# 7C: TOWN CENTRE HEALTHCHECKS

**APPENDIX 7C : HEALTHCHECKS**

This section provides a healthcheck for each of the 30 town centres within Leeds which were visited in September and October 2010. The health of the town centres has been measured against the vitality and viability indicators set out in Annex D of the PPS4.

**Store and Floorspace Summary**

For each centre the diversity of main town centre uses are shown in a store summary table which identifies the number of uses within the centre and compares these to the district centre average for Leeds and the national average. Figures were derived from Experian Goad Centre Category Reports where available and from figures provided by Leeds City Council where Goad was not available.

The amount of floorspace for different functions is shown in a summary table with data sourced from Experian Goad Centre Category reports where available. Floorspace figures were not available for those centres without category reports.

**Retailer Representation and Services**

A summary of the anchor retailer and main operators in the centre and services available are given for each centre following visits to the centres.

**Environmental Quality**

Annex D of PPS4 identifies the environmental quality as a key indicator. An independent summary of the overall environment is provided for each centre following site visits.

**Pedestrian Activity**

PPS4 Annex D refers to pedestrian flows (footfall) being a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on streets in different parts of the centre at different times during the day.
A formal quantitative footfall survey was not conducted as part of this study although observations of the pedestrian activity were made and are reported in the health checks.

**Accessibility**

A summary of the general accessibility by pedestrians and vehicles visiting the centre is provided in the reports.

**Car Parking**

Car parking available in the centres noted within the health checks.

**Surrounding uses**

The land uses surrounding the centres are identified.

**Shopper Survey and Business Surveys**

In discussions with Leeds City Council, shopper and business surveys were carried out in ten of the 30 town centres. The centres surveyed were Armley, Pudsey, Morley, Otley, Garforth, Harehills, Holt Park, Horsforth, Dewsbury Road and Moortown.

100 shopper surveys were carried out in each centre between 3rd and 17th September 2010. A summary of the results is provided in the health check for the centre.

Leeds City Council instructed that 500 business surveys should be carried out across the ten centres during September 2010. The methodology for the surveys involved paper questionnaires being delivered to businesses with an instruction that these would be collected by a representative at a later date that would be able to help business owners or managers complete the questionnaire. Despite this methodology, the success rate of questionnaires was poor with less than 50% being completed. The size of centres, coupled with a success rate of less than 50% has resulted in low figures being achieved for some centres which leads to potentially unreliable/ inaccurate data.
The centre healthchecks provide summaries of the findings of the business surveys.

**Vacancy Levels and Average Rents**

Vacancy levels in the centres have been recorded in accordance with annex D of PPS4. Indeed the healthchecks provide two vacancy level figures which differ in a number of centres. The floorspace summary tables included in the healthcheck for each centre are derived from either Experian GOAD figures or from figures provided by Leeds City Council. The dates of the surveys are referenced in the table. These vacancy figures are considered to be accurate as they are derived from a survey of each shop unit at a point in time.

Despite these figures it was considered important for Colliers International to record their view of the vacancies within a centre following a single visit during the day. Many retail units now install security shutters and for those uses not open during the day, hot food takeaways for example; dead frontages are created within the centre. These dead frontages can be perceived to be vacant units as the effect on the vitality of the shopping street is similar. In addition the clustering of vacant units can also have a negative effect on a centre as it can be perceived that there are more vacant units than there actually are.

For the reasons above, in a number of instances the CI vacancy estimate is higher than the tabulated vacancy figure. This perception of a centre is considered to be important in considering the overall health of the centre.

National average vacancy levels are 10.4% with the District Centre Average in Leeds estimated at 8.2%. In the healthcheck, vacancy levels at approximately 10% are referred to as average, figures above 10% are considered to be high and low levels are referred to as 5% or below.

Colliers International provided information on average rents achieved in each of the town centres. It is noted that the figures are an average which mainly relate to multiple retailers in Zone A. The figures do not account for potential differences between the primary and secondary shopping areas.

**Centres Performance/ Agent Perceptions.**

Colliers International retail agents visited each of the town centres and their perceptions of the centre are summarised in a table in the Health checks. Commercial yields for the centre are given, an explanation of yields is provided in section 4 of the main report although broadly speaking low yields indicate that investors believe a town is attractive.
Example requirements from retailers have been listed where these exist. The retailer requirements for centres are derived from agents local knowledge and *propertydata.com* which compiles a report of retail requirements which is a source material for agents.

The table refers to the suitability of the centre for modern retailing, this is an assumption of the agent as to whether the centre contains the necessary and desirable retail floorspace, services and access that modern retailers seek.

Annex D of PPS4 refers to the potential capacity for growth or change of centres. Colliers International have provided a market view on whether the centre is considered to **expand or contract** in the future. The view of the centre to change is based on all of the factors listed above including, existing retailers within the centre, likelihood of the centre to attract new multiple retailers, type of units within the centre and yields and the potential for the centre to expand as a result of potential new land becoming available. For example, in most instances, if a centre has low yields and a number of multiple retailer requirements, it is likely to assume that the centre will remain stable or expand in the future. If the yields have risen and there are no specific requirements, coupled with old units then it is possible the centre will decline in the future. It is important to note that the agents market perception of a centre may not necessarily reflect the planning policy approach for the centre as the policy requirements for a centre within the hierarchy identified in PPS4 consider a wider range of factors.

The table also considers the **centres performance** overall as improving, stable or declining against the national trend, the national trend at the time being generally declining due to the economic recession.

Finally the table provides a general comment by retail agents on the **future of the centre**, whether it is in their opinion and based on the information, the right size, should expand or contract. As stated above it should be emphasised that the agents market perception may not necessarily reflect the planning policy approach for the centre.

**APPENDIX 7C : HEALTHCHECKS**

## Introduction

**Armley** town centre is located approximately 2.9 km (1.8 miles) west of Leeds City Centre in Zone 5, Inner West. The prime shopping street is Town Street.

## Store and Floorspace Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 14 | 10.6 | 8.9 | 7.61 |
| Comparison | 27 | 20.5 | 24.3 | 29.24 |
| Service | 60 | 45.5 | 50.6 | 47.1 |
| Vacant | 23 | 17.4 | 8.2 | 10.41 |
| Miscellaneous | 8 | 6 | 7.1 | 5.64 |
| **Total** | 132 | 100 | 100 | 100 |

| | Sq ft net | % | National Average % |
|---|---|---|---|
| Convenience | 24,400 | 12.05 | 11.48 |
| Comparison | 47,800 | 23.6 | 29.44 |
| Service | 89,900 | 44.4 | 43.6 |
| Vacant | 22,600 | 11.2 | 8.3 |
| Miscellaneous | 17,800 | 8.8 | 7.18 |
| **Total** | 202,500 | 100 | 100 |

Source: Experian Goad Centre Category Report 27/01/2010

## Retailer Representation and Services

This is a large and busy town centre with Somerfield acting as an anchor retailer on Town Street and Tesco operating from a unit off Stanningley Road. Other convenience offer within the centre comprises Bargain Booze and independent butchers, greengrocers and bakers. A range of comparison goods are provided by both national occupiers including Superdrug, Wilkinsons and a large number of local occupiers. There are a large number of services in the centre including a Post Office, banks, and betting shops, leisure centre and library.

## Environmental Quality

The centre comprises a purpose built shopping precinct on Town Street which has expanded to include other units to the east and west. There is also a small cluster of modern units on Stanningley Road/ Beech Avenue.

Stanningley Road and Town Street are busy arterial routes into Leeds and the environment in the centre is therefore noisy and congested at times. The centre is densely developed and lacks areas of public realm. However there have been recent improvements to the centre including new street furniture, lighting columns and some public art.

**Pedestrian Activity**

Pedestrian activity in the centre is high, although movement is restricted across Town Street due to the long safety barrier.

**Accessibility (Transport)**

The centre is developed around two main roads which provide good accessibility for a wide area. There are bus routes providing access to Leeds City Centre on both Town Street and Stanningley Road.

**Car Parking**

Car parking within the centre is good. Whilst there is very limited on-street car parking, off-street car parking is provided to the rear of the Somerfield store on Town Street, to the front of the Tesco Express store on Stanningley Road and at the Leisure Centre.

**Surrounding Uses**

The centre is surrounded by a mix of uses comprising residential and industrial uses and also areas of parkland including Armley Moor.

**Shopper Survey**

A survey of 100 shoppers was carried out in the centre in Summer 2010. The majority of respondents, 74% stated that the main reason for visiting centre was to shop for goods, other reasons were to pay bills, visit services and to browse.
The majority of shoppers, 70% bought convenience goods from the centre.

With regard to comparison goods, 23% of respondents stated that the centre was this main centre for comparison shopping compared to 57% stating that Leeds City Centre was the main centre for this kind of shopping. For bulky goods, 21% of shoppers stated that Armley was their main centre for this shopping compared to 37% stating they visited Leeds city centre.

Average spend in the centre on all goods is estimated at approximately £20.

The majority of shoppers visit the centre from their home and 74% of respondents stated they walked to the centre

When asked their opinion of the centre the majority of shoppers (60%) thought it was about right, although 34% thought the centre was too small. 82% of shoppers thought the layout of the centre is good and the centre was described as ok/alright by 38% of shoppers.

The supermarket, Wilkinsons and the Boots the chemist were identified as the most important shops in the centre.

When asked how the centre could be improved, 59% of respondents stated that a wider choice and variety of shops would improve it. 37% suggested better/ more toilets would benefit the centre and 17% suggested better cleanliness.

**Business Survey**

A business survey was carried out in the town centre in Summer 2010, the survey achieved 25 completed surveys out of 132 outlets. The majority of shops surveyed were under 500 sq ft in sales area and were independent businesses. Of the businesses interviewed, just under half had been operating in the centre for over a year and of these businesses, on average the profitability and turnover had decreased in the past year. The majority of respondents stated their business would remain static over the next 12 months.

When asked their opinion of the centre generally, the majority of respondents considered that Armley town centre was too down market. Equal number of respondents stated that the centre's current shopping space and trading mix was too small and not of the right mix, however the majority (72%), of businesses considered that the layout of the centre was fine as it is.

When questioned about factors that affect the success of Armley centre the results are relatively inconclusive on whether the ability to park affects the centre with similar percentages suggesting that parking was quite good and very poor. Public transport services and pedestrian access were considered to be good.

The range and quality of goods available in the centre was considered to be average, neither good nor poor, however the liveliness and character of the general shopping environment was considered to be quite poor.

The majority of respondents stated that trading has got a lot worse (36%) in the past five years and the present number of vacant units is considered to be unacceptable. When asked how they would like to see the centre improve in the future, a small majority of respondents (52%) stated that they would be in favour of additional retail floorspace being provided.

Respondents stated that seeking to improve the quality of shops and businesses, improving and extending public car parking in the centre and improving the quality of the shop units would help to improve the future of Armley.

Whilst the existing supermarket is identified as an important retailer in the centre in terms of attracting customers a number of respondents also stated that an additional supermarket would improve the retail offer and attraction to customers.

## Vacancy Levels and Average Rents

Whilst the Goad survey in 2010 identified vacancy levels of 17% a more recent visit by CI estimates vacancies have increased to nearer 20%. Average rents are estimated at £12psf overall, however these rents vary depending on the type and size of unit and its position on the high street.

## Centres Performance/Agent Perceptions

| | |
|---|---|
| Yields | **10%** |
| Example requirements from retailers | **none** |
| Suitable for modern retailing | **yes** |
| Centre expanding or contracting | **Contracting** |
| Centres performance | **Declining** |
| Future of centre | **Right size** |

**APPENDIX 7C: HEALTHCHECKS-**

## Introduction

**Boston Spa** is located approximately 16.8 km (10.4 miles) north-east of Leeds City Centre in zone 7, Outer North East, with the prime shopping street being High Street.

## Stores Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 7 | 9.7 | 8.9 | 7.61 |
| Comparison | 15 | 20.8 | 24.3 | 29.24 |
| Service | 27 | 37.5 | 50.6 | 47.1 |
| Vacant | 6 | 8.3 | 8.2 | 10.41 |
| Miscellaneous | 17 | 23.6 | 7.1 | 5.64 |
| **Total** | 72 | 100 | 100 | 100 |

Source: Leeds City Council Data, Centre Surveys 2010

## Retailer Representation and Services

This is a small centre situated along High Street with no obvious anchor store. The convenience offer comprises a small Londis and other small independent retailers. The comparison goods offer comprises wholly independent retailers. Services in the centre include a Post Office, banks and a number of surgeries.

## Environmental Quality

The centre has a linear layout with the primary shopping frontages separated along the high street by employment units and residential areas. The units are generally old and poorly configured with no purpose built units within the centre. However, the relatively quiet road (since the lorry ban) provides a pleasant shopping environment.

## Pedestrian Activity

Pedestrian activity is low in comparison to other district centres. The linear and fragmented form of the centre does not create any natural focal point or hub.

## Accessibility (Transport)

The High Street is relatively quiet and there is no on-street parking available. There is a bus route and a number of bus stops along the high street.

## Car Parking

Parking for the centre is provided in the large off-street car park off Bridge Road.

### Surrounding Uses

The centre is surrounded by housing, with playing fields to the south.

### Vacancy Levels and Average Rents

The table above suggests vacancy levels of approximately 10%, a more recent visit by CI in October 2010 suggests these have increased. Average rents are estimated to be £12psf.

### Centres Performance/Agent Perceptions

| | |
|---|---|
| Yields | **7.5%** |
| Example requirements from retailers | **none** |
| Suitable for modern retailing | **no** |
| Centre expanding or contracting | **Contracting – competition from Wetherby** |
| Centres performance | **Declining** |
| Future of centre | **Contracting** |

## APPENDIX 7C: HEALTHCHECKS

### Introduction

**Bramley** town centre is located approximately 5.4 km (3.4 miles) west of Leeds City Centre in Zone 5, Inner West. The shopping area comprises a purpose built centre off Upper Town Street, with some more recent development and other uses behind.

### Store Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 5 | 10.4 | 8.9 | 7.61 |
| Comparison | 19 | 39.5 | 24.3 | 29.24 |
| Service | 14 | 29.1 | 50.6 | 47.1 |
| Vacant | 2 | 4.1 | 8.2 | 10.41 |
| Miscellaneous | 8 | 16.6 | 7.1 | 5.64 |
| **Total** | 48 | 100 | 100 | 100 |

Source: Leeds City Council Data, Centre Surveys 2010

### Retailer Representation and Services

Bramley is based on purpose built shopping centre with a wide range of shops serving every day needs. The centre is anchored by a Tesco foodstore and is supported by a number of national occupiers.

Convenience goods are provided by Tesco and regional/ national bakers and frozen food operators. Comparison goods are provided by Boots amongst others and the centre has a good range of retail services including Halifax Bank, Ladbrokes and Blockbuster. A number of local occupiers occupy the secondary parade situated by the bus station.

To the rear of the main centre a recent development on the site of a previously vacant building provides a Farm Foods store and a comparison unit (Dogs R Us). It also has a large veterinary practice. The centre does not include the library, which is some distance away along Hough Lane.

### Environmental Quality

The environmental quality of the centre is considered to be good with recent investment in the Tesco foodstore. There is also an area of public realm around the bus station area although it is considered this could be improved.

### Pedestrian Activity

Pedestrian activity in the centre is high in the safe environment created by the purpose built shopping centre. There is a pedestrian route from the main centre to the units to the rear although it is not considered the route attracts large numbers of footfall.

**Accessibility (Transport)**

Accessibility to the centre is good both by car and public transport with a bus station provided in the southern part of the shopping centre.

**Car Parking**

The centre is built around an off-street car park which provides a large number of free spaces for visitors and shoppers to the centre to use.

The units to the rear have separate private car parks.

**Surrounding Uses**

The centre is surrounded by housing and employment.

**Vacancy Levels and Average Rents**

Vacancy levels at the centre were estimated to be low at 5% with average rents in the centre are estimated to be £31psf within the shopping centre.

**Centres Performance/Agent Perceptions**

| | |
|---|---|
| Yields | **8%** |
| Example requirements from retailers | **Value requirements from regional/national occupier** |
| Suitable for modern retailing | **yes** |
| Centre expanding or contracting | **Expanding** |
| Centres performance | **stable** |
| Future of centre | **Stable, may expand in the future** |

## APPENDIX 7C: HEALTHCHECKS

### Introduction

**Chapel Allerton** is located approximately 3.2 km (2 miles) north of Leeds City Centre in Zone 2, Inner North East. The prime shopping areas are Harrogate Road and Stainbeck Lane.

### Store Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 9 | 7.5 | 8.9 | 7.61 |
| Comparison | 22 | 18.3 | 24.3 | 29.24 |
| Service | 53 | 44.1 | 50.6 | 47.1 |
| Vacant | 10 | 8.3 | 8.2 | 10.41 |
| Miscellaneous | 26 | 21.6 | 7.1 | 5.64 |
| **Total** | 120 | 100 | 100 | 100 |

Source: Leeds City Council Data, Centre Surveys 2010

### Retailer Representation and Services

Chapel Allerton is a relatively large centre anchored by a Somerfield foodstore. The primary shopping frontages are around the junction of Harrogate Road and Stainbeck Lane with secondary units extending north and south down Harrogate Road. The northern part of the centre is fragmented with a long section of housing breaking up the retail frontage.

The centre contains a large number of services, extending down Harrogate Road and along Stainbeck Lane, including a library, banks, hairdressers, bars and restaurants. The centre offers a good mix of local and national occupiers providing a good range of convenience comparison and service units.

### Environmental Quality

Chapel Allerton has a good environment comprising a mixture of purpose built retail units and older units focused around the Harrogate Road/Stainbeck junction which creates a vibrant hub. There are a number of bars, cafes and restaurants within the centre which have outdoor seating areas which add to the pleasant environment.

### Pedestrian Activity

Pedestrian activity in the centre is high due to the services available. Pedestrian crossings are provided on Stainbeck Lane and Harrogate Road.

### Accessibility (Transport)

Traffic in the centre flows relatively well. There are bus routes along Harrogate Road and Stainbeck Lane which provide access to all areas of Leeds.

### Car Parking

On-street car parking is provided on Harrogate Road and Stainbeck Lane and there is off-street parking provided to the rear of the Somerfields store.

### Surrounding Uses

Housing surrounds the town centre.

### Vacancy Levels and Average Rents

Following a site visit by CI vacancy levels at the centre are estimated to be lower than those recorded by Leeds City Council at 5% with average rents estimated at £29psf.

### Centres Performance/Agent Perceptions

| | |
|---|---|
| Yields | **7%** |
| Example requirements from retailers | **Loaf Hair and good quality local/ regional occupiers** |
| Suitable for modern retailing | **yes** |
| Centre expanding or contracting | **Currently expanding** |
| Centres performance | **Improving** |
| Future of centre | **Expand** |

## APPENDIX 7C: HEALTHCHECKS

### Introduction

**Cross Gates** town centre is situated approximately 6.2 km (3.9 miles ) to the east of Leeds City Centre falls into zones 1 and 6, Inner East and Outer East. The centre comprises a purpose built shopping centre and encompasses other larger units along Station Road and the junction of Cross Gates Road.

### Stores and Floorspace Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 18 | 8.8 | 8.9 | 7.61 |
| Comparison | 60 | 29.3 | 24.3 | 29.24 |
| Service | 111 | 54.1 | 50.6 | 47.1 |
| Vacant | 11 | 5.4 | 8.2 | 10.41 |
| Miscellaneous | 5 | 2.44 | 7.1 | 5.64 |
| **Total** | 205 | 100 | 100 | 100 |

| | Sq ft net | % | National Average % |
|---|---|---|---|
| Convenience | 37,900 | 9.3 | 11.48 |
| Comparison | 145,600 | 35.8 | 29.44 |
| Service | 193,500 | 47.6 | 43.6 |
| Vacant | 14,800 | 3.6 | 8.3 |
| Miscellaneous | 14,900 | 3.7 | 7.18 |
| **Total** | 406,700 | 100 | 100 |

Source: Experian Goad Centre Category Report 27/01/2010

### Retailer Representation and Services

Cross Gates comprises a large purpose built shopping centre surrounded by a number of other converted and purpose built single units. The centre has a number of national occupiers, including Tesco, Superdrug, New Look, Peacocks and Fulton Foods.

Convenience goods are provided by Tesco, Fulton Foods and M&S in addition to a number of bakers and butchers. There is a wide range of comparison goods provided by national and local retailers including New Look, Peacocks, Superdrug and Clinton Cards. The centre contains a large number of services including retail services such as hairdressers and estate agents in addition to banks, surgeries and a library.

## Environmental Quality

The purpose built shopping centre provides a good environment for shoppers. However, the environment of the units within the wider town centre boundary are considered less attractive due to the busy roads running through the centre. The centre has benefited from some public realm improvements around Austhorpe Road and the gateway to Cross Gates Centre.

## Pedestrian Activity

Pedestrian activity within the purpose built shopping centre is high. However, connectively with other units in the centre is considered poor due to the natural barrier formed by Station Road.

## Accessibility (Transport)

Accessibility to the town centre is good with road and rail access and regular bus services provided along Station Road and Austhorpe Road.

## Car Parking

Car parking for the centre is good with large areas of off-street parking provided within the Cross Gates shopping centre an the individual retail units in the wider centre.

## Surrounding Uses

Housing surrounds the town centre, the railway line runs in an east west direction towards the south of the town centre.

## Vacancy Levels and Average Rents

Following a visit to the centre in October 2010 CI estimates vacancy levels to be slightly higher than those recorded by Goad at nearer 10% with average rents in the centre estimated to be £42psf.

## Centres Performance/Agent Perceptions

| | |
|---|---|
| Yields | **7.5%** |
| Example requirements from retailers | **T mobile, Pizza hut** |
| Suitable for modern retailing | **yes** |
| Centre expanding or contracting | **Static** |
| Centres performance | **Stable** |
| Future of centre | **right size** |

## APPENDIX 7C: HEALTHCHECKS

### Introduction

**Dewsbury Road** town centre is located approximately 2.7 km (1.7 miles) south of Leeds City Centre in Zone 4, Inner South. The prime shopping street is Dewsbury Road with the centre forming a linear centre along this.

### Stores Summary

| | Number | % | District Centre Average % | National Average % |
|---|---|---|---|---|
| Convenience | 11 | 14.2 | 8.9 | 7.61 |
| Comparison | 10 | 12.9 | 24.3 | 29.24 |
| Service | 41 | 53.2 | 50.6 | 47.1 |
| Vacant | 7 | 9 | 8.2 | 10.41 |
| Miscellaneous | 8 | 10.3 | 7.1 | 5.64 |
| **Total** | 77 | 100 | 100 | 100 |

Source: Leeds City Council Data, Centre Surveys 2010

### Retailer Representation and Services

The centre is a relatively small town centre with no obvious anchor store following the closure of the former convenience store. Convenience shopping is provided by a Tesco Express, Nisa and independent retailers in addition to Greggs the bakers. There is very little comparison shopping but the centre does benefit from a pharmacy.

There are a number of hot food takeaways and retail services in the centre including banks, Post Office, surgeries and hairdressers. In addition, a library and a one stop centre are located opposite the main parade.

### Environmental Quality

The centre comprises small and outdated units that are poorly configured and the centre generally lacks a focal point. There is a lack of public realm or recent investment.

### Pedestrian Activity

Pedestrian activity is moderate along Dewsbury Road, the linear and fragmented retail frontages and busy road do not encourage movement.

### Accessibility (Transport)

Dewsbury Road is a busy road providing access into Leeds City Centre. Bus services are provided along Dewsbury Road providing access to the wider area.

**Car Parking**

There is no on-street car parking permitted on Dewsbury Road and parking on the side streets is also partly restricted. Off-street car parking is provided to the rear of the former convenience store off Dewsbury Road.

**Surrounding Uses**

The town centre is surrounded by high density housing.

**Shopper Survey**

A survey of 100 shoppers was carried out in the centre in Summer 2010. The majority of respondents (56%) stated that the main reason for visiting centre was to shop for goods, other reasons were to pay bills and visit the services. Of those surveyed 52% bought convenience goods from the centre and average spend on all goods is estimated at approximately £18.21. The majority of shoppers visit the centre from their home and 74% of respondents stated they walked to the centre

With regard to comparison goods only, the majority of shoppers visit White Rose followed by Leeds City Centre. For Bulky goods the majority of respondents visit Birstall retail Park.

When asked their opinion of Dewsbury Road centre the majority of shoppers thought it was about right, although 34% thought the centre was too small. 82% of shoppers thought the layout of the centre is good and the centre was described as ok/ alright by 38% of shoppers.

The supermarket, and chemist were identified as the most important shops in the centre. When asked how the centre could be improved, 59% of respondents stated that a wider choice and variety of shops would improve it. 37% suggested toilets would benefit the centre and 17% suggested better cleanliness.

**Business Survey**

A survey of 16 businesses was carried out on Dewsbury Road in Summer 2010, the majority of which were independent businesses under 500 sq ft in sales area.

Of the businesses surveyed that have been operating from the centre for over a year, the majority considered that their sales turnover and profitability has decreased in the past year and the majority of respondents considered this trend would continue over the next 12 months. Despite this respondents stated that the sales performance of their store was about right and that their premises were good. When asked to describe Dewsbury Road as a centre 50% considered the shopping offer was too down market.

When asked to rate the centre, the majority of respondents considered that the general shopping appearance and traffic congestion within the centre was quite poor. The availability of car parking within the centre was identified as being very poor, although pedestrian access was considered to be quite good.

When asked how the centre has changed in the past five years 50% of respondents considered that trading performance had got a lot worse and a large majority (81%) considered that the number of vacant units within the centre was unacceptable.

In planning for the future, the majority of respondents stated that they would be in favour of additional retail floorspace being provided and that attracting high street shops, providing better parking and improving the appearance of the centre's street was the most important thing in promoting and enhancing the centre in the future.

**Vacancy Levels and Average Rents**

Following a site visit CI estimate vacancy levels at 10%. Average rents in the centre are estimated to be relatively low at £10psf.

**Centres Performance/Agent Perceptions**

| | |
|---|---|
| Yields | **10%** |
| Example requirements from retailers | **None** |
| Suitable for modern retailing | **No** |
| Centre expanding or contracting | **Static/contracting** |
| Centres performance | **Stable** |
| Future of centre | **Contract** |