

## APPENDIX 7C: HEALTHCHECKS

### Introduction

**Farsley** is located approximately 8.4 km (5.2 miles) west of Leeds City Centre in Zone 10, Outer West. The main shopping units are located along Town Street.

### Stores Summary

	Number	%	District Centre Average %	National Average %
Convenience	8	11.4	8.9	7.61
Comparison	17	24.2	24.3	29.24
Service	27	38.5	50.6	47.1
Vacant	8	11.4	8.2	10.41
Miscellaneous	10	14.2	7.1	5.64
<b>Total</b>	<b>70</b>	<b>100</b>	<b>100</b>	<b>100</b>

Source: Leeds City Council Data, Centre Surveys 2010

### Retailer Representation and Services

Farsley is a relatively large district centre with the Co-Op acting as the anchor store. The centre is a linear form along Town Street and the primary shopping frontages are somewhat fragmented along the street due to the high number of services on the street.

The convenience offer in the centre is provided by the Co-Op, a large Local store and an independent butcher and bakers. A range of comparison goods are provided by independent retailers.

The town has a wide range of services including a building society, banks, pharmacy, a number of estate agents and a library. It lacks a health centre but includes a conservative club.

### Environmental Quality

The centre comprises old retail units at the ground floor levels of larger buildings. The centre has grown and expanded over time, resulting in its present linear form. The centre has a good environment, with two distinctive focal areas, the public realm area around St Andrews Square where there is evidence of planting and improvements to street furniture, and the area around the cenotaph which also has a pleasant environment.

The environmental quality around St Andrews Square has been enhanced, however, there is the potential for further improvement in the wider area.

## **Pedestrian Activity**

Pedestrian activity in the centre is relatively high, although movement through it is considered to be relatively poor, particularly movement between the St Andrews Square cluster of shops and the cenotaph cluster of shops.

## **Accessibility (Transport)**

Traffic within the centre is relatively high by virtue of Town Street being the main road through the area. There is a bus route along Town Street providing access to the wider area.

## **Car Parking**

Car parking in the centre is considered to be good with on-street parking available in parts.

## **Surrounding Uses**

The surrounding uses are residential.

## **Vacancy Levels and Average Rents**

Vacancy level in the centre are average and rents are estimated to be £12.50psf.

## **Centres Performance/Agent Perceptions**

Yields	<b>8%</b>
Example requirements from retailers	<b>No national requirements</b>
Suitable for modern retailing	<b>A small number of units suitable but most are too small and badly configured</b>
Centre expanding or contracting	<b>Expanding – new units on Paradise Street</b>
Centres performance	<b>Stable</b>
Future of centre	<b>Potential to expand</b>

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### Introduction

**Garforth** centre is located approximately 11.2 km (7 miles) east of Leeds City Centre in Zone 6, Outer East. The prime shopping street is Main Street.

### Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	10	9.71	8.9	7.61
Comparison	26	25.2	24.3	29.24
Service	50	48.5	50.6	47.1
Vacant	12	11.7	8.2	10.41
Miscellaneous	5	4.85	7.1	5.64
<b>Total</b>	<b>103</b>	<b>100</b>	<b>100</b>	<b>100</b>

	Sq ft net	%	National Average %
Convenience	17,100	12.3	11.48
Comparison	40,000	28.8	29.44
Service	61,500	44.3	43.6
Vacant	9,400	6.77	8.3
Miscellaneous	10,800	7.8	7.18
<b>Total</b>	<b>138800</b>	<b>100</b>	<b>100</b>

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

### Retailer Representation and Services

Garforth is a relatively large district centre anchored by the Co-Op.

The convenience offer in the centre is provided by the Co-Op, Sainsburys Local and Jack Fulton in addition to independent greengrocers. Comparison goods are provided by regional and local occupiers, including Select Clothing, a Card Warehouse and a factory outlet shop.

The centre has a good range of services including a library, public hall and social club in addition to retail services such as a Post Office, banks and estate agents. There are a number of cafes, restaurants and hot food takeaways in the centre.

### Environmental Quality

The centre comprises a mix of old and new units along the busy high street. The central part of the centre provides larger purpose built units with smaller units radiating outwards. It is considered that the centre has a good environment with flower tubs, bollards and street furniture provided outside the purpose built parade.

Whilst the centre has a linear form with a number of the services at the southern end and main shopping to the centre, the continuous retail frontages enhances the shopping environment.

### **Pedestrian Activity**

Pedestrian activity in the centre is high with movement across Main Street enabled by two zebra crossings. Movement throughout the centre is considered to be good with the medical centre and library located at the southern end and the main anchor stores and services to the north of these.

### **Accessibility (Transport)**

Traffic within the centre is relatively busy, although it is notable that traffic flows are perhaps better than in other centres, demonstrated through the provision of zebra crossings previously as opposed to pelican crossings. Bus routes are provided along Main Street providing access to the wider area.

### **Car Parking**

Car parking in the centre is considered to be good with restricted on-street parking in addition to two off-street car parks.

### **Surrounding Uses**

The surrounding uses in the area are residential.

### **Shopper Survey**

A survey of 100 shoppers was carried out in the centre in Summer 2010. 50% of respondents stated that the main reason for visiting the centre was to shop for goods, other reasons were to pay bills, visit the services and 9% worked in the centre. Average spend for respondents in the centre on all goods is estimated at approximately £13. The majority of shoppers, 82% bought convenience goods from the centre.

With regard to comparison goods only 11% of respondents stated that this was their main centre for non bulky comparison goods, 47% stated that Leeds City Centre was the main centre visited for comparison shopping. 13% of shoppers visited White Rose, and 8% visit York.

For bulky goods 11% of respondents stated they purchased these in Garforth. Other popular centres visited by respondents were Leeds City Centre 14% and Crown Point 11%.

Of all the shoppers interviewed, 90% stated they started their journey from home and a small majority 47% walked with 35% travelling to the centre by car. Only 8% of the respondents visited the centre by bus.

When asked their opinion of the centre the majority of shoppers 71% thought the shopping was about right. 77% of shoppers thought the layout of the centre is fine as it is with 21% stating it was too compact and could get congested at times. The supermarket, chemist, financial institutions and specialist food shops were identified as the most important shops in the centre.

When asked how the centre could be improved, 46% of respondents stated that more/ better toilets would improve the centre. 34% suggested better parking was

needed, 37% less traffic congestion and 29% would like to see improved leisure facilities.

## **Business Survey**

A business survey was carried out in Garforth town centre in Summer 2010, 20 retailers completed the survey, the majority of which were independent businesses under 1,000 sq ft in sales area.

Businesses that have been trading from Garforth town centre for over a year were asked to comment on their sales, turnover and profitability in the past 12 months. The responses confirmed that on average the sales, turnover and profitability of retailers within the centre have decreased and the majority of respondents stated that they considered this trend to remain static over the next 12 months.

When asked to comment on their business premises within the town centre, the majority of respondents considered their premises were average, although 20% considered they were very good.

In shopping terms, the majority of respondents, 70% considered that the market position of Garforth centre in shopping terms was good and the range and quality of goods available was also considered to be good.

Public transport services and pedestrian access were considered to be good 50% of respondents considered that the availability of parking was very poor.

When asked to rate the character and appearance of the centre, the results are inconclusive with a similar proportion of respondents stating these were good and very poor. A relatively large number of respondents, 44%, considered that the number of places to eat and drink in the centre was poor.

When asked to comment on the trading performance of the centre in the past five years, the majority of respondents considered that this had got worse, 95%. In addition, 85% of respondents considered that the number of vacant units was unacceptable.

In looking to the future, equal numbers of respondents considered additional retail floorspace would be good and bad for the centre. The majority of respondents considered that improved car parking, improved quality of retail units and better quality and range of retailers would improve the centre in the future.

## Vacancy Levels and Average Rents

Vacancy levels in the centre are average, rents are estimated to be £15psf.

## Centres Performance/Agent Perceptions

Yields	<b>8%</b>
Example requirements from retailers	<b>Subway and Betfred</b>
Suitable for modern retailing	<b>yes</b>
Centre expanding or contracting	<b>Static</b>
Centres performance	<b>Stable</b>
Future of centre	<b>Right sized</b>

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### Introduction

**Guiseley**, Otley Road is located approximately 13.2 km (8.2 miles) west of Leeds City Centre in Zone 8, Outer North West. The main shopping area stretches along Otley Road.

### Stores and Floorspace Summary

	Number	%	District Centre Average %	National Average %
Convenience	4	3.7	8.9	7.61
Comparison	24	22	24.3	29.24
Service	65	59.6	50.6	47.1
Vacant	4	3.7	8.2	10.41
Miscellaneous	12	11	7.1	5.64
<b>Total</b>	<b>109</b>	<b>100</b>	<b>100</b>	<b>100</b>

	Sq ft net	%	National Average %
Convenience	67,400	31	11.48
Comparison	51,000	23.5	29.44
Service	72,000	33.1	43.6
Vacant	4,400	2	8.3
Miscellaneous	22,500	10.35	7.18
<b>Total</b>	<b>217300</b>	<b>100</b>	<b>100</b>

Source: Experian Goad Centre Category Report 02/12/2009

### Retailer Representation and Services

Guiseley, Otley Road is a large centre, including the Guiseley Retail Park and additional retail units along the north side of Otley Road. The centre is anchored by a large Morrisons store and the retail park includes national occupiers such as Costa Coffee, M&S, and Pets at Home.

The convenience offer in the centre is provided by a large Morrisons store and also independent bakers and butchers on Otley Road.

Comparison goods are offered by national retailers, including Argos and Currys.

Services within the centre include a library and a leisure centre, in addition to retail services such as estate agents and banks on Otley Road.

The West Side Retail Park with Focus, Currys, Comet, Argos, Next and others lies to the south west of Leeds Road, but is not integrated with the town centre.

### **Environmental Quality**

Otley Road is a very busy route providing access from Otley and the north west into Leeds City Centre, creating a noisy and congested centre.

The Morrisons supermarket is set back from Otley Road with car parking in front, creating a dead frontage along much of Otley Road with independent shops located on the north side of Otley Road.

The footpaths on Otley Road are relatively narrow and therefore the centre lacks any street furniture. However, there is an area of public realm around the memorial in front of the Morrisons superstore.

### **Pedestrian Activity**

Pedestrian activity in the centre is relatively high, particularly along Otley Road. However, it is considered that movement within the wider centre is restricted, particularly pedestrian movement down to the retail park in the south of the centre.

### **Accessibility (Transport)**

Traffic through the centre is high with Otley Road being a main route into Leeds City Centre. Within the defined centre, traffic movements are also high by virtue of the large Morrisons car park and the car park and access into the retail park to the south.

### **Car Parking**

Car parking in the centre is good due to the large Morrisons car park and car park related with the retail park in the south, although both become congested at peak shopping times. Parking on Otley Road is limited with single yellow lines running the length of the road, although there are some small parking bays.

### **Surrounding Uses**

The surrounding uses in the area are residential and some industrial.

### **Vacancy Levels and Average Rents**

Following a visit to the centre in October 2010 CI estimate vacancy levels were estimated to be slightly higher than those recorded by Goad in the table above at nearer 10%. Average rents are estimated to be £18psf along Otley Road and £21psf within the retail park.



## Centres Performance/Agent Perceptions

Yields	7%
Example requirements from retailers	None
Suitable for modern retailing	Some areas – new units at Springhead Mills
Centre expanding or contracting	Static
Centres performance	Stable
Future of centre	Expand