terms of future development pressures, it is unlikely that any new commercial leisure opportunities will present themselves in the short to medium term and there is no reason to actively plan for such provision in the development plan. A sensible approach would be for the Council to take a pragmatic view on any opportunities that may arise, based on the location of such proposals, and the qualitative and economic benefits which may arise from development.



11.0 FUTURE RETAIL PLANNING POLICY RECOMMENDATIONS

Introduction

11.01 The NPPF requires LPAs as part of their Local Plan to set out a strategy for the management and growth of centres over the plan period. As part of their strategy, LPAs should, inter alia:

- Recognise town centres as the heart of their communities and pursue policies to support the viability and vitality;
- Define a network and hierarchy of centre this resilient to change to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on clear definition primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centre that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable site to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres;
- Allocate appropriate edge of centre sites for main town centre that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre site cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre; and
- Set policies for the consideration of proposal for main town centre uses which cannot be accommodated in or adjacent to town centres.

11.02 Each of the above requirements is considered below in relation to Bradford district and its principal town, district and local centres below, where relevant.



Hierarchy

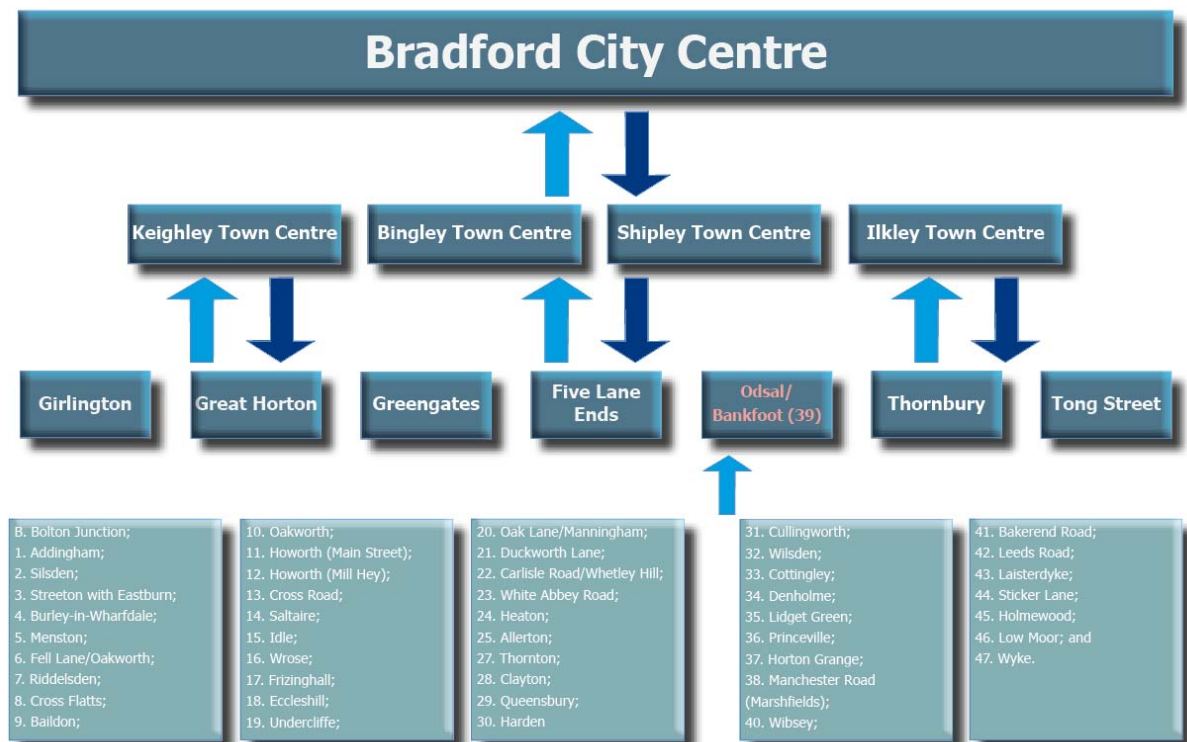
- 11.03 The current retail strategy for Bradford is set out by the 'saved' policies of the Bradford RUDP, which was adopted in October 2005, with relevant policies being 'saved' to remain part of the statutory development plan in September 2007 under the provisions of the Planning and Compulsory Purchase Act 2004. The RUDP designates the city centre, and the four town centres of Keighley, Ilkley, Bingley and Shipley, which are then supported by seven district centres and 40 local centres.
- 11.04 The Bradford Core Strategy Further Engagement draft report produced in October 2011 set out through Policy EC5 the overall retail hierarchy for Bradford district which can be summarised as follows:
- **Regional city:** Bradford city;
 - **Town centres:** Keighley, Ilkley, Bingley and Shipley;
 - **District centres:** Greengates, Girlington, Five Lane Ends; Tong Street, Great Horton and Odsal; and
 - **Local centres:** Addingham, Silsden, Steeton with Eastburn, Burnley-in-Wharfdale, Menston, Fell Lane/Oakworth Road, Riddlesden, Crossflatts, Baildon, Oakworth, Howorth (Main Street), Haworth (Mill Hey), Cross Road (Keighley), Cross Road, Saltaire, Idle, Wrose, Frizinghall, Eccleshill, Oak Lane, Manningham, Duckworth Lane, Carlisle Road/Whetley Hill, White Abbey Road, Heaton, Allerton, Sandy Lane, Thornton, Clayton, Queensbury, Harden, Cullingworth, Wilsden, Cottingley, Denholme, Lidget Green, Princeville, Horton Grange, Marshfields (Manchester Road), Wibsey, Barkerend Road, Leeds Road, Laisterdyke, Sticker Lane, Holme Wood, Low Moor and Wyke.
- 11.05 The new research undertaken during the course of this Study reaffirms that Bradford is an extremely important retail centre which caters for the majority of the Study Area population's comparison goods needs, as well as cultural and leisure needs. Accordingly, it is considered that future retail policy must emphasise Bradford's role as a regional city, which should be a focus for significant additional main town centre uses.
- 11.06 WYG considers the hierarchy proposed by the Bradford Core Strategy Further Engagement document to be generally appropriate and considers that the wording of Policy EC5 makes appropriate provision to direct significant main town centre provision to Bradford city centre as well as the four town centres.



- 11.07 The draft Core Strategy sought the removal of Mayo Avenue as a district centre and WYG continue to propose the removal of the designation of Mayo Avenue as a district centre as it has very limited facilities beyond the current standalone Morrisons and Matalan stores. WYG recognise that despite the facilities/services the current Morrisons provides, it remains a free-standing supermarket, not a collection of shops and services which would normally be expected at a district centre. Mayo Avenue simply does not function as a district centre but more of an out-of-centre retail destination and therefore should be de-classified.
- 11.08 However, the draft Core Strategy has allocated a new district centre at Odsal, in recognition of the redevelopment potential for a new supermarket and a range of non-retail service such as banks, building societies and other main town centre uses, including a medical centre and bus station. WYG believe that it not necessary to allocate a new district centre, but a more appropriate approach would be to elevate Bankfoot (Rooley Lane) local centre to a new district centre (it can be renamed Odsal district centre if required) as this will draw on existing infrastructure that can be sustained and strengthened in a sustainable location whilst also deliver wider regeneration objectives. The re is the potential for the Richard Dunn site to be allocated as part of a new enhanced district centre, rather than having to allocate a new centre. WYG note that the northern extent of the Richard Dunn site is just 100 metres from the southern parts of Bankfoot (Rooley Lane) and the site is considered a strong edge of centre site, and subject to any potential future development proposal it could make a logical extension to the Bankfoot (Rooley Lane) centre. As set out in Section 9, a qualitative and quantitative need exists to address the current overtrading experienced in the south of the district and therefore with the city centre this area could accommodate such future convenience, comparison and other main town centre uses, however, this will need to be balanced with the wider regeneration objectives of the city centre.
- 11.09 In terms of the network of local centres across the district, WYG believe that the 47 local centres are adequate to meet the future needs of the local population, with the exception of the elevation of Bankfoot to a district centre (Rooley Lane). WYG also advise that Sandy Lane does not function as a local centre but more like a local parade and therefore should not be considered a local centre.
- 11.10 WYG has also reviewed other previously allocated local centres. As with the similarities with Mayo Avenue, WYG recommend that Buttershaw does not function as a local centre but a standalone supermarket and therefore should be excluded as a designated centre. We previously advised (BRLS, 2008) that Bolton Junction, Eldwick and Shearbridge/Listerhills should be de-allocated as local centres. We have again reviewed their functionality, and with the exception of Bolton Junction, WYG

recommend that these centres should be considered as local parades rather than local centres. However, Bolton Junction should be included in the network of local centres, and therefore the district can be covered by 46 local centres. **Figure 11.1** below illustrate the recommended retail hierarchy for Bradford district and should be taken forward in the emerging Local Plan.

Figure 11.1: Suggested Retail Hierarchy



Primary Shopping Area

11.11 As indicated at paragraph 11.01 above, it is necessary for LPA's to identify the primary shopping area of existing centres as this forms the basis in terms of the application of the sequential approach to development. In this respect, Annex 2 of the NPPF provides the following definitions for the primary shopping area (PSA), the primary frontage and the secondary frontage.

- Primary Shopping Area

'Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage)'.



- Primary Frontage

‘Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses’.

- 11.12 Policy EC5 of the Further Engagement draft of the Core Strategy did not define the extent of the Bradford or other centres’ PSA, as this will be determined with future Allocations DPD, the Bradford city centre Area Action Plan DPD and other DPDs.
- 11.13 WYG has retained the city centre boundary for Bradford derived from the Bradford City Centre Area Action Plan as well as consideration of the Shipley and Canal Road Area Action Plan Boundary to the north of the city centre. The proposed PSA has sought to assist in directing future retail development/investment. It still covers the main existing retail activity area but has been extended to cover the Westfield Broadway Centre site to positively encourage its implementation in the short term to encourage new retail investment in the city centre. The extent of the city centre and PSA is set out in Appendix 9. Subject to the implementation and success of the Westfield Broadway Centre, we have allocated a potential extension to the primary shopping area covering the ‘Royal Mail Sorting Office’, such an expansion area (or Phase 2) would help build on the Westfield scheme as a second phase to the city centre’s retail expansion and this area could accommodate further retail (both convenience and comparison) or a mix of uses to reinforce the city centre function. To ensure this area can function as a logical extension to the city centre then pedestrian linkage to Cheapside and the Westfield site will need to be strengthened to ensure the site does not sit in isolation to the rest of the city centre and pedestrian movement is encouraged between the two areas to ensure synergy. The Phase 2 area should only be promoted once Westfield has been implemented and once well established trading patterns are secured.
- 11.14 We have also provided our recommendations as to the appropriate extent of the town centre boundaries and PSA for Bingley, Ilkley, Keighley and Shipley on plans provided in Appendix 9. In terms of Bingley, the PSA includes the two sites that are subject to new retail development (Sainsbury and Aldi) to encourage economic development, building on the 5Rise Shopping Centre investment and to further reinforce and strengthen the centre. The town centre boundary and PSA for Ilkley has remained consistent with the advice in the BRLS (2008) as little has changed, however, once the new Tesco store is implemented at Railway Road, and the current store at Springs Lane is closed and redeveloped for other non main town centre uses, the Council may want to adjust the town centre boundary to exclude the Springs Lane store.



- 11.15 With Keighley town centre we have reviewed the town centre boundary and made some adjustment to the extent of the boundary in the western area to include the western approach along Damside Road. In terms of the PSA we recommend that it be extended to include the land to the east of Keighley market and the land that is earmarked for the Worth Valley Shopping Centre.
- 11.16 In terms of Shipley town centre, we recommend that in order to deliver the quantitative and qualitative need for a new foodstore as identified in section 9, and to help address the overtrading occurred at the current Asda store, then any new foodstore needs to facilitate a well designed and well connected link to the rest of the town centre. The Council need to consider the site which will better encourage the propensity of shoppers to undertake linked trips to Shipley town centre, to ensure it can sustain its current vitality and viability but also will facilitate a stronger active frontage with the rest of the town centre which will encourage
- 11.17 Although the NPPF identifies that primary and secondary shopping boundaries should be defined, WYG consider that, given the current economic position of the wider economy and the current high vacancies experienced in most of the existing town centres, such definitions can be too restrictive and can act to discourage new development investment, and changes of use. Traditionally, such tools have been used to guard against increasing retail, leisure and financial service provision. Although well intentioned, the application of such frontage policy can often be counter-productive in terms of fostering activity and growth through other land uses, which still often add to the vitality of a town centre. Therefore, WYG recommend that a defined PSA should be the principal tool to direct future retail development.
- 11.18 In terms of boundary changes to district and local centres, we recommend some relatively nominal changes which are set out in Appendix 3. These include changes to Thornbury district centre, and the following local centres; Crossflatts, Frizinghall, Clayton, Queensbury, Lidget Green, Marshfields, Bankfoot, Wibsey and Leeds Road. WYG has also proposed new local centre boundaries for the following new centres: Menston, Riddlesden, Oakworth, Heaton, Harden, Cullingworth, Wilsden, Cottingley and Low Moor.

Thresholds

- 11.19 In accordance with best practice, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment. WYG does not



consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 500 sq.m convenience store (which could be operated by Tesco Express or Sainsbury's Local) will likely have a greater impact on a small centre than a similar facility would on Bradford city centre or the other four town centres. Therefore, in developing the policy in the future, it is more appropriate to have a range of thresholds, depending upon which centre the development applies to.

- 11.20 Accordingly, policy could advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of the particular centre.
- 11.21 For a centre of the size of Bradford city centre, performing the role that it does, it is recommended that development proposals providing greater than 1,500 sq.m gross floorspace for town centre uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold for Keighley, Shipley, Bingley and Ilkley to development proposals greater than 1,000 sq.m gross, for district centre development proposals that are greater than 500 sq.m and for local centre development proposals that are greater than 200 sq.m gross. In our experience, it will only generally be development of a scale greater than these thresholds which will lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses.
- 11.22 The proposed thresholds at town, district and Local centre level are considered to reflect the relatively small size of some of the centres at the lower end of the retail hierarchy and their consequent potential susceptibility to alternative 'out-of-centre' provision. In WYG's experience a 200 sq.m operation located outside but in proximity to a defined local centre may well impact on its performance. However, in practice, it is envisaged that a proposal of just greater than 200 sq.m adjacent to a local centre would generally only require an Impact Assessment of very limited length (i.e. for development of such a scale, impact may be able to be dealt with as part of the covering letter accompanying the application).

Retail Strategy

- 11.23 In terms of convenience goods provision, this Study has identified an immediate requirement throughout the district (over and above existing commitments) for an additional 600 sq.m to 1,500 sq.m (dependent on format and operator) of convenience goods sales floorspace up to 2017 and assuming the current market share (77.3%) is maintained. The level of need identified is principally a



consequence of current stores' overtrading. The identified capacity is reduced by existing commitments including the Sainsbury's at Bingley, the Asda at Lidget Green, and the replacement Tesco at Ilkley, as well as stores with unspecified operators at Bankfoot and Sticker Lane local centres, and the current need appears to have been met in the short term.

11.24 However, over the plan period up to 2028, the need for additional convenience goods provision is forecast to grow further post-2017, with a requirement for between 7,700 sq.m (net) and 19,400 sq.m (net) (depending on operators) over the later part of the plan period (at 2028). WYG estimate that this need could support two further large food superstores or a greater number of smaller stores (after current commitments are accounted for). Given the poor performance of Bradford city centre as a main food shopping destination, WYG has identified that there is a qualitative need to improve this through positive policy intervention and a site to accommodate a major foodstore in or on the edge of the city centre should be prioritised. As set out in Section 9, this will encourage more main food shoppers to the city centre which will encourage improved customer footfall for existing comparison and service providers in the city centre, thus increasing the overall vitality and viability of the city centre. However, we do have some concerns that retail operators may have reservations about locating in or on the edge of the city centre due to congestion and access concerns and therefore a fall-back position may need to be considered. As set out in the BRLS (2008) suitable locations for new major convenience goods retailing are both the Royal Mail sorting office, around the northern parts of the city centre around the Oastler Centre Quarter and the land to the east of Manor Road. Such development in the northern areas of city centre would help provide a counter balance to the Broadway Shopping centre, to ensure sufficient retail activity is retained to maintain commercial interest and reduce any impact as a result of the shift in activity to the south of the city centre. As explored previously this may involve a comprehensive strategy to reconfigure or redevelopment the area for a new foodstore, indoor market and other main town centre uses.

11.25 The results found that a number of foodstores in the south of the district (Morrisons at Mayo Avenue, Tesco at Great Horton, the Asda at Wyke, the Tesco at Buttershaw, and the Asda at Rooley Lane) were overtrading significantly, and although accommodating a new foodstore in the city centre may address some of this overtrading, we believe that allocating a new foodstore at Bankfoot (Rooley Lane) district centre would more specifically address the overtrading experienced in the south of the district.

11.26 WYG note that the proposed Asda at Cemetery Road in Lidget Green will go some way to address the overtrading that is experienced at the Morrisons at Girlington as well as address some of overtrading



at the Asda in Shipley; it will improve consumer choice and competition in the western urban area of Bradford.

- 11.27 In terms of the other town centres, the proposed Sainsbury's and Aldi stores at Bingley will help enhance significantly the town's position as a convenience goods destination to that comparable with other defined town centres and these should be positively encouraged.
- 11.28 In terms of Keighley, the introduction of Asda in 2009 has created more sustainable shopping patterns by increasing the town's wider market share. This has been at the expense of facilities in Ilkley; however, the new replacement Tesco store in Ilkley will rebalance Ilkley's trade once opened. However, despite Keighley's improved performance, both the Asda and Morrisons store are still experiencing significant overtrading. Whilst this could be considered to represent a need for new floorspace, WYG believe that proposed new convenience goods floorspace within the Worth Valley Shopping Centre (as well as the new Tesco at Ilkley and Sainsbury's at Bingley) may help address this and should be monitored. At present, Keighley has a strong main food offer and we don't recommend that any major new development should be promoted in the short term. However, the Council should monitor the position going forward.
- 11.29 In terms of Ilkley, the proposed Tesco replacement store will meet the town's future requirements over the plan period and there is no need to plan for any new provision.
- 11.30 The results generally reaffirm the 2008 findings of the BRLS (2008), whereby there is significant capacity for new convenience goods provision in Shipley, derived from the overtrading of the Asda store, but also by the overtrading now experienced at the Aldi store at Tony Miller Approach. The key priority in the short term will be to secure and deliver a major supermarket in the town. Given the strength of the Asda and its relationship with the rest of the town centre, WYG recommend that any new supermarket will need to be well linked to the town centre to ensure that existing linked trips can be retained as much as possible. Any new foodstore location should seek to provide an opportunity for further commercial investment in adjacent the town centre.
- 11.31 The Study has reaffirmed that Bradford city centre as a comparison retailing destination is continuing to decline. This continued decline since 2001 has seen a contraction in the level of comparison goods floorspace and a high incidence of vacancies apparent across the city centre as well as reduction in the city centre's market share since 2008. The key contributor to decline was the recession and the limited growth in recent years that has influenced the delays in the implementation of the Westfield



Broadway Centre scheme. As found in Section 7, the city centre market share has declined from 29.3% in 2008 to 28.5% by 2012. The Study has found that substantial expenditure flows to Leeds and Halifax, with trade to retail parks such as Birstall Shopping Park (Junction 27), White Rose Shopping Centre still notable and increasing. However, the results show that the most influential impact on Bradford has been from market share improvements achieved by Guiseley and Owlcotes/Pudsey to the immediate east of the district. It is also evident that the market share of comparison expenditure claimed by city centre facilities within Bradford district is supported by the strong performance of Foster Square which has increased in popularity since 2008.

- 11.32 The introduction of the City Park has also been a great success in encouraging people back into the city centre. In our view, public sector investment in the City Park, public realm improvements and the improved bus terminals has not been replicated by significant private sector investment of a commensurate scale. Indeed, whilst there are a number of vacant units in the city centre of varying scale and format still in prevalent at present, the positivity in terms of the progress towards implementation of the Westfield Broadway Centre scheme and the launch of the Bradford City Centre Growth Zone will kick start the local economy with focused investment and resources channelled through the Regional Growth Fund initiative.
- 11.33 This update Study has found that with reduced comparison goods expenditure growth and with increased claims from SFT growth, the previously identified capacity in 2008 has now significantly been reduced. However, the growth that has been identified and any subsequent need for additional comparison goods floorspace can still be met by the Westfield Broadway Centre commitment. As demonstrated in Section 7, the introduction of the Westfield Broadway Centre is likely to stem any further decline and increase the current market share (28%) to a more sustainable level (circa 35%) and to a level previously achieved before 2008. Due to the importance of this single opportunity on the district's economy, the future strategy for Bradford city centre is to prioritise and focus both public and private sector resources towards implementation of this important flagship scheme through the Growth Zone initiative. The implementation of the Westfield Broadway Centre scheme will help reverse the declining market share through facilitation of an significantly improve and strengthen the retail offer that will help reduce the current expenditure leakage that is currently occurring to other facilities outside the district, increased shopping patronage will strengthen the vitality and viability in the long term.
- 11.34 In the short term, the Council need to carefully monitor progress with a start date for the Westfield Broadway Centre scheme scheduled to commence in the summer 2013, it is estimated that a with a 2



year build out programme for a project of this scale then it is likely to be trading before the Christmas 2015 period. The priority for the Council and its partners (Westfield and Meyer Bergman) will be the continued and co-ordinated promotion of Bradford Growth Zone, building on the success of the Mirror pool and other initiatives as well as encouraging new employment generation. The Council will need to maintain its pro-active approach to securing a successful and vital city centre with the Westfield Broadway Centre scheme being pivotal to the growth strategy. WYG reaffirm that the delivery of significant new comparison goods floorspace is considered to be essential to the future vitality and viability of the city centre.

- 11.35 The Growth Zone is a key initiative to encourage businesses to locate and invest in the City Centre, with improved super-fast broadband and Wi-Fi, improved employment and skills programmes through the Get Bradford Working Programme and the Business Growth Scheme provide important tools to create an environment to encourage investment.
- 11.36 In terms of the other main town centres, the town centres of Shipley, Ilkley and Bingley should seek to build on their existing infrastructure through incremental comparison goods improvements. With increasing polarisation of comparison goods shopping patterns to larger sub-regional and regional centres, smaller centres such as these will need to focus on strengthening their convenience and retail service function to help meet the day to day needs of their local community. In terms of Keighley, the key priority will be for the Council to support the implementation of the Worth Valley Shopping Centre in the short to long term and ensure that it successfully integrates with the rest of the town centre, which will help build on the well established Airedale Shopping Centre and convenience goods retailing in Keighley to safeguard its longer term future.
- 11.37 In addition to the physical retail requirements to be taken forward across the district over the plan period, WYG would also recommend that there are soft management measures which can assist in supporting a viable and vital network of town, district and local centres. In this regard, the Portas Review provided a number of recommendations (28) to help improve the future performance of our town centres. WYG recognise that some of the recommendations are already in place in Bradford, including a well established town centre management structure and markets team and the business rate rebate scheme for the city centre through the Business Growth Scheme. WYG would recommend that, given the clear challenges facing the vitality and viability of the district's centres, the continued and dedicated resources and capital should be still be focused into a coherent operational management team tasked with revitalising the district's town, district and local centres. This should be



progressed through a visionary and strategic approach that will allow entrepreneurship and enterprise to flourish thus providing the impetus and catalyst to secure additional activity and investment.

11.38 Whilst this report has considered the performance of district and local centres, as set out in Section 6, it will be imperative that over the plan period where new large scale residential growth areas are proposed, the Council through consideration of paragraph 38 of the NPPF should carefully consider the location of new local shops and facilities and other infrastructure that can support new communities, this can either be accommodated within the existing network of centres, or where practical and justifiable, opportunities could be integral to the economic and residential growth areas themselves to encourage sustainable communities which are accessible and within walking distance of supporting infrastructure. WYG would recommend that further analysis for the retail and leisure implications of any residential growth strategy are considered during the plan preparation process.



GLOSSARY OF TERMS

- Capacity -** 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.
- Study Area -** This represents the household survey area, which is based on postal sectors.
- Experian (MMG3) -** The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
- Comparison Goods -** Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Annex A, PPS4 Practice Guidance).
- Furniture Goods -** *Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, etc. – as defined by MapInfo – Explanatory Volume 2005 Expenditure*
- DIY Goods -** *Includes all consumer expenditure on hardware, DIY, decorators’ supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, etc.*
- Electrical Goods -** *All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, etc.*
- Clothing & Footwear –** *All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, etc.*



- Household Goods –** *Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, etc.*
- Recreational Goods –** *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, etc.*
- Chemist Goods -** *All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, etc.*
- Convenience Goods -** Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Annex A, PPS4 Practice Guidance).
- Expenditure per Capita -** This is the average spend of each person within the defined Study Area on a variety of retail goods.
- Expenditure -** 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.
- Expenditure Forecasts -** This assessment has been undertaken using the 'goods based' approach as prescribed in PPS4 Practice Guidance, the information on consumer retail expenditure forecasts have been derived from Experian (2011).
- Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by Experian Table 4a and 4b of Retail Planner Brief 10.1.
- Gross Floorspace -** This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).
- Net Floorspace -** This entails the level of internal area devoted to the sale of goods.



- Market Share -** 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.
- National Multiple -** This is a retail or service operator which is or part of a network of nine or more outlets.
- Price Base -** The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
- Rates of Productivity -** 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.).
- Sales Density -** 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.
- Special Forms of Trading -** Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
- Trade Draw -** This refers to the level of trade attracted to a particular facility/centre.
- Turnover -** The turnover figure relates to the annual turnover generated by existing facilities.
- Prime A Rents -** 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.



- Yield -** A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.
- GOAD Plans -** 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.
- GOAD Reports -** 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.
- Convenience (GOAD) -** 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,
- Comparison (GOAD) -** GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, children's 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 menswear and acc., ladies wear and accessories, leather and travel goods, menswear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, second-hand 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
- Retail Service -** 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 video rental, vehicle rental, vehicle Repairs and Services and video tape rental

Leisure Service -

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

Financial Service -

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.

FOCUS Report-

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.

town -

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.

district -

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.



Local -	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.
town centre	Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments comprising or including main town centre uses, do not constitute town centres. (Annex 2, NPPF)
Primary Shopping Area	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage) (Annex 2, NPPF).
Primary Frontage	Primary frontages are likely to include a high proportion of retail uses, which may include food, drinks, clothing and household goods. (Annex 2, NPPF).
Secondary Frontage	Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses. (Annex 2, NPPF).
Edge-of-centre	For retail purposes, a location that is well connected to and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of



the town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances. (Annex 2, NPPF).

Out-of-centre

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

Out-of-town

A location out of centre that is outside the existing urban area (Annex 2, NPPF).

