APPENDIX 7C: HEALTHCHECKS

Introduction

Meanwood is located approximately 3.3 km (2.1 miles) north of Leeds City Centre and lies in Zone 2, Inner North East. The shopping offer is focused around the junction of Stonegate Road and Green Road. Meanwood is a relatively compact town centre comprising a purpose parade on Stonegate Road with additional smaller units along Green Road.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	11	13	8.9	7.61
Comparison	18	21.4	24.3	29.24
Service	42	50	50.6	47.1
Vacant	6	7.1	8.2	10.41
Miscellaneous	7	8.3	7.1	5.64
Total	84	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

The centre is anchored by three convenience stores, a large new Waitrose store located on Green Road, a Netto foodstore also on Green Road and a Aldi located in the North Side Retail Park on Stonegate Road.

A range of comparison goods are provided by national retailers, including Poundstretcher and Pets at Home . Additional comparison goods are provided by independent retailers mainly located on the junction of Green Road and Stonegate Road.

The centre has a range of services including a health centre, a Post Office and bank.

Environmental Quality

The centre comprises a mix of new purpose built units, in addition to smaller older units at the crossroads. Due to these different elements within the centre, the centre has a slightly fragmented feel. The retail park offers a good shopping environment, although as it is stepped back from Stonegate Road and the frontage lacks any activity.

The older units located around the crossroads comprise a number of takeaways which are shuttered during the day and detracts from the environment. The parade of shops on Green Road provides a good shopping environment with an area of public realm in front of these shops and a small amount of planting.

Across the road from this is the new Waitrose store which now acts as a focal point to the centre, the new design with undercroft car parking provides active frontages along Green Road and enhances this part of the centre.

A couple of bars/restaurants located on Meeanwood Road/Stonegate Road provide additional activity to the frontage.

Pedestrian Activity

Pedestrian activity within the centre is considered to be good with movement around and across Green Road particularly high. It is questionable whether pedestrian movement extends from the Waitrose store up to the North Side Retail Park.

Accessibility (Transport)

Traffic within the centre is high by virtue of the main roads running through it and it is likely that the new Waitrose store will have increased traffic movements within the centre. A bus service runs along both Stonegate Road and Green Road.

Car Parking

Car parking in the centre is considered to be good with on-street car parking available on Green Road in front of the Netto foodstore and with dedicated car parking provided in front of the North Side Retail Park and within the Waitrose.

Surrounding Uses

Surrounding uses are residential with Meanwood Park located to the west and north west of the town centre.

Vacancy Levels and Average Rents

Following a site visit, vacancy levels are estimated to be low at approximately~~,~~ 5%. Average rents in the centre are estimated to be approximately £17psf.

Centres Performance/Agent Perceptions

Yields	**7.5%**
Example requirements from retailers	**Good local and regional retailers including Sainsbury’s**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Static**
Centres performance	**Improving**
Future of centre	**Expanding**

APPENDIX 7C: HEALTHCHECKS

Introduction

Middleton Ring Road centre is located approximately 5.8 km (3.6 miles south of Leeds City Centre in Zone 4, Inner South. The centre comprises a purpose built retail park.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	3	21.4	8.9	7.61
Comparison	5	35.7	24.3	29.24
Service	5	35.7	50.6	47.1
Vacant	1	7.1	8.2	10.41
Miscellaneous	0	0	7.1	5.64
Total	**14**	**100**	**100**	**100**

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

Middleton is a relatively small district centre comprising a purpose built retail park which is anchored by Iceland providing a limited convenience offer. The Somerfield that was here was closed and the unit is now occupied by B&M Bargains.

Comparison goods are provided by a mix of regional and local occupiers, including Wynsors Shoes, B&M Bargains and a household discount shop. The St Georges centre provides a range of services including a library, health , housing and other social services. The centre lacks retail services such as banks.

Environmental Quality

The centre comprises a purpose built district centre which is now considered to be outdated and in poor condition. The compact nature of the centre provides a simple shopping experience. The car parking to the front of the units is in poor condition which further detracts from the environmental quality of the centre.

Pedestrian Activity

Pedestrian activity within the centre is relatively high, although it is considered that most of this activity comes from shoppers using the car park as opposed to pedestrian visiting the centre from the wider residential areas.

Accessibility (Transport)

The centre is located off Middleton Ring Road with cars exiting the Ring Road via the roundabout and entering the shopping centre.

Bus routes run long the Ring Road with a bus stop located just outside the district centre.

Car Parking

Car parking in the centre is good with off-street car parking available directly in front of the retail units.

Surrounding Uses

Surrounding uses are residential with old industrial areas to the east on sites which are currently the subject of applications for new convenience stores.

Vacancy Levels and Average Rents

Vacant units were recorded during a site visit and are estimated at approximately 10% with average rents in the centre are considered to be low at £7psf.

Centres Performance/Agent Perceptions

Yields	**11%**
Example requirements from retailers	**Local only**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Contracting**
Centres performance	**Stable**
Future of centre	**Contract**

APPENDIX 7C: HEALTHCHECKS

Introduction

Moor Allerton is located approximately 5.6 km (3.5 miles) north of Leeds City Centre in Zone 7, Outer North East and comprises a retail park on the northern edge of the Ring Road.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	1	8.3	8.9	7.61
Comparison	4	33.3	24.3	29.24
Service	6	50	50.6	47.1
Vacant	1	8.3	8.2	10.41
Miscellaneous	0	0	7.1	5.64
Total	12	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

Moor Allerton comprises a limited number but generally large modern units anchored by a large Sainsburys. Other national occupiers provide comparison goods and include Blockbuster, Thomas Cook, Comet and Homebase.

Services within the centre are limited, but include a library, dentist and cash points

Environmental Quality

The centre comprises relatively new purpose built retail units which are served by large car parking areas to the front. The shopping environment within the retail units and within the small parade of units to the east of the centre is reasonable. However, across the town centre as a whole, it is considered that the environment is relatively poor due to the large expanses of car parking.

Pedestrian Activity

Pedestrian activity is considered to be relatively low, particularly movement within the centre between the units in the west and units in the east as a result of the large areas of car parking separating the two.

Accessibility (Transport)

Traffic within the centre is relatively low as the centre comprises by it nature a car park with no through routes. The centre is accessible by car and also accessible by public transport with bus stops located within the centre and on the Ring Road.

Car Parking

Car parking is considered to be very good with off-street parking available to the front of the retail units.

Surrounding Uses

Surrounding uses are residential.

Vacancy Levels and Average Rents

Following a site visit in October 2010, four units were believed to be vacant suggesting higher vacancy levels, approximately 35% compared to those recorded in the table above (8%). Average rents are estimated to be £20psf.

Centres Performance/Agent Perceptions

Yields	**7%**
Example requirements from retailers	**KFC**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Contracting**
Centres performance	**Stable**
Future of centre	**Contract**

APPENDIX 7C: HEALTHCHECKS

Introduction

Moortown Corner is located approximately 5.6 km (3.5 miles) north of Leeds City Centre in Zone 2, Inner North East. The centre comprises a relatively small area along Harrogate Road. The retail units are mainly located on the east side of Harrogate Road, although the M&S is located on the west side and there is a small parade of shops on the west side south of Street Lane. It is a centre that the CSPA suggests as appropriate for town centre designation.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	4	9.5	8.9	7.61
Comparison	4	9.5	24.3	29.24
Service	31	73.8	50.6	47.1
Vacant	3	7.1	8.2	10.41
Miscellaneous	0	0	7.1	5.64
Total	42	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

Moortown Corner is a relatively small centre anchored by the M&S Simply Food. Convenience goods are provided by the M&S in addition to an independent green grocers and deli.

Comparison goods are provided by national charity shops, including Oxfam and Cancer Research. There are a number of retail services within the centre, including banks, estate agents and dry cleaners, a pharmacy although the centre lacks a library or community facility.

Environmental Quality

The centre has a pleasant environment the majority of shopping located on one side of Harrogate Road with the shopping parade set back from the roadside creating wider pavement and parking.

Pedestrian Activity

Pedestrian activity is considered average along the parade on Harrogate Road. Movement within the centre between the Harrogate Road parade and M&S Simply Food is considered to be restricted as a result of the main junction which acts as a barrier.

Accessibility (Transport)

Traffic in the centre is high along Harrogate Road although the one way route and dedicated parking in front of the parade of shops reduces the impact of the busy road on the shopper. Bus stops are located along Harrogate Road which provide good accessibility by public transport.

Car Parking

Car parking is considered to be good with dedicated off-street parking areas to the front of the shopping parade on Harrogate Road and also the dedicated car park associated with the M&S Simply Food.

Surrounding Uses

The centre is surrounded by relatively low density housing and there is an area of greenspace to the noreth east.

Vacancy Levels and Average Rents

Vacancy levels in the centre are estimated at approximately 10% with average rents estimated to be £22psf.

Shoppers Survey

A survey of 100 shoppers in Moortown Town Centre was carried out in Summer 2010. When asked what their main reasons for visiting the centre, 43% of respondents stated they were shopping for goods and 31% stated they were paying bills/visiting the services.

With regard to comparison goods, 76% identified Leeds City Centre as their main centre for non-bulky or food shopping, 3% of respondents said they carried out this type of shopping within Moortown and 5% stated that they visited White Rose Centre.

The shopping pattern for bulky goods was similar with 24% stating that Leeds City Centre was their main centre, 5% stating White Rose Centre, 3% stating that they carried out bulky goods shopping in Moortown and 11% stating they visited Crown Point Retail Park.

The average spend of shoppers surveyed is estimated at £10.49 which is slightly lower than some of the other centres although the small survey size and conclusion that 31% of these questioned visited financial services accounts for this lower average spend.

The survey identified that the majority of shoppers visit Moortown from home and that the majority, 52%, travel by car. A relatively high number, 38%, walked to the centre and travel by public transport is very low at 5%.

When asked to describe the centre, the majority of respondents, 81% stated that it was about right and that the layout was also satisfactory. When asked which shops in the centre were most important, 45% of respondents stated that financial institutions were the most important followed by M&S (38%), and 19% considered that the newsagents was the most important shop.

When asked which facilities in the centre could be improved, the majority stated better parking facilities followed by a wider choice of shops.

Business Survey

A business survey was carried out of the existing businesses in Moortown Corner in Summer 2010. Of the existing businesses surveyed, eight returned completed questionnaires, a mixture of national, regional and independent businesses. The businesses that had been operating from the centre for over a year stated that on average turnover and profitability had reduced by approximately 6%. The majority of businesses considered that their current turnover would remain static in the next 12 months, although a relatively large percentage, 25%, considered that this would increase.
When asked to consider Moortown Corner in shopping terms, the majority of businesses surveyed considered that the shopping offer provided was not acceptable, although 25% considered it was too down market.

When asked to rate the centre against a number of criteria, retailers identified a number of issues including very poor parking within the centre and poor traffic congestion. Public transport and pedestrian access was considered to be quite good, along with the range and quality of goods available. The results on the general character and appearance of the centre were inconclusive with the majority of people stating no comment.

When asked to consider potential improvements to the centre in the future, businesses identified improving car parking, increasing the range of local speciality retailers and reducing traffic congestion as the main factor.

Centres Performance/Agent Perceptions

Yields	**6.5%**
Example requirements from retailers	**Good local and some national retailers, e.g. Subway**
Suitable for modern retailing	**No**
Centre expanding or contracting	**Contracting**
Centres performance	**stable**
Future of centre	**Right Size**

APPENDIX 7C: HEALTHCHECKS

Introduction

Morley is located approximately 7.2 km (4.5 miles) south west of Leeds City Centre in Zone 9, Outer South, with the main shopping located along Queen Street.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	12	4.96	8.9	7.61
Comparison	45	18.6	24.3	29.24
Service	144	59.5	50.6	46.95
Vacant	34	14	8.2	10.41
Miscellaneous	7	2.9	7.1	5.64
Total	242	100	100	100

	Sq ft net	%	National Average %
Convenience	62,500	13.9	11.48
Comparison	129,800	28.8	29.44
Service	210,200	46.7	43.6
Vacant	37,600	8.4	8.3
Miscellaneous	10,000	2.2	7.18
Total	45,0100	100	100

Source: Experian Goad Centre Category Report 11/08/2010

Retailer Representation and Services

For such a large centre, the retailer representation is relatively poor. The centre is anchored by a large Morrisons store set back from Queen Street behind the Town Hall. The remainder of the centre comprises small poorly configured units in the ground floor of traditional buildings.
Comparison goods are provided by value/ discount operators including B&M, Wilkinsons, Boots, Superdrug, Home Bargains and Clinton Cards these are located within the central part of the town off Queen Street.

The southern end of the town, below Fountain Street is dominated by takeaway food outlets and bars. The northern end of the town above Queens Promenade has a relatively poor retail offer with a number of vacant units.

The town contains a number of services, including a library and town hall and is supported by a number of retail services including banks and estate agents. A large new sports centre lies adjacent to the north of the Morrisons store off Queens Promenade.

Environmental Quality

The environmental quality of the centre is good by virtue of large parts of the centre being pedestrianised on Queen Street and other parts of Queen Street being subject to one way traffic and a number of other restricted areas and routes.

In addition, much has been done to improve the environment with attractive street furniture and planting, particularly along the pedestrianised part of Queen Street and outside the Town Hall.

Pedestrian Activity

Pedestrian activity in the central part of the centre is relatively high, although levels decline towards the north and southern extremities of the centre. This is due to the nature of the retail offer in these parts of the centre.

Accessibility (Transport)

Traffic within the centre is relatively low due to the restricted routes within it. By virtue of improving the environment through these restrictive routes, general accessibility to the centre is therefore restricted.

Buses run along Queen Street and Fountain Street to the south.

Car Parking

Car parking in the centre is considered to be good with a large car park serving Morrisons, which therefore serves the wider town centre. There is also an off-street car park situated off Fountain Street in the south of the centre. There is a lack of car parking in the northern end of the centre.

Surrounding Uses

The town centre is surrounded by a mix of uses, including industrial, residential and areas of open space.

Vacancy Levels and Average rents

Following a visit to the town in October 2010 vacancy levels were estimated to be higher than those recorded above at approximately 25%. As discussed previously, the figure of 25% here is an estimate of the vacancy levels in the centre and the higher figure is likely to be accounted for by many of the vacant properties clustered in the Queen Street and Fountain Street area which results in a perception of higher vacancy levels. Average rents in the centre are estimated to be £13psf.

Shoppers Survey

A shopper survey of 100 respondents was carried out in Morley town centre in Summer 2010.

When asked what the main reason for visiting the centre was, the majority (48%) of respondents stated they were shopping for goods, 61% of respondents purchased food to take home, 21% purchased catering services such as hot food takeaway and 17% of respondents stated financial services had been used. Average spend of the respondents surveyed was £24.69 based on all goods in the centre

With regard to comparison goods, 53% of respondents identified the White Rose Centre as their main centre for non-bulky non-food shopping, 25% stated that Leeds City Centre and only 5% stated Morley was their main centre for comparison goods. With regard to bulky goods, 43% of respondents stated Birstall Retail Park at Junction 27 was the main centre with only a small percentage of respondents stating that other centres were used for this purpose.

The majority of shoppers visit Morley town centre from home with 35% of respondents walking to the centre, 25% travelling by car and a high percentage, 25% visiting the centre by public transport.

When asked to describe the centre, shoppers stated that Morley was too small with too many independent shops and not enough large multiple stores. 32% stated that the centre was about right and large majority, 92% stated that the layout of the centre was acceptable.

The supermarket and Wilkinsons were identified as being the most important shops in the centre, a wider choice of shops, better toilets and better quality store and better cleanliness were identified as areas where Morley could be improved.

Business Survey

A business survey was carried out in Morley town centre in Summer 2010 of existing businesses, of those questioned, 21 businesses returned completed questionnaires, 90% of which were small independent businesses. Of those businesses that had been operating from Morley town centre for over a year, on average the sales turnover and profitability have decreased. Of all the businesses questioned, the majority considered that sales turnover would remain static over the next 12 months and they would seek to increases the sales density psf in the future.

Commenting on the centre as a whole, the majority of respondents considered that the centre's market position was good, although 33% considered that Morley was too down market. When asked to comments on a number of factors to rate the centre 40% of respondents considered that the availability of parking was good or very good. Traffic congestion, public transport and pedestrian access were all considered to be good or very good.

Opinions on the range and quality of goods available in Morley varies with up to 24% considering the quality of goods was very good compared to 14% considering it was quite poor. The majority of respondents stated that the character and appearance of Morley was good or very good.

When asked to consider the performance of the town centre over the past five years, the majority of respondents considered that it had got a little worse and the majority considered that the present number of vacant units was unacceptable.
In considering the future of Morley town centre, the 71% of respondents considered that additional retail floorspace would benefit the centre and that Morley should seek to improve the quality and range of shops and retailers in the future.

Centres Performance/Agent Perceptions

Yields	**9%**
Example requirements from retailers	**Subway, Greggs**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Contracting**
Centres performance	**Declining**
Future of centre	**Right size/ contract**

APPENDIX 7C: HEALTHCHECKS

Introduction

Oakwood town centre is located approximately 4 km (2.5 miles) north of Leeds City Centre in Zone 2, Inner North East. The prime shopping street is Roundhay Road.

Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	4	6.8	8.9	7.61
Comparison	18	30.5	24.3	29.24
Service	30	50.8	50.6	47.1
Vacant	4	6.8	8.2	10.41
Miscellaneous	3	5	7.1	5.64
Total	59	100	100	100

Source: Leeds City Council Data, Centre Surveys 2010

Retailer Representation and Services

This is a relatively large centre comprising a mixture of smaller units to the north and two large retail units to the south. The centre is anchored by a large Tesco store in the south of the centre, albeit this is not well integrated with the main part of the centre, and a small Somerfield store supported by a number of other units to the north. These two units provide the convenience offer within the centre, although it is noted that the Tesco store is likely to have a much wider catchment than the Somerfield store.

The second large stand alone retail unit to the south of the centre is occupied by Homebase and provides comparison and bulky goods to shoppers, additional comparison goods are provided by independent retailers in the northern part of the centre. There is a proposal to redevelop the Tesco/Homebase site to provide a larger Tesco store and this could improve integration and consolidate the centre. In addition to this, a national bulky goods operator, Bath Store, is located in the northern part of the centre.

Services in the centre include banks and a Post Office and the centre also provides a number of bars, restaurants and delis.

Environmental Quality

The centre comprises a mix of retailing and retail units and is therefore characterised by two distinct environments. The southern part of the centre is occupied by a large Tesco foodstore and a stand alone Homebase store, both units are set back from Roundhay Road and are served by large car parks. The environment therefore in this area is considered to be relatively poor, dominated by the car.

To the north of these units is a more traditional district centre which comprises some purpose built units and other units which have been converted over time. Shopping is restricted to the western side of Roundhay Road initially with Gipton Wood to the east of Roundhay Road. The environment in this area is considered to be average with the linear form on this area detracting from the shopping experience. The area from the Somerfield supermarket north is considered to be the hub of the district centre with shopping on both sides of the road and a pedestrian crossing with improved pavement areas provided.

Whilst Roundhay Road is a busy road, the wide pavements enhance the environment and enable a number of the bars and restaurants to provide outdoor seating which adds to the vibrancy of the centre.

Pedestrian Activity

Pedestrian activity in the centre is high, although movement between the hub of the centre at the north and the large new units to the south is considered to be relatively poor by virtue of the linear centre and natural topography.

Accessibility (Transport)

Roundhay Road is a busy arterial route within Leeds, providing good access to the district centre. A regular bus route provides access to Leeds City Centre and the wider area.

Car Parking

Car parking in the centre is considered to be good with on street parking available on Roundhay Road in designated parking bays and a large car park located to the rear of the Somerfield supermarket. In addition, there are large car parks serving the Tesco foodstore and the Homebase.

Surrounding Uses

The centre is surrounded by a mix of residential properties with Gipton Wood to the east of the centre.

Vacancy Levels and Average Rents

Vacancy levels in the centre are low at 5% and average rents are estimated to be £20psf.

Centres Performance/Agent Perceptions

Yields	**7%**
Example requirements from retailers	**Estate Agents, Local Fashion, Restaurants**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Static**
Centres performance	**Stable**
Future of centre	**Right Sized**

APPENDIX 7C: HEALTHCHECKS

Introduction

Otley is a large market town located approximately 15.2 km (9.4 miles) north west of Leeds City Centre in Zone 8, Outer North West. The prime shopping streets are Market Street and Kirkgate.

Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	27	9.6	8.9	7.61
Comparison	100	29.5	24.3	29.24
Service	150	44.2	50.6	47.1
Vacant	36	10.6	8.2	10.41
Miscellaneous	26	7.7	7.1	5.64
Total	339	100	100	100

	Sq ft net	%	National Average %
Convenience	108,500	21.2	11.48
Comparison	119,000	23.2	29.44
Service	203,700	39.8	43.6
Vacant	26,100	5.1	8.3
Miscellaneous	54,800	10.7	7.18
Total	512,100	100	100

Source: Experian Goad Centre Category Report 24/03/2009

Retailer Representation and Services

Otley has three main foodstores which provide significant anchors, these being Waitrose (edge of centre),more recent J Sainsburys on the edge of the defined centre and a Netto foodstore at the edge of the centre. Within the centre is a reasonable range of comparison goods outlets, including a Boots, Ben & Co and Greggs.

There are a significant number of charity shops, together with a number of local multiples and independent stores. The markets held in Market Square and on nearby streets in varying forms on Tuesday, Friday and Saturday are also a significant draw to the town.

The town centre has a good range of financial services and also contains a library and other relevant services, with Otley Court House providing facilities for small scale film, theatre, music, dance and related activities.

Environmental Quality

Otley is an attractive and busy town centre focused around the traditional market place. The Marcket Place and Market Street have recently been upgraded with new paving. The main shopping areas are focused around the market place which has radiated and grown out over time. The historic road layout of Otley is now often congested with traffic which creates a noisy environment for all shoppers. Coupled with narrow pavements, it could be considered that the overall effect is a busy a vibrant market town.

Pedestrian Activity

Pedestrian activity in the centre is high, with movement throughout it considered good, although movement through the outer parts of the existing town centre boundaries is considered to be less.

Accessibility (Transport)

Otley is now largelya satellite commuter town for Leeds City Centre and a number of busy arterial routes run through it. The historic town layout results was not designed for the high levels of traffic, resulting in congestion within the town.
The town is served by a number of good bus routes provide access to the wider area including Menston station and Leeds City Centre.

Car Parking

Car parking within the centre is limited due to the nature of the busy roads and high density development of the existing primary retail units. However, on the outer parts of the defined centre, there are a number of car parks associated with employment uses and services and larger foodstores.

Surrounding Uses

The centre is surrounded by a mix of residential and industrial uses.

Vacancy Levels and Average Rents

Vacancy levels in the centre are considered to be average with average rents at £20psf.

Shopper Survey

A shopper survey of 100 shoppers was carried out in Otley town centre in Summer 2010. The majority of respondents (66%) stated that the main reason for visiting the centre was to shop for goods, 10% of respondents stated that they worked in the centre.

When asked what items had been purchased, the majority (51%) stated that they had bought food to take home, relatively high percentages also bought clothing and leisure goods, 15% and 13% respectively. Average spend is estimated at £18.17 based on the responses to the survey.

When asked which centre was their main centre for comparison shopping, non-bulky, non-food, 42% of respondents that they go to Leeds City Centre. A relatively high

percentage 19% identified Otley as their main centre and 12% identified Harrogate as being their main centre for this type of shopping.
With regard to bulky goods, 43% identified Leeds City Centre as the main centre for these goods, with only small percentages going elsewhere.

90% of respondents visited Otley town centre from home although only 25% walked all the way and 61% drove. The centre attracted a relatively high percentage of visitors travelling by public transport, 12%.

When asked to describe Otley town centre, the majority of respondents, 71% considered the shopping and layout of the centre was acceptable. The most important shops were identified as the specialist food shops, chemist and supermarket.

When asked how the town centre could be improved, the majority of respondents stated that Otley would benefit from a wider choice and variety of shops and better quality stores. Other areas for improvement identified were better toilet provision, cleaner air/less traffic pollution and less traffic congestion and more leisure facilities.

Business Survey

A survey of businesses was carried out in Otley town centre in September 2010, 72 completed questionnaires were achieved, the majority of which were from independent businesses under 500 sq ft. The majority of businesses 39% considered that the sales area would increase over the next 12 months with 37% stating it was likely to remain static. In shopping terms, a small majority, 47% considered that Otley was too down market, although 45% considered that it was satisfactory.

In rating the centre against a number of factors, the survey achieved mixed opinion on the availability of parking, with 25% considering it was quite good compared to 24% considering it was very poor. Traffic congestion within the town was considered to be relatively poor but public transport and pedestrian access was considered to be quite good.

The range and quality of goods available are considered to be good or quite good. With regard to the general shopping environment and character of the area, the responses were mixed with similar proportions of respondents stating that this was quite poor, neither good not poor or quite good.

When asked to compare the centre to five years ago, approximately 40% of respondents considered this had got worse. Opinion was split on the number of vacant units with only a small majority, 51% stating that this was not acceptable.

When asked to comment on how the centre should improve in the future, again opinion was split as to whether additional retail floorspace should be provided to enable new retailers/businesses to locate in the centre. Increasing the range of local businesses, improving the appearance of the centre and providing cheaper/free parking in the centre were suggested as ways to improve the centre in the future.

Centres Performance/Agent Perceptions

Yields	**7%**
Example requirements from retailers	**Costa Coffee and good locals**
Suitable for modern retailing	**Yes**
Centre expanding or contracting	**Expanding**
Centres performance	**Stable**
Future of centre	**Expand**