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DEVELOPMENT PLAN PANEL

Meeting to be held in Civic Hall, Leeds, LS1 1UR on
Tuesday, 9th August, 2011
at 1.30 pm

MEMBERSHIP

Councillors

J Lewis	C Campbell	B Anderson	T Leadley
R Lewis	M Hamilton	C Fox	
K Mitchell			
E Nash			
N Taggart (Chair)			
N Walshaw			

Agenda compiled by:
Guy Close
Governance Services
Tel: 0113 24 74356

Head of Planning and Economic Policy:
David Feeney
Tel: 0113 24 74539

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A G E N D A

Item No	Ward	Item Not Open		Page No
1			**APPEALS AGAINST REFUSAL OF INSPECTION OF DOCUMENTS** To consider any appeals in accordance with Procedure Rule 25 of the Access to Information Rules (in the event of an Appeal the press and public will be excluded) (*In accordance with Procedure Rule 25, written notice of an appeal must be received by the Head of Governance Services at least 24 hours before the meeting)	
2			**EXEMPT INFORMATION - POSSIBLE EXCLUSION OF THE PRESS AND PUBLIC** 1 To highlight reports or appendices which officers have identified as containing exempt information, and where officers consider that the public interest in maintaining the exemption outweighs the public interest in disclosing the information, for the reasons outlined in the report. 2 To consider whether or not to accept the officers recommendation in respect of the above information. 3 If so, to formally pass the following resolution:- **RESOLVED –** That the press and public be excluded from the meeting during consideration of the following parts of the agenda designated as containing exempt information on the grounds that it is likely, in view of the nature of the business to be transacted or the nature of the proceedings, that if members of the press and public were present there would be disclosure to them of exempt information, as follows: **No exempt items or information have been identified on this agenda.**	

Item No	Ward	Item Not Open		Page No
3			**LATE ITEMS** To identify items which have been admitted to the agenda by the Chair for consideration. (The special circumstance shall be specified in the minutes).	
4			**DECLARATION OF INTERESTS** To declare any personal / prejudicial interests for the purpose of Section 81(3) of the Local Government Act 2000 and paragraphs 8 to 12 of the Members' Code of Conduct.	
5			**APOLOGIES FOR ABSENCE** To receive any apologies for absence.	
6			**MINUTES - 12TH JULY 2011** To approve as a correct record the minutes of the Development Plan Panel meeting held on 12th July 2011.	1 - 4
7	All Wards;		**LEEDS CITY CENTRE, TOWN AND LOCAL CENTRES STUDY** To receive and consider a report from the Director of City Development summarising the findings of Colliers International, who were commissioned to provide an up to date, comprehensive picture of current and future capacity for retailing and related town centre uses across the district and to project the future retail need.	5 - 34
8			**DATE AND TIME OF NEXT MEETING** To note that the next meeting will be held on Tuesday, 6th September 2011 at 1.30 pm.	

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Development Plan Panel

Tuesday, 12th July, 2011

PRESENT: Councillor N Taggart in the Chair

Councillors B Anderson, C Campbell, C Fox, M Hamilton, T Leadley, R Lewis, K Mitchell, E Nash and N Walshaw

50 Chair's Opening Remarks
The Chair welcomed all in attendance to the first Development Plan Panel meeting of the new municipal year.

51 Declarations of Interests
There were no declarations of interest.

52 Apologies for Absence
An apology for absence was submitted by Councillor James Lewis.

53 Minutes - 8th March 2011
An amendment to Minute No. 48 to replace 'Holbeck' with 'Hunslet' was agreed as follows:

'Regarding wharves and rail sidings, Officers reported an objection from British Waterways in respect of the Old Mill Lane site at Hunslet …'

RESOLVED – That subject to the above amendment, the minutes of the meeting held on 8^{th} March 2011 be approved as a correct record.

54 Leeds' Needs and Opportunities Assessment for Open Space, Sport and Recreation
The Director of City Development submitted a report which briefed Members on the outcomes of the key findings of the PPG17 Assessment of Needs and Opportunities.

The Chair welcomed to the meeting, David Feeney, Head of Planning and Economic Policy and Chris Bolam, Principal Planner, City Development, to present the report and respond to Members' questions and comments.

A PowerPoint presentation was provided focusing on the following key areas:

- Comparing PPG17 and UDP Green Space Standards
- Existing provision ratio based on 2008 population
- Application of Quantity Standards to highlight deficits by analysis area
- PPG17 Green Space Standards applied to an example development
- PPG17 Green Space Standards applied to the locality of a development site
- Other key issues, particularly introduction of the Community Infrastructure Levy (CIL) in 2014

- Next Steps, with particular emphasis on feedback to stakeholders and LDF policy preparation.

The Chair then invited questions and comments and in brief summary, the key areas of discussion were:

- Clarification that the Harewood Estate was included in the study.
- Concern in relation to applying accessibility standards, particularly in relation to crossover of boundaries into neighbouring authorities.
- Clarification whether cleared sites were safeguarded as open, e.g. Bandstead Park, Harehills. It was advised that Members had protected this land from development.
- Confirmation that cemeteries, particularly, St George's Field at the university and Beckett Street cemetery were not counted in amenity standard.
- Issues in relation to bowling greens counting towards outdoor sports provision, especially as they were not always readily accessible to members of the public.
- Issues in relation to evaluation and consideration of Ralph Thoresby and other education recreation provision and their availability to the public. The Chair agreed to raise this issue with Councillor Blake, Executive Member (Children's Services).
- Concern about perceived over-provision of pools, especially since some pools were primarily for education use.
- Confirmation that some allotments were controlled by the local authority and some by the parish council. Where there was a parish or town council, they were the allotment authority. It was advised that statutory allotments were already protected through legislation, but that private, non-statutory allotments also required protection through the planning system. In relation to on site provision of allotments, it was reported that this could also be achieved through CIL.
- Concern about the quantity standard for equipped play areas and recognition of the need to apply quantitative, accessibility and qualitative green space standards together.
- Concern that the imbalance of play provision was development led. It was advised that it had also been demographically led – historically facilities had been provided in areas with a high proportion of children, but the families had stayed there resulting in older populations with facilities that they no longer used.
- Concern that accessibility standards did not take account of differences in public transport provision.
- The need to ensure processes were in place to develop existing play provision as opposed to over-reliance of new developments.
- Access to amenity space in outer areas, particularly footpaths, etc. It was advised that footpaths were not a suitable alternative to amenity space and it was the function of the space that was most important.
- The need for Members to be provided with a definitive list of footpaths in Leeds. The Chair agreed to raise this issue with Councillor Ogilvie, Executive Member (Leisure Services).

RESOLVED –

(a) Notes the completion of the Leeds PPG17 Assessment of Needs and Opportunities study
(b) Notes the implications of the proposed standards on new development proposals
(c) Supports the delivery of a feedback exercise to update stakeholders on the preparation of the study and its content with the specific aim of gathering key partner understanding and support for the action points, identification of additional resources and implementation of the stuffy recommendations outlined in Chapter 13 of the draft document.

(Councillor Richard Lewis joined the meeting at 1.43 pm.)

(Councillor Leadley left the meeting at 2.48 pm and Councillor Hamilton at 2.52 pm during the consideration of this item.)

55 Date and Time of Next Meeting
Tuesday, 9th August 2011 at 1.30 pm.

(The meeting concluded at 3.10 pm.)

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Agenda Item 7

Originator:	Sue Speak
Tel:	2478079

Report of the Director of City Development

Development Plan Panel

Date: 9 August 2011

Subject: Leeds City Centre, Town and Local Centres Study

Electoral Wards Affected:	**Specific Implications For:**	
All	Equality and Diversity	√
	Community Cohesion	√
	Narrowing the Gap	√

EXECUTIVE SUMMARY

The city council commissioned Colliers International to provide an up to date, picture of current and future capacity for retailing and other town centre uses across the district, and to project the future retail need. The study was also required to assess the existing hierarchy of designated centres in the Leeds district in terms of their function and effectiveness, and examine the emerging Core Strategy proposed hierarchy.

The Study provides a basis to develop appropriate planning policy approaches for town centres and main “town centre uses”, which include retail, leisure, offices, arts, tourism and cultural activities. This report summarises Colliers findings and indicates that the role of Leeds city centre in the regional shopping hierarchy is not at risk and its status as the major centre in employment terms is secure. It is not considered that further allocations beyond those already committed are needed at this time, given significant commitments for both retail and leisure in the city centre.

There is no strategic need to identify new sites for office development beyond those already identified in the Employment Land Review, but small scale opportunities should be considered within and on the edge of town centres to meet the needs of local small businesses. The retail need for convenience goods within the district up to 2016 is estimated at 19,626 sqm. net and 135,576sq.m for comparison goods

The town and local centre hierarchy is examined and recommendations made regarding the status of existing and proposed town and local centres together with the need to consider development opportunities within or adjacent to specific centres.

1.0 PURPOSE OF THIS REPORT

1.1 Members will recall that as part of the evidence base for the LDF, Colliers International were commissioned to provide an up to date, comprehensive picture of current and future capacity for retailing and related town centre uses across the district, and to project the future retail need. The study was also required to assess the existing hierarchy of designated centres in the Leeds district in terms of their function and effectiveness, examine the proposed hierarchy within the emerging Core Strategy and identify any gaps within the provision of retail and related town centre uses. This report summarises Colliers findings.

2.0 BACKGROUND INFORMATION

Study Objectives

2.1 The objectives of the study were to:

- Contribute towards the evidence base to support the LDF, and assist in determining planning applications.
- Provide a quantitative and qualitative assessment of the need for new floorspace for comparison goods, convenience goods and leisure developments up to 2016. The consultants were asked to include an assessment of net 'leakage' of retail expenditure from Leeds to competing retail centres, catalogue shopping, and internet shopping.
- Assess the appropriate level of retail and leisure floorspace needed to support the Core Strategy growth proposals including consideration of city centre requirements up to 2026.
- Undertake a 'health check' on the vitality and viability of the city centre and town centres in accordance with the advice set out in PPS4 (Planning for Sustainable Economic Growth). This was to include an evaluation of whether centres are performing well, functioning adequately, performing poorly or are "at risk".
- Assess the ability to meet identified need, within the city, town and local centres based on pipeline development and assessment of capacity available.
- Advise on the need to expand or contract centres within the district based on Core Strategy proposals.
- Advise on the need for new centres, to support any identified gaps in the retail hierarchy and provide an indication of the catchment area for different levels of the hierarchy for comparison and convenience goods.
- Provide a view on the centres hierarchy and planning policy for centres outlined in the Core Strategy Preferred Approach and recommend where changes would be appropriate.
- Provide a market view on retailer representation, including independent retailers and market facilities; retailer demand; rental values within centres and key retail trends relevant to the Leeds district. In this context a market view was requested on the appropriate scale and function of Kirkgate market in Leeds city centre.
- Confirm or suggest modifications to the appropriate boundaries of the city centre and town centres in the Leeds district identified by Leeds city council, and advise on appropriate local centre boundaries. Identified boundaries are intended to inform the Site Allocations DPD and will be used as a material consideration in determining planning applications.

- Advise on whether a lower impact assessment threshold is appropriate for the scale of edge of centre and out of centre development (as suggested in PPS4 EC1d).
- Provide input into defining any locally important impacts on centres (as advised in PPS4 EC31e)

Policy background

2.2 The current local Development Plan retail and town centre policies in Leeds are set out in the Leeds Unitary Development Plan (UDP) Review 2006. These were in effect generally unchanged from the original Leeds UDP adopted in August 2001, and are based on survey analysis and a national policy context dating from the late 1980's and early 1990's.

2.3 However, the UDP policies have retained a broad consistency with the general thrust of national policies and UDP proposals have supported the development of new facilities in areas where deficiencies in shopping provision for particular communities had been identified.

2.4 The preparation of the LDF, however, requires the re-assessment of policy against an up to date evidence base. In order to underpin the study an extensive household survey, was carried out together with supporting street surveys of shoppers and surveys of businesses This survey information was used to forecast future needs, together with population projections (based on the Strategic Housing Market Area Assessment SHMAA), and standard retail and expenditure projections All this information was then used to provide an assessment of current circumstances, potential future requirements and suggestions on appropriate strategy development.

2.5 The consultants findings take account of current economic and retailing circumstances. There are clear uncertainties over short term prospects and potentially longer term uncertainties over prospects for retail generally and high streets in particular. Colliers consider the scope to meet significant needs by bringing forward the development of new 'town centres' must be questionable given limited potential for public sector investment in key constituents of the overall town centre offer. Their advice is based on "a relatively cautious approach", reflecting PPS4 national planning policy guidance as currently stated.

3.0 MAIN ISSUES

Leeds city centre retail and leisure context

3.1 Leeds city centre is not only the main centre within Leeds, but also across a wide region. This relates not only to its shopping function but also to its status as a major regional office centre. Comparisons with other major centres confirm this. Leeds city centre floorspace within the Primary Shopping Quarter is estimated at approximately 350,000sq.metres (3.7million sqft). This compares with:

- Harrogate 140,000sqm (1.5m sqft)
- York 186,000sqm (2m sqft)
- Wakefield 165,000sqm (1.57m sqft)
- Huddersfield 185,000sqm (2m sqft)

- Bradford 185,000sqm (2m sqft)
- Halifax 130,000sqm (1.4msq.ft)

3.2 Colliers has undertaken a healthcheck of Leeds city centre which looks at aspects which include rental levels, vacancies, and commercial yields. In recent years the city centre has seen a decline in rental levels due to both the wider economic downturn, but also due to retailers awaiting the completion of Trinity Leeds in 2013 which will provide new units and create churn in the centre. In 2002 retail rental levels were £270 per sq.ft, rising to £310 in 2005, until 2009 when levels dropped to £260 per sq.ft.(Source: Focus April 2011).

3.3 In terms of vacant property Experian Goad figures indicate 241 units in the city centre providing 477,300 sq.ft of vacant floorspace in April 2009. These levels are higher than the national average, with the number of vacant units comprising 18.5% of the total, compared to a national average of 10.4%. With regard to floorspace this equates to 12.6% of city centre floorspace being vacant compared to the national average of 8.3%. Although these vacancy levels seem relatively high, the 2009 report contains a number of units that were undergoing refurbishment at the time. These have now been renovated and reopened, notable examples being the Corn Exchange, The Core and units affected by the refurbishment of Trinity Leeds. As a consequence vacancies recorded in 2009 are anticipated to be higher than currently exist.

3.4 Commercial yields are based on the evidence of property transactions. The level of yield (expressed as a percentage) broadly represents the markets evaluation of the risk and return attached to the income from a property. Broadly speaking, low yields indicate that investors believe a town is attractive and as a result, is more likely to attract investment than a town with high yields. The VOA Property Market Report, July 2008 provides yield data for Yorkshire and the Humber. Yields for 2008 in Leeds are recorded at 4.75%. This compares well with other centres within the region, with Harrogate and York recorded at 5.75%, Wakefield 6.75% Huddersfield and Bradford 7%, and Halifax 7.5%. Colliers estimate that the yield for Leeds is now at around 5%, however, this is still relatively low and is considered to reflect a centre that is performing well.

3.5 Taking into account recent and emerging proposals within other major city and town centres such as Wakefield and Bradford the consultants are confident in concluding that the role of Leeds City Centre in the regional shopping hierarchy is not at risk and its status as the major centre in employment terms is secure. This is not only evidenced by current facilities and its role as an employment centre, but also by developments underway and schemes being promoted. In particular, the well progressed Trinity Leeds scheme (providing 32,700 sq.metres (352,000sq.ft) of floorspace) and the Leeds Arena will each address some of the main deficiencies when compared with other regional centres. The proposals for the Eastgate Quarter 130,000sqm (1.4m sq ft) will provide, further retail space of the type that the city has been lacking.

3.6 Given the significant commitments for both retail and leisure in the city centre, it is not considered that further allocations or specific proposals need to be made at this time. Clearly, the need to produce annual monitoring reports to review Development Plans will result in on-going reassessment, but given the scale of schemes under construction and permitted, it is considered that the city centre will undergo some years of readjustment and consolidation and any further significant development or strategies should emerge after that period. This does not in any way preclude the reconfiguring and remodelling of existing floorspace and proposals to modernise and improve space and facilities should be encouraged. However, the UDP Shopping Quarter will accommodate this significant committed growth and no expansion of it is considered necessary. The defined City Centre retains scope for additional office development but delivery and take up will also need to be monitored to assess need for further allocations given the strengthened PPS4 advice on the location of office development.

3.7 Cultural and leisure facilities have also experienced significant recent improvements and on-going developments respectively. The City Museum has a new home providing hugely improved facilities over those offered previously in the converted former Civic Theatre, while the Grand Theatre has had extensive remodelling and refurbishment which allow it to continue to accommodate not only high quality drama but also facilities for music and dance. The provision of modern and permanent homes for dance and music at Quarry Hill, have supplemented this. The city has been notable for its lack of a major performance venue for many years but the development of Leeds Arena will remedy this deficiency.

Kirkgate Markets

3.8 Colliers were asked to provide a market view on Kirkgate Markets. However, since starting the study the city council embarked on more specific investigations of costs, issues and opportunities relating to the Markets and consequently only a broad view has been requested. Colliers note that Kirkgate Markets are clearly an important landmark and provide a distinctive retail offer within the city. The historic fabric of the covered market warrants retention in its own right and the front market hall (the 1904 building) is spectacular both internally and externally. Maintenance and suitability are clearly significant issues for the council.

3.9 The open market area has been diversified to accommodate a variety of activities and this seems well attended generally by traders and shoppers. However, between the historic building and the open market are the utilitarian buildings which were erected following a fire. Colliers overall impression is that the indoor market provides more space than is required by both businesses and shoppers. This area might provide the opportunity for more radical intervention, particularly when Eastgate development progresses. This can be expected to fundamentally change the character of the area, bringing surface car parking into economic use and generally improving retail space. The city is expected to undergo a period of readjustment and pedestrian flows will be changed significantly. The opportunities that arise from this change could support such an approach in the future.

Leeds Office Market

3.10 Leeds City centre office market now operates in four zones; City Core, Greater Core, East Quarter and Southern Gateway. Headline rents across the city centre are £27per sqft, average rents across all grades are £18 per sqft. The city core has suffered the most in respect of the recession with an estimated 28,000 sqm (301,000 sqft) of floorspace being vacated between 2008 and 2010 across all grades of office space. This is partly due to the Core area being occupied by a large majority of financial and business service sectors which have been hard hit by the recession. The area has also seen a large amount of redevelopment with new floorspace coming on to the market, which has distorted the figures. At the end of 2010 Leeds City Centre had 200,097sq m (2.15m sqft) available for rent.

3.11 In addition to the city centre 817,000 sqm (8.8m sq.ft) of out of centre business and office parks has been developed over the last 15 years. Headline rents within the business parks are cheaper than the city centre at £18.50 per sq ft with an average across all grades at £12.70 per sq.ft. Despite this Colliers indicate that most businesses want city centre or city fringe locations which are more accessible to staff and clients.

Policy approach

3.12 The key national policy is PPS4 which seeks to return new economic development (including offices) to designated town centres and move away from the trend of out-of-centre development. The policy promotes the sequential approach aiming for in-centre development followed by edge-of-centre locations. If no centre or edge-of-centre sites are available, only then can out-of –centre sites be considered.

3.13 The Core Strategy Preferred Approach(CSPA) broadly reflects the aims of PPS4 and the sequential approach and promotes the city centre as the focus for major new office development. Existing out-of-centre permissions which lapse will be considered against the sequential approach in PPS4. The CSPA takes on board the floorspace development targets set out in the Regional Spatial Strategy, advising that 550,000sqm be provided within the city centre and 50,000sqm within other defined centres between 2008 and 2026. Subsequently, the Council's own Employment Land Review (ELR)(March 2011) now identifies a requirement for the provision of 805,000sqm of office floorspace to 2026 based on regional economic model forecasts of employment growth in the City Region. The ELR identifies 950,000sqm of office floorspace to meet the employment requirements of the city to 2026, based on sites with extant planning permission. Approximately 52% of the identified supply is located within the city centre and 45% in out-of-centre locations. Only 2% are situated in edge of centre locations and just 0.5% are situated in other designated town centres.

3.14 The ELR concludes that on the basis of the requirement there is no strategic need to identify new sites for office development and sites with extant permission which provide a least a ten year supply of 645,000sq.m (7m sqft) should be identified on the Proposals Map.

3.15 In summary given that existing supply is sufficient to meet the identified requirement for office floorspace to 2026, development will continue in a similar manner as achieved through the current UDP, although with more emphasis on new development within the city centre. There appears to be limited opportunity for new office development within existing defined centres, although the ELR currently only looks at sites with an area of 0.4ha or greater and many town centre sites are likely to be smaller. It is proposed to review this size threshold and include sites above 0.2ha. In addition through the Site Allocations Development Plan Document further opportunities for office development will be sought within and on the edge of the defined town and local centres. It is therefore likely that small office opportunities will arise in association with these centres which are likely to meet the needs of local small businesses.

Centres Hierarchy

3.16 The pattern of centres in Leeds is generally a consequence of historical growth of the main urban area and outlying towns. As the nature of retail provision and shopper expectations has changed, then the ability of centres to perform the role expected of them has changed. An important element of the Study is to identify deficiencies and needs and the capacity for meeting those needs. Consequently an assessment of how centres are performing through analysis of a household survey, shopper and business surveys is particularly important.

Town Centres

3.17 Colliers have reviewed the existing and proposed lists suggested through the Core Strategy Preferred Approach (CSPA) shown in Appendix 1. Appendix 2 gives a full list of town and local centres recommended for inclusion in the Core Strategy. The hierarchy now proposed consists of the city centre, 29 town centres and 38 local centres. They have confirmed agreement to most of the town centre designations, but on the basis of a healthcheck assessment, and market information (Appendix 3) have recommended that certain centres should be downgraded to local centre status, based on their ability to meet weekly shopping needs and the range of facilities they provide.

3.18 The Study suggests a two-tier approach to local centres, recognising that there can be significant differences in scale and function of centres. Centres which they consider which should be regarded as local centres instead of town centres, are Boston Spa, Harehills Corner and Kippax. In addition to these, Moortown Corner was put forward as a town centre in the CSPA but the consultants consider it should remain as a local centre, however, they concur with proposals to designate Harehills Lane, and land at All Saints/Great Clothes, Richmond Hill as town centres.

3.19 The role of Dewsbury Road within the hierarchy is considered to be significantly dependant on the identification of development opportunities. If such centres cannot be shown to be operating at an appropriate level, then the consultants view is that their place within the hierarchy should be adjusted accordingly.

3.20 A number of other centres do not perform as major locations for weekly shopping needs, mainly due to the absence of a major foodstore, however, they continue to provide other town centre facilities or operate as very much a focus for specific local communities. Armley, Farsley, Chapel Allerton, Cross Gates and Headingley are noted in this respect, but it is concluded that given that town centre status should reflect the overall role of centres, there is no need to redefine them. Colliers suggest that it would be appropriate for Site Allocations DPD to consider whether there are appropriate development opportunities within or more likely on the edge of these centres to accommodate new foodstore developments to add to the functions of these centres. They note that this will not always be possible, because of physical constraints, commercial prospect of delivery, or the presence of existing freestanding stores in the local area.

3.21 There are also centres based on large foodstores which might be considered either limited or outdated. Holt Park and Horsforth are given as examples. It is recommended that the need and scope to revitalise these centres through refurbishment or redevelopment is discussed with relevant retailers.

Local Centres

3.22 Local centres put forward in the CSPA have been assessed and advice given on appropriate boundaries, (see list in Appendix 1). It should be noted that while the Core Strategy will identify the locations of Local centres, precise boundaries will be a matter for the Site allocations DPD.

3.23 Colliers suggest that this level of the hierarchy should be separated into large local centres and small local centres on the basis that there are clear differences in scale among the local centres. Large local centres can provide for developments at an appropriate scale to meet local convenience needs, or there may be potential opportunity within them, or on their edges. Even some of the smaller local centres are defined to incorporate properties which may provide opportunity for redevelopment which could accommodate more up to date convenience store opportunities.

3.24 Where there are gaps in convenience food provision within the hierarchy which would result in facilities not being within walking distance of communities, and where opportunities do not exist within centres, it is considered that it may be a sustainable approach to provide stores up to 372sq m [4,000 sq ft] to meet basic day to day needs.

Retail Need Assessment

3.25 A major objective of the study is to estimate the need for additional **retail** floorspace within Leeds District through to 2026. The assessment has been undertaken for the two main categories of retailing – convenience goods and comparison goods. The area studied is shown on Plan 1. This is the area from which most of the retail expenditure in the district is seen to derive and is consequently the area for which a household survey was undertaken to establish the current pattern of shopping activity. The household survey is the foundation upon which retail need estimates are built.

3.26 A traditional approach to estimating retail floorspace need has been followed. The need for additional retail floorspace within a centre is dependent on the relationship between the demand for and the supply of space. The demand for floorspace is determined by assessing the likely growth in the volume of consumer retail expenditure within an area taking into account population growth. An assessment of floorspace supply involves quantifying existing supply and the extent to which proposed changes in the location, quality and quantity of retail floorspace will meet the forecast increases in expenditure. Any monetary shortfall of supply relative to demand, in the future, indicates there is the need for more retail floorspace in quantitative terms.

3.27 The scale of additional retail provision is then determined by converting any excess of consumer expenditure (assessed through detailed survey) into a retail floorspace need by applying appropriate sales densities. It should be noted that the estimates make deductions to allow for "special forms of trading" e.g internet shopping.

3.28 Estimates of retail need for convenience goods, non- bulky and bulky comparison goods have been provided for 10 geographic zones within the Leeds district for 2016, 2021 and 2026 based on two scenarios for population projections supplied by the city council. The lower scenario reflects the projections used for the SHMAA. The retail need figures derived from this are considered to represent a more realistic approach to retail need. This is on the basis that there is uncertainty about levels of population growth and clear uncertainties about retail prospects in the short term and difficulty in forecasting retail growth beyond five years.

3.29 The methodology assumes that the market share of the Leeds retail economy will remain constant through to the end date of 2026. This is a standard starting point for analysis, referenced in PPS4, however, PPS4 makes clear that where considered appropriate or necessary, policy can be devised to develop a strategy to change market shares to reduce polarisation into higher order centres and/or ensure delivery of additional development to meet particular needs more sustainably. Consequently the retail need outcomes provide the basis for policy development and should not be taken to confirm definitive requirements for new retail development at various locations.

3.30 Retail need estimates are shown in Tables 1 and 2, Appendix 4 at 2016, 2021 and 2026 for convenience goods and comparison goods. In terms of convenience goods the retail need for the Leeds district in 2016 is estimated to be 19,626 sq.m net, rising to 41,515,sq.m in 2026. For comparison goods the need is anticipated to be 135,576 sq.m in 2016 rising to 178,201 sq.m in 2026. Although estimates have been carried out for 2021 and 2026, Colliers consider that the retail strategy for the LDF should be focussed on potential retail floorspace at 2016. This is because a cautious approach should underpin the assessment not only because of current economic conditions, but because the growth in expenditure and consequent floorspace needs arises to a significant extent from forecasts of population growth as previously referred to in paragraph 3.26 above. Issues relating to retail need in respect of the impact on centres are discussed below and highlighted in Appendix 4.

Issues arising from retail need estimates

Comparison shopping in Leeds city centre

3.31 The household survey highlights that the dominant centres within Leeds for comparison shopping are the city centre attracting 59% of spend on non-bulky comparison goods and White Rose attracting 20.4%.

3.32 The need for floorspace to 2016 is calculated to be 24,404 sq.m net. The capacity assessment takes Trinity and Eastgate as commitments. In light of these developments it is not considered imperative to plan for further expansion of the city centre at the present time, despite the market share indications of capacity. The two schemes, individually and certainly cumulatively, will result in restructuring and re-organisation of retailers and other operators in the city centre. The experience of past schemes, such as the Bond Street Centre, has demonstrated that in the assimilation of new development, retailer relocations occur, to take advantage of the most modern quality retail space and the re-occupation of the resulting space, can take some time. It is therefore considered unlikely that developers would feel confident enough to bring forward any significant development in addition to Trinity and Eastgate until both of those schemes have been developed and established their trading position within the city centre. It is however, reasonable to assume that there will be scope for and opportunities to remodel existing floorspace as the development of the former Lewis/ Allders and the remodelling of the Headrow shopping centre to form The Core have demonstrated. This may be particularly the case as retailers relocate into the new developments and existing landlords seek to modernise their space to meet particular requirements.

White Rose

3.33 Comparison shopping facilities in Leeds are clearly dominated by Leeds City Centre, but White Rose also provides significant floorspace. Furthermore the assessment of retail need apportions a further 100,012 sq.m net to the Outer South zone, which is essentially White Rose. This raises issues; White Rose is not a defined centre and lacks the range of facilities and character which would enable it to become designated as one.

3.34 The quantitative assessment is based on the market share approach which is acknowledged as appropriate in Government guidance. However, this approach as its name suggests, simply projects existing market shares forward. This can mean that the most significant centres or retail destinations will become increasingly more dominant. The extent to which this is desirable and whether and how adjustments should be made is a matter of policy consideration. In Colliers view, given national guidance, the currently extant RSS and Leeds' own policy, together with the aims and objectives relating to town centres in neighbouring Districts, there is no case for supporting additional development at White Rose.

3.35 Furthermore, Colliers assessments were made at a time when Trinity Walk in Wakefield was still under development, but that has now opened and the aspiration is that it will clawback significant trade to Wakefield city centre (currently lost to White Rose). The long stalled Westfield development in Bradford is remerging and it would clearly be contrary to an overall strategy for development at White Rose to prejudice the possible development of this significant regeneration scheme. In addition, as stated previously, Leeds city centre has new development underway. While new proposals are emerging it would be inappropriate for development to take place at White Rose which might deter investment in committed city centre schemes, as well as denying trade to established town centres within Leeds and elsewhere.

Other Leeds Centres

3.36 Other centres within Leeds are less significant in terms of comparison shopping, however, it is considered that proposals for additional comparison goods floorspace within or on the edge of defined town centres should be supported, particularly within Inner and Outer South and Inner and Outer West zones to absorb the significant market share capacity related to White Rose.

Convenience Shopping

3.37 The town centre hierarchy is related significantly to the pattern of shopping for main convenience goods needs. This should not be the sole criterion for 'town centre' status, but it is a consideration which carries weight. Main convenience shopping needs in Leeds are met in a number of ways. They range from:

1. Relatively large stores accommodated within or on the edge of long established centres.
2. More recent developments based on relatively large foodstores, some of which clearly meet town centre definitions, but others where there is some compromise and others which are simply shopping destinations.
3. Centres which incorporate relatively large foodstores, albeit these may be somewhat dated.
4. Freestanding stores.

3.38 There are relatively few freestanding stores in Leeds, albeit a large number of foodstore developments have taken place on the edge of centres, as centre redevelopments or where centre upgrades have been identified as appropriate response to meeting needs.

3.39 The quantitative analysis shows that there are a number of centres where overtrading is taking place and there are other opportunities where expected population growth might justify new provision. More generally, it is considered that there is scope to enhance accessibility through facilities for everyday shopping needs without requiring development of a scale which could prejudice town centres or incorporate the sale of a range of goods which would be expected at such town centres.

3.40 The key conclusions relating to meeting convenience shopping needs are as follows:

1. Investigations should be made to attempt to identify opportunities for relatively large store developments to meet specific deficiencies particularly where centres have not developed as expected. These centres are most notably Dewsbury Road, but also include Chapel Allerton, Cross Gates and Farsley. In addition, the scope for new town centres or significant foodstore development in Inner East Leeds such as the proposal at All Saints/Great Clothes, Richmond Hill should be considered further.

2. The position at Armley should be monitored closely and if the current proposals are not delivered, then alternatives will need to be investigated, including scope for the consideration of a new centre in Inner West around Stonebridge Mills, Wortley.

3. Requirements relating to potential significant population growth should also be investigated, although the timescales within which that population growth is likely suggests that these are not urgent.

4. The scope for redevelopment, refurbishment or improvement of stores anchoring established town centres should be explored with operators, and the local authority should adopt a pro-active approach to delivering improvements. There are sectors of Leeds where assessments indicate that existing centres, or more accurately, stores, are overtrading. Town centres as the preferred locations to address such needs and the city council will need to identify opportunities for retail development.

5. It is considered that opportunities for stores selling convenience goods up to, say, 1,858 sq metres gross (20,000 sq ft) could remedy particular deficiencies. These would best be associated with large local centres but particular circumstances might allow greater flexibility. Colliers advise the local planning authority to

engage with retailers to investigate this potential prior to introducing it as a policy initiative. The matters to address with retailers might include:

- the appropriate size threshold;
- need to limit the range of goods to be sold to address convenience shopping needs in a sustainable manner;
- consideration of sectors of Leeds where this approach would assist in meeting needs in accordance with the principles of sustainable development.

3.41 PPS4 suggests that planning authorities consider any "locally important considerations". Colliers suggest that any planning application which would increase floorspace in any defined centre by 10% should be subject to assessment. The 10% figure is a guide and current consumer expenditure expectations might justify a lower figure.

3.42 PPS4 suggests a threshold of 2,500 sq metres gross for assessment of impacts for proposals out of centre and not identified in a development plan. Given the suggestion that there may be opportunities for smaller stores to meet identified convenience shopping needs Colliers advise that a lower threshold of 1,500 sq metres gross would be appropriate. The PPS4 thresholds are however, considered appropriate for non-food and leisure proposals.

4.0 Implications for Council Policy and Governance

4.1 PPS4 "Planning for Sustainable Economic Growth" requires local authorities to assess the detailed need for land or floorspace for all main town centre uses within their Local Development Framework's and identify any deficiencies in terms of capacity and supply within the Plan period. The Leeds city centre, town and local centres study, forms part of the evidence base for the LDF. Once adopted the LDF will form part of the Development Plan for Leeds. It has been necessary to undertake this work in order to justify the council's future approach to development within the city, town and local centres.

5.0 Legal and Resource Implications

5.1 The LDF is being prepared within the context of the LDF Regulations and statutory requirements. Once adopted, the LDF, will be the development plan for Leeds and will need to be consistent with corporate objectives of the community strategy. Preparing evidence for the council's emerging LDF is time consuming and resource intensive.

6.0 Conclusions

6.1 This report has provided information on Leeds city centre, town and local centres study which will inform policy within the LDF. The main conclusions of the report are that:

- the role of Leeds city centre in the regional shopping hierarchy is not at risk and its status as the major centre in employment terms is secure.

- given significant commitments for both retail and leisure in the city centre it is not considered that further allocations beyond those already committed are needed at this time.

- there is no strategic need to identify new sites for development beyond those already identified in the Employment Land Review, but small scale opportunities will be sought within and on the edge of town centres to meet the needs of local small businesses.

- the town centre status of Boston Spa, Harehills Corner and Kippax should be reconsidered and they should now be regarded as local centres.

- Harehills Lane, All Saints/Great Clothes, Richmond Hill should be designated as town centres

- requirements relating to any significant areas of population growth will need to be investigated

- the council should consider whether appropriate development opportunities are available within or on the edge of Dewsbury Road, Farsley, Chapel Allerton Cross Gates, and Headingley to improve the weekly shopping function of these centres

- the scope to revitalise the large outdated foodstores within Holt Park and Horsforth should be discussed with relevant retailers.

- the retail need for convenience goods within the district up to 2016 is estimated at 19,626 sqm. net and 135,576sq.m for comparison goods

7.0 Recommendations

7.1 Development Plan Panel are requested to note and comment on the contents of this report.

Background Papers

Leeds city centre, town and local centres study: Carried out on behalf of Leeds city council by Colliers International.

Leeds Settlement Hierarchy

Leeds Main Urban Area

Major Settlements

- Boston Spa
- Garforth
- Guiseley/Yeadon
- Kippax
- Morley
- Otley
- Rothwell
- Wetherby

Smaller Settlements

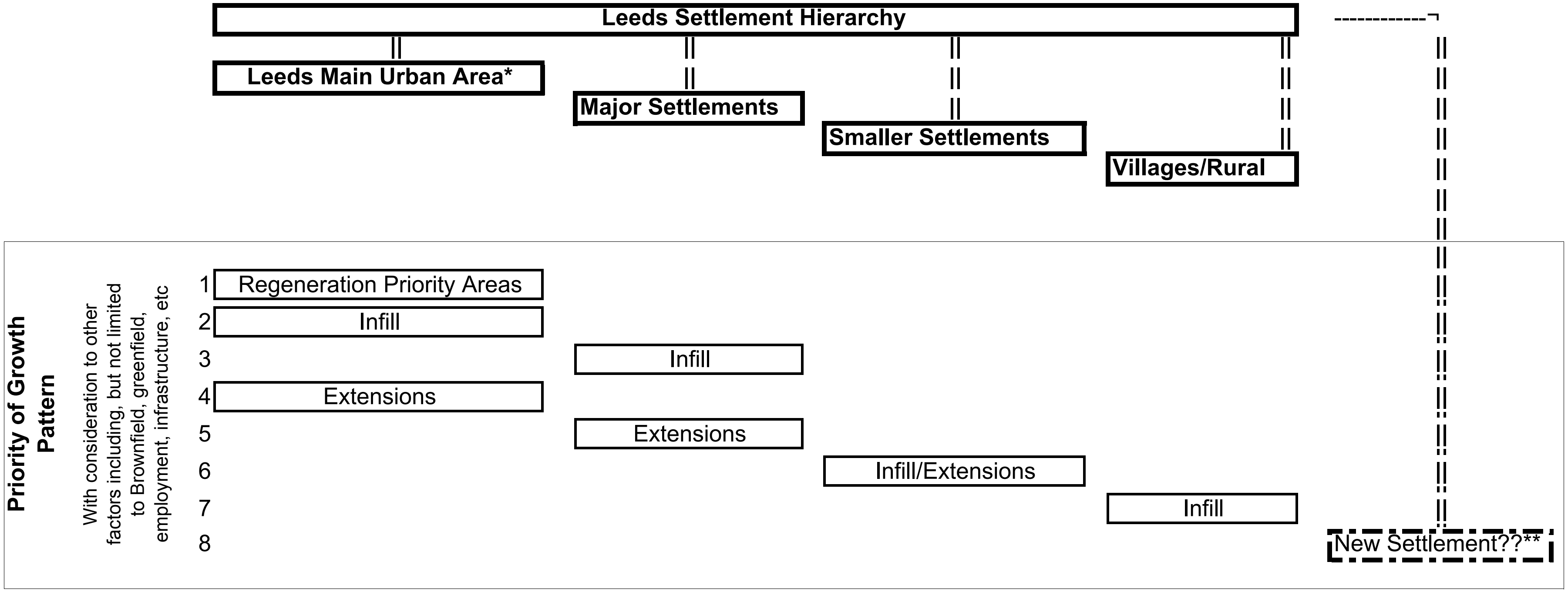
- Allerton Bywater
- Bardsey
- Barwick-in-Elmet
- Bramham
- Bramhope
- Calverley
- Collingham
- Drighlington
- East Ardsley
- Gildersome
- Lofthouse/Robin Hood
- Micklefield
- Mickletown methley
- Pool-inWharfedale
- Scholes
- Swillington
- Tingley/West Ardsley

Villages/Rural

Leeds Settlement Hierarchy

- **Leeds Main Urban Area**
- **Major Settlements**
  - Boston Spa
  - Garforth
  - Guiseley/Yeadon
  - Kippax
  - Morley
  - Otley
  - Rothwell
  - Wetherby
- **Smaller Settlements**
  - Allerton Bywater
  - Bardsey
  - Barwick-in-Elmet
  - Bramham
  - Bramhope
  - Calverley
  - Collingham
  - Drighlington
  - East Ardsley
  - Gildersome
  - Lofthouse/Robin Hood
  - Micklefield
  - Mickletown methley
  - Pool-inWharfedale
  - Scholes
  - Swillington
  - Tingley/West Ardsley
- **Villages/Rural**

Future Growth Options



* Leeds Main Urban Area is taken to represent the RSS designation of Leeds the Regional City

** New Settlement to be considered only after that point when further growth within the existing settlement hierarchy will jeoprodize the unique settlement character of Leeds

APPENDIX 1 CORE STRATEGY PREFERRED APPROACH

Leeds Centre Hierarchy

Leeds Main Urban Area

- **Leeds City Centre**
  - **Edge of City Centre**
- **Town Centres of:**
  - Armley, Bramley, Chapel Allerton, Cross Gates, Dewsbury Road, Farsley, Halton, Harehills Corner, *Harehills Lane*, Headingley, Holt Park, Horsforth Town Street, Hunslet, Kirkstall, Meanwood, Middleton Ring Road, Moor Allerton, Moortown Corner, Oakwood, Pudsey, *Richmond Hill (All Saints)*, Seacroft
  - **Edge of Town Centre**
- **Local Centres**
  - Adel, Beeston, Beeston Hill, Burley Lodge (Woodsley Road), Burley Village, Butcher Hill, Broadgate Lane (Horsforth), Cardigan Road, Chapeltown (Pudsey), Chapeltown Road, *Coldcotes Circus, Gipton*, Cottingley, Galloway Lane (Pudsey), *Gipton (Amberton/Fearnville)*, Harehills Road, Harehills Lane/Shaftsbury, Hawksworth Estate Centre, Holbeck, Hollin Park (Easterly Road), Horsforth New Road Side, Horsforth Station Road, Hyde Park Corner, Ireland Wood, Kirkstall Road, Lincoln Green, Little London, Lower Wortley (Granny Lane), Lowtown (Pudsey), Middleton Park Circus, Middleton Town Street, Montreal (Harrogate Road), New Wortley (Tong Rd/Green Lane), Oldfield Lane (Wortley), Richmond Hill, Rodley, Royal Parks, Slaid Hill, Stanningley Bottom, Street Lane, Swinnow, Tommy Wass' (Dewsbury Road), Upper Town Street, Weetwood (Far Headingley), Whingate Junction, Whinmoor, Woodhouse Street
  - **Edge of Local Centre**
- Neighbourhood Shopping Parade

Major Settlements

- **Town Centres of:**
  - Boston Spa, Garforth, Guiseley, Kippax, Morley, Otley, Rothwell, Wetherby, Yeadon
  - **Edge of Town Centre**
- **Local Centres**
  - Guiseley (Oxford Road), Oulton, Rawdon (Leeds Road), Rawdon village, Woodlesford, Churwell
  - **Edge of local centre**
- Neighbourhood Shopping Parade

Smaller Settlements

- **Local Centres**
  - Calverley, Collingham, Drighlington, East Ardsley, Gildersome
  - **Edge of local centre**
- **Local Centre or Neighbourhood Shopping Parade Aspiration**
  - Allerton Bywater, Bardsey, Barwick-in-Elmet, Bramham, Bramhope, Lofthouse/Robin Hood, Micklefield, Mickletown Methley, Pool-inWharfedale, Scholes, Swillington, Tingley/West Ardsley

Reflects planning policy aspiration to be a town or local centre, as identified in the emerging EASEL AAP

Only where linked to the growth and settlement strategy, there is a potential for centres to advance up the hierarchy, including for new settlements.

APPENDIX 2

List of proposed Town and Local Centres

Proposed Town Centres	Proposed Higher Order Local Centres	Proposed Lower Order Local Centres
Armley	Beeston	Adel
Bramley	Boston Spa	Alwoodley, King Lane
Boston Spa	Harehills Corner	Beeston Hill
Chapel Allerton	Kippax	Burley Lodge
Cross Gates	Moortown Corner	Chapeltown Road
Dewsbury Road	Montreal, Harrogate Road	Coldcotes Circus
Farsley	Chapeltown, Pudsey	Collingham Village Centre
Garforth	East Ardsley	Drighlington
Guiseley	Hollins Park	Galloway Lane, Pudsey
Halton	Horsforth, New Road Side	Guiseley, Oxford Road
Harehills Lane	Kirkstall Road	Hawksworth Estates Centre
Headingley	Middleton Park Circus	Holbeck
Holt Park	Butcher Hill	Horsforth, Station Road
Horsforth Town Street		Hyde Park Corner
Hunslet		Ireland Wood
Kippax		Lincoln Green
Kirkstall		Lower Wortley
Meanwood		Rawdon, Leeds Road
Middleton		Royal Parks
Moor Allerton		Slaid Hill
Morley		Stanningley Bottom
Oakwood		Street Lane
Otley		Tommy Wass
Pudsey		Weetwood, Far Headingley
Richmond Hill All Saints		Woodlesford
Rothwell		
Seacroft		
Wetherby		
Yeadon		

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APPENDIX 3

SUMMARY OF TOWN CENTRE HEALTHCHECKS UNDERTAKEN BY COLLIERS INTERNATIONAL

Armley is a centre which appears to operate well locally providing a good focus for local residents. The centre has a range of facilities, with a new sport and leisure centre being recently completed. While it does not, at present, contain a large foodstore, there is a planning permission for such a store on a site at Carr Crofts. The development of this site would represent a significant improvement to the retail offer available and bring it to a level comparable with most other town centres.

The policy aspiration of accommodating a modern scale foodstore is longstanding and it is not considered that this should change. It is considered that the Council will need to consider options for attracting a comparable but alternative scheme if the permitted scheme is not delivered within a reasonable timescale.

Boston Spa is defined as a town centre in the UDP and in the CSPA. While Boston Spa is a sizable settlement, and there is a range and mix of retail units and other services in the centre, it is concluded that it does not meet the definition of a town centre. The household survey supports this view with no store in the centre attracting a significant share of total spend on convenience goods. It also reflects the commercial assessment of the centre. This report subsequently suggests a two-tier approach to local centres and it is suggested that Boston Spa should be re-categorised.

Bramley town centre is based on a purpose built scheme which incorporates a range of retail outlets, supplemented by more recent development to its north east. The Centre as defined suffers from changes in levels and the orientation of the purpose built scheme which backs onto areas at a lower level and consequently integration of the different areas is difficult. Further development within the existing boundaries at the lower level to the north east should not be ruled out but it will be difficult to integrate the different areas and uses. The boundary might be extended to reflect existing uses south west of Town Street and north east of Waterloo Lane. The main scheme owners have investigated various ways of improving both the environment and overall offer and it is considered that such suggestions should be encouraged and supported as far as possible

There is land within the existing centre boundary which could accommodate further new development. Some might be small scale development integrated with the existing centre, but the larger opportunities lie to the north east of the main development. Further growth should be supported.

Chapel Allerton is another historic suburban centre which is limited in terms of its physical capability to meet major foodstore or other larger footprint shopping requirements. The centre has a relatively small foodstore (Somerfield on Stainbeck Lane/School Lane), with a limited number of other convenience units. However, the centre has a wide range of other facilities and provides a good facility for its community.

The commercial view is that the centre could support additional development and the estimates of need would support this. However, physical constraints have precluded expansion over many years and unless early investigations of any potential sites throw up development opportunities it is considered more likely that the centre will maintain its current level.

The nearby Montreal Avenue local centre has had some recent development, including a Lidl supermarket and it is likely that the town and local centre complement one another to some extent for the local community.

Cross Gates centre has been and remains based on the Arndale Centre. While there are a number of small foodstores in the centre, it lacks a major supermarket or superstore, but has strong comparison goods offer as demonstrated by the household survey results. Outside the Arndale Centre there are a number of smaller parades although the roads running through the centre are busy and so limit integration. Nonetheless it attracts a significant number of visitors and is an important focus for its community.

Dewsbury Road is a centre located within an area of Leeds within which easy access to major foodstores would normally be considered particularly important. The centre in many regards falls short of the offer that would be expected from a town centre, although it has a range of retail and service units, together offering a variety of employment opportunities. In commercial terms, it is perceived as declining. However, its future as a town centre serving both its immediate residential area and an appropriate wider catchment is a key issue going forward because of the relatively low level of provision and limited current opportunities for addressing this issue.

Farsley is a traditional centre within an area which has been absorbed by the growth of the main urban area. Its topography, the pattern of development with residential and mill space closely mixed in has traditionally constrained the scope for any large footplate retail development . Moreover, it is a centre which is away from major routes. Consequently, while it provides a focus service for the immediate local community, it is not a main centre for major weekly shopping requirements.

In both commercial terms and in relation to expenditure, it is a centre which could be expanded. There are no apparent in-centre opportunities of any significance, but opportunities to expand the boundary to incorporate areas with development potential should be investigated.

Garforth town centre has always been constrained physically by development close to the back of Main Street. Residential development is the main constraint, rising up to the rear of retail and service properties and has never provided opportunities for any significant redevelopment. It is for this reason that planning permission was granted for the out of centre store, now Tesco, which is not related to the centre.

The town centre has a range of facilities which enable it to function as a service centre for Garforth, but it is not the main shopping destination and its future place in the hierarchy and the role it will be able to play, particularly taking into account potential growth in this area, may need significant reassessment and opportunities to expand the centre assessed.

Guiseley centre, running along Otley Road, has been significantly extended by the Morrisons superstore and Guiseley retail park. Indeed, it was these developments that raised Guiseley to town centre status. The general area has a strong retail offer which is supplemented by a range of other services and facilities. There is expenditure capacity and this is a sustainable location, with rail as well as bus access. The scope to extend the boundaries should be investigated.

Halton has expanded and its role has been emphasised by development of a significant comparison goods outlet, together with a small supermarket. It has a range of other small units providing comparison and service uses as well as a variety of service and employment opportunities. While its catchment area is relatively restrictive, it performs a town centre role for its immediate community.

The commercial view is that expansion could be supported. No further opportunities are apparent within the centre while residential development seems to constrain the boundaries. However, there is merit in investigating whether there is any further scope for extending the boundaries.

Harehills Lane is a centre identified in the Core Strategy Preferred Options as a potential new town centre. While it has many of the characteristics of Harehills Corner in terms of constraints posed by residential development, it is far less divided by traffic. Moreover, while it is an extensive linear centre, there seems to reasonable levels of pedestrian movement through it and associated with various sporting facilities. Perhaps most significantly, the centre has had new supermarket developments at both its north and south edges.. This not only consolidates the centre itself, but as discussed later, goes a significant way to replacing the role originally envisaged for Harehills Corner in terms of meeting convenience shopping needs.

While the commercial view has been that the centre will not grow, the Morrisons and Netto developments have run counter to this, demonstrating convenience operator view of the local demand. The quantitative analysis supports this and, particularly given views on Harehills Corner centre, it is considered this status is merited. The relative newness of the supermarkets suggests that there is a time for the centre to consolidate and adjust to what will be a new role within the hierarchy. Consideration should be given to redrawing the centre boundaries to reflect these new developments.

Harehills Corner has been identified as a town centre to serve the inner north east/east suburbs of Leeds since the original development plan. It had been envisaged that the centre, along with other similar centres in other parts of Leeds would be the subject of comprehensive redevelopment during the 1960’s to provide “modern” shopping centres. However, this never proceeded but the centre retained its status into the UDP.

While there had been aspirations that it might be expanded to accommodate a relatively large convenience goods store, no such proposals emerged. This is not surprising given that it is another centre which is heavily constrained by close knit residential development around it. It is also constrained by the fact that the main Roundhay Road runs directly through it with a number of junctions for cross town traffic which serve to increase vehicular congestion and inevitably detract from environmental quality. Recognising this, the city council have granted a series of planning permissions for stores designed to meet the needs of this part of the city: the Tesco within an expanded Oakwood, ASDA at Killingbeck as part of a mixed use development and more recently Morrisons and Netto at Harehills Lane. At the same time, retail and other facilities at Harehills Corner have been less and less able to meet more than day to day needs of the local community. It has nonetheless retained its nominal status within the hierarchy.

It is suggested that it is now appropriate to redefine Harehills Corner as a large local centre, still encouraging and providing policy protection for the independent outlets and specialist offer which dominate the centre to continue and hopefully thrive. The support to alternative and independent retailers in this location is particularly appropriate as both Oakwood and, increasingly, Harehills Lane provide the range of retail and other facilities which meet town centre status, serving needs in this part of Leeds.

Headingley is a centre which appears to have adjusted to a particular role with a strong local community base, as well as significant presence of students in the area whose shopping habits will be rather different to main family groupings. It is a centre with a good range of employment uses and a variety of service and leisure facilities. There does not appear to be room for expansion, but it appears to have consolidated its position in this part of the City.

The commercial view is that additional development could be supported, although the requirements are leisure orientated. It is not considered that there are further opportunities for physical extension. The Waitrose development at Meanwood and Morrisons at Kirkstall Lane, to some extent, addressed the large convenience store issue with the Sainsburys in Headingley Arndale, providing a good quality local facility.

Holt Park centre was developed to meet particular needs and new development in that sector of north west Leeds. However, over the years the nature of the centre has changed with the ASDA store occupying a number of the smaller units, the remaining small units becoming marginal and employment uses declining. The leisure centre and school combine with the store to make it a strong community focus, but it is somewhat tired and unwelcoming and does not have the range and number of units of many of the historic suburban centres. While it is considered to play an important town centre role, its limitations are clear, and its town centre shopping role is limited. The ASDA site however clearly serves an important function.

There would appear scope to extend and/or reconfigure the centre and it is considered that this should be investigated further given capacity in this area. LCC will wish to consider its position as land owner.

Horsforth was once a freestanding town centre with a wide range of shops and service uses. It contains a Morrisons superstore, albeit in a relatively out dated and limited store fabric, but clearly from the household survey plays an important function in the community. It plays an important role within the hierarchy, it is seen as positive in commercial terms and is within a sector with convenience capacity. However, the centre appears wholly constrained by established residential areas and so expansion does not seem practical. There may be scope for redevelopment within the centre, but this would be brought forward by a commercial developer. It is suggested that Church Road could form the north western boundary of the centre.

Hunslet centre is the major centre in south Leeds and this is reflected by the level of use. The purpose built centre anchored on a superstore has been added to by a number of fringe developments. The retail offer plus a number of community elements make this an important centre in south Leeds.

A major ASDA superstore at Middleton has planning permission and this will inevitably result in changing shopping patterns in south Leeds, although the town centre role and function of Hunslet should remain unchanged.

Kippax town centre is limited essentially in terms of its retail offer. The household survey shows that it performs a relatively limited function. However, its historic character and the range of services and facilities therein suggest that it maintains a role of something of a focus for the local community, albeit it is not seen significantly as a significant shopping centre.

It is not considered that it meets the PPS4 criteria for a town centre in its current form, notwithstanding its historic importance as a village" centre and it is consequently recommended that it should be re-categorised.

Kirkstall had historically been a centre of a traditional character and relatively small units based around the Commercial Road/Kirkstall Lane/Bridge Road. It became a more significant centre with the development of a supermarket with a post office and other small units through the development east of Commercial Road and south of Kirkstall Lane. However, the size of the main store was not able to compete with larger stores being developed and the development began to decline. This was subsequently accelerated by the development of Morrisons and associated development at Savins Mill Way.

In recent years the redevelopment of the original centre and adjoining land has been explored and planning applications submitted in 2005. No scheme has yet been progressed by the developer. The defined centre is extensive, including units in the 'island' site between Bridge Road and Savins Mill Way, the leisure centre in the north east sector of the main junction and smaller units further east. Most significantly within the town centre is the former Clover and then Allders Department store, currently BHS, to the north of Bridge Road. This property has the benefit of a planning permission to increase the floorspace to increase retail and food and drink provision and also to aim to integrate better with the other parts of the defined centre.

It is a very dispersed centre with no strong focus. Pedestrian flows around it appear limited and it appears to be a centre which, if it does function as such, does so through reliance on private vehicle movements. In considering applications for parts of the defined Town Centre it does appear that the City Council has recognised the need to attempt to address these issues and increase integration. The scope for any new development or redevelopment to assist in improving pedestrian linkages around the centre should be explored. We would also advise that any redevelopment proposals of land or premises should be assessed very carefully in relation to implications for the place of Kirkstall within the hierarchy. We would advise that any applications should be required to address this specifically and to consider possible individual and cumulative impacts.

Meanwood town centre has very recently been changed significantly by the introduction of the Waitrose supermarket replacing a smaller Co-Op store with a number of small units. The centre has on outdated 1960's precinct which adds to the range of services and facilities and also includes a retail park with a range of retail units. If anything, the role of Meanwood serving north west Leeds has increased over the years and the effect on its role of the Waitrose development will need to be assessed. The centre is generally constrained by residential development which seems likely to limit the scope for further growth.

Middleton centre has been the subject of two recent planning applications for superstores. The City Council has resolved to grant permission to one of these to meet identified needs and deficiencies which were set out in the UDP. It is understood that the development is considered highly likely to proceed and this will have a significant effect on the district centre and the role it is able to play.

Moor Allerton town centre has a relatively short history but has nonetheless changed significantly. The original relatively modest supermarket has now been replaced by a major Sainsburys store with limited other retailing but including large comparison units, Homebase and Comet. To the south of the ring road is a major leisure facility which is not within the boundary. Moor Allerton is relatively limited in the range of facility normally required to justify town centre designation though it does include a library and dental facilities. However, it functions as a major retail destination, but the smaller units and other services are limited and the location is not perceived as attractive to independent retailers.

Moortown Corner was an identified district centre to be the focus for significant expansion during the 1960's, but this was not delivered and the Moor Allerton centre emerged as a consequence to meet needs in this part of the City. However, it has consolidated much of its function in terms of services and supporting retail while the development and extension of the Marks and Spencer Simply Food provides a foodstore. It does not meet weekly shopping needs with this function having been taken by Moor Allerton notably, but its range of facilities, noting shoppers perception of the importance of its financial services, may justify it taking on a town centre definition. However, it is considered here, and noting our views on the scope for sub-division of local centre status, that town centre definition is not appropriate.

Morley town centre was traditionally one of the largest freestanding town centres in Leeds. It has a traditional core with a thriving privately owned market with a good superstore acting as anchor. It has continued to function and survive, within an area of significant apparent local loyalty, despite an out of centre Asda of long standing and more recently the White Rose development. However, it seems clear that these developments, and particularly the latter, have constrained growth which might otherwise have taken place in Morley town centre. However, it is a strong town centre performing an important function to a very distinctive community.

Oakwood centre is one whose role has been changed significantly as a consequence of edge of centre development, in this case both convenience and comparison goods development initially on the site immediately to the south of this historic centre. The traditional centre contained a range of retail and service uses, while the major superstore, albeit not maximising the physical linkages for encouraging linked trips, thus enables the centre to play a significant role. This centre over recent years, together with the new development at Harehills Lane, has in effect served to meet requirements which had been expected originally to be met at Harehills Corner.

Otley town centre is one of the historic freestanding towns with a very distinctive character. It has a recent medium sized Sainsbury supermarket within the defined town centre, an edge of centre Waitrose and out of centre Netto. The centre itself is constrained by its historic character and the consequent relatively small unit sizes which have restricted the interest in the centre of national multiples.
Otley has a good street market and a range of supporting community facilities, including a new library.

The historic form and character of the town centre constrains redevelopment, but there are opportunities behind the Kirkgate and Westgate frontages and to the north of Westgate which might accommodate retail development more suited to modern requirements and it is considered that the principle of these should continue to be supported. The town centre boundary should be re-assessed to reflect the current extent of retail and other town centre uses.

Pudsey shares a history of development with other outlying towns, it is more constrained by its setting and has never had the extent of retail offer of most of those towns. There does not appear to be significant opportunity for this position to change, but its historic range of functions means that it will continue to play this role. It is not a major location for convenience shopping, but has continued to consolidate its current role, despite a number of freestanding developments in the sector of the City. Consequently, there is considered to be scope for further development, but no physical scope for significant development is apparent.

Rothwell is a freestanding town and is one which has been anchored for many years by a Morrisons superstore. A replacement store has recently been developed and this development has improved the centre. This investment appears to have increased shopper and commercial confidence. It is suggested that the effect of this on commercial perceptions over the short term should be assessed and this may, as the economy generally improves, provide a catalyst for the investigation of further redevelopment opportunities.

Seacroft town centre has been the subject of whole scale redevelopment. In retail terms, the centre has the appearance of a retail park with a large Tesco store with a number of supporting retail units. The configuration of the redevelopment has resulted in the community facilities being located behind and so not ideally integrated with the retail units.

Wetherby town centre identified in the UDP as one where opportunities for new retail development, and particularly a new foodstore, were to be sought. In-centre opportunities were limited by the historic character of the town while the scope to extend was limited by the River Wharfe and existing development and uses. Consequently the UDP suggested the then apparently nearest opportunity on a redundant site immediately south of the town centre beyond the river. This site was not brought forward for development and indeed was redeveloped for housing, the retail need having been met by the redevelopment and extension of the former Co-op store to provide premises for Morrisons. This store now provides a strong anchor to the town centre.

The commercial view is of a strong centre, but where the historic character limits in-centre redevelopment and the constraints of surrounding development limit expansion opportunities.

Yeadon town centre is one of the outlying centres which grew to meet its own community needs. Its retail offer has modernised, together with a good range of services, it continues to perform this role. The current town centre definition includes edge of centre elements along Town Street that would provide an appropriate opportunity for redevelopment. The local topography provides challenges in terms of integration for easy pedestrian links with the High Street which would need to be considered in the context of the scale and function of the centre.

APPENDIX 4

Convenience and Comparison Goods Retail Summary

The tables below reflect the need for additional convenience and comparison goods floorspace generated within each of the districts zones. The figure is derived using the market shares approach set out in paragraphs 3.26 to 3.27 and takes account of forecasts for changes in consumer expenditure and population growth. A positive figure reflects a need for new floorspace over and above existing commitments (planning permissions yet to be implemented. A negative figure suggests there is an existing overcapacity of floorspace in the zone, i.e. that floorspace is performing less well than could be expected. However, as stated in paragraphs xx to xx, this does not mean that the additional need has to be met by providing new floorspace in that specific zone if that approach would be considered unsustainable or damaging to city and town centre retail schemes within Leeds or neighbouring authorities. Likewise a negative figure does not mean that no new floorspace should be provided, particularly if there are major housing growth proposals in the area.

Table 1 Estimated Convenience Goods Retail Need (sq.m net)			
Zone	**2016**	**2021**	**2026**
Zone 1 - Inner East	8,050	9,935	11,868
Zone 2 - Inner North East	-1,800	-1,383	-999
Zone 3 - Inner North West	1,248	1,653	1,911
Zone 4 - Inner South (City Centre)	-12,091	-10,699	-9,571
Zone 5 - Inner West	-3,182	-2,939	-2,734
Zone 6 - Outer East	-1,739	-296	1,556
Zone 7 - Outer North East	8,401	9,112	9,780
Zone 8 - Outer North West	19,345	21,842	24,051
Zone 9 - Outer South	746	2,394	4,074
Zone 10 Outer West	649	1,128	1,579
TOTAL: LEEDS DISTRICT	**19,626**	**30,747**	**41,515**

Table 2 Estimated Comparison Goods Retail Need (sq.m net)			
Zone	**2016**	**2021**	**2026**
Zone 1 - Inner East	6,800	8,551	10,587
Zone 2 - Inner North East	50	265	443
Zone 3 - Inner North West	-8,260	-8,065	-8,183
Zone 4 - Inner South (City Centre)	24,404	39,238	40,177
Zone 5 - Inner West	-3,663	-3,588	-3,801
Zone 6 - Outer East	-6,540	-5,697	-4,844
Zone 7 - Outer North East	4,347	4,794	5,190
Zone 8 - Outer North West	5,006	6,297	7,362
Zone 9 - Outer South	100,012	108,434	116,892
Zone 10 Outer West	13,419	13,927	14,378
TOTAL: LEEDS DISTRICT	**135,576**	**164,157**	**178,201**

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