THE LEEDS CITY CENTRE AUDIT - 2001 REVIEW

INTRODUCTION

The importance of the City Centre to the economic and social well being of Leeds, and the continuous need to strengthen its attractiveness in the face of threats from competing centres, has been recognised by the City Council and partner organisations in Leeds for some considerable time. The former Department of the Environment in its planning guidance also placed greater emphasis on town centres. Its Revised PPG6 (Town Centres and Retail Developments) published in June 1996, opened by setting out the then Government's objectives, the first of which was:

"to sustain and enhance the vitality and viability of town centres...".

PPG 6 advises local authorities that they should use certain indicators to provide regular information on the vitality of town centres, and to assess the likely impact of out-of-centre developments. The British Council of Shopping Centres in a research report (Town centre futures: the long-term impact of new developments, November 1996) also calls for regular, rather than one-off, town-centre checks, in order that early, helpful action can be taken. It also says that regular checks could be used to promote the centre to investors and the public.

This shortened audit uses a sub set of the indicator headings used in the first three full audits, to provide current and historical data where available. The focus of the indicators is largely on outcomes (e.g. how many people are using the centre), rather than inputs (e.g. how much money is being spent on transport and environmental schemes). The indicators used for this audit are:

- **Pedestrian flow**
- **Retail yields**
- **Development value**
- **Housing**
- **Leisure**
- **Community safety**
- **Air quality**

In addition to the 7 objective indicators, extensive Market Research was undertaken during the period October 2000 through April 2001 in order to assess user satisfaction and non-user views of the City Centre. A summary of the main findings of this research is included in this shortened audit and the results compared with a benchmark study conducted in 1997.

KEY FINDINGS AND CONCLUSIONS

The boundary of the City Centre for this shortened Audit is the Unitary Development Plan (UDP) definition. Over 116,000 people are estimated to work in this area. Around 4,600 people also live here. Whilst the focus of some of the key indicators is the Prime Shopping Quarter (PSQ), others have a wider scope that recognises the multi-functional role of the City Centre.

Gaps exist in some of the data and the relatively short time series for some indicators makes drawing firm conclusions about the overall health of the City Centre in 2001 a tentative exercise, although some key themes are evident.

- The pedestrian flow data using a revised methodology indicates similar levels of footfall as experienced in 2000. There appears to be an increase in footfall at the weekend at the expense of weekdays – but it is too early to determine whether this is a trend. The picture should become clearer as the time series based on the revised methodology increases.

- Yield data indicates that City Centre retail property performance has held up over the last year and its regional role is continuing to make it an attractive location for institutional investors. There has been a small increase in yield levels probably reflecting a slight increase in the supply of new retail units brought about by the near completion of schemes such as "The Light". Manchester continues to outperform Leeds on this measure, as regeneration activity replacing retail infrastructure destroyed in the terrorist attack comes on stream. Some neighbouring centres, including Bradford, are not performing as well on this measure and appear to be experiencing declining investor confidence.

- Development value figures for completed buildings indicate a considerable rise in the value of office completions in 2000/2001 compared with the previous year, which had seen a comparatively low level of development activity. This recovery in the amount of office development is welcome as at the time of the last full Audit concern was growing about the low level of activity. The residential and other category also showed a marked increase in activity with the value of development being twice that (in real terms) of the previous peak in 1994/95. Overall, total investment is up 88% in real terms on the 1992 levels and only investment in the shopping category is not presently running above the levels experienced in the mid 1990's.

- Residential developments are continuing with considerable private sector interest in creating new housing throughout the City Centre. Over 500 dwellings were completed during 2000/01 and an assessment of construction activity suggests that this rate of completions will continue through 2002 and into 2003. Beyond this there are still some very large opportunities available with planning permission.

- The investment boom in café bars, restaurants, clubs and public houses is continuing although there are signs that this may be at the expense of more established leisure activities such as bowling and cinema provision.

- Crime figures are very disappointing with the trend of increasing numbers of recorded crimes, reported in the last full Audit, continuing and apparently accelerating. The total number of crimes reported in the City Centre in 2000/2001 stood at 13,391 a 20.4% increase on the 1999/2000 total. This compares unfavourably with Leeds as a whole, which saw a rise of just 2.4% over the same period.

- Air quality figures are encouraging in that the long-term trend is now clearly showing generally declining levels of pollutants.

- The findings of the user/non-user market research are generally positive and compare favourably with those of the 1997 benchmark study. Many respondents could see some improvements in the City Centre over the last 2/3 years, which is encouraging. Overall the picture described by the research is of a City Centre that the majority of users rate highly and that is even rated highly by those who more often than not chose to use another centre. People like the feel of Leeds and are increasingly describing an image of sophistication that they feel the City Centre is exhibiting. Many users' enthusiasm for the City Centre allows them to "forgive" minor irritations or rationalise them away as "big city" problems that cannot be escaped from.

- Overall, most of the objective indicators and the Market Research activity suggest that since the last full Audit the City Centre's vitality has been generally sustained and that many aspects of the City Centre's economy are doing better than in the previous year. However, there is also growing concern about the amount of crime being committed in the centre. It is currently increasing at such a rate that if unchecked, it is increasingly likely to have a detrimental effect on the vitality of the City Centre.

Comments and queries arising from this short Audit are welcome and should be addressed initially to:

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PEDESTRIAN FLOW

A key indicator of the general vitality of the City Centre is pedestrian flow, also known as “footfall”. It provides a basic indication of the number of people on the streets and therefore available for businesses to attract. There are a number of methods used to measure footfall, which means that comparing absolute values is of less importance than investigating longer-term trends.

The Department of Highways and Transportation (DoHT) began to carry out annual surveys in Spring 1996. Counts were initially made at 32 locations throughout the Prime Shopping Quarter (PSQ) on a weekday and Saturday (between 0700 and 1900 hours). In addition counts were made at 6 of these locations on a Sunday (between 1000 and 1800 hours).

However, by the time of the 2nd City Centre Audit, it had become apparent that physical changes in the City Centre, resulting from increased pedestrianisation and the closure of some routes to through traffic within and around the PSQ had compromised a number of data collection points. It was, therefore, decided to revise the survey methodology in time for the 2000 survey. The current survey is based on a cordon around the PSQ which should minimise the effects of infrastructure changes and provide more representative figures for the actual volumes of pedestrians.

The locations being surveyed under the new programme are not all directly comparable with those surveyed between 1996 and 1999. However, as part of its ongoing monitoring, and to allow limited comparisons in the next few years the DoHT intends to monitor some of the sites surveyed in the 1996 to 1999 period until trends from the cordon survey are established.

For the purposes of the Audit summary data from both surveys is presented.

DoHT Counts, 1996 - 1999 Programme

Between 1996 and 1999, total weekday numbers were reduced by 6.1%. The Saturday counts also showed a decline of 20.7% over the same period. As previously indicated it was becoming increasingly apparent that the appropriateness of some counting points had been eroded during this period leading to some extremely suspect data being produced, such as that recorded on Briggate, which indicated a 60% decline over this period. If this counting points' data is removed from the overall counts then the weekday figures appeared more stable over the monitored period. The Saturday counts also showed a less significant decline, which was at least partially offset by increased Sunday activity (+16.6% 1997-1999).

DoHT counts, 2000 and 2001 Programme

19 survey points are used on the cordon around the PSQ. All locations were counted on a weekday and Saturday from 0700 to 1900 hours and on Sunday from 1000 to 1800 hours.

The table below summarises the results of the 2000 and 2001 survey.

	Weekday (0700 – 1900 hrs.)	**Saturday (0700 – 1900 hrs.)**	**Sunday (1000 – 1800 hrs)**
Total pedestrian flow 2000	**218,600**	**286,500**	**59,200**
Total pedestrian flow 2001	**209,800**	**296,700**	**59,700**
Change 2000 - 2001	**- 8,800 (-4%)**	**+ 10,200 (+3.6%)**	**+ 500 (+0.8%)**
Source: DoHT October 2001			

Data from the first two years surveys using the revised methodology appear to indicate a small reduction in weekday being more than offset by an increase in footfall at weekends. Whether this is an actual trend or as a result of other factors will only become apparent as a time series develops.

RETAIL YIELDS

Nationally, low interest rates and the continued volatility of the worlds equities market have encouraged continued investment in all property despite the current deepening economic slowdown, the attack on New York and the resultant international events. Property is generally seen as offering good returns on the expectation of high rents coupled with capital growth well above the current level of inflation. Thus, property yields are not necessarily a direct reflection of current activity in the retail industry itself, but take into account future expectations of the ease of letting premises.

In retailing nationally, high levels of consumer spending resulting from relatively high levels of disposable incomes coupled with cheaper borrowing has assured continued prosperity for most retailers, although those who have been slow to adapt to changing public tastes are continuing to have to undertake dramatic rationalisation and market re-orientation.

However, at the time of this audit growing concerns are being raised by, in particular, members of the Bank of England Monetary Committee, about the amount of debt being incurred by consumers. Despite a strong on–going lobby from the manufacturing sector and the range of employers associations many commentators expect interest rates to rise at least once during the 2002 unless there are signs of slowing consumer spending and reducing personal debt.

Prime retail properties remain in demand as a result of relatively limited new developments and constrained supply of the right quality of property in the right location. Consequently national rental levels have grown over the last 12 months, although there has been limited changes to yields. Secondary retail properties are continuing to be fuelled by the activities in the prime market, coupled with the current low interest rates. Gaps in the secondary retail market are being plugged by growth in service sectors, leisure, and catering outlets.

In Leeds, retail yields over the period 1995 through to Spring 1999 had remained stable at around 5%. This pattern changed in Autumn 1999 when they softened to 4.5%. Since then yields have returned to 5% probably reflecting the slight increase in supply of new retail units brought about by the near completion of schemes such as “The Light”. Nevertheless, as a measure of retail viability the long term yield data for Leeds suggests that investors are continuing to take a positive outlook and Leeds continues to be viewed as an attractive investment location with expectations of secure future rental growth. The relatively compact nature of the prime shopping quarter has the effect of maintaining a healthy level of demand for space that is in relatively short supply, despite recent developments.

By comparison Bradford has seen yields increase steadily from 6.0% for the period 1994 to 1997, to 6.5% between 1998 and 1999, rising to 7.0% in 2000 and is now 7.5%. This run of data suggests a far less positive outlook for the future and may reflect concerns amongst investors about recent troubles experienced within a relatively short distance of the City Centre. Other outlying sub-regional centres including Huddersfield, Harrogate and Doncaster have not generally enjoyed stability in recent years with yields higher, possibly reflecting their lower critical mass in terms of catchment area.

Nationally, Leeds has performed in line with other key centres such as London West End, Birmingham, Nottingham, Newcastle, and Liverpool. Manchester, which has seen comprehensive regeneration and redevelopment of the City Centre following the Arndale Centre bombing, out performs all other centres on this measure, possibly reflecting the significant scale of new replacement retail floorspace being delivered.

RETAIL YIELDS 1997 - 2001									
CENTRE	**1/10/97**	**1/4/98**	**1/10/98**	**1/4/99**	**1/10/99**	**1/4/00**	**1/10/00**	**1/4/01**	**1/10/01**
LEEDS	**5.00**	**5.00**	**5.00**	**5.00**	**4.50**	**4.50**	**5.00**	**5.00**	**5.00**
Bradford	6.00	6.50	6.50	6.50	6.50	7.00	7.00	7.00	7.50
Doncaster	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00	6.00
Harrogate	6.50	6.50	6.25	6.25	6.25	6.25	6.25	6.75	6.75
Huddersfield	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00	8.00
Hull	6.50	6.50	6.50	6.50	6.50	6.75	6.75	6.75	6.75
Sheffield	6.00	6.00	6.00	5.75	5.75	5.75	5.75	5.75	5.75
York	4.75	4.75	4.50	5.00	5.00	5.00	5.00	5.00	5.00
Liverpool	5.00	5.00	5.25	5.25	5.25	5.25	5.25	5.25	5.25
Manchester	5.50	5.00	5.00	4.50	4.50	4.25	4.25	4.25	4.25
Newcastle	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75	4.75
Nottingham	5.00	5.00	4.75	4.75	4.75	4.75	4.75	4.75	4.75
Bristol	6.00	6.00	6.00	6.00	5.00	5.00	5.00	5.00	5.00
Birmingham	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00
Cardiff	4.75	5.00	5.00	5.00	5.00	5.00	4.50	4.50	4.50
Meadowhall	4.00	4.00	4.00	4.00	5.00	5.00	5.00	5.00	6.00
Metro Centre	5.25	5.25	5.25	5.25	5.25	5.25	5.25	5.25	6.25
London West End	5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.25	5.25
White Rose	**6.75**	**6.75**	**6.75**	**6.75**	**6.75**	**6.25**	**6.25**	**6.25**	**6.25**
Trafford Centre						5.50	5.50	5.50	5.50
Blue Water					5.00	6.00	6.00	6.00	6.00
Monks Wood		5.00	5.00	5.00	5.00	5.00	5.00	5.00	5.00

Source: Valuation Office, Property Market Report

Note: Yield figures broadly represent the market's evaluation of the investment risk attached to a property –a lower figure indicates greater security.

DEVELOPMENT VALUE

Based on the notional cost of building development started and handled by Building Consultancy in the City Centre, a picture can be assembled of the scale of investment there.

The table below records the notional expenditure in total and in five categories of building type over the years 1992/93 to 2000/2001(rounded to the nearest thousand pounds) where construction had commenced.

Development Value 1992/2001: Year by Building Type						£0,000 Current Prices
Year	**Assembly***	**Industrial**	**Office**	**Shopping**	**Residential ** and other**	**Total**
1992/1993	6,134	4,655	13,234	4,988	2,075	31,085
1993/1994	3,025	1,896	22,934	2,380	1,450	31,694
1994/1995	75,085	1,753	16,320	8,220	6,415	107,793
1995/1996	12,434	4,854	34,728	11,206	2,120	64,501
1996/1997	7,443	9,341	27,474	21,595	609	66,463
1997/1998	7,749	4,619	25,585	20,082	367	58,403
1998/1999	26,539	12,183	31,466	13,592	3,165	86,945
1999/2000	15,608	6,379	15,227	7,443	1,401	46,058
2000/2001	**25,625**	**4,701**	**30,142**	**7,630**	**15,651**	**83,749**
* Includes pubs, clubs, restaurants and similar places of public assembly. ** Includes hospitals, hotels etc.						
Source: Department of Planning and Environment, Leeds City Council						

With the passage of time and with a survey over an extended time period it is likely that some of the apparent growth in expenditure might simply be due to inflation in building costs. The above figures have therefore been reworked taking account of average building costs indexed to the first year of the annual surveys as the base year. The following second table presents the adjusted development value, which allows more sensible comparisons to be made in real terms.

Development Value 1992/2001: Year by Building Type							£0,000 Real Terms
Year	**Assembly***	**Industrial**	**Office**	**Shopping**	**Residential ** and other**	**Total**	**Index**
1992/1993	6,686	5,074	14,425	5,437	2,261	33,883	100
1993/1994	2,951	1,849	22,382	2,322	1,415	30,918	91
1994/1995	70,331	1,642	15,287	7,700	6,009	100,968	298
1995/1996	11,051	4,296	30,134	9,959	1,884	57,324	169
1996/1997	6,458	8,105	23,839	18,738	528	57,669	170
1997/1998	6,549	3,904	21,622	16,971	310	49,356	146
1998/1999	21,615	9,922	25,628	11,070	2,578	70,812	209
1999/2000	12,368	5,055	12,065	5,898	1110	36,496	108
2000/2001	**19,487**	**3,575**	**22,922**	**5,802**	**11,902**	**63,687**	**188**
* Includes pubs, clubs, restaurants and similar places of public assembly. ** Includes hospitals, hotels etc.							
Source: Department of Planning and Environment, Leeds City Council							

Because of the generally large scale of City Centre building projects one individual project can be a significant proportion of investment in a particular category in any one year, and this can lead to a disjointed rather than smooth pattern of overall investment. This is evident in the "Total" investment, and in every category of building type. Although there are no 'smooth' trends of continuously growing investment, generally optimistic observations can be drawn.

With a peaking of investment in the mid 1990's, investment in the "Assembly" category, which includes leisure buildings, like pubs and clubs, has been running at historically high levels for the past three years.

Industrial investment has followed an erratic path, doubling then halving, year on year. But this is not a significant City Centre sector.

Office investment has remained relatively robust with the same level of investment in the first four years of the survey period (£82m) as in the last four. Investment in shopping development peaked in the three years 1996-9 but has more recently fallen back toward the levels achieved in the early 1990's.

The widely cast "Residential and Other" category shows no marked pattern of activity, but significantly in 2000/01, at £11.9m, was twice the previous peak year of 1994/5. This reflects the common knowledge of high levels of activity in housing and hotel building and conversion work in recent times.

Investment in 2000/01 is dominated by the Assembly category, 31% of 'Total' investment, and office building (36%) - both key uses to the success of the City Centre's core functions. There appears to be a lull in major investment in shopping development, only 9% of 'Total' 2000/01 investment, with major proposals at Trinity Street and Union Street not quite at implementation stage.

Overall 'Total' investment is up 88% in real terms on 1992 levels and only investment in shopping of the key City Centre uses is not presently running well above the levels of the early 1990's. This reassuringly ties in with the findings of the West Yorkshire Retail Study, which predicts a stronger demand for shopping floorspace later in the decade.

The record continues to show healthy investment interest in the City Centre in the monitored period.

HOUSING

Population and Communities

With several years of development activity the City Centre is fast becoming an established residential district of Leeds. At the benchmark date of October 2000, it is estimated that the City Centre population had grown to 4600, but continuing development is likely to add to this figure quite quickly. Current indications are that the population could rise to 5800 by April 2003. Accommodation is now available throughout most parts of the City Centre and is set to expand in areas south of the River Aire, centred around Holbeck Urban Village.

Development Activity

Completion figures are available for the last 5 years indicating a considerable growth in numbers during the last year and a half with over 500 dwellings completed during 2000/01 and 60 completed during April – July 2001/02. Assessment of construction activity suggests that this rate of completions will continue for the rest of 2001/02 and through 2002/03. Beyond 2002/03, it is hazardous to make predictions, but there are some very large opportunities available with planning permission, which suggest that the biggest growth will come during the middle years of the decade. But experience of the more mature residential markets of Birmingham and Manchester City Centres suggests that output is likely to settle down at a long-run average of around 270 completions per annum.

Year	Actual	Estimate[1]
1996/97	28	
1997/98	8	
1998/99	81	
1999/00	151	
2000/01	524	
2001/02	64[2]	513
2002/03		393

Significant schemes which have been completed during the last 18 months include over 250 riverside apartments, and developments around Dock Street, Millennium Square and the Office Quarter. Schemes under construction include Whitehall Quays (149) and Wellesley Hotel (67), Park Row (157), Bridge End (97), Dudley House (90), Crispin House (77) and Denison Hall (31). In the future, a number of significant approved schemes may be expected at Whitehall Rd (450 units), Clarence Dock (400), Gotts Road (366), Brewery Wharf (351), Royal Mail House (350), Sweet Street (220) and Bridgewater Place (203), not to mention many smaller schemes.

Prices and Affordability

Prices average around £100,000 to £150,000 for 1 and 2 bedroom flats respectively although prices vary according to size, floor level, prestige of building, location, and views. A car parking space commonly adds £10,000 to the price.

The CASPAR flats at North St have added 45 affordable flats for sub-market rent, and it is anticipated that more affordable dwellings will become available at Boar Lane and in the Exchange Quarter over the next year or so.

[1] Estimates are made purely on dwellings under construction, and are likely to underestimate actual provision particularly in year 2002/03.

[2] Up to 31/7/01

Housing Survey 2000 Results

A survey of City Centre residents was carried out in 2000. Questionnaires were delivered to a broad selection of over 350 dwellings and 120 were returned completed. Of the respondents, over half were between 16 and 35 years old, most were single (57%), and a majority were male (55%). They had previously lived in other parts of Leeds (33%), the rest of West Yorkshire (24%), London (13%), the rest of the UK (26%) and overseas (4%).

Of the factors influencing the choice to live in the City Centre, “lifestyle” and “access to employment” were cited by most residents as the most important. A majority of the respondents anticipate remaining resident in the City Centre for more than 2 years (57%), with only a small proportion staying for less than 6 months (9%).

In terms of the tenancy of respondents, 45% are owner-occupiers, 41% rent privately, 10% are in company lets and 3% in the social sector. The vast majority have their City Centre home as their main residence (77%) with only 21% having it as a second home. Of those who bought their property between January 1999 and June 2000, the average price of a 1 bed flat was £96,000, a 2 bed flat £105,000 and a 3 bed flat £176,000. Service charges vary between £360 and £2000 per annum. Most respondents walk to work (51%) or use public transport (16%) with a minority using their car (30%). Only a tiny proportion (1%) used their bikes. In terms of car ownership 55% of households had the use of one car, 15% 2 or more cars and 30% had no car. This compares with 65% of dwellings having 1 or more car parking spaces.

Residents were asked what factors would attract more people to live in the City Centre. The factors given most weight by respondents were increased affordability of housing followed by improved safety/security and more resident car parking.

LEISURE

The recent investment boom in café bars, restaurants, clubs and public houses has continued apace over the last 12 months and confirms that leisure in the City Centre continues to diversify. However, signs are that this may be expense of more established leisure activities such as bowling and cinema screen provision; while the new Ster Century cinema in The Light has 11 screens this is still far fewer than other comparable major cities. This may be due to the perceived slowing down of the cinema market.

Leisure remains an important component in major mixed-use schemes in the City Centre; evident in current development proposals where pubs, clubs, health and fitness centres and other leisure uses complement residential, office and retail uses. The table below highlights some current major mixed-use schemes.

Granted planning permission	Current planning applications
The Light Whitehall Road Royal Mail House Bridgewater Place Clarence Dock The Cube (Dudley House) Whitehall Road (Yorkshire Electricity Site) Royal Exchange House Brewery Wharf Former Odeon Cinema	Trinity Street Quarter Park Place/King Street Dock Street Cloth Hall Street Union Street/Eastgate Quarter Former ABC Cinema, Vicar Lane

The growth in pubs and café bars within the City Centre is illustrated in the table below. It can be seen that new pubs and bars continue to open in the City Centre with more in the planning pipeline.

Leisure Uses	City Centre[1]
Pubs and Café Bars 1991- 2001	
1991	63
1994	72
2000	132
2001	152
Nightclubs	
1991	13
1996	19
2001	28
Restaurants 1996 - 2001	
1996	55
2000	66
2001	72
Cafés/Snack Bars/Coffee Shops 1996 – 2001	
1996	49
2000[2]	97
2001 including:	91
Cafés	59
Coffee Shops	11
Sandwich Bars	17
Current Planning Permissions 2000 – 2001	
A3[3] permissions	27
A3 applications	8
Nightclub permissions	1
Nightclub applications	5

1 As defined in the Adopted Leeds Unitary Development Plan (2001)

2 The figure for 2000 (in the 1999-2000 City Centre Audit) may have included additional uses such as cafes in other establishments
3 Food and Drink including Bars, Restaurants, Hot Food Takeaways

The patterns of development reported in the last full City Centre Audit are continuing. The Greek Street/Park Row and York Place areas of the Prime Office Quarter and the Exchange Quarter are still the main foci for new bars and restaurants. Elsewhere, new growth has clustered around City Square/City Station.

Within the Prime Office Quarter many of the new bars are taking vacant ground floor space previously occupied by large space office users such as former banking halls. These developments, in supplementing the principal office use, bring extra life into the area, especially at night and help provide further amenities for the office community. There is a spatial concentration of new bars and restaurants in Greek Street/Park Row and York Place.

Within the Exchange Quarter a concentration of small independent bars has developed alongside larger chains; these will complement the growth of new housing development in the area. A Small Independent Bars Association exists to market and provide co-ordinated leisure events in the Exchange Quarter.

The Entertainment Quarter continues to retain and attract leisure uses especially nightclubs. This has been assisted by the redecoration of Grand Arcade.

These developments illustrate the growing diversification and sophistication of the City Centre market. This can be further seen with the establishment of jazz, comedy and adult entertainment venues, and the increasing blurring of distinctions between places primarily serving food with those serving drink. Longer opening hours and a change of emphasis throughout the day within individual bars, illustrate their changing nature and clientele. The mixture of big brewery and pub chain establishments with the large number of independent bars which have emerged assists in creating a City Centre which offers a choice of drinking and eating opportunities.

There has been limited new leisure development in the heart of the Prime Shopping Quarter as ground floor shopping uses continue to trade successfully, and opportunities for new leisure uses are more limited; though there is a scattering of existing pubs, restaurants and cafes there. The consequent low level of night-time activity in the shopping quarter is offset somewhat by its function as a pedestrian route between key leisure areas in the wider City Centre.

Restaurants and Cafes

As the table above shows, the number of restaurants continues to grow significantly. The number of coffee shops, cafes, snack bars and sandwich shops has remained relatively stable. The vibrancy of the streets continues to be enhanced by caterers introducing a pavement component to their establishment. The number of cafes located in shops are increasing and coffee bars are becoming more prevalent in the Prime Shopping Quarter servicing the main shopping area but currently clustering around Albion Place and Albion Street, taking advantage of the wide pedestrian streets there.

Nightclubs

The table shows that nightclub provision has more than doubled in the last decade and there are more in the pipeline. The diversification of leisure has seen the blurring of the nightclub/bar use as many bars apply for entertainment and late night licenses. “Creation”, for example, operates as a café-bar during the day, a bar in the evening, evolving into a nightclub into the night and the early hours. The city centre’s “clubscene” has been extensively featured in the media and attracted clubbers from around the country. The City Council’s Department of Leisure Services is currently successfully promoting clubbing breaks on the internet including hotel accommodation, travel and club packages.

COMMUNITY SAFETY

Annual data on recorded crimes by beat and category of offence have been obtained from West Yorkshire Police for the City Centre, for 1993 - 2000. Due to recent changes in the reporting time scales used by the Police, the latest available data is presented on a financial year basis rather than calendar year. This has produced a slight discontinuity in the overall time series of data and means that caution needs to be exercised when making comparisons between absolute numbers of crimes over the longer term. Nevertheless, trends can still be examined. In addition, as two years worth of data is available using the revised monitoring period accurate short-term comparisons can be made.

Disappointingly, the trend of increasing numbers of recorded crimes, reported in last years audit has continued and appears to be accelerating. The total number of offences recorded in the City Centre in 2000/2001 stood at 13,391, which is 20.4% higher than in 1999/2000. This compares unfavourably with Leeds as a whole, which saw an increase of 2.4% from 103,425 offences in 1999/2000 to 105,882, offences in 2000/2001. The figure for thefts of vehicles shows a reduction for the fifth year in a row, from an annual average of around 2000 between 1993-1995 to less than 500 in 2000/2001. However, the figure for stealing from a vehicle has increased by 41.4% between 1999/2000and 2000/2001. The majority of offences (5,390) in the City Centre in 2000/2001 fall within the category of other theft. As an indication, these offences occur in a public place without the use of or threat of violence and can include thefts of cycles and thefts from the person, for example mobile phones, wallets, etc.

To put this in perspective there are an estimated 50,000 vehicles parked in the City Centre each day and on average there are 8 thefts from a vehicle and one car stolen per day. On average again, there are 3 violent crimes (this includes public order) and one robbery per day.

Currently there are 330 licensed premises within Millgarth Division (an increase of 53% compared to 1994). 84 of these have extended opening hours, whilst in 1994 there were only 33. At present the club capacity in Leeds is 73,000. This in itself can bring problems to the City Centre with increased numbers of people enjoying the facilities. In 2000 the City Centre Policing Team was established to deal with priority issues in the City Centre. The Team’s current priorities relate to the issues of drink and disorder in the evenings.

During 2000 a "Clubwatch" system run by the City Centre Nightclubs Association was launched to counter ‘trouble-makers’ in licensed premises. This scheme follows the good practice adopted by the Leeds Retailers Crime Initiative, reported in the previous Audit, whereby radio links are established between licensed premises and the Police.

Since 1993, as part of the many street enhancements schemes throughout the City Centre, a significant number of street lighting improvements have been made. Over £½ million has been spent on renewing and upgrading street lighting throughout the City Centre, on streets not subject to major environmental enhancements. As well as making the public feel safer, the improved lighting assists with CCTV camera coverage.

Tackling Crime and Disorder

The City Centre can suffer from a range of activities, which may not in themselves be classed as major crime but have a detrimental impact on the image of the city. These include street nuisance, aggressive and intimidating begging, and illegal street trading and general touting. What is important is the public’s perceptions of crime and the fear of crime. This has been highlighted in Market research conducted in late 2000 and early 2001 with users and non-users of the City Centre.

In September 2000, a City Centre community safety conference was held to identify the current issues of concern within the private, public and voluntary sector. The Millgarth Divisional Community Safety Partnership will use the information obtained from this event, along with the recorded crime statistics from the Police, to prioritise areas for action. A dialogue between West Yorkshire Police, the City Council and the private/voluntary sector has been developed and partnership working on tackling crime and disorder will be enhanced through this forum. The Partnership is fully aware that we all have an individual and collective responsibility to address community safety in the City Centre.

The Target Initiative launched by the Police in 2000 is a two-year intelligence led campaign, aimed at reducing crime and disorder across the county, with targeted initiatives at each division. In the first four months of operation, the number of arrests made through Target campaigns reached over 1000 with almost 800 crimes detected. The Target Initiative is targeting the most prolific offenders in West Yorkshire. Whilst Target's arrest initiatives are primarily aimed at tackling crime, they are also intended to address fear of crime. More recently a one-month amnesty of replica firearms has been announced for any such items to be handed in to delegated police stations without fear of prosecution. In the City Centre a number of “High Visibility” events are being planned. Details of what has been achieved in Leeds City Centre will be reported in the next report.

All local authorities now have a statutory duty to mainstream consideration of crime and disorder issues in all its activities. In January 2000, Leeds City Council commenced a Best Value Review of community safety and running concurrently with this, is the review being conducted by the West Yorkshire Police Authority into policing matters in Leeds. A close working relationship has been established with the Police Best Value Review Team, and an overarching joint objective has been agreed:

“Through a review of existing structures, resources, systems, dedicated services and boundaries, West Yorkshire Police Authority, in partnership with Leeds City Council, will seek to improve the performance and effectiveness of their community safety functions, thereby reducing crime, disorder and the fear of crime as measured by the relevant Best Value Performance Indicators”.

This review will have implications as to the future purpose; structure and processes of how community safety is addressed in Leeds and fundamentally will seek to secure service improvements for people who live, work and visit the city.

1993 -1999 Time Series

City Centre Offences (by category)							
Offence	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**
Offences against people	446	466	390	473	476	820	935
Stealing from a vehicle	2,447	1,745	2,116	2,148	2,453	1,803	1,915
Theft of a vehicle	2,263	2,079	2,190	1,191	779	673	524
Stealing from shops	2,019	1,806	1,933	2,251	2,084	2,240	1,754
Other theft/burglary	4,148	4,150	4,389	4,321	4,070	3,681	3,496
Damage	1,084	960	841	878	870	676	856
Other	146	129	131	235	183	513	1,770
Total	**12,553**	**11,335**	**11,990**	**11,497**	**10,915**	**10,406**	**11,250**
Source: West Yorkshire Police.							

1999/2000 - 2000/2001 Time Series

City Centre Offences (by category)		
Offence	**1999/2000**	**2000/2001**
Offences against people	1,274	1,444
Stealing from a vehicle	1,697	2,400
Theft of a vehicle	513	494
Stealing from shops	1,691	1,808
Other theft/burglary	4,016	5,390
Damage	551	661
Other	1,381	1,194
Total	**11,123**	**13,391**
Source: West Yorkshire Police - Millgarth Division.		

AIR QUALITY

Summary of the data

The UK National Air Quality Strategy sets out air quality standards for various pollutants, some of which are monitored at the DETR's City Centre monitoring station at Queen Square Court, off Woodhouse Lane. The Strategy has specific objectives which, depending on the pollutants, have to be met from 2003 to 2005. Officers from the Department of Housing and Environmental Health Services have measured data at the monitoring site from 1993 onwards, for carbon monoxide, nitrogen dioxide, sulphur dioxide, PM_{10} particles and ozone.

Local authorities are required to carry out a review and assessment of air quality in their area. The monitoring at City Centre and other locations is assisting in this on-going process. With the exception of ozone, if the statutory objectives are not likely to be met by the date set in the regulations, air quality management areas have to be designated and action plans prepared to tackle the problems identified.

Leeds has declared Air Quality Management Orders for nitrogen dioxide (identifying residential properties close to the most heavily trafficked roads) and for PM10 particles (in one close-knit residential area not subject to a smoke control order). An action plan is being prepared, indicating the steps the City Council proposes to take in its efforts to achieve the 2005 objectives for these two pollutants.

The results shown in the table indicate a general downward trend for carbon monoxide, nitrogen dioxide, sulphur dioxide and PM_{10} particles. Leeds urban background concentrations of ozone comply with the specific objectives in all but the hottest, sunniest summers.

Sustained reductions in certain pollutants will be needed if the urban background air quality is to meet the UK National Air Quality Strategy objectives throughout the city at the appropriate time:

Nitrogen dioxide levels are decreasing and the most recent review (stage 3) has concluded that the vast majority of the City Centre will comply with the specific objective values. However, a small number of locations have been declared Air Quality Management Areas, as predictions indicate a likelihood that the annual mean nitrogen dioxide objective will be exceeded. The city council already has a well-developed road transport strategy that includes a number of initiatives that are expected to reduce pollution. These will form the basis of the action plan, which is a statutory requirement upon the declaration of air quality management areas.

Sulphur dioxide levels occasionally exceed the short-term (15 minute) standard, although the background concentration is well within the standard. The breaches of the standard are thought to derive from power station emissions beyond the Leeds boundary. However the frequency of theses exceedences has decreased substantially in recent years.

PM_{10} particles consistently failed to meet the original 2005 objective. However, following a national review of the method of measuring and reporting the results, the urban background now achieves the revised objective. The results since 1993 have been re-calculated and are shown in the table that follows. As with nitrogen dioxide, road traffic is a significant source. However, uncontrollable background contributions, which can affect large areas of the country simultaneously, appear to have a greater influence on results.

The National Strategy anticipates air quality improvements to be brought about by fleet renewal, use of cleaner fuels, reducing car dependency and promotion of public transport. In terms of local action, the implementation of the Local Transport Plan, with its encouragement of mode switching from car to public transport, cycle or walking, will be perhaps the major potential influence in the years up to 2005.

Incidence of exceedences and compliance with the specific objective for 2003/2005

POLLUTANT	SPECIFIC OBJECTIVE FOR YEAR 2003/2005	No OF ALLOWED EXCEEDENCES PER YEAR	ACTUAL EXCEEDENCES MEASURED AT LEEDS CENTRE URBAN BACKGROUND SITE AND COMPLIANCE WITH SPECIFIC OBJECTIVE							
			1993		1994		1995		1996	
			Exceedences	Compliance	Exceedences	Compliance	Exceedences	Compliance	Exceedences	Compliance
Carbon Monoxide (CO)	10 ppm as an 8 hr running mean 100% of the time	0	0	Yes	0	Yes	0	Yes	0	Yes
Nitrogen Dioxide (NO2)	105 ppb hourly mean 99.8% of time	18	0	Yes	7	Yes	1	Yes	1	Yes
	21 ppb annual mean 100% of time	0	26ppb	No	28ppb	No	26ppb	No	27ppb	No
Sulphur Dioxide (SO2)	100 ppb as 15 minute mean 99.9% of time	35	99	No	164	No	81	No	34	Yes
PM10 Particles	50 ug.m^{-3} as a 24 hr mean 90% of time	35 (days)	40	No	44	No	38	No	48	No
Ozone (O3)	50ppb as 8 hr running mean 97% of time	10 (days)	2	Yes	3	Yes	12	No	7	Yes

ppm = parts per million
ppb =parts per billion
ug.m^{-3} = micrograms per cubic metre

Source: Department of Housing & Environmental Health Services

POLLUTANT	SPECIFIC OBJECTIVE FOR YEAR 2003/2005	No OF ALLOWED EXCEEDENCES PER YEAR	ACTUAL EXCEEDENCES MEASURED AT LEEDS CENTRE URBAN BACKGROUND SITE AND COMPLIANCE WITH SPECIFIC OBJECTIVE							
			1997		1998		1999		2000	
			Exceedences	Compliance	Exceedences	Compliance	Exceedences	Compliance	Exceedences	Compliance
Carbon Monoxide (CO)	10 ppm as an 8 hr running mean 100% of the time	0	0	Yes	0	Yes	0	Yes	0	Yes
Nitrogen Dioxide (NO2)	105 ppb hourly mean 99.8% of time	18	2	Yes	0	Yes	0	Yes	0	Yes
	21 ppb annual mean 100% of time	0	27ppb	No	24ppb	No	23ppb	No	19ppb	Yes
Sulphur Dioxide (SO2)	100 ppb as 15 minute mean 99.9% of time	35	82	No	31	Yes	16	Yes	4	Yes
PM10 Particles	50ug.m^{-3} as a 24 hr mean 90% of time	35 (days)	51	No	13	Yes	19	Yes	5	Yes
Ozone (O3)	50ppb as 8 hr running mean 97% of time	10 (days)	4	Yes	2	Yes	14	No	3	Yes

ppm = parts per million
ppb =parts per billion
ug.m^{-3} = micrograms per cubic metre

Source: Department of Housing & Environmental Health Services

Details of each pollutant:

Carbon monoxide (CO)
Carbon Monoxide measured at this site has easily complied with the air quality specific objectives for the year 2003 every year since monitoring commenced in 1993. No official DETR trend is available, but the data seem to indicate a small reduction in concentration of this pollutant.

Nitrogen dioxide (NO_2)
The specific objective for this pollutant has two criteria: -
A short-term peak value measured over 1 hour;
A long-term exposure value measured over 1 year.

The peak hourly objective of 105 ppb has only been exceeded on 11 occasions at this site since 1993 (the most recent exceedences occurring for two hours in 1997). Until the year 2000 the annual mean for NO2 was consistently above 21 ppb and although a slight downward trend was present it was uncertain whether the 2005 objective would be met. The annual mean for 2000 decreased to 19 ppb, well below the objective value. It is unclear at present whether this reduction was meteorological conditions aiding good dispersion or a decrease in traffic related emissions caused by changes in the vehicle fleet.

Road transport accounts for some 46% of the total UK emissions of nitrogen oxides, although in urban areas approximately 70% of NO_2 is derived from road transport. The strategy's emphasis for reduction of NO2 is on improving fleet renewal, use of cleaner fuels, reducing car dependency and promotion of public transport.

Sulphur dioxide (SO_2)
Hourly mean values of SO_2 are around 5 ppb so compliance with the 100 ppb standard is not normally a problem. However, in the past Leeds has experienced SO_2 episodes when levels increase above 100 ppb for a few hours. As a consequence of these episodes the monitoring location would have failed to meet the specific objective during 1993, 1994, 1995 and 1997. In 1996, 1998, 1999 and 2000 the site met the objective value. Like previous pollutants there is a downward trend in SO2 concentrations, but the important factor for SO2 will be the frequency of episodes rather than that of background concentrations. The reduction in exceedences during the last three years is encouraging. The exceedences of 100 ppb are believed to have been attributable to power station emissions and the Environment Agency (whose officers regulate their operations) expect compliance with the 2005 objective will be achieved throughout the Leeds district.

PM_{10} particles
PM_{10} particles (particles below 10 micrometres in diameter) were consistently at a concentration failing to meet the specific objective for 2005. However, following a national review of the air quality objectives, the method of calculating and applying a new objective has indicated that the 2005 standard has been achieved for the last three years. The largest single identifiable source of PM_{10} is road transport, although major industrial sites can contribute to the total. Secondary particle formation also appears to have an important influence on background concentrations, with large areas of the country being affected simultaneously. The strategy expects further improvements to be brought about by traffic management, renewal of vehicles and change in fuel.

Ozone O_3
The Ozone concentration measured at the Leeds Urban Background Site has generally met the specific objective. Only during the hot summers of 1995 and 1999 has the objective not been complied with. Indications are that the trend in ozone concentrations is slightly increasing. This may be due to the recent hot sunny summers and slight reductions in nitric oxides, which react with O_3

Market Research Survey 2000/2001

Background and Introduction

To supplement the objective measures of City Centre 'vitality', market research is conducted once every three years. This provides a more subjective view of the centre's performance from users and potential users of the Centre. The results from the 2000/2001 survey have been compared with the results of the first benchmark study conducted in 1997.

Sampling and Methodology

The research was undertaken in two stages, to avoid seasonal bias. The first stage of the research was undertaken during October through December 2000. The second stage commenced in February 2001. In total 2,428 members of the public were interviewed. Qualitative research was also undertaken with certain groups after the quantitative research was completed.

The quantitative research was conducted amongst four sample groups:

- A representative sample of 1,499 residents of Leeds Metropolitan District (MD)
- 323 Leeds City Centre workers
- 308 Visitors to the City Centre (non - residents)
- 298 Non - users (who were resident outside the Leeds MD, but within a pre-defined catchment area)

A tailored version of a structured questionnaire was administered to each sample group. Each questionnaire covered a number of specific issues pertinent to the group being interviewed. All questionnaires, however, contained a number of core themes linked to the centres perceived performance in the areas 'measured' by the 12 objective indicators used in full audits.

The questionnaires were necessarily very similar to those used in the 1997 benchmark survey although a few adjustments were made to slightly reduce their length. This was achieved through a reduction in the number of 'open ended' questions and the inclusion of additional routing to aid interviewer efficiency. Some new questions regarding views and usage of Kirkgate Market and use of the City Centre more generally on Sundays were added to each sample groups' questionnaires.

Main Findings

Frequency and reasons for use – residents
50% of residents visited the City Centre once a week or more. Younger residents were the most frequent visitors. 16% visited 2 to 3 times a month. 20% visited every 1 to 2 months.

In line with the 1997 survey, the primary reason for visiting was for shopping (82%) with a high proportion of residents shopping once a week or more. 43% did not visit for any other reason. Pubs/clubs/bars were the primary reasons for 8% of residents, many of whom were visiting more frequently than in 1997.

The most popular secondary reasons, were either cultural (visiting galleries/ museums/theatres) or for restaurants/cafes and/or pubs/clubs/bars. Visits for 'cultural' activities had increased since the 1997 survey.

Frequency and reasons for use – workers
Nearly two thirds of workers used Leeds City Centre daily for work – a slight decrease on 1997, but there was an increase in the proportion using Leeds for work less often (every other day or 2 to 3 times a week). 86% combined their time in Leeds for work with other activities – primarily shopping but also pubs/clubs/ bars and restaurants/cafes (mainly at lunchtime or early evening).

The majority of workers also use the City Centre when not working – at least once a week, usually at the weekend but also in the afternoon and late evening. This was mainly for shopping but also to visit pubs/clubs/bars and restaurants/cafes. An increase of usage on Sundays was noted (18% to 23% on Sunday daytimes and 7% – 11% on Sunday evenings). Only 6% never visit Leeds for reasons other than work.

Frequency and reasons for use – visitors
The primary reason for the visitors coming to Leeds City Centre was for shopping (77%), with most coming for the day, usually with friends or a partner. Of those visiting for this purpose the majority visited once or twice a year or every few months, but 17% visited once a week or more. There was a slight decrease in frequency of shopping in Leeds City Centre by this group when compared to the 1997 figures.

Using pubs/clubs/bars (9%) and for business reasons (4%) were other primary reasons for visiting the Centre most often. When not shopping visitors were also using pubs/clubs/bars, restaurants/cafes and various cultural facilities.

13% of visitors stayed overnight with 3 out of 4 preferring to stay with friends or relatives. Older, higher income visitors were most likely to choose a City Centre hotel. Overall, the proportion using City Centre accommodation had increased from 11% to 23% since 1997.

Visiting patterns – non users
By the definition of recruitment, non-users were respondents living within a reasonable travelling distance of the City Centre. Additionally, although all had used the City Centre previously, they did not choose to visit it more than once a year.

Significantly in 1997, 11% of the non-user sample actually lived within the Metropolitan District, whilst the 2000/2001 survey did not encounter any non-user residents.

Locations currently visited for shopping (in preference to Leeds) included Bradford, Wakefield, Halifax, Barnsley and Huddersfield, plus the White Rose Centre and Meadowhall. Respondents also used these favoured locations for leisure and entertainment, pubs/clubs/bars and restaurants/cafes.

Positive and Negative features of Leeds City Centre
Respondents were asked to spontaneously give their thoughts on the most positive and most negative features of the City Centre. All comments were ‘top of mind’ and unprompted. In line with the patterns of usage, the greatest proportions of positive comments centred on the ‘mix of shops’ and the ‘location of shops’.

Respondents were also complementary about restaurants, pubs and bars and about the pedestrianisation schemes, the range of activities and the market area. New comments in 2001/2002 described a positive change in the ambience, character and image of the City Centre.

Negativity was limited and fairly low-key. When dislikes were mentioned, respondents spontaneously specified parking availability and cost and issues around congestion – as they did in the 1997 survey. New comment in the 2000/2001 survey included problems with ‘Big Issue’ sellers, and a general lack of law and order (particularly mentioned by residents and workers). Some further public transport issues were raised, particularly in relation to the evening provision and the cost of buses and taxis.

Shopping Patterns
Users were asked about their shopping habits. Amongst all user groups the most popular type of shopping was classified as ‘leisure shopping’ with a high proportion of residents, workers and visitors using Leeds Centre very frequently for this type of shopping. Whilst some workers used Leeds City Centre for grocery shopping, the majority of all sub-groups tended not to do their grocery shopping there. Household items were purchased in Leeds Centre, but on a fairly infrequently basis.

Rating Shopping Facilities (all groups)
Statements were prepared about various aspects of shopping facilities in Leeds City Centre. These were presented to respondents during the interview and respondents were asked to rate each aspect in terms of ‘performance’ (good to poor) and to also rate the ‘importance’ (high to low) of each aspect.

The aspects of shopping facilities rated most highly for 'performance' included the mix of shops, provision of cafes/restaurants/bars, the pedestrianisation schemes and the overall shopping environment. Improvements were noted, on the 1997 scores, for pedestrianisation and cafes/restaurants/bars in particular. Overall, visitors were the most positive.

The areas requiring the greatest attention, where ratings for 'performance' were lowest, were for public conveniences, street entertainment and air quality/pollution. When the importance of facilities was considered, street entertainment was recorded as being less important to respondents than public conveniences and air quality/pollution.

The greatest divergence, therefore, between the scores for 'importance' against 'performance' was for public conveniences. That is they were considered to be one of the most important features of the City Centre but were rated only as poor/very poor. Improvements suggested including increasing the number of public conveniences, as well as improving signposting, supervision and maintenance.

Other aspects highlighted as being important included safety, cleanliness, a well-maintained environment, a good mix of shops and a good overall shopping environment/atmosphere. Emphasis on the importance of pedestrianisation schemes, architecture/buildings and floral decorations had increased since 1997.

Respondents noted that the shopping facilities had improved in the last 2/3years. Responses indicated that the level of improvement was in line with that noted in 1997.

Overall, residents and workers made the greatest demands in terms of improvements. Visitors were slightly less critical. However, all groups agreed on the areas where improvements should be concentrated – provision of public conveniences, safety and general maintenance, cleanliness and air quality/pollution.

Entertainment and Leisure Facilities
Restaurants/cafes and pubs/clubs/bars were the most popular and widely used leisure facilities. Workers used them to the greatest degree and more often than had been recorded in the 1997 survey. The usage of cultural facilities had also increased since 1997.

Respondents generally rated all of the above very positively, mentioning a good selection and variety, easy access and compactness. Most agreed that the provision had improved in the last 2/3 years. The main negative comments indicated dissatisfaction with the level of City Centre cinema provision and a lack of live entertainment.

Transport and Accessibility
Residents, workers and visitors were using public transport quite widely. Additionally, the usage of public transport by workers had increased significantly since 1997 (from 57% to 63%). Non users were less inclined to use public transport, selecting their own transport (car/motorcycle) in preference when using their chosen location for shopping and entertainment/leisure.

Around half of each respondent sub-group rated public transport into Leeds City Centre as 'quite/very good, indicating that their area was covered by a good service. The majority of other responses described the service as 'average', with a small proportion less happy, stating 'quite poor or very poor'.

Reasons given for 'poor' public transport were buses and trains being late, unreliable and generally too infrequent. Visitors particularly noticed problems with trains, possibly a result of the national train problems (post Hatfield disaster) at the time of the fieldwork. Overall, however, the groups agreed that the public transport provision in Leeds had generally improved in the last 2/3 years.

Those respondents travelling into the City Centre by car/motorcycle found accessibility reasonably easy, although more visitors had problems than residents and workers, primarily due to the 'poor road system'. The residents and workers who commented on accessibility problems referred to congestion and parking difficulties. Some of the residents also mentioned the 'one way system', although it appeared that the majority of workers were now quite familiar with the 'Loop'.

Once respondents had accessed the City Centre - the pedestrianisation schemes and ease of moving between shopping areas on foot were rated positively. The provision for disabled access/prams/pushchairs within the City Centre was, however, rated less positively. Respondents also stated that there was also scope for improving signposting within the City Centre.

Competing Centres
Just over half of the workers and residents samples were using other city centres and 'out of town' shopping centres, in addition to Leeds, but this had decreased since the 1997 survey. The White Rose Centre and Meadowhall were used quite widely, although York, Harrogate, Wakefield and Bradford were also mentioned. Reasons for visiting these locations were 'convenience', 'somewhere different', 'wider selection of shops', and for the White Rose Centre and Meadowhall in particular 'cheaper and easier parking' and 'all under one roof'.

Non-users also used similar city centre locations for leisure, entertainment and shopping. The areas most frequently used were Bradford, Wakefield, Barnsley, Huddersfield, Halifax and York. These towns and cities were chosen primarily for reasons of convenience (as they were near home). Parking was also thought to be cheaper and easier by some.

Improvements in the areas of parking and better/cheaper public transport may encourage more non-users to use Leeds. Others requests included a park and ride system, better signposting and ideally for the City Centre to be less busy! These suggestions may also help to increase the number of trips made by 'visitors'.

Other areas and research techniques covered in the 2000/2001 Survey

Kirkgate Market
64% of Leeds residents rated Kirkgate Market positively as a shopping facility – primarily those aged 55+ and those from lower income groups. It was considered to be an important part of the shopping provision, particularly amongst these groups. A proportion of residents and workers were regular market users, however, a higher proportion of all groups never used the market.

Sunday Visits to the City Centre
Workers were the group most likely to come back into Leeds Centre on Sundays. Two thirds of this group said they came back on Sundays. One third of the residents group also said they used Leeds City Centre on Sundays. Shopping was the main reason cited, but pubs, clubs bars and restaurants were also used.

Visitors appeared not to use Leeds City Centre on Sundays.

Qualitative research findings
Qualitative research was undertaken with a range of sample groups: Leeds residents; Bradford residents (non-users); Leeds workers and senior business people. Focus groups and depth interviews were used to gather the feedback.

Overall, the views of all these groups were very positive. The residents, workers and senior business people all used Leeds Centre regularly for many activities and facilities. They particularly enjoyed the shopping facilities, restaurants / bars / cafes, the 'café society' atmosphere and the cultural activities. The 'non users' also had positive opinions of the city, although they preferred to use another city more regularly (Bradford in this case), as they felt more comfortable there. Bradford residents gave the impression that in their opinion Leeds was quite sophisticated in comparison with their home city and so was treated as a 'special occasion' venue.

Awareness of changes within the city over recent years was high. All groups commented that Leeds City Centre had changed a great deal over the last few years and that these changes were all generally positive. The types of changes noted included new buildings, restoration of existing buildings, increased leisure and entertainment facilities (such as bars and restaurants), more high profile shopping opportunities and improvements to the road system (including the City Centre Loop). The senior business people were generally positive, and pleased with their decisions to locate their offices in Leeds City Centre. They commented that Leeds was developing as a high profile centre for finance and IT related businesses and had witnessed the city going from strength to strength. The senior business people, however, were disappointed with the provision and cost of car parking facilities, particularly for their staff and clients (most respondents had their own private spaces). The non-business respondents (residents and non-user groups) also highlighted problems with car parking when using the city for leisure and social activities. Some problems with public transport were highlighted, however, this varied according to method of transport and the area of residence.

There was concern about levels of crime among all groups. The business people were most concerned about car crime. However, all samples mentioned street begging and in particular 'Big Issue' sellers. The overall impression given was that respondents did not feel particularly threatened by such individuals, more that it was the shear numbers begging or selling the 'Big Issue' that was becoming tiresome.

The female residents group expanded further on the issue of the 'lack of public conveniences' in the City Centre. They spontaneously highlighted this as a problem and explained that not only were there too few public conveniences, but those which were available were not very clean nor of a suitable size to take pushchairs into. It seemed that mothers who regularly took their children into the City Centre with them were most unhappy with this lack of provision. They further explained that it was problematic to have to use facilities in stores or shopping centres, particularly when they had their families with them. They indicated that it was rare for toilet facilities to be close to the store entrance (more likely to be on an upper floor in the depths of the store) and that this was not particularly useful when their children suddenly needed to use the facilities!

Non users suggested that they could be encouraged to use Leeds more often if they were reassured of the location of various facilities, if parking was cheaper and more readily available, if the public transport system was more efficient and reliable and they felt a little safer. Many of these requests could also be applied to the current Leeds 'users' (residents and workers). The senior business people recommended that Leeds should be more actively promoted since it has a great deal to offer businesses that may be seeking a new UK location or were considering relocating. Leeds compared positively with many other cities in the UK in the opinion of all sample groups. Many pointed out that Leeds compared favourably with London but also offered a more affordable standard of living.

Conclusion and suggestions for general improvements

The findings of the research are generally positive and compare favourably with those of the 1997 benchmark study. Many respondents could see some improvements in the City Centre over the last 2/3 years, which is encouraging. Overall the picture described by the research is of a City Centre that the majority of users rate highly and that is even rated highly by those who more often than not chose to use another centre. People like the feel of Leeds and are increasingly describing an image of sophistication that they feel the City Centre is exhibiting. Many users' enthusiasm for the City Centre allows them to "forgive" minor irritations or rationalise them away as "big city" problems that cannot be escaped from.

However, this general success comes with a price attached. There is clear evidence that users are becoming more fastidious about the range of facilities provided. That is, users are now taking for granted a good mix of shops and a pleasant shopping environment and are attaching greater importance to "softer" features such as the architecture and design of the centre.

A range of improvements were suggested, including; general improvements to the transport system, particularly, public transport on Sundays; improving parking facilities, lower parking fees and increased car park security; better "signposting" around the City Centre; improving air quality; more open spaces, sports and leisure facilities; improved Sunday opening; and greater availability and improved maintenance of public conveniences.

Unfortunately many of these comments matched the suggestions made in 1997. These areas where improvements have been suggested should be the focus of debate amongst those organisation with an interest in the future success and vitality of the City Centre.