



# Leeds City Centre Audit

## An Overall Research Report

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Research

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# 1. Introduction

This report presents the findings of survey research designed to inform the Leeds City Centre Audit. The research was undertaken by the independent research agency QA Research.

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 for some considerable time. Planning guidance put forward in 1996 by the Department of Environment, Transport and the Regions 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."**

*At this time the DETR advised 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.*

Data relating to a range of indicators, together with the results of consultation with key stakeholder groups, has been used in compiling the Leeds City Centre Audit. The key topics covered are:

- Policy
- Retail Trends
- Pedestrian Flow
- Movement
- Office Market
- Employment
- Housing
- Leisure and Tourism
- Community Safety
- Environment and Sustainability

As the range of data collected under these headings continues to develop the City Council is developing an enhanced understanding of how the city centre is performing and is progressively beginning to take actions in light of findings resulting from the audit process.

To assist in monitoring and evaluating the health of the City centre a programme of public consultation was also required. A benchmark survey to fulfil this need was initially carried out in 1997 and repeated in 2000/2001 and 2003/4. Now the latest wave of this public consultation has been conducted through a programme of market research.

What follows is an account of an extensive surveying project aimed at uncovering how satisfied people are with the services and facilities available in the city centre. As detailed below, the research targeted a range of separate samples; residents, visitors, non-users and workers. Each sample informed four separate reports.

*This* report combines the results from all samples at a topline level to provide a broad summary of findings and comparisons between the samples, and between data now and data from the 2004 research.

Throughout this report we refer readers to the four sample reports where considerable detail is held. All additional reporting is held by Jo Rowlands at Leeds City Council.

In the following sections we provide a statement of the *Methods* used in this research, outline our *Key Findings*, and offer our *Conclusions*.

## 2. Methodology

### 2.1 Methods

The Leeds city centre perceptions survey was undertaken by the following methods:

- Residents research - 1,100 interviews undertaken by telephone
- Workers research - 299 face to face interviews in Leeds city centre
- Visitors research - 296 face to face interviews in Leeds city centre
- Non-users - 412 interviews undertaken by telephone

Both these samples and the overall total of 2107 completed surveys provide robust data on the views of users and non-users of Leeds city centre. See section 2.2 for detail on statistical validity of the samples.

In addition to the core survey research, qualitative research was undertaken in the form of three focus groups in order to explore further key issues emerging around access, parking, and the general environment of the city centre.

All three groups were recruited from respondents to the surveys, and were a mix of residents and workers in Leeds. Two groups each had eight participants, with the third having six. All groups had a spread of ages, ethnic backgrounds and a mix of gender. All groups were moderated by QA Research to a script agreed with the Council.

The findings from these sessions have been placed at relevant points throughout the report as inserted boxes of text.

Finally, the initial results from the research were presented to Leeds City Centre Partnership Board members, who were then taken through an envisioning exercise to establish what might need to be done, in the light of results, to answer the following projective question:

*'It is 2017 and the experience of the environment of the city centre in Leeds is just right for all users; what actions were taken to make this happen?'*

The information resulting from this section is presented throughout the report. All survey materials used can be found in their respective individual sample reports.

### 2.2 Statistical Reliability

In this research we have achieved 2107 returned surveys. Using statistical rules, we can be 95% confident that our overall research findings have a potential variance of no more than plus or minus 2%. This exceeds the commonly used threshold of plus or minus 3%, as in BVPI General User Satisfaction Surveys.

The robust nature of the results continues at the sub-sample level:

- Residents research: 1,100 = potential variance of no more than plus or minus 3%
- Workers research: 299 = potential variance of no more than plus or minus 6%
- Visitors research: 296 = potential variance of no more than plus or minus 6%
- Non-users: 412 = potential variance of no more than plus or minus 5%

### 3. Key Findings

In this section we document the key findings based on our overall research with residents, non-users, workers and visitors to Leeds city centre.

As not all questions were answered by all respondents due to the slightly different surveys used per sample, significant differences between samples are reported only for common questions. This data is also compared to the findings from the 2004 research to identify trends over time where possible.

For clarity of reporting, throughout we have netted responses to refer to respondents as *satisfied* or *dissatisfied*. This classification refers to the collective responses of people who responded that they were either *fairly / very satisfied*, or *fairly / very dissatisfied*. If a sample was not asked a certain question, and therefore no data gathered, 'NA' is shown in tables.

Where figures do not add up to 100% this is due to rounding of results to the nearest whole number. In a few cases very low 'don't know' responses (usually 1%) have not been included.

#### 3.1 Frequency of City Centre Use

The greatest proportion of respondents uses the city centre for 'shopping' (72%), as in 2004 (73%). A minority of respondents (1%) use the city centre to 'travel on elsewhere'.

Figure 1: Respondents' most often used facility

	2007	2004	Residents	Visitors	Workers	Non-users
Shopping	<b>72%</b>	73%	72%	74%	NA	NA
Work	9%	3%	11%	<1%	100%	NA
Pubs/clubs/bars	6%	10%	6%	6%	NA	NA
Restaurants/cafes	3%	3%	3%	2%	NA	NA
Galleries/museums/theatre	2%	2%	2%	<1%	NA	NA
Other services (hospital, church)	2%	2%	2%	2%	NA	NA
Other leisure/entertainment activities (i.e. cinema, bowling, sports activities etc)	1%	2%	1%	1%	NA	NA
To travel on elsewhere	1%	1%	1%	1%	NA	NA
Other categories	4%	1%	2%	13%	NA	NA
	1357	1820	1100	257	296	0

In particular, as may be expected, residents were more likely (11%) than visitors (<1%) to use the city centre for 'work'.

Non-users of Leeds city centre were asked to consider where they mainly visit on a regular basis for either non-food shopping or for leisure or entertainment purposes. York proved to be the most popular destination of those suggested, accounting for 13% of non-food shopping and 11% of entertainment and leisure visits. Relatively large proportions of respondents identified an 'other' destination (34% for non-food shopping and 47% for leisure and entertainment). Of these 'other' destinations, Scarborough and Doncaster proved the most popular. Two thirds (67%) of non-users reported that they used their alternative location rather than Leeds city centre because it was 'convenient, near home' for shopping and 63% considered it 'convenient, near home' for leisure and entertainment purposes.

Respondents were then asked how frequently they visited Leeds city centre. Overall, as in 2004, respondents were most likely to say that they visit the city centre 'once a week' (20%).

Figure 2: Frequency of visits to the city centre for the main reason they visit

	2007	2004	Residents	Visitors	Workers	Non-users
Daily (or a few times each day+)	8%	4%	9%	4%	NA	NA
Every other day	2%	2%	2%	1%	NA	NA
Three times a week (every few days)	5%	5%	6%	2%	NA	NA
Twice a week	10%	9%	11%	5%	NA	NA
Once a week	<b>20%</b>	22%	22%	13%	NA	NA
Three times a month	4%	4%	4%	6%	NA	NA
Twice a month (every fortnight)	11%	14%	11%	8%	NA	NA
Once a month	17%	18%	17%	18%	NA	NA
Every 2 months	6%	7%	6%	7%	NA	NA
Every 3 - 6 months	11%	11%	10%	16%	NA	NA
Every 7 - 12 months	6%	5%	2%	20%	NA	NA
	1351	1820	1100	251	0	0

As may be expected, residents are more likely to use the city centre *more frequently* than visitors. In particular, residents were more likely (9%) than visitors (4%) to say that they visit the city centre 'every day'. This illustrates the earlier finding that residents are more likely to use the city centre for work which is most likely to be on an 'everyday' basis.

A quarter (24%) of non-users of Leeds city centre similarly responded that they use their chosen location (for non-food shopping) 'once a week' with, in total, one half (49%) visiting *at least* once a week.

When respondents were asked what was the secondary reason they visit the city centre for, the most common reasons were for 'shopping' (62% of residents) and to go to 'restaurants and cafes' (32% of residents).

Figure 3: Respondents' secondary purpose for city centre visits

	Residents	Visitors	Workers	Non-users
Shopping	62%	21%	89%	NA
Restaurants/Cafes	32%	28%	43%	NA
Galleries/museums/theatre	25%	10%	13%	NA
Pubs/clubs/bars	21%	23%	45%	NA
Other leisure/entertainment activities (i.e. cinema, bowling, sports activities etc)	17%	8%	23%	NA
Other services (hospital, church)	11%	2%	2%	NA
To travel on elsewhere	5%	1%	10%	NA
Other categories	7%	5%	3%	NA
	1099	296	240	0

When asked who they visit the city centre with, the largest proportion of respondents said they visit 'alone' (44%) as in 2004 (45%). As we have seen previously, a large number of respondents

use the city centre for work and therefore they may be more likely to visit the city centre 'alone' for this reason.

Figure 4: Who do respondents visit the city centre with?

	2007	Residents	Visitors	Workers	Non-users
Alone	<b>44%</b>	45%	36%	0%	0%
With partner	33%	35%	24%	0%	0%
With friends	28%	26%	37%	0%	0%
With children	13%	15%	6%	0%	0%
With relatives	13%	15%	6%	0%	0%
With parents	2%	2%	6%	0%	0%
With colleagues	1%	1%	1%	0%	0%
Other	<1%	<1%	0%	0%	0%
	1346	1100	246	0	0

Visitors were more likely (37%) than residents (26%) to visit the city centre 'with friends'.

### 3.2 Perceptions of Leeds City Centre

The 'variety of shops' was stated as the most positive feature offered by Leeds city centre overall.

Figure 5: Top 5 positive features offered by Leeds city centre<sup>1</sup>

	2007	2004 (residents)	Residents	Visitors	Workers	Non-users
Variety of shops	51%	58%	49%	58%	53%	NA
Pedestrianised/traffic free streets	27%	13%	25%	32%	30%	NA
Choice/quality of places to eat	17%	15%	14%	22%	21%	NA
Attractiveness of central environment	15%	NA <sup>2</sup>	14%	21%	11%	NA
Shopping centres	14%	6%	NA	41%	42%	NA
	1689	1500	1097	296	296	0

<sup>1</sup> For the full list of answers please see data tables provided.

<sup>2</sup> Please note that the 2004 results are 'best fit' comparisons only, as the coding of open-ended responses in 2004 created many more, smaller groups of responses than in 2007. We have not attempted to compare these results to 2007.

Conversely, when asked to note up to three aspects that they liked least about the city centre, access and the attractiveness of the environment came top. It should be noted that 15% of all respondents noted there were no negative aspects at all.

Figure 6: Top 5 negative features offered by Leeds city centre<sup>3</sup>

	2007	2004 (residents) <sup>4</sup>	Residents	Visitors	Workers	Non-users
Ease of access by public transport	23%	8%	33%	4%	5%	NA
Attractiveness of central environment	19%	10%	27%	3%	6%	NA
CCTV and security	8%	15%	11%	2%	5%	NA
Availability and ease of car parking	8%	19%	NA	20%	24%	NA
Variety of shops	4%	3%	7%	1%	0%	NA
	1672	1500	1091	296	296	0

Those respondents who are non-users of the city centre were asked to consider whether there were any key improvements which could be made to Leeds city centre which would encourage them to use the city centre more frequently. The greatest proportion (54%) considered that nothing needs improving or that they don't know, with 11% considering that 'improved parking costs and facilities are needed.

Non-users were likewise asked to consider what Leeds city centre would have to offer to encourage them to use this more often. The most frequent responses given to this were<sup>5</sup>:

	Count	%
• More events, leisure and entertainment	139	35%
• Improved parking prices and facilities	59	50%
• Improved modes of public transport	49	12%

### Group discussions

To get an understanding of what separate elements a respondent to the wider survey might consider a city centre to be made up of, the groups were asked to consider what a city centre means to them. Universal elements chosen by the groups were:

- Shops
- Good range of places to eat
- Toilets (*should* be present, often not)

Less common choices included some cultural aspects:

- Bars and evening economy (younger respondents)
- Theatre
- Pedestrianised areas

<sup>3</sup> For the full list of answers please see data tables provided.

<sup>4</sup> Please note that the 2004 results are 'best fit' comparisons only, as the coding of open-ended responses in 2004 created many more, smaller groups of responses than in 2007.

<sup>5</sup> Base = 399

It was of note that the groups didn't pick 'offices' or places of work unprompted, and some did not feel a city centre included this non-leisure/shopping aspect. This may relate to the *experience* of a city centre rather than the physical infrastructure.

To explore what people thought made a 'good' city, and where Leeds might be in relation to that ideal, the groups were asked to think about cities or large towns they have visited, one that in their view provided a great experience, or was 'lovely' to go round **in daylight hours**. The following were discussed, with reasons why they stood out:

#### History and/or culture

Leeds was seen by a few to have lots of untapped architecture – 'let's look up!' – but many saw the experience as being very commercial, whereas other cities were visited purposely to 'see some history'.

*Chester – old/history, like York, pedestrian area*

*Rome – culture, safe, clean, easy to get around with metro and signage*

*Ilkley – nice buildings, mix of shops, history*

*York – buildings nice*

*Edinburgh – green, space, cultural*

A common issue relating to this aspect of an 'ideal' city was the need for a major concert venue, often alluding to the Sheffield Hallam Arena.

*"We are not smaller than Liverpool as a city so it seems strange that there is nowhere to have big bands"*

Equally there was a strong view amongst a minority in one group (all female) that there were too many lap-dancing clubs and casinos, creating social problems and also a poor image for visitors.

#### Interesting shopping and eating out

Having a variety of smaller independent 'artisan' shops appealed to older respondents (but also a few younger ones). However, many felt that Leeds was travelling away from this type of shopping experience due to the spending power of younger, fashion-conscious shoppers)

*"Kettering – nice to walk around, nice cafes, variety of shops, safe feeling due to low traffic (kids)"*

*"Lincoln - because of small specialist shops, nice to browse, more old fashioned, not all high-consumer shops."*

#### Clean and tidy

Parts of the city centre in Leeds were mentioned as being in a relatively poor condition, although recent improvements were acknowledged. However, critical comment was reserved for the litter and general mess felt to be left in Leeds after the evening economy, in particular when compared to Spanish towns with very frequent street cleaning and city centre refuse collections.

#### Open spaces to relax in

Some other cities were praised for their café culture and open (not necessarily green) spaces to allow people to simply sit and rest. It was felt by many that Leeds lacks these 'oases', although a few mentioned Nelson Mandela Gardens (and Millennium Square) as attractive, but a bit small – 'a pretty little break in a lot of concrete'. Manchester, a city praised for a range of reasons, was used as a comparator, in particular the Piccadilly area.

*"Manchester – open areas, Piccadilly Gardens, nice to sit in and watch, take time out"*

Ultimately, when prompted, most accepted that Leeds is primarily a shopping venue. A lot of change had already taken place over the last ten years, and the above comments might be best viewed as required 'fine-tuning', although the substantial exception is the 'arena'. Some participants felt there was actually a very diverse offer in Leeds to suit all, but that promotion of shopping and the evening economy dominated and obscured other opportunities.

### City Centre Management

In addition to the focus groups, the Leeds City Centre Partnership Board took part in an envisioning session in which they were asked to consider all the elements that would be required to answer the following projective question:

***'It is 2017 and the experience of the environment of the city centre in Leeds is just right for all users; what actions were taken to make this happen?'***

When discussing culture/history, the group agreed with the conclusions of those in the focus groups who felt that although Leeds did have culture, more needs to be done to promote it. They also understood that there would be a need for a separate venue in the future in order to compete with local cities such as Sheffield and Manchester.

Leeds is recognised internationally as a cultural centre: International events are well known in Leeds

- New museums have opened. Leeds recognised as a cultural centre
- The Leeds heritage trail is now in place
- 'Tate Leeds' has opened and has drawn a wider variety of visitors
- New arena has opened. Leeds now competes with Sheffield for music and cultural events
- Surrounding villages now have civic pride
- Leeds has a top football team again
- As a result of the new attractions, Leeds is drawing more people into the city

In addition, it was also felt that although the environment of Leeds is better than it has been in the past, more work should be done to encourage visitors to the City Centre.

Environment: Leeds is a cleaner, greener, safer city

- More people have been employed to keep the city clean
- The river has been cleaned up
- National legislation reducing packaging has led to a reduction in littering
- There is now a greater level of visible enforcement. More community safety/liaison officers helps people feel that the city is safe
- There are more police on the beat so people feel more reassured
- There are more public conveniences
- The pedestrian area is the same standard as Briggate's
- The waterfront now has its own marina to encourage more visitors
- More roof-top gardens has given the city centre a green feel

### 3.3 Accessing the City Centre

#### 3.3.1 Ease of access to the city centre

The main, usual method of transport most stated by respondents was by 'bus' (44%) followed by 'car or motorcycle' (34%). There is a significant fall in the likelihood of respondents using their car since 2004 (from 38% to 34%).

Figure 7: Respondents main method of transport for getting to the city centre

	2007	2004	Residents	Visitors	Workers	Non-users
Bus	<b>44%</b>	43%	51%	18%	42%	NA
Car/motorcycle	34%	38%	37%	33%	28%	NA
Train	14%	12%	8%	47%	7%	NA
Walk	4%	4%	2%	1%	15%	NA
Other	1%	<1%	2%	1%	1%	NA
Both equally (bus/train)	<1%	1%	1%	0%	<1%	NA
Bicycle	<1%	1%	<1%	0%	2%	NA
Not applicable	1%	-	0%	0%	5%	NA
	1690	2127	1100	294	296	

There are clear trends by type of respondent that can be seen in terms of different methods of transport into the city centre. However, they all have in common that they predominantly use public methods of transport to access the city centre.

For example, visitors are more likely (47%) than both residents (8%) and workers (7%) to use the 'train' as their main method of transport into the city centre. Workers and residents are more likely (42% and 51% respectively) than visitors (18%) to use the 'bus' to access the city centre, whereas non-users of Leeds city centre are most likely to travel by car to their main shopping and leisure destination; 62% of non-users use a 'car or motorcycle' as their usual mode of transport when going to their main shopping destination, with 63% likewise reporting that they use a 'car or motorcycle' for leisure and entertainment trips.

Over three quarters (80%) of respondents find access to the city centre using their usual mode of transport 'easy'. There is a significant increase against 2004 for respondents finding their usual journey into Leeds 'easy' (80% against 73%).

Figure 8: Ease of access using their usual mode of transport

	2007	2004	Residents	Visitors	Workers	Non-users
Very difficult	2%	2%	2%	2%	1%	NA
Quite difficult	6%	7%	7%	6%	4%	NA
Average	12%	18%	10%	15%	16%	NA
Quite easy	35%	35%	39%	28%	24%	NA
Very easy	45%	38%	41%	49%	54%	NA
Don't know	<1	-	0%	<1%	<1%	NA
Base	1695	1763	1100	296	299	0

Visitors and workers are more likely (49% and 54% respectively) than residents (41%) to find using their usual mode of transport 'very easy' for accessing Leeds city centre.

When asked what makes travelling into Leeds easy the main response was 'satisfactory public transport' (48%). Workers were more likely (56%) than residents (46%) to think this.

The main reason stated for what makes travelling into Leeds difficult was 'unsatisfactory traffic and road systems' (7%).

### 3.3.2 Public transport access to the city centre

When asked to think about public transport into and away from the city centre, 55% said that it was 'good'. The same figure was 57% in 2004, showing little change.

Figure 9: Effectiveness of the public transport system for accessing the city centre

	2007	2004	Residents	Visitors	Workers	Non-users
Very poor	6%	3%	8%	1%	5%	NA
Quite poor	8%	7%	10%	3%	5%	NA
Average	16%	33%	18%	11%	17%	NA
Quite good	<b>30%</b>	33%	32%	21%	29%	NA
Very good	25%	24%	22%	32%	31%	NA
Base	1645	1201	1100	296	249	0

Base = 1,100

Residents were more likely (8%) than visitors (1%) and workers (5%) to say that it was 'very poor'. Residents were more likely (30%) than visitors (5%) or workers (4%) to say the reason for a negative response was 'irregular/unreliable; long waits; and a slow service'.

A third (35%) of respondents said that the public transport system in Leeds has 'stayed the same' over the last 2 to 3 years. There is little change against 2004.

Figure 10: Has the public transport system in Leeds improved over the last 2 - 3 years?

	2007	2004	Residents	Visitors	Workers	Non-users
Deteriorated a lot	6%	6%	7%	1%	6%	NA
Deteriorated a little	10%	8%	12%	4%	8%	NA
Stayed the same	<b>35%</b>	41%	35%	34%	35%	NA
Improved a little	18%	16%	20%	13%	16%	NA
Improved a lot	7%	10%	7%	4%	9%	NA
Don't know / Hard to say	25%	20%	19%	44%	27%	NA
Base	1646	1201	1100	296	250	0

Residents and workers were more likely (7% and 6% respectively) to say that the public transport system has 'deteriorated a lot' over the last 2 to 3 years than visitors (1%).

Respondents were most likely to say that the reason they had given a positive answer was because public transport has 'better coverage; is more frequent and more reliable' (14%).

In explaining their negative answers, one in ten respondents (11%) said this was because of 'less coverage; less frequent and less reliable' public transport. Residents were more likely (14%) than workers (6%) to state this as a reason for their negative answer.

### 3.3.3 Ease of access within the city centre

A large proportion of respondents (88%) said that they find it 'easy' getting around the city centre.

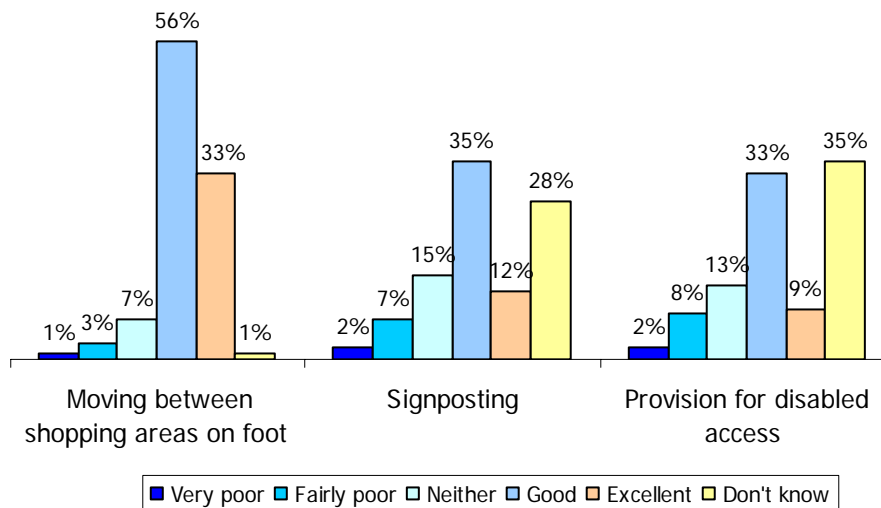
Figure 11: Ease of getting about within the city centre

	2007	Residents	Visitors	Workers	Non-users
Very easy	44%	36%	56%	61%	0%
Easy	44%	52%	35%	25%	0%
Neither easy nor difficult	6%	5%	6%	11%	0%
Difficult	4%	5%	2%	2%	0%
Very difficult	1%	1%	1%	<1%	0%
Base	1695	1100	296	299	0

Visitors and workers (57% and 61%) were more likely than residents (36%) to say that they find it 'very easy' to get around the city centre.

Figure 12 below illustrates that most respondents (89%) find 'moving between shopping areas on foot' good or excellent<sup>6</sup>.

Figure 12: Issues of access around the city centre



Base = 1695

When respondents were asked what ways they think accessibility within Leeds city centre could be improved, the most common answers were to 'Improve public transport: bring in tram system; improve bus service; publicise or extend free bus service; and implement park-and-ride' (8%) and 'Improve disabled/pushchair access; disabled toilets and baby changing; more access for wheelchairs and pushchairs and more disabled and family parking' (12%).

In particular, residents were more likely (10%) than workers (2%) to say that 'public transport changes' would improve accessibility around the city centre.

<sup>6</sup> For individual breakdowns please see each individual report.

### Group discussions

The qualitative research also explored users' experiences of accessing and navigating around the city centre.

Overall, very few respondents had encountered or would expect to encounter difficulties **getting in and out** of the centre. This was generally because they knew 'their' city and as with any major city, signage and layout was navigable. Some older respondents felt that parking was 'a nightmare' as was congestion. Others felt that driving in was 'do-able' but as in other cities, could be hard work.

There were some detailed comments on the issues around parking and bus costs, which arose unprompted initially. Overall parking is seen as costly and sometimes hard to find, while buses were seen by a few as costly and in need of a more direct routing (perhaps direct shuttles to add to, not replace, stopping services).

In two groups some detailed discussion took place on the need for a 'proper' park and ride, as per York, that runs shuttles, without intermediate stops. Overall, with the exception of evening coverage, the groups were positive about buses and wider public transport however. Some older respondents did suggest that a more connected public transport 'interchange', such as in Sheffield, might be beneficial.

Again, in terms of **navigating** once in the city centre, few had encountered or would expect to encounter difficulties. This was largely due to familiarity, but also good signage and a compact shopping area.

The improvements to pedestrianisation in Briggate were well received, and seen as tidier and a model for the rest of the city centre where possible. However, some elderly members had concerns over the potential slipperiness of new paving.

However, one disabled group member often uses Shopmobility, and although access and layout in the city centre is not a problem, the attitude of people to getting out of the way can be very negative. In particular there were problems in the market accessing stalls.

#### 3.3.4 Use of the free City Bus

One in five (20%) respondents have used the Free City Bus. Workers were more likely (27%) than residents (19%) and visitors (15%) to have used the service.

Of those who have used the service, the majority (89%) are satisfied with the service. A quarter (26%) of respondents said that it has changed the way they move around the city centre 'a little' and 17% 'a lot'.

### 3.3.5 Parking

Nearly a third (29%) of respondents feels that the parking facilities in Leeds city centre are 'poor', with 38% unable to answer. The scores for 'good' and 'poor' are similar to 2004.

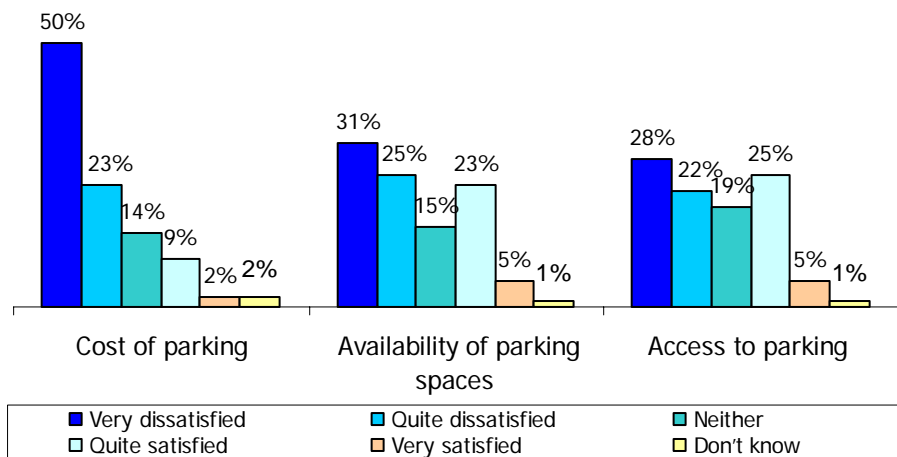
Figure 13: Parking facilities

	2007	2004	Residents	Visitors	Workers	Non-users
Very poor	12%	11%	14%	6%	11%	NA
Quite poor	17%	19%	18%	13%	16%	NA
Average	17%	28%	18%	15%	17%	NA
Quite good	13%	13%	13%	13%	12%	NA
Very good	4%	5%	4%	2%	4%	NA
Don't know	38%	23%	34%	51%	41%	NA
Base	1683	2137	1100	291	292	0

As Figure 14 shows, Respondents were most likely to be very dissatisfied with the 'cost of parking' (50%).

Over half of respondents were dissatisfied with the 'availability of parking spaces' (56%).

Figure 14: Satisfaction with aspects of parking facilities



Base = 765

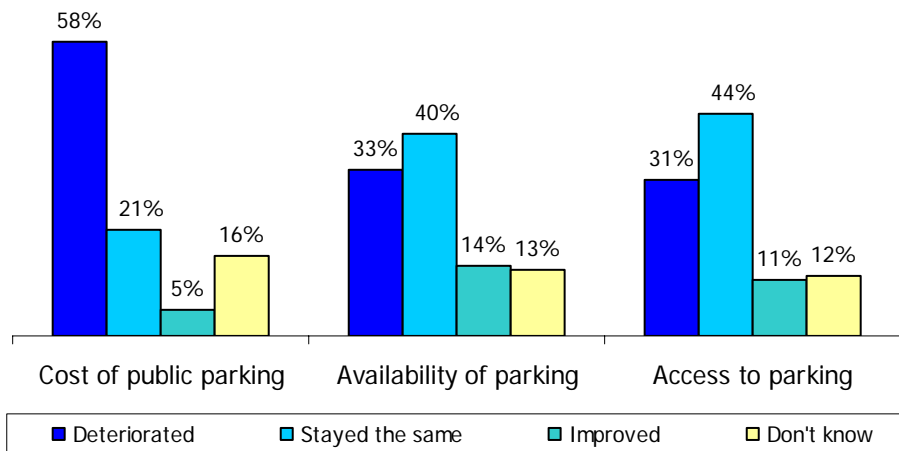
When respondents were asked why they held these opinions, the most common reason was because it is 'too expensive' (21%)<sup>7</sup>.

<sup>7</sup> See individual reports for more details.

Overall, 58% of respondents said the 'cost of parking' had deteriorated in the last 2 to 3 years.

A small proportion (14%) of respondents said that 'availability of parking' has improved.

Figure 15: Aspects of parking over the last 2 - 3 years<sup>8</sup>



Base = 1051

### Group discussions

Parking was an issue that the groups all wanted to talk about without prompting. In the actual section of the discussion dedicated to parking, issues of high and increasing costs, the need for good local knowledge of the 'best' places to park, and the impact parking has on people's activities in the city centre were explored.

Around half the group members regularly parked in the city centre. A few did not drive, while others avoided driving into the centre if possible, at least partly due to parking prices. This particularly affected city-centre workers, who would not choose to drive due to cost and 'hassle'.

*"If I come in for work I have to catch the bus as I can't afford the parking"*

When asked what first came into their thoughts regarding parking in central Leeds, high cost was the most common thought. Other initial thoughts included the poor safety aspects of getting back to some car parks in the dark, and the poor availability of spaces near the hospital.

Most were happy that they knew where car parks were in Leeds, but not all were so confident they knew which were cheaper. Most agreed that more information would be useful, even if they already felt well-informed.

There was some debate about cost; some felt that if people were happy to walk a bit further, prices fell away from the immediate centre. However, the sheer convenience of central parking outweighed costs for some, while for others it was an issue of safety and/or practicality; parking near the destination or shops was the only option.

*"If you have been shopping in Leeds for three hours and you have got lots of bags the last thing you want to do is go and catch a bus"*

That there were other options was known to a few, but it was felt that either people are lazy or alternatives are not well known:

<sup>8</sup> For individual results please see the individual reports.

*"In the south side of Leeds you can park cheaply and get a mini bus into town – but no-one does"*

In terms of the effect on their activities, parking prices meant that people were altering behaviour, and in complex ways. Some felt that high prices for short term parking made 'popping in' to the centre for a few items impractical. Others felt that the cost was high anyway, so they stayed longer to get more things done in one go. Still others felt that the price was worth paying for the flexibility, but also recognised that rushing back to beat the meter times was a limit to browsing in shops. Browsers would need to have lots of cash to pay into meters and not be worried, or use public transport.

Finally parking is one factor as to why people go to out-of-town retail areas such as White Rose for bulky items, as respondents wouldn't think of city centre parking for this type of use. Equally they don't see the city centre for this use in general.

### City Centre Management

In addition to the focus groups, the Leeds City Centre Partnership Board took part in focus group session in which they were asked to consider all the elements that would be required to answer the following projective question:

***'It is 2017 and the experience of the environment of the city centre in Leeds is just right for all users; what actions were taken to make this happen?'***

One of the major features that the Leeds City Centre Partnership Board felt needed improving was the transport system. They felt that connectivity to and within Leeds was a particular drawback to potential visitors to the City Centre.

#### Leeds is a totally connected city

- There are more car parks. Developers have put them underground to make space for them
- There is a tram system from North Yorkshire that allows more people into the city
- There is a train/tram connection from the airport to the city centre
- There is pedestrian access to the south side of the station
- The pedestrian becomes prominent within the city centre
- There are more bridges across the river
- Leeds Bradford airport has continued to grow. There are now more visitors and more business as a result
- Doncaster has become an international airport which has attracted more people to Leeds (business and visitors)
- The high-speed rail link from Manchester airport has been built
- There is a heliport in the city centre. This enables 'stars' to get in to the new central venue
- The free bus goes south of the river
- More free buses encouraging more people into the city centre

### 3.4 Use of Leeds City Centre

As Figure 16 below shows, respondents are least likely to use the city centre for their grocery shopping as two thirds (67%) of respondents reported they 'never' use the city centre for this type of shopping.

Respondents are most likely to visit the city centre for leisure shopping (22%) and clothing shopping (25%) 'once a month'.

Figure 16: Frequency of shopping in Leeds city centre<sup>9</sup>

	Grocery shopping	Leisure shopping	Clothing
Daily (or a few times each day+)	1%	1%	1%
Every other day	1%	1%	1%
Three times a week (every few days)	1%	2%	1%
Twice a week	4%	5%	4%
Once a week	12%	16%	15%
Three times a month	1%	4%	4%
Twice a month (every fortnight)	3%	10%	10%
Once a month	4%	<b>22%</b>	<b>25%</b>
Every 2 months	2%	8%	9%
Every 3 - 6 months	3%	13%	15%
Every 7 - 12 months	1%	6%	6%
Less than once a year	2%	3%	2%
Never	<b>67%</b>	9%	7%

Base 1693

There is an overall trend that workers are more likely to use the city centre more frequently than residents for grocery shopping, in particular they are more likely (5%) to go 'every other day' than residents (<1%).

Three quarters (74%) of respondents said that they do not consider the city centre to be their main destination for buying large household items. Workers were more likely (41%) than residents (26%) to consider or use the city centre for this reason.

When asked what destination they would usually go to, to buy large household items, nearly a third (31%) said 'retail parks'.<sup>10</sup> Residents were more likely (40%) than workers (12%) to state this.

### 3.5 Facilities Available

Respondents were asked what the most important features are to them when shopping in Leeds city centre and how they rate facilities or factors in Leeds city centre on a scale of 1 to 5. We present aggregated mean scores, where the higher the value, the more important or better performing the factor.

<sup>9</sup> For individual results please see the individual reports for more details.

<sup>10</sup> However, no specific retail parks were mentioned.

Respondents were most likely to feel that issues of safety, environment and variety of shops are what are most important when shopping in the city centre. For example, the 'overall shopping environment' (4.4) and the city being 'kept clean and tidy' (4.5) are seen as highly important.

In 2004 the issues of importance were the city being 'kept clean and tidy' (4.4), the mix of shops (4.4) and that the location is well-maintained (4.3).

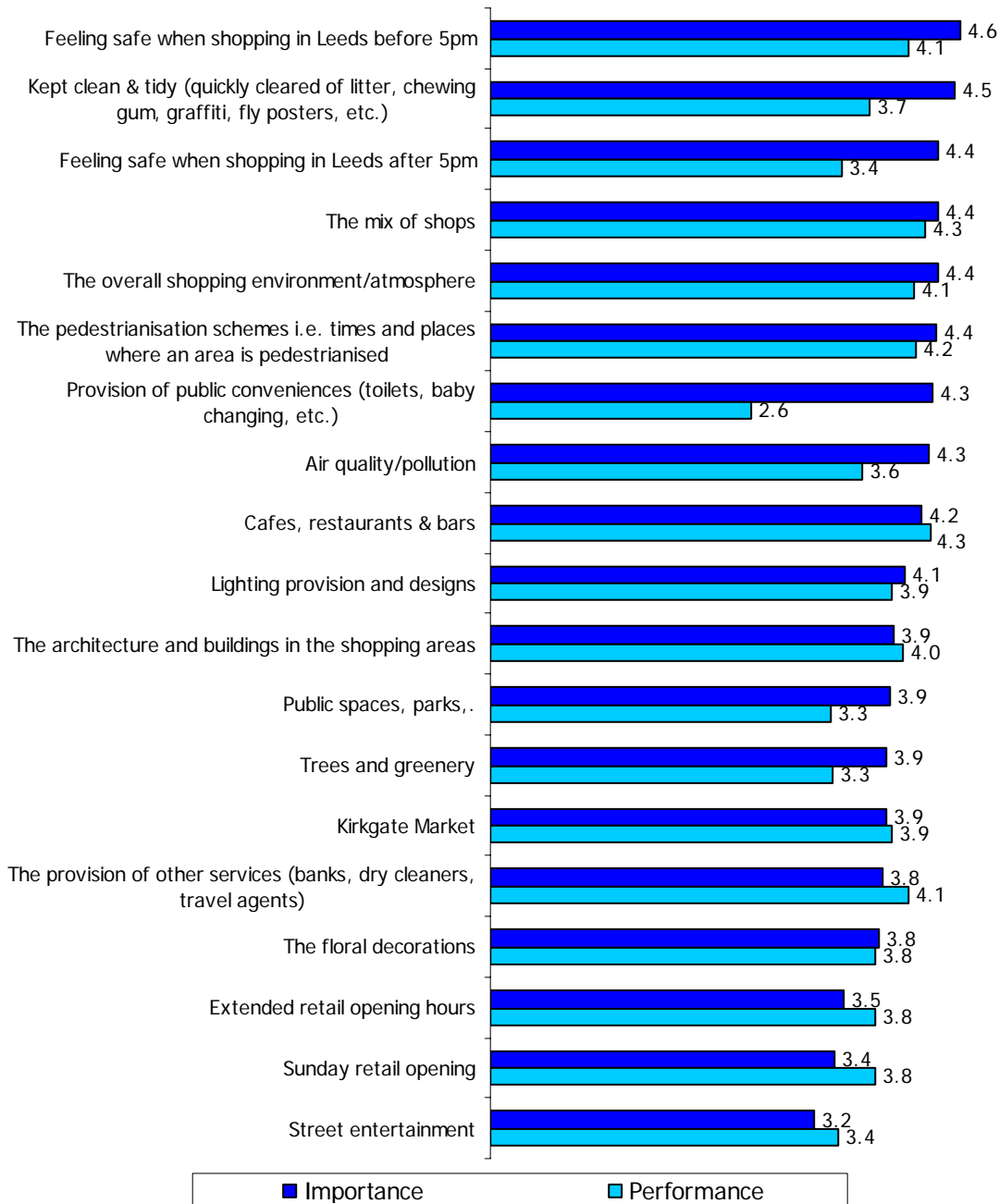
Whereas, for performance respondents feel retail based facilities perform best such as 'extended retail opening hours' (3.8), the 'provision of services' (4.1) and 'cafes, restaurants and bars' (4.3). Therefore respondents overall feel that issues of safety and a clean environment are important, however more retail based issues are actually performing well<sup>11</sup>.

In 2004 respondents felt that the following aspects of the city centre were the highest performers: the mix of shops (4.3), cafes bars and restaurants (4.3) and the overall shopping environment (4.1).

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<sup>11</sup> For more detailed information please see each individual report.

**Figure 17: Shopping in the city centre average score (1 = Very unimportant/ Very poor, 5= Very important/ Very good)**



Base = 1,695

### 3.5.1 Shopping facilities over the last 2 to 3 years

Half of respondents (50%) said that shopping facilities in the city centre have 'improved' in the last 2 to 3 years. This is less than the 65% of 2004, suggesting a slowing of improvement or increased expectations (or both).

Figure 18: Have shopping facilities improved, stayed the same or deteriorated in the last 2 to 3 years?

	2007	2004	Residents	Visitors	Workers	Non-users
Deteriorated a lot	2%	2%	2%	0%	1%	NA
Deteriorated a little	9%	3%	12%	2%	4%	NA
Stayed the same	30%	26%	26%	37%	40%	NA
Improved a little	<b>33%</b>	29%	33%	29%	33%	NA
Improved a lot	17%	36%	21%	10%	12%	NA
Don't know	9%	5%	5%	21%	10%	NA
Base	1695	2137	1100	296	299	0

Interestingly, residents were more likely (21%) than both visitors (10%) and workers (12%) to say that shopping facilities have 'improved a lot' in the past 2 to 3 years.

Respondents were most likely to say that facilities have improved because of a 'better variety of shops' (41%)<sup>12</sup>.

## 3.6 Environment and Open Spaces

Over half (58%) of respondents are aware of the new paving in the Briggate area of the city centre. Of these, over three quarters (83%) would like to see this quality of paving throughout the rest of the city centre.

The main features respondents most want from open spaces have been identified as 'space to sit and relax' (77%) and for them to 'offer an attractive appearance' (43%). Therefore this illustrates it is not only space that is most wanted, but also what the open space is and looks like.

<sup>12</sup> For a full breakdown of results see each individual report.

Figure 19: Most wanted features in public open space

	2007	Residents	Visitors	Workers	Non-users
Space to sit and relax	<b>77%</b>	79%	72%	75%	NA
Offer an attractive appearance	43%	47%	35%	35%	NA
Space to take young children	21%	26%	8%	14%	NA
Space for special events	20%	23%	13%	17%	NA
Space to exercise	8%	10%	1%	6%	NA
Greenery	5%	7%	0%	0%	NA
Clean and tidy	3%	5%	0%	0%	NA
Nothing / don't know	6%	6%	4%	4%	NA
Other	6%	8%	3%	3%	NA
Base	1695	1100	296	299	0

Residents were more likely than workers to want open spaces to include 'space'. For example, they are more likely (23%) than workers (17%) to want 'space for special events'.

Half (51%) of respondents do not think that the city centre has enough public open spaces. Residents and workers are more likely (56% and 52% respectively) than visitors (31%) to say the city centre does not have enough public open spaces.

### 3.7 Use of Alternative Facilities

Over half (58%) of respondents use other city centres or out of town locations on a regular basis. Residents are more likely (56%) than workers (45%) to do so.

The top 5 most commonly used alternative locations can be seen below (figure 20)<sup>13</sup>. The White Rose Centre is the other location most used by respondents (23%). Responses are similar to 2004, although more respondents in 2007 seem to use their district centres.

Figure 20: Alternative locations regularly used for shopping

	2007	2004	Residents	Visitors	Workers	Non-users
White Rose Centre	<b>23%</b>	30%	28%	7%	30%	NA
York	15%	15%	18%	11%	13%	NA
Harrogate	12%	10%	17%	3%	6%	NA
Out of town retail parks (i.e. Crown Point, Killingbeck, Junction 27, Colton, etc.)	11%	14%	16%	2%	8%	NA
District centres (e.g. Otley, Pudsey, Morley)	10%	3%	15%	2%	4%	NA
Base	983	1441	612	236	135	0

<sup>13</sup> For a full breakdown of locations visited by residents, visitors and workers please see each individual report as there are a number of different locations.

Residents were more likely (15%) than workers (4%) to use district centres such as Otley, Pudsey and Morley.

When asked why respondents use these alternative places, 'convenience' was the main theme of responses<sup>14</sup>.

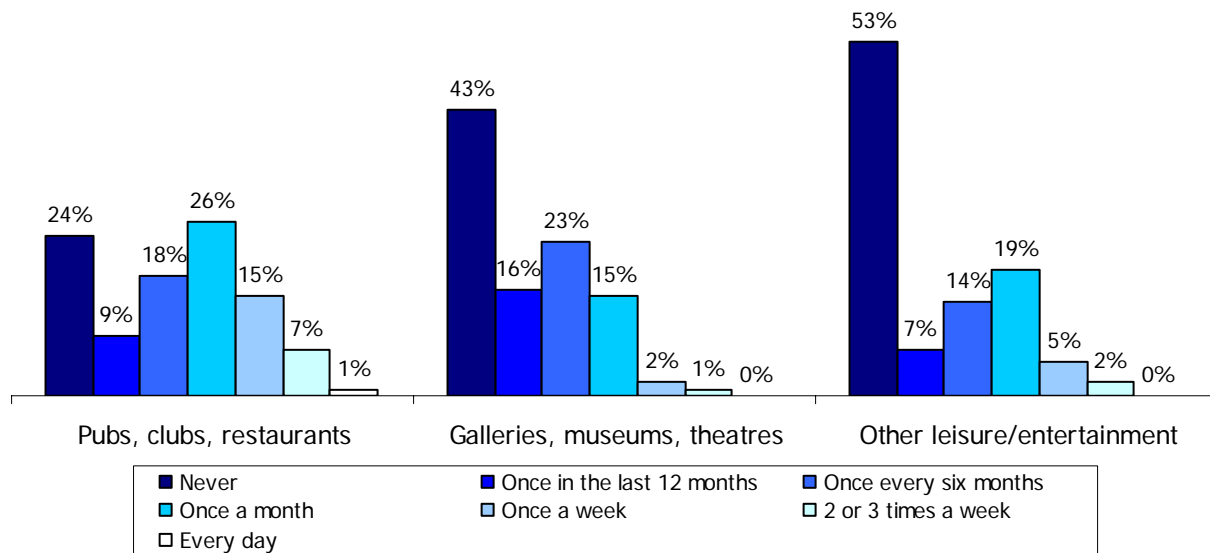
In particular, the most common reason stated for respondents using out of town retail parks is that 'parking is cheaper' (51%).

### 3.8 Use of Leisure Facilities

Respondents are most likely to have visited pubs, clubs and restaurants in the city centre 'once a month' (26%).

Galleries, museums and theatres are most likely have been visited by respondents 'once every six months' (23%).

Figure 21: Use of leisure facilities in the city centre during the last 2 - 3 years<sup>15</sup>



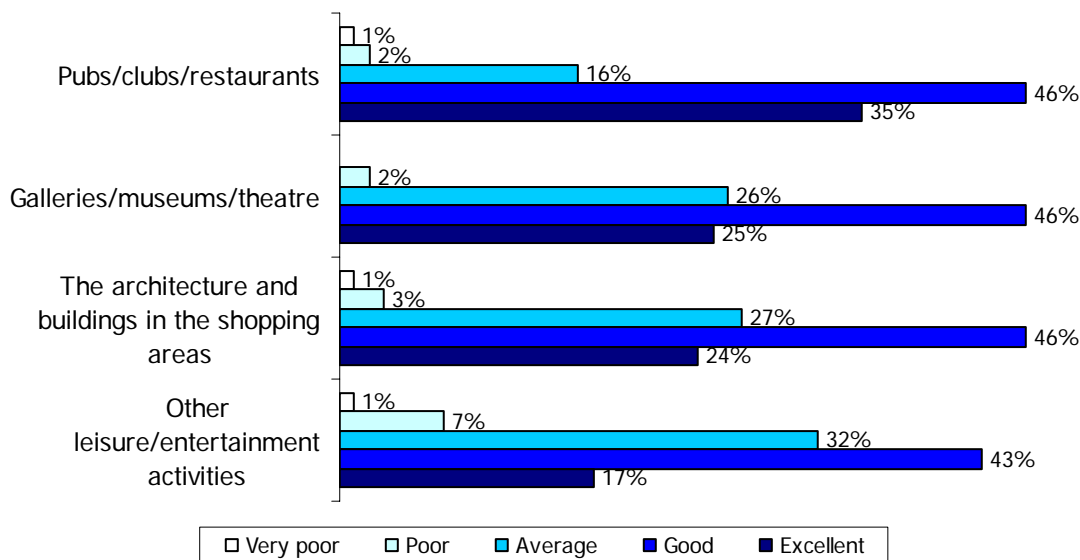
Base = 1695

<sup>14</sup> Please see the individual data tables for results per location.

<sup>15</sup> For individual breakdowns please see individual reports.

Overall, respondents are positive about the facilities available in the city centre. In particular, a third (35%) of respondents feel that the pubs, clubs and restaurants are 'excellent'.

Figure 22: Rating the facilities available within the city centre<sup>16</sup>



Base = 1688 (maximum)

Residents are more likely (31%) than workers (17%) to feel that the galleries, museums and theatres are 'excellent'.

Overall a third (30%) of respondents said that leisure facilities have improved over the last 2 to 3 years.

Figure 23: Leisure facilities improvement over the last 2 - 3 years

	2007	2004	Residents	Visitors	Workers	Non-users
Deteriorated a lot	2%	2%	2%	0%	2%	NA
Deteriorated a little	5%	3%	6%	1%	2%	NA
Stayed the same	<b>29%</b>	32%	26%	29%	42%	NA
Improved a little	23%	25%	27%	15%	20%	NA
Improved a lot	7%	22%	9%	2%	6%	NA
Don't know	34%	16%	30%	53%	29%	NA
Base	1693	2137	1100	296	297	0

Residents were more likely (27%) than workers (20%) to feel that leisure facilities have 'improved a little'.

When respondents were asked how facilities could be improved in the future, the most frequent response was for a 'concert hall or music venue' (8%)<sup>17</sup>. As may be expected, both residents (10%) and workers (7%) were more likely than visitors (1%) to feel this would improve facilities.

Over half (55%) of respondents have been to the Christkindel Market. As may be expected residents and workers are more likely than visitors to have been to any of the events listed.<sup>18</sup>

<sup>16</sup> For individual breakdowns please see individual reports.

<sup>17</sup> For a full breakdown of responses see each individual report.

<sup>18</sup> For more information please see the individual reports.

Figure 24: City centre event attendance over the last 2 - 3 years

	2007	2004	Residents	Visitors	Workers	Non-users
Christkindel Market (German Christmas Market)	55%	33%	64%	14%	59%	NA
Outdoor ice rink (Ice Cube)	33%	24%	38%	3%	37%	NA
Music concerts	27%	19%	29%	15%	34%	NA
Christmas lights switch on	24%	-	30%	5%	24%	NA
Open air photography exhibition (Earth from air, and Spirit of the wild)	19%	-	19%	8%	33%	NA
Leeds Food Festival	14%	-	15%	5%	22%	NA
Leeds Shopping Week	12%	-	13%	5%	20%	NA
New Years Eve Celebrations	9%	7%	10%	3%	14%	NA
The Breeze Festival	8%	-	10%	<1%	6%	NA
Leeds Half Marathon	7%	6%	9%	1%	7%	NA
Light Night (treasure hunt through the city centre in the evening)	1%	-	1%	1%	3%	NA
None	13%	43%	18%	2%	0%	NA
Other	12%	2%	2%	60%	1%	NA
Base	1602	2137	1100	295	207	0

### 3.9 Sunday Use of the City Centre

There was a similar response for respondents who have (48%) and who have not (52%) been to Leeds city centre on a Sunday in the last 12 months.

For those who have, the main reason for doing so was 'shopping' (77%).

Figure 25: Activities undertaken in Leeds on Sundays

	2007	2004	Residents	Visitors	Workers	Non-users
Shopping	77%	40%	80%	82%	69%	63%
Pubs/clubs/restaurants	33%	17%	26%	38%	48%	29%
Galleries/museums/theatre	16%	8%	6%	1%	48%	10%
Other leisure/entertainment activities (i.e. cinema, bowling, sports activities etc.)	11%	12%	10%	10%	15%	13%
Religious activities	1%	3%	2%	0%	0%	4%
None	2%	50%	1%	8%	2%	4%
Other	9%	1%	10%	1%	12%	11%
Base	812	2137	520	89	203	79

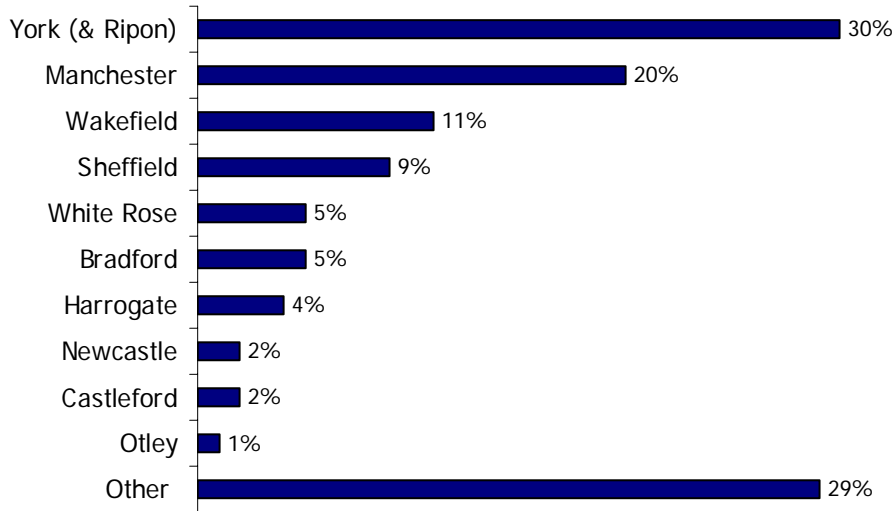
There are different patterns of the use of the city centre between residents and workers. For example, residents are more likely (80%) than workers (69%) to have used the city centre on a Sunday for 'shopping'. Workers are more likely (48%) than residents (26%) to go to 'pubs, clubs and restaurants' on a Sunday.

Residents are more likely (78%) than workers (56%) to do these activities in the city centre on a Sunday before 5pm. Workers are more likely (37%) than residents (19%) to do these activities both before 5pm and after 5pm.

One in five (22%) respondents does go into another town or city centre on a Sunday.

The most commonly stated other destinations are 'York and Ripon' (30%) and 'Manchester' (20%).

**Figure 26: Use of alternative town or city centre facilities on a Sunday (number)<sup>1920</sup>**



Base = 328

Residents are more likely (36%) than visitors (18%) to go to 'York and Ripon' on a Sunday.

A large proportion (40%) goes to an alternative location on a Sunday to go to 'pubs, clubs and restaurants'.

**Figure 27: Activities done at alternative location on a Sunday**

	2007
Shopping	74%
Pubs/clubs/restaurants	40%
Other	20%
Other leisure/entertainment activities	15%
Galleries/museums/theatre	6%
Religious activities	1%
Other	20%
None	1%
Base	377

<sup>19</sup> For further details please see each individual report.

<sup>20</sup> For other responses please see each individual report for specific answers.

Interestingly, three quarters (74%) of respondents said that 'nothing' would encourage them to go into Leeds city centre on a Sunday.

Figure 28: Factors which would encourage respondents to go into Leeds City Centre on a Sunday<sup>21</sup>

2007	
More events in the city centre; markets, entertainment etc	8%
More shops open / longer opening times	5%
Better public transport	4%
Better parking provision	3%
More time / money	3%
Safer environment - greater security etc	1%
More pubs/ clubs	<1%
If it was less busy	<1%
Nothing	74%
Base	1618

Two thirds of respondents said 'nothing' discourages them from going to Leeds city centre on a Sunday.

Figure 29: Factors which would discourage respondents to go into Leeds City Centre on a Sunday<sup>22 23</sup>

2007	
Personal choice / belief	6%
Poor public transport	5%
Sunday is for home / family life	4%
Poor parking / traffic	4%
Shops not open / not open long enough	4%
Too busy	3%
Anti-social behavior / feel unsafe	2%
Prefer to spend Sunday elsewhere	2%
Too quiet	1%
Bad weather	<1%
Lack of time / other commitments	<1%
Nothing	66%
Base	1642

The largest proportion (72%) of respondents said that they are 'neither' more nor less likely to go into Leeds city centre now than 12 months ago. In particular, residents are more likely (11%) than workers (5%) to say they are 'less' likely.

<sup>21</sup> There were no relevant significant differences between residents, visitors and workers.

<sup>22</sup> There were no relevant significant differences between residents, visitors and workers.

<sup>23</sup> For further information on encouraging and discouraging factors relating to separate respondent segments please see each individual report.

### 3.10 Evening Use of the City Centre

#### Group discussions

To explore what people thought made a 'good' city, and where Leeds might be in relation to that ideal, the groups were asked to think about cities or large towns they have visited, one that in their view provided a great experience, or was 'lovely' to go round **after dark**. The following were discussed, with reasons why they stood out:

#### Safety

Most group participants do not go out regularly in the city centre of Leeds either because they have 'done all Leeds has to offer' (younger) *or* don't feel safe, particularly in exiting the centre due to dark paths to car parks or taxi rank disorder. One group also extended this safety concern to not using a Leeds bus on one's own after dark. It should be noted that younger people that *had* used the centre in the past after dark did not have such prominent safety concerns.

*"I come into town at 11pm a night and I do not feel scared"*

#### Café Culture

Some felt that the 'drinking, clubbing' offer was all Leeds had, and that this was a wider national issue. Some felt that the relaxed mix of activities and in particular that whole families with all ages, went out in European cities made city centres feel safer and more attractive in general.

*"Southern Europe in general - different ages going out in the evenings"*

*"I would love to see older generations walking down Briggate but you don't"*

*"It's not the sort of environment I want to be in with the young people going out. That was me ten years ago. Now I want quieter areas to go"*

#### Venues

As noted elsewhere, major events, either in a city centre or at an arena venue, were seen as helping make a city's offer wider and 'bigger'. Millennium Square was noted, but seen by some as too small.

*"Sheffield – Hallam Arena, places to go, attracts big events such as snooker."*

#### Transport

Linked to feelings of safety, but also its own issue was the perceived lack in Leeds of good transport out of the centre. No positive comparator cities were suggested in this respect, but it was a common feeling in one group that buses do not run late enough (and as above, are not always seen to be safe).

It should be noted that despite the detail of the above concerns, on balance, Leeds was seen to have a vibrant night time economy, and many saw this as a good thing, if not catering to their tastes.

Interestingly, one in ten, (9%) of respondents visited 'galleries, museums or theatres' Monday to Thursday after 5pm in Leeds city centre.

Half (49%) of respondents use 'none' of the options listed in the survey after 5pm.

**Figure 30: Use of city centre facilities after 5pm Monday to Thursday<sup>24</sup>**

2007	
Pubs/clubs/restaurants	28%
Shopping	12%
Galleries/museums/theatre	9%
Other leisure/entertainment activities	8%
Religious activities	<1%
Other	14%
None	49%
Base	1642

On Friday or Saturday nights (after 5pm), 43% of respondents reported that they still do not use the city centre for any of the activities suggested.

**Figure 31: Use of city centre facilities after 5pm on a Friday or Saturday**

	2007	2004
Pubs/clubs/restaurants	39%	49%
Galleries/museums/theatre	11%	27%
Shopping	9%	24%
Other leisure/entertainment activities	9%	26%
Religious activities	<1%	2%
Other	11%	1%
None	43%	36%
Base	1695	2137

<sup>24</sup> There were no relevant significant differences between residents, visitors and workers. Please see individual reports for further information.

As seen previously with encouraging factors for use of the city centre on a Sunday, the largest proportion of respondents said that 'nothing' would encourage them to use the city centre after 5pm.

Figure 32: What would encourage respondents to use the city centre more after 5pm for shopping or leisure activities

	2007	Residents	Visitors	Workers	Non-users
Have more events; entertainment, theatre, etc	8%	10%	5%	3%	NA
Improve safety / reduce anti-social behavior	6%	7%	2%	3%	NA
Lengthen shopping hours	4%	4%	3%	3%	NA
Improve public transport	3%	3%	4%	2%	NA
Make it cheaper	1%	1%	1%	2%	NA
Improve parking provision	1%	2%	1%	<1%	NA
More places for 'a night out' - bars, restaurants, places for birthday parties etc	1%	2%	2%	0%	NA
Make city centre less busy	<1%	1%	0%	0%	NA
Make city centre more child-friendly	1%	2%	0%	0%	NA
I already go into Leeds after 5pm as much as I want	8%	5%	10%	18%	NA
Nothing	64%	63%	67%	62%	NA
Base	1685	1099	296	290	0

Residents were more likely (7%) than workers (3%) to say that 'improved safety and reduced anti-social behaviour' would encourage them to use the city centre after 5pm.

The top discouraging factor that stops respondents from using the city centre after 5pm is 'feeling unsafe due to anti-social behaviour' (20%). Residents were more likely (27%) than visitors (3%) to say this is an issue.

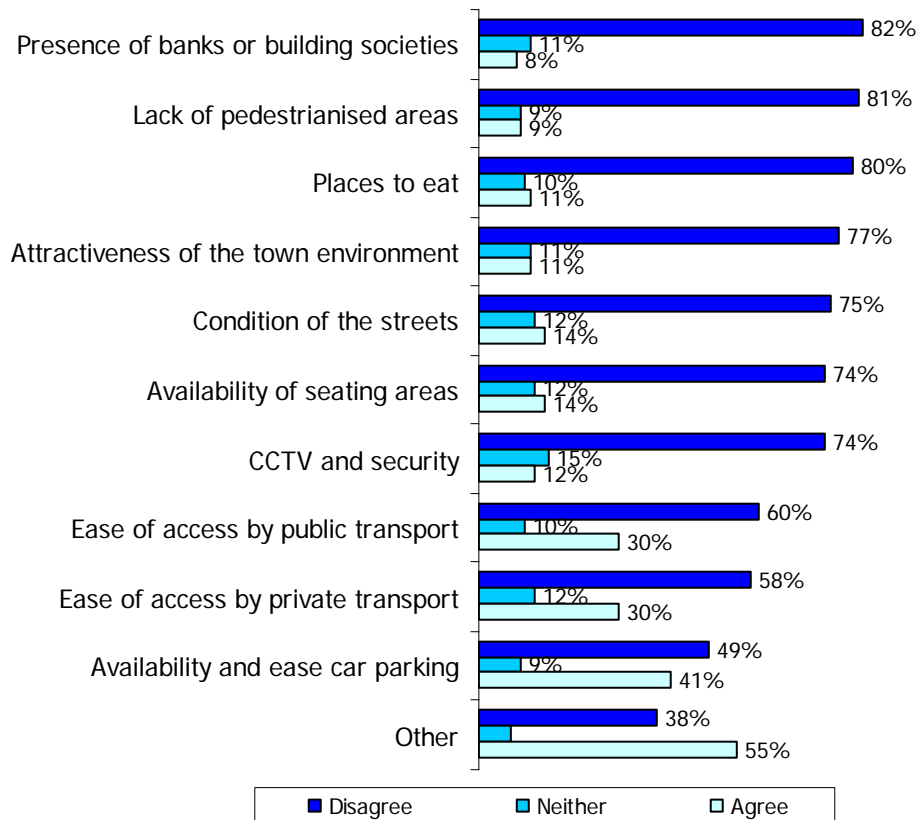
Interestingly, over half (60%) of respondents said 'nothing' discourages them.

**Figure 33: Discouraging factors that stop respondents using the city centre more after 5pm for shopping or leisure activities**

	2007	Residents	Visitors	Workers	Non-users
Feeling unsafe due to anti-social behaviour	<b>20%</b>	27%	3%	9%	NA
Poor transport access	4%	4%	4%	2%	NA
Just prefer not to	4%	5%	0%	3%	NA
Leisure facilities are not aimed at me	3%	4%	0%	0%	NA
Lack of / expensive parking	2%	3%	2%	1%	NA
Shops not being open	2%	2%	2%	1%	NA
Not child friendly	1%	1%	2%	0%	NA
Work / financial constraints	1%	1%	0%	1%	NA
Bad weather	1%	1%	0%	1%	NA
Prefer to go elsewhere	<1%	1%	0%	0%	NA
Lack of events	<1%	<1%	0%	0%	NA
Nothing	60%	49%	83%	78%	NA
Base	1665	1100	269	296	0

The key factors which stop respondents from coming into the city centre at any time are dominated by ‘personal transport’ issues relating to parking and access. Two fifths (41%) of respondents agree that the ‘availability and ease of car parking’ stops them from coming into the city centre and a smaller proportion (30%) agree that ‘access by private transport’ stops them from coming into the city centre.

**Figure 34: Level which factors stop respondents from coming in to the city centre at any time<sup>25</sup>**



Base = Variable

<sup>25</sup> For ‘other’ responses please see individual reports for more details.

Overall there is a trend that non-users are more likely to agree that most of the factors stated are ones which stop them from coming into the city centre than respondents who may actually use the facilities or methods used to access the city centre such as residents or workers. For example, non-users are more likely (39%) than residents (27%) and workers (13%) to say that 'ease of access by private transport' is a barrier to them coming into the city centre<sup>26</sup>.

Interestingly, residents are more likely (24%) than non-users (3%) to strongly disagree that 'access by public transport' stops them from coming into the city centre. Therefore non-users may have a perception that public transport is not easy to access the city centre by, however residents who are more likely to use public transport disagree that it is a barrier to them going into the city centre.

Since 24-hour drinking legislation came into force, 65% of respondents considered that they are neither any more, nor any less likely to travel into their local area rather than coming into the city centre.

Figure 35: Likelihood of travelling into local area rather than coming into the city centre

	2007	Residents	Visitors	Workers	Non-users
More	19%	22%	11%	14%	NA
Less	7%	8%	5%	8%	NA
Neither	<b>65%</b>	62%	73%	69%	NA
Don't know	9%	8%	11%	9%	NA
Base	1695	1100	296	299	0

Residents are more likely (22%) than workers (9%) to say that they are more likely to travel into their local area rather than going into the city centre.

### 3.11 Overall Satisfaction with the City Centre

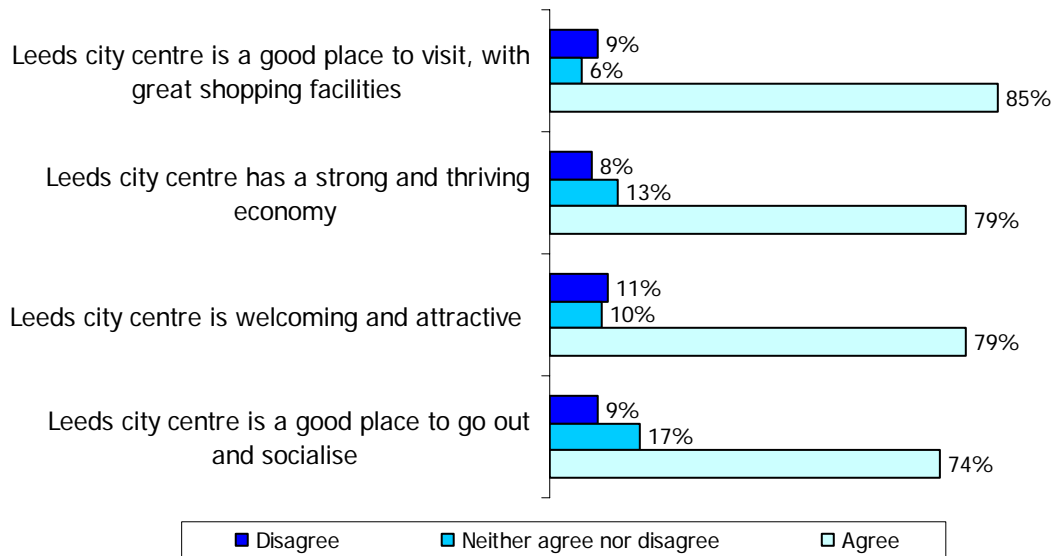
Overall, the largest proportion of respondents (89%) was satisfied with Leeds city centre as a place to visit. This is a significant increase on the score of 85% in 2004.

Figure 36: Overall satisfaction with Leeds city centre

	2007	2004	Residents	Visitors	Workers	Non-users
Satisfied	<b>89%</b>	85%	89%	97%	89%	72%
Neither / nor	7%	12%	7%	1%	9%	19%
Dissatisfied	3%	4%	4%	2%	3%	8%
Base	1810	2433	1100	296	299	115

When asked to what extent respondents agree with a number of statements about Leeds city centre the level of agreement for each statement was high.

<sup>26</sup> For more information please see the data tables which accompany this report.

Figure 37: Agreement with a series of statements about the city centre overall<sup>27</sup>

Base = Variable

As seen previously, non-users are more likely to have a negative view of the city centre than residents and workers. For example, non-users were more likely (20%) than residents (1%) to strongly disagree that 'Leeds city centre is a good place to visit, with great shopping facilities'.

The most common improvements suggested by respondents for the city centre overall mirror factors which would encourage respondents to use the city centre more. The potential importance of 'parking' (8%) and 'public transport' (8%) being improved are shown in figure 38.

Over half (56%) of respondents feel that 'nothing' needs improving.

Figure 38: Suggested improvements to the city centre overall

	2007	Residents	Visitors	Workers	Non-users
Improve parking provision	8%	10%	2%	5%	NA
Improve public transport / traffic system	8%	11%	1%	4%	NA
Improve attractiveness (buildings, litter etc)	8%	11%	1%	3%	NA
Improve safety, reduce anti-social behaviour	7%	8%	1%	6%	NA
Improve public conveniences (toilets, seating etc)	7%	9%	2%	3%	NA
More cultural (music, arts etc) venues	5%	7%	1%	0%	NA
More green areas	5%	6%	1%	2%	NA
More varied provision of shops / eateries	4%	5%	4%	3%	NA
More leisure (sports etc) venues	2%	3%	0%	0%	NA
More events	2%	2%	0%	2%	NA
Other	2%	2%	1%	1%	NA
Nothing	56%	41%	85%	84%	NA
Base	1635	1095	285	255	0

<sup>27</sup> For full details on results for residents, visitors, workers and non-users please see the data tables which accompany this report.

Visitors and workers were more likely (85% and 84% respectively) than residents (41%) to say that 'nothing' needs improving in Leeds town centre.

Although not directly comparable with 2007 data, the 2004 survey shows similar results, with improvements to parking (13%), public transport/traffic system (11%), security/antisocial behaviour/police presence (10%), cleanliness/litter (5%), more/improved public toilets (4%) cultural venues (4%) green areas (2%), variety of shops/eateries (2%) and leisure/sports venues (1%). 50% of the 2115 respondents said that 'nothing' needed improving.

### 3.12 Living in the City Centre

#### City Centre Management

In addition to the focus groups, the Leeds City Centre Partnership Board took part in an envisioning session in which they were asked to consider all the elements that would be required to answer the following projective question:

***'It is 2017 and the experience of the environment of the city centre in Leeds is just right for all users; what actions were taken to make this happen?'***

In addition to encouraging visitors to the city centre, it was felt that in order for the city to grow to its full potential as an enjoyable place to be, more people needed to actually live within the city centre itself.

The City Centre has become the first choice as a place to live

- People are living in the city centre
- People are satisfied with Leeds as a place to live
- There is a healthcare system to support the city centre population

## 4. Key Conclusions

### 4.1 Town and City Centre Use

- Local residents most frequently travel into Leeds city centre to go shopping, and satisfaction with the range of shops is high. Shopping remains the most popular activity either during the week (Monday to Saturday) or on a Sunday.
- Use of Leeds city centre for shopping on a Sunday has greatly increased for all respondents (excluding non-users) since 2004.
- Providing a range of independent 'artisan' shops appeals predominantly to older respondents, yet respondents consider that Leeds city centre is tending not to provide this type of shopping experience.
- Residents tend to identify a relatively low level of use of entertainment and leisure facilities in Leeds city centre.
- Residents indicate that the city is unclean and express low levels of satisfaction with the cleanliness and tidiness of the city.
- Workers are mostly likely to travel into Leeds city centre for some other reason once a week, yet tend to have a multi purpose reason for being in Leeds city centre. The greatest proportion of workers will combine their time in Leeds city centre for work with other activities, such as going to pubs, clubs or bars.
- Non-users of Leeds city centre use a broad range of alternative destinations, mostly because they are more convenient and the travelling which going to Leeds would entail. Pubs, clubs and restaurants are the most commonly cited reason for using their alternative destination.
- Visitors to Leeds city centre are likely to have visited before, with shopping being the key reason for the visit. Those visitors who stayed in Leeds overnight were most likely to stay with friends or relatives.

### 4.2 Access and Barriers to the Use of Leeds City Centre

- About half of residents currently use the bus to get into Leeds city centre, with most being satisfied with their experience of this. However, disabled residents found this slightly harder, and evening coverage is not considered as positively.
- For workers, conflicting views emerge surrounding the provision and use of public transport. The largest proportion of workers feel that it is satisfactory for travelling within Leeds. However, there is still a proportion who feel that over the last 2 to 3 years it has become less reliable and that there is less provision.
- Residents tend to demonstrate a low level of satisfaction with parking in the city centre. This relates primarily to cost, although issues of safety in car parks are also noted. Levels of satisfaction with accessibility and availability of parking are likewise low, suggesting that parking may be acting to deter residents from using the city centre, particularly for bulky items.
- For workers, particular problems are highlighted regarding the provision of parking, which acts as a key deterrent to coming into the city centre during the week and on a Sunday. It was also

said to be a main barrier to accessing the city centre as well as ease of access by public transport.

- About half of all visitors access Leeds city centre by train. Overall, visitors find accessing the city easy, with public transport in particular being considered reliable and regular. Satisfaction with parking facilities is lower, however, with cost being a key area of dissatisfaction.
- Those who are currently non-users of Leeds city centre are predominantly car or motorcycle users, with fewer using public transport as their main form of transport. This means that this group is likely to be sensitive to perceptions of parking or traffic difficulties in Leeds city centre.

#### **4.3 Moving Around Leeds City Centre**

- Residents express mixed views regarding the effectiveness of signposting and disabled access around the city, however, a large proportion of residents indicate that they don't know. Whilst a third of responses received are positive, there is room for improvement.
- Pushchair and disabled access is the most commonly identified improvement needed to accessing and travelling around the city centre itself, although two fifths of residents also considered that this accessibility is currently good. Amongst visitors to the city centre, satisfaction with disabled access provision is polarised which may suggest this is an area to concentrate ongoing improvement towards.

#### **4.4 Other Locations for Shopping, Leisure and Entertainment**

- More than half of residents use some alternative facilities to the city centre, most commonly the White Rose Shopping Centre. However, use of White Rose Shopping Centre as an alternative venue has decreased for all groups (excluding non-users) since 2004.
- Residents are also likely to report regularly using an alternative out of town location for other leisure activities. These other areas include, for example, Harrogate, Wakefield, Manchester and Bradford as areas which residents go to less frequently as an alternative to Leeds city centre.
- Over half of all workers report that they do not use other city or town centres for leisure and entertainment purposes. For those that do, the White Rose Centre is the predominant other location that workers in Leeds city centre visit for leisure and entertainment Monday to Saturday. The main reason given for this is that everything is close together.

#### **4.5 Overall Satisfaction with Leeds City Centre**

- Respondents broadly consider that Leeds city centre is a good place to visit, particularly for shopping or to socialise as it has a good mix of leisure and entertainment facilities. Levels of satisfaction with the services and facilities available remains high, with residents considering that amenities have improved in recent years. For example, resident satisfaction with pedestrianised, traffic free streets has increased since 2004, from 13% to 25%<sup>28</sup>.

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<sup>28</sup> Please note that the 2004 results are 'best fit' comparisons only, as the coding of open-ended responses in 2004 created many more, smaller groups of responses than in 2007.

- For visitors to Leeds city centre, the shopping experience available clearly emerges as the most positive aspect of visiting, with the range of shops, quality of the shopping centre and streets (including pedestrianisation) being highly rated.
- The overall cleanliness and tidiness of the city was a consistent source of low satisfaction, with this being attributed largely to the evening economy. Parts of Leeds city centre are noted to be in particularly poor condition, although recent improvements, such as that made to Briggate, were also noted.
- Public conveniences are important to groups using the city centre, yet current facilities are considered to be relatively poor by residents.

## 5. Profile of Respondents

Age	Combined %	Residents %	Visitors %	Workers %	Non-users %
16 - 17	3	1	8	5	1
18 - 24	12	5	26	25	9
25 - 34	15	13	14	26	6
35 - 44	19	19	18	19	19
45 - 54	16	17	16	14	17
55 - 64	16	19	10	9	24
65+	19	27	8	1	24
<b>Gender</b>					
Male	38	33	44	53	30%
Female	62	67	56	47	70
<b>Ethnicity</b>					
White British	90	91	90	89	0
White Irish	1	1	1	1	0
Any other White background	2	1	3	4	0
Mixed White and Black Caribbean	<1	<1	1	<1	0
Mixed White and Black African	<1	<1	0	0	0
Mixed White and Asian	<1	<1	0	0	0
Any other Mixed background	<1	<1	<1	1	0
Asian or Asian British Indian	1	1	1	<1	0
Asian or Asian British Pakistani	1	1	1	1	0
Asian or Asian British Bangladeshi	<1	<1	<1	0	0
Asian or Asian British Kashmiri	<1	<1	0	0	0
Any other Asian background	<1	<1	<1	1	0
Black or Black British Caribbean	<1	<1	<1	<1	0
Black or Black British African	1	1	<1	1	0
Any other Black background	<1		<1	<1	0
Chinese	<1	<1	<1	0	0
Any other background	1	1	<1	0	0
Refused	1	1	0	0	0

<b>Employment Status</b>	<b>Combined %</b>	<b>Residents %</b>	<b>Visitors %</b>	<b>Workers %</b>	<b>Non-users %</b>
<b>Employed full time</b>	36	36	0	0	0
<b>Employed part time</b>	14	14	0	0	0
<b>Unemployed</b>	4	4	0	0	0
<b>Permanently sick/registered disabled</b>	3	3	0	0	0
<b>Housewife/husband</b>	3	3	0	0	0
<b>Self employed</b>	4	4	0	0	0
<b>Full time student</b>	2	2	0	0	0
<b>Retired</b>	33	33	0	0	0
<b>Other</b>	2	2	0	0	0
<b>Marital Status</b>					
Married	54	54	0	0	0
In a civil partnership	3	3	0	0	0
Co-habiting	6	6	0	0	0
Single	27	27	0	0	0
Other	11	11	0	0	0
<b>Disability</b>					
Yes	9	11	5	4	0
No	91	89	95	96	0
<b>Tenure</b>					
Owner/occupier	73	73	0	0	0
Rented (Council)	14	14	0	0	0
Private rented	7	7%	0	0	0
With parents	3	3	0	0	0
Living rent free	<1	<1	0	0	0
Other social rented	2	2	0	0	0
Refused	1	1	0	0	0
<b>Adults in Household</b>					
None	<1	<1	0	0	0
One	28	28	0	0	0
Two	58	58	0	0	0
Three	10	10	0	0	0
Four	2	2	0	0	0
Five	<1	<1	0	0	0
Six	<1	<1	0	0	0
Don't know	<1	<1	0	0	0

<b>Adults in Household</b>					
None	70	70	0	0	0
One	13	13	0	0	0
Two	13	13	0	0	0
Three	3	3	0	0	0
Four	1	1	0	0	0
Five	<1	<1	0	0	0
Don't know	<1	<1	0	0	0
<b>Cars in household</b>					
None	22%	22%	0	0	0
One	48%	48%	0	0	0
Two	26%	26%	0	0	0
Three	3%	3%	0	0	0
Four	<1	<1	0	0	0
Five or more	<1	<1	0	0	0
Don't know	1%	1%	0	0	0