

APPENDIX 7C: HEALTHCHECKS

Introduction

Halton is located approximately 4.9 km (3 miles) east of Leeds City Centre in Zone 6, Outer East. The main shopping area is located around the junction of Selby Road and Primrose Lane.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	8	10.3	8.9	7.61
Comparison	20	25.9	24.3	29.24
Service	33	42.8	50.6	47.1
Vacant	4	5.1	8.2	10.41
Miscellaneous	12	15.5	7.1	5.64
Total	77	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

Halton is a relatively compact centre, with units centred around the large Matalan store and associated shopping parades on the northern side of Selby Road. New development on the southern side of Selby Road includes a new Lidl store in the western part of the centre and a Co-Op foodstore in the east, in between is a new development of residential apartments with retail units on the ground floor.

Convenience offer in the centre is good provided by the Co-Op, Lidl, Tesco and Fulton Foods. Comparison shopping includes Matalan, Boots and a number of independent occupiers.

Services include a library and clinic in addition to retail services including banks.

Environmental Quality

The centre comprises mainly new purpose built units on the prime pitch at the junction of Selby Road and Primrose Lane. Whilst Selby Road is a relatively busy road, the wide pavements, street furniture, landscaping and dedicated shopping parades improve the shopper environment, of note is the public realm in front of the Lidl foodstore.

Pedestrian Activity

Pedestrian activity in the centre is good and movement within it is also considered to be good with pedestrian crossings providing safe routes across Selby Road at opposite ends of the centre.

Accessibility (Transport)

Access to the centre by car and public transport is good with bus routes along Selby Road.

Car Parking

Car parking in the centre is considered to be good. Whilst parking is restricted on Selby Road, there is excellent off-street parking at the new Lidl foodstore and at the rear of the Matalan.

Surrounding Uses

The surrounding uses are residential.

Vacancy Levels and Average Rents

Vacancy levels in the centre are low. There was no evidence of average rents on the database, however we estimate these to be comparable to other centres at approximately £13psf.

Centres Performance/Agent Perceptions

Yields	7.5%
Example requirements from retailers	Value/ Bookmakers/Hot food
Suitable for modern retailing	yes
Centre expanding or contracting	Expanding
Centres performance	Improving
Future of centre	Expand

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Introduction

Harehills Corner town centre is located approximately 2.6 km (1.6 miles) east of Leeds City Centre in Zone 1, Inner East. The prime shopping street is Roundhay Road and the centre forms a linear centre along this.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	8	7	8.9	7.61
Comparison	32	28	24.3	29.24
Service	64	56.1	50.6	47.1
Vacant	6	5.3	8.2	10.41
Miscellaneous	4	3.5	7.1	5.64
Total	114	100	100	100

	Sq ft net	%	National Average %
Convenience	15,100	10.4	11.48
Comparison	40,700	28	29.44
Service	66,200	45.6	43.6
Vacant	16,200	11.2	8.3
Miscellaneous	6,900	4.8	7.18
Total	145,100	100	100

Source: Experian Goad Centre Category Report 11/09/2007

Retailer Representation

Harehills Corner is an old and outdated shopping centre now dominated by hot food takeaways. The centre has no obvious anchor, the former convenience store within the parade of newer units ceased operating many years ago.

Convenience goods are now provided by a Farmfoods and a Continental supermarket in addition to independent foodstores offering ethnic goods.

There is very limited comparison goods offered within the centre with any comparison goods offered by independent retailers including a clothing store and a jewellery store.

The centre has a large range of retail services, including a Post Office, betting shops, hairdressers and a number of independent/local financial institutions.

The centre lacks any library, health centre or community facilities.

Environmental Quality

The environmental quality of the centre is considered to be poor with the centre comprising poorly configured old units and the small parade of purpose built units are now outdated.

Roundhay Road is a very busy road which along with the busy roads feeding into this divides and fragments the centre, the busy junctions further detracts from the environment. The centre lacks any areas of public realm. It is noted that some improvements have been made to the row of shops at the bottom of Harehills Road comprising new street bollards and tree planting.

Pedestrian Activity

Pedestrian activity in the centre is average, the fragmented nature of the centre as a result of the many road junctions and fragmented retail frontages further restricts pedestrian activity.

Accessibility (Transport)

Traffic in the centre is very high as a result of Roundhay Road being a main arterial route into Leeds. The centre is highly accessible by public transport with bus stops located on Roundhay Road and Harehills Lane.

Car Parking

Car parking in the centre is considered to be poor with very limited on-street parking, although there is a car park on the roof of the purpose built retail parade.

Surrounding Uses

The centre is surrounded by high density residential development.

Vacancy Levels and Average Rents

Following a visit by CI to the centre in October 2010 vacancy levels are estimated to be nearer 20%, this compares to the Goad survey information from 2007 of 5.3% . It is accepted that vacancy levels are likely to have increased over the time between the survey and visit. However, the large difference in figures may also be attributed to the CI estimate being an overall perception of the centre which is often higher than reality as it may assume hot food takeaways or other shuttered shops to be vacant as opposed to closed. In addition vacancy levels in a centre can be perceived higher if vacant units are clustered together rather than being spread evenly through the centre. Average rents are estimated to be low at £9psf.

Shopper Survey

A survey of 100 shoppers was carried out in the centre in Summer 2010. The majority of respondents, 51% stated that the main reason for visiting the centre was to buy goods, approximately 18% of respondents worked in the centre.

The majority of shoppers, 49% bought convenience goods from the centre, 22% didn't purchase any goods, average spend on all goods in the centre is estimated at approximately £18.

With regard to comparison goods, 65% stated that Leeds City Centre was their main centre for this kind of shopping with only 17% of respondents stated that they purchased these goods in Harehills. The majority of respondents 58% stated Leeds City Centre was the main centre for bulky goods shopping, 16% of shopped at White Rose and 13% stated they shopped in Harehills for bulky goods.

The majority of shoppers visit the centre from their home and 63% of respondents stated they walked to the centre.

When asked their opinion of the centre a small majority 48% of respondents thought the centre was about right, however, 47% stated that the centre has too many small independent shops and not enough large/ multiple stores. The majority of respondents thought the layout of the centre was satisfactory although 29% considered it was too compact and could get congested at times.

The existing convenience stores were considered to be the most important shops along with the Post office and restaurants/ cafes/ takeaways. When asked what would improve the centre, respondents stated that a wider choice of shops was needed. Better parking, toilets and improved cleanliness were also highlighted as areas for improvement, 24% raised less traffic pollution as an area to improve.

Business Survey

A business survey was also carried out of the retailers operating in Harehills Corner Summer 2010. 15 businesses returned the completed surveys, the majority of which were independent businesses under 500 sq ft in sales area. Just over half of the businesses have been trading from the centre for just over a year and on average the sales turnover and profitability of these businesses has decreased. Of all the businesses questioned, the majority did not comment on their anticipated turnover in the next 12 months, however 27% of businesses considered that their sales turnover would decrease and that they would seek to achieve a higher sales density per square foot in order to maintain the viability of the store.

In shopping terms, the majority of respondents considered that the shopping offer in the centre was too down market, 67%. When asked to comment on various factors affecting the centre, the majority of respondents, 80%, considered that the availability of parking was very poor. A high percentage of respondents also considered that traffic congestion and pedestrian access was poor. The majority of respondents, over 45% considered that both the character and appearance of the centre was very poor and that this situation has worsened over the past five years with the number of vacant units being unacceptable.

When asked to comment on the future of the centre, 67% of respondents stated that they would not be in favour of additional floorspace being provided. Respondents stated that in relation to the quality of shops and businesses, improvement to the appearance of the centre and measures to reduce crime and vandalism would all help to improve the town centre in the future.

Centres Performance/Agent Perceptions

Yields	9%
Example requirements from retailers	Local retailers
Suitable for modern retailing	No
Centre expanding or contracting	Contracting
Centres performance	Stable/declining
Future of centre	Contract

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Harehills Lane is located approximately 2.6 km (1.6 miles) east of Leeds City Centre in Zone 1, Inner East. The main shopping street is Harehills Lane with secondary frontages along Compton Road. It is a centre that the CSPA suggests should be defined as a town centre.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	16	16	8.9	7.61
Comparison	33	33	24.3	29.24
Service	42	42	50.6	47.1
Vacant	9	9	8.2	10.41
Miscellaneous	0	0	7.1	5.64
Total	100	100	100	100

	Sq ft net	%	National Average %
Convenience	42,800	39.5	11.48
Comparison	24,500	22.6	29.44
Service	35,400	32.7	43.6
Vacant	5,600	5.2	8.3
Miscellaneous	0	0	7.18
Total	108300	100	100

Source: Experian Goad Centre Category Report 22/07/2010

Retailer Representation and Services

National convenience goods occupiers include Sainsburys Local, Co-Op and Fulton Foods. These are supported by a number of other convenience stores offering ethnic cuisine. The majority of comparison goods are provided by local occupiers offering fashion and household goods, many of which are aimed towards discount goods.

Services in the centre include a library, nursery, conservative club and housing and social services within the Compton Centre. In addition the centre offers retail services including banks.

On the edge of the defined town centre to the south is a new Netto foodstore providing additional convenience goods. On the edge of the centre to the north, a new Morrisons foodstore has been developed on the site of the former DIY store. The former Yorkshire Water depot site has been redeveloped as a Netto foodstore with scope for additional development linking the site to the existing boundary.

Environmental Quality

The centre comprises old and poorly configured units at the ground floor level of terraced properties. It is evident that the centre has grown and expanded in a linear form over time.

Harehills Lane is a busy road which is often congested as a result of the lights at the junction with Compton Road.

Whilst outdoor displays at a number of retail units add to the vibrancy of the town centre, the overall environment is relatively poor and in need of improvement. In particular, enhancement of the public garden in front of the library would help to improve the environment.

Pedestrian Activity

Pedestrian activity in the centre is relatively high, the main movement being along Harehills Lane. Movement along Compton Road is less with the retail units in this area declining.

Accessibility (Transport)

Traffic within the centre is high with Harehills Lane forming a busy route within the area. Bus routes are provided along Harehills Lane and Compton Road.

Car Parking

On-street car parking is available on Harehills Lane and Compton Road through the provision of parking bays. There are also a number of parking bay in front of the units to the south of Compton Road.

In addition, the Netto foodstore on the edge of the centre provides a large car park for visitors to the centre.

Surrounding Uses

The surrounding uses are predominantly residential.

Vacancy Levels and Average Rents

Vacancy levels in the centre are considered to be average with average rents estimated at £9psf overall.

Centres Performance/Agent Perceptions

Yields	9%
Example requirements from retailers	Local retailers
Suitable for modern retailing	No
Centre expanding or contracting	static
Centres performance	Stable
Future of centre	Right sized

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Headingley is located approximately 3 km (1.9 miles) north west of Leeds City Centre in Zone 3, Inner North West, with the main shopping units provided along Otley Road and North Road.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	11	6.66	8.9	7.61
Comparison	30	18.2	24.3	29.24
Service	103	62.4	50.6	47.1
Vacant	16	9.7	8.2	10.41
Miscellaneous	5	3	7.1	5.64
Total	165	100	100	100

	Sq ft net	%	National Average %
Convenience	24,100	10	11.48
Comparison	38,600	16.1	29.44
Service	147,300	61.4	43.6
Vacant	17,800	7.4	8.3
Miscellaneous	11,900	5.0	7.18
Total	239,700	100	100

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

Retailer Representation and Services

Headingley is a large centre anchored by Sainsburys and Wilkinsons. The centre comprises a mix of old units in addition to purpose built units within the Arndale Centre which have recently been refurbished.

The convenience goods are provided by Sainsburys on Otley Road, and a Local on North Lane in addition to a number of independent retailers. There is a wide range of comparison goods provided by both national, regional and local retailers, including Wilkinson, Carphone Warehouse, charity shops and jewellery and gift shops.

The centre also has a good range of services including building societies, banks, pharmacies, estate agents and a library. In addition, there are a large number of bars, cafes and restaurants throughout the centre.

Environmental Quality

Headingley is a vibrant centre with a good range of national and independent retailers. Otley Road is a major route through Leeds and is often congested within the defined town centre.

The environmental quality of the centre is considered to be average with Otley Road dividing the centre and the narrow pavements result in a lack of street furniture or areas of public realm. However, areas of public realm have been created in front of the Arndale Centre and the busy shops, bars and restaurants, some of which have outside seating do enhance the overall environment.

Pedestrian Activity

Pedestrian activity in the centre is high due to Headingley having a high student population. Movement throughout the centre is good with the range of uses spread equally throughout the centre. Pedestrian activity is aided by the provision of three pedestrian crossings along Otley Road.

Accessibility (Transport)

Traffic within the centre is high, particularly along Otley Road which is a main route in and out of the City. Bus routes are provided along Otley Road and North Road.

Car Parking

Car parking in the centre is relatively poor, with no parking available on Otley Road, although there is a car park on the roof of the Sainsburys within the Arndale Centre.

Along North Lane, car parking is provided in front of The Headingley Taps public house and also to the rear of the old cinema.

Surrounding Uses

The surrounding uses are residential with Headingley Cricket Ground/Leeds Rhinos Rugby Club lying to the south west of the centre.

Vacancy Levels and Average Rents

Vacancy levels in the centre are considered to be average, although of note is the large former cinema on North Lane. Average rents are high due to the popularity of the centre and are estimated at £42psf.

Centres Performance/Agent Perceptions

Yields	6.75
Example requirements from retailers	Loaf, Coal Bar and Grill
Suitable for modern retailing	Yes
Centre expanding or contracting	Static/ expanding
Centres performance	Improving
Future of centre	Expand

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Holt Park is located approximately 7.1 km (4.4 miles) north west of Leeds City Centre in zone 8, Outer North West. The main shopping units are located in a purpose built centre.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	1	5.5	8.9	7.61
Comparison	4	22.2	24.3	29.24
Service	5	27.7	50.6	47.1
Vacant	1	5.5	8.2	10.41
Miscellaneous	7	38.86	7.1	5.64
Total	18	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

Holt Park is a small district centre due to its consolidated form within the indoor shopping centre. The centre is anchored by a large ASDA supermarket which dominates the convenience offer. Additional retailers offer comparison and service goods.

Other services within the centre include a health centre, sports centre and surgery. The library is contained within the new high school building which does not lie with the defined centre.

Environmental Quality

The Holt Park retail centre is an old centre (1970's) with a poor shopping environment. The centre has been the subject of regeneration consultation since 2007 although no strategies have been implemented to date. Despite the poor accommodation and environment, the centre is well used with low vacancy levels.

The defined town centre comprises a much larger area including the car park for the centre and a large parking area associated with the adjoining park to the south. Immediately to the south of the retail centre is the former site of the high school, which has now relocated to an adjoining site to the west.

The environmental quality of the centre is considered to be poor with need for improvement.

Pedestrian Activity

By virtue of the indoor centre and ASDA store, pedestrian activity within it is high. Linkages within the centre, i.e. from the retail outlets to the greenspace are considered to be relatively poor.

Accessibility (Transport)

A large car park serves the centre and bus routes run along Holt Road immediately in front of the shopping centre.

Car Parking

Car parking is good within the centre with a large car park provided in front of the centre and additional parking to the south.

Surrounding Uses

The centre is surrounded by relatively low density residential and a number of green spaces and schools.

Vacancy Levels and Average Rents

Vacancy levels within the centre are considered to be low with average rents estimated at £12psf.

Shopper Survey

A survey of 100 shoppers was carried out in the centre in Summer 2010. The main reason for respondents to visit the centre was to purchase goods (92%) with the majority purchasing food to take home and only small numbers of shoppers purchasing clothing, chemist goods, textiles or leisure goods. Average spend on all goods of the shoppers surveyed is estimated at approximately £31.

With regard to comparison goods only 9% stated Holt Park was their main centre for such goods with the majority 44% identifying Leeds City Centre and 12% visiting White Rose for these goods. For bulky goods shopping the majority of respondents (24%) stated their destination varied, 13% identified Guiseley as their Bulky goods destination, 11% Leeds City Centre and 10% Crown Point retail park

Despite 91% of shoppers starting their journey at home, the majority of visitors travel by private car 67%. 21% of respondents said they walked to the centre, 10% used public transport.

When asked their opinion of the centre the majority of shoppers 56% thought the centre was about right, however, 38% stated the centre contained too many large stores and did not contain enough independent retailers. The layout of the centre is liked by shoppers (75%) and the most important shops are the supermarket and chemist.

A wider variety of shops, and better toilets were identified as areas for improvement.

Business Survey

A business survey was carried out on existing businesses within Holt Park centre in Summer 2010. The survey achieved a low response rate with only three businesses completing the survey, although these did contain a mix of national multiples, regional and independent businesses and the centre is limited.

All respondents considered that Holt Park was too down market in shopping terms, however they considered that car parking and pedestrian access was very good, public transport was considered to be good. The range and quality of goods was considered to be quite poor as well as the character and appearance of the centre overall.

When asked to compare the centre in terms of trading performance, the respondents considered that it had got a little worse and all respondents considered the number of vacant units was unacceptable.

In planning for the future, the respondents considered that additional floorspace should be provided and that the quality of shops and range of businesses should be increased and improved.

Centres Performance/Agent Perceptions

Yields	8%
Example requirements from retailers	Local/ Bookmakers/ Hot food
Suitable for modern retailing	Yes
Centre expanding or contracting	Contracting
Centres performance	Stable
Future of centre	Right size

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Introduction

Horsforth, Town Street is located approximately 7.4 km (4.6 miles) north west of Leeds City Centre in Zone 8, Outer North West, with the main shopping area concentrated along Town Street.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	11	8.2	8.9	7.61
Comparison	19	14.2	24.3	29.24
Service	83	61.9	50.6	47.1
Vacant	12	8.9	8.2	10.41
Miscellaneous	9	6.7	7.1	5.64
Total	134	100	100	100

	Sq ft net	%	National Average %
Convenience	47,700	20.7	11.48
Comparison	13,800	6.	29.44
Service	140,500	61	43.6
Vacant	9,800	4.3	8.3
Miscellaneous	18,600	8	7.18
Total	230,400	100	100

Source: Experian Goad Centre Category Report 14/01/2009

Retailer Representation and Services

Horsforth is a relatively large linear centre anchored by a Morrisons supermarket. The convenience offer is provided by the Morrisons in addition to a Sainsburys and Fulton Foods along with local independent retailers.

The comparison offer is limited and includes a number of charity shops including Oxfam and Cancer Research in addition to local retailers offering clothes and cards.

Services within the town include a library, banks and a Post Office. However the library is located at the northern end of the town centre with the majority of other services being towards the centre or southern end of the centre.

Environmental Quality

Town Street is a relatively quiet one way road lined with a number of attractive buildings which creates a pleasant environment for shoppers.

Whilst shopping in the northern part of the centre is somewhat fragmented with areas of poor or no retail frontage, the area from the Morrisons supermarket to the south provides a good shopping environment enhanced by street furniture, flowers and shop window displays, including outside displays.

Pedestrian Activity

Pedestrian activity is relatively high, the quiet road encouraging movement on both sides and throughout the centre.

Accessibility (Transport)

The nature of a one way street does of course reduce transport accessibility. However, a frequent bus route runs down Town Street and the street is also open to private vehicles.

Car Parking

Car parking in the centre is good with on-street parking available in parking bays along Town Street. In addition, there is a large off-street car park accessed from Church Road serving Morrisons and the wider centre. There are also a number of car parks within the defined centre serving the surrounding offices.

Surrounding Uses

There are a number of employment uses within the defined town centre, beyond these is relatively low density residential development.

Vacancy Levels and Average rents

Vacancy levels within the centre are estimated to be low at 5% and average rents are estimated to be £18psf.

Shopper Survey

A survey of 100 shoppers was carried out in Horsforth town centre in Summer 2010. When asked the main purpose for visiting the town centre 63% of respondents stated they were visiting to shop for goods, with 14% stating that they were visiting services to pay bills. The majority of shoppers, 70%, purchased food to take home from the town centre, with smaller numbers, 6% and 5% respectively, purchasing leisure and chemist goods. The average spend of respondents to the survey is estimated at £19.84.

With regard to comparison shopping, the majority of respondents stated that Leeds City Centre was the main centre for non-bulky and bulky non-food shopping. Guiseley was also identified as a popular centre with 15% of respondents identifying it as their main centre for bulky goods.

The survey identified that 85% of shoppers visited the centre from home, 51% of respondents walked to the centre, but car usage is relatively high at 32% and travel by public transport is average at 11%.

When asked to describe the shopping available in the centre, the majority of respondents, 68%, stated that the shopping was about right and the layout was satisfactory.

84% of respondents considered the supermarket to be the most important shops within the centre along with charity shops, the specialist food shops and the financial institutions.

When asked how the centre could be improved, the majority of people stated better toilet and better parking facilities, 24% and 25% respectively. In addition, 23% of respondents considered reduction of traffic congestion would improve the centre in addition to more leisure facilities.

Business Survey

A survey was carried out of existing businesses within Horsforth town centre in September 2010. The survey achieved 16 completed questionnaires, the majority of which were from small independent businesses. Of the businesses that have been operating in the centre for over a year, turnover and profitability was on average down by 5%. Of all the businesses surveyed, they considered that these trends would continue and that turnover and profitability of their businesses would remain static.

When asked to comment on the centres market position in shopping terms, the majority of respondents, 80%, considered that Horsforth Town Street was acceptable as a shopping town.

When asked to rate the centre against a number of criteria, the responses were varied. There was a mixture of opinions on the availability of parking with similar percentages 31% considering neither good nor poor, and 34% considering it was very poor. 56% of respondents considered that public transport services and pedestrian access was quite good in the centre. The quality and range of goods provided and character and appearance of the centre generally was considered to be quite good.

When asked to compare the centres trading performance to five years ago the majority of respondents stated that it had stayed the same/got a little stronger, however the majority of respondents, 87%, thought that the present number of vacant units was not acceptable.

When asked to comment on the future of the town centre, the majority, 66%, stated that they would be in favour of additional retail floorspace being provided, however respondents considered that in planning for the future, the centre should be improved the quality of shops, range of shops and parking provision.

Centres Performance/Agent Perceptions

Yields	7%
Example requirements from retailers	Sainsbury's, British Heart Foundation
Suitable for modern retailing	Yes
Centre expanding or contracting	Expanding
Centres performance	Improving
Future of centre	Expand

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Introduction

Hunslet is located approximately 2.6 km (1.6 miles) south of Leeds City Centre in Zone 4, Inner South. The Centre comprises a purpose built shopping centre, the Penny Hill Centre.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	6	14.6	8.9	7.61
Comparison	9	22	24.3	29.24
Service	24	58.5	50.6	47.1
Vacant	1	2.4	8.2	10.41
Miscellaneous	1	2.4	7.1	5.64
Total	41	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retail Representation and Services

Convenience offer in the centre is dominated by the Morrisons supermarket which anchors the centre. In addition, a Lidl supermarket is located to the west of the Penny Hill Centre, still within the defined town centre.

Comparison goods and retail services are provided by a mix of local, regional and national occupiers, including Yorkshire Bank, Halifax Bank, a Post Office and William Hill. The centre also benefits from a health centre and library.

Environmental Quality

The majority of retail units within the defined town centre are situated within the Penny Hill centre which is a covered centre providing a pleasant shopping experience. On the southern side of the centre fronting Church Street there are additional retail units creating an active frontage on Church Street.

Church Street is a busy road, although the active frontages and the open space surrounding St Mary's Church, enhance the environment.

The environment on the Oval is considered to be poor with car park areas to the east of the Oval and a vacant property and Lidl supermarket set back from the road to the west. However, frontage planting along the boundary helps to improve the environment.

Pedestrian Activity

Pedestrian activity within the centre is high, although this is mainly concentrated within the Penny Hill centre and across/around Church Street. Low levels of

pedestrian movement were recorded between the Penny Hill centre and the Lidl supermarket.

Accessibility (Transport)

Traffic within the centre along the Oval and Church Street is high due to these being main arterial routes in the area. Bus routes are provided along Church Street with bus stops located directly outside the Penny Hill centre entrance and the Lidl supermarket.

Car Parking

Car parking in the centre is good with a dedicated car park serving the Penny Hill centre and a separate car park serving the Lidl supermarket.

Surrounding Uses

The surrounding uses are a mix of industrial, office and residential.

Vacancy Levels and Average Rents

Vacancy levels within the centre are low at 5% with only two vacant units within the centre at the time of our visit in October 2010. Average rents are estimated to be £12psf.

Centres Performance/Agents Perception

Yields	9%
Example requirements from retailers	Book Makers, A5 operators, Value retailers
Suitable for modern retailing	Yes
Centre expanding or contracting	Static
Centres performance	Stable
Future of centre	Stable

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Introduction

Kippax is located approximately 12.2 km (7.6 miles) east of Leeds City Centre in Zone 6, Outer East. The town centre is focused around the high street.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	7	10.7	8.9	7.61
Comparison	11	16.9	24.3	29.24
Service	35	53.8	50.6	47.1
Vacant	9	13.8	8.2	10.41
Miscellaneous	3	4.6	7.1	5.64
Total	65	100	100	100

	Sq ft net	%	National Average %
Convenience	26,400	29.6	11.48
Comparison	12,100	13.5	29.44
Service	36,400	40.8	43.6
Vacant	8,200	9.2	8.3
Miscellaneous	6,200	6.9	7.18
Total	89,300	100	100

Source: Experian Goad Centre Category Report 06/08/2010

Retailer Representation and Services

Kippax is a relatively small town centre anchored by a large purpose built Co-Op foodstore. Services within the centre are relatively poor and the centre lacks a bank, although it does include a Post Office and a library, although this is located at the western end away from the main shopping hub around the Co-Op. Comparison goods within the centre are provided by Boots the Chemist and a number of local retailers.

Apart from the purpose built Co-Op with an additional two retail units, the remainder of units within the centre are old and poorly configured.

Environmental Quality

The high street is a relatively quiet road in comparison to other town centre routes, which creates a pleasant shopper environment. However, the primary shopping

frontages within the centre are spread out along the high street with areas of non-retail use which fragments the shopping experience.

The environment is generally good with new footways and -planted baskets along the high street. The area in front of the Co-op provides an area of public realm with benches and other street furniture.

Pedestrian Activity

Pedestrian activity within the centre is relatively low and movement within it is considered to be relatively poor by nature of the fragmented shopping units.

Accessibility (Transport)

Traffic in the centre is relatively low, although there is a bus service on the high street with a stop outside the Co-Op supermarket.

Car Parking

Car parking in the centre is considered to be good. Whilst on-street parking is restricted along the high street, there is a large car park to the rear of the Co-Op foodstore.

Surrounding Uses

Residential development surrounds the town centre, although there are also a number of parks and playing fields within proximity to the town centre.

Vacancy Levels and Average Rents

Following a visit to the centre vacancy levels were estimated by CI to be slightly higher than the Goad figure at approximately 15-20%. Average rents in the centre are estimated to be £10psf.

Centres Performance/Agent Perceptions

Yields	9%
Example requirements from retailers	Local and regional value retailers
Suitable for modern retailing	Yes
Centre expanding or contracting	Contracting
Centres performance	Declining
Future of centre	Contract

APPENDIX 7C: HEALTHCHECKS

Introduction

Kirkstall town centre is located approximately 3.8 km (2.4 miles) north west of Leeds City Centre in Zone 3, Inner North West. The centre comprises purpose built units situated in a retail park.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	3	4.2	8.9	7.61
Comparison	21	29.5	24.3	29.24
Service	15	21.1	50.6	47.1
Vacant	18	25.3	8.2	10.41
Miscellaneous	14	19.7	7.1	5.64
Total	71	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

The large centre comprises a number of large purpose built units. A Morrisons supermarket in the south of the centre acts as anchor and provides the main convenience shopping.

Comparison shopping is provided through a large BHS situated to the north of the centre. There are a handful of small outlets along Commercial Road occupied by local retailers offering comparison goods and a number a takeaways.

The eastern part of the centre comprises a leisure centre and there is a derelict/empty shopping scheme situated on Kirkstall Lane.

Environmental Quality

The centre comprises a handful of small older units and a couple of large purpose built units.

The environmental quality within these larger units is good, however the environment of the centre as a whole is considered to be poor due to its configuration comprising large areas of car parking which fragments the centre and the relationship between units and stores. In addition the vacant retail on Kirkstall Lane detracts from the overall centre environment.

Pedestrian Activity

Pedestrian activity within the centre is considered to be poor with the centre operating as a car destination centre. The busy and complex junctions within the

centre and large areas of car parking act as barriers to increasing pedestrian activity through the centre.

Accessibility (Transport)

Traffic within the centre is high by virtue of the A65 being a major arterial route within Leeds district. Car movement through and within the centre is also considered to be high and there are bus routes along the A65 and B6157 Bridge Road.

Car Parking

Car parking in the centre is very good with a number of off-street car parks associated with the Morrisons and BHS.

Surrounding Uses

Surrounding uses comprise light industrial and residential. The north western edge of the centre adjoins the defined Green Belt within the Leeds UDP.

Vacancy Levels and Average Rents

Vacancy levels are estimated to be high at 20% due to the vacant units on Kirkstall Lane. Average rents in the centre are estimated to be £15psf.

Centres Performance/Agent Perceptions

Yields	7.5%
Example requirements from retailers	Loaf, Hot food
Suitable for modern retailing	Yes
Centre expanding or contracting	Contracting
Centres performance	Improving
Future of centre	Stable/ Right sized

