

APPENDIX 7C: HEALTHCHECKS

Introduction

Pudsey is a large and busy town centre located approximately 7.5 km (4.7 miles) south west of the Leeds City Centre in Zone 10, Outer West. The prime shopping streets are Lidget Hill and Low Town.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	16	10.4	8.9	7.61
Comparison	30	19.5	24.3	29.24
Service	89	57.8	50.6	47.1
Vacant	12	7.8	8.2	10.41
Miscellaneous	7	4.5	7.1	5.64
Total	154	100	100	100

	Sq ft net	%	National Average %
Convenience	16,700	7.2	11.48
Comparison	39,200	16.7	29.44
Service	161,400	69.4	43.6
Vacant	9,100	3.9	8.3
Miscellaneous	6,100	2.6	7.18
Total	23,2500	100	100

Source: Experian Goad Centre Category Report 12/05/2009

Retailer Representation and Services

This is a large and busy town centre anchored by Sainsburys Local on Church Lane. The Sainsburys store provides the main convenience offer in the town centre. There are a range of comparison goods provided by both national and local occupiers, including Boots and Specsavers.

The centre has a wide range of services including a large leisure centre, library and Post Office in addition to retail services such as banks and estate agents.

Environmental Quality

The centre comprises a mix of old and new units, the main shopping parade is located on the corner of Lidget Hill and Church Lane and comprises purpose built units and offers a pleasant environment with planting in front of the units on Lidget Hill. The bus station on Church Lane has recently undergone refurbishment and

offers a pleasant area for shoppers visiting the town centre. The refurbishment included architectural lighting to the town hall which further enhances the environment.

The shopping activity is centred around the junction of Church Lane and Lidget Hill which is a busy junction and is often congested. The environment is enhanced with off street planting of the road barriers around this junction.

Pedestrian Activity

Pedestrian activity in the centre is high, particularly along Church Lane and Lidget Hill where the main services are located. Pedestrian activity reduces further to the east of the town centre along Low Town.

Accessibility (Transport)

Traffic within the centre is relatively noisy and congested at times due to the route through the centre being a main arterial route through Pudsey. Access by public transport is good with a bus station located within the town centre off Church Lane.

Car Parking

Car parking in the centre is good with a car park located to the rear of the retail units on Lidget Hill which has recently undergone a refurbishment scheme including new floodlighting. There is also a large car park associated with the leisure centre to the south of the defined town centre.

Surrounding Uses

The centre is surrounded by relatively high density residential development. Pudsey Park is located to the south west of the town centre.

Vacancy Levels and Average Rents

Following a site visit, vacancy levels are considered to have increased since 2009 and are estimated to be nearer 15%. Rents are estimated to be £40psf.

Shopper Survey

A shopper survey of 100 shoppers was carried out in Pudsey town centre in Summer 2010. When asked what their main reason was for visiting the town centre, a relatively small majority, 35% stated that they were shopping for goods. A large number, 22% stated that they were visiting services/paying bills and 12% of respondents worked in the centre. The majority of respondents purchased food to take home, 51% with 20% purchasing chemist goods and 28% visiting banks and financial services. With regard to the average spend of shoppers surveyed, this was calculated as £11.87 which is relatively low in comparison to other centres surveyed, although this could be a result of the relatively small sample size and the relatively high number of respondents that had visited banks and financial services.

With regard to comparison shopping, the majority of respondents, 43%, stated that Leeds City Centre was their main centre for non-bulky and non-food shopping. 21% visit White Rose Centre, 13% visit the Owlcotes Centre in Pudsey and 10% of respondents stated that Pudsey town centre was their main shopping for this type of

shopping. With regard to bulky non-food shopping, the majority of respondents, 33% considered both the retail park at Junction 27 was the main centre for this type of shopping. 14% of shoppers considered Crown Point Retail Park and Leeds City Centre as their main centre for bulky non-food shopping, with only 3% considering Pudsey as a centre for this type of shopping.

The majority of respondents visited Pudsey town centre from home (75%) with 47% walking all the way. Relatively high numbers of respondents travelled by car and bus, 26% and 17% respectively.

When asked to describe the shopping in Pudsey town centre, 52% of respondents stated there were too many small independent shops and 42% stated it was about right. Again, a small majority considered the layout of the centre was acceptable, although 41% stated that it was too compact and could get congested at times.

The supermarket, Boots, specialist foodstores and the Pound Shop/Home Bargains store were considered to be the most important shops in the centre

When asked how the centre could be improved, a small majority suggested a wider choice and variety of shops. This was closely followed by a bigger/better market, other points for improvement were less traffic congestion, better toilets, better parking facilities and better quality of stores and better cleanliness.

Business Survey

A survey was carried out in Summer 2010 of the existing businesses in Pudsey town centre, 24 completed surveys were achieved, the majority of which were from independent businesses of less than 1,000 sq ft. Of the businesses surveyed that have been operating from the centre for more than a year, the sales turnover and profitability on average have decreased. The majority of businesses considered that their sales turnover would remain static over the next 12 months.

In considering Pudsey town centre overall the majority of businesses considered that the shopping offer was too down market. When asked to rate the centre against a number of criteria, respondents highlighted the availability of parking being very poor and traffic congestion within the centre to be poor. Public transport, services and pedestrian access was considered to be good and the majority of respondents considered the range and quality of goods within the centre was quite good.

However, with regard to the character and appearance of the centre the results were inconclusive with similar percentages of respondents stating that the character was quite good compared to very poor.

When asked to consider the performance of the centre over the past five years, the majority of respondents considered that the centre had got a little worse and that the number of vacant units was unacceptable.

When considering if additional new retail floorspace should be provided in the centre, a small majority 54% considered that this would be beneficial. Increasing the range of retailers, improving car parking and improving the quality of shop units were considered to be the most important things to enhance the centre in the future.

Centres Performance/Agent Perceptions

Yields	8%
Example requirements from retailers	British Heart Foundation, Subway
Suitable for modern retailing	Yes
Centre expanding or contracting	Expanding
Centres performance	Stable
Future of centre	Expand

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Rothwell

Rothwell town centre is located approximately 7.4 km (4.6 miles) south east of Leeds City Centre in Zone 9, Outer South. The centre comprises a traditional high street which has been pedestrianised and a new development of purpose built units along with a number of associated services.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	7	7.4	8.9	7.61
Comparison	23	24.5	24.3	29.24
Service	57	60.6	50.6	47.1
Vacant	5	5.3	8.2	10.41
Miscellaneous	2	2.1	7.1	5.64
Total	94	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

This is a relatively large and busy centre anchored by a modern Morrison foodstore in a new development adjoining Commercial Street. A number of adjoining units provide some additional convenience goods and a variety of comparison goods. National retailers include, Specsavers opticians, Co-op travel, in addition to independent pet shops and clothes shop.

Commercial Street offers a range of older smaller units occupied by local retailers providing additional convenience goods and a variety of charity shops, Boots and independent shops provide comparison goods.

The centre has a good range of retail services including banks, a post office and estate agents. There is also a wide range of amenities including a library, college, working mens club and council offices.

Environmental Quality

The centre comprises a purpose built retail park with a pleasant parade of shops. The new units link well with the traditional shopping area on Commercial Street which is a pedestrianised street with pleasant areas of public realm.

Pedestrian Activity

Pedestrian activity within the centre is considered to be good with good linkages provided from the new development to the traditional shopping area and on through the centre to the services located in the south of the defined centre.

Accessibility (Transport)

One way road systems operate around the town centre but accessibility is considered to be generally good with regular bus services serving the town.

Car Parking

The centre benefits from a number of large free car parks associated with the new Morrisons store and the services within the centre.

Surrounding Uses

The centre is surrounded by relatively low density residential development and employment uses.

Vacancy Levels and Average Rents

The centre had a small number of vacant units at the time of our visit in the older units on Commercial Street, however, levels are estimated at between 5% and 10%. Colliers International estimate that average rents in the centre are £13psf.

Centres Performance/Agent Perceptions

Yields	8%
Example requirements from retailers	Local and limited national/value
Suitable for modern retailing	Yes
Centre expanding or contracting	Expanding
Centres performance	Improving
Future of centre	Expanding

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Seacroft town centre is located approximately 6.2 km (3.9 miles) north east of Leeds City Centre in Zone 1, Inner East. The centre comprises purpose built units and a number of associated services.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	3	13	8.9	7.61
Comparison	4	17.4	24.3	29.24
Service	14	60.9	50.6	47.1
Vacant	2	8.7	8.2	10.41
Miscellaneous	0	0	7.1	5.64
Total	23	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

This is a large and busy centre anchored by the large Tesco Extra store, providing a range of convenience and comparison goods. A number of adjoining units provide a variety of additional convenience and comparison goods, including national retailers Peacocks, Superdrug, Johnsons, Thomas Cook, Jack Fulton and the Post Office. Subway and Greggs are also represented.

Services include a library, clinic and surgery for the surrounding residents.

Environmental Quality

The centre comprises a purpose built retail park with car parking provided to the front. The consolidated range of shopping units provides a good shopping environment, however the overall environment of the centre is considered to be poor as a result of the large car park.

Pedestrian Activity

Pedestrian activity in the centre is considered to be relatively low as the centre is dominated by the Tesco Extra which creates a destination centre dominated by visitors using the car.

Linkages through the centre to the surrounding services is considered to be relatively poor due to the arrangement of these uses around and indeed to the rear of the retail units. There are however, good pedestrian routes from the bus terminus into the area to the south.

Accessibility (Transport)

Traffic within the centre is relatively quiet and slow by virtue of the layout which deters through traffic. Access by public transport is good with buses entering the centre and stopping close to the large Tesco Extra.

Car Parking

Car parking in the centre is good with a large car park to the front of the Tesco Extra and other retail units. The library and other clinics also have dedicated parking available.

Surrounding Uses

Surrounding uses comprise residential development and large areas of open space.

Vacancy Levels and Average Rents

No vacant units were seen at the time of our visit, average rents are estimated to the £15psf.

Centres Performance/Agent Perceptions

Yields	10%
Example requirements from retailers	Local and Value
Suitable for modern retailing	Yes
Centre expanding or contracting	Contracting
Centres performance	Stable
Future of centre	Right size

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Wetherby town centre is located approximately 17.8 km (11.1 miles) north east of Leeds City Centre in Zone 7, Outer North East. The prime shopping streets are the Market Place and High Street.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	19	9.2	8.9	7.61
Comparison	67	32.4	24.3	29.24
Service	96	46.4	50.6	47.1
Vacant	9	4.4	8.2	10.41
Miscellaneous	16	7.7	7.1	5.64
Total	207	100	100	100

	Sq ft net	%	National Average %
Convenience	51,100	17.7	11.48
Comparison	71,000	24.6	29.44
Service	128,000	44.4	43.6
Vacant	8,100	2.8	8.3
Miscellaneous	30,000	10.4	7.18
Total	28,8200	100	100

Source: Experian Goad Centre Category Report 15/07/2009

Retailer Representation and Services

This is a very large and busy town centre with Morrisons acting as an anchor. The town centre comprises traditional units situated around the Market Place and the Town Hall and new units within and around the Horsefair Centre following the redevelopment of this part of the centre.

The large Morrisons store, a Co-Op Late shop, M&S Simply Food and other independent retailers provide the convenience goods in the centre.

Comparison goods are provided by a mix of national and local occupiers, including Peter Jones, Country Casuals, Clinkard and Boots.

Services in the centre include a library, the Town Hall, Council offices and a range of retail services including banks, estate agents and a Post Office.

Environmental Quality

The centre comprises a mix of the traditional market town centre, in addition to newer purpose built units of the Horsefair Centre and the new M&S Simply Food on the site of the former cattle market.

These mix of units provide a vibrant and pleasant environment for shopping mixing between the traditional market place and the newer areas of the town. In addition a regular street market is held in the Market Place adding to the vibrancy of the centre.

A scheme to improve pedestrian access to the Market Square, Wetherby Horsefair and the surrounding area has recently been completed and has improved the overall environment of the town.

Pedestrian Activity

Pedestrian activity in the centre is high and movement throughout it encouraged due to a strong retail and services core with employment uses on the periphery of the defined town centre.

Accessibility (Transport)

Traffic within the centre is congested at times on Market Place, especially on market days. However, this is expected in traditional centres such as this. There is good public transport access with bus routes along market place and the high street.

Car Parking

Car parking within the centre is good with on street parking available in addition to off street car parks around the Horsefair Centre.

Surrounding Uses

The centre is surrounded by a mix of uses, including residential, employment, leisure and open space.

Vacancy Levels and Average Rents

Vacancy levels in the centre are very low with average rents estimated to be £22psf.

Centres Performance/Agent Perceptions

Yields	6.5%
Example requirements from retailers	Peacocks, Loaf, regional fashion
Suitable for modern retailing	Yes
Centre expanding or contracting	Stable
Centres performance	Stable
Future of centre	expand

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Yeadon town centre is located approximately 11.5 km (7.1 miles) north west of Leeds City Centre in Zone 8, Outer North West. The main shopping area is located along High Street.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	12	8.76	8.9	7.61
Comparison	30	21.9	24.3	29.24
Service	83	60.6	50.6	47.1
Vacant	7	5.1	8.2	10.41
Miscellaneous	5	3.7	7.1	5.64
Total	137	100	100	100

	sqm net	%	National Average %
Convenience	57,900	23	11.48
Comparison	63,300	25.1	29.44
Service	120,600	47.8	43.6
Vacant	6,600	2.6	8.3
Miscellaneous	3,800	1.51	7.18
Total	25,2200	100	100

Source: Experian Goad Centre Category Report 07/07/2009

Retailer Representation and Services

This is a relatively small town centre in a linear form, anchored by Morrisons supermarket. Morrisons is located at the eastern end of the centre and provides the main convenience retailing in addition to an independent butchers and greengrocers on the high street.

Comparison goods in the centre are provided by independent retailers. A number of retail services are available in the centre including banks and estate agents. A Homebase store is located at the far western end of the defined centre, providing comparison bulky goods.

Services within the centre include a library and the Town Hall.

Environmental Quality

The centre comprises a purpose built Morrisons superstore and adjacent units and traditional properties along High Street. The older properties and one way street creates a relatively and quiet environment for shoppers.

Improvements to the centre including new street furniture and traffic calming measures have further enhanced the pleasant environment of the centre.

Pedestrian Activity

Pedestrian activity in the centre is high and benefits from the relatively quiet High Street which enables easy movement across the road. It is considered that pedestrian activity from the eastern end down to the western end is limited due to the topography of the centre.

Accessibility (Transport)

Accessibility to the centre is restricted due to the one way street system. However access is possible along the High Street by private cars and a bus service runs through the centre.

Car Parking

Car parking in the centre is good with off-street available along the High Street in addition to the large car park to the rear of the foodstore and off Silver Lane.

Surrounding Uses

The centre is surrounded by residential development, with Yeadon town to the east.

Vacancy Levels and Average Rents

Vacancy levels in the centre are low with average rents estimated to be £14psf.

Centres Performance/Agent Perceptions

Yields	7%
Example requirements from retailers	Sainsbury's Local
Suitable for modern retailing	No
Centre expanding or contracting	Static
Centres performance	Stable
Future of centre	Right size