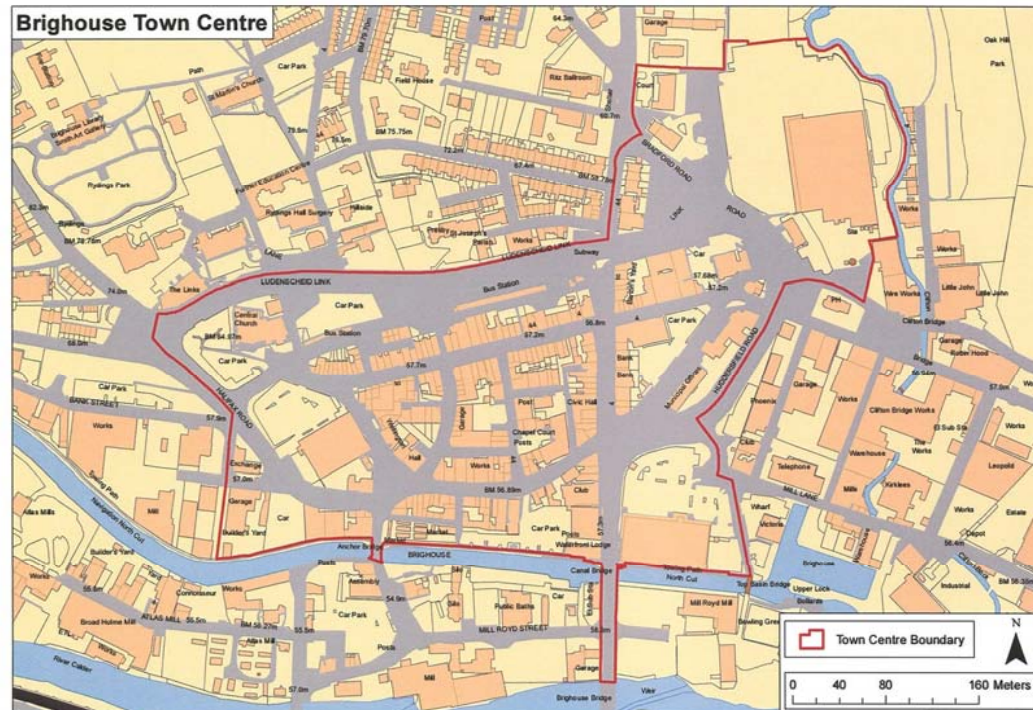


BRIGHOUSE HEALTH CHECK ASSESSMENT

Date of Site Visit: 6 August 2009

Status: Town Centre (Replacement Calderdale UDP 2006)

Figure 1: Town Centre boundary of Brighouse Town Centre



Source: Calderdale UDP (2006)

Photographs of Brighouse Town Centre



Figure 2 (top left): Bus station, Ganny Road

Figure 3 (top centre): Vacant retail units, Park Street

Figure 4 (top right): Tesco store, Huddersfield Road

Figure 5 (bottom left): Flower beds, Thornton Square

Figure 6 (bottom right): Retail frontages, Bradford Road



Centre Overview

Brighouse is defined as a town centre by the Replacement Calderdale Unitary Development Plan (August 2006). It is located on the A641, just off the M62, 8 km to the south east of Halifax and 8 km to the north of Huddersfield. According to the 2001 census, Brighouse had a population of 10,859.

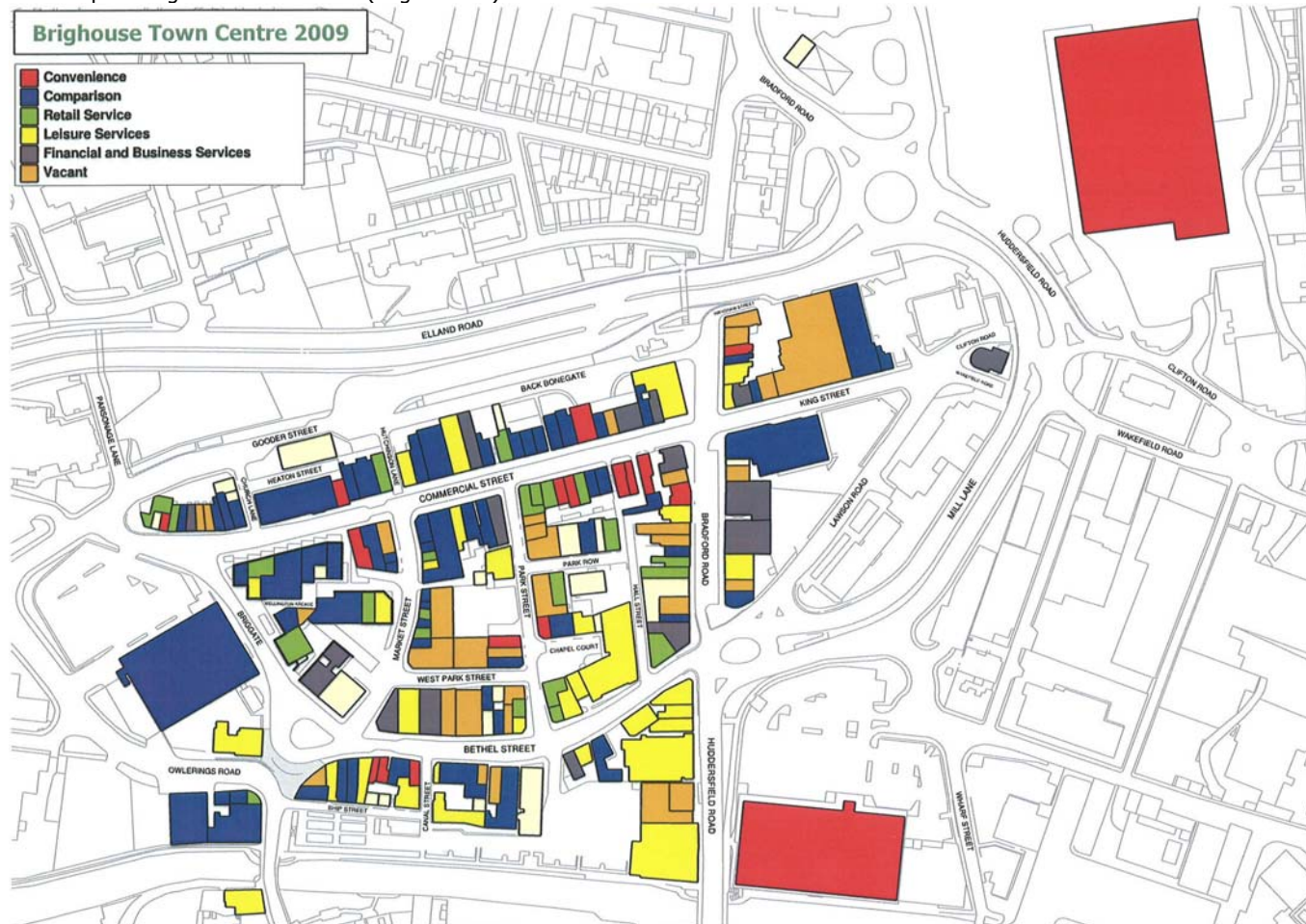
The main focus of retailing within Brighouse is Commercial Street to the north and Bradford Road and Huddersfield Road to the east. There are also secondary retail frontages along Bethel Street, Briggate, Hall Street, Market Street and Park Street. A land use plan of Brighouse Town Centre as defined by GOAD is set out overleaf.

Figure 7: Land Use map for Brighouse Town Centre (2001)



Source: GOAD (March 2001)

Figure 8: Land Use map for Brighouse Town Centre (August 2009)



Source: GOAD base validated by WYG August 2009 site visit

Table 2: Diversity of Uses in Brighouse Town Centre (2001)

Number of Outlets			
	Number	Brighouse (%)	UK (%)
Convenience	23	11.9	9.5
Comparison	70	36.3	38.0
Retail Service	28	14.5	12.1
Leisure Services	30	15.5	18.5
Financial and Business Services	21	10.9	12.1
Vacant	21	10.9	9.8
Total	193	100	100

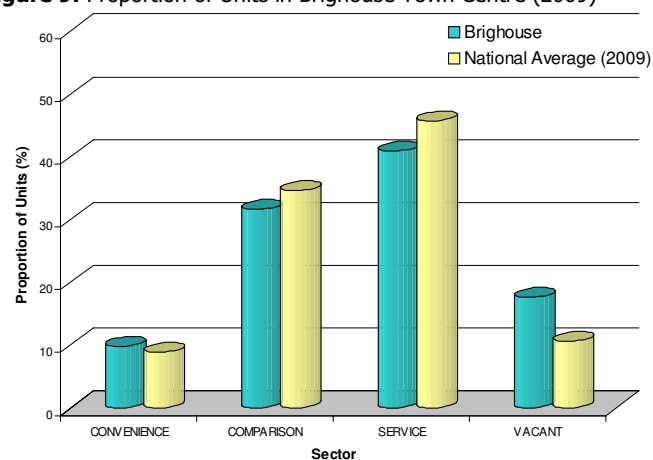
Source: GOAD Report March 2001

Table 3: Diversity of Uses in Brighouse Town Centre (2009)

Number of Outlets			
	Number	Brighouse (%)	UK (%)
Convenience	19	9.8	8.8
Comparison	61	31.6	34.6
Retail Service	26	13.5	13.0
Leisure Services	34	17.6	21.5
Financial and Business Services	19	9.8	11.2
Vacant	34	17.6	10.6
Total	193	100	100

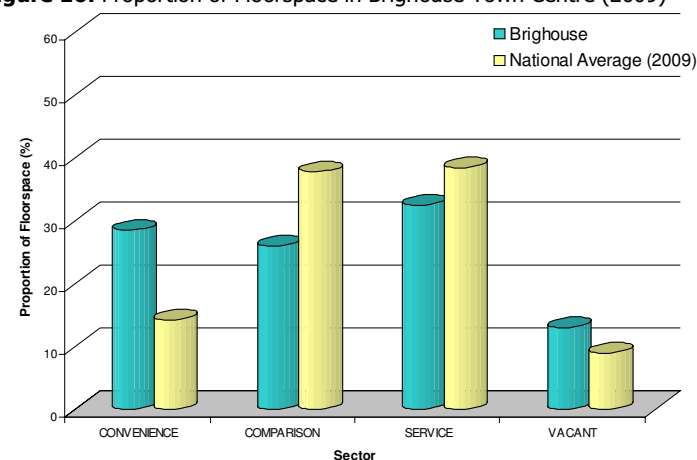
Source: GOAD Report August 2009

Figure 9: Proportion of Units in Brighouse Town Centre (2009)



Source: Experian GOAD (2009)

Figure 10: Proportion of Floorspace in Brighouse Town Centre (2009)



Source: Experian GOAD (2009)

Table 4: Existing Floorspace in Brighouse Town Centre (2001)

Existing Floorspace			
	Sq m	Brighouse (%)	UK (%)
Convenience	6,340	22.5	14.5
Comparison	9,810	34.9	40.4
Retail Service	2,730	9.7	7.2
Leisure Services	4,830	17.2	20.2
Financial and Business Services	2,760	9.8	10.2
Vacant	1,650	5.9	7.4
Total	28,120	100	100

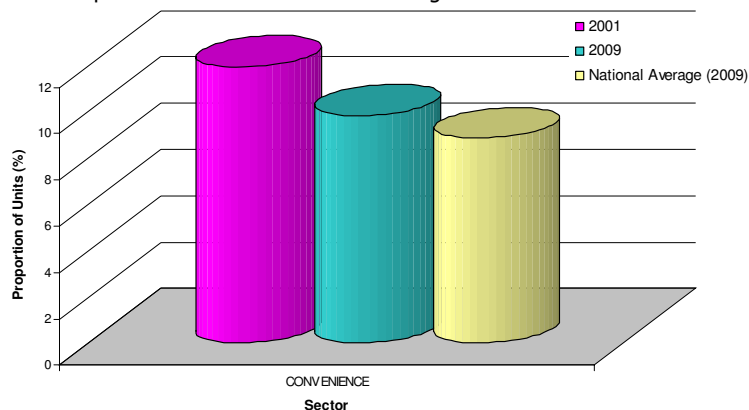
Source: GOAD Report March 2001

Table 5: Existing Floorspace in Brighouse Town Centre (2009)

Existing Floorspace			
	Sq m	Brighouse (%)	UK (%)
Convenience	10,110	28.5	14.2
Comparison	9,230	26.0	37.8
Retail Service	2,330	6.6	7.0
Leisure Services	6,490	18.3	22.7
Financial and Business Services	2,660	7.5	8.7
Vacant	4,620	13.0	8.9
Total	35,440	100	100

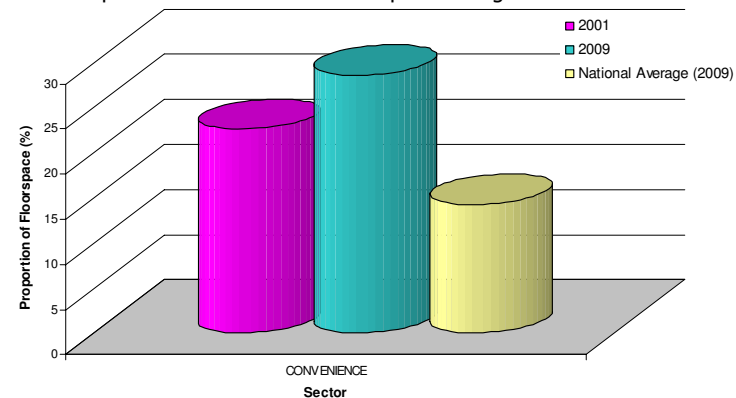
Source: GOAD Report August 2009

Figure 11: Proportion of Convenience Units in Brighouse Town Centre



Source: Experian GOAD (2009)

Figure 12: Proportion of Convenience Floorspace in Brighouse Town Centre



Source: Experian GOAD (2009)

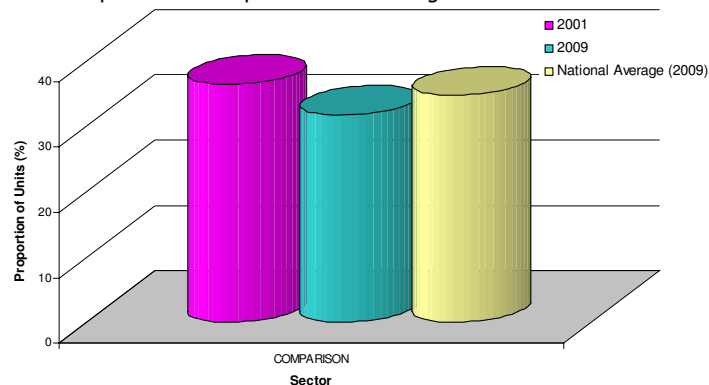
Convenience

In August 2009, 9.8% of all the units in Brighouse were in use for the sale of convenience goods. This compares to a national average of 8.8%. The proportion of convenience floorspace is well above the national average (28.5% compared to 14.2% nationally). Therefore, there are an above average number of convenience outlets and it would appear that these tend to be large in size and provide a wide range of goods. At present, this sector is dominated by Tesco on Huddersfield Road and Sainsbury's on Mill Lane. In 2001, the Tesco store was located on Briggate (where Wilkinson is currently); however it recently moved to its new premises in 2008.

Other convenience traders in the centre are: Fultons on Commercial Street; and a number of independents including five 'bakers', four 'CTN' stores and two 'butchers'.

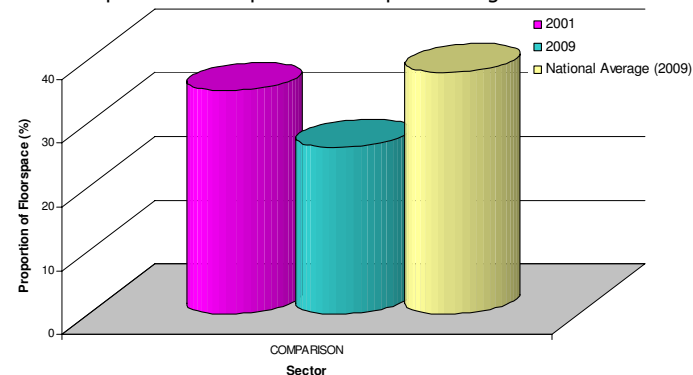
Table 2 indicates that at 2001 there were 23 convenience retailers in the town centre accounting for 6,340 sq m of retail floorspace. In the eight year period since then, the number of convenience operators in Brighouse has declined by four units, whereas the amount of convenience floorspace has increased by 3,770 sq m. This increase in floorspace is largely due to Tesco moving to its new premises which has a floorspace of 6,060 sq m.

Figure 13: Proportion of Comparison Units in Brighouse Town Centre



Source: Experian GOAD (2009)

Figure 14: Proportion of Comparison Floorspace in Brighouse Town Centre



Source: Experian GOAD (2009)

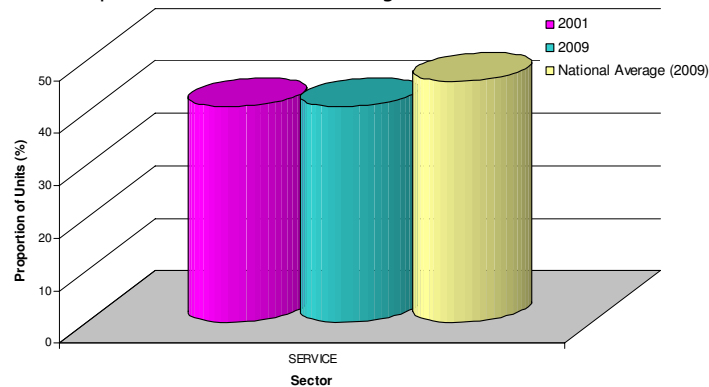
Comparison

Comparison traders in Brighouse occupy 31.6% of outlets against a national average of 34.6%. However, when it comes to comparison goods floorspace, Brighouse is below the national average with a figure of 26% compared to a national average of 37.8%. Since 2001, the number of comparison units has decreased by nine, with the level of floorspace decreasing by 580 sq m.

Overall Service

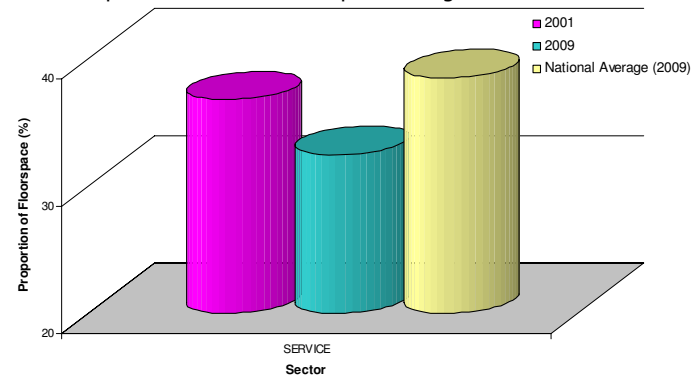
In August 2009, the service sector comprised 79 units and occupied 11,480 sq m of floorspace. The proportion of service outlets (40.9%) are below the national average (45.7%) as are the proportion of service floorspace (32.4% compared to 38.4%).

Figure 15: Proportion of Service Units in Brighouse Town Centre



Source: Experian GOAD (2009)

Figure 16: Proportion of Service Floorspace in Brighouse Town Centre



Source: Experian GOAD (2009)



Retail Service

Retail services, which comprise such uses as hairdressers, dry cleaners and petrol filling stations, account for 13.5% of outlets and 6.6% of floorspace in Brighouse, which compares to a national average of 13% and 7% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for eleven (or 42.3%) of all retail service outlets. The town contains a Post Office at the Wellington Arcade, Briggate.

Leisure Services

Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Brighouse is under provided for in this sector with both the proportion of outlets (17.6%) and the proportion of floorspace occupied (18.3%) being below the national average (21.5% and 22.7% respectively). Fast-food and takeaway units are the most prolific in this sector, occupying nine units. Other well represented traders include restaurants, public houses and cafes which each occupy six units each.

Financial Services

In terms of the proportion of units occupied by financial and business services the figures in Brighouse are below the national average, occupying 9.8% of all outlets compared to a figure of 11.2% nationally. A number of 'high street' banks are present in the town centre, including: Abbey; Barclays Bank; Bradford and Bingley; Halifax; HSBC; Lloyds TSB; Nat West; Yorkshire Bank and Yorkshire Building Society.

Non Retail

In addition to the retail services on offer, there is a health centre, public library and art gallery in the centre. Furthermore, Brighouse town centre is surrounded by residential areas.

Top 20 Retailers

Of the list of 'Top Twenty Retailers' as identified by GOAD, Brighouse accommodates three of these businesses within the Town Centre, namely Boots, Wilkinson and Superdrug. The former Woolworths store has been turned into the Yorkshire Trading Company retail unit.

Table 6: Top 20 Retailers

Rank	Retailer
1	Boots
2	Marks & Spencer
3	Argos
4	Woolworths
5	Debenhams
6	John Lewis
7	W.H. Smith
8	BHS
9	Next
10	Dixons
11	Superdrug
12	Lloyds Pharmacy
13	Wilkinson
14	CO-OP Department Stores
15	Primark
16	New Look
17	HMV
18	Dorothy Perkins
19	Rosebys
20	Waterstones

Source: Focus Report (May 2008)

Unit Sizes

Table 7 below highlights the composition of Brighouse Town Centre in August 2009 in terms of the size of units. This is taken from an assessment of retailing facilities provided by Experian GOAD for 2009.

Table 7: Size of Units

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Brighouse	GB
Under 93 sq m (1,000 sq ft)	115	59.6	39.1
93-232 sq m (1,000-2,499 sq ft)	53	27.5	39.6
232-464 sq m (2,500-4,999 sq ft)	14	7.3	12.6
465-929 sq m (5,000-9,999 sq ft)	7	3.6	5.1
929-1,393 sq m (10,000-14,999 sq ft)	1	0.5	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	0	0	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	1	0.5	0.7
Above 2,787 sq m (30,000 sq ft)	2	1.0	0.8
Total	193	100	

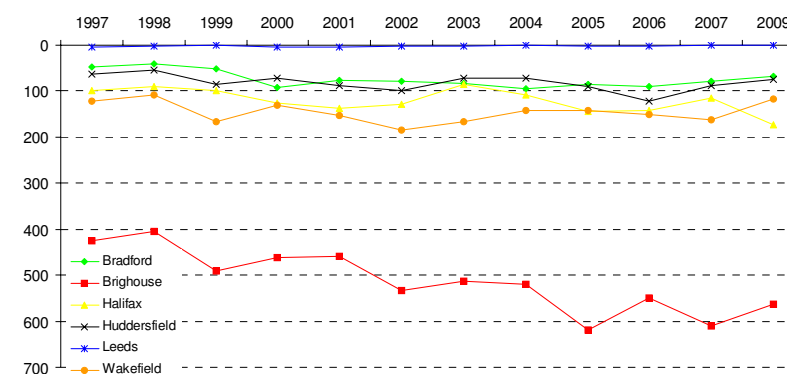
Source: Experian GOAD 2009

Brighouse has a large proportion of small units less than 93 sq m (59.6%) compared to the national average (39.1%). For the other categories, Brighouse appears to reflect national averages although there is an under-representation of units in the 1,393 to 1,858 sq m range which can be attractive to modern retailers. There are two units above 2,787 sq m.

Retail Demand

Brighouse's retail based on retailer demand has gradually fallen since 1997. This is generally reflected in nearby centres such as Bradford, Halifax, Huddersfield and Wakefield. Only Leeds has witnessed a fairly constant ranking recently.

Figure 17: Retail Ranking in Calderdale Catchment



Source: Focus Report (August 2009)

Retailer Requirements

Table 8: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	0	0	0
Comparison	3	720	1765
Service	2	442	1533
TOTAL	5	1,162	3,298

In August 2009 there were five retailers seeking representation within Brighouse, collectively requiring up to 3,298 sq m (gross) in retail floorspace. Comparison traders account for the highest number of requirements in outlet terms (3) and are seeking the highest amount of floorspace (1,765 sq m gross).

Table 9: Vacancies' in Brighouse (2001)

	Vacancy		
	Total	Brighouse (%)	UK (%)
No. of Outlets	21	10.9	9.8
Floorspace	1,650	5.9	7.4

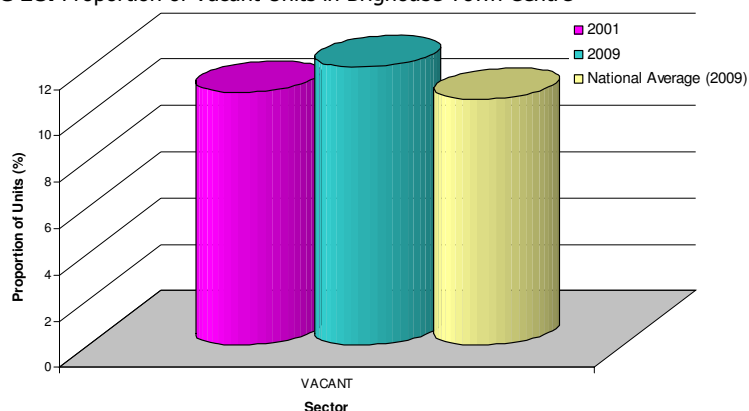
Source: GOAD Report March 2001

Table 10: Vacancies' in Brighouse (2009)

	Vacancy		
	Total	Brighouse (%)	UK (%)
No. of Outlets	34	17.6	10.6
Floorspace	4,620	13	8.9

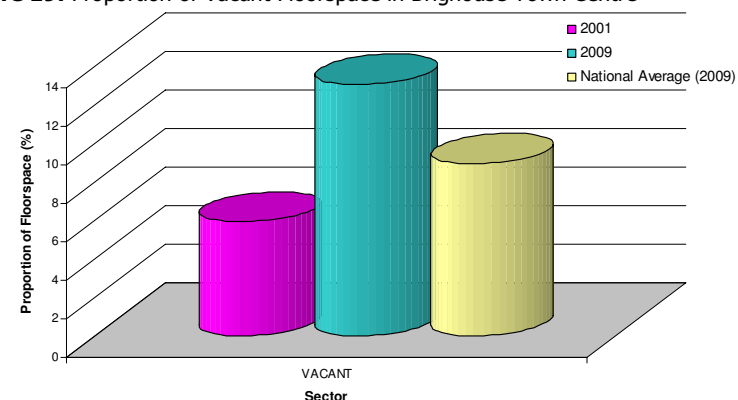
Source: GOAD Report August 2009

Figure 18: Proportion of Vacant Units in Brighouse Town Centre



Source: Experian GOAD

Figure 19: Proportion of Vacant Floorspace in Brighouse Town Centre



Source: Experian GOAD

Vacancies

The number of vacant units within a centre can provide a good indication of how a shopping centre is performing. However, care should be taken when interpreting figures. Vacancies can occur for positive as well as negative reasons for example the opening of a new retail centre elsewhere in a town may draw retailers from older properties or more peripheral areas of the city. Vacant units will be found in even the strongest town centre and are simply an indicator of the level of demand. For example some properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or simply not being actively marketed.

Conversely a low vacancy rate does not necessarily mean that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations. Despite these issues, it is still a useful indicator of town centre performance.

Table 10 illustrates that in August 2009 there were 34 vacant retail units in the town centre, which accounted for 4,620 sq m of floorspace. This represents 17.6% of all outlets and 13% of floorspace, compared to respective national averages of 10.6% and 8.9%.

Figure 20: Vacancies in Brighouse Town Centre (2001)



Source: GOAD (March 2001)

Figure 21: Vacancies in Brighouse Town Centre (August 2009)



Source: GOAD base validated by WYG August 2009 site visit



Since 2001, the number of vacant units has increased by 13 units, with the level of floorspace also increased, from 1,650 sq m in 2001 to 4,620 sq m in 2009, (an increase of 2,970 sq m). Two of these units have been vacant for at least the last 8 years, namely 104 Commercial Street (50 sq m) and a unit at Wellington Arcade (40 sq m). It is likely that these units have remained vacant due to their limited amount of floorspace. However, larger retail units are also vacant, including the 1,140 sq m King Street store and five units ranging from 220-290 sq m. Bradford Road (eight units), Bethel and Park Street (six units each) have the highest number of vacant units within the town centre.

In Street Survey Results

Accessibility

In respect of accessibility, the on-street visitors survey undertaken by NEMS identified the following:

- 61% of visitors to Brighouse had access to a car for personal use during the daytime. The same proportion of visitors had access to a car during the evening/ night-time;
- 55% of visitors arrived in the centre by car or van (either as a driver or passenger), with a further 21% of visitors arriving by bus, minibus or coach. 21% of visitors walked to the centre;
- Of those visitors who drove, the most popular place to leave their vehicle was on-street with 36% of drivers parking here. The most popular car park was Commercial Street (22%);
- 71% of drivers did not encounter any difficulty when obtaining a car parking space on the day of the survey;
- 51% of visitors travelled for 10 minutes or less to reach the centre. An additional 23% travelled for between 11 and 15 minutes, with 8% travelling for between 16 and 20 minutes and 14% for between 21 and 30 minutes. Only 1% of visitors travelled for over an hour to reach the centre;

- Accessibility by public transport was stated by 48% of visitors as being 'about the same' as in other centres, although 19% felt that this was 'better' or 'much better' in Brighouse than in other shopping centres.
- Visitors were asked to consider car parking provision in Brighouse. Of those that answered this question, 35% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 39% considered process to be 'about the same' as in other centres; and

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Brighouse. During the day-time, some 60% of visitors indicated that safety in Brighouse was 'about the same' as that in other centres, with 28% considering it to be 'better' or 'much better' than in other centres. However, with respect to safety during the evening/ night-time, the proportion of visitors who deemed safety to be 'about the same' as in other centres fell to 29%, with some 18% considering safety to be either 'worse' or 'much worse' than that in other centres. 7% of visitors felt that evening/ night-time safety in the centre was 'better' or 'much better' than other centres, with 46% indicating that they did not know either way.

Customer Views and Behaviour

The main findings of the on-street survey undertaken by NEMS Market Research were:

- 88% of visitors to the city had travelled directly from home;
- Most of those shoppers interviewed (51%) live in the centre, with 47% just visiting the centre and the remaining 10% working in the centre;
- The main reasons why visitors indicated that they were in the centre were: food and grocery shopping (23%), to visit the bank/ building society/ Post Office (12%), social/ leisure activities (10%) and clothes/ shoes shopping (8%);



- 35% of visitors planned to stay in the centre for up to half an hour, with a further 38% planning to stay in the centre for up to two hours and 14% planning to stay in the centre for up to half a day;
- The majority of visitors (74%) did not plan to undertake their main food shop on the day of the survey;
- When asked whether they were planning to buy anything other than food goods on the day of the survey, 20% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 43% of visitors stated that they visited Brighouse 'about as frequently' today as compared to five years ago. 38% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 72% of visitors indicated that they did not visit the centre during the evening.

Visitors to Brighouse were asked to consider a number of different aspects of the centre compared to other shopping centres which they used. The majority of aspects were considered to be 'about the same' in Brighouse by the largest proportion of Notwithstanding this, areas of weakness were seen to be leisure facilities, which 46% of visitors rated as being either 'worse' or 'much worse' than other centres, the choice of shops (39% stating that this was worse than elsewhere) and entertainment/ events/ performances (33%).

Visitors were asked about the types of shops and services they would like to see more of in the centre. Popular responses were clothing stores (33%) and department stores (26%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a swimming pool (60%), a cinema (8%) and a health and fitness centre (5%).

Business Survey Results

A questionnaire was distributed to all local businesses within Brighouse by WYG in conjunction with Calderdale Council in order to gain an understanding of the opinions and views of retailers. A total of 214 questionnaires were distributed, 60 being returned: a response rate of 28%. The main findings of the business survey results were as follows:

- 40% of respondents had been trading in the town centre in excess of twenty years, with some 27% having been in operation for over ten years and 5% trading for under three years;
- 73% of respondents were independent traders, with 27% being part of a national group or chain;
- 31% of respondents indicated that they were non-food retailers, with 22% being food retailers, 20% being professional services, 16% being retail services and 12% being leisure services;
- Most businesses (62%) employed between one and five members of staff;
- 58% of traders stated that since they had begun trading business had either 'grown significantly' or 'grown moderately', with 16% indicating that business had 'remained largely static'. 26% indicated that their business had declined to some degree since they began trading;
- 48% of respondents indicated that their business was currently performing either 'very well' or 'well', illustrating strong performance, with 38% stating that their business was currently trading 'moderately';
- The majority of respondents (67%) leased their premises;



- The survey indicated that 57% of traders relied on local residents primarily, although a further 22% relied primarily on residents in the wider Calderdale area for the majority of their business and 14% on office employees. 7% relied mainly on tourists;
- When asked about measures that would improve the town centre, 78% of respondents stated that an increased choice/ range of shops would have this positive affect. Other important measures included more independent/ specialist traders (62%), greater promotion/ marketing of the centre (60%) and more parking (58%);
- 54% of respondents felt that there was a good balance between shops and other non-retail uses, with 41% stating that there was too many non-retail uses in the town centre and 6% that there were not enough non-retail uses;
- Respondents identified the main barriers to trading performance as being a lack of day visitors/ tourists to the town centre (47%), inadequate customer car parking (43%) and high rents/ overheads (42%);
- A little over half of respondents (54%) indicated that they had no plans to alter their business in any way over the next five years, with a further 23% planning to refurbish their existing floorspace;
- 39% of respondents considered that shop front improvement grants would help their businesses;
- The majority of traders (55%) considered Huddersfield to be their biggest competitor.

The business survey asked respondents to rate a number of different aspects of Brighouse in terms of whether they were 'good', 'average' or 'poor'. The majority of aspects were rated as being 'average' by the largest proportion of respondents. However, a number of aspects were rated as being 'poor' by a majority of respondents. These aspects were: entertainment/ leisure (63%), special events (62%), public toilets (53%) and evening security (52%). Respondents were also able to add any additional comments they would like to make at the end of the survey. Through this process a number of retailers highlighted that the town centre would be improved with free car parking and that developments alongside the canal needed to be improved. On a positive note, certain retailers felt that the canal in Brighouse was an asset to the town and should be fully utilised.



Accessibility

Car: Brighouse is situated on the A641 just off the M62, which connects to Halifax to the north west and Huddersfield to the south. The M62 (junction 24) is nearby. To the south east of the centre is a busy roundabout; which provides access to the Sainsbury's store on Mill Lane. There is also a busy roundabout to the north east of the centre; which provides access to the Tesco store on Huddersfield Road.

Car parks: Parking is plentiful in Brighouse, with there being ten main car parks, some of which are short stay and others long stay. These car parks include: Bank Street (48 spaces); Bethel Street (67 spaces); Church Lane (51 spaces); Commercial Street (24 spaces); Daisy Street (135 spaces); Mill Lane (26 spaces); Mill Royd East (22 spaces); Mill Royd West (26 spaces); Owers Ing (56 spaces); and Parsonage Lane (59 spaces). There is also on-street parking available.

It is free to park on the following car parks: Bank Street; Church Lane; and Mill Lane. For the other car parks, typical pricing is set out below (table 11).

Table 11: Car park pricing

Time (hours)	Price (£)
Up to 1	0.30
1 to 2	0.60
2 to 3	0.90
3 to 4	1.20
4 to 5	1.50
5 to 6	1.80
6 to 7	2.10
7 to 8	2.40
8 to 9	2.70
9 to 10	3.00

Source: Validated by site visit

Public transport: The town centre also benefits from good accessibility by public transport. There is a bus station on Ganny Road. This has planning consent for a £2.38m re-development, which among other things will include 24 hour CCTV surveillance. Buses provide services to Dewsbury, Halifax, Leeds and Sowerby Bridge amongst others. There is also a Railway Station on Railway Street, which provides services to Hebden Bridge, Leeds, Selby and Wakefield.

Environmental Quality

Brighouse is a busy, compact town in Calderdale and is focused on Commercial Street, Bradford Road and Huddersfield Road. Part of Thornton Square is pedestrianised, and the centre is a fairly safe environment for shoppers. Where there is fast moving traffic, pedestrian crossings aid movement by foot. At the time of the survey, there was a medium level of footfall in Brighouse. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards, creating an attractive shopping environment. However, the exception to this is Wellington Arcade, which seemed run down and contained graffiti on the walls. Towards the southern end of the centre is a canal which is particularly attractive. Units are a mixture of old and new build. Street furniture in this area includes: lighting; benches; bins; flowers; and CCTV. There are public toilets in the centre, which are adequately maintained