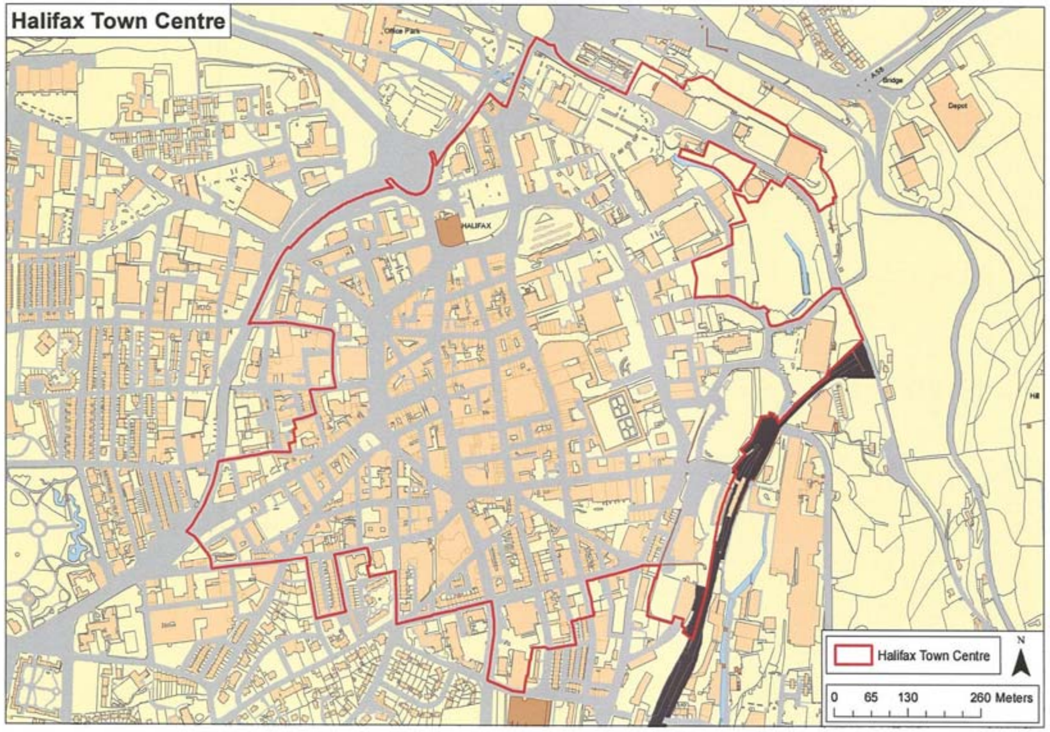
HALIFAX HEALTH CHECK ASSESSMENT

Date of Site Visit: 7 August 2009

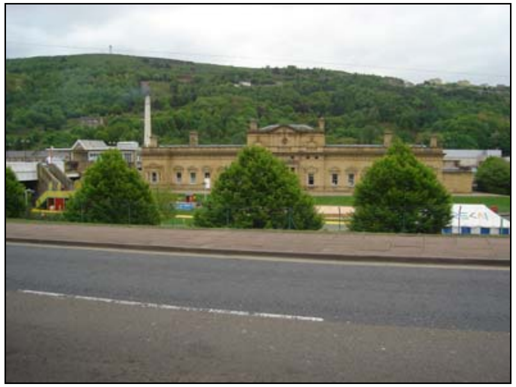
Status: Major Town Centre (Replacement Calderdale UDP 2006)

Figure 32: Town Centre boundary of Halifax Town Centre



Source: Calderdale UDP (2006)

Photographs of Halifax Town Centre (1)



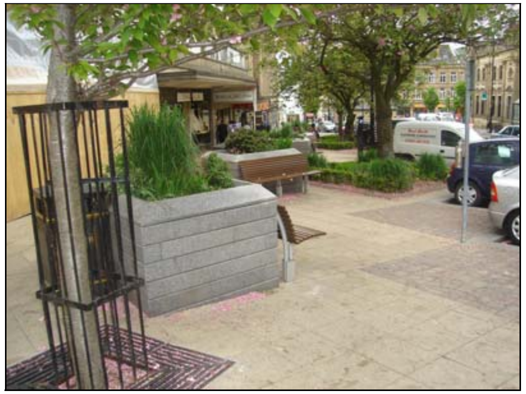


Figure 33 (top left): Railway station, Horton Street
Figure 34 (top centre): Retail frontages, Woolshops Shopping Centre
Figure 35 (top right): Retail frontages, Westgate
Figure 36 (bottom left): Bus station, Winding Road
Figure 37 (bottom right): Attractive street furniture, George Street

Photographs of Halifax Town Centre (2)

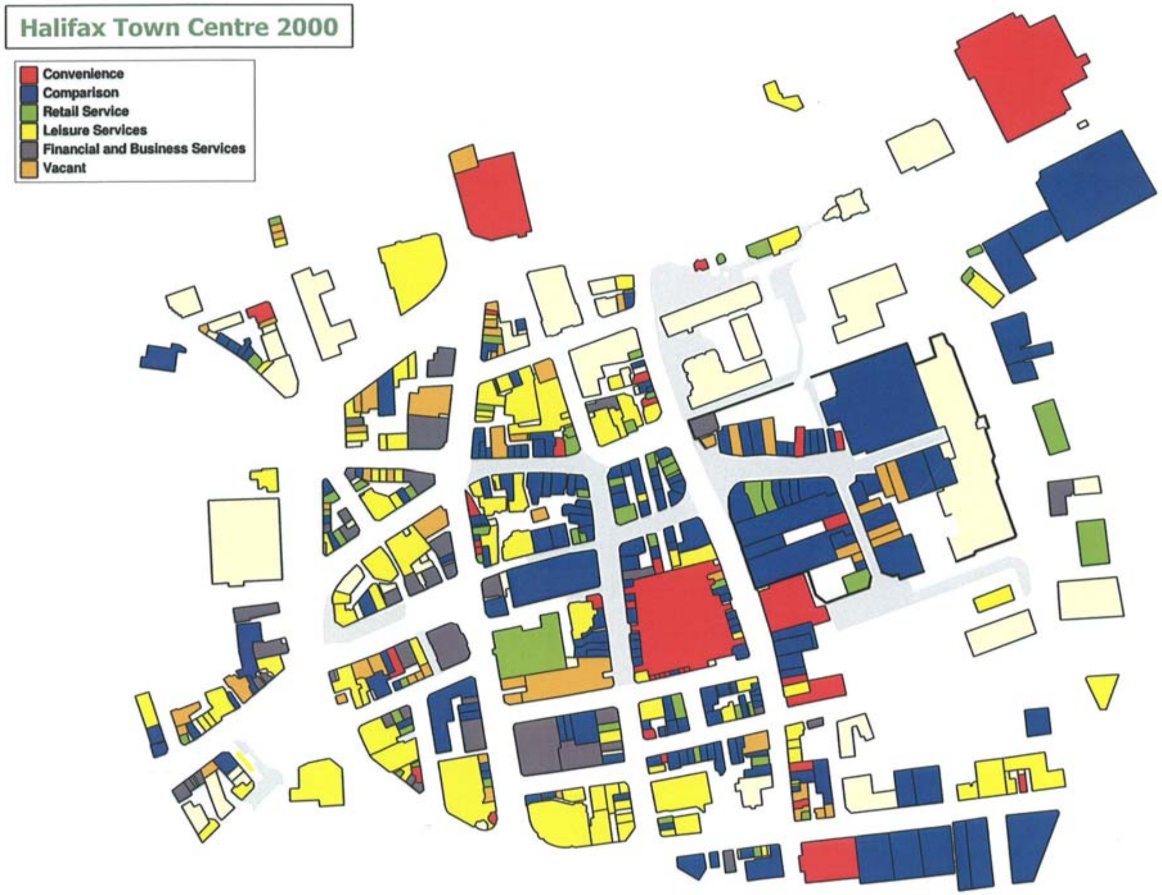
Figure 38 (top left): Car park, Cow Green
Figure 39 (top centre): Signage, Square Road
Figure 40 (top right): Retail frontages, Southgate
Figure 41 (bottom left): Vacant unit, The Square
Figure 42 (bottom right): B & M Bargains, Horton Street

Centre Overview

Halifax is defined as a major town centre by the Replacement Calderdale Unitary Development Plan (August 2006). It is located on the A629, north of the M62, 27 km to the south west of Leeds and 13 km to the north of Huddersfield. According to the 2001 census, Halifax has a population of 82,056.

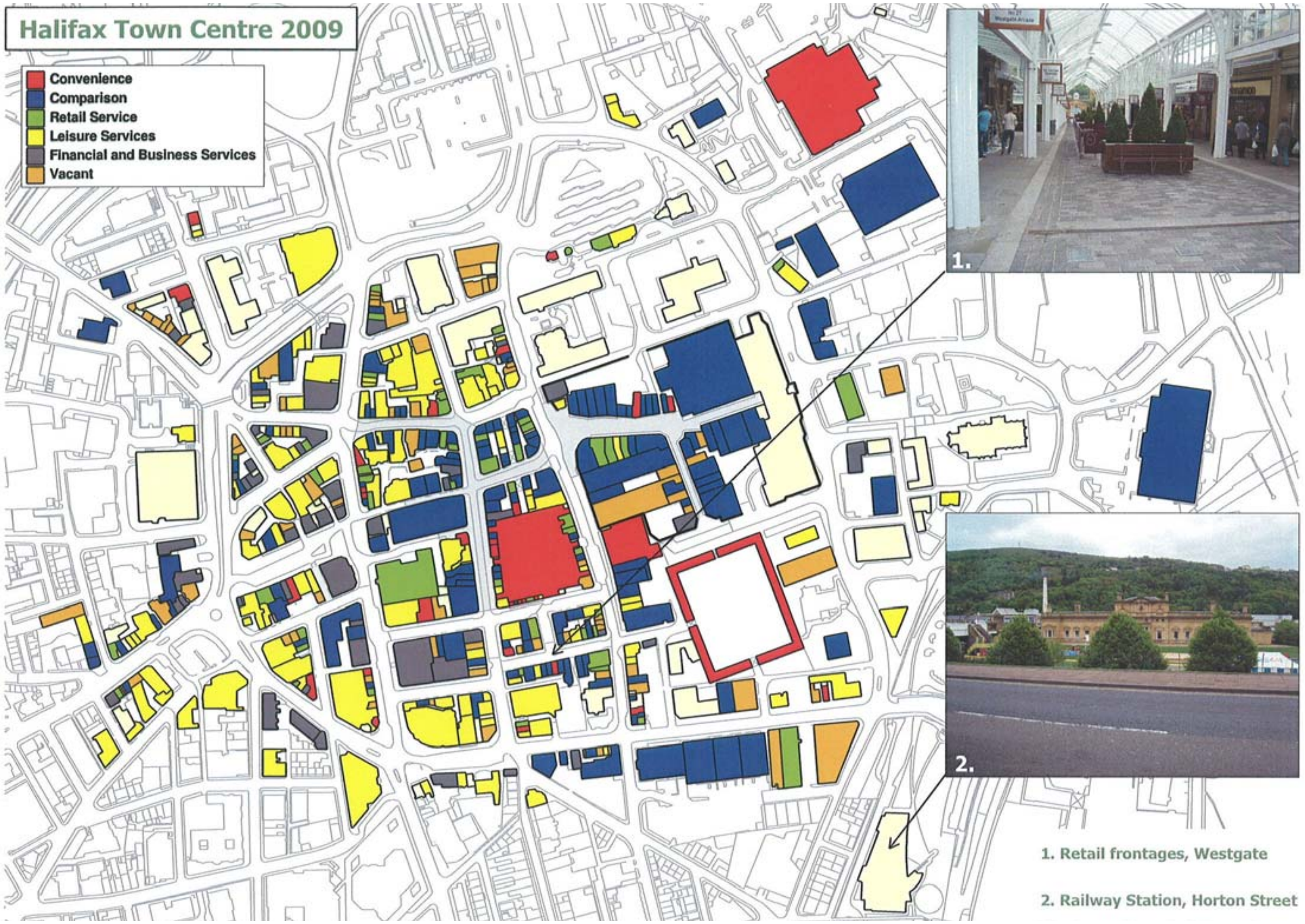
The main focuses of retailing within Halifax are the pedestrianised streets of Cheapside, Cornmarket, Crown Street, Russell Street, Southgate and Woolshops. There are also secondary retail frontages along Commercial Street, Market Street, Northgate and Old Market. A land use plan of Halifax Town Centre as defined by GOAD is set out overleaf.

Figure 43: Land Use map for Halifax Town Centre (2000)



Source: GOAD (November 2000)

Figure 44: Land Use map for Halifax Town Centre (August 2009)



Source: GOAD base validated by August 2009 *site visit*

Table 17: Diversity of Uses in Halifax Town Centre (2000)

	Number of Outlets		
	Number	Halifax (%)	UK (%)
Convenience	41	8.6	9.6
Comparison	169	35.4	38.3
Retail Service	63	13.2	12.1
Leisure Services	107	22.4	17.9
Financial and Business Services	44	9.2	12.2
Vacant	54	11.3	9.8
Total	478	100	100

Source: GOAD Report November 2000

Table 18: Diversity of Uses in Halifax Town Centre (2009)

	Number of Outlets		
	Number	Halifax (%)	UK (%)
Convenience	35	7.4	8.8
Comparison	140	29.6	34.6
Retail Service	57	12.1	13.0
Leisure Services	116	24.5	21.5
Financial and Business Services	50	10.6	11.2
Vacant	75	15.9	10.6
Total	473	100	100

Source: Experian GOAD (August 2009)

Figure 45: Proportion of Units in Halifax Town Centre (2009)

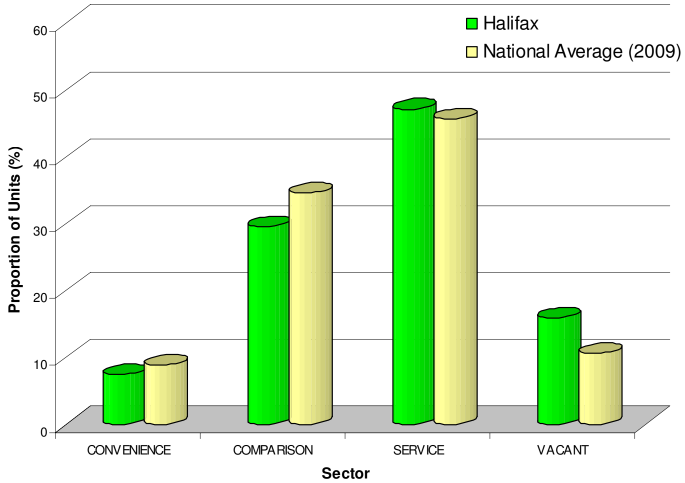


Figure 46: Proportion of Floorspace in Halifax Town Centre (2009)

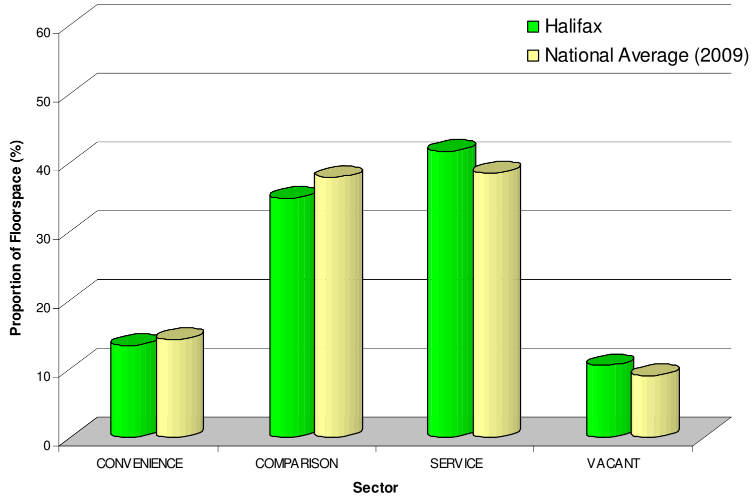


Table 19: Existing Floorspace in Halifax Town Centre (2000)

	Existing Floorspace		
	Sq m	Halifax (%)	UK (%)
Convenience	15,400	15.9	14.4
Comparison	36,860	38.1	40.5
Retail Service	7,650	7.9	7.4
Leisure Services	21,630	22.3	19.8
Financial and Business Services	8,360	8.6	10.5
Vacant	6,890	7.1	7.4
Total	96,790	100	100

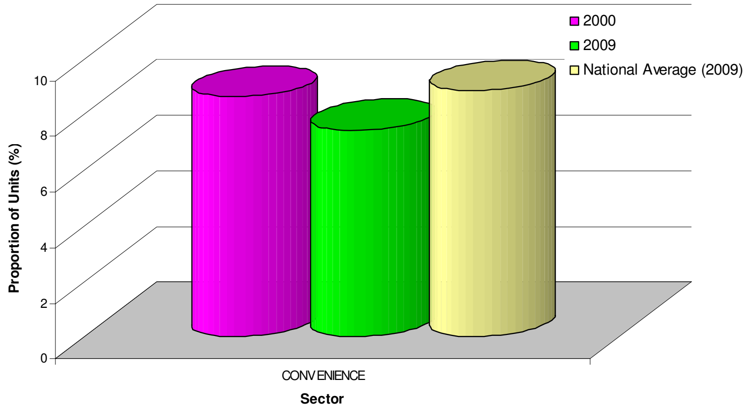
Source: GOAD Report November 2000

Table 20: Existing Floorspace in Halifax Town Centre (2009)

	Existing Floorspace		
	Sq m	Halifax (%)	UK (%)
Convenience	14,830	13.3	14.2
Comparison	38,860	34.7	37.8
Retail Service	7,720	6.9	7
Leisure Services	30,220	27.0	22.7
Financial and Business Services	8,610	7.7	8.7
Vacant	11,650	10.4	8.9
Total	111,890	100	100

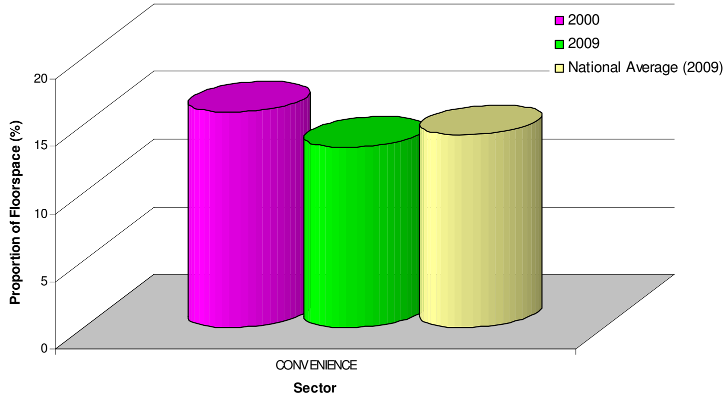
Source: Experian GOAD (August 2009)

Figure 47: Proportion of Convenience Units in Halifax Town Centre



Source: Experian GOAD

Figure 48: Proportion of Convenience Floorspace in Halifax Town Centre



Source: Experian GOAD

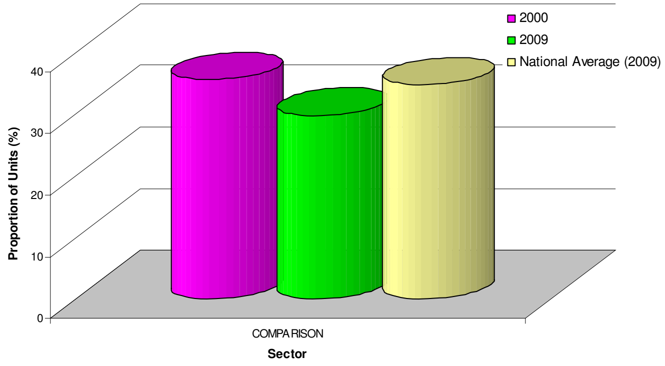
Convenience

In August 2009, 7.4% of all the units in Halifax were in use for the sale of convenience goods. This compares to a national average of 8.8%. The proportion of convenience floorspace is marginally below the national average (13.3% compared to 14.2% nationally). Therefore, there are an average number of convenience outlets and it would appear that these tend to be of a good size. At present, this sector is dominated by Sainsbury's at Wade Street Retail Park and the Tesco Metro on Market Street. Other convenience traders in the centre are: Fultons on King Edward Street; and a number of independents including eight 'CTN' stores, five 'bakers' and four 'fishmongers'.

There is an open market on Thomas Street every Thursday and Saturday. In addition, there is an indoor market on Market Street which is open Monday to Saturday.

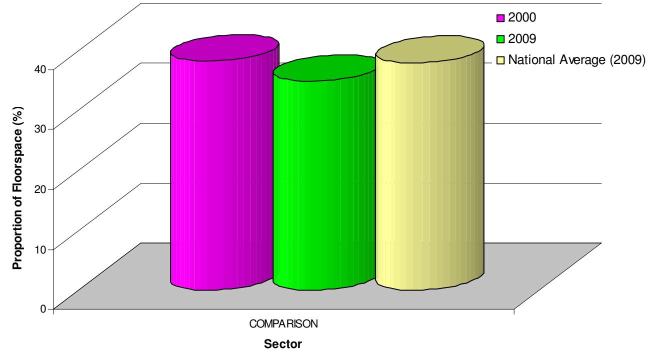
Table 17 indicates that in 2000 there were 41 convenience retailers in the town centre accounting for 15,400 sq m of retail floorspace. In the nine year period since, the number of convenience operators in Halifax has declined by six units, whereas the amount of convenience floorspace has declined by 570 sq m. This decrease in floorspace is relatively minor, and does not materially affect Halifax's convenience provision.

Figure 49: Proportion of Comparison Units in Halifax Town Centre



Source: Experian GOAD (August 2009)

Figure 50: Proportion of Comparison Floorspace in Halifax Town Centre



Source: Experian GOAD (August 2009)

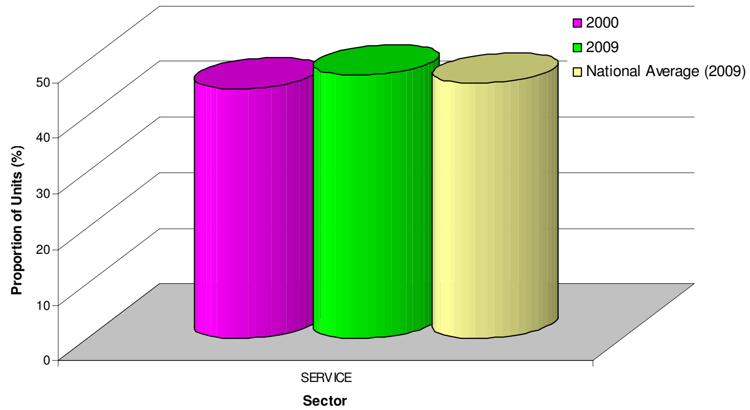
Comparison

Comparison traders in Halifax occupy 29.6% of the total outlets against a national average of 34.6%. In addition, when it comes to the proportion of comparison goods floorspace, Halifax is below the national average with a figure of 34.7% compared to a national average of 37.8%. Since 2000, the number of comparison units has decreased by 29, despite the level of floorspace increasing by 2,000 sq m.

Overall Service

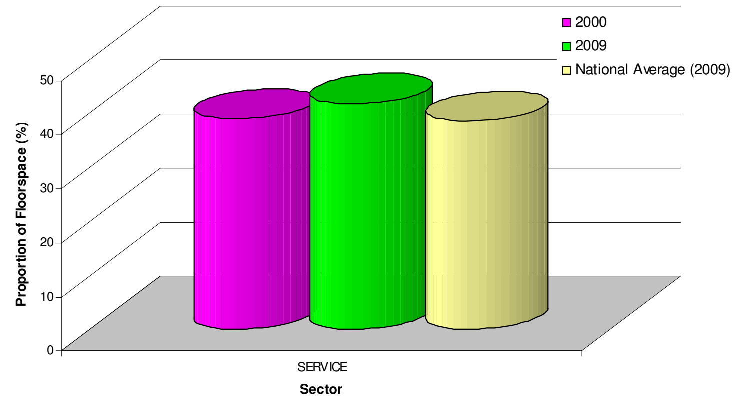
In August 2009, the service sector comprised 223 units and occupied 46,550 sq m of floorspace. The proportion of service outlets (47.2%) is above the national average (45.7%) as is the proportion of service floorspace (41.6% compared to 38.4%). The results demonstrate the strong service provision in the centre.

Figure 51: Proportion of Service Units in Halifax Town Centre



Source: Experian GOAD

Figure 52: Proportion of Service Floorspace in Halifax Town Centre



Source: Experian GOAD

Retail Service

Retail services, which comprise uses such as hairdressers, dry cleaners and petrol filling stations, account for 12.1% of outlets and 6.9% of floorspace in Halifax, which compares to a national average of 13% and 7% respectively. 'Health and beauty' traders are particularly dominant in this sector, accounting for 30 (or 54%) of all retail service outlets. The town contains a Post Office on Commercial Street.

Leisure Services

Leisure services as defined by GOAD include uses such as restaurants, cafes, bookmakers and public houses. Halifax is well provided in this sector with both the proportion of outlets (24.5%) and the proportion of floorspace occupied (27%) being above the national average (21.5% and 22.7% respectively). The most common uses in this sector include public houses (27 units), fast-food and takeaway units (26) and cafes (21 units).

Financial Services

In terms of the proportion of units occupied by financial and business services the figures closely reflect the national average occupying 10.6% 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; Leeds Building Society; Lloyds TSB; Nat West; Nationwide Building Society; The Royal Bank of Scotland; Yorkshire Bank; and Yorkshire Building Society.

Non Retail

In addition to the retail services on offer, there is a library, two religious institutions and three educational institutions. Furthermore, Halifax town centre is surrounded by dense residential areas. In fact, many of the retail units have apartments situated above them.

Top 20 Retailers

Of the list of 'Top Twenty Retailers' as identified by GOAD, Halifax accommodates nine of the top 20 businesses within the Town Centre, including: Boots; Marks and Spencers; Argos; WH Smith; Superdrug; Wilkinson; New Look; and Dorothy Perkins.

Table 21: 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 22 below highlights the composition of Halifax 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 22: Size of Units

Size of Unit (ground floor area)	Number of units	Proportion of Total (%)	
		Halifax	GB
Under 93 sq m (1,000 sq ft)	244	51.6	39.1
93-232 sq m (1,000-2,499 sq ft)	120	25.4	39.6
232-464 sq m (2,500-4,999 sq ft)	61	12.9	12.6
465-929 sq m (5,000-9,999 sq ft)	28	5.9	5.1
929-1,393 sq m (10,000-14,999 sq ft)	10	2.1	1.5
1,393-1,858 sq m (15,000-19,999 sq ft)	3	0.6	0.7
1,858-2,787 sq m (20,000-29,999 sq ft)	2	0.4	0.7
Above 2,787 sq m (30,000 sq ft)	5	1.1	0.8
Total	**473**	**100**	

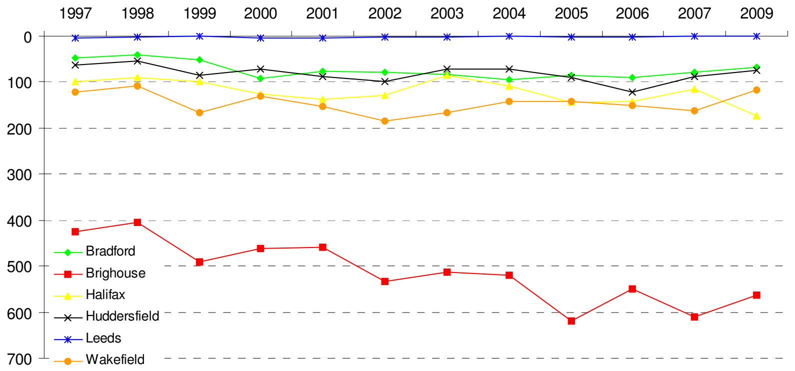
Source: Experian GOAD 2009

Halifax has a large proportion of small units less than 93 sq m (51.8%) compared to the national average (39.1%). For the other categories, Halifax appears to reflect national averages although there is a slight over-representation of units above 2,787 sq m.

Retail Demand

Halifax's retail ranking based on retailer demand has varied since 1997. However; in general terms, its ranking has gradually fallen in recent years reflecting trends in Bradford, Brighouse, Huddersfield and Wakefield. Only Leeds has witnessed a constant ranking recently.

Figure 53: Retail Ranking in Calderdale Catchment



Source: Focus Report (August 2009)

Retailer Requirements

Table 23: Retailer Requirements

	Number of Requirements	Minimum Floorspace (sq m)	Maximum Floorspace (sq m)
Convenience	2	195	325
Comparison	8	4,116	16,722
Service	9	4,889	12,662
TOTAL	**19**	**9,200**	**29,709**

In August 2009 there were 19 retailers seeking representation within Halifax, collectively requiring up to 29,709 sq m (gross) in retail floorspace. Service traders account for the highest number of requirements in outlet terms (9), though the comparison sector are seeking the highest amount of floorspace (16,722 sq m gross).

Table 24: Vacancies' in Halifax (2000)

	Vacancy		
	Total	Halifax (%)	UK (%)
No. of Outlets	54	11.3	9.8
Floorspace	6,890	7.1	7.4

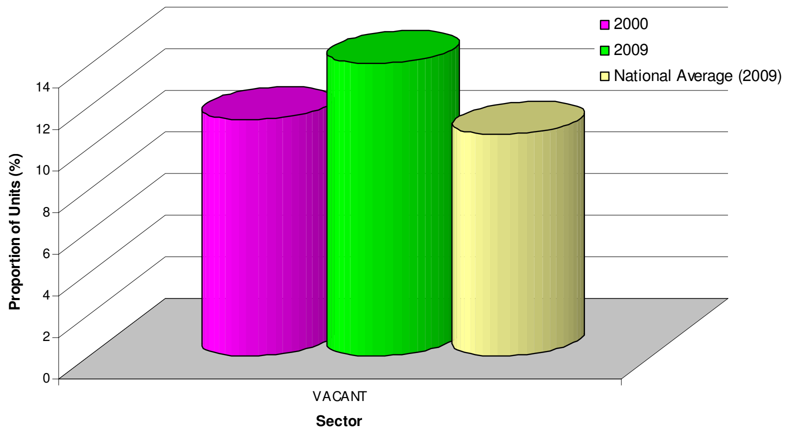
Source: GOAD Report November 2000

Table 25: Vacancies' in Halifax (2009)

	Vacancy		
	Total	Halifax (%)	UK (%)
No. of Outlets	75	15.9	10.6
Floorspace	11,650	10.4	8.9

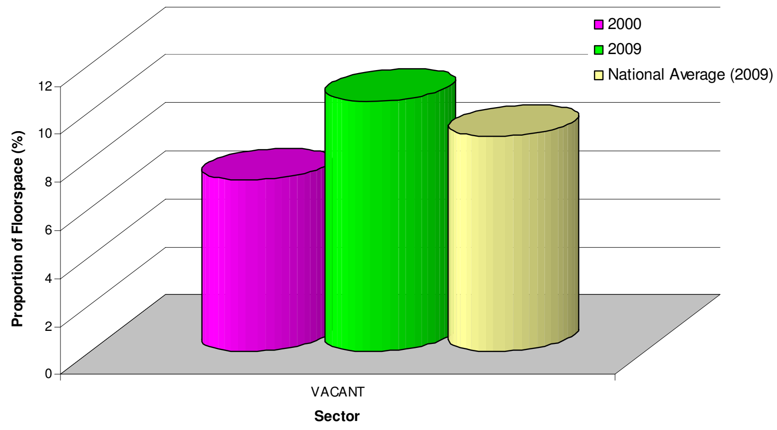
Source: Experian GOAD August 2009

Figure 54: Proportion of Vacant Units in Halifax Town Centre



Source: Experian GOAD

Figure 55: Proportion of Vacant Floorspace in Halifax Town Centre



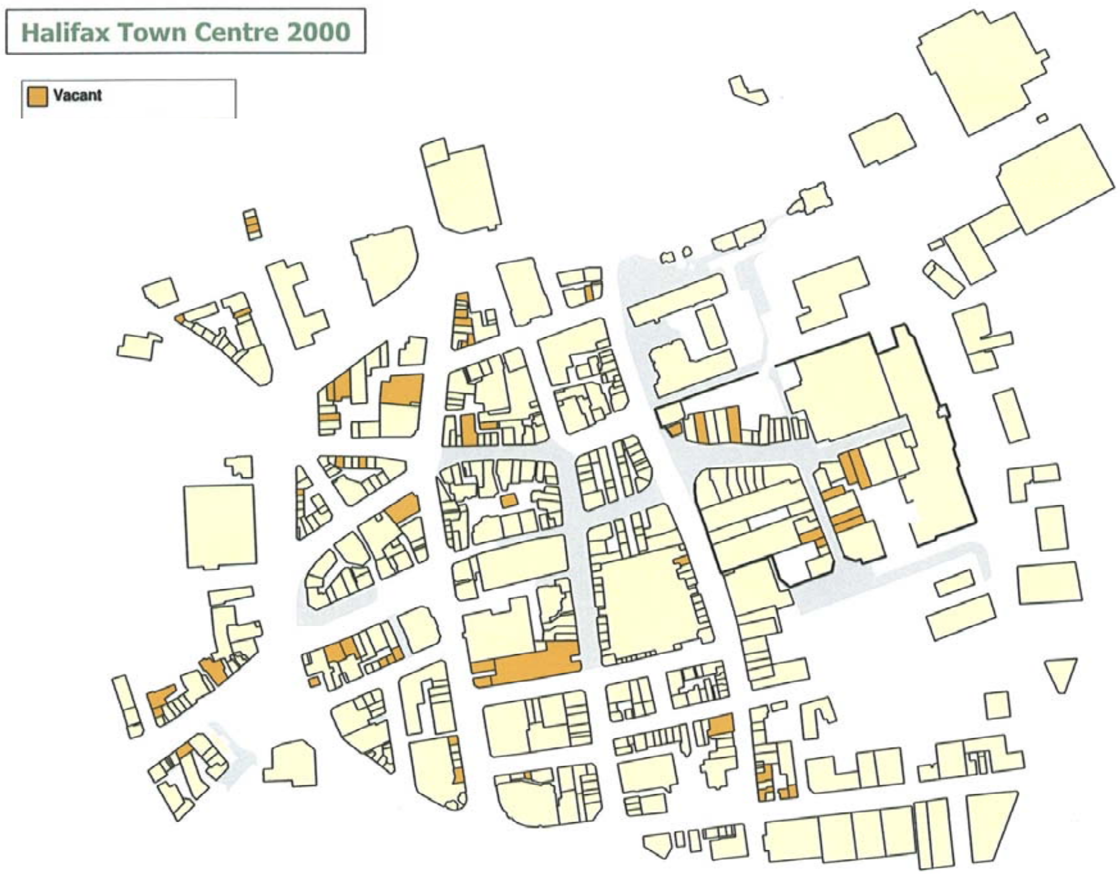
Source: Experian GOAD

Vacancies

Table 25 illustrates that in August 2009 there were 75 vacant retail units in the town centre, which accounted for 11,650 sq m of floorspace. This represents 15.9% of all outlets and 10.4% of floorspace, compared to respective national averages of 10.6% and 8.9%.

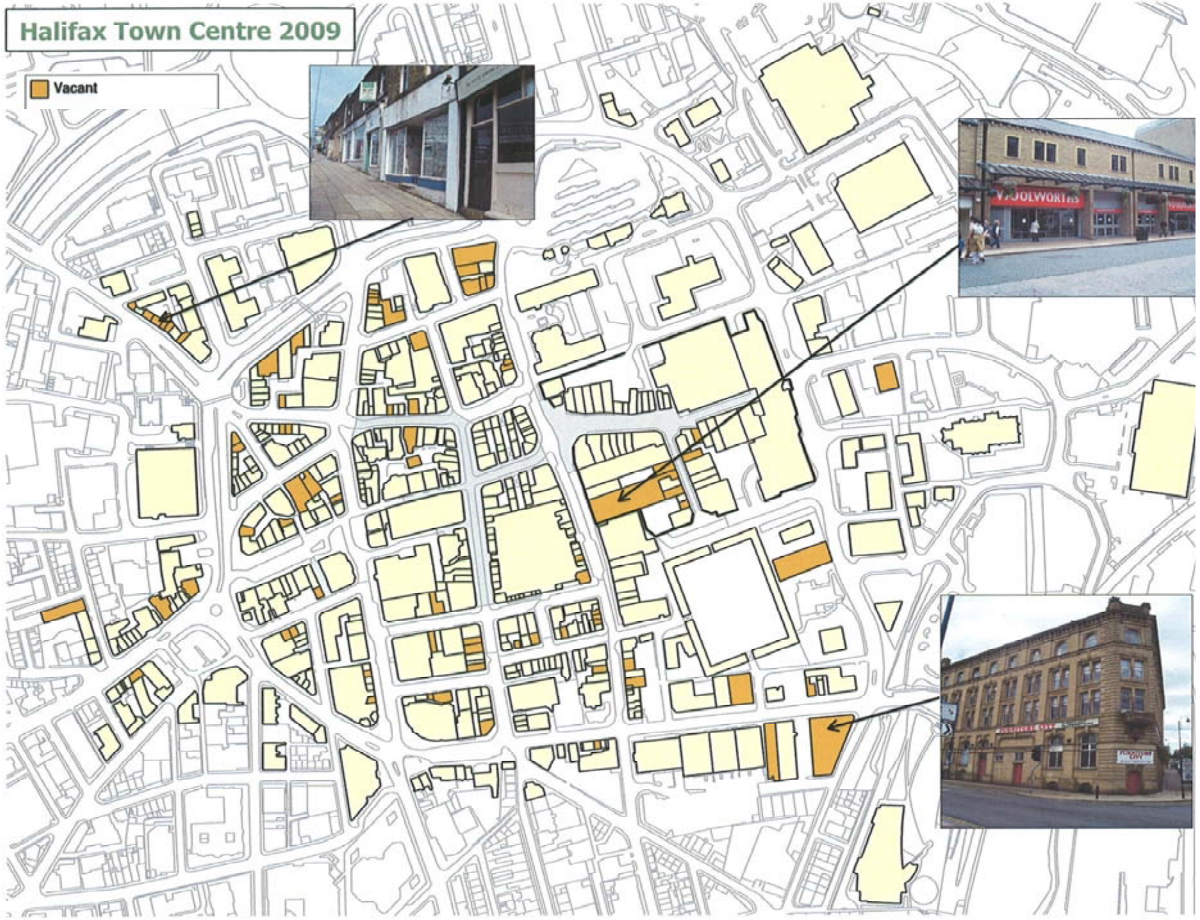
Since 2000, the number of vacant units has increased by 21 units. In addition, the level of floorspace has increased, from 6,890 sq m in 2000 to 11,650 sq m in 2009, (an increase of 4,760 sq m). The Netto supermarket has been demolished, and more recently, the Woolworths store has been closed. It was noted on the site visit that several small vacant retail units include 'Halifax in Bloom' and local advertising posters in their windows.

Figure 56: Vacancies in Halifax Town Centre (2000)



Source: GOAD (November 2000)

Figure 57: Vacancies in Halifax Town Centre (August 2009)



Source: GOAD base validated by WYG August 2009 *site visit*

Rents

Table 26 identifies the changes in Zone A rents in Halifax Town Centre between 1998 and 2006 and compares them to other nearby centres.

Table 26: Prime Pitch Zone A Rents (£/sq m)

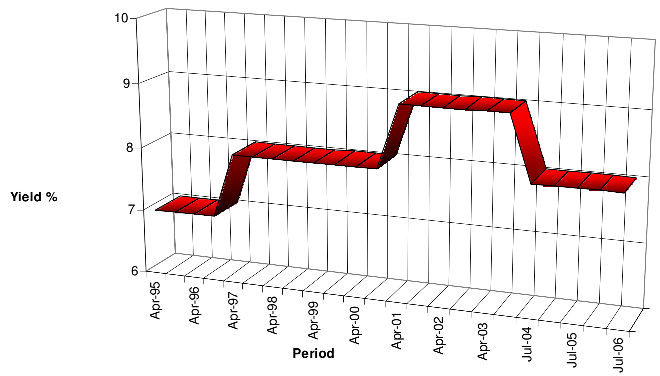
Centre	June '99	June '00	June '01	June '02	June '03	June '04	June '05	June '06	June '07	%
Bradford	1,130	1,507	1,507	1,507	1,507	1,507	1,507	1,507	1,615	43
Halifax	**915**	**915**	**915**	**915**	**915**	**969**	**969**	**1,023**	**1,023**	**12**
Huddersfield	969	1,076	1,130	1,130	1,130	1,130	1,130	1,184	1,184	22
Leeds	199	220	220	242	248	248	258	269	269	35
Rochdale	1,023	1,023	1,023	1,023	1,023	1,023	1,076	1,076	1,076	5
Wakefield	969	969	969	1,076	1,130	1,238	1,238	1,238	1,238	28

Source: Focus Town Centre Reports (2008) based on Colliers CRE's opinion of open market Zone A rents

Zone A rents for Halifax Town Centre have increased by 12% since June 1999, from £915/sq m to £1,203/sq m in June 2007. In comparison to other nearby centres only Rochdale has witnessed a smaller decrease between 1999 and 2007.

Yields

Figure 58: Retail Yields in Halifax



Apr-95	Oct-95	Apr-96	Oct-96	Apr-97	Oct-97	Apr-98	Oct-98	Apr-99	Oct-99	Apr-00	Oct-00	Apr-01	Oct-01	Apr-02	Oct-02	Apr-03	Jan-04	Jul-04	Jan-05	Jul-05	Jan-06	Jul-06
7	7	7	7	8	8	8	8	8	8	8	8	9	9	9	9	9	9	8	8	8	8	8

Source: Valuation Office Agency (VOA): Property Market Report (PMR), May 2008.

The commercial yield of Halifax has been identified to fluctuate between 7% and 9%. Although commercial yields increased between April 1995 and April 2001, where it remained stable at 9% to January 2004, in recent years the commercial yields has reduced to 8% reflecting a perceived increase in investor confidence in Halifax Town Centre.

In Street Survey Results

Accessibility

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

- Just over half (51%) of visitors to Halifax had no access to a car for personal use during the daytime. During the evening/ night-time, the proportion of visitors who did not have access to a car for personal use was 48%;
- 39% of visitors arrived in the centre by bus, minibus or coach, with a further 34% arriving by car or van (either as driver or passenger). 22% of visitors walked to the centre;
- Of those visitors who drove, the most popular place to leave their vehicle was at the Sainsbury's store with 13% of drivers parking here. 12% of visitors parked on-street;
- 82% of drivers did not encounter any difficultly when obtaining a car parking space on the day of the survey;
- 49% of visitors travelled for 10 minutes or less to reach the centre. An additional 24% travelled for between 11 and 15 minutes, with 13% travelling for between 16 and 20 minutes and 6% for between 21 and 30 minutes. Only 2% of visitors travelled for over an hour to reach the centre;
- Visitors were asked to consider car parking provision in Halifax. Of those that answered this question, 32% deemed this to be 'about the same' as that in other centres;
- In terms of car parking prices, 27% considered prices to be 'about the same' as in other centres; and
- Accessibility by public transport was stated by 52% of visitors as being 'about the same' as in other centres, although 19% felt that this was 'better' or 'much better' in Halifax than in other shopping centres.

Perception of Safety and Occurrence of Crime

The on-street visitors survey asked specific questions to visitors about their perceptions of crime in Halifax. During the day-time , some 74% of visitors indicated that safety in Halifax was 'about the same' as that in other centres, with 16% 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 38%, with some 25% 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 30% 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:

- 89% of visitors to the city had travelled directly from home;
- Most of those shoppers interviewed (69%) were just visiting the centre, with 19% living in the centre and the remaining 14% working in the centre;
- The main reasons why visitors indicated that they were in the centre were: food and grocery shopping (21%), to visit the bank/ building society/ Post Office (15%), due to work/ school/ college (15%) and clothes/ shoes shopping (10%);
- 24% of visitors planned to stay in the centre for up to half an hour, with a further 57% planning to stay in the centre for up to two hours and 9% planning to stay in the centre all day;
- The majority of visitors (67%) 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, 35% of respondents stated that they planned to purchase clothing, footwear or household goods;
- 43% of visitors stated that they visited Halifax 'about as frequently' today as compared to five years ago. 29% stated that they visited the centre 'more' or 'much more frequently' than five years ago; and
- 62% of visitors indicated that they did not visit the centre during the evening.

Visitors to Halifax 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 Halifax by the largest proportion of visitors. Notwithstanding this, areas of weakness were seen to be the choice of shops, which 57% of visitors rated as being either 'worse' or 'much worse' than other centres, the quality of shops (46% stating that this was worse than elsewhere), leisure facilities (40%) and entertainment/ events/ performances (30%).

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 (44%) and department stores (31%). Visitors were also asked about the types of leisure facilities they would like to see more of in the centre. Popular responses were a cinema (53%), a swimming pool (11%) and a health and fitness centre (10%).

Business Survey Results

A questionnaire was distributed to all local businesses within Halifax by WYG in conjunction with Calderdale Council in order to gain an understanding of the opinions and views of retailers. A total of 884 questionnaires were distributed with 148 bring returned: a response rate of 17%. The main findings of the business survey results were as follows:

- 44% of respondents had been trading in the town centre in excess of twenty years, with some 21% having been in operation for over ten years and 2% for under one year;
- 79% of respondents were independent traders, with 21% being part of a national group or chain;
- 32% of respondents indicated that they were professional services, 29% being non-food retailers, 17% being food retailers, 13% being leisure services and 9% being retail services;
- Most businesses (52%) employed between one and five members of staff;
- Half of traders stated that since they begun trading business had either 'grown significantly' or 'grown moderately', with 23% indicating that business had 'remained largely static'. 27% indicated that their business had declined to some degree since they began trading;

▪ 43% of respondents indicated that their business was currently trading 'moderately' with 41% stating that their business was currently performing either 'very well' or 'well' illustrating strong performance; ▪ The majority of respondents (68%) leased their premises; ▪ The survey indicated that 40% of traders relied upon local residents primarily for the majority of their business, although a further 37% relied primarily on residents in the wider Calderdale area and 15% on office employees. 8% relied mainly on tourists; ▪ When asked about measures that would improve the town centre, 76% of respondents stated that an increased choice/ range of shops would have this affect. Other important measures included more parking (72%), public toilets (63%) and more independent/ specialist traders (62%); ▪ 49% of respondents felt that there was a good balance between shops and other non-retail uses, with 41% stating that there were too many non-retail uses in the town centre and 11% that there were not enough non-retail uses; ▪ Respondents identified the main barriers to trading performance as being inadequate customer car parking (57%), high rents/ overheads (45%) and a lack of passing trade outside premises (36%); ▪ A little over half of respondents (51%) indicated that they had no plans to alter their business in any way over the next five years, with a further 12% planning to refurbish their existing floorspace; ▪ 32% of respondents considered that shop front improvement grants would help their businesses; ▪ The largest proportion of respondents (45%) considered Huddersfield to be their biggest competitor.	The business survey asked respondents to rate a number of different aspects of Halifax 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: car parking (72%), public toilets (68%), location and quality of car parks (58%) and special events (41%). 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 more car parks. On a positive note, certain retailers felt that while the centre is generally performing well, cleaner streets and better lighting would further improve the appearance of Halifax.

Accessibility

Car: Halifax is situated on the A629, which connects to Leeds to the north east and Huddersfield to the south. The M62 (Junction 24) is nearby. To the north of the centre is a busy road (Broad Street); however a subway (which is in need of refurbishment) and pedestrian crossings are provided to aid pedestrians.

Car parks: Parking is plentiful in Halifax, with their being fourteen main car parks which are a mixture of short and long stay. These car parks include: Broad Street (283 spaces); Bull Green (39 spaces); Cow Green (226 spaces); Cross Hills (11 spaces); Hanover Street (27 spaces); High Street (238 spaces); King Street (48 spaces); Mulcture Hall Road (167 spaces); North Bridge (367 spaces); Northgate House (35 spaces); Prescott Street (22 spaces); St Johns Lane (27 spaces); Union Street (35 spaces); and Victoria Street (29 spaces). There is also lots of on-street parking available. Typical pricing is set out below (table 27).

Table 27: 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 also benefits from good accessibility by public transport. There is a bus station on Winding Road. Buses provide services to Dewsbury, Elland, Leeds and Sowerby Bridge amongst others. There is also a railway station on Horton Street, which provides services to Blackpool, Leeds, Manchester, Wakefield and York. There is also a taxi rank on Market Street.

Environmental Quality

Halifax is a very attractive, busy, large town set in a valley. The town is focused on Cheapside, Cornmarket, Crown Street, Russell Street, Southgate and Woolshops. These streets in particular are pedestrianised, which provide a safe environment for shoppers. Cow Green, to the west of the centre is on a steep hill, making it difficult for some groups to negotiate. At the time of the survey, there was a high level of footfall in Halifax. Pavements are wide, and where the centre meets busy roads, pedestrian crossings aid movement by foot. The streets are clean with no evidence of litter, whilst shop units themselves are maintained to high standards, creating an attractive shopping environment. Units are a mixture of old and new build and most are made of local stone. Street furniture is plentiful and includes: lighting; benches; bins; bike racks; and flowers. Furthermore, Halifax has a good level of signage. It should be noted that there are adequately maintained public toilets in the centre.