

WYG Planning & Design

part of the WYG group



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APPENDICES BOUND UNDER A SEPARATE COVER



1.0 INTRODUCTION

Objectives of the Study

- 1.01 WYG Planning & Design (WYG) was commissioned by Calderdale Council in March 2008, to undertake a comprehensive assessment of current and future capacity for retailing in Calderdale. This study is to inform the preparation of the Council's Local Development Framework (LDF) and will form part of the evidence base. In response to the Tender Brief, the report addresses the following objectives:-
- Quantify shortfall/surplus of convenience and comparison shopping floorspace in the study area for 2009, 2014, 2019 and 2026 with reference to development commitments, spend trends/patterns and retail trading characteristics;
 - Assess the sensitivity of the above on the basis of alternative assumptions on spending and development trends;
 - Review the current status and role of Halifax and other town centres to determine their position in Calderdale's retail hierarchy;
 - Identify the town centre the primary retail area (particularly in Halifax) against which 'edge-of-centre' proposals should be assessed in accordance with PPS6;
 - Consider the need for and advise on the location of primary and secondary retail frontages within the centres, and the proportions of non-retail uses that may be appropriate;
 - Identify deficiencies in retail provision assessing the capacity of existing centres to accommodate new development, and identify centres in decline where change needs to be managed and make proposals for such management;
 - Make recommendations on retail capacity within the town centres (floorspace, location, optimum unit sizes) to inform future policy;
 - Identify sites that could be allocated within the LDF for retail use.
- 1.02 As a result, this study includes an in-depth analysis of the retail provision within the District's main centres; an assessment of the extent to which those centres are meeting the retail needs of the local area population and their role in the local shopping network and the sub-regional shopping hierarchy.



1.03 In undertaking the study, consideration has been made with regard to the relevant advice contained in Planning Policy Statement 6 (PPS6) 'Planning for Town Centres' as well as emerging guidance set out in Draft PPS4 'Planning for Sustainable Economic Development'.

1.04 The study is set out as follows:

Section 2: Considers current emerging trends in the retail sector;

Section 3: Provides an overview of current and emerging planning legislation in respect of town centres and retail development;

Section 4: Reviews the market research undertaken and how this influences the main findings of the study;

Section 5: Considers the vitality and viability of the defined main centres within Calderdale;

Section 6: Reviews the findings of the household survey undertaken and assesses shopping patterns for a variety of good types (i.e. convenience, comparison goods);

Section 7: Undertakes an assessment of the level of retail expenditure growth in convenience and comparison goods within the defined study area.

Section 8: Assesses the retail capacity within Calderdale and within each of the defined town centres against their role and function.

Section 9: Sets out the report's principal conclusions.



2.0 CURRENT AND EMERGING RETAIL TRENDS

Introduction

- 2.01 The retail property landscape across the UK has changed significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of the retail warehouse parks and out-of-town regional shopping malls.
- 2.02 During this time, the retail and leisure sectors have both experienced considerable growth. Spending on retail goods has increased significantly over the past decade, particularly spending on comparison (or non-food) goods. This expenditure growth is attributable to a number of factors, including greater disposable income, cheaper prices and new technology.
- 2.03 The retail market is continually changing as a result of shifts in demographics, increasingly restrictive planning policies and technological advancements, such as e-tailing. These changes have a subsequent impact on the format of retail and leisure floorspace. Research undertaken by the British Council of Shopping Centres ('Future of Retail Property', 2006/7) indicates that retail development is increasingly being directed towards town centres, with the proportion of new retail floorspace being developed in centres in England rising from 14% in 1994 to 35% over the period 1999 to 2005. This increase exemplifies the Government's 'town centres first' policy approach.

Current Retail Picture

- 2.04 Research undertaken by CBRE (Midsummer Retail Report, June 2008) provides information on recent trends together with forecasts for the future of retailing in the UK. The research identifies that although the UK has seen impressive economic growth in recent times, the prospects for 2009 are weak for the retail sector and the UK economy as a whole. The impact of the 'credit crunch' on the UK retail market has been swift and consumer confidence, along with footfall across the country's high streets and shopping centres, has been hit.
- 2.05 A number of retailers have fallen into administration and, with large scale closures and new development flooding the market, Zone A rental levels are generally falling. CBRE states that, due to the challenging trading conditions, there are currently very few retailers looking to expand



rapidly and that incentives offered in order to make retail units more attractive will continue to rise in shopping centre and mid-market locations.

- 2.06 Whilst it is anticipated that the current slow down in the economy will not last significantly beyond 2010, it is notable that Oxford Economics, which identifies the latest retail consumer expenditure in the UK, has significantly revised its forecast growth rates for comparison goods expenditure. Its forecast annual per capita comparison growth rate to 2012 has been reduced from +5.0%¹ to +0.3%², after assessing the implications of the current 'credit crunch'. This represents a significant reduction in the forecast growth of comparison goods expenditure from that experienced in recent years.
- 2.07 In line with the above expectations, it has been widely reported that a number of high street retailers suffered poor trading figures during the latter part of 2008, resulting in many operators selling heavily reduced goods. Despite heavy discounting over the festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a number of retailers fell into administration around the end of 2008 and the early part of 2009, including Woolworths, Adams, Zavvi, The Pier and Whittards of Chelsea. Further losses to the high street are expected during 2009.
- 2.08 Despite the difficulties set out above and the general decline in the comparison goods sector, specific types of goods continue to perform well. The market for recreational goods (including DVDs, CDs, toys, computers and books) has performed well in recent years, with healthy growth attributed to supermarket sales together with the growing popularity of online shopping, which continues to see an increase in sales year-on-year.
- 2.09 Convenience goods expenditure, although suffering a downturn and a slight negative per capita forecast growth rate, is not predicted to be the subject of as great a decrease in percentage points terms as comparison goods expenditure. Oxford Economics' most recent forecasts suggests an

¹ Average annual per capita comparison goods growth rate between 2005 and 2012 provided by Oxford Economics in MapInfo Information Brief 07/02, published September 2007

² Average annual per capita comparison goods growth rate between 2009 and 2012 provided by Oxford Economics in its Revised Retail Spending Outlook, published March 2009



annual per capita convenience growth rate to 2012 of -0.04%³, compared to a previous forecast of +1.5%⁴.

- 2.10 Perhaps as a consequence of these conditions, discount convenience retailers such as Aldi have seen a notable increase in sales during 2008 and are looking to expand their portfolio in 2009. Similarly, Iceland has also seen an increased performance and has recently purchased a number of former Woolworths stores as it seeks to expand. Conversely, Marks & Spencer has not performed as well, resulting in the proposed closure of 27 of its Simply Food stores throughout the UK, although it is still committed to opening a number of new stores elsewhere.

Trends in Comparison Goods Shopping

- 2.11 Whilst it is anticipated that growth in retail spending over the next ten years will not mirror that of the last decade, there will continue to be some growth in comparison goods expenditure. Consequently, there is increasing impetus from retailers to achieve more efficient use of floorspace, particularly given the recent poor performance of many national multiples, many of which have been affected by the significant increase in e-tailing. As a consequence of their recent performance, retailers are more reluctant to commit to new development than they have been in previous decades. Instead, they are more selective and are holding out for accommodation that is appropriate both in terms of location and the type of premises provided. Indeed, retailers are seeking to occupy larger units in order to achieve more efficient use of floorspace and attract shoppers from a wider area. These larger floor plate stores enable retailers to provide a greater range of goods.
- 2.12 There will continue to be demand for larger, modern retail units in the future, although increased sensitivity over future viability will mean a cautious approach to new investment for many key national retailers. Marginal locations within centres will increasingly be rejected. Whilst many national retailers would previously consider smaller/lower order centres in order to increase their market share, the ongoing downturn in the economy has resulted in a number of retailers assessing the performance of existing stores and the potential closure of underperforming stores. Consequently, many investment decisions will be influenced by the scale of commitment from other

³ Average annual per capita convenience goods growth rate between 2009 and 2012 provided by Oxford Economics in its Revised Retail Spending Outlook, published March 2009

⁴ Average annual per capita convenience goods growth rate between 2005 and 2012 provided by Oxford Economics in MapInfo Information Brief 08/02, published January 2009



retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

2.13 In the aftermath of the growth in the number of edge and out-of-centre large format supermarkets during the 1990s, development of such facilities is now more limited due to stricter planning laws, following the publication of PPS6, and a lack of suitable sites. As a result, the national multiples in the food retailing sector are finding a range of other measures to improve their market share. These include:

- Offering a wider product range, such as financial and insurance products, petrol and non-food goods;
- Developing a wider range of outlets, for example small-format convenience stores in town centres (e.g. Sainsbury's Local, Tesco Express), smaller supermarkets mostly in town centres (e.g. Tesco Metro), superstores (e.g. Tesco) and hypermarkets (e.g. Tesco Extra, Asda Supercentres);
- Extended opening hours;
- Offering cheap products and no-frills service;
- Providing an attractive and powerful brand image; and
- Offering a home delivery service.

2.14 Verdict (2009)⁵ estimates that the food and grocery market was worth £124.1bn in 2008. Verdict identified that in 2008 food and grocery specialists defied wider retail market gloom, increasing their combined sales by 5.0%.

2.15 Verdict identifies that the 'credit crunch' and subsequent recession, allied with a bout of inflation have had a profound impact on consumer behaviour and the wider dynamics of grocery retailing. Price, or specifically value, is now identified as the key issue for consumers and more and more shoppers are looking at value for money. Consequently, supermarket operators have responded with new products at lower prices. The focus has shifted towards lower price point products. For example Tesco has launched its Discount range.

⁵ Verdict – UK Grocery Retailers, April 2009



- 2.16 Given the recent success of the food and grocery market, during 2008 retailers' total space increased by 1.3%, delivering an additional net 1.5m sq ft of new floorspace (Verdict 2009). The 'Big Four' (Asda, Morrisons, Tesco and Sainsbury's) have been highly active in both new store openings and extensions, particularly from Morrisons and Sainsbury's. In addition, Verdict also identifies that Waitrose, Iceland and hard discounters, such as Aldi and Lidl, have been particularly busy in developing more retail floorspace.
- 2.17 Hard discounters such as Aldi and Lidl appear to have benefitted from the recessions, opening new store and increasing their market share, including a proportion of more affluent ABC1 shoppers (Verdict 2009).
- 2.18 Verdict highlights that non-food growth, for Tesco and Asda in particular, was focused on the non-food market. However, this sector has been hit during 2008. Despite this, the non-food sector remains crucial to the growth of leading supermarket operators. Verdict anticipate that new space, format development and multichannel growth will help supermarket operators continue to drive non-food sales over 2009 and 2010 – albeit at a slower pace than in the last couple of years.
- 2.19 In terms of the trading performance of leading supermarket operators, Morrisons saw a significant improvement during 2008, as too did Asda. In contrast although Verdict identifies that Tesco increased its market share by 0.5 percentage points, over the past couple of years it has seen a strong resurgence among its competitors and its non-food growth has been impeded by the economic downturn.
- 2.20 Similarly, M&S Food is identified by Verdict to be under pressure. The retailer's upmarket food positioning has exposed it greatly to weakening consumer sentiment. M&S has seen its like-for-like food sales fall into reverse over the past year and in January 2009 the retailer announced that 25 underperforming Simply Food outlets were to close.

Out of Centre

- 2.21 Colliers CRE note that demand for out-of-centre representation is relatively static, with some retailers including TK Maxx, Asda Living and Tesco Home Plus actively seeking to expand their out-of-centre floorspace and others, including Focus, B&Q and Currys either disposing of stores or downsizing their operations.



2.22 In terms of proposals in the development pipeline, the majority of consents for out-of-centre retail floorspace are for bulky goods stores. However, there has been a decline in out-of-centre proposals in the development pipeline during 2007/8. Despite this, Colliers CRE predict that the development of out-of-centre floorspace development will increase compared to 2007, albeit by a modest amount.

Shopping Centre Development

2.23 Research undertaken by Colliers CRE recognises that within town centres, supply outstrips demand. This is particularly prevalent in terms of lettings within shopping centres. As a result, Colliers CRE expect future shopping centre schemes to be pre-let by only 70% to 80%. This compares to a number of similar schemes being 100% pre-let in previous years. This is symptomatic of a reluctance of retailers to commit to schemes. This presents challenges for schemes due to open in the next few years, and it is anticipated that the timeframe for developing many shopping centre schemes will be pushed back.

2.24 The research also identifies that retailers are reluctant to commit to schemes before they are constructed due to difficult trading positions and a large amount of supply. Retailers are able to 'cherry-pick' the best schemes to which they commit, and the largest anchor stores in particular, including Debenhams, House of Fraser and Marks and Spencer, are able to negotiate very favourable letting terms.

2.25 Town centre shopping centre schemes that will be successful in the future are considered to be those which benefit from good design and good location. Car parking facilities are also a distinct advantage. It is this type of development that will be able to compete with out-of-centre shopping facilities, which whilst more convenient for many consumers are considered not to offer an attractive shopping experience.

2.26 Although a number of major town centre schemes are still in the pipeline, the lack of funding available to developers due to the global 'credit crunch' has resulted in a number of schemes being delay or even shelved.



Growth in E-tailing ('E-commerce')

- 2.27 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. This trend is set to continue, although the exact impact that e-commerce will have on the high street has yet to be fully established. However, the rise in the UK in recent years of e-commerce has impacted upon retailers, developers and investors alike. As access to the internet/online shopping continues to grow through digital televisions and mobile phones, proportionally less money is anticipated to be spent in the high street or at retail parks.
- 2.28 The growth in use of the internet as a sales medium has been enabled by increasing access to the internet by households. The proportion of households with access to the internet is expected to increase further over the coming years. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment, and heavy demand for expensive electrical products available online.
- 2.29 A recent report by the BBC identified that more than a third (36.3%) of UK consumers now purchases goods over the internet. Moreover, the average spend per customer is increasing. The online electrical goods sector represents the largest amount of expenditure, followed by online food shopping.
- 2.30 More recent research conducted by the Interactive Media in Retail Group and analysts Capgemini indicates that internet shopping accounted for 15p of every £1 of retail spending during 2007. This equates to some £46.6 billion of expenditure. This is likely to have increased during 2008 and is set to increase into 2009. However, this compares to the British Retail Consortium's data identifying that online sales accounted for 6% of retail spending during 2007. Despite these differing results, internet spend has increased in recent years.
- 2.31 The forecast for online sales suggests that this sector could more than double over the next five years. Furthermore, online sales are expected to account for an increasing share of all retail goods sales, with a market share predicted to increase to 10% in 2011. Against this, forecasts by Experian (Retail Planner Briefing Note 6.1 – January 2009) indicate that whilst growth in this sector will be rapid, it will tail-off and stabilise not far beyond 12%.



- 2.32 With regard to supermarket operators, Verdict (2009) identify that with the exception of Morrisons (which does not trade online) the other major retailers have seen their online business grow over 2008 as online shopping penetration has continued to increase and as the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. This growth in online purchases in convenience goods identified by Verdict compares to MapInfo (Expenditure Explanatory Volume – 2008 Release) identifying no increase in the level of annual spend via Special Forms of Trading (e.g. online purchase) since 2005.
- 2.33 The success of internet shopping is having an impact upon traditional high streets, in light of increased competition and lower prices. Consequently, there is a possibility that online retailing will put some pressure on retail rental growth over the next five to ten years, but is unlikely to impact on capital values. Research by BCSC identifies that 'large' and 'very large' shopping centres (of over 40,000 sq m) are deemed almost immune from the impact of online shopping as they offer the complete 'day out'. Although as the size of the shopping centres decreases, it is more likely that there will be greater adverse effects. Within small shopping centres (sized between 5,000 – 20,000 sq m) it is likely that the growth of online shopping could reduce turnover notwithstanding any growth in disposable income.
- 2.34 Furthermore, there is some evidence to suggest that the increase in e-commerce is impacting not just on high street sales, but also on the inclination of retailers to expand their 'bricks and mortar' outlets (BCSC, 2006). Despite this, retailers are optimistic, as they envisage a continued demand for physical stores and, for most, store sizes are likely to remain the same. Significantly, more retailers ranked physical stores first, ahead of all other current channels of retail distribution, and this is a pattern that they envisaged continuing. Retailers see e-tailing as another channel of distribution (BCSC, 2006).
- 2.35 As a consequence of the likely increase in e-tailing, retailers will increasingly have to adapt their stores to create more experience led environments. However, the increase in 'virtual' floorspace could result in a decrease in the level of innovation and number of new concepts and formats in the high street and in shopping centres.
- 2.36 Despite all these different assumptions with regard to the future effect of online shopping, it is considered that e-tailing will not replace the shopping experience as shopping is a social activity.



Online shopping is very much seen as a complementary tool to support retail sales from physical destinations (BCSC, 2006). For successful retailers, online selling provides an additional route to the market. Online retailers benefit from demand generated through physical channels whilst high-street outlets can benefit from reaching a wider customer base through the internet.

- 2.37 In response to increased competition from the internet, high street retailers have improved their online services. The future for online retailing will mean that retailers without a website will lose out to competitors who have one. Crucially, retailers which combine a strong high-street offer with a well-represented and closely related e-tailing offer will have a positive outlook.



3.0 PLANNING POLICY FRAMEWORK

Introduction

3.01 Given that this study seeks to provide important evidence that will assist in the future development of the Local Development Framework (LDF) process, it is important to identify key policy advice and how the national and regional guidance may impact upon the development of policies locally. The key documents that have been considered as part of this study include:

- Planning Policy Statement 6: Planning for Town Centres (March 2005);
- The Proposed Changes to Planning Policy Statement 6: Planning for Town Centres Consultation Draft (July 2008);
- The Consultation Draft of Planning Policy Statement 4: Planning for Prosperous Economies (May 2009);
- The Yorkshire and Humber Plan – Regional Spatial Strategy (RSS) to 2026 (May 2008)

Planning Policy Statement 6: Planning for Town Centres (March 2005)

3.02 Planning Policy Statement 6: Planning for Town Centres (PPS6) was published in March 2005 and sets out the Government's national policies and principles with regard to retailing and town centres.

3.03 Paragraph 1.3 of PPS6 notes that:

'The Government's key objective for town centres is to promote their vitality and viability by:

- **planning for the growth and development of existing centres; and**
- **promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a good environment accessible to all.'**

3.04 There are other Government objectives which should be considered in the context of paragraph 1.3. These objectives include:

- **'enhancing customer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, particularly socially-excluded groups;**



- **supporting efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and**
- **improving accessibility, ensuring that existing or new development is, or will be, accessible and well-served by a choice of means of transport.'** (Paragraph 1.4)

3.05 In order to deliver the Government's objectives, paragraph 2.1 notes that development should be focused to existing centres in order to strengthen and, where appropriate, regenerate them.

3.06 A positive and proactive approach to planning is encouraged by the policy statement, which indicates that local planning authorities should work in conjunction with stakeholders and the community to, *inter alia*, assess the need for new floorspace for retail, leisure and other main town centre uses, taking into account both quantitative and qualitative considerations.

3.07 In assessing the need for additional retail and leisure development, paragraph 2.33 of PPS6 notes that:

'...local planning authorities should place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However local planning authorities should also take account of qualitative considerations. In deprived areas which lack access to a range of services and facilities, and there will be clear and demonstrable benefits in identifying sites for appropriate development to serve communities in these areas, additional weight should be given to meeting these qualitative considerations.'

3.08 In terms of quantitative need for additional retail development, paragraph 2.34 of PPS 6 notes that, when preparing its development plan documents, a local planning authority should assess the likely future demand having a realistic assessment of:

- **'existing and forecast population levels;**
- **forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for main leisure sectors; and**
- **forecast improvements in productivity in the use of floorspace.'**

3.09 In terms of qualitative need, paragraph 2.35 states that:



'...a key consideration for a local planning department will be to provide for consumer choice, by ensuring that:

- an appropriate distribution of locations is achieved, subject to the key objective of promoting the vitality and viability of town centres and the application of the sequential approach, to improve accessibility for the whole community; and**
- provision is made for a range of sites for shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, particularly the needs of those living in deprived areas.'**

- 3.10 The statement indicates at paragraph 2.36 that, in addition to the above, other considerations which may be taken into account include the degree to which shops may be overtrading.
- 3.11 Paragraph 2.41 of PPS6 states that local planning authorities should ensure when selecting sites for development that the scale of opportunities identified are related to the role and function of the centre and its catchment. Appropriate development should be located in the right type of centre to ensure that it fits and complements its role and function.
- 3.12 Accordingly, paragraph 2.42 states that local centres will generally be inappropriate locations for large scale new development. Therefore, local planning authorities should consider an indicative upper limit for the scale of development likely to be permissible in different types of centres.
- 3.13 PPS6 adopts the sequential approach to site selection whereby local planning authorities should select appropriate sites for allocation within identified centres where an identified need is to be met. All options in town centres should be thoroughly assessed before less central sites are considered for development of town centre uses. Paragraph 2.44 sets out the sequential approach required. Locations should be considered in the following order:
- first, locations in appropriate existing centres where suitable sites or buildings for conversion are, or are likely to become available within the development plan document period, taking account of an appropriate scale of the development in relation to the role and function of the centre; and then
 - edge-of-centre locations, with preference given to sites that are or will be well connected to the centre; and then



- out-of-centre sites, with preference given to sites that are or will be well served by a choice of means of transport and which are close to the centre and have a high likelihood of forming links with the centre.

- 3.14 When considering sites local planning authorities should, in consultation with stakeholders, identify an appropriate range of sites to accommodate identified need. Paragraph 2.45 recognises that local planning authorities should be flexible and realistic when discussing with developers and operators those sites drawing up such sites and should discuss this with developers and operators. Local planning authorities should have appreciation for business models and should take into account business models in terms of scale, format, car parking provision and the scope for disaggregation.
- 3.15 When considering potential sites for allocation either in edge-of-centre or out-of-centre locations, paragraph 2.48 of PPS6 indicates that local planning authorities should assess the impact that potential development could have on identified centres within the catchment. Where the potential development of a site or sites proposed to be allocated in a centre would substantially increase the attraction of the centre and could have an impact on other centres, the impact on other centres will also need to be assessed.
- 3.16 In addition, paragraph 2.49 indicates that, in selecting appropriate sites for allocation, local planning authorities should have regard to:
- Whether the site is or will be accessible or well served by a choice of means of transport, especially public transport, walking and cycling, as well as by car; and
 - The impact on car use, traffic and congestion.
- 3.17 PPS6 identifies that other matters of relevance when considering sites for allocation in future development plan documents include: the physical regeneration benefits of developing a site; additional employment opportunities; economic growth; and social inclusion.
- 3.18 Local planning authorities are also required to allocate sufficient sites for the future which can accommodate the identified need for at least the first five years from the adoption of development



plan documents. For large town centres schemes a longer period may be appropriate to allow for site assembly.

Proposed Changes to Planning Policy Statement 6: Planning for Town Centres – Consultation (July 2008)

- 3.19 The proposed changes to PPS6 document was published in July 2008 for consultation. One of the stated key aims of the changes is to protect local retailers who may struggle in the current economic climate, and in the face of competition from internet sales and the global market place.
- 3.20 The proposed revision would remove the current 'need test' for new retail development outside town centres, which the Government considers has unintentionally stifled diversity and consumer choice, and has led to some new retail schemes on edge of centre sites being refused, despite the fact such schemes could improve the vitality and viability of the centre.
- 3.21 Instead, a new 'impact test' is proposed which is aimed at providing councils with a better tool to prevent large scale developments which would put small shops and town centres at risk. The new, strengthened impact test would take account of local markets, consumer choice and retail diversity considerations and whether a town centre would be adversely affected by loss of trade/turnover will help protect struggling town centres whilst successful centres are subjected to normal competitive pressures, both of which will benefit consumers and business. New development will normally be refused where there are significant negative impacts on a town centre. However, if wider benefits outweigh negative impacts then the proposed development should be approved.
- 3.22 The current PPS6 tests, which ensure that the size of the development is not out of scale with a town centre and that development is accessible by a range of transport modes, are to be incorporated into the new impact test.
- 3.23 The 'sequential test' is retained, requiring the most central town centre sites to be developed first, but the policy also encourages investment in disadvantaged areas where new employment opportunities can be created through development.
- 3.24 As a general rule, new development proposals should satisfy both the new 'impact test' and the 'sequential test'.



- 3.25 Draft PPS6 carries forward the thrust of current policy by requiring local authorities to take a proactive approach to planning for their town centres and to provide sustainable economic growth through policies which are responsive to economic change. Notably, the document states that **'local planning policies should still be based on quantitative and qualitative assessments of need for new floorspace'**, but the current emphasis on quantitative need is proposed to be removed.
- 3.26 In summary, it is proposed that the following policy amendments are pursued:
- Replacing the current five tests for development outside town centres with two – impact and the sequential test;
 - A greater focus on the wider social, economic and environmental benefits of proposals which could outweigh adverse town centre impacts;
 - Taking a longer term view of any impacts, typically beyond five years;
 - Assessing the effects of a proposal on consumer choice and retail diversity;
 - Introducing land values and the length of time key sites have remained undeveloped as indicators of a centre's vitality and viability; and
 - Further clarification of the requirements for impact assessments to accompany proposals of less than 2,500 sq m gross.
- 3.27 It was originally anticipated that a final revised PPS6 would be published in early 2009, though this has subsequently been revised due to the publication of Draft PPS4: Planning for Prosperous Economies in May 2009. This new PPS seeks to combine all the various strands of planning policy relating to the economy into one document, including those areas previously considered by PPS6.

Draft Planning Policy Statement 4: Planning for Prosperous Economies (May 2009)

- 3.28 The principal purpose of the draft PPS is to encourage regional bodies and local authorities to plan positively for economic development. The draft policies are more concise than those contained in previous statements and are divided into 'plan-making' and 'decision-taking'. For the purpose of draft PPS4, economic development includes:
- B1, B2 and B8 use classes;
 - Town centre uses: and



- Other development which provides employment opportunities, generates wealth or contributes towards economic output.

3.29 With regard to town centre development, local authorities should proactively plan for consumer choice and promote competition. There should be a strong retail mix where the range and quality of retailers meets local needs. The importance of smaller shops and markets to the overall vitality and viability of centres should also be recognised.

3.30 PPS4 also proposes to remove the 'need' test for town centre uses, although an assessment of need will still form part of the plan-making process. The sequential approach requiring a thorough assessment of potential sites in central areas remains (strengthened by Policy EC21 which states that the sequential test is now intended as a 'gateway test'), and a new 'impact' test requires an assessment of a range of potential impacts of development, both positive and negative. Local authorities should also give additional weight to the qualitative need for new retail and leisure development in deprived areas.

3.31 The 'impact' test of retail development includes an assessment of the effect of the spatial planning strategy, appropriateness of scale, accessibility by a choice of means of transport, trade diversion from in-centre facilities, the impact on the vitality and viability of centres and future investment in them. Wider positive impacts to be taken into account relate to the creation of employment, physical and economic regeneration, social inclusion and the potential to bring forward allocated sites outside town centres.

3.32 Draft PPS4 (Policy EC8) all highlights that local authorities should set thresholds above which impact assessments will be required, which will be dependent upon different the current role of different centres.

3.33 In a shift from previous statements, there is a reference to the potential for new or expanded out-of-centre regional or sub-regional shopping centres where a need is identified through regional planning.

3.34 It is intended that PPS4 will be adopted early 2010.



Regional Spatial Strategy for the Yorkshire and Humber (May 2008)

- 3.35 The Regional Spatial Strategy for Yorkshire and the Humber (RSS) has been finalised and sets out the spatial planning for the region. The RSS aims to guide development over the next 15 to 20 years. It influences the future direction of the economy, housing, transport, the built and natural environment. It provides a long term strategy for the region to help it become more competitive and to promote more sustainable patterns/forms of development and investment activity.
- 3.36 The RSS recognises that the main city, town and village centres throughout the region are critical in providing business services and performing a role as a focus for social, cultural and political life. Calderdale sits within the Leeds City Region sub-area. The RSS identifies Halifax as a Sub-Regional Town within the regional settlement network, with Brighouse identified as a Principal Town.
- 3.37 Regional and sub-regional cities/towns are to be the primary focus for housing, employment, shopping, leisure, education, health and cultural activities in the region. These areas will be transformed into attractive places where people want to live, work, invest and spend time in. Principal Towns should be the focus of housing, employment, shopping, leisure, education and health and cultural activities.
- 3.38 **Policy YH7** deals with the location of new development. In considering the location of new development, the policy states that the first priority should be for the re-uses of previously developed land and buildings within developed areas within cities and towns. The second priority should seek to target development towards other suitable infill opportunities within city and towns, with the third priority relating to extensions to city and towns.
- 3.39 **Policy LCR1** deals with the Leeds City Region. It aims to develop an enhanced and complementary role for Halifax and to capitalise on its strengths and potential. The RSS also suggest that principal towns, such as Brighouse, should seek to strengthen their service role. The RSS also seeks to support indigenous growth in Halifax and Brighouse. The aims of the policy are to focus most development in Halifax.
- 3.40 Chapter 11 of the RSS deals with creating a successful and competitive regional economy. The RSS recognises that sub regional cities/towns are key drivers of productivity and can secure a



competitive advantage. **Policy E1** (i) recognises retail and leisure development as key economic and employment generators.

- 3.41 **Policy E2** deals with town centres. The policy seeks to strengthen the role and performance of existing city and town centres through strategies and investment decisions. Table 11.2 outlines that Calderdale should be looking to create 110 (Full Time Equivalents) jobs per annum in town centres for retail and leisure uses. Halifax as a sub-regional centre should be the focus for office, retail, leisure, entertainment, arts, culture, and tourism. **Policy E2B** seeks that other measures including environmental enhancement, accessibility improvement and town centre management and promotion can also improve the vibrancy of existing centres. **Policy E2C** restricts new, or large scale expansion of existing, out-of-centre regional or sub-regional shopping centres.
- 3.41 **Policy E3** of the RSS deals with land and premises for economic development. The RSS seeks to ensure that previously developed land should be available to provide sufficient land and premises in sustainable locations to meet the modern economies requirements. The need for additional office, retail and leisure floorspace is to be focused in existing city and town centres.
- 3.42 **Policy E6** deals with promoting tourism in City and Sub-Regional Town Centres such as Halifax. The RSS seeks to realise the potential of heritage, leisure and cultural assets by promoting their roles as modern and varied destinations.
- 3.43 **Policy E7** of the RSS deals with the rural economy. The RSS seeks to promote complementary roles for principal towns and local service centres, such as Brighouse and Elland, Sowerby Bridge, Hebden Bridge and Todmorden.



4.0 ORIGINAL MARKET RESEARCH

Introduction

- 4.01 Although WYG acknowledges that there are limitations to survey research, particularly in relation to the samples that can be achieved, the results provide important broad indicators as to consumer preferences in relation to where people live and shop. Indeed, original market research enables analysis of a particular area, which helps to evaluate the actual draw of major centres and how they impact upon the market share of smaller centres. This is particularly pertinent to existing centres within Calderdale given the proximity and strength of the competing centres such as Bradford, Huddersfield, Leeds and major (regional) out of centre retail destinations such as White Rose Shopping Centre and Birstall Retail Park. The use of specifically commissioned survey research is fundamental in informing a study that will effectively identify the likely capacity for future floorspace within the District.
- 4.02 A key element of this Study was to obtain a detailed understanding of shopping patterns within the District and the potential catchment of existing centres within it. WYG commissioned specialist market researchers (NEMS Market Research Limited) to undertake empirical research, which comprised the following:
- Household Telephone Survey;
 - On-street survey; and
 - Business Survey⁶.

Household Telephone Survey

- 4.03 In May 2008 a survey of 1,211 households in total was undertaken within a defined Study Area, which comprised the District of Calderdale, extending into the neighbouring authorities of Bradford, Kirklees and Rochdale - including the centres of Brighouse, Elland, Halifax, Hebden Bridge, Sowerby Bridge and Todmorden. More specifically, 1,051 household surveys were carried out in Calderdale. These were merged with 160 household surveys undertaken for the Bradford Retail Study, as they overlapped into the Calderdale catchment area. The plan overleaf (Figure 4.1) indicates the extent of the defined Study Area.

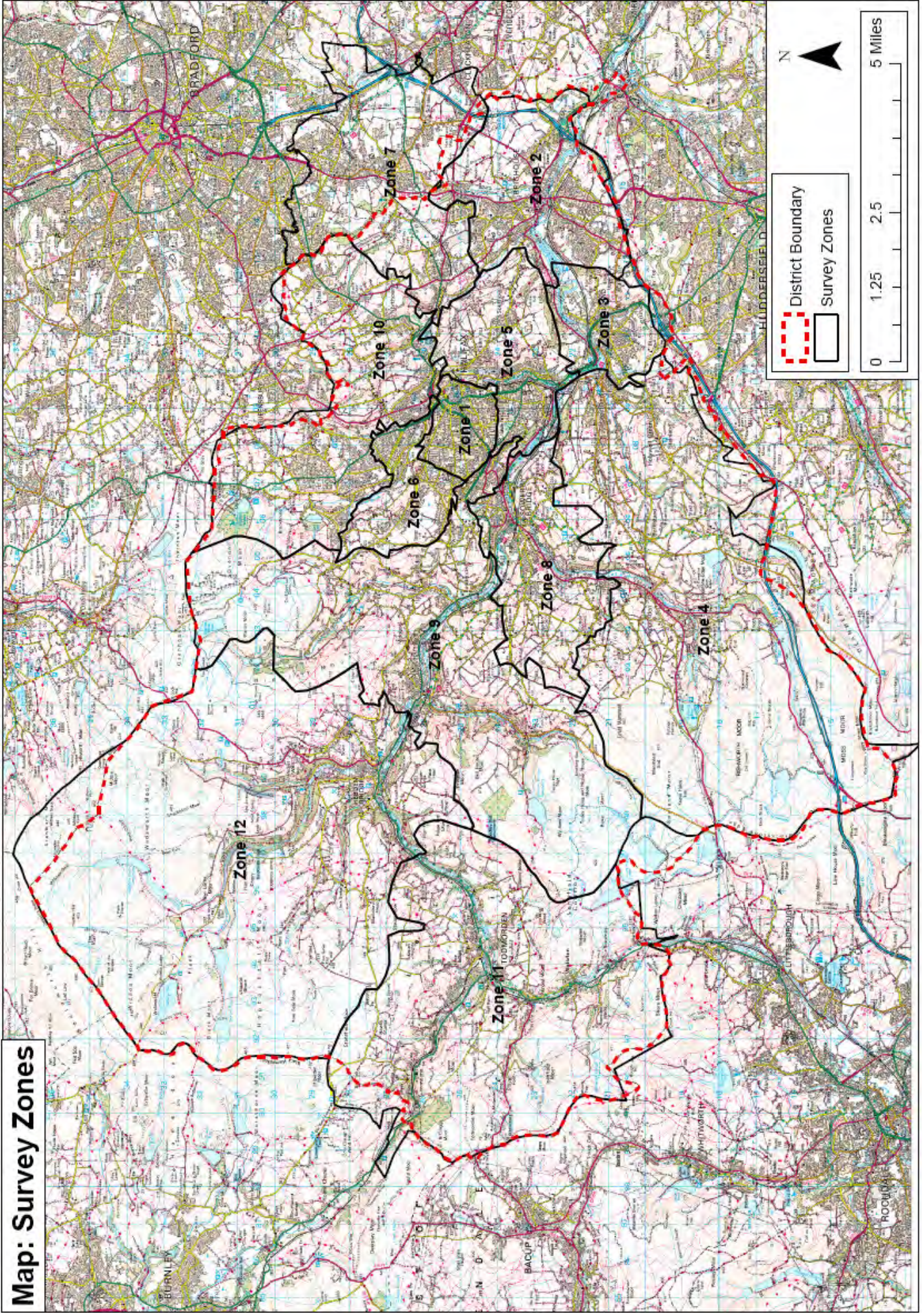
⁶ Business survey undertaken by WYG



4.04 The survey area was broken down into 12 zones and was based on postcode sectors at a five digit level (e.g. BD12 0):

Zone 1	(HX1 1, HX1 2, HX1 3, HX1 4 and HX1 5)
Zone 2	(HD6 1, HD6 2, HD6 3 and HD6 4)
Zone 3	(HX5 0 and HX5 9)
Zone 4	(HX4 0, HX4 8, HX4 9 and HX6 4)
Zone 5	(HX3 0 and HX3 9)
Zone 6	(HX2 0 and HX3 5)
Zone 7	(BD12 0, BD12 7, BD12 8, BD12 9, BD19 6, BD6 2 and HX3 8)
Zone 8	(HX6 1, HX6 2 and HX6 3)
Zone 9	(HX2 6, HX2 7 and HX7 5)
Zone 10	(HX2 8, HX2 9, HX3 6 and HX3 7)
Zone 11	(OL14 5, OL14 6, OL14 7 and OL14 8)
Zone 12	(HX7 6, HX7 7 and HX7 8)

Map: Survey Zones





4.05 In **Appendix 1**, we have provided maps of each of the survey zones to show their extent and how they relate to each town, district and local centre. A copy of the questionnaire and full tabulations of the Calderdale Household Survey is contained at **Appendix 2**.

On-Street Survey

4.06 In addition, an on-street survey was undertaken within the six town centres in order to identify customer views of current shoppers to these centres, including their perception of each town centre and how they could be improved. In this respect, a total of 705 surveys were undertaken within the town centres of Brighouse (100 surveys), Elland (102 surveys), Halifax (202 surveys), Hebden Bridge (102 surveys), Sowerby Bridge (99 surveys) and Todmorden (100 surveys). The on-street surveys were conducted between Thursday 8 May and Saturday 17 May 2008. The tabulated results of the on-street survey are contained at **Appendix 3**.

Business Survey

4.07 To complement the survey work commissioned for NEMS Market Research, WYG also undertook a Business Survey in May 2008 of all businesses within the six town centres. This survey explored the current strengths and weaknesses from a business operator's perspective as recommended by PPS6.

4.08 Business Surveys were distributed to all of the commercial businesses within the six town centres within the District. A copy of the questionnaire and summary of results are contained at **Appendix 4**. A total of 1,807 surveys were distributed as follows:

Town Centres

Brighouse	214 distributed, 60 returned, 28% response rate
Elland	127 distributed, 54 returned, 43% response rate
Halifax	884 distributed, 148 returned, 17% response rate
Hebden Bridge	225 distributed, 67 returned, 30% response rate
Sowerby Bridge	160 distributed, 11 returned, 7% response rate
Todmorden	197 distributed, 34 returned, 17% response rate



5 ASSESSMENT OF VITALITY AND VIABILITY OF EXISTING CENTRES

Assessing the Vitality and Viability of Existing Centres

5.01 Planning Policy Statement 6 'Planning for Town Centres' (2005) emphasises the importance of maintaining a 'healthy' town centre as it helps foster civic pride and local identity and can contribute towards the aim of sustainable development. It also states that by monitoring town centres on a regular basis, signs of decline can be identified early. **Appendix 5** provides detailed analysis of the vitality and viability of the following centres in accordance with guidance contained in PPS6:

- Brighouse Town Centre;
- Elland Town Centre;
- Halifax Town Centre;
- Hebden Bridge Town Centre;
- Sowerby Bridge Town Centre; and
- Todmorden Town Centre.

5.02 WYG has also visited and examined the network of six local centres within the district to appreciate their distribution, role and function. These are set out in **Appendix 6**. The following local centres were examined:

- King Cross;
- Mytholmroyd;
- Northowram;
- Ripponden;
- Hipperholme; and
- West Vale

5.03 Indicators of vitality and viability, set out in Paragraph 4.4 of PPS6, are used as a basis for the assessment of the 'health' of existing centres. These indicators are as follows:



- **Diversity of main town centre uses (by number, type and amount of floorspace):** An Experian land use plan⁷ (Goad plan – 2000, 2001, 2006 and 2007) is used to assess the diversity of uses in the town centres;
- **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations:** WYG includes all retail floorspace in the Calderdale administrative area (where available) in the assessment;
- **The potential capacity for growth or change of centres in the network:** WYG has considered the opportunity for the main centres within the District to expand, including considering the scope for more intensive development on previously developed land;
- **Commercial Operator representation and intentions to change representation:** Derived from the land-use surveys, town centre business surveys (**Appendix 4**) and FOCUS reports (2007) from outstanding retailer demand;
- **Shopping rents:** the average Zone A rents paid in centres, derived from published data (where available) or discussions with local agents;
- **Proportion of vacant street level property:** derived from the land-use surveys;
- **Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental):** derived from published data, where available;
- **Pedestrian flows:** from on-site observations;
- **Accessibility:** from WYG’s assessment and shopper and business surveys;
- **Customers’ and residents’ views and behaviour:** derived from the various surveys;

⁷ Experian Goad information is only available for Brighouse, Elland, Halifax, Hebden Bridge, and Todmorden. OS based land use plans (derived from ProMap) are used for the other centres



- **Perception of safety and occurrence of crime:** from various surveys and 'on-the-ground' observations; and
- **State of the city/town centre environmental quality:** from 'on-the-ground' observations and survey results.

Town Centres

5.05 Based on our analysis, set out below is a SWOT analysis and summary of the five town centres within the District.

Halifax

5.06 Halifax shopping centre is of sub-regional significance. It is ranked 204th nationally by Management Horizons Europe (2008), although it has experienced a decline of 30 in the national rankings since 2004. The defined Central Shopping Area contains 473 retail outlets occupying 111,890 sq m of retail floorspace. The comparison goods sector is the most prolific in terms of floorspace, accounting for 34.7% of the total retail floorspace in the centre, although Halifax contains a wide variety of other commercial retail and leisure uses. It also performs a range of civic and cultural services, containing Council Offices, Law Courts, a public library, the Victoria Theatre, the Calderdale Industrial Museum and a Tourist Information Centre. It is significant to note that the total amount of retail floorspace in the centre has increased by approximately 15,100 sq m over the 2000 to 2009 period. A proportion of this can be attributed to the opening of the Matalan store on Berry Lane in 2002.

5.07 Due to the historic nature of the town centre Halifax is dominated by small retail outlets. The Goad Town Centre survey (2009) also indicates that Halifax contains an above average representation of vacant outlets, of mixed quality. Since 2000, many of the vacant units have been recycled, which is a positive sign for the centre. However, there are still a high proportion of small vacant outlets which may be unsuitable to the demands of modern retailing. Vacancies in the town centre have increased since 2000, by twenty one units. Although Prime Zone A rents in the town centre are fairly high (£1,023 per sq m at June 2007) and have increased in the past few years, other competing centres in the sub-region have seen a similar increase in Prime Zone A rents. Yields in Halifax have increased since April 1995, indicating a decline in investor confidence in Halifax. The



business survey revealed that retailers felt the centre would be improved if an increased choice/range of shops were provided as well as increased car parking provision.

5.08 Halifax contains some 45% of the top-twenty national high street retailers (as identified by FOCUS – 2008) and a range of other multiple retail, leisure and financial and business service operators. Accessibility to the town centre is good and available by a range of means of transport, with the largest proportion of visitors interviewed in the on-street survey having arrived in the centre by bus, minibus or coach. Furthermore the majority of those that arrived by car did not encounter any difficulty in obtaining a car parking space. Halifax was recognised as having good environmental quality in the main, providing an attractive shopping environment for customers.

Table 5.1: SWOT Analysis of Halifax

Strengths	Weaknesses
<ul style="list-style-type: none"> • Compact town centre; • Good leisure services sector; • Strong market share for comparison goods; • Close proximity of retail warehousing around town centre (well linked); • Strong recycling of vacant units, demonstrating demand for space; • Good level of signage detailing location of car parks; • Good mix of independent traders and national multiples; • Historic town centre with distinctive architecture and built environment; • Good transport links by public transport and road; • Well maintained pedestrian environment; • Large Borough Market; • EUREKA museum for children; • Sub-regional centre with strong civic function; and • Culturally diverse centre with many specialist retailers. 	<ul style="list-style-type: none"> • Only nine of top twenty retailers present; • Lack of office provision; • Lack of key anchor retailers; • High level of vacancies, many of which are of poor quality and are in a secondary location; • Lack of suitable retail premises for perspective traders; • Limited convenience provision in primary shopping area; • Decrease in retail ranking; • Yields have increased since 1995 showing a decline in investor confidence; • Rental growth comparative to competitor centres but lower growth experienced; • Lack of high quality large retail units; and • Dominance of small retail outlets.
Opportunities	Threats
<ul style="list-style-type: none"> • Limited opportunities without comprehensive redevelopment; • Development of niche and specialist businesses; • Secure key department and/or fashions stores; • New office development; • Enhanced Town Centre Management Framework; and • Need to improve leisure provision including a cinema. 	<ul style="list-style-type: none"> • Development of Broadway in Bradford City Centre and Kings Gate Extension and Queensgate in Huddersfield; • Lack of appropriate retail outlets for prospective retailers; • Continued growth of competing centres and out-of-centre retail destinations; and • Increased proliferation of discount retailers.

5.09 In summary, whilst Halifax is generally a busy, thriving centre, it needs to improve its convenience and comparison sectors to improve its retail offer. It is important for Halifax to gain a key anchor



store, which will attract other quality traders as well as more customers to the town centre. Furthermore, whilst the town centre is performing well in the leisure services sector against the national average, a large leisure facility such as a cinema would be a big improvement. This is backed up by the results of the in-street survey, where over half of respondents felt that Halifax needed a cinema. Increased office provision is also needed in the centre, as there is a lack of office space currently. However, these opportunities can only be achieved with comprehensive redevelopment of the town centre, as there are limited suitable locations at present.

Brighouse

- 5.10 Brighouse is the second largest town centre in the District, after Halifax, containing 35,440 sq m of retail floorspace. It is situated 8 km to the south east of Halifax and 8km to the north of Huddersfield. The Goad Town Centre (2009) surveys reveal that representation of convenience floorspace is above the national average, whilst comparison, leisure services and financial and business service floorspace are all below the national average. In the convenience sector, the town is anchored by a Tesco foodstore on Huddersfield Road and a Sainsbury's foodstore on Mill Lane. The town centre contains a mix of national multiples and independent traders.
- 5.11 In terms of outlet sizes in Brighouse, the town centre is dominated by small outlets (under 93 sq m) which account for some 59.6% of total floorspace, compared to a national average of 39.1%. Vacancies are located throughout the town centre, though Bradford Road (eight units), Bethel and Park Street (six units each) have the highest number of vacant units within the Brighouse. Between 2001 and 2009 the number of vacant outlets has increased from 21 to 34 units, with the amount of vacant floorspace also increased by 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.
- 5.12 With respect to national multiples the centre accommodates three of the top-twenty national high street retailers, as defined by FOCUS, in addition to a good range of high street banks and building societies. Brighouse's retail ranking has decreased steadily over the past 10 years. This is in contrast to the nearby centres of Halifax and Huddersfield whose rankings have both remained steady over the same period. The centre is easily accessible by private car or public transport. It



contains a bus station on Ganny Road and a railway station on Railway Street. Most businesses (62%) who responded to the business survey stated that at the current time they were trading either 'well' or 'very well' which illustrates a healthy local retail sector.

Table 5.2: SWOT Analysis of Brighouse

Strengths	Weaknesses
<ul style="list-style-type: none"> • Second largest retail destination in Calderdale; • Compact centre; • Good links with Tesco and Sainsbury's; • Strong convenience sector; • Strong independent sector/established independent retailers; • Good on-street parking; • Market; • Easily accessible by a range of transport modes; and • Businesses noted current trading performance was good. 	<ul style="list-style-type: none"> • Low proportion of comparison floorspace compared to national average; • Under-represented retail service, leisure service and financial and business service floorspace; • High proportion of vacant floorspace; • Lack of new modern larger units; • Lack of high quality retailers; • Only has three of the top 20 retailers; • Wellington Arcade is run-down; • Bus station requires better links to the town centre; and • Limited young retail enterprise.
Opportunities	Threats
<ul style="list-style-type: none"> • Enhance town centre management team; • Wellington Arcade needs regenerating and could be a key shopping area, with its close proximity to Commercial Street; and • An anchor store selling comparison goods would attract better quality retailers and more customers. 	<ul style="list-style-type: none"> • Limited redevelopment opportunity; • Competition from Junction 27/Birstall Retail Park • Continued expansion and increased range of goods sold at large format supermarkets; and • Lack of available retail stock may force perspective retail investors to locate elsewhere.

5.13 Brighouse is a fairly healthy town centre. The proportion of convenience floorspace in Brighouse is well above the national average; however, the proportion of the other retail uses is below the national average. There is a good mix of high street retailers and independent retailers in the town. However, Brighouse needs to improve its retail offer, to compete with the larger centres in the Calderdale area. Environmental quality in the town centre is good and is easily accessible. There is an above average proportion of vacant outlets and floorspace in the centre, with two of the units vacant for at least the last eight years. There are opportunities in the centre to develop parts of King Street and Wellington Arcade.

Sowerby Bridge

5.14 Sowerby Bridge contains 19,006 sq m of retail floorspace. Convenience retail floorspace is above the national average, and this sector is anchored by a Lidl store on Tuel Lane. However, there is also a Tesco store located close to the town centre, on Sowerby Street. Comparison retail floorspace is below the national average although WYG consider the town centre to be adequately served in this regard. Indeed the centre contains a variety of specialist comparison traders and is



dominated by independent traders. Retail service and leisure services floorspace are both above the national average. Although the majority of retail outlets in Sowerby Bridge (69%) are small (under 93 sq m), this is appropriate to the type of trader that it contains, as independents generally prefer small retail outlets (Goad, 2009).

5.15 Sowerby Bridge contains a centrally located train station with regular connections to Leeds and Manchester among others. Also, buses provide services to nearby centres. Sowerby Bridge is located on the A5 road. The majority of traders (73%) who responded to the business survey stated that their business had either grown significantly or moderately, indicating a strong retail sector in the town centre. The centre provides a safe environment for pedestrians. Over a third of shoppers felt that accessibility by public transport to Sowerby Bridge was either 'better' or 'much better' than accessibility to other shopping centres. Environmental quality in the town centre is good, with well maintained retail units and an array of street furniture.

Table 5.3: SWOT Analysis of Sowerby Bridge

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong walk-in trade; • Convenience, retail service, leisure services and financial and business service floorspace all above the national average; • A high proportion of strong, specialist independent traders which provides a unique retail offer; • Car parking appears reasonable and well priced; • Varied environmental quality; and • Easily accessible by a range of means of transport. • Tourism and canal are key attractions. 	<ul style="list-style-type: none"> • The market is not well occupied; • High proportion of small retail outlets serves to restrict the types of retailer that can locate in the centre; • Poor comparison function and provision; • High vacancy levels throughout the centre; • The proportion of comparison floorspace is below the national average; • The proportion of vacant floorspace is above the national average; • Tesco is divorced from the town centre; and • The primary shopping area is located on a busy through road (Town Hall Street) which impacts on shopper safety and behaviour.
Opportunities	Threats
<ul style="list-style-type: none"> • Focus on canalside opportunities; • Growth in tourism to the centre through increased promotion of the centre (through the canal boat industry); • Continued growth of the independent/specialist retail sector in Sowerby Bridge could underpin the town's unique retail offer; • Refurbishment and upgrading of quality and configuration of current stock including frontages; and • Increased fuel prices may encourage more indigenous tourism in the UK; Sowerby Bridge should tap into this market 	<ul style="list-style-type: none"> • Increased pressure from competing centres and out-of-centre retail destinations including Tesco; • Small units not appropriate to modern retailer requirements; • Town centre expansion is difficult due to the constrained nature of the centre by the river and canal; • Lack of town centre management team or local traders group; • Increased competition from supermarkets selling a wider range of non-food goods; and • A national economic downturn may hit specialist traders the hardest.



5.16 Sowerby Bridge is a healthy, vital and viable centre at present. The high proportion of good quality independent retailers adds to the diversity and the unique range of goods and services on offer in the town. Environmental quality in the town centre is excellent and is easily accessible. In terms of the future of the centre, it will be necessary to balance the delivery of new retail floorspace to ensure that it retains/improves its market share and its retail offer while preserving the good quality environment and independent/specialist nature of the business that it contains.

Hebden Bridge

5.17 Hebden Bridge is ranked 4,226th nationally in the Management Horizons Europe (2008) ranking of retail centres. The Goad Town Centre survey (2008) identifies the centre to have 17,350 sq m of retail floorspace. Retailing in the centre is dominated by a Co-op store on Market Street which offers convenience goods in the main. An outdoor market is held on Valley Road two times a week, containing further convenience and comparison goods provision. The proportion of leisure services floorspace is above the national average. However, the proportion of convenience, comparison, retail service and financial and business services floorspace is below the national average.

5.18 As with many of the other town centres in Calderdale, Hebden Bridge is dominated by small outlets of less than 93 sq m. Vacancies in the town centre are below the national average with respect to both the proportion of floorspace and the proportion of outlets that they occupy. Hebden Bridge is connected by buses which provide services to nearby towns such as Halifax, Todmorden and Sowerby Bridge. A train station is located within close proximity of the town centre and provides direct services to Halifax, Leeds and Manchester. The town centre contains a number of car parks located throughout the centre, the largest of which are Garden Street (55 spaces) and Bridge Gate (32 spaces).

Table 5.4: SWOT Analysis of Hebden Bridge

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong leisure services destination; • Low level of vacant floorspace compared to the national average; • There is an outdoor market on Valley Road; • Very attractive environmental quality; • Good level of car parking provision which is reasonably priced; • High level of independent traders; • Strong walk-in trade; and • Accessibility by public transport is good. 	<ul style="list-style-type: none"> • Convenience, comparison, retail service and financial and business services floorspace are all below the national average; • Conservation and river provide physical constraints to the town; • High level of small retail units, which are inadequate for modern retailer requirements; and • Lack of high street multiples.



Opportunities	Threats
<ul style="list-style-type: none"> • Further enhance the banks along the River Calder, to attract visitors to this appealing location; • Improve the quality of the outdoor market to attract more visitors; • Enhance Town Centre Management Team; • Development of niche and specialist businesses; and • Improvement of the retail stock/frontages in the town centre to provide better quality outlets; • Increased fuel prices may encourage more indigenous tourism in the UK; Hebden Bridge should tap into this market. 	<ul style="list-style-type: none"> • Increased competition from nearby centres; and • Increased pressure from competing centres and out-of-centre retail destinations • Lack of suitable vacant outlets will restrict retailers that will come into the centre; • A national economic downturn may hit specialist traders the hardest.

5.19 Hebden Bridge is predominantly a destination for convenience shopping, with the Co-op dominating the retail market. However, the proportion of leisure services floorspace was also strong in the centre. Diversification of the town centre’s retail offer would make it a more attractive retail destination. This could be achieved by improving the quality of the outdoor market to provide a quality retail offer.

Todmorden

5.20 Located 20 km to the west of Halifax, Todmorden is the second smallest centre with some 16,170 sq m of retail floorspace (Goad, 2009). It has a limited shopping function and occupies a role predominantly in providing for the day to day needs of the local population. This is indicated in the diversity of uses present in the centre, with the proportion of comparison, leisure and financial and business services floorspace below the national average whilst the proportion of convenience and retail service floorspace are above the national average. It is significant to note that Management Horizons Europe (2008), ranks the centre 1,950th nationally, which represents a decline of 602 places since 2004.

5.21 Todmorden is dominated by small retail outlets of less than 93 sq m. Such outlets represent 69% of all outlets compared to a national average of 39%. The Lidl store on Halifax Road is the only large-format retail accommodation in Todmorden. The centre has a large representation of vacancies with both the proportion of vacant floorspace and vacant outlets being above the national average. The number of vacancies has increased markedly since 2000, from 22 to 32 units in 2009.



5.22 The centre benefits from good accessibility on foot with pedestrian movement around the centre unproblematic. There is a railway station on Rise Road, which provides services to Blackpool, Leeds, Manchester, Wakefield and York amongst others. There is also a bus station on Burnley Road, which provides services to local centres. The centre contains ten car parks, which is ample for a centre of this size.

Table 5.5: SWOT Analysis of Todmorden

Strengths	Weaknesses
<ul style="list-style-type: none"> • Good representation of convenience, retail service and financial and business services floorspace when compared to the national average; • Indoor and outdoor market on Burnley Road; and • Easily accessible by a range of different modes of transport. 	<ul style="list-style-type: none"> • Declined significantly in the MHE rankings between 2004 and 2008; • Comparison and leisure services floorspace poorly provided compared to the national average; and • Vacancies are above the national average in terms of both proportion of outlets and floorspace.
Opportunities	Threats
<ul style="list-style-type: none"> • Large vacant unit on Burnley Road which could attract attention from retailers; • Collection of small retail units on Rochdale Road could be redeveloped to accommodate one large retail unit; • Improve the quality of the outdoor market to attract more visitors; and • Enhance Town Centre Management Team. 	<ul style="list-style-type: none"> • Lidl may dominate the retail market leading to closures of independent stores; • Increased competition from nearby centres; and • The economic downturn may have a negative impact on smaller centres with many independent retailers.

5.23 In conclusion Todmorden was seen to be a healthy centre performing a role as a convenience and service centre. The major issue that the centre faces is the high level of small vacant units in the centre. To reduce the amount of vacant units and floorspace, certain units may have to be redeveloped or consolidated to suit the needs of the modern retailer.

Elland

5.24 Located 6 km to the south of Halifax, Elland is the smallest town centre which contains some 14,900 sq m of retail floorspace (Goad, 2009). It has a limited shopping function and occupies a role predominantly in convenience shopping and service sector facilities. This is indicated in the diversity of uses present in the centre, with the proportion of convenience, retail service, leisure services and financial and business services floorspace being above the national average. However, the proportion of comparison floorspace is greatly below the national average. Elland is ranked 3,321st nationally in the Management Horizons Europe (2008) ranking of retail centres.



5.25 Elland is dominated by small retail outlets of less than 93 sq m. Such outlets represent 64% of all outlets compared to a national average of 39%. Indeed the only large-format retail accommodation in Elland is a Co-op on Huddersfield Road and a Somerfield on South Lane. The centre has a large number of vacant outlets with the proportion of outlets being above the national average, with the proportion of vacant floorspace also above the national average. Many vacant outlets are situated on Southgate (nine units) and Town Hall Buildings (eight units). The centre benefits from good accessibility on foot while pedestrian movement around the centre is unproblematic. Buses provide services to Brighouse, Dewsbury, Halifax and Leeds amongst others. The centre contains a large amount of off-street parking, and at the time of the survey, there were many car parking spaces available.

Table 5.6: SWOT Analysis of Elland

Strengths	Weaknesses
<ul style="list-style-type: none"> • Strong convenience and service destination; • Low level of vacant floorspace; • Outdoor market on Town Hall Square; • Accessible by public transport; • Car parking is plentiful, some of which is free; • Attractive environmental quality; and • Well maintained public toilets. 	<ul style="list-style-type: none"> • The proportion of comparison floorspace is significantly below the national average; • Mainly independent retailers; • Very high level of small retail units; • A limited range of modes of public transport; • Somerfield feels detached from the centre at present; • Low level of footfall at time of survey; • Narrow pavements; and • Narrow roads unsuitable for retailers using large delivery goods vehicles.
Opportunities	Threats
<ul style="list-style-type: none"> • Collection of vacant units at the corner of Southgate in a prominent location could be redeveloped into one large unit; • The outdoor market on Town Hall Square needs more quality retailers which would have a positive impact on the centre as a whole; and • Improvement of the retail stock in the town centre to provide better quality outlets. 	<ul style="list-style-type: none"> • Co-op and Somerfield may dominate the retail market leading to closures of independent stores; • The proposed merge of the Co-op and Somerfield may lead to the future closure of one of the stores. • Increased competition from nearby centres; • The centre is located within easy access to a number of regionally important out-of-centre facilities (Junction 27, Birstall etc); which limits its attractiveness; and • The economic downturn may have a negative impact on smaller centres with many independent retailers.

5.26 In conclusion Elland appears to be a healthy centre performing a role as a convenience and service centre. The major issue the centre faces is that there is limited provision of comparison outlets and floorspace. There are also a large number of small vacant outlets. Certain areas of the town



centre may need to be redeveloped, to reduce the number of vacant outlets and to attract modern retailers looking for floorspace to sell comparison goods.

Summary

5.27 This section has looked at the vitality and viability assessments undertaken with respect to the District's six Town Centres. It should be noted that similar assessments have been undertaken for the District's six Local Centres, and these are contained in this report at **Appendix 6**. Table 5.7 below indicates the total amount of convenience and comparison floorspace present within the Town Centres and Local Centres.

Table 5.7: Distribution of Retail, Services and Vacant Floorspace within Calderdale's Defined Centres

Type of Centre	Centre	Retail floorspace (sq m) ¹	Convenience Retail floorspace (sq m)	Comparison Retail floorspace (sq m)	Service Floorspace (sq m) ⁴	Vacant
Town Centres [1]	Brighouse	35,440	10,110	9,230	11,480	4,620
	Elland	14,900	3,570	1,760	7,930	1,640
	Halifax	111,890	14,830	38,860	46,550	11,650
	Hebden Bridge	17,350	2,180	5,730	8,680	780
	Sowerby Bridge	19,006	3,268	5,423	8,958	1,357
	Todmorden	16,170	3,170	2,600	5,750	1,500
Local Centres [2]	All	36,401	9,151	7,880	15,301	4,066

1 Town Centres taken from White Young Green Survey (2009) of all six town centres

2 Local Centres taken from White Young Green Survey (2008) of all six local centres

3 Freestanding Retail Warehouse and solus units taken from Retail Floorspace update 31st March 2008 produced by CBMDC

4 Figures include combined Retail Service, Leisure Service and financial and business services categorises from Goad

These figures are taken from Goad, and represent neither gross nor net floorspace.



6.0 SHOPPING PATTERNS WITHIN THE DISTRICT AND WIDER STUDY AREA

Introduction

- 6.01 As previously highlighted, a key element of the study was to obtain a detailed understanding of the potential catchment of existing centres within the District. A detailed breakdown of the market shares achieved by each centre / store is contained at **Appendix 7**. This section is concerned with the market share of existing centres/ facilities based on shopping trips rather than the amount of expenditure generated. The market shares have been generated from the Household Telephone Survey undertaken in May 2008.

Food Shopping Patterns

Main Food Shopping Patterns

- 6.02 Within the Study Area as a whole, facilities in the District retain some 77% of main food shopping trips. Some 21% of main food shopping trips are directed towards destinations outside of the District with the residual 1% of main food shopping trips being conducted over the internet.
- 6.03 It is evident from examination of the results that existing town centres in Calderdale account for 35% of all shopping trips in the Study Area. Other out-of-centre destinations attract some 42% of shopping trips respectively. Leakage is predominately to destinations in Bradford (15%) and Kirklees (5%).
- 6.04 With respect to the most popular stores identified for main food shopping within the District, these are Asda, Thrumhall Lane, Halifax (17%); Tesco, Haugh Shaw Road, King Cross, Halifax (12%); Tesco, Bradford Road, Brighouse (11%); and Morrisons Keighley Road, Illingworth, Halifax (6%). In terms of foodstores outside of the District, the Morrisons store at Mayo Avenue in Bradford followed by the Asda store in Fixby, Huddersfield (Kirklees authority area) are the most popular, both attracting 4% of main food shopping trips by residents of the Study Area.



- 6.05 The Local Centres and the local parades do not account for any significant main food shopping trips with less than 1% of trips being directed to these centres. Top up shopping trips fair slightly better with Mytholmroyd accounting for 3% of trips and Hipperholme 1% of trips.
- 6.06 Zones 1, 5, 6 and 10 of the Study Area cover Halifax Town Centre and the immediate surrounding urban area. Retention of main food shopping trips in these zones is high with retention levels above 90% in Zones 1 and 5, and Zone 10 attracting 77% of shopping trips directed to Halifax. Zone 6 attracts 100% of all main food shopping trips. Shopping trips are however, directed mainly to out of centre stores rather than stores within Halifax Town Centre. Almost half of trips in Zones 1 and 5 are made to out of centre stores, whereas in Zone 6 more than 78% of trips are to out of centre facilities compared to 67% in Zone 10.
- 6.07 Elland is covered by Zone 3 of the Study Area. Retention of main food shopping trips within these zones is relatively low in comparison to other Zones but still retains 60% of trips. Most of these trips are directed to stores in Elland Town Centre and to edge of centre destinations, which together have a total market share of 45%. The Co-op in the town centre retains 11% of trips and the Tesco, Bradford Road, Brighouse retains 13% of trips. Much of the leakage is to the Asda store in Fixby, Huddersfield attracting 32% of main shopping trips.
- 6.08 Brighouse is located within Zone 2 of the Study Area. Its retention rate is again relatively high in comparison to that of the other Zones (84%). From examination of the statistical tables it is evident that the leakage (16% of total shopping trips) is primarily directed to facilities in Kirklees (12%).
- 6.09 Zone 4 overlaps into the Elland area and also covers the larger Local Centre of Ripponden although no shopping trips are associated with Ripponden. Zone 4 retains 77% of main food shopping trips within the authority area. Trips to Tesco, Haugh Shaw Road, King Cross, Halifax (16%); Asda, Thrumhall Lane, Halifax (18%) and Tesco and Sowerby Bridge (18%) represent the most popular choices for main shopping uses. Leakage from Zone 4 for main food shopping is identified to be at 19%, with more than 17% of main food shopping trips being attracted to the Kirklees authority area (mostly Asda in Fixby, Huddersfield – 15%).
- 6.10 Todmorden is situated in Zone 11 of the Study Area. Within this Zone 80% of main food shopping trips are retained by destinations in the District, although Todmorden itself only retains 4% of



shopping trips. The out-of-centre Morrisons store located on Rochdale Road in Todmorden attracts 64% of main food shopping trips. Some 19% of the trips are directed to areas outside of the District, the highest of which is associated with facilities in Burnley (14%) and in particular the Asda on Princess Way (7%).

- 6.11 In Zone 8 which covers Sowerby Bridge, some 98% of main food shopping trips are retained by destinations within the District. Shopping trips are mainly directed towards the existing Tesco in Sowerby Bridge which has a market share of 47%. 18% of shopping trips are to the Asda on Thrumhall Lane in Halifax.
- 6.12 Zone 12 is geographically the largest Zone although it is generally rural in nature with Hebden Bridge being the main area within this zone. Hebden Bridge retains 36% of all main food shopping trips undertaken within this zone. Overall, Zone 12 retains some 92% of all shopping trips within the district. Popular stores include the Asda store on Thrumhall Lane in Halifax (17%) with a further 14% of trips being made to the Morrisons store on Rochdale Road in Todmorden. The survey results suggest that more residents within this zone use the Co-op store in the town centre (19%) than a number of larger stores elsewhere.
- 6.13 Zone 9 is relatively uninhabited with no major shopping areas. However, 97% of main food shopping trips within this zone are retained in the district. Many of the main food shopping trips are to out of centre locations (49%) within the district, most notably the Asda store at Thrumhall Lane, Halifax, which attracts 25% of main food shopping trips undertaken in this zone. The Tesco store, Haugh Shaw, King Cross, Halifax is the most popular supermarket visited by Zone 9, commanding 33% of trips. Mytholmroyd Local Centre attracts 3% of main food shopping trips particularly to the Co-op, Burnley Road (1.5%) and the Sainsbury's Local, also located on Burnley Road (1.5%).
- 6.14 Much of Zone 7 is located within the Bradford District area with only the Local Centre of Hipperholme and a small amount of Halifax being located within the Zone boundaries, this is reflected with the survey results with just 24% of Main food shopping trips undertaken within the District. 23% of main food shopping trips are conducted at Edge of Centre locations with Tesco, Bradford Road, Brighouse being the most popular (18%). The majority of leakage in this zone is predictably to the Bradford District area (65%). The most popular stores include; Morrison's, Mayo



Avenue, Bradford (20%); Tesco, Halifax Road, Bradford, Buttershaw (12%); Asda, Rooley Lane, Bradford (9%) and Co-op Alldays, Griffen Road, Wyke.

Top-up Food Shopping

- 6.15 Facilities within the District attract 77% of top-up trips by residents of the Study Area. This is comparable to the retention of main food shopping trips identified above (77%). The remaining 23% of shopping trips are undertaken to destinations outside of the Study Area, principally Bradford (18%) and Kirklees (3%)
- 6.16 In terms of destinations within the Calderdale District, Town Centres attract 31% of top up shopping trips in the Study Area. The most popular town centre is Halifax (12%), followed by Elland (5%) and Brighouse (5%) and Hebden Bridge (5%).
- 6.17 Local Centres attract a relatively small proportion of top up shopping destinations consisting of just 6%. 3% of this is in Mytholmroyd and 1% in Hipperholme. The remainder are scattered amongst Ripponden, King Cross and West Vale.
- 6.18 As would be expected, a higher number of destinations appear in the list of named top-up shopping destinations. As such, the relative retention of single stores is lower than that recorded for main food shopping. Local Shops are very popular in the Calderdale area for the provision of top up shopping with Halifax, Elland, Brighouse, Todmorden, Sowerby Bridge and Hebden Bridge all commanding a strong market share. Other popular top-up food destinations are outside of the town centres include: Tesco, Bradford Road, Brighouse (7%); Tesco, Haugh Shaw Road, King Cross, Halifax (9%); Asda, Thrumhall Lane, Halifax ((6%) and Morrison's, Keighley Road, Illingworth, Halifax (4%) Outside of the District, the most popular destinations for top-up shopping are Netto, Mannigham Lane, Bradford (3%); and Co-op foodstore, Towngate, Wyke (2%). Much of the remaining leakage is scattered around the Bradford area (18%) in various local shops.
- 6.19 In the Halifax Town Centre primary zones (Zones 1, 5, 6 and 10) retention of top-up shopping trips in the District is high, with Zone 1 retaining 98%, Zone 5 - 94%, Zone 6 - 97% and Zone 10 retaining 54%. Zone 10 experiences 38% leakage to the Bradford District and in particular the Netto store on Manningham Lane, Bradford (23%). This is expected as much of the zone is located within the Bradford District.



- 6.20 Elland draws the majority of top-up shopping trips from Zone 3 (65%). Overall retention of shopping trips by destinations in the District in this zone is very high (94%) and shows that top up shopping in these areas is very successful. Elland is very successful in retaining top up shopping trips accounting for 65% of the overall top up shopping rate in Zone 3, this is broken down into 34% for the local shops, 17% for the Co-op food store, Huddersfield Road with the Somerfield retaining 14% of trips.
- 6.21 With regard to Brighouse Town Centre, the centre draws top-up shopping trips predominantly from Zone 2. Brighouse accounts for some 33% of top-up shopping trips in Zone 2. This is broken down into 30% using the local shops in the town centre and 3% using the Jack Fulton Store, Bradford Road, Brighouse. Zones 2 overall Top-up-food retention rate is also very high (89%) throughout the district, representing a healthy top-up-food market. Out of Brighouse Town Centre, Tesco on Bradford Road, Brighouse is the most popular destination for top-up-shopping (38%). Although Zone 4 does overlap into the Brighouse area, the majority of its top-up-shopping is retained by the local shops in Halifax Town Centre (14%) and the Somerfield Store in Elland (15%). Ripponden is located within Zone 4 but it is evident from the table that top-up-shopping is not retained within the Local Centre instead the most popular Local Centre in Zone 4 is Mytholmroyd with 9% using the Co-op Late Shop, Burnley Road, Mytholmroyd.
- 6.22 Todmorden attracts the majority of its top-up-shopping from Zone 11 (46%) with all of these trips being linked to the Local Shops. Zone 11 has a high top-up-shopping retention within the district (94%). The major attractor outside of Todmorden Town Centre is Morrison's on Rochdale Road, Todmorden (33%). Some top-up-shopping is directed to Hebden Bridge with 4% going to the Co-op Food Markets, Market Street, Hebden Bridge (4%) and the Spar on Crown Street, Hebden Bridge (2%).
- 6.23 Sowerby Bridge is dominated by Zone 8, top-up-shopping is well represented within the district (33%) with 19% using the local shops in Sowerby Bridge and a further 17% using the local facilities in Halifax. The Local Centres are also well used within Zone 8, with Ripponden, King Cross and Hipperholme all retaining 3% of top up shopping trips; Mytholmroyd fairs even better retaining 6% of trips. Zone 8 is the most efficient Zone at retaining top-up-shopping trips (100%) mainly



due to its central location and the proximity of the Tesco in Sowerby Bridge that retains an additional 33% of all top-up-shopping trips.

- 6.24 Zone 12 is dominated by Hebden Bridge. Hebden Bridge boasts the highest rate of top-up-shopping retention, accounting for 86% of all trips. This is shared between the local shops (48%) and the Co-op Food Markets, Market Street (38%). Mytholmroyd accounts for 3% of top up trips at its Co-op Late Shop on Burnley Road and represents the only top-up-shopping destination for Local Centres within the district. Zone 12 experiences no leakage outside of the district and represents a very efficient top-up-shopping zone.
- 6.25 Zone 7 is almost completely dominated by the Bradford District, this is represented in the survey results with just 19% of top-up-shopping retained within the Calderdale District. The majority of this is associated with the Tesco store on Bradford Road, Brighouse (9%) and the Hipperholme Local Shops (6%). Much of the trips are associated with the Bradford District area (74%) and are spread over a variety of shops across the district with the Tesco store on Halifax Road, Bradford, Buttershaw and the Co-op Foodstore, Towngate, Wyke being the most popular with 19% and 13% respectively.
- 6.26 Zone 9 is relatively uninhabited with only the Local Centre of Mytholmroyd acting as a shopping destination. This is represented in the survey result as the local Centre retains 28% of all top-up-shopping trips of which over 10% of trips are associated with Sainsbury's Local on Burnley Road. Halifax is another popular destination for top-up-shopping in the Zone accounting for 17% of all trips. Zone 9 retains 98% of top-up-shopping trips and represents an efficient Zone for the district.

Non-food (Non-Bulky) Shopping

- 6.27 The telephone survey undertaken by NEMS Market Research asked specific questions about what destinations households visited for a variety of comparison goods. These goods can be divided into bulky and non-bulky goods, with questions asked about shopping habits in relation to sub-sectors of each type of good. In this regard, questions were asked about specific non-bulky goods shopping trips in relation to the following sectors: 'clothing and footwear'; 'books, CDs and DVDs'; 'home furnishings, kitchen equipment, glass and china items'; 'toys, games, bicycles and recreation



goods'; and 'chemist goods'. The shopping patterns identified with respect to each of these goods will now be examined in turn.

Clothing and Footwear

- 6.28 Across the Study Area as a whole, destinations within Calderdale District account for approximately 51% of total clothing and footwear shopping trips. 45% of shopping trips for the purchase of clothing and footwear items are directed towards destinations outside of the District, with 4% of clothing and footwear shopping being carried out online.
- 6.29 Halifax Town Centre is the most important destination for clothing and footwear shopping trips by residents in the Study Area, with a market share of 42%. Indeed, this is a significantly larger market share than the next most important clothing and footwear destination in Hebden Bridge, which attracts just 3% of trips. Other destinations within the District which attract a limited proportion of clothing and footwear shopping trips include Crossley Retail Park, Halifax (1%) and Brighthouse Town Centre (1%).
- 6.30 Outside of the District, Kirklees accounts for the largest proportion of leakage, attracting 12% of clothing and footwear shopping trips. Within the Kirklees authority area Huddersfield Town Centre is the most popular destination with 8% of shopping trips directed to it. Leeds accounts for 11% of leakage with the City Centre accounting for 5% and the White Rose Shopping Centre accounting for 3%. Bradford City centre attracts 4% of overall leakage followed by Burnley Town Centre with 3%.
- 6.31 The retention of shopping trips by destinations in the District is greatest in Zone 10 (71%), Zone 8 (67%), Zone 5 (66%), Zone 6 (65%) and Zone 9 (64%). These zones cover the main town of Halifax and also the surrounding areas, therefore these results are not surprising.
- 6.32 Elland is located within Zone 3 and attracts 6% of shopping trips for clothing and footwear but the main pull within Zone 3 is directed to Halifax, this is not surprising as Halifax has a much wider range of clothing and footwear establishments compared to the other town centres.



6.33 The majority of the Local Centres within the district do not attract any significant levels of shopping trips with only the Queens Road Shopping Centre (2%) and the Mytholmroyd Local Centre (1%) attracting any form of clothing and footwear shopping trip.

Books, CDs and DVDs

- 6.34 In terms of books, CDs and DVDs it is evident that facilities within the District attract 49% of shopping trips, with 29% of trips being directed towards destinations outside of the District and a significant 22% of purchases being undertaken using the internet. This highlights the increasing importance of the online shopping in this particular retail sector.
- 6.35 Across the Study Area Halifax attracts 34% of all shopping trips for the purchase of Books, CDs and DVDs. Halifax Town Centre attracts shopping trips from all of the 12 Survey Zones, although it is most significant in Zone 1 (65%) and Zone 5 (62%).
- 6.36 Other notable destinations within the District for these types of goods include Brighouse (3%) and Hebden Bridge (2%). Brighouse draws most of its shopping trips from Zone 2 (12%), Zone 3 (11%) and Zone 7 (8%), whilst Hebden Bridge draws predominately from Zone 12 (26%) and Zone 9 (3%). The Asda store on Thrumhall Lane, Halifax attracts the largest amount of trips including; Zone 6 (8%), Zone 1 (7%) Zone 5 (5%) and Zone 4 (4%).
- 6.37 In terms of leakage of trips outside of the District, the Kirklees area accounts for a market share of 9%, with Huddersfield Town Centre accounting for 6% of shopping trips across the Study Area. Kirklees draws the highest proportion of its shopping trips from Zone 3 (25%) and Zone 2 (25%). Leeds attracts 7% of shopping trips for the purchase of books, CDs and DVDs, with Leeds City Centre being the most significant destination (4%) followed by the White Rose Shopping Centre (2%). Leeds City Centre is particularly important in Zone 7 within which it attracts 14% of shopping trips. Bradford also accounts for a significant amount of shopping trips for Books, CDs and DVDs accounting for a market share of 5%, Bradford City centre accounts for the highest proportion of shopping trips (4%) and unsurprisingly Zone 7 is the most attracted (23%).
- 6.38 Internet spending is significant in all of the 12 survey zones. The greatest proportion of trips are attracted from Zone 12 within which 33% books, CDs and DVDs purchases are conducted using the



internet, possibly due to the isolated nature of the zone. However, the internet accounts for 22% of all trips across the Calderdale District.

Small Household Goods

- 6.39 Bradford District retains the majority of shopping trips made by residents in the Study Area for the purchase of small household goods with a market share of 52%. 43% of shopping trips are made to facilities outside of the District and 5% are conducted over the internet.
- 6.40 Within the District, the most popular destinations are Halifax Town Centre (36%), Brighouse Town Centre (5%), Todmorden Town Centre (1%) and Asda, Thrumhall Lane, Halifax (2%).
- 6.41 Leaked shopping trips in this sector are directed towards Kirklees authority area (14%), Bradford (13%) and greater Leeds (7%) for the most part. Huddersfield Town Centre is once again an important destination in this sector, attracting 4% of shopping trips and being particularly attractive to Zone 3 (23%), Zone 2 (14%) and Zone 4 (10%). However both Bradford City Centre (6%) and Leeds City Centre (5%) are more popular destinations for small household goods. Other key destinations outside of the District are Alston Retail Park (6%), Junction 27 Retail Park, Kirklees (4%) and Birstall Shopping Park (4%).
- 6.42 Halifax Town Centre draws at least some shopping trips from all of the 12 Survey Zones, with the greatest proportion of trips recorded in Zone 6 within which it has a market share of 68%. Brighouse is the most important destination in Zone 2 (25%) and Todmorden attracts a large number of trips from Zone 11 (19%).

Toys, games, bicycles and recreation goods

- 6.43 Facilities within the District attract a total of 57% of shopping trips for toys, games, bicycles and recreation goods. Shopping trips for such purposes are directed to the following main destinations in the District: Halifax Town Centre (46%), Brighouse (3%), Hebden Bridge (2%) and Todmorden (1%). Local Centres within Calderdale account for less than 1% of shopping trips, with out-of-centre destinations accounting for 3% of trips. It is notable that Sowerby Bridge Town Centre attracts less than 1% of trips, indicating a lack of provision in this sector of non-bulky goods.



- 6.44 Some 33% of shopping trips that are undertaken by residents of the Study Area are directed towards destinations that lie outside of the Calderdale District Boundary. These include destinations in Kirklees authority area (12%), Leeds (7%) and Bradford (7%). Individual destinations of significance outside of the District include Bradford City Centre (6%), Birstall Shopping Park (6%), Huddersfield Town Centre (5%), Leeds City Centre (5%) and Burnley Town Centre (3%).
- 6.45 Retention by destinations in the Calderdale District is greatest in Zone 6 (89%), Zone 5 (76%), Zone 9 (76%) and Zone 12 (76%). Zones 6 and 5 cover the Halifax Town Centre area, and it consequently attracts a sizable proportion of shopping trips in these zones. Zone 12 covers Hebden Bridge and within this zone Hebden Bridge attracts 33% of all shopping trips which is the second largest retention rate outside of Halifax Town Centre.
- 6.46 Expenditure that is directed to facilities elsewhere is greatest in Zone 7 (63%), Zone 10 (62%) and Zone 2 (53%). Zone 7 extends into the Bradford District and hence the majority of shopping trips (32%) are directed to facilities in the Bradford area. Zone 2 borders the Kirklees authority area and thus 33% is leaked to that area particularly to the Huddersfield Town Centre (19%) and (15%). Zone 11 is relatively remote and it's nearest large shopping centre is Burnley, thus 40% of trips are leaked there.
- 6.47 Internet spending varies markedly from less than 3% of shopping trips in Zone 3 and Zone 7 to 23% of shopping trips in Zone 12, this may be explained by the remoteness of the area as Zone 12 suffers from no toys, games, bicycles and recreation goods shopping leakage.

Chemist goods

- 6.48 The retention of shopping trips for chemist goods by existing destinations in the District is 76%. This is the highest retention rate out of any of the non-bulky goods categories, and indicates that people are not prepared to travel as far to purchase this type of goods compared to other sorts of non-bulky goods.
- 6.49 Retention of shopping trips for individual town centres is also higher than for other categories of non-bulky goods, with residents tending to shop in more local destinations for such goods. Halifax

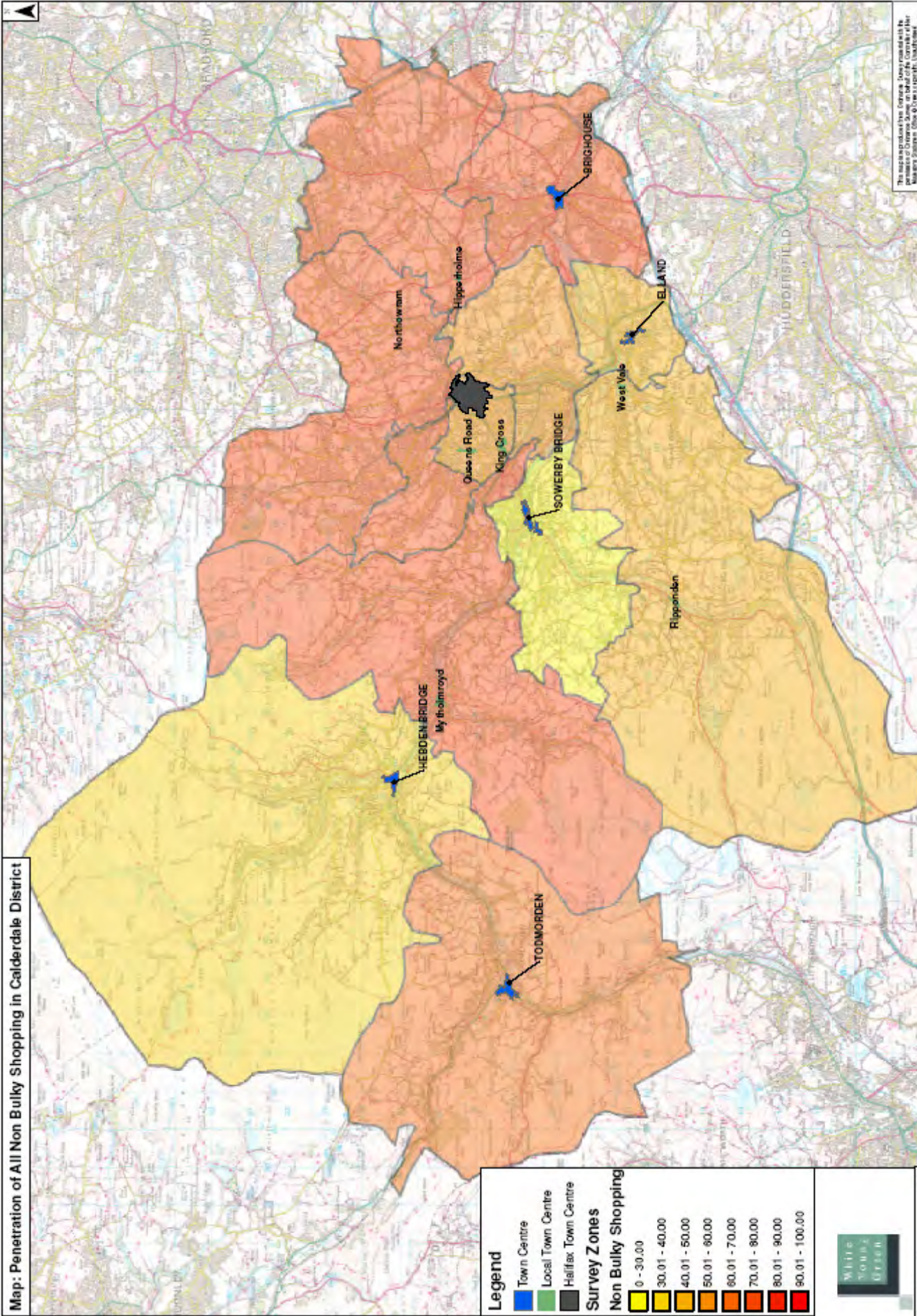


attracts 45% of shopping trips across the Study Area for chemist goods. This is followed by Brighouse (10%), Todmorden (4%), Hebden Bridge (3%) and Sowerby Bridge (2%).

- 6.50 In total the Local Centres in the District account for 2% of shopping trips, Edge-of-centre locations attract 3% of trips including 2% at the Tesco Store on Bradford Road, Brighouse. Out-of-Centre locations account for 4% of all chemist shopping trips with the Asda store on Thrumhall Lane accounting for 2%.
- 6.51 Across the Study Area, 21% of shopping trips are directed to destinations outside of the District. These are principally directed towards destinations in Bradford which has an overall market share of 9%, although Kirklees is also important with a 6% market share. Leakage is particularly high in Zone 7 (65%), with trips mainly directed to facilities in Bradford City Centre (20%).



Map: Penetration of All Non Bulky Shopping in Calderdale District



Legend

- Town Centre
- Local Town Centre
- Halifax Town Centre

Survey Zones

Non Bulky Shopping

- 0 - 30.00
- 30.01 - 40.00
- 40.01 - 50.00
- 50.01 - 60.00
- 60.01 - 70.00
- 70.01 - 80.00
- 80.01 - 90.00
- 90.01 - 100.00



This map has been prepared by Wilkins Consultants for the Calderdale Council. It is provided for the use of the Council and its officers only. It is not to be used for any other purpose without the prior written consent of Wilkins Consultants.



- 6.52 Internet spending accounts for the remaining 3% of shopping trips by residents of the Study Area. Interestingly no spending whatsoever is conducted online for chemist goods by residents in Zone 5 and Zone 9, although all other zones record at least some online spending.

Bulky Goods Shopping

- 6.53 Similar to non-bulky goods, bulky goods can be broken down into a number of distinct sub-sectors. These are: electrical items; DIY goods; and furniture, carpets and floor coverings. Each of these sub-sectors will now be examined in term to ascertain how residents shop for such goods across the Study Area.

Electrical Goods

- 6.54 Facilities within the Calderdale District retain approximately 61% of shopping trips that are made by residents of the Study Area for the purchase of such goods. 26% of shopping trips are direct towards destinations that are outside of the District, and the remaining 13% are conducted via the internet.
- 6.55 In terms of the District itself, Halifax Town Centre accounts for the largest proportion of shopping trips with a market share of 45% overall. Halifax Town Centre draws from all the Survey Zones, although it records the highest proportion of shopping trips in Zone 5 (76%). Brighouse achieves a market share across the Study Area of 3%, which compares to 2% attracted to Halifax Retail Park, 2% directed towards Elland, 1% towards Todmorden and less than 1% towards Hebden Bridge and Sowerby Bridge.
- 6.56 Local Centres in the Calderdale District account for less than 1% of electrical goods shopping trips. Edge-of-centre destinations in the District account for a further 1% of electrical goods shopping trips, and out of centre destinations accounting for 7% of trips including Halifax Retail Park (2%) and Charles Town Retail Park (2%)
- 6.57 In terms of leakage, destinations in Kirklees authority area attract 10% of electrical shopping trips with Huddersfield Town Centre (5%) and Leeds Road Retail Park (2%) being key facilities. The Leeds authority area draws mainly from Zone 2 (47%). Bradford authority area accounts for 9% of shopping trips overall, with Bradford City Centre itself attracting 7% of shopping trips. The Bradford District is particular attractive to shoppers in Zone 7 (42%) and Zone 1 (6%)
- 6.58 Internet spending is fairly high in all of the survey zones, although Zone 12 records the highest level of internet purchases with 21% of all electrical purchases in this zone conducted over the internet.

DIY Goods



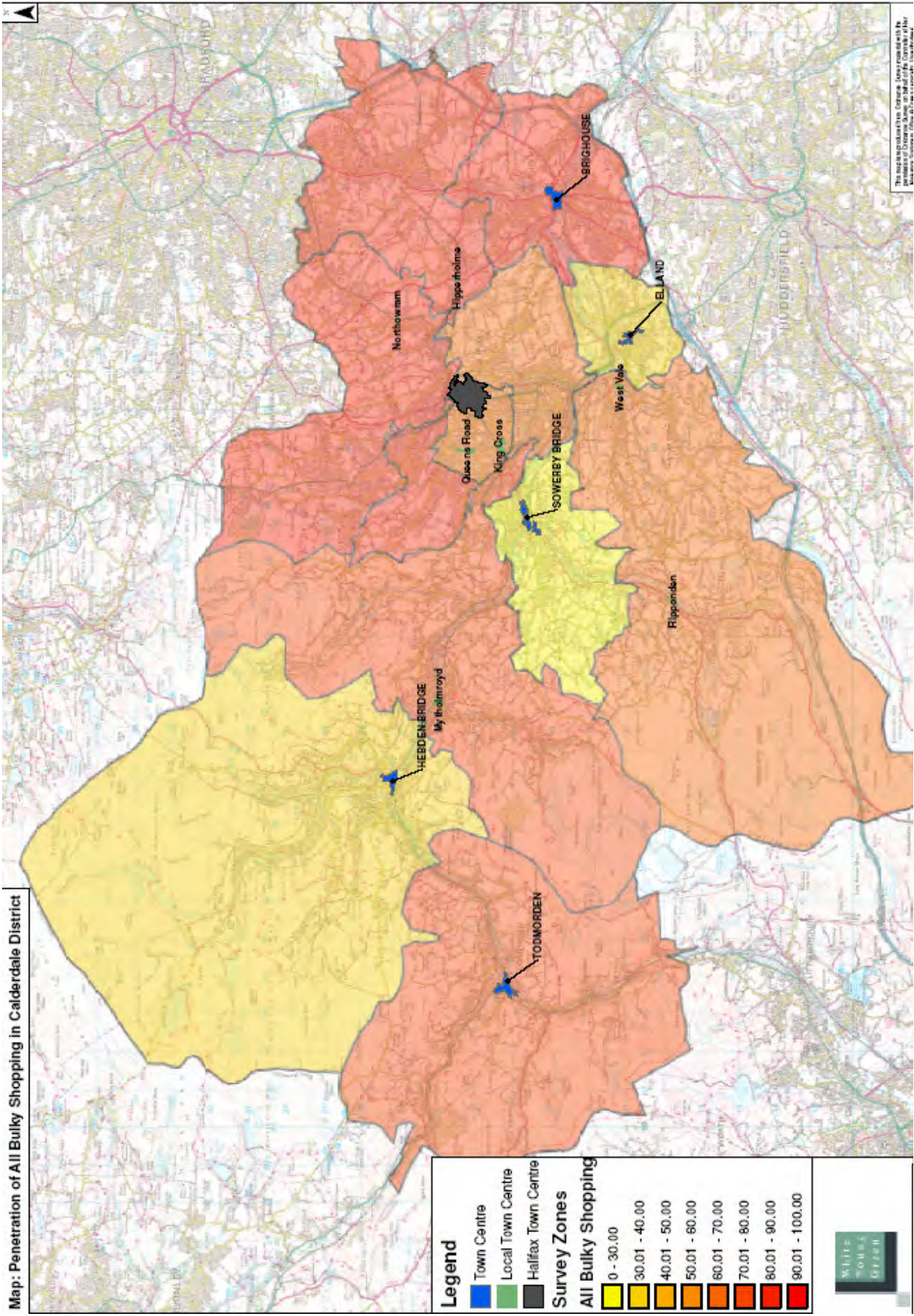
- 6.59 The retention rate of DIY shopping trips by residents of the Study Area is high, with a total of 70% of trips directed towards destinations within the District. As would be expected, the single most popular destination for DIY shopping trips are large-format DIY stores, namely B & Q, Shroggs Road, Halifax (24%) and B & Q, Pellon Lane (23%). Halifax Town Centre remains an important destination however, with an overall market share of 12%. Elland attracts 4% of shopping trips, with Todmorden attracting 2% and Hebden Bridge attracting 1%.
- 6.60 Leakage accounts for 28% of DIY shopping trips in the Study Area, with just 1% of purchased conducted online. Key facilities outside of the District are identified to be B&Q, Euroway Trading Estate (11%) and B & Q, Leeds Road Retail Park (5%). Clearly, the survey results show that out-of-centre destinations are favoured over town centres for the purchase of DIY goods.

Furniture Goods

- 6.61 Some 59% of shopping trips for the purchase of furniture goods are directed towards destinations in the Calderdale District. 38% of trips are directed towards destinations that lie outside of the District, and 3% is undertaken online.
- 6.62 Within the District, Town Centres are the preferred location for furniture goods shopping trips attracting 51% of trips. Halifax Town Centre attracts 42% of trips, followed by Brighouse (4%), Elland (2%), Todmorden (2%) and Hebden Bridge (1%). In all cases the zones that are nearest to each of the town centres attract the highest proportion of shopping trips by residents of those zones.
- 6.63 Local Centres account for 4% of furniture goods shopping trips with other out-of-centre destinations accounting for an additional 4% of trips.
- 6.64 Outside of the District, it is Kirklees authority area that attracts the greatest proportion of shopping trips with a 14% market share. Birstall Shopping Park is the most significant location with a 5% market share across all the survey zones, although it draws mainly from Zone 2 (10%) and Zone 12 (10%). Facilities in Bradford attract 11% of shopping trips for furniture goods with Bradford City Centre being particularly important with an 8% market share. This destination does not draw from all of the Survey Zones but is particularly important to Zone 7 (42%) and Zone 6 (7%). Leeds authority area attains a market share of 7%, with Leeds City Centre accounting for the majority of this with a 5% market share. This is spread out across all of the survey zones but is particularly prevalent in Zone 2 (15%) and Zone 3 (9%)



Map: Penetration of All Bulky Shopping in Calderdale District



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Linked Trips

- 6.65 The Household Survey also asked specific questions relating to whether linked trips were made between journeys to main food shopping destinations, and between their main food shopping destination and other centres/ facilities for any other activity.
- 6.66 The Household Survey identified that when travelling to their main food shopping destination, 74% of residents within the Study Area did not combine this trip with any other activity. However, 13% of residents indicated that they combined their journey to their main food shopping destination with travelling to or from work.
- 6.67 Some 8% of respondents stated that they combined main food shopping with non-food shopping. 1% linked their trips with visiting friends or family whilst a further 1% linked the trip to other non food shopping.
- 6.68 Of those respondents who link their main food shopping with non-food shopping only 2% indicated that they did this at their main food shopping destination. Consequently, the most popular destination to undertake their main food shopping as part of a linked trip was Halifax Town Centre (59%). Brighthouse Town Centre was identified to be the second most popular destination (16%), primarily for shoppers from within Zone 2 (67%) and Zone 7 (50%). There is less evidence of linked trips between respondents' main food shopping destination and other town centres in the district, although Todmorden Town Centre attracted some 2% of those respondents who undertook non-food shopping at the same time as their main food shop.

Customer Preferences

- 6.69 The Household Survey also sought to identify why respondents chose not to shop in Halifax Town Centre for clothing and footwear goods. This indicated that the main reason residents of the Study Area chose to shop at other destinations over Halifax Centre was because of the choice of shops selling non food goods, with 21% of residents confirming this. A further 20% of residents who did not shop in Halifax Town Centre for their clothing and footwear goods did so due to the choice of non-food goods available (20%), with other popular responses including nearer to home (18%), car parking provision (8%) and quality of shops selling non food goods (6%).



6.70 It is significant to note that within the zones that are closest to Halifax Town Centre, the most frequently cited reason for not visiting the town centre is due to either the choice of non food goods available or the choice of shops selling non food goods. In all other zones the most frequently recorded answer given for why respondents had not visited Halifax Town Centre for clothing and footwear goods is the choice of shops selling non food goods.

Internet Shopping

- 6.71 The Household Survey (excluding 'varies/no pattern responses') identified that for main food purchases, approximately 1% of respondents within the Study Area undertook convenience goods shopping via the internet. Of those that did use the internet, the greatest proportion purchased goods from Tesco (71%) followed by ASDA (29%).
- 6.72 In terms of clothing and footwear goods, the Household Survey identified that just under 5% of respondents within the Study Area purchased goods via the internet. This compares to 10% for recreational goods, 5% for small household goods, 3% for chemist goods and a significant 22% for books, CDs and DVDs. Indeed for books, CDs and DVDs the market share accounted for by the internet is greater than that recorded for all other destinations except for Halifax Town Centre (33%).
- 6.73 In terms of furniture goods, the Household Survey identified that 7% of respondents used the internet / home delivery for their last purchase, which compares to less than 3% for DIY goods. In contrast, some 14% of respondents stated that they last purchased electrical goods via the internet.
- 6.74 Of those respondents who did purchase goods or services via electronic home shopping, CDs, music and videos was the most popular purchase, with 41% of respondents purchasing these goods. Other popular purchases include Books (32%), Clothes (27%) and small electrical items (19%).

Summary

6.75 Based on the Household Survey undertaken, it is possible to identify the following key findings:



Food Shopping

- 6.66 The principal 'main food' shopping destinations in the District (in terms of the proportion of shopping trips that they attract) are identified to be: Asda, Thrumhall Lane, Halifax (17%); Tesco, Haugh Shaw Road, Halifax (12%); Tesco, Bradford Road, Brighouse (11%); and Sainsbury's, Wade Street, Halifax (9%). Collectively, these four stores account for some 49% of main food shopping trips undertaken within the Study Area. Overall, convenience goods facilities in Calderdale District attract 77% of main food shopping trips undertaken by residents within the Study Area. Within the District, out-of-centre facilities account for the largest proportion of main food shopping trips (42%) compared to edge of centre (28%) and then town centre destinations (7%).
- 6.67 The Household Survey identified that 'top-up' convenience shopping is more localised. Within the Study Area, Town Centres still attract a large proportion of 'top-up' shopping trips (31%) compared to main food shopping trips (7%). The proportion of 'top-up' shopping trips directed towards Local Centres (5%) and out-of-centre destinations (20%) remains high but below that obtained for main food shopping. As a whole, the Calderdale District retains approximately 77% of top-up shopping trips undertaken by residents of the Study Area.
- 6.68 The patterns of convenience good shopping in the Study Area recorded by the Household Survey are as follows:



Table 6.1: Market Share of Main Centres/Destinations for Convenience Goods Shopping

	Main	Top-up
TOWN CENTRES		
Halifax	3.9%	12.3%
Sowerby Bridge	0.1%	1.2%
Todmorden	0.3%	3.1%
Brighouse	0.5%	4.7%
Hebden Bridge	1.4%	4.6%
Elland	1.2%	4.7%
LOCAL CENTRES		
Mytholmroyd	0.2%	2.9%
Ripponden	0.0%	0.2%
Hipperholme	0.0%	1.2%
King Cross	0.0%	0.9%
West Vale	0.0%	0.3%
OTHER PARADES	0.2%	3.1%
EDGE OF CENTRE	28.1%	17.9%
OUT OF CENTRE	41.7%	20.1%
TOTAL CALDERDALE DISTRICT	77.4%	77.2%
OUTSIDE CALDERDALE DISTRICT	21.6%	22.5%
(Internet/ home delivery	1.0%	0.3%
TOTAL	100%	100%

6.82 Overall, approximately 23% of main food and 'top-up' shopping trips (including internet/ home delivery) undertaken within the Study Area are directed to facilities outside the district. These are primarily to facilities in Kirklees and Bradford. The market share achieved by facilities within Calderdale District from the Study Area is relatively high with limited shopping trips being made to competing destinations elsewhere. Asda and Tesco appear to be the two key retail destinations in the District, accounting for four of the top six most popular destinations for main food shopping trips

Non-Food Shopping

6.83 In terms of non-bulky comparison goods shopping, facilities in the Calderdale District achieve lower market shares than those identified for convenience goods shopping. However, Halifax Town centre still represents a strong destination in this sector as a result of its size and geographical location, although the internet is also an important shopping destination. A similar pattern is identified for electrical and furniture goods for which leakage is higher than that recorded for convenience goods, although the proportion of shopping trips retained in the District in the DIY



goods sector is comparable to that for main food shopping trips. This indicates that the District is well provided for in this sector.

6.84 The pattern for comparison shopping within the Study Area recorded by the Household Survey is identified as follows:

Table 6.2: Market Share of Main Centres/Destinations for Comparison Goods Shopping

	<u>Clothing & Footwear</u>	<u>Books, CDs, etc.</u>	<u>Household</u>	<u>Toys, Games, etc.</u>	<u>Chemist</u>	<u>Electrical</u>	<u>Furniture</u>	<u>DIY</u>
TOWN CENTRES	47.2%	40.7%	43.7%	52.8%	62.2%	52.6%	51.8%	20.2%
<i>Halifax</i>	42.1%	33.9%	36.0%	46.4%	44.7%	45.4%	42.2%	12.1%
<i>Brighouse</i>	1.4%	3.29%	4.6%	3.2%	9.5%	2.9%	4.4%	4.3%
<i>Elland</i>	0.5%	0.2%	0.3%	0.0%	2.0%	2.1%	2.0%	0.2%
<i>Hebden Bridge</i>	2.5%	1.7%	0.9%	1.8%	2.7%	0.3%	1.2%	1.3%
<i>Sowerby Bridge</i>	0.1%	0.6%	0.6%	0.2%	2.4%	0.4%	0.4%	0.0%
<i>Todmorden</i>	0.6%	1.0%	1.3%	1.2%	3.9%	1.5%	1.6%	2.2%
LOCAL CENTRES								
<i>Rippondon</i>	0.0%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	0.0%
<i>Queens Road</i>	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%
<i>West Vale</i>	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%
<i>King Cross</i>	0.0%	0.3%	0.0%	0.2%	0.2%	0.1%	0.3%	0.0%
<i>Mytholmroyd</i>	0.2%	0.1%	0.2%	0.2%	0.7%	0.1%	0.8%	0.2%
<i>Hipperholme</i>	0.0%	0.0%	0.0%	0.0%	0.4%	0.0%	1.5%	0.0%
LOCAL PARADES	0.0%	0.2%	0.2%	0.0%	1.2%	0.6%	0.8%	0.5%
EDGE OF CENTRE	0.4%	3.3%	2.7%	0.8%	3.1%	1.0%	0.0%	0.1%
OUT OF CENTRE	2.4%	4.5%	5.5%	2.7%	4.4%	6.7%	3.1%	49.4%
TOTAL CALDERDALE	50.6%	49.2%	52.3%	56.6%	75.9%	61.1%	59.3%	70.4%
<i>Leeds City</i>	11.3%	6.9%	7.1%	7.4%	2.5%	2.8%	6.9%	0.6%
<i>Bradford City</i>	5.7%	5.9%	13.4%	7.0%	8.6%	9.4%	10.7%	13.0%
<i>Kirklees District</i>	12.4%	9.2%	14.3%	11.7%	6.1%	10.0%	13.7%	11.0%
<i>Other Outside of District</i>	15.7%	6.9%	8.2%	7.7%	4.0%	4.4%	6.4%	3.9%
TOTAL OUTSIDE DISTRICT	45.1%	28.9%	43.0%	33.8%	21.2%	26.5%	37.7%	28.5%
(Internet/ Home Delivery)	4.3%	21.9%	4.7%	9.6%	2.9%	12.4%	3.1%	1.1%
TOTAL	100%	100%	100%	100%	100%	100%	100%	100%



7.0 POPULATION AND EXPENDITURE

7.01 This section of the report assesses the current population and expenditure generated within Calderdale District and the wider area for both convenience and comparison goods. This expenditure is applied to the identified market shares identified in Section 6 to identify expenditure flows.

Study Area Population

7.02 The population within each postal code zone has been calculated using MapInfo AnySite Report Data (2006 estimate) from 2006 to 2014. Thereafter (2015 to 2026) the population has then been projected forward based on the interpolated growth (as identified by MapInfo) for the period between 2014 and 2018 for each zone.

7.03 The adopted Study Area is identified to contain a resident population of approximately 228,901 people (2009 estimate), which is set to increase to 236,801 people in 2014, to 246,216 people by 2019 and to 259,945 by 2026. This represents an increase of 31,044 people (or 13.6%) between 2009 and 2026.

7.04 Population figures (derived from MapInfo) are provided for each of the twelve survey zones. For the purposes of this study, population and expenditure has been calculated at five-year intervals in accordance with PPS6 (i.e. 2014 and 2026) this corresponds with the timeframe for the RSS. Table 7.1 provides a detailed breakdown of the forecast population change within each survey zone through to 2026.



Table 7.1: Population by Survey Zone (2009 – 2026)

Survey Zone	2009	2014	2019	2026
1	23,120	23,533	24,104	24,690
2	27,007	28,202	29,642	31,782
3	10,144	10,676	11,296	12,224
4	16,877	17,551	18,353	19,539
5	15,789	17,037	18,474	20,691
6	16,688	16,925	17,252	17,720
7	34,989	35,688	36,402	37,425
8	12,669	13,343	14,136	15,327
9	15,574	16,376	17,301	18,685
10	32,062	32,704	33,356	34,737
11	15,082	15,416	15,846	16,468
12	8,900	9,350	9,874	10,658
TOTAL	228,901	236,801	246,216	259,945

Source: MapInfo AnySite (2006 data)

Retail Expenditure

- 7.05 In order to calculate convenience and comparison expenditure per head, WYG has utilised MapInfo AnySite data, which provides detailed information on local consumer expenditure and which takes into account the socio-economic characteristics of the local resident population. MapInfo is a widely accepted source of expenditure and population information and is used nationally.
- 7.06 Expenditure forecasts have been derived from a combination of MapInfo Brief 08/02 (September 2008) and the latest forecast by Oxford Economics (Retail Spending Outlook Revised – March 2009). The latest forecasts produced by Oxford Economics take into account the ongoing downturn in the UK economy which is clearly having an impact on the retail sector.
- 7.07 In terms of convenience goods, MapInfo identify an actual growth rate of +2.4% per annum between 2006 and 2007 (Table 1 of 08/02). With regard to forecasting, the latest estimates by Oxford Economics identifies a forecast growth rate of +2.2% between 2007 and 2008, a decline in annual expenditure of -0.04% between 2009 and 2012 and then an increase of +0.57% per annum post 2012 once the UK economy starts to recover. This trend is reflective of the latest forecasts by Experian. For the purposes of this study these forecast growth rates have been utilised up to 2026.
- 7.08 For comparison goods, MapInfo identifies an actual growth rate from 2006 to 2007 of +6.0% (Table 1 of 08/02). In terms of forecasting, Oxford Economics identify a growth in annual comparison goods expenditure of +4.91% between 2007 and 2008, growth of +0.3% per annum



between 2009 and 2012 and an increase level of growth of +4.35% per annum post 2012. Again, for the purposes of this study this forecast growth rates has been utilised up to 2026.

7.09 Using these forecasts, it is possible to produce expenditure estimates for each survey zone in 2009, 2014, 2019 and 2026. The assessment takes into account both retail expenditure growth and population change. Tables 7.2 and 7.3 provide a summary of the estimated growth in retail expenditure per person within the Study Area.

Table 7.2: Convenience Goods Expenditure per Person per Annum (2009 –2026)

Survey Zone	2009	2014	2019	2026
1	1,432	1,447	1,488	1,549
2	1,681	1,698	1,747	1,818
3	1,594	1,611	1,657	1,724
4	1,717	1,734	1,784	1,857
5	1,683	1,700	1,749	1,820
6	1,539	1,555	1,599	1,664
7	1,589	1,605	1,652	1,719
8	1,635	1,652	1,699	1,768
9	1,714	1,731	1,781	1,853
10	1,594	1,611	1,657	1,724
11	1,630	1,646	1,694	1,763
12	1,721	1,738	1,789	1,861

Source: MapInfo AnySite (2006 data) and MapInfo Information Brief 08/02 (September 2008) and Oxford Economic Forecasts – Retail Spending Outlook (March 2009)
At 2006 prices

Table 7.3: Comparison Goods Expenditure per Person per Annum (2009 – 2026)

Survey Zone	2009	2014	2019	2026
1	2,614	2,873	3,554	4,788
2	3,222	3,540	4,380	5,902
3	2,993	3,288	4,068	5,481
4	3,413	3,750	4,640	6,251
5	3,252	3,574	4,421	5,957
6	2,844	3,125	3,866	5,209
7	3,003	3,299	4,082	5,499
8	3,105	3,412	4,221	5,687
9	3,335	3,664	4,534	6,108
10	2,999	3,295	4,077	5,493
11	3,093	3,398	4,205	5,665
12	3,428	3,766	4,659	6,277

Source: MapInfo AnySite (2006 data) and MapInfo Information Brief 08/02 (September 2008) and Oxford Economic Forecasts – Retail Spending Outlook (March 2009)
At 2006 prices

7.10 As illustrated above, it is anticipated that expenditure per person on convenience goods will increase by approximately 8% between 2009 and 2026. This growth in convenience goods expenditure compares to growth in comparison goods expenditure per person of 83% over the same period.



Convenience Goods Expenditure

- 7.11 It is estimated that in 2009 the resident population within the Study Area generates some £369.9m of convenience goods expenditure (at 2006 prices). By 2026, this expenditure is estimated to be £455.3m, an increase of some £85.4m (or 23%) between 2009 and 2026.

Main Food and 'Top-up' Shopping

- 7.12 As part of the Household Survey, respondents were specifically asked questions in relation to the proportion of money they spend on their main food shopping and 'top-up' shopping. Analysis of these results indicates that approximately 74.6% of total convenience goods expenditure is spent on main food shopping and 25.4% on 'top-up' shopping. Therefore, in order to analyse the survey results for both main and 'top-up' shopping trips, WYG has sub-divided the total convenience expenditure for the identified Study Area using the commonly held assumption of 75/25 split.
- 7.13 By applying these expenditure estimates per person to the identified population of the defined Study Area, convenience goods expenditure on main food shopping is estimated to be approximately £277.4m in 2009. This expenditure is set to increase by 18% between 2009 and 2026 to £341.5m. With regard to 'top-up' shopping, in 2009 the resident population within the Study Area is estimated to generate £92.5m of convenience goods expenditure, increasing to £113.8m by 2026, representing an increase of 23% (or £21.3m).

Comparison Goods Expenditure

- 7.14 By 2026 the population within the Study Area is estimated to generate £1,468.6m of comparison goods expenditure, increasing from £703.9m in 2009. This represents an increase of almost 109% (or £764.7m) between 2009 and 2026.
- 7.15 As previously highlighted, for the purposes of this study comparison goods expenditure has also been divided into eight sub-categories: Electrical; Furniture; DIY ('bulky goods') and what are referred to as 'non-bulky' goods: 'Clothing and Footwear'; 'Chemist'; 'Toys, Games, Bicycles and Recreation Goods'; 'Books, CDs and DVDs' and 'Small Household Goods'. Although PPS6 stipulates that when assessing quantitative need for additional development expenditure levels should relate to the class of goods to be sold within the broad categories of 'convenience' and 'comparison'



goods, 'bulky and 'non-bulky' goods have also been examined in order to provide a qualitative overview.

7.16 With uniform rates of growth forecast prescribed by MapInfo (08/02) and Oxford Economics in each of the 'bulky' and non-bulky goods categories it is estimated that by 2026, the total proportion of spend on 'bulky' type goods will remain relatively unchanged up to 2026. Table 7.4 provides a breakdown of different comparison goods expenditure within the defined Study Area by type of goods.

Table 7.4: Comparison of Retail Expenditure in 'Bulky' and Non Bulky Goods (2009 - 2026)

Year	Bulky Goods (£m)			Non Bulky Goods (£m)					Total Comparison Goods (£m)
	<i>Furniture</i>	<i>DIY</i>	<i>Electrical</i>	<i>Clothing</i>	<i>H/hold</i>	<i>Books, etc.</i>	<i>Recreation</i>	<i>Chemist</i>	
2009	73.8	50.4	75.5	177.4	75.4	40.6	125.8	85.0	
Sub-Total		199.7				504.2			703.9
2014	84.0	57.4	85.9	201.8	85.8	46.1	143.1	96.7	
Sub-Total		227.2				573.6			800.8
2019	108.1	73.8	110.6	259.8	110.5	59.4	184.2	124.6	
Sub-Total		292.6				738.5			1,031.1
2026	154.0	105.2	157.5	367.0	157.5	84.6	262.4	177.5	1,468.6
Sub-Total		416.7				1,051.9			1,468.6

Source: WYG (2009)

7.17 Table 7.4 above indicates that collectively 'Bulky' Goods expenditure within the Study Area is estimated to represent 28% (£199.7m) of comparison goods expenditure in 2009. Accordingly, expenditure on non-bulky (clothing and footwear, Books, CD's, DVD's, small household etc) within the Study Area represents 72% (or 504.2m) of total comparison goods expenditure in 2009.

Calderdale's Market Share

7.18 Having calculated the likely levels of expenditure that are generated by the resident population living within the defined Study Area it is also important to understand what proportion of this expenditure is currently attracted to retail facilities within Calderdale.

7.19 As previously highlighted, a critical element of the overall study has involved the completion of more than 1,200 household telephone interviews within the defined Study Area. By analysing the results from the survey it has been possible to understand the likely levels of expenditure that is captured by facilities in the District. The estimated market shares for the various expenditure categories are highlighted below **(N.B. The market shares may differ slightly from those**



identified in Section 6 of this study as the market shares below are based on expenditure whereas Section 6 is based on the proportion of shopping trips).

Table 7.5: Calderdale Current Market Shares (2009)

	Market Shares by Category (%)										TOTAL [^]
	Convenience Goods		Comparison Goods								
	Main	Top-up	Furniture	DIY	Electrical	Clothing	H'hold	Books, etc	Recreation	Chemist	
Halifax	3.8	12.3	42.2	12.1	45.4	42.1	36.0	33.9	46.4	44.7	30.2
Brighouse	0.5	4.7	4.4	4.3	2.9	1.4	4.6	3.3	3.2	9.5	3.3
Elland	1.2	4.7	2.0	0.2	2.1	0.5	0.3	0.2	0.0	2.0	1.7
Hebden Bridge	1.4	4.6	1.2	1.3	0.3	2.5	0.9	1.7	1.8	2.7	1.3
Sowerby Bridge	0.1	1.2	0.4	0.0	0.4	0.1	0.6	0.6	0.2	2.4	0.5
Todmorden	0.3	3.1	1.6	2.2	1.5	0.6	1.3	1.0	1.2	3.9	1.2
Local Centres	0.2	5.5	3.6	0.2	0.2	0.6	0.2	0.5	0.3	2.0	1.0
Local Parades	0.2	3.1	0.8	0.5	0.6	0.0	0.2	0.2	0.0	1.2	0.5
Edge of Centre	28.1	17.9	0.0	0.1	1.0	0.4	2.7	3.3	0.8	3.1	9.5
Out-of-Centre	41.7	20.1	3.1	49.4	6.7	2.4	5.5	4.5	2.7	4.4	16.9
Sub-Total	77.4	77.2	59.3	70.4	61.1	50.6	52.3	49.2	56.6	75.9	67.9
Leakage	21.6	22.5	37.7	28.5	26.5	45.1	43.0	28.9	33.8	21.2	27.4
Internet	1.0	0.3	3.1	1.1	12.4	4.3	4.7	21.9	9.6	2.9	4.8

Source: Calderdale Household Shopping Survey (2008)

[^] Based on cumulative market share of all categories (food and non-food)

7.20 Table 7.5 indicates that destinations within Calderdale retain a total of 77.4% of main food shopping expenditure generated by residents within the Study Area. In terms of 'top-up' convenience shopping, existing facilities within Calderdale attract a comparable proportion of shopping trips undertaken in the Study Area. This equates to £216.7m of main food expenditure and £71.8m of 'top-up' expenditure generated in the Study Area in 2009 being directed to destinations in the District. Accordingly, facilities within the District attract £288.6m of food shopping expenditure generated in the Study Area.

7.21 Overall, facilities in the District attract approximately 82.2% of the total convenience goods expenditure generated in the Study Area (£369.9m). Understandably, the level of retention differs within different zones. Part of the Survey Zone which covers the area to the north of Halifax town centre (Zone 6) attracts more than 99% of convenience goods expenditure generated in the zone. Other high retention zones include Zone 1 (95.8%); Zone 5 (95.7%); Zone 8 (98.8%); Zone 9 (97.4%) and Zone 12 (93.7%). In contrast, the lowest zone for retention of expenditure was Survey Zone 7, with 27%, which covers the eastern part of the District and includes parts of the neighbouring authority of Bradford Metropolitan District.



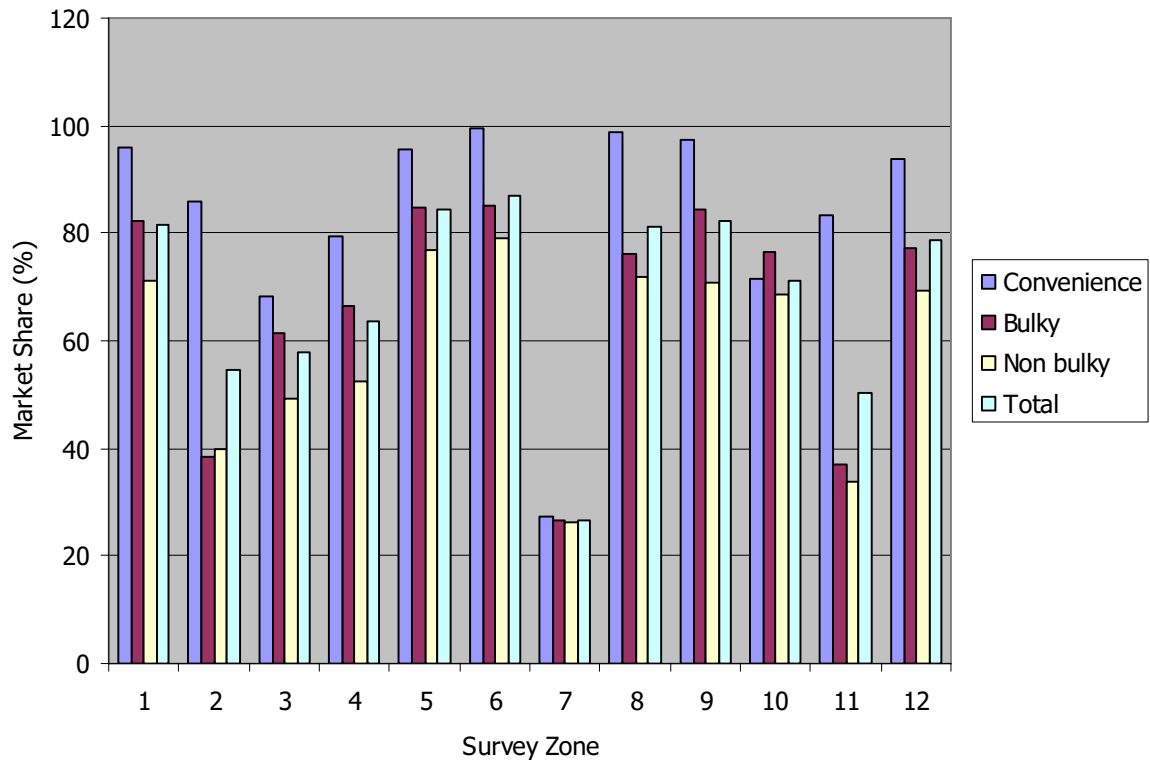
- 7.22 In terms of individual foodstores within the District, the out-of-centre Asda store at Thrumhall Lane in Halifax is the most popular store, achieving a convenience goods turnover of £53.2m. The second and third most popular stores are the Tesco at Haugh Shaw Road in Halifax (£41.6m) and the Tesco at Bradford Road in Brighouse (£38.5m). Other notable destinations with turnovers in excess of £10m include the Morrisons at Keighley Road (£17.6m); Sainsbury's at Wade Street (£25.7m); Morrisons in Todmorden (£14.1m); and the Tesco in Sowerby Bridge (£15.0m).
- 7.23 Popular stores outside the District include the Asda at Fixby in Huddersfield (Kirklees Council area), which is identified to achieve a turnover from residents within the defined Study Area of almost £11m, and the Morrisons store at Mayo Avenue in Bradford, which attracts £12m of convenience goods expenditure generated in the Study Area.
- 7.24 Collectively, the identified 'bulky goods' sector is identified to achieve a market share of 62.4% (or £124.7m) in 2009, reflecting the high level of retail warehousing in the District. Again, the market shares within each zone differ with the highest level of retention in Zone 6 where more than 85% of 'bulky goods' expenditure generated by residents within this zone is retained by facilities in the District. Other high retaining Zones include Zones 1, 5 and 9, with 82%, 85% and 84% respectively. The lowest levels of 'bulky goods' retention is identified to be in Zone 7, with only 27% of 'bulky goods' expenditure in this zone being attracted to facilities in the District.
- 7.25 In respect of non-bulky comparison goods expenditure, existing facilities attract 56.1% (or £283.0m) of expenditure generated in the Study Area in 2009, which is lower than the market share achieved for 'bulky goods' (62.4%). Within the broad category of non-bulky goods, facilities in the District are identified to attract 76% of expenditure generated in the chemist goods sector within the Study Area, compared to only 49% for books, CD's, DVD's etc. However, this lower market share is reflective of the popularity of the internet for purchasing such goods. The results identify that facilities in the District attract 49% of clothing and footwear goods expenditure within the Study Area and 52% for small household goods expenditure.
- 7.26 The highest level of retention of facilities within the District for Clothing and Footwear is identified to be within the Zones 8 to 10 where between 67% and 71% of expenditure generated is retained by facilities in the District. However, in terms of Small Household Goods, the highest market shares



were identified within the Zones 5 and Zone 6 at 80% and 79% respectively. The lowest retention level achieved by facilities in the District is within Zones 7 (32%) and Zone 11 (33%).

- 7.27 In terms of all comparison goods expenditure in the Study Area, existing facilities in the District retain 58% of comparison goods expenditure. This equates to £407.6m of comparison goods expenditure in 2009.
- 7.28 Overall, facilities in the District retain 65% of all expenditure generated in the Study Area (both convenience and comparison goods). This equates to £696.2m of expenditure, comprising £288.6m of convenience goods expenditure and £407.6m of comparison goods expenditure.
- 7.29 Figure 7.1 highlights that the greatest retention levels for all expenditure categories are relatively high with the exception of Zone 7, which extends beyond the local authority area towards Bradford and Leeds. Given the proximity of residents within this zone to competing provision, it is not surprising that the market share achieved by all facilities within District from this zone is notably lower than other zones within the Study Area.

Figure 7.1: Comparative Market Shares by Zone



Source: Calderdale Household Shopping Survey (2008)

7.30 Based on the findings of the Household Survey it is possible to estimate the catchment population of existing centres within the District for convenience and comparison goods shopping (Table 7.6).

Table 7.6: Catchment Areas of Goods Types - 2009

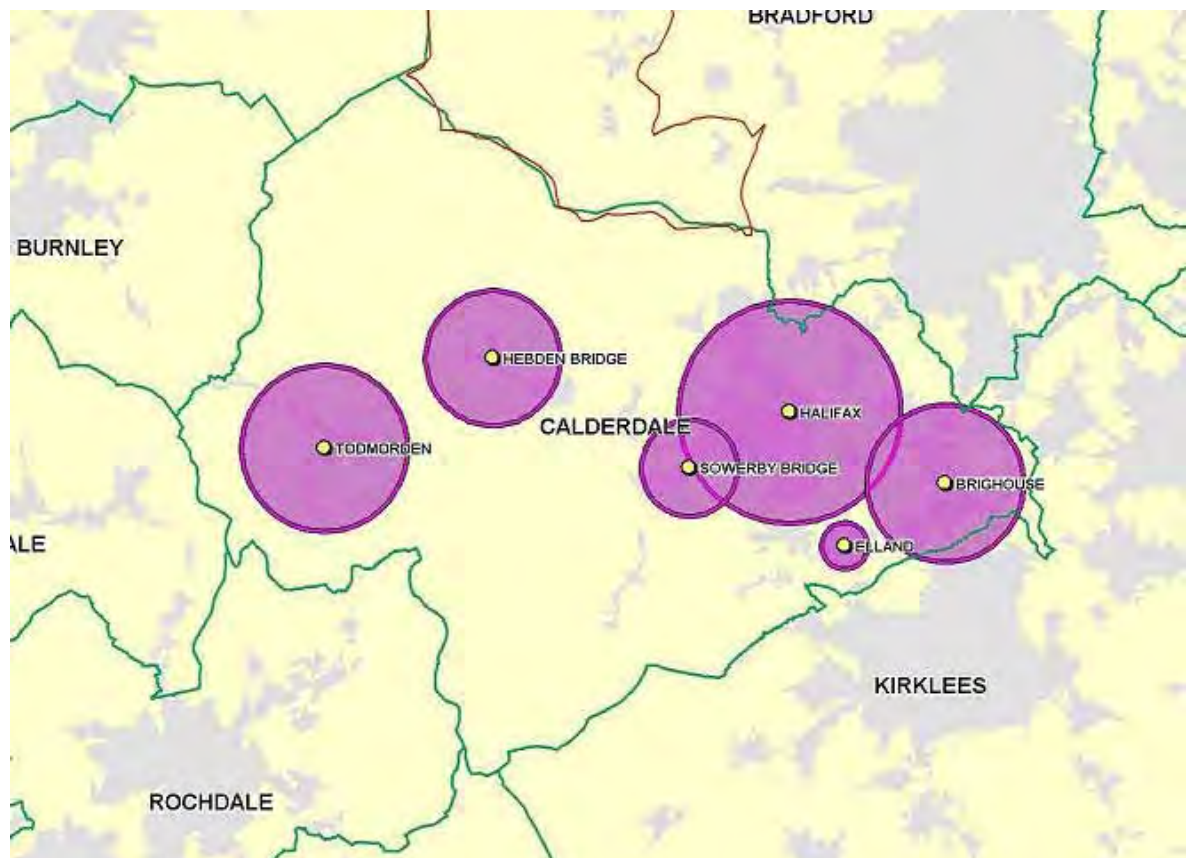
	Convenience [^]	Comparison	Urban Area
Halifax	77,080	107,302	82,056
Eland	3,371	2,119	6,477
Todmorden	13,553	3,637	8,207
Brighouse	34,260	10,775	9,969
Hebden Bridge	3,934	4,212	4,121
Sowerby Bridge	13,188	1,225	6,411
Total	145,386	129,270	149,957

Notes: [^]Main food shopping only
Includes edge-of-centre and out-of-centre facilities

7.31 As illustrated at Table 7.6, facilities in and around Halifax (including Tesco, King Cross and Asda at Thurmhall Lane) have the largest main food shopping catchment at approximately 77,080 people. This catchment population is reflective of the urban area population of Halifax (ONS (2001) 82,056 people). Facilities in other centres such as Brighouse (34,260 people) and Todmorden (13,553

people) are also identified to achieve relatively strong catchments for convenience goods shopping as illustrated by Figure 7.2.

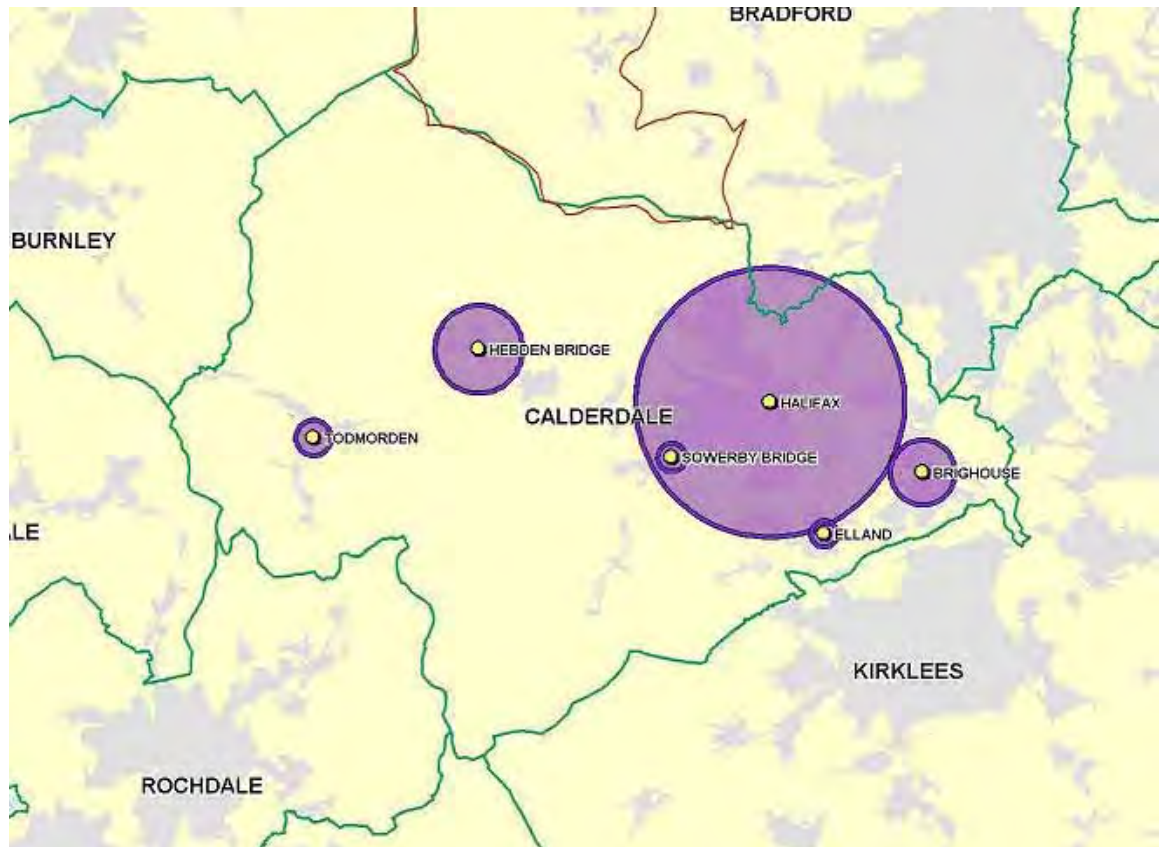
Figure 7.2: Size of the Catchment Population of Existing Centres - Convenience Goods Shopping



Notes: This is based on the market share of all convenience goods facilities within each centre (based on the findings of the Household Survey). The larger the circle the greater the catchment population that centre achieves.

7.32 With regard to comparison goods, Figure 7.3 illustrates that that facilities in Halifax have a much greater influence on shopping patterns within the Study Area than other centres in the District. This is to be expected given the scale of the retail offer in Halifax when compared to smaller centres elsewhere, such as Brighouse and Todmorden.

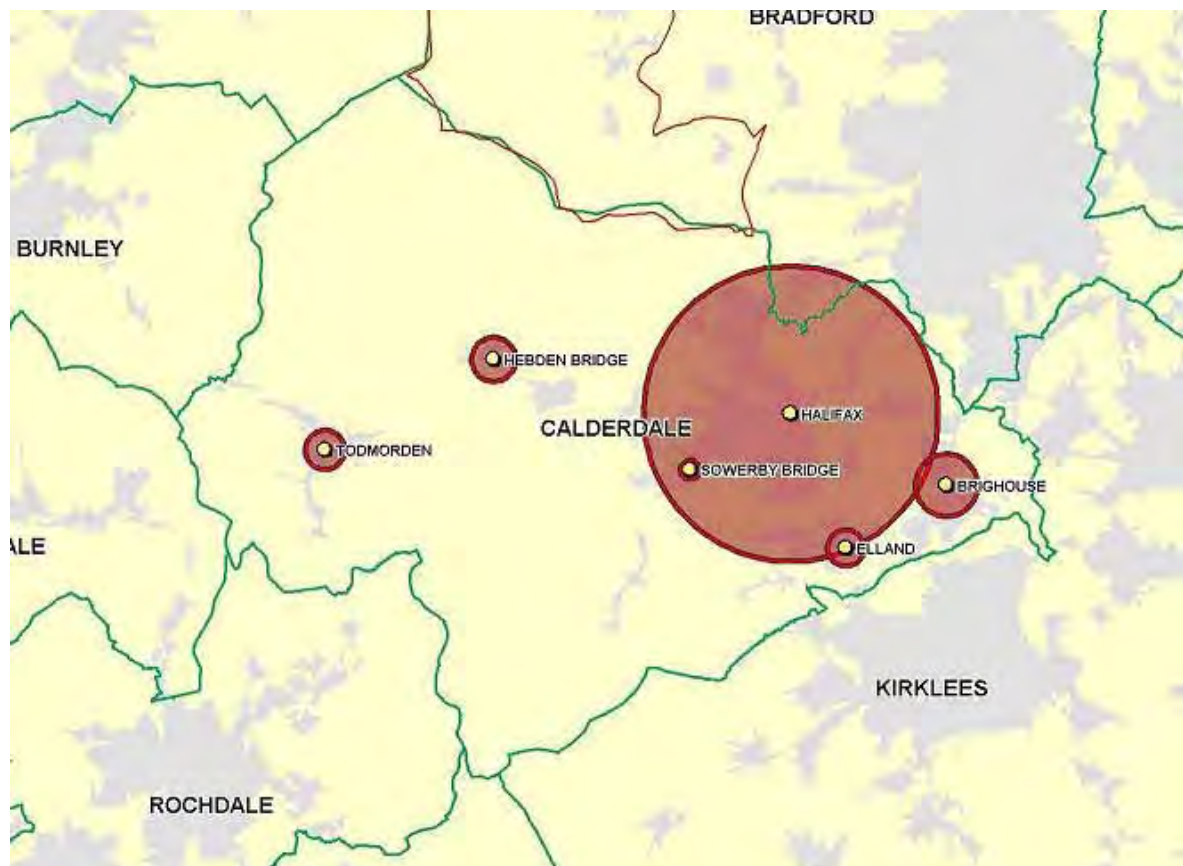
Figure 7.3: Size of the Catchment Population of Existing Centres - Comparison Goods Shopping



Notes: This is based on the market share of all comparison goods facilities within each centre (based on the findings of the Household Survey). The larger the circle the greater the catchment population that centre achieves.

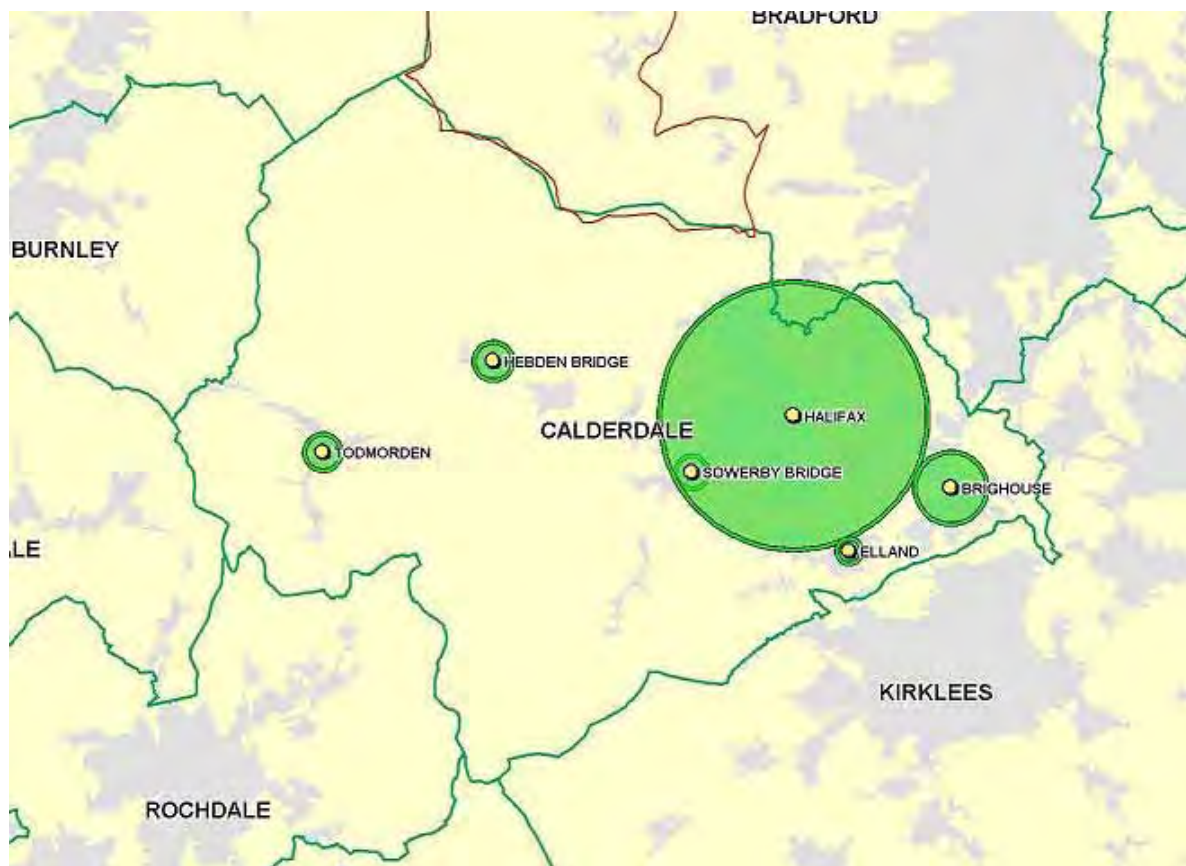
7.33 With regard to bulky comparison goods (e.g. DIY Goods, furniture, etc.) the household survey results suggest that the primary catchment area for the District’s bulky comparison goods facilities comprises zones 1, 3, 4, 5, 6, 8, 9, 10, and 12. Again, facilities in Halifax are identified to have the biggest influence on shopping patterns (Figure 7.4). As would be expected, the influence of smaller centres within the District, such as Hebden Bridge and Brighouse, is identified to be significantly less.

Figure 7.4: Size of the Catchment Population of Existing Centres – Bulky Comparison Goods Shopping



7.34 In respect of non-bulky comparison goods shopping (e.g. clothing and footwear) it is evident that the primary catchment area for all facilities within the District differs slightly to that identified for bulky goods. Our assessment identifies the District’s catchment to focus on zones 1, 4, 5, 6, 8, 9, 10 and 12 of the defined Study Area.

Figure 7.5: Size of the Catchment Population of Existing Centres – Non Bulky Comparison Goods Shopping



Forecast Growth in Expenditure Attracted to Calderdale

- 7.35 With forecast growth in convenience shopping predicted to increase over the period 2009 to 2026 (despite a slight fall between 2009 and 2012), it is estimated that Calderdale will experience an increase in convenience goods expenditure within the District of some £66.5m between 2009 and 2026 at current market shares (Table 7.7).
- 7.36 In contrast, the significant increase identified in expenditure on comparison goods would suggest that Calderdale’s market share would capture a further £442.8m between 2009 and 2026 (Table 7.7), which would be available for all new comparison retail facilities in the future. This is based on ‘rolling forward’ the current market shares for each category of goods (both convenience and comparison) within the Study Area. This assessment takes into account both population change and growth in retail expenditure.



Table 7.7: Expenditure Available to Retail Facilities in Calderdale

	Market Share (%)	Expenditure Available to Calderdale- £m			
		2009	2014	2019	2026
Convenience Goods					
<i>Main</i>	78.1	216.7	226.6	242.5	266.7
<i>Top-up</i>	77.7	71.8	75.1	80.4	88.4
Total Convenience	78.0	288.6	301.7	323.0	355.1
Comparison Goods					
<i>Furniture</i>	58.3	43.0	49.0	63.0	89.8
<i>DIY</i>	70.5	35.6	40.4	52.1	74.1
<i>Electrical</i>	61.0	46.1	52.4	67.4	96.1
Total Bulky Goods	62.4	124.7	141.8	182.5	260.0
<i>Clothing & Footwear</i>	48.9	86.8	98.7	127.0	180.9
<i>Small H'Hold Goods</i>	53.4	40.3	45.8	59.0	84.1
<i>Books, CD's, DVD's</i>	48.4	19.6	22.3	28.7	40.9
<i>Recreation</i>	57.0	71.6	81.6	105.0	149.6
<i>Chemist</i>	76.0	64.6	73.5	94.7	134.9
Total Non Bulky Goods	56.1	282.9	321.9	414.4	590.4
All Comparison Goods	57.9	407.6	463.7	596.9	850.4
ALL GOODS	64.8	696.2	765.4	919.9	1,205.5

Source: Calderdale Household Shopping Survey (2008) and WYG (2009)

7.37 In addition to the above market share analysis, WYG has examined the level of inflow from the results of the On Street Surveys. WYG found that this varied upon each centre for both types of goods (food or non-food). Table 7.8 below sets out the inflow estimates for each of the main identified town centres.

Table 7.8: Inflow from Outside Study Area

Centre	Convenience	Comparison
Halifax Town Centre	10.9%	10.9%
Brighouse Town Centre	8%	5%
Elland Town Centre	0%	2.9%
Hebden Bridge Town Centre	5.9%	2.0%
Sowerby Bridge Town Centre	1.0%	0%
Todmorden Town Centre	4.0%	2.0%
Total	5.8%	4.8%

Source: NEMS and WYG analysis

7.38 From the results of the on-street survey it is evident that there was convenience goods expenditure inflow of 5.8% from outside the Study Area (household survey area). As set out above the highest levels of convenience goods inflow was in Halifax and Brighouse Town Centres. From analysis of the results we found that there was limited (0.1%) inflow for bulky goods retailing. There was 4.7% inflow of non-bulky goods. Therefore we have not included any inflow for bulky goods.



7.39 Based on the findings of the on-street survey and the expenditure derived from the household survey, WYG estimate that the level of convenience goods expenditure flowing into Calderdale is £14.5m. In contrast, WYG estimate that the level of comparison goods expenditure from outside the study area is £14.6m. WYG estimate that the majority (54%) of this expenditure is spent at facilities in Halifax.

7.40 However, given WYG’s wider involvement and awareness in a number of adjacent retail studies produced by adjoining local planning authorities (Bradford City Council, Kirklees and Rochdale), we have reviewed the level of inflow to Calderdale in both convenience and comparison goods expenditure. Table 7.9 below shows the level of convenience goods expenditure spent at facilities in Calderdale but from outside the defined study area.

Table 7.9: Convenience Goods Inflow from Adjacent Local Planning Authorities

Destination	Bradford Retail Study (2008) (£m) [1]	Kirklees Retail Study (2008) (£m) [2]	Rochdale Retail Study (2005) (£m) [3]	Total
Tesco, Huddersfield Road, Brighouse	2.7			2.7
Sainsbury’s Wade Street	4.8			4.8
Asda, Thrumhall Lane	2.6			2.6
Morrison, Keighley Road, Illingworth	0.4			0.4
Tesco Market Street	0.6			
Local Shops, Halifax	0.5		1.7	2.2
Marks & Spencer, Woolshops	0.6	0.1		0.7
Hebden Bridge	0.2	0.1		0.3
Morrisons, Todmorden		1.4		1.4
Elland			0.5	0.5
Total	12.4	1.6	2.2	16.2

Note:

[1] Bradford Retail Study (2008), prepared by White Young Green, but excludes Survey Zones 9 and 10 (converted to 2006 Prices)
 [2] Kirklees Retail Study (2008), prepared by Signet Planning, but excludes Survey Zones 12, 13 and 14 (adjusted to 2006 prices)
 [3] Rochdale Retail Study (2005) prepared by White Young Green, but excludes Survey Zone 8 (adjusted to 2006 prices)

7.41 The results show that the inflow of convenience goods expenditure from the adjacent study areas to facilities in Calderdale is approximately £16.2m (at 2006 prices). This is a considerable level of convenience goods expenditure that will need to be considered as part of any future capacity exercise. The level of identified inflow represents an additional 6% of that expenditure derived from Calderdale’s Study Area that is attracted to facilities in the district. This is slightly lower than that identified from the results of the On Street Survey.



7.42 Table 7.10 below shows the level of comparison goods expenditure at facilities in Calderdale but from outside the defined study area.

Table 7.10: Comparison Goods Inflow from Adjoining Local Planning Authorities

Destination	Bradford Retail Study (2008) (£m) [1]	Kirklees Retail Study (2008) (£m) [2]	Rochdale Retail Study (£m) [3]	Total
Halifax	27.4	3.1	0.4	31.6
Charles Town Road Retail Park, Halifax	0.7			0.7
Greenmount Retail Park	0.4			0.4
Sainsbury's, Halifax	0.4			0.4
Haugh Shaw Road Retail Park, Halifax	0.1			0.1
Morrison's, Keighley Road, Illingworth	0.2			0.2
Asda, Thurm Hall Lane,	0.9			0.9
Crossley Retail Park,	0.6			0.6
Brighouse	0.4	1.4		1.8
Eland Town Centre	0.0	4.1		4.1
Hebden Bridge	0.6		2.0	2.6
Todmorden	0.0		10.0	10.0
Hipperholme	0.0			0.0
Pellon Lane, Halifax	2.7			2.7
Mytholmroyd	0.1			0.1
Shelf	0.3			0.3
Walsden			0.3	0.3
Total	34.8	8.6	12.7	56.8

Note:

- [1] Bradford Retail Study (2008), prepared by White Young Green, but excludes Survey Zones 9 and 10 (adjusted to 2006 Prices)
- [2] Kirklees Retail Study (2008), prepared by Signet Planning, but excludes Survey Zones 12, 13 and 14 (adjusted to 2006 prices)
- [3] Rochdale Retail Study (2005) prepared by White Young Green, but excludes Survey Zone 8 (adjusted to 2006 prices)

7.43 The results show that the inflow of comparison goods expenditure from the adjacent study areas to facilities in Calderdale is approximately £56.8m in 2009. This is a considerable level of comparison goods expenditure that will need to be considered as part of any future capacity exercise. The level of identified inflow represents 14% of that expenditure derived (£407.6m) generated within the defined Study Area that is attracted to facilities in the district. The inflow represents 8% of the available comparison goods expenditure (£704m) generated within the Study Area. This is higher than that identified from the results of the On Street Survey.

7.44 In order for Calderdale and its established town centres to capture the significant growth in comparison goods expenditure it is likely that there will be a need to enhance future retail provision, thereby ensuring that this growth is not lost to competing centres and that the District's future market share does not decline.



7.45 However, if an excess of comparison/convenience goods expenditure manifests itself within the Study Area, this does not translate directly into a requirement for additional floorspace. It will be necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns (including e-commerce);
- The current capacity and efficiency of retail floorspace within the established centres; and
- Future changes in business productivity and current development commitments.



8.0 RETAIL CAPACITY AND THE ROLE OF EXISTING CENTRES

Introduction

8.01 The modelling for the capacity assessment has been undertaken for two different categories of expenditure. Typically these categories reflect the difference in patterns for convenience shopping and comparison shopping. This approach is advocated in PPS6, which states at paragraph 2.34 that:

'In assessing quantitative need for additional development when preparing its development plan documents, a local planning authority should assess the likely future demand for additional retail and leisure floorspace, having regard to a realistic assessment of:

- **Existing and forecast population levels;**
- **Forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods and for the main leisure sectors; and**
- **Forecast improvements in productivity in the use of floorspace.'** (Our emphasis).

8.02 For the purposes of this capacity exercise WYG has primarily examined the need for new convenience and comparison floorspace. Indicative capacity assessments are provided for 2014 together with 2019 and 2026, but any assessment in the long-term should be viewed with caution. Any need or capacity identified beyond 2014 is not justification for new retail floorspace outside of existing centres. This could prejudice more central sites coming forward that, although not available for retail development at present, may become available between now and 2014 or after 2014.

Capacity Formula

8.03 For all types of capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) – allowing for population change and retail growth – *less* Turnover (£m) – allowing for improved 'productivity' – *equals* Surplus/Deficit (£m).

Expenditure (£m) – the expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The formula is subject to a



number of factors, which need to be considered to help provide the most accurate figure for that particular local catchment. These include:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. catalogue shopping/internet).

Turnover (£m) – the turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Retail Rankings and Verdict Grocery Retailers – independent analysis which lists the sales density for all major retail multiples.

Surplus/Deficit (£m) – this represents the difference between the expenditure and turnover figures outlined above. Clearly, a surplus figure will represent an ‘under provision’ of retail facilities within the Study Area (which all things being equal would suggest that additional floorspace is required), whereas a deficit would represent an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).

- 8.04 Although a surplus figure is generated in £m, it is possible to convert this figure into an indication of aggregate floorspace. The level of floorspace will vary dependent on the type of retail/goods sold. Indeed, electrical retailers such as Curry’s (which are considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as Carpetright and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Calderdale District

- 8.05 Based on the current market shares of all existing facilities within the District, which includes town centres, district centres, local centres, freestanding stores etc. our analysis indicates that existing facilities in the District have a convenience goods turnover of some £288.6m in 2008. This equates to a market share of **78.0%**. In addition, and from our review of the Bradford Retail Study (2008), the Kirklees Retail Study (2008), and the Rochdale Retail Study (2005), WYG’s assessment identifies that some £16.2m of additional convenience goods expenditure is attracted to facilities in Calderdale (excluding any zones that overlap with the Study Area identified for this study). The



identified inflow from Bradford, Kirklees and Rochdale represents 5.6% of the derived turnover from the Study Area that is spent at facilities within the district.

8.06 WYG has estimated the 'benchmark' turnover of existing facilities in Calderdale based on a number of national published trading information. WYG estimate that all facilities achieve a benchmark (or expected) convenience goods turnover of £224.0m in 2009.

8.07 Table 8.1 below indicates the current trading position compared against the 'benchmark' turnover of retail facilities in Calderdale based on average sales densities, and projects this forward to 2026 at a constant market share and including inflow from neighbouring Bradford, Kirklees and Rochdale local authority areas.

Table 8.1: Estimated 'Capacity' for Convenience Goods Facilities

Year	Turnover - £m ^{1^}	Expenditure Available - £m ^{2^}	Surplus Expenditure - £m
2009	224.0	304.7	80.7
2014	229.7	318.6	88.9
2019	235.5	341.1	105.6
2026	243.8	375.1	131.3

Notes: ¹ Allows for increased turnover efficiency of +0.5% per annum
² Assumes constant market share at 78.0% in the Study Area and constant inflow at 5.6%
[^] Assumes that 'other local parades' are trading in equilibrium
 At 2006 prices

8.08 Table 8.1 indicates that once inflow has been taken in to account the convenience goods facilities in Calderdale appear to be overtrading by approximately £80.7m in 2009 primarily due to the overtrading of existing facilities in the Halifax area. This overtrading is set to increase to £88.9m by 2014 and to £131.3m by 2026. Consequently, there appears to be an immediate capacity (i.e. 2009) within Calderdale as a whole for additional convenience goods floorspace of between 6,740 sq m (net) and 16,140 sq m (net)⁸, dependent upon the end operator and type of development. Assuming that the market share of existing facilities within the District remains the same, this capacity for additional convenience goods floorspace within the District could increase to between 10,075 sq m (net) and 24,125 sq m (net) by 2026.

8.09 With regard to comparison goods capacity, our analysis identifies that in 2009 existing facilities within Calderdale have a comparison goods turnover of approximately £407.6m. This equates to a

⁸ Average sales density assumed to be between £5,000/sq m and £11,972/sq m (based on the average sales density of discount retailers such as Aldi and the leading four supermarkets as identified by Verdict 2009). Allows for increases in turnover efficiency of +0.5% per annum



market share of **57.9%**. In addition, the district benefits from some £56.8m (or 13.9%) derived from inflow. Table 8.2 estimates the likely expenditure that will be available for new comparison goods floorspace within Calderdale by 2026 at current market share.

Table 8.2: Estimated Available Comparison Goods Expenditure

Year	Turnover + Increased Productivity - £m	Expenditure Available - £m	Surplus Expenditure - £m
2009	464.4	464.4	-
2014	500.3	528.1	27.8
2019	539.0	680.0	141.0
2026	598.1	968.5	370.4

Notes: Allows for increased 'productivity' of +1.5% per annum and assumes constant market share at 57.9% in Study Area and inflow at 13.9%.

- 8.10 Based on its current market share, Calderdale District is identified to have a capacity for almost £28m of additional comparison goods expenditure that is available for new retail floorspace by 2014. By 2019, this capacity will increase to £141m and to more than £370m by 2026 (assuming constant market share and inflow). However, WYG believes that there is the possibility that the level of inflow is likely to decrease significantly over the plan period in light of planned development (i.e. Bradford City Centre and Huddersfield Town Centre expansions).
- 8.11 By assuming an average comparison goods sales density of £5,000/sq m and applying a constant market share and taking into account forecast increases in floorspace efficiency (at +1.5% per annum), this additional expenditure could accommodate up to 5,160 sq m (net) of comparison floorspace by 2014 and up to 57,515 sq m (net) by 2026 - although this is dependent on the end operator.

Existing Town Centres

- 8.12 Whilst the previous section of this Study identifies the market share of all facilities within Calderdale as a whole, it is important to assess the current role of the main centres in the District.
- 8.13 The RSS (2008) identifies Halifax as a Sub Regional Town Centre, whilst Brighouse is identified as a Principal Town Centre. The RSS identifies the sub regional centre of Halifax to be the primary focus for new shopping development and investment. The RSS does not recognise Elland, Sowerby Bridge, Todmorden and Hebden Bridge in the regional retail hierarchy. In accordance with PPS6, which advocates that new retail floorspace should be accommodated within defined town centres in



the first instance, set out below is WYG's assessment of the role of these six Town Centres together with the potential for additional retail floorspace within each.

Halifax Town Centre (Zone 1)

Overview

- 8.14 Halifax Town Centre is located 27 km to the south west of Leeds and 13 km to the north of Huddersfield. Retailing is primarily focused on a number of key pedestrianised streets, including Cheapside, Cornmarket, Crown Street, Russell Street, Southgate and Woolshops. In addition to the town centre's retail offer, Halifax contains a number of retail parks on the edge of the centre, including Halifax Retail Park, Crossley Retail Park, Greenmount Retail Park and Charles Town Retail Park as well as a number of solus retail warehouse units.
- 8.15 In terms of the hierarchy of town centres set out in the Regional Spatial Strategy, Halifax is identified as the most important centre and is considered a sub regional centre. In floorspace terms (as identified by Experian Goad) Halifax Town Centre (central shopping area) is identified as having approximately 53,690 sq m of retail (convenience and comparison) floorspace. This places the Town Centre first in the District, in terms of the amount of floorspace that it contains (according to Goad).

Convenience Goods Shopping

- 8.16 In order to ascertain the likely need for additional convenience goods floorspace within Halifax, it is important to understand the true nature of existing supply. As highlighted in the retail 'health check' of Halifax (contained at [Appendix 5](#)), the town centre contains a modest range of convenience retailers, with the proportion of floorspace and the proportion of units in this sector in line with the national average.
- 8.17 In addition to Halifax Town Centre, within Zone 1 there are also two local centres, King Cross and Queens Road. Both centres have a modest level of convenience floorspace. However, both are anchored by significant foodstores. In King Cross there is a large Tesco supermarket and just over 300 metres to the west of Queens Road is a large Asda store on Thrumhall Lane. In addition to these two supermarkets is the Aldi at Crossley Retail Park.



- 8.18 Convenience retailers in Halifax town centre include a Tesco store on Market Street and a number of smaller convenience stores and the market. The Household Survey identifies that facilities within Halifax Town Centre only retain 6% of convenience goods expenditure generated in the Study Area. Overall, existing facilities in Halifax Town Centre are identified to achieve a convenience goods turnover of some £22.6m. Also there is £3.2m of convenience expenditure being spent in Halifax from outside the defined study area.
- 8.19 However, it should be noted that there is a large Sainsbury's store at Wade Street to the north of the Town Centre. This store is located inside the defined town centre but is considered out-of-centre by PPS6 definition (over 300 sq. m from primary shopping frontage). WYG found that the store attracted £24.4m of convenience expenditure from within the study area and £4.8m from outside the study area.
- 8.20 In terms of the individual foodstores within and around Halifax Town Centre, the Household Survey results suggest that the Asda store at Trumhall is the most popular store attracting £53.2m of convenience goods expenditure generated within the Study Area and a further £2.6m from outside the study area. The second most popular store was the Tesco store at Haugh Shaw Road, which attracted £41.6m from the whole study area.
- 8.21 These three stores alone account for approximately 84% of convenience goods expenditure directed towards facilities in and around Halifax Town Centre (Zone 1). The results underline the dominance of these three stores in relation to convenience goods shopping patterns in the Halifax central area. Furthermore, the findings of the Household Survey indicate that all facilities in Halifax Town Centre (excluding Sainsbury's) achieve a convenience shopping catchment of just 6%. However, when the out-of-centre provision is included this increases to more than 38% and has a main food shopping catchment of 77,080 people within the Study Area. This is the largest convenience catchment of the six town centres. Plans indicating the extent of Halifax's shopping catchment are contained at [Appendix 8](#).
- 8.22 In terms of capacity for additional convenience goods floorspace within and close to Halifax Town Centre, Table 8.3 provides a breakdown of the trading performance of existing foodstores in Halifax (Zone 1). The trading performance of existing foodstores is based on the survey derived turnover



(based on the findings of the Household Survey) and the anticipated 'benchmark' turnover/or expected turnover (based on national published trading information from Mintel and Verdict).

Table 8.3: Trading Performance of Current Foodstores in Halifax (Zone 1)

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate** – £m
Halifax Town Centre						
Local Shops, Halifax	2,080	1,664	1,664	3,500	5.8	9.6
Borough Market,	6,530	5,224	2,612	700	1.8	2.3
M&S, Woolshops	700	560	560	10,697	6.0	3.1
Tesco Market St	1,240	992	662	12,145	8.0	11.2
King Cross	1,087	869	869	2,000	1.7	0.7
Sub Total	11,637	9,309	6,367		23.3	26.9
Out of Centre						
Sainsbury's, Wade St	4,487	3,258	2,473	9,276	22.9	29.2
Aldi, Crossley Retail Park	1,283	898	701	3,736	2.6	3.1
Tesco, Aachen Way	5,376	3,226	2,151	12,145	26.1	41.6
Asda, Thrumhall Lane	6,716	3,902	2,212	14,834	32.8	55.8
Sub Total	17,862	11,284	7,537		84.4	129.7
TOTAL	29,499	20,593	13,904		107.7	156.6

- Notes:
- ¹ - Gross and net Floorspace Derived from Experian Goad or IGD where known (Asda and Sainsburys)
 - ² - Gross to net split for existing local shops based on 80/20, for Aldi based on 70/30 and for Tesco 60/40.
 - ³ - Net Convenience floorspace based on information provided by Verdict (2009) for Tesco, Sainsburys and Marks and Spencer and WYG judgement for local shops/markets
 - ⁴ - Sales density derived from Verdict (2009) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops/markets
 - * Assumed that 25% of Marks and Spencer store is allocated to food sales.
 - At 2006 prices
 - ** Includes inflow from outside the defined study area.

8.23 By comparing the estimated total turnover generated by existing retail facilities based on anticipated 'benchmark' turnover (£107.7m), there would appear to be an undersupply of convenience goods floorspace within Halifax (central). Indeed, our analysis of the performance of the main convenience destination in Halifax, with the exception of the Marks & Spencer in and around the defined town centre, all the other stores are trading significantly above anticipated 'benchmark' turnover with a survey derived turnover of £156.6m compared to a benchmark turnover of £107.7m in 2009.

8.24 However, it must be noted that the results of shopper surveys should only be used with caution to estimate turnovers of individual stores (rather than their comparative market shares).

8.25 WYG identifies that the Tesco store at King Cross was over trading by 59% compared to benchmark turnover. Other stores within Halifax are identified to be overtrading, including the Asda store at Trumhall Lane by £23.0m (or 70%) and the Sainsbury's store by some £6.3m (or 28%). Local shops (including market) in Halifax recorded a turnover of £11.9m based on the



Household Survey results, which compares to a benchmark turnover of £7.6m suggesting that local shops in Halifax are performing well and are currently trading above expected levels.

8.26 In terms of capacity for additional convenience goods floorspace within Calderdale, Table 8.4 provides a breakdown of the capacity for additional convenience goods floorspace in monetary terms. Table 8.5 provides indicative floorspace requirements based on the capacity being accommodated by a modern large-format retailer (e.g. Sainsburys, Asda, etc) and that based on smaller format retailers (e.g. Aldi, Somerfield, etc.).

Table 8.4: Estimated 'Capacity' for Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	107.7	156.6	48.9
2014	110.4	170.5	60.1
2019	113.2	182.5	69.3
2026	117.2	200.7	83.5

Notes: ¹ - Allows for increased turnover efficiency of +0.5% per annum
² - Assumes constant market share at 41.0% within the Study Area and assuming constant 'inflow' (7.5% of expenditure retained by facilities in Halifax)
 At 2006 prices

Table 8.5: Quantitative Need for Additional Floorspace in Halifax (Zone 1)

Year	Convenience Goods		
	£m	Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	48.9	4,085	9,780
2014	60.1	4,895	11,725
2019	69.3	5,505	13,185
2026	83.5	6,410	15,340

Notes: ¹ - Average sales density assumed to be £11,972/sq m (based on the average sales density of the leading large-format supermarkets as identified by Verdict 2009)
² - Average sales density assumed to be £5,000/sq m
 * - Allows for increases in turnover efficiency of +0.5% per annum
 At 2006 Prices

8.27 Having regard to the identified oversupply of convenience goods expenditure, at current market share there is a capacity for additional convenience goods floorspace of between 4,085 sq. m (net) and 9,780 sq. m (net) in 2009 within Halifax. This is forecast to increase to a potential floorspace requirement of between 6,410 sq. m (net) and 15,340 sq. m (net) by 2026 – assuming constant market share and maintaining current levels of inflow.

Commitments

8.28 In terms of outstanding commitments, two applications exist for mixed use development at Broad Street (LPA Ref: 08/00668/FUL) and Shaw Lodge Mills (LPA Ref: 07/02146/OUT), which includes 1,123 sq m (gross) and 1,106 sq m (gross) respectively of new retail floorspace. Although it is not



clear who the end occupiers of this floorspace are, based on WYG's experience of similar schemes elsewhere, for the purposes of this assessment we have assumed that up to 50% of the new retail floorspace could be occupied by convenience goods retailers.

- 8.29 On this basis, although again dependent upon the end operators by applying an average sales density of £5,000 per sq m in 2009⁹ and assuming a gross to net split of 70%/30%, these commitments are identified to have a convenience goods turnover of £2.01m and £1.98m respectively in 2014, increasing to £2.10m and £2.07m by 2026. Collectively, these commitments are identified to meet less than 7% of the identified convenience goods capacity in 2014 and only 5% of the identified capacity by 2026.
- 8.30 In addition, nearby (approximately two miles from Halifax Town Centre) within Zone 10 of the defined Study Area, planning permission exists (LPA Ref: 08/00672/FUL) for the demolition and replacement of the existing Morrisons supermarket. The replacement store results in an uplift in floorspace of some 667 sq m (gross). By assuming that 65% of this gross floorspace comprises the net sales area and 80% is for the sale of convenience goods, the replacement store is identified to result in a further convenience goods turnover of £3.7m in 2009. This improvement in the retail offer of the Morrisons store at Illingworth is likely to have some impact on the strong trading performance identified at facilities elsewhere in the District, including stores near Halifax. Indeed, within Zone 10 of the defined Study Area, the existing Asda store at Thrumhall Lane is identified to be the second most popular single destination for local residents within this zone (behind the existing Morrisons store) and any improvement in offer locally may reduce the number of shopping trips directed elsewhere. However, as the Morrisons proposal replaces an existing store, the impact on existing shopping patterns is likely to be less than would be identified if a new retailer not represented in the area was to be introduced.

Qualitative Need – Convenience Goods

- 8.31 As previously highlighted, the Household Survey suggests that most households undertake two kinds of food shopping trips (i.e. main food shopping and 'top-up' food shopping).
- 8.32 Whilst facilities in Halifax Town Centre (excluding Sainsbury, Tesco (Aachen Way) and Asda) retain approximately 6% of convenience goods expenditure generated in the Study Area, WYG found that

⁹ Allows for increased productivity at +0.5% per annum between 2009 and 2026



within Survey Zone 1, existing facilities in the survey zone retain 93% of main food expenditure and 99% of top up expenditure. This suggests that local needs are met within the immediate area and that there may be limited opportunity to increase market share within Zone 1. There would appear to be limited opportunity to increase or enhance market share within Zone 1. Notwithstanding this, the majority of these trips are to the three main superstores.

- 8.33 PPS6 indicates that the degree to which shops are overtrading should be taken into consideration when determining the qualitative need for new convenience floorspace. The Tesco, Sainsbury's and Asda stores around Halifax are all overtrading and this in itself could indicate a qualitative need for additional convenience floorspace. Similarly, other more central operators (with the exception of Marks & Spencer) are also identified to be performing above expected levels. Furthermore, PPS6 stipulates that Local Planning Authorities should ensure that an appropriate distribution of locations is achieved in town centres and that a range of shopping services is provided which allows genuine choice to be made by local residents. Consequently, there is a clear case to be made for an additional superstore in the Town Centre which would increase the convenience goods offer for local residents (particularly for main food shopping), which is currently dominated by three operators.

Comparison Goods Shopping

- 8.34 As highlighted at **Appendix 5**, Halifax Town Centre is the largest centre in Calderdale for comparison goods retailers. Notwithstanding this, both the proportion of units and the proportion of floorspace within the comparison goods sector are below the national average.
- 8.35 Analysis of the Household Survey identifies that the current (2009) level of trade passing through existing facilities in Halifax Town Centre is estimated to be £278.3m. This represents **39.5%** from the Study Area. From examination of the survey evidence, 62% of the total comparison goods expenditure generated within the Zone 1 was retained by facilities in Halifax Town Centre. High retention rates were also found in Zone 5 (67%) and Zone 6 (67%). In addition to the facilities in the town centre, there are a number of retail parks surrounding Halifax town centre, these include Halifax Retail Park; Charles Town Road Retail Park; Greenmount Retail Park and Crossley Retail Park, in addition to a number of freestanding solus units including the Matalan and Wickes. Together these have a combined retention of 6.4% (or £45.3m) of available comparison



expenditure. Accordingly, the overall turnover of all facilities within Halifax equates to £323.6m and a market share of 46.0%.

- 8.36 In addition, from analysis of the results of the adjacent Retail Studies, £34.7m of comparison goods expenditure was spent at facilities in Halifax in 2009. This represents 10.7% of the turnover retained at facilities in Halifax from within the study area (£323.6m).
- 8.37 By 'rolling forward' Halifax's combined market share (including retail parks and solus and comparison floorspace in supermarkets) it is possible to examine the likely comparison goods floorspace required in order to maintain its current market share (namely at a level of approximately 46.0% of all comparison goods expenditure within the defined Study Area and assuming constant inflow of 10.7% of expenditure attracted to all facilities in and around Halifax).
- 8.38 Table 8.6 below estimates the likely expenditure that will be available for new comparison goods floorspace by 2026 at current market share.

Table 8.6: Estimated Available Comparison Goods Expenditure

Year	Turnover + Increased Productivity - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	358.3	358.3	-
2014	386.0	407.8	21.8
2019	415.8	525.0	109.2
2026	461.5	747.8	286.3

Notes: ¹ - Allows for increased 'productivity' of +1.5% per annum
² - Assumes constant market share at 46.0% within the Study Area and inflow at 10.7% At 2006 prices.

- 8.39 Table 8.6 indicates that by 2014 there will be some £21.8m of comparison goods expenditure available for new retail development within Halifax Town Centre based on current market shares. This level of expenditure capacity is identified to increase to £109.2m by 2019 and to £286.3m by 2026. This amount of expenditure will be available for all comparison goods floorspace (both 'bulky' and 'non-bulky').
- 8.40 In floorspace terms (although dependent upon the end operator), by assuming an average comparison goods sales density of approximately £5,000/sq m (and allowing for increased productivity at +1.5% per annum), this equates to a potential floorspace requirement by 2014 for



approximately 4,050 sq m (net) of additional comparison goods floorspace (or 5,780 sq m gross¹⁰) within Halifax town centre. This gross floorspace would represent a 10% increase in the level of current comparison goods floorspace (40,000 sq m) within the town centre. This requirement is identified to increase significantly to 18,820 sq m (net) by 2019. This is forecast to increase to approximately 44,455 sq m (net) by 2026 just to maintain current market share. However, capacity estimates in the long-term should be treated with caution.

Commitments

- 8.41 From our review of the Council's retail floorspace monitoring report, as previously highlighted there are two outstanding commitments for mixed use development in Halifax (LPA Ref: 08/00668/FUL and 07/02146/OUT). These commitments are identified to comprise some 1,123 sq m (gross) and 1,106 sq m (gross) respectively of new retail floorspace. Although the potential end-operators are not known (together with the potential split of convenience and comparison goods retail floorspace), by applying an average sales density of £4,500 per sq m these commitments could achieve a comparison goods turnover of up to £4.4m and £4.3m respectively in 2014, increasing to up to £5.3m and £5.1m by 2026¹¹.
- 8.42 These outstanding commitments (assuming that the retail element comprises all comparison goods floorspace) could collectively achieve a comparison goods turnover of £8.6m in 2014, increasing to £10.3m by 2026. This potential turnover represents only almost 40% of the identified capacity (c. £22m) in Halifax by 2014. However, these commitments represent less than 5% of the identified capacity (c. £286m) by 2026.

Qualitative Need – Comparison Goods

- 8.43 Halifax Town Centre provides a reasonable range of 'non-bulky' comparison goods, reflected by the relatively strong market share achieved by existing facilities within Halifax. The Household Survey identifies that existing facilities (including retail warehousing) achieve a market share of approximately 47% of non-bulky goods expenditure generated by residents within the identified Study Area. The results found that 44% (or £221.2m) of expenditure was spent in facilities outside the District, most of which was spent at facilities in Kirklees (12% or £61.8m), including

¹⁰ Assumes net floorspace is 70% of the gross

* Excludes expenditure on Books, CDs and DVD.s

¹¹ Based on applying an average sales density of £4,500 per sq m in 2009 and allowing for increased productivity of +1.5% per annum. Also assumes a gross to net split of 80%/20%



Huddersfield Town Centre, Birstall Retail Park and Leeds Road Retail Park. Expenditure is also identified to be directed to facilities in Bradford (7%, or £36.8m); Leeds (8%, or £39.3m) and 7% directed online.

- 8.44 It is clear from the results that Halifax is competing directly with the larger centres of Leeds City Centre, Bradford City Centre, Huddersfield Town Centre and the out-of-centre retail parks at Birstall and White Rose. It is considered that there is a qualitative need to improve the non-bulky comparison goods offer in Halifax in order to reflect its 'sub-regional town' status in the RSS. This may be achieved by enhancing and improving current provision within the town centre in order to reduce the need for local residents to travel significant destinations to access a wide range of goods. From our knowledge of the competing centres, WYG are well aware of the opportunity for Bradford and Huddersfield to improve their image as a non-bulky goods destination. Whilst Halifax benefits from Marks and Spencer, River Island, New Look Top-Shop/Man and a Dorothy Perkins, the centre does have a number of key fashion retailers absent including, Next, French Connection, Gap and Primark. If Halifax is to compete with Leeds, Bradford and the significant level of regionally important out-of-centre development then Halifax needs to diversify and improve its current retail offer to that which is expected in a major sub regional centre.
- 8.45 The retention of expenditure in the Study Area for 'bulky goods' (i.e. electrical, furniture, DIY, etc) is identified by the Household Survey to exceed that achieved for non-bulky goods (54% compared with 46% for non-bulky goods). Even within Zones 1, 5, 6, 8, 10 and 12, existing facilities within Calderdale District are identified to retain over 75% of all the bulky goods expenditure generated by residents within these six zones. This is a particularly strong retention rate and we therefore do not believe that there is a qualitative need to improve on the current provision within Halifax significantly.

Summary

- 8.46 Within the District, Halifax Town Centre plays a modest convenience goods shopping role. The convenience goods sector is under represented albeit dominated by the out of centre Tesco store at King Cross and the Asda store at Thrumhall Lane. The retention levels with the District are sustainable and demonstrate that there is limited leakage to facilities outside Calderdale in the key survey zones. This would suggest that despite a quantitative need for a foodstore there is less qualitative need (given current retention levels) to improve the convenience goods provision within



Halifax Town Centre. However, existing facilities are identified to be overtrading which is a demonstration of qualitative need.

- 8.47 Given the significant growth anticipated in comparison goods expenditure, our assessment identifies capacity of up to 44,455 sq m (net) of additional comparison goods floorspace by 2026, just to maintain current market share – however this level of capacity assumes no increase in Special Forms of Trading, such as online shopping, and assumes that the level of inflow identified to Halifax will continue through to 2026.
- 8.48 This is considered to be a significant level of floorspace, which will almost double the current level of floorspace within Halifax Town Centre. There is also a specific qualitative need to improve the quality and range of the comparison goods sector of the town centre. However, it is important that any additional retail development within Halifax contributes to the vitality and viability of the existing centre and is well related to the current primary and secondary frontages.
- 8.49 In this respect, it is important to highlight that Halifax is performing well below its potential and is in need of regeneration and investment. However, given the physical (topography) around the town centre and highway infrastructure constraints around the town centre, it may be difficult to find any obvious site opportunities to meet this demand for new shopping floorspace.

Brighouse

Overview

- 8.50 Brighouse is situated approximately 8km to the south east of Halifax and 8km to the north of Huddersfield. The town is located adjacent to the A641 which connects to the M62.
- 8.51 Brighouse is identified as a 'Town Centre' in the adopted Replacement UDP. The central shopping area of Brighouse is focused around Commercial Street and Bradford and Huddersfield Road. The town centre is identified by Experian Goad to comprise approximately 10,140 sq m of convenience floorspace and 10,580 sq. m of comparison floorspace within 93 units, making it the second largest town centre in Calderdale in terms of floorspace and units. The town centre also benefits from a considerable level of service provision.



Convenience Goods Shopping

- 8.52 As highlighted in the retail 'health check' contained at **Appendix 5**, convenience retailing is well provided for, with both the proportion of units and the proportion of floorspace well above their respective national averages. This sector is dominated by two large scale format supermarkets, the Sainsbury's at Mill Lane and the new Tesco store at Bradford Road. Both stores are well located in relation to the defined town centre but are considered to be edge of centre. Other convenience traders in the town centre are predominately smaller independent convenience outlets.
- 8.53 The Household Survey identifies that facilities within Brighouse retain **14.7%** of convenience goods expenditure generated in the Study Area in 2009. This equates to a convenience goods turnover of approximately £54.2m. In Zone 2 which covers Brighouse, the town centre and edge of centre facilities retain 81% of the available convenience expenditure generated in this zone. A plan indicating the extent of Brighouse's main food shopping catchment is contained at **Appendix 8**.
- 8.54 In terms of the individual foodstores within Brighouse, it is understandable that the survey results identify the Tesco store to be the most dominant destination attracting £38.5m of convenience goods expenditure generated within the Study Area. This represents 71% of the overall retention of facilities in Brighouse, underlying its dominance on convenience goods shopping patterns within the local area. The second most popular destination was the Sainsbury's store on Mill Lane, which attracts £10.2m from the study area. Other local shops attract £5.5m from the Study Area in 2009. In addition, some £2.7m of convenience expenditure is identified to be attracted to facilities from outside the Study Area, primarily to the existing Tesco store.
- 8.55 In terms of capacity for additional convenience goods floorspace within Brighouse, Table 8.7 provides a breakdown of the trading performance of existing foodstores in Brighouse.



Table 8.7: Trading Performance of Current Foodstores in Brighouse

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate** – £m
Brighouse Town Centre						
Jack Fulton, Bradford Road, Brighouse	150	105	105	3,000	0.3	1.1
Local Shops, Brighouse Town Centre	1,250	1,000	1,000	3,500	3.5	4.4
Sub Total	1,400	1,105	1,105		3.8	5.5
Edge of Centre						
Sainsbury's, Mill Lane, Brighouse	2,830	1,698	1,289	9,276	12.0	10.2
Tesco, Bradford Road, Brighouse	6,060	3,636	2,425	12,145	29.5	41.2
Sub Total	8,890	5,334	3,714		41.5	51.4
TOTAL	10,290	6,439	4,819		45.3	56.9

Notes: ¹ - Gross and net Floorspace Derived from Experian Goad or IGD where known
² - Gross to net split for existing local shops based on 80/20 and for Tesco/Sainsbury 60/40.
³ - Net Convenience floorspace based on information provided by Verdict (2009) for Tesco, Sainsburys and WYG judgement for local shops/markets
⁴ - Sales density derived from Verdict (2009) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops/markets
 ** Includes inflow from outside the defined study area.
 At 2006 prices

8.56 Our analysis of Brighouse’s market share (together with inflow from outside the Study Area) indicates that it achieves a convenience goods turnover of approximately £56.9m in 2009. By comparing this estimate with the anticipated ‘benchmark’ turnover of existing facilities (£45.3m), there would appear to be a potential undersupply of convenience retail facilities of approximately £11.6m in 2009.

8.57 It is apparent from examination of the trading performance of existing stores in the town centre that the local shops are performing very well. However, the Sainsbury’s store is under-performing which might in part be due to its compromised format. In comparison, the Tesco store is identified to be overtrading by some £11.7m (or 40%). Overall, existing facilities appear to be performing some 26% above expected level. However, this is predominantly due to the level of inflow from outside the study area. If this inflow was excluded then the level of overtrading would reduce to less than 20% above expected level. In light of recent permissions for new convenience goods floorspace in the surrounding area (such as the new Tesco store at Cleckheaton), it is likely that the level of surplus expenditure will be lower should the level of inflow attracted to Brighouse reduce.



Table 8.8: Estimated Capacity for Additional Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009`	45.3	56.9	11.6
2014	46.4	59.7	13.3
2019	47.6	63.9	16.3
2026	49.3	70.3	21.0

Notes: ¹ - Allows for increased turnover efficiency of +0.5% per annum
² - Assumes constant market share at 14.7% in the Study Area and 5.0% from 'inflow'
 At 2006 prices

8.58 In the short term (i.e. up to 2014) our analysis identifies that there is capacity for approximately £13.3m of additional convenience goods floorspace in Brighouse based on current market shares. By 2026 this capacity increases to £21.0m. The current 'capacity' identified represents a need for at least 1,085 sq m (net) of convenience goods floorspace by 2014 increasing to at least 1,610 sq m (net) by 2026, depending upon the end operator (Table 8.9). This capacity suggests demonstrable capacity for an additional small to medium sized foodstore in the short-term (i.e. 2014) – dependent upon the end operator.

Table 8.9: Quantitative Need for Additional Floorspace in Brighouse

Year	£m	Convenience Goods	
		Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	11.6	970	2,320
2014	13.3	1,085	2,595
2019	16.3	1,295	3,100
2026	21.0	1,610	3,860

Notes: ¹ - Average sales density assumed to be £11,972/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2009)
² - Average sales density assumed to be £5,000/sq m
 * Allows for increases in turnover efficiency of +0.5% per annum
 At 2006 Prices

Commitments

8.59 WYG understands that there are no outstanding commitments which could absorb this capacity within the defined study area.

Qualitative Need – Convenience Goods

8.60 Facilities within Brighouse retain 81% of convenience goods expenditure generated within Survey Zone 2, which covers the main urban area of Brighouse and Rastrick. The results show that 14% (of the convenience goods expenditure within Zone 2) was spent at facilities in Kirklees, Bradford and to a lesser extent Leeds together with the internet/online.



8.61 Given this and the well balanced nature of shopping patterns within the town, WYG do not believe that there is a significant qualitative need to enhance or provide additional convenience goods floorspace in Brighouse. Notwithstanding this, the implementation of the new Tesco store in Cleckheaton may impact on the localised shopping patterns once trading starts which may lead to a reduction in inflow and reduce the strong performance of existing floorspace.

Comparison Goods Shopping

8.62 As highlighted in **Appendix 5**, the comparison goods offer in Brighouse is limited, with both the proportion of floorspace and units below the national average. The town centre is limited to key attractors such as Boots and Superdrug. However, the centre contains a diverse range of independents.

8.63 The Household Survey identifies that existing facilities in Brighouse achieve a comparison goods turnover (both bulky and non-bulky) of approximately £33.91m (includes Tesco and Sainsburys) from the defined Study Area in 2009. This represents a market share of approximately **4.8%** of the total comparison goods expenditure generated in the Study Area. The Household Survey demonstrates that for comparison goods shopping, Brighouse has an identified catchment population of approximately 10,802 people. This is the second highest comparison goods catchment in the district. It is also estimated that there is an inflow of £1.8m from neighbouring authorities (Kirklees, Bradford and Rochdale).

8.64 Brighouse contains 10,580 sq. m of comparison goods floorspace. Based on the level of comparison goods expenditure (£28.2m excluding Sainsburys and Tesco) drawn to the town centre. WYG estimate that the town centre has a derived sales density of £2,665 per sq. m. This appears to be low for a centre the size of Brighouse. Even by allowing for 'inflow' from outside the Study Area, this sales density increases to only £2,825 per sq. m in 2009.

8.65 By 'rolling forward' Brighouse's market share, it is possible to examine the likely level of additional comparison goods floorspace required in order to maintain its current market share.

8.66 Table 8.10 below estimates the likely expenditure that will be available for new comparison goods floorspace within Brighouse by 2026 at current market share.



Table 8.10: Estimated Available Comparison Goods Capacity

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	35.7	35.7	-
2014	38.5	40.9	2.4
2019	41.4	52.7	11.3
2026	46.0	75.0	29.0

Notes: ¹ - Allows for increased 'productivity' of +1.5% per annum
² - Assumes constant market share at 4.8% within the Study Area and constant inflow of 6.4%
At 2006 prices

8.67 Table 8.10 indicates that in the short-term (by 2014) there will be some £2.4m of comparison goods expenditure available for new retail floorspace based on current market shares. This level of expenditure capacity is identified to increase in the longer term to £29.0m by 2026. This level of capacity will be available for all comparison goods floorspace (i.e. bulky and non-bulky).

8.68 Although dependent upon the end-operator (e.g. retail warehousing, national multiple, independent, etc) by assuming an average comparison goods sales density of approximately £4,000/sq m, this equates to a floorspace requirement for 2,805 sq m (net) of additional comparison goods floorspace by 2014 of 555 sq m net (or 795 sq m gross¹²). This requirement is identified to increase to more than 2,435 sq m (net) by 2019 and to 5,625 sq m (net) by 2026 - although this will depend on the end operator.

Commitments

8.69 From review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional comparison goods floorspace in Brighouse.

Qualitative Need – Comparison Goods

8.70 With such a limited comparison goods offer the level of comparison goods provision with the centre could be significantly enhanced. However, given the convenience and service nature of Brighouse any future enhancement of comparison floorspace would need to be appropriate and ensure that its current role and function is not adversely affected.

8.71 Whilst the strength of competing centres within the District (Halifax) and the proximity of Huddersfield, Bradford and Junction 27/Birstall are clearly limiting Brighouse's current role, there appears to be a qualitative need to improve and enhance the comparison goods offer of the town

¹² Assumes net floorspace is 70% the gross



centre. However, it is important that any development should contribute to improving the vitality of the town centre and should reduce the need for local residents to travel to facilities elsewhere.

8.72 Consequently, a significant proportion of expenditure (c. 52%) is directed towards facilities outside the District from Zone 2, most notably to facilities in Kirklees (33%). Indeed, 16.5% of local residents visit Huddersfield Town Centre and 9% visit either Birstall Retail Park or Leeds Road Retail Park for their comparison goods shopping. In addition, some 10% of expenditure is directed to existing facilities in Leeds (Leeds City Centre and White Rose). Therefore, analysis of the findings of the Household Survey suggests that there is some scope to improve the comparison goods provision within Brighouse. This would help to reduce the need to travel to other facilities outside the district. Also, it would help towards encouraging economic investment in Brighouse through comprehensive retail led regeneration, which would secure Brighouse as Calderdale's second key centre.

Summary

8.73 Brighouse is identified to be an important convenience and service destination rather than a comparison goods shopping destination. The convenience goods sector is well represented and appears to be performing well (apart from the existing Sainsbury's store). The results show that over the plan period there may be some scope for additional convenience goods floorspace within Brighouse based on existing market share. However, the proposed Tesco store at Cleckheaton may have an influence on convenience shopping patterns in Brighouse in the future.

8.74 Brighouse performs a limited but important role as a comparison goods shopping destination (identified as the second highest performing centre in the District). The assessment identifies capacity for up to 5,625 sq m (net) of floorspace by 2026. There is also considered to be a qualitative need identified to improve the quality and range of the comparison goods sector. Indeed, the findings of the Household Survey suggest that there is modest 'leakage' to competing centres within the District and outside. Moreover, there is a lack of modern outlets within the centre as a whole, resulting in limited market shares being achieved for comparison shopping. Therefore, it is considered that there is a clear demonstrable 'need' for additional comparison goods floorspace within Brighouse, which will in turn help to enhance it as a comparison goods destination. Any new development would be designed sensibly to ensure that it is well located and connected to Commercial Street, and Bradford Road.



8.75 It is important that if any additional comparison goods floorspace is promoted within Brighouse that it contributes to the town's vitality and viability. It is important that the Council seek to resist further out-of-centre retail development that is likely to have an adverse impact upon the vitality of Brighouse Town Centre. Any new comparison goods floorspace will need to complement the convenience and service role that the centre performs.

Elland

Overview

8.76 Elland is located on the A629 in the south of Calderdale. It is situated some 6km to the south of Halifax and 7km to the north of Huddersfield. The main retail activity is centred along Southgate to the north and Huddersfield Road to the south. The town benefits from an outdoor market in the Town Hall Square. The town centre composition is dominated by service operators. This sector is well represented and above the national average. The centre is also underpinned by strong independent retailers which provide a unique shopping experience. However, given its limited size, Elland has below average representation of comparison retailing (1,850 sq. m).

Convenience Goods Shopping

8.77 The convenience goods sector is dominated by the Co-op Foodstore on Huddersfield Road (1,430 sq m gross) which accounts for 40% of all convenience goods floorspace within the town centre. There is also a Somerfield store (1,170 sq. m) on South Lane. These stores are complemented by a number of independent convenience stores (including good quality butchers, bakers).

8.78 The Household Survey identifies that existing facilities in Elland achieve a convenience goods market share of **2.2%** within the Study Area. This equates to a turnover of approximately £8.0m, which is split between both main food and top up food purchases. The Household Survey identifies that convenience facilities in Elland have a catchment population for main food shopping of approximately 3,371 people within the Study Area, the smallest of the six town centres within the district. Analysis of retail studies undertaken within the surrounding area found that there was a nominal level of inflow (£0.5m) of convenience expenditure from the neighbouring Kirklees local authority area.



8.79 In terms of capacity for additional convenience goods floorspace within Elland, Table 8.11 provides a breakdown of the trading performance of existing foodstores.

Table 8.11: Trading Performance of Current Foodstores in Elland

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate** – £m
Elland Town Centre						
Co-op Food Huddersfield Rd	1,430	1,001	861	5,826	5.0	3.2
Local Shops,	1,030	824	824	3,000	2.5	2.8
Somerfield	1,170	819	699	7,807	5.5	2.5
	3,630	2,644	2,384		13.0	8.5

Notes: ¹ - Gross and net Floorspace Derived from Experian Goad (2006) or IGD where known
² - Gross to net split for existing local shops based on 80/20 and for Co-op/Somerfield 70/30.
³ - Net Convenience floorspace based on information provided by Verdict (2009) for Tesco, Sainsburys and WYG judgement for local shops/markets
⁴ - Sales density derived from Verdict (2009) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops/markets
 ** Includes inflow from outside the defined study area.
 At 2006 prices

8.80 Our analysis of Elland’s market share estimates that existing facilities retain approximately £8.5m of convenience goods expenditure generated within the defined study area in 2009, including inflow of approximately £0.5m from outside the study area. This compares to an expected ‘benchmark’ turnover of existing provision of £13.0m. As such our analysis would appear to suggest that there is an oversupply of convenience goods floorspace in Elland, with existing floorspace undertrading by £4.5m (or 35%). Indeed, the Household Survey suggests that both the Co-op and the Somerfield store are under-trading by between 36% and 55% respectively, whilst the remaining local shops in Elland are identified to be performing well. However, it is likely that the ‘inflow’ of convenience goods expenditure attracted to Elland from outside the Study Area (albeit limited) will be distributed to all facilities, including the Co-op and Somerfield stores.

8.81 Having regard to the current underperformance of existing store, it is unlikely that there will be a need for additional convenience goods facilities within Elland through to 2026 based on current market shares.

Table 8.12: Estimated Capacity for Additional Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	13.0	8.5	-4.5
2014	13.3	9.0	-4.3
2019	13.7	9.7	-4.0
2026	14.1	10.6	-3.5

Notes: ¹ - Allows for increased turnover efficiency of +0.5% per annum
² - Assumes constant market share at 2.2% in Study Area inflow of 6.3%
 At 2006 prices



8.82 Our analysis suggests that there is currently no clear demonstrable capacity in Elland in either the short-term (i.e. 2014) or the long term (2026) for additional convenience goods floorspace based on current market shares.

Commitments

8.83 From our review of the Council's retail floorspace monitoring report (2008) there are no extant convenience goods planning permissions.

Qualitative Need – Convenience Goods

8.84 Elland benefits from two modest-foodstores (Co-op and Somerfield), which dominate the convenience goods sector in the town. However, both were found to be under performing when compared against expected levels.

8.85 The majority (81%) of turnover of Elland is drawn from Zone 3, demonstrating Elland's limited influence within the district. The results show that within Zone 3, Elland attracts nearly a third (32%) of all convenience goods expenditure generated in this zone. The results found that many of Zone 3's residents visited the Tesco store in Brighouse (Zone 2) and the Tesco at King Cross (Zone 1). In addition, it is notable that some 29% of the available convenience goods expenditure generated in Zone 3 was being spent outside the District. This was mainly at the Asda in Fixby, which was the most popular single destination for Zone 3 residents. This equates to approximately £6.6m leaking outside the district. WYG believes that given the proximity of these alternative destinations it is reasonable to expect some leakage of expenditure to competing centres due to travel to work patterns etc. However, we believe that there may be a qualitative need for new convenience goods floorspace to help enhance the level of consumer choice that will help foster more competition in this sector and claw back lost expenditure.

8.86 In summary we believe that the current convenience provision within the town is sufficient to meet local needs. Based on current market shares there is no quantitative need. However, there is a high level of leakage from Elland's primary catchment area to other facilities within and outside the district, therefore there may be a qualitative need to introduce a new operator in to Elland, this will help to enhance the current market share.



Comparison Goods Shopping

- 8.87 The comparison goods retail offer in Elland is limited comprising less than 1,850 sq m (gross) of floorspace. Accordingly, the Household Survey identifies that existing non-food facilities in Elland retain only **0.9%** (or £6.6m) of total comparison goods expenditure generated in the Study. The Household Survey demonstrates that for comparison goods shopping, Elland has an identified catchment population of approximately 2,119 people in 2009. This is the second lowest catchment area in the district, behind Sowerby Bridge. In addition, facilities within Elland benefit from inflow from outside the Study Area which attracts £4.1m, which represents 62% of comparison goods turnover of existing expenditure directed to facilities in Elland from the defined Study Area. This results in a total comparison goods turnover of approximately £10.7m in 2009.
- 8.88 By rolling forward the current market share of comparison facilities in Elland through to 2026, there will be £7.6m available for additional comparison goods floorspace in Elland.
- 8.89 Table 8.13 estimates the likely level of expenditure that will be available for new comparison goods floorspace within Elland by 2026 at current market share.

Table 8.13: Estimated Available Comparison Goods Capacity

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	10.7	10.7	-
2014	11.5	11.7	0.2
2019	12.4	15.0	2.6
2026	13.8	21.4	7.6

Notes: ¹ - Allows for increased productivity; at +1.5% per annum
² - Assumes constant market share at 0.9% in Study Area and 62.1% for inflow
 At 2006 prices

- 8.90 Table 8.13 indicates that in the short term (2014) there will be very limited surplus expenditure of £0.2m of comparison goods expenditure available for additional comparison goods floorspace reflecting the limited market share achieved by facilities in Elland. This level of capacity is identified to increase to £2.6m by 2019 and to £7.6m by 2026.
- 8.91 In floorspace terms, this equates to a requirement for only 60 sq m (net) of additional comparison goods floorspace in the short term (2014) assuming current market shares – based on applying an expected sales density of £3,000 per sq m in 2009 and allowing for increased productivity at +1.5% per annum. This requirement is identified to increase to 745 sq m (net) by 2019 and to



1,965 sq m (net) by 2026 - although the level of floorspace identified is dependent upon the end operator.

Commitments

- 8.92 From our review of the Council's retail floorspace monitoring report (2008) there are no extant convenience goods planning permissions.

Qualitative Need – Comparison Goods

- 8.93 The limited comparison goods offer of Elland is reflected by the low market shares achieved by existing facilities within the comparison goods sector. This low level of retention (less than 1%) underlines the convenience goods shopping and service role of Elland. Whilst there may be some potential to enhance the current offer, it is unlikely that the comparison goods market share of Elland will significantly improve in the future given the centre's proximity to the larger centres of Halifax, Brighouse, Huddersfield and Bradford.

Summary

- 8.94 Elland serves predominantly a convenience goods shopping role with its comparison goods offer being limited and influenced by the attraction of nearby larger centres such as Halifax.
- 8.95 Our analysis identifies that existing convenience goods floorspace is trading below expected level. Consequently, there appears no clear demonstrable need (at current market share) for additional convenience goods floorspace through to 2026. In terms of the comparison goods retail floorspace, given the forecast growth in expenditure (particularly in the long-term) there is identifiable capacity for approximately 1,965 sq m (net) by 2026 – although dependent upon the end operator.

Hebden Bridge

Overview

- 8.96 Hebden Bridge is located on the A646 Halifax Road. It is situated in the north west of Calderdale in Zone 12, approximately 13 kilometres north west of Halifax and seven kilometres north east of Todmorden.



8.97 In floorspace terms, (as identified by Experian Goad) Hebden Bridge is identified as the fourth largest centre within Calderdale, behind Halifax, Brighouse and Sowerby Bridge, comprising approximately 17,870 sq. m of floorspace.

Convenience Goods Shopping

8.98 The convenience goods sector in Hebden Bridge is dominated by the existing Co-op store on Market Street (1,040 sq m gross), accounting for almost half (48%) of convenience goods floorspace. Other convenience retailers include a small Spar store on Crown Street together with a range of independent retailers.

8.99 The Household Survey identifies that existing facilities in Hebden Bridge achieve a convenience goods market share of **2.5%** of all convenience goods expenditure generated in the Study Area. This equates to a turnover of some £9.3m in 2009. In addition some £0.3m of convenience goods expenditure is identified to be directed to existing facilities in Hebden Bridge from outside the defined Study Area.

8.100 In terms of capacity for additional convenience goods floorspace within Hebden Bridge, Table 8.14 provides a breakdown of the trading performance of existing floorspace.

Table 8.14: Trading Performance of Current Foodstores in Hebden Bridge

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate – £m
Hebden Bridge Town Centre						
Co-op, Market St	1,040	728	626	5,826	3.6	4.9
Local Shops,	980	784	784	3,500	2.7	4.6
Spar, Crown Street	160	128	128	6,749	0.8	0.1
	2,180	1,640	1,538	-	7.1	9.6

Notes: ¹ - Gross and net Floorspace Derived from Experian Goad or IGD where known
² - Gross to net split for existing local shops and Spar based on 80/20 and for Co-op 70/30.
³ - Net Convenience floorspace based on information provided by Verdict (2008) for Co-op, WYG judgement for local shops. Spar taken from Mintel Retail Rankings (2009)
⁴ - Sales density derived from Verdict (2009) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops.
 At 2006 prices

8.101 Our analysis of Hebden Bridge’s current market share is that existing facilities are trading above expected level (by £2.5m, or 35%). In particular, the Household Survey identifies that the Co-op together with other local shops are trading some 36% and 70% respectively above expected levels.



8.102 Given the current overtrading of existing floorspace, it is possible to estimate the likely need for additional convenience goods facilities within Hebden Bridge through to 2026 based on current market shares (Table 8.15).

Table 8.15: Estimated Capacity for Additional Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	7.1	9.6	2.5
2014	7.3	10.0	2.7
2019	7.5	10.7	3.2
2026	7.7	11.7	4.0

Notes: ¹ - Allows for increased turnover efficiency of +0.5% per annum
² - Assumes constant market share at 2.5% in Study Area and inflow of 3.2%
 At 2006 prices

Table 8.16: Quantitative Need for Additional Floorspace in Hebden Bridge

Year	£m	Convenience Goods	
		Floorspace Requirement	
		Min ^{1*}	Max ^{2*}
2009	2.5	210	500
2014	2.7	220	525
2019	3.2	255	610
2026	4.0	305	735

Notes: ¹ - Average sales density assumed to be £11,972/sq m (based on the average sales density of the leading large-format supermarkets as identified by Verdict 2009)
² - Average sales density assumed to be £5,000/sq m
 * Allows for increases in turnover efficiency of +0.5% per annum
 At 2006 Prices

8.103 Our assessment identifies capacity (at current market shares) within Hebden Bridge of almost £3m by 2014. This equates to a potential floorspace requirement of up to 525 sq m (net). By 2026, this capacity increases to £4.0m, which equates to a potential floorspace requirement of up to 735 sq m (net).

Commitments

8.104 It is our understanding that there are no extant convenience goods planning permissions within Hebden Bridge.

Qualitative Need – Convenience Goods

8.105 The convenience goods provision within Hebden Bridge is dominated by the Co-op store on Market Street. The findings of the Household Survey suggest that this store is overtrading. Indeed, overall existing provision within Hebden Bridge is identified to be trading some 35% above expected levels. This overtrading suggests a qualitative need for improved provision.



8.106 In terms of existing shopping patterns, within Zone 12 (where Hebden Bridge is located), existing facilities are identified to achieve a market share of 49% of convenience goods expenditure generated in this zone. Convenience goods expenditure directed to other facilities (c. £8m from this zone) is primarily directed to facilities elsewhere within the District. Popular stores include the Asda store at Thrumhall Lane near Halifax and the Morrisons store at Rochdale Road in Todmorden.

8.107 Although there is limited expenditure generated in Zone 12 that is directed to competing facilities outside the District (less than £1m) it is evident that improved provision in Hebden Bridge would improve the quality of the convenience goods offer of the centre and provide more sustainable development reducing the need for local residents to travel to competing centres elsewhere.

Comparison Goods Shopping

8.108 It is evident that Hebden Bridge contains a relatively strong range of comparison goods retailers many of which are independent retailers. Given the tourist nature of the town centre many of these are focused on arts and craft type goods. In total Hebden Bridge has 5,940 sq. m of comparison goods floorspace in 74 outlets.

8.109 On this basis, analysis of the household survey identified that the current level of trade passing through existing facilities in Hebden Bridge is estimated to be £13.9m in 2009. This represents **2.0%** of the total comparison goods expenditure (£703.9m) generated within the Study Area. Our analysis also identifies that Hebden Bridge benefits from some £2.6m of comparison goods expenditure generated by visitors to Hebden Bridge from outside the defined Study Area. Accordingly, the town centre is identified to achieve a comparison goods turnover of £16.5m in 2009 (generated by residents and visitors). Based on this overall turnover WYG estimates that the town centre has a derived sales density of approximately £2,780 per sq. m. This is considered to be marginally below what would be expected for a centre such as Hebden Bridge given the size of its retail offer.

8.110 By 'rolling forward' Hebden Bridge's current market share it is possible to examine the likely comparison goods floorspace required in order to maintain its current market share, namely at a level of approximately 2.0% and allowing for continued inflow. The Household Survey identifies Hebden Bridge achieving a comparison goods catchment population of approximately 4,212 people



in 2009. Although as previously highlighted, Hebden Bridge is also identified to attract a notable number of visitors from outside the Study Area.

8.111 It is forecast that between 2009 and 2026, an additional £18.4m will be available for comparison goods shopping within Hebden Bridge at current market shares.

8.112 Table 8.17 below estimates the likely expenditure that will be available for new comparison goods floorspace by 2026 at current market share.

Table 8.17: Estimated Available Comparison Goods Capacity

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	16.5	16.5	-
2014	17.8	19.0	1.2
2019	19.1	24.5	5.4
2026	21.2	34.9	13.7

Notes: ¹ - Allows for increased 'productivity'; at +1.5% per annum
² - Assumes constant market share at 2.0% in Study Area and 18.7% for inflow
 At 2006 prices

8.113 Table 8.17 indicates that by 2014 surplus capacity of more than £1m available for new retail development within Hebden Bridge. This level of expenditure identified to increase to £5.4m by 2019 and to £13.7m by 2026. This amount of expenditure will be available for all comparison goods floorspace (both 'bulky' and 'non-bulky').

8.114 In floorspace terms, by assuming an average comparison goods sales density of approximately £3,000 per sq. m in 2009 (and allowing for increased productivity at 1.5% per annum), this equates to a floorspace by 2014 for approximately 370 sq. m (net) of additional comparison goods floorspace (or 530 sq. m gross) within Hebden Bridge. This requirement is identified to increase to 1,550 sq. m (net) by 2019 and to 3,545 sq m (net) by 2026.

Commitments

8.115 It is our understanding that there are currently no outstanding commitments for additional comparison goods floorspace in Hebden Bridge.



Qualitative Need – Comparison Goods

- 8.116 The current market share of comparison goods facilities in Hebden Bridge (2.0%) is reflective of its current position within the retail hierarchy. Despite this, the survey centre is identified to attract a notable number of visitors from outside the Study Area.
- 8.117 Given the current role of Hebden Bridge there appears some scope to enhance the current comparison goods offer of the centre. However, any further improvement in the retail offer will need to be appropriate in scale and contribute to enhancing the continued vitality and viability of the centre.

Summary

- 8.118 Hebden Bridge serves an important role in meeting the day-to-day needs of the local population as well as serving an important tourism role. It is notable for comparison goods shopping; existing facilities achieve the highest retention of expenditure within Zone 12 comprising the Study Area. However, it appears that Hebden Bridge performs a stronger convenience goods shopping role (which is overtrading), despite lacking a large-format foodstore.
- 8.119 Our analysis identifies capacity by 2014 of some £3m available to support additional convenience goods floorspace, increasing to almost £4m by 2026. This equates to a potential floorspace requirement of up to 525 sq m (net) in 2014, increasing to up to 735 sq m (net) by 2026. With regard to comparison goods, our assessment identifies limited capacity of £1m in 2014, increasing to almost £14m by 2026. Although dependent upon the end operator, this represents a potential floorspace requirement of some 370 sq m (net) of additional comparison goods floorspace in 2014, increasing to 3,545 sq m (net) by 2026.

Sowerby Bridge

Overview

- 8.120 Sowerby Bridge is located on the A58, north of the M62 motorway and located some five kilometres south west of Halifax and 15km north west of Huddersfield. The focus of the town centre is primarily on Town Hall Street and Wharf Street together with the secondary shopping streets of Bolton Brow, Regent Parade, Station Road, Tower Hill and West Street.



8.121 The town centre comprises more than 19,000 sq m (gross) of floorspace, with strong representation in the comparison service sector, which represent 47% of all floorspace. Further retail floorspace is provided by the edge-of-centre Lidl store on Tuel Lane and the out-of-centre Tesco store (3,652 sq m gross) on West Road.

Convenience Goods

8.122 Existing convenience goods floorspace within the town centre is dominated by small independent retailers, which total some 1,992 sq m (gross) of floorspace. As previously highlighted, further convenience goods provision is provided by the Lidl and Tesco stores.

8.123 The Household Survey identifies that existing convenience goods facilities in Sowerby Bridge achieve a convenience goods turnover of £20.8m in 2009 (including the Lidl and Tesco stores). This equates to a market share of **5.7%** within the Study Area. The Household Survey identifies that convenience goods facilities in Sowerby Bridge have a catchment population for main food shopping of approximately 13,188 people within the Study Area in 2009.

8.124 In terms of capacity for additional convenience goods floorspace within Sowerby Bridge, Table 8.20 provides a breakdown of the trading performance of existing convenience goods floorspace.

Table 8.20: Trading Performance of Current Foodstores in Sowerby Bridge

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate – £m
Sowerby Bridge Town Centre						
Local Shops,	1,992	1,594	1,594	3,000	4.8	1.4
Edge of Centre						
Lidl, Tuel Lane	1,298	909	712	2,916	2.1	3.0
Out of Centre						
Tesco, West Road	3,652	2,191	1,462	12,145	17.8	16.3
	6,942	4,694	3,768		24.7	20.8

Notes: ¹ - Gross and net Floorspace Derived from Experian Goad or IGD where known
² - Gross to net split for existing local shops based on 80/20 and for Lidl 70/30 and Tesco 60/40.
³ - Net Convenience floorspace based on information provided by Verdict (2009) for Lidl and Tesco, WYG judgement for local shops.
⁴ - Sales density derived from Verdict (2008) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops.
 At 2006 prices

8.125 Our analysis of Sowerby Bridge’s current market share identifies that existing floorspace is trading below expected levels (£20.8m compared to an expected turnover of £24.7m). Given this undertrading (16% below expected levels), even after allowing for forecast growth in convenience



goods expenditure through to 2026 there is no clear demonstrable capacity for additional convenience goods floorspace in Sowerby Bridge based on current market shares.

Commitments

- 8.126 From our review of the Council's retail floorspace monitoring report (2009) there is an existing consent to extend the sales area of the existing Lidl store at Tuel Lane (LPA Ref: 09/00297/FUL) by 143 sq m. Although the convenience/comparison goods split of this additional floorspace is unknown, based on the assumption that the entire additional floorspace is for the sale of convenience goods, this equates to a turnover of only £0.2m in 2009¹³.

Qualitative Need – Convenience Goods

- 8.127 Convenience goods floorspace within Sowerby Bridge is dominated by the out-of-centre Tesco store, which is located a short walk from the town centre. However, this store is identified to be performing below expected levels. Indeed, collectively existing convenience goods floorspace (both in-centre and out-of-centre) is identified to be trading below expected levels. This undertrading suggests that there is no clear qualitative need to improve the convenience goods offer in Sowerby Bridge.
- 8.128 Understandably, Sowerby Bridge is identified to draw most of its trade (65%) from Zone 8. As would be expected most convenience goods expenditure attracted to facilities in Sowerby Bridge is directed to the existing out-of-centre Tesco store. Within Zone 8, facilities in Sowerby Bridge attract more than half (54%) of convenience goods expenditure generated in this zone. It is notable that less than 2% of expenditure generated in this zone is directed to facilities outside the District.
- 8.129 In summary, our assessment does not consider that there is a clear qualitative need for improved convenience goods provision within Sowerby Bridge.

Comparison Goods Shopping

- 8.130 The comparison goods offer within Sowerby Bridge is dominated by independent traders and comprises some 5,129 sq m (gross) of floorspace (Experian Goad, 2008). The Household Survey

¹³ Based on applying an average sales density for Lidl of £2,916 per sq m and the commonly accepted assumption that the additional floorspace will trade at 50% expected levels.



identifies that existing facilities in Sowerby Bridge achieve a comparison goods turnover of £3.4m in 2009. This equates to a market share of only **0.5%** within the Study Area.

8.131 By rolling forward the current market share of comparison goods facilities in Sowerby Bridge through to 2026, some £2.9m of additional comparison goods expenditure will be directed to facilities in Sowerby Bridge.

8.132 Table 8.23 below estimates the likely expenditure that will be available for new comparison goods floorspace within Sowerby Bridge by 2026 at current market share.

Table 8.23: Estimated Available Comparison Goods Capacity

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	3.4	3.4	-
2014	3.7	4.0	0.3
2019	3.9	5.2	1.3
2026	4.4	7.3	2.9

Notes: ¹ - Allows for increased productivity; at +1.5% per annum
² - Assumes constant market share at 0.5% in Study Area and no inflow
 At 2006 prices

8.133 Table 8.23 indicates that in the short term (up to 2014) there will be less than £1m of comparison goods expenditure available for new retail development based on current market share. This level of expenditure capacity is identified to increase in the longer term to £1.3m by 2019m and to almost £3m by 2026. The level of capacity will be available for all comparison goods floorspace.

8.134 Although this capacity is dependent upon the end operator (e.g. retail warehousing, national multiple, independent etc) by assuming a average comparison goods sale density of approximately £3,000 per sq. m in 2009 and allowing for increased productivity, this equates to a floorspace requirement of only 90 sq. m (net) of additional comparison goods floorspace by 2014 (or 130 sq. m gross). This floorspace requirement is forecast to increase to 750 sq. m (net) by 2026.

Commitments

8.135 From our review of the Council’s planning commitments (2008), there were no additional comparison goods (floorspace) planning commitments either within edge or in out-of-centre locations for Sowerby Bridge.



Qualitative Need –Comparison Goods

8.136 The limited comparison goods offer of Sowerby Bridge is reflected by the findings of the Household Survey. The current market share of Sowerby Bridge for comparison goods shopping is identified to be the lowest of all defined town centre in the district. The limited market share achieved by Sowerby Bridge Town Centre is reflective of its role in the district (serves primarily a convenience and service destination) and there appears limited scope to significantly improve the comparison goods offer of the centre.

Summary

8.137 Sowerby Bridge serves predominantly a convenience goods shopping role, although the main provision (Tesco store) is located outside the defined town centre boundary. Existing convenience goods provision within Sowerby Bridge is identified to be trading below expected levels. Accordingly, even after allowing for forecast growth in expenditure through to 2026 there appears no clear need for additional floorspace at current market shares.

8.138 Similarly, with regard to comparison goods floorspace, given the low market share currently achieved by existing facilities there is limited scope for additional comparison goods floorspace in Sowerby Bridge based on current market shares.

Todmorden

Overview

8.139 Todmorden is located on the A6033 (Rochdale Road), to the west of Halifax. The main focus of retailing within Todmorden is on Burnley Road and Halifax Road. The town centre is identified to comprise some 14,120 sq m (gross) of floorspace with strong representation in the convenience and retail service sectors.

Convenience Goods Shopping

8.140 The convenience goods sector is dominated by the out-of-centre Morrisons store on Rochdale Road (2,230 sq m gross). Further provision includes the edge-of-centre Lidl store on Halifax Road and a range of independent traders, including the local market.



8.141 The Household Survey identifies that existing facilities in Todmorden achieve a convenience goods market share of **5.9%** within the Study Area. This equates to a convenience goods turnover of £22.0m in 2009. Unsurprisingly, most (74%) of this expenditure is directed to the out-of-centre Morrisons store on Rochdale Road. The Household Survey identifies that convenience goods facilities in Todmorden have a main food shopping catchment of approximately 13,000 people within the Study Area. In addition, the survey evidence suggests that facilities in Todmorden (although directed only to the Morrisons store) attract some £1.4m of convenience goods expenditure from outside the defined Study Area in 2009. By including this inflow, the overall convenience goods turnover of Todmorden increases to £23.4m in 2009.

8.142 In terms of capacity for additional convenience goods floorspace within Todmorden, Table 8.24 provides a breakdown of the trading performance of existing foodstores in Todmorden.

Table 8.24: Trading Performance of Current Foodstores in Todmorden

Store	Gross Floorspace – sq m ¹	Net Floorspace – sq m ²	Net Convenience – sq m ³	Turnover per sq m ⁴ – £	Benchmark Turnover – £m	Survey Estimate** – £m
Todmorden Town Centre						
Local market	940	752	376	2,000	0.8	0.3
Local Shops	1,010	808	808	3,000	2.4	3.3
Edge of Centre						
Lidl, Halifax Road	1,270	889	697	2,916	2.0	2.2
Out of Centre						
Morrison's, Rochdale Road	2,230	1,394	1,112	10,664	11.9	17.7
	5,450	3,843	2,993	-	17.1	23.4

Notes: ¹ - Gross and net Floorspace Derived from Experian Goad or IGD where known
² - Gross to net split for existing local shops based on 80/20 and for Tesco/Sainsbury 60/40.
³ - Net Convenience floorspace based on information provided by Verdict (2009) for Tesco, Sainsburys and WYG judgement for local shops/markets
⁴ - Sales density derived from Verdict (2009) and Mintel Retail Rankings (2009) or national multiples and WYG assessment for local shops/markets
 ** Includes inflow from outside the defined study area.
 At 2006 prices

8.143 As previously indicated, our analysis of Todmorden's market share estimates that existing convenience goods floorspace has a turnover of £23.4m in 2009 (including inflow). This compares to an expected turnover of £17.1m. This suggests that existing floorspace is trading some 37% (or £6.3m) above expected levels. Indeed, the out-of-centre Morrisons store on Rochdale Road is identified to be trading some 49% above expected level.

8.144 Given this overtrading, Table 8.25 estimates the likely capacity for additional convenience goods floorspace based on current market share (i.e. 5.9%) and allowing for continued inflow.



Table 8.25: Estimated Capacity for Additional Convenience Goods Facilities

Year	Turnover - £m ¹	Expenditure Available - £m ²	Surplus Expenditure - £m
2009	17.1	23.4	6.3
2014	17.3	24.3	7.0
2019	17.4	26.0	8.6
2026	17.9	28.6	10.7

Notes: ¹ - Allows for increased turnover efficiency of +0.5% per annum
² - Assumes constant market share at 5.9% in the Study Area and 6.4% from 'inflow'
 At 2006 prices

8.145 Table 8.25 illustrates that there is potential surplus capacity in the short-term (i.e. 2014) of approximately £7m. This is identified to increase to almost £11m by 2026. This surplus capacity equates to a potential floorspace requirement of up to 1,365 sq m (net) in 2014, increasing to up to 1,965 sq m (net) by 2026.

Table 8.26: Quantitative Need for Additional Floorspace in Todmorden

Year	Convenience Goods	
	£m	Floorspace Requirement
		Min ^{1*} Max ^{2*}
2009	6.3	525 1,260
2014	7.0	570 1,365
2019	8.6	685 1,635
2026	10.7	820 1,965

Notes: ¹ - Average sales density assumed to be £11,972/sq m (based on the average sales density of the leading four supermarkets as identified by Verdict 2007)
² - Average sales density assumed to be £5,000/sq m
 * Allows for increases in turnover efficiency of +0.5% per annum
 At 2006 Prices

Commitments

8.146 From our review of the Council's retail floorspace monitoring report (2008) there are no extant convenience goods planning permissions.

Qualitative Need – Convenience Goods

8.147 Todmorden benefits from a medium-sized superstore (Morrisons store on Rochdale Road), although it is located outside the established centre. Existing convenience goods provision within Todmorden is identified to be overtrading, suggesting that there is a qualitative need to improve provision and reduce this overtrading.

8.148 The majority (80%) of convenience goods turnover attracted to facilities in Todmorden is derived from Zone 11. Within this zone, Todmorden is identified to attract more than three-quarters (78%) of expenditure generated. This suggests that limited convenience expenditure generated in this



zone is spent at destinations elsewhere. Given this, there appears limited scope to significantly improve the market share achieved by existing facilities in Todmorden.

8.149 Despite this, there maybe some qualitative benefit of improving the convenience goods offer to reduce the current overtrading, dominance of the existing Morrisons store and provide increased consumer choice.

Comparison Goods Shopping

8.150 The Household Survey identifies that existing facilities in Todmorden achieve a comparison goods turnover (both bulky and non-bulky) of approximately £11.3m from the defined Study Area in 2009. This represents a market share of approximately **1.6%** of the total comparison goods expenditure generated in the Study Area. The Household Survey identifies Todmorden achieving a comparison goods catchment population of approximately 3,637 people. In addition, our assessment of shopping patterns in the wider area suggests that Todmorden benefited from a comparable level (£10.0m) of inflow from adjoining areas.

8.151 By 'rolling forward' Todmorden's market share, it is possible to examine the likely level of additional comparison goods floorspace required in order to maintain its current market share. It is forecast that between 2009 and 2026, an additional £16.8m will be available for comparison goods shopping within Todmorden.

8.152 Table 8.27 below estimates the likely expenditure that will be available for new comparison goods floorspace within Todmorden by 2026 at current market share.

Table 8.27: Estimated Available Comparison Goods Capacity

Year	Turnover - £m ¹	Expenditure - £m ²	Surplus Expenditure - £m
2009	21.3	21.3	-
2014	22.9	24.1	1.2
2019	24.7	31.0	6.3
2026	27.4	44.2	16.8

Notes: ¹ - Allows for increased 'productivity' of +1.5% per annum
² - Assumes constant market share at 1.6% within the Study Area and constant inflow at 88.2%
 At 2006 prices

8.153 Table 8.27 indicates that in the short-term (by 2014) there will be some £1m of comparison goods expenditure available for new retail floorspace based on current market shares. This level of expenditure capacity is identified to increase in the longer term to £16.8m by 2026. This level of capacity will be available for all comparison goods floorspace.



8.154 Although dependent upon the end-operator (e.g. retail warehousing, national multiple, independent, etc) by assuming an average comparison goods sales density of approximately £3,500/sq m, this equates to a floorspace requirement for 320 sq m (net) of additional comparison goods floorspace by 2014 (or 455 sq m gross¹⁴). This requirement is identified to increase to more than 1,550 sq m (net) by 2019 and to 3,725 sq m (net) by 2026.

Commitments

8.155 From our review of the Council's retail floorspace monitoring report (2008) there are no outstanding (extant) planning commitments for additional comparison goods floorspace in Todmorden.

Qualitative Need – Comparison Goods

8.156 Although existing facilities within Todmorden achieve a limited comparison goods market share within the Study Area, given its position at the edge of the District, the centre also appears to attract a high level of expenditure from outside the Study Area (most notably from the adjoining local authority area of Rochdale).

8.157 Given the important role that Todmorden appears to serve both within and outside the district there is some scope to improve the comparison goods offer. Within Zone 11, where Todmorden draws most of its trade, existing facilities are identified to achieve a comparison goods market share of only 20% within this zone. This compares to more than 58% of expenditure being directed to facilities outside the District, most notably to Rochdale and Manchester.

Summary

8.158 Todmorden serves an important role at the edge of Calderdale District. The convenience goods offer is dominated by the out-of-centre Morrisons store on Rochdale Road, which is identified to be overtrading. Given the overtrading of existing facilities, there is a demonstrable need for up to 1,365 sq m (net) of additional convenience goods floorspace in 2014, increasing to up to 1,965 sq m (net) by 2026.

¹⁴ Assumes net floorspace is 70% the gross



8.159 With regard to comparison goods shopping, although within the Study Area Todmorden attracts approximately £11m of expenditure generated, it attracts a comparable level of expenditure from residents located just beyond the Study Area (c. £10m). Given the forecast growth in expenditure there is identified to be capacity for approximately 320 sq m (net) by 2014, increasing to 3,725 sq m (net) by 2026. However, there may also be scope (through appropriate provision) to improve the current market share of Todmorden in the future.

Role of Local Centres/Local Parades

8.160 In addition to the main centres, throughout the district are a number of smaller local centres (such as Mytholmroyd, Hipperholme and Ripponden) together with smaller parades (including Boothtown and Holywell Green) that provide important roles in meeting some of the day-to-day needs of the local population. Collectively, these smaller centres and shopping parades achieve a convenience goods market share within the Study Area of 2.5%. This equates to an overall turnover of £9.1m in 2009, of which more than a third (35%, or £3.2m) is directed to facilities in Mytholmroyd, which includes a Co-op Late Shop and Sainsbury's Local. These smaller centres serve predominantly a 'top-up' shopping role.

8.161 With regard to comparison goods shopping, the smaller centre and shopping parades attract less than 2% (or £9.0m) of expenditure generated in the Study Area in 2009. Again, Mytholmroyd is identified as a popular destination, attracting approximately a quarter (24%) of this expenditure.

8.162 Whilst there is unlikely to be significant need to improve the retail offer of these smaller centres/parades, given their important roles in meeting day to day needs, it is important that the Council seeks to maintain if not enhance their status in the future.

Potential Growth of Internet Sales

8.163 Whilst there is the potential for the market share of Calderdale District to improve through enhanced provision it is also important to take into consideration the potential growth of shopping on the internet.

8.164 As highlighted in Section 2 of this Study, it is likely that online shopping will continue to grow and have an impact upon floorspace requirements within the District and beyond. Indeed, it is



considered that the potential growth of online retailing will have a greater impact upon smaller centres within the UK.

8.165 Analysis undertaken by Experian identifies that there is a high degree of uncertainty in projecting the uptake of new technology and therefore the growth of internet shopping. Much of the speculation about online sales could turn out to be 'hype' and the recent growth is a one-off result of the boom in broadband uptake. Notwithstanding this, the likely growth in online sales remains an important consideration and it is important to assess the implications of this sector increasing in the future.

8.166 The modelling outlined in this study is based upon the current market shares achieved for on-line/catalogue sales identified in the Household Survey for each type of good identified. These are identified as follows:

- Convenience goods shopping - 1.0% of total expenditure
- Comparison goods shopping - 6.5% of total expenditure
 - Clothing & Footwear* - 3.6%
 - Furniture* - 2.6%
 - DIY* - 1.1%
 - Electrical* - 13.4%
 - Books, CD's, DVD's* - 22.4%
 - Other Small Household Goods* - 4.5%
 - Recreation Goods* - 9.7%
 - Chemist Goods* - 2.8%

8.167 The Household Survey identifies relatively high levels of market shares achieved by online sales. However, research undertaken by Experian forecasts that this market share could increase to 6.5% for convenience goods and to 12.4% for comparison goods by 2014.

8.168 By assuming this potential increase in Special Forms of Trading (SFT) by 2014 and assuming that the market share of non-store retail sales could increase to 15% by 2026, it is notable that the capacity identified for additional retail floorspace will reduce, as demonstrated at Table 8.28.



Table 8.28: Potential Impact of Increased Special Forms of Trading (2008-2026)

Sector	Capacity (£m)			
	2014		2026	
	<i>Constant SFT</i>	<i>Increasing SFT</i>	<i>Constant SFT</i>	<i>Increasing SFT</i>
Comparison Goods				
Halifax	21.8	-2.3	286.3	222.7
Brighouse	2.4	-	29.0	22.6
Elland	0.2	-0.5	7.6	5.8
Hebden Bridge	1.2	-	13.7	10.7
Sowerby Bridge	0.3	0.1	2.9	2.3
Todmorden	1.2	-0.2	16.8	13.1
Calderdale District	27.8	-3.4	370.4	288.0

Notes: WYG (2009)

8.169 Table 8.28 demonstrates that the potential increase in internet sales could have an impact upon future capacity within the District. By assuming an increase in internet sales, there would potentially be no capacity within the District for additional comparison goods floorspace based on current market share. By 2027 the comparison goods capacity is identified to reduce from £370m to £288m, a reduction of more than £82m. Accordingly, the capacity within each of the main town centres will also reduce should online sales increase. For example, comparison goods capacity within Halifax is identified to reduce from £286m to £228m by 2026.

8.170 Clearly, the potential growth in internet sales and other forms of trading will have an impact upon the future capacity for additional comparison goods floorspace within the District. However, it is important to note that the actual impact of growth in internet sales is currently difficult to accurately assess. Therefore, it is important that the potential impact of online sales is monitored on a regular basis.



9.0 PRINCIPAL FINDINGS AND RECOMMENDATIONS

Introduction

- 9.01 This section of the report seeks to summarise the evidence gathered as part of this study. As can be seen from the analysis undertaken there is anticipated to be significant capacity across the District for additional retail floorspace (both convenience and comparison) through to the year 2026. In addition, the analysis undertaken identified that there is a qualitative need within parts of the District to enhance and improve existing retail provision in order to provide more sustainable shopping patterns.
- 9.02 With this in mind, it is important that Calderdale Council are pro-active in seeking to accommodate the need identified whilst also ensuring that the vitality and viability of existing centres within the District is maintained and where possible enhanced.

Retail 'Capacity' (Quantitative Need)

Convenience Goods

- 9.03 The market share achieved by all convenience goods facilities within the District derived from the Study Area is approximately 78% in 2009. This suggests that there is relatively little expenditure directed to competing facilities elsewhere (c. £81m in 2009). As would be expected, most expenditure that is directed to competing facilities elsewhere is from the peripheral areas (i.e. Zone 7 and Zone 3) where residents are located in close proximity to competing facilities in Bradford and Kirklees.
- 9.04 In addition, existing convenience goods facilities within the District are identified to attract some £16m of expenditure from outside the defined Study Area. Overall existing facilities are identified to achieve convenience goods turnover of almost £305m in 2009.
- 9.05 Based on current market shares, our analysis identifies capacity in the short-term (i.e. 2014) of some £89m within the District, increasing to £131m by 2026. This compares to outstanding commitments within the District having a combined convenience goods turnover of approximately £8m in 2026.



9.06 Clearly, outstanding commitments will only meet part (approximately 7%) of identified need for additional convenience goods floorspace in the District.

Comparison Goods

9.07 The market share achieved by all comparison goods facilities within the District is identified to be approximately 58% in 2009. Of the identified expenditure generated in the Study Area which is directed to facilities elsewhere, (c. £296m in 2009) most is derived from Zones 7 and 11 where facilities in Bradford and Great Manchester have a significant influence on shopping patterns within these zones. In addition, almost a fifth (19%) of this expenditure is spent online.

9.08 Existing comparison goods facilities within the District are identified to attract almost £57m of additional expenditure from outside the Study Area in 2009. Accordingly, by allowing for this 'inflow', collectively existing facilities within the District are identified to achieve a comparison goods turnover of more than £464m in 2009.

9.09 By assuming that the market share remains constant, this assessment identifies that there will be capacity of some £28m in 2014 to support additional comparison goods floorspace in the District. This capacity is forecast to increase to more than £370m by 2026. Existing commitments are identified to achieve a comparison goods turnover of almost £9m in 2014, increasing to just under £11m by 2026. Accordingly, whilst almost a third (32%) of the identified capacity could potentially be met by outstanding commitments, in the longer-term (i.e. 2026) outstanding commitments are identified to meet less than 3% of the identified capacity for additional comparison goods floorspace in the District.

Summary

9.10 The capacity outlined above is for additional convenience and comparison goods floorspace throughout the District. Table 9.1 provides a summary of 'capacity' (excluding outstanding commitments) for additional floorspace in the District on a centre-by-centre basis.



Table 9.1: Capacity for Additional Retail Floorspace within Calderdale District (2009-2026)

	Surplus Expenditure (£m)				Potential Floorspace Requirement (sq m net)			
	2009	2014	2019	2026	2009	2014	2019	2026
Convenience								
Calderdale District	80.7	88.9	105.6	131.3	6,740-16,140	7,245-17,340	8,390-20,090	10,075-24,125
Halifax	48.9	60.1	69.3	83.5	4,085-9,780	4,895-11,725	5,505-13,185	6,410-15,340
Brighouse	11.6	13.3	16.3	21.0	970-2,320	1,085-2,595	1,295-3,100	1,610-3,860
Elland	-	-	-	-	-	-	-	-
Hebden Bridge	2.5	2.7	3.2	4.0	210-500	220-525	255-610	305-735
Sowerby Bridge	-	-	-	-	-	-	-	-
Todmorden	6.3	7.0	8.6	10.7	525-1,260	570-1,365	685-1,635	820-1,965
Comparison								
Calderdale District	-	27.8	141.0	370.4	-	5,160-8,600	24,300-40,500	57,515-95,855
Halifax	-	21.8	109.2	286.3	-	4,045-6,745	18,820-31,365	44,455-74,090
Brighouse	-	2.4	11.3	29.0	-	445-745	1,950-3,245	4,505-7,505
Elland	-	0.2	2.6	7.6	-	40-60	450-745	1,180-1,965
Hebden Bridge	-	1.2	5.4	13.7	-	225-370	930-1,550	2,130-3,545
Sowerby Bridge	-	0.3	1.3	2.9	-	55-90	225-375	4,505-7,505
Todmorden	-	1.2	6.3	16.8	-	225-370	1,085-1,810	2,610-4,350

Notes: WYG (2009)

Floorspace requirement based on an average sales density of between £5,000 - £11,972 per sq m for convenience goods and allowing for increased productivity of +0.5% per annum
 Floorspace requirement based on an average sales density of between £3,000 - £5,000 per sq m for comparison goods and allowing for increased productivity of +1.5% per annum
 Floorspace capacity does not take into account outstanding commitments
 At 2006 prices

9.11 The retail capacity outlined at Table 9.1 is based on current market shares. Accordingly should improvement in the retail offer take place within the District this could have an impact on market shares/capacity elsewhere. Therefore, any application for new retail development within the District will need to take into account commitments/proposals elsewhere, both within and outside the District given the potential impact this may have on future shopping patterns.

Qualitative Need

Convenience Goods

9.12 Whilst it is acknowledged that across the District as a whole there is a reasonable provision of main food shopping destinations with relatively low expenditure being directed to facilities elsewhere, there is a specific need for improved distribution of facilities within the District to provide more sustainable shopping patterns. Furthermore, many of the main food shopping destinations within the District (which are focused primarily on Halifax, Brighouse and Todmorden) are identified by the survey evidence to be overtrading.

9.13 In this respect, it is considered that there is a need for improved convenience goods provision within the District in order to alleviate current overtrading and increase competition and choice. In this respect, there appears scope to improve provision in the District, including Halifax Town Centre



to improve consumer choice, Todmorden to address the overtrading of existing facilities and retain more locally generated expenditure and Elland to improve the distribution of facilities. However, any development needs to be appropriate in scale to the centre and catchment that it is intended to serve.

Comparison Goods

- 9.14 Although the market share achieved for comparison goods facilities within the District (58%) is less than that identified for convenience goods (78%) this is to be expected given the strength as a comparison goods destination of much larger centres nearby, such as Bradford and Leeds.
- 9.15 The survey evidence suggests that Halifax is the dominant destination within the District for comparison goods shopping. However, there is a specific qualitative need to improve the quality and range of the comparison goods sector of the town centre. In considering future comparison goods floorspace in Halifax it is important that any additional retail development contributes to the vitality and viability of the existing centre and is well related to the current primary and secondary frontages.
- 9.16 The comparison goods offer in other centres is much more limited, reflecting their position in the local retail network. Despite this, there is a qualitative need to improve the comparison goods offer in a number of centres. Within Brighouse (which is identified to be the second most popular retail centre in the District) there is a need for improved provision to reduce the significant number of shopping trips being directed to out-of-centre facilities elsewhere, including Birstall Shopping Park. Whilst leakage of expenditure is inevitable given the strength of Birstall Shopping Park as a comparison goods shopping destination, there does appear scope to reduce the level of shopping trips from the Brighouse area of the District directed to this facility. Similarly, there also appears scope to improve the comparison goods offer elsewhere in the District. Again, any further retail development will need to be appropriate in scale and be reflective of the centre's position within the network of centres in the network of centres in the District.
- 9.17 In relation to large-format bulky goods retailing, existing facilities within the District are identified to attract more than 62% of expenditure generated. This compares to an overall market share for comparison goods of 58% (including a market share of 56% for non-bulky goods). Given this, the bulky goods market share of facilities in the District is identified to be relatively strong.



Role of Existing Centres

- 9.18 Based on the analysis undertaken it is possible to identify the hierarchy or network of centres within the District.
- 9.19 The total turnover of the main six centres within the District considered as part of this study is identified to be £346.9m in 2009 (convenience and comparison) excluding inflow. Table 9.2 summarises the hierarchy, turnover, retail floorspace and the market share achieved by the main centres within the District (excluding out-of-centre facilities).

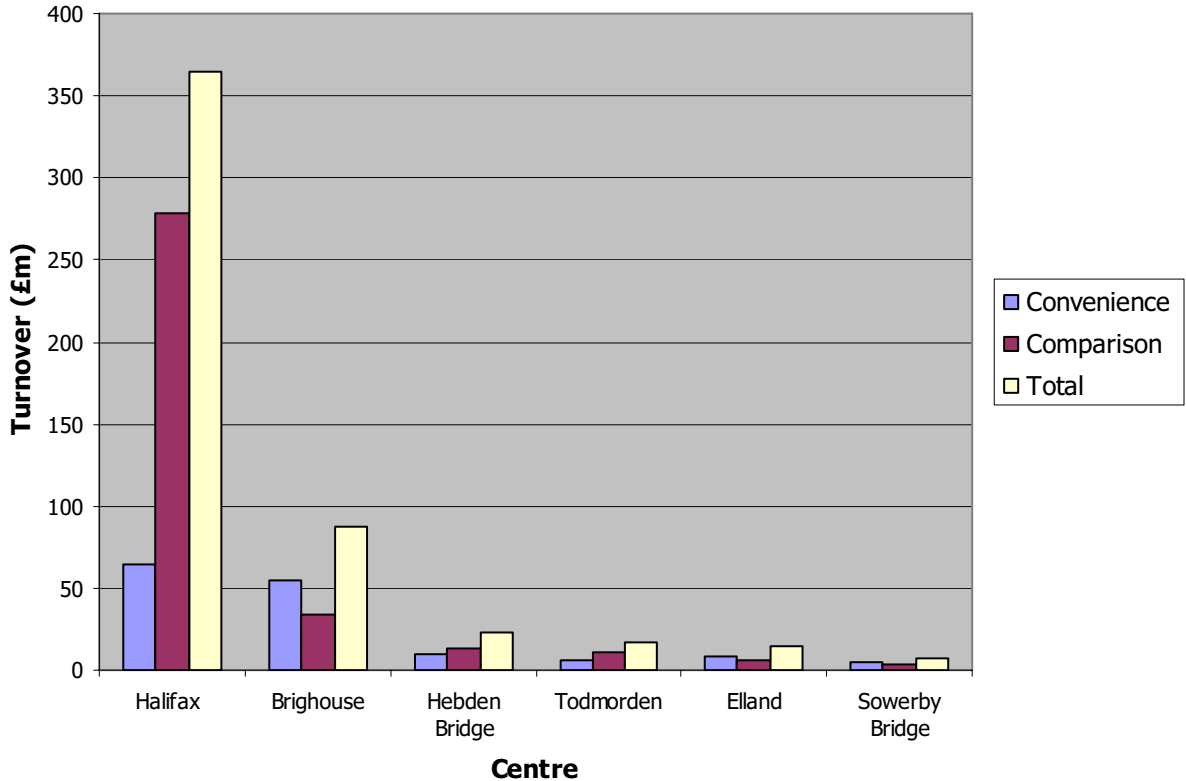
Table 9.2: Hierarchy and Market Share of the Main Centres within Calderdale District

Centre	Floorspace (sq m)	Convenience Turnover (£m)	Comparison Turnover (£m)	Total Turnover (£m)	Market Share in Study Area (%)	Market Share Amongst Centres (%)
1. Halifax	55,830	64.2	278.3	365.1	34.0	70.8
2. Brighouse	20,720	54.2	33.9	88.1	8.2	17.1
3. Hebden Bridge	8,120	9.3	13.9	23.2	2.2	4.5
4. Todmorden	6,500	5.8	10.7	16.5	1.5	3.2
5. Elland	5,480	8.0	6.6	14.6	1.4	2.8
6. Sowerby Bridge	8,419	4.4	3.5	7.9	0.7	1.5
TOTAL	105,069	145.9	346.9	515.4	48.0	100.0

Notes: WYG (2009)
 Excludes inflow
 Turnover includes in-centre and edge-of-centre facilities
 Floorspace derived from Experian/WYG survey and based on occupied convenience and comparison goods floorspace only
 At 2006 prices

- 9.20 Our analysis indicates that Halifax Town Centre is the dominant destination within the District, achieving an overall market share within the Study Area of 34%. In addition, strong retail provision (both convenience and comparison) is located at nearby out-of-centre facilities, which serve the needs of the local population.
- 9.21 Of the total retail expenditure retained by the main centres within the District (excluding out-of-centre facilities, smaller centres, etc.) more than 70% is attracted to Halifax Town Centre, underlying its dominance as the sub regional centre. However, it is notable that the turnover of Halifax Town Centre comprises approximately 82% comparison goods and 18% convenience goods. In contrast, the retail turnover of Brighouse is identified to comprise 62% convenience goods and 38% comparison goods turnover. Figure 9.1 illustrates the market shares achieved by the main centres within the District.

Figure 9.1: Retail Turnover Achieved by Main Centres within Calderdale District



Source: WYG (2009)

9.22 Each of the main centres within the District serves both a convenience and comparison goods shopping role at varying levels. Halifax is the dominant retail destination, followed by Brighouse.

Future Role of Existing Centres

9.23 In Section 8 of this study WYG have set out the key findings of the retail capacity analysis for each of the key centres. This examines the need for future retail floorspace in the short (within 5 years), medium (5 to 10 years) and long term (up to 2026). Clearly, this analysis underlines the fact that, as Halifax is the key destination for comparison goods shopping within the District with the greatest need is identified in the medium to long term. However, there are also significant needs identified within other parts of the District that will need to be addressed as part of the emerging LDF. Whilst much of this need is currently focused on convenience goods floorspace, there will be longer term



needs for comparison goods floorspace as the economy begins to recover and spending levels increase.

- 9.24 In terms of Halifax Town Centre, this study identifies a need for both convenience goods and comparison goods floorspace through to 2026. The convenience goods need is based on a current undersupply of floorspace which is resulting in overtrading at the existing supermarkets and superstores. The surplus expenditure identified in 2009 is £48.9m which will increase to £83.5m by 2026. This would be sufficient expenditure to support approximately 4,085 sqm net by 2014 which is more than sufficient for another superstore. Given that there are insufficient commitments to accommodate this identified need, it is evident that a site will need to be identified for a new foodstore within Halifax. Also it must be noted that there are significant inflows of expenditure to existing facilities within Halifax from surrounding areas and therefore some of this need may also be met in centres such as Elland where there is significant leakage of convenience goods expenditure to facilities in Halifax.
- 9.25 In terms of comparison goods, it would appear that the significant need for any future development will occur in the period 2014 to 2026. The town centre has a period of about five years to identify and deliver a suitable site to the market that will be able to accommodate the 44,455 sq. m (net) that would be required by 2026. The most obvious location for such a large scale development in the centre of Halifax is the area focused in and around the existing bus station. However, we are aware that any comprehensive redevelopment within the town centre will be complex given the significant land ownerships involved and the need to utilise CPO powers. The expansion of the central retail core in this location would have the added benefit of creating better linkages with the existing Sainsbury's store and the primary shopping area, as well as linking directly to the new leisure development that is currently being progressed on the opposite side of Northgate. WYG are aware that a masterplan is currently being developed for the town centre and that this will have to carefully consider how the needs identified through to 2026 could be accommodated through comprehensive redevelopment.
- 9.26 Any future redevelopment on this scale could also include a convenience goods element which would help meet some of the need identified within Halifax.



- 9.27 In terms of Brighouse, this study also identifies a shortfall in convenience goods expenditure, albeit on a much lower scale. In fact, in the short term there is just £11.6m available to support new convenience goods development within the centre. This is clearly insufficient to support a large superstore but could accommodate a small to medium sized foodstore depending upon the end operator.
- 9.28 In terms of non-food shopping, Brighouse is identified to be the second most popular destination within the district and therefore, it is anticipated that there will be a need for further comparison goods floorspace in the medium to long term. However, we anticipate that any future development would be limited by the expansion of the primary shopping area in Halifax and the market share that can be realistically achieved by Brighouse.
- 9.29 Based on its current market share, there will be a need for approximately 4,505 sqm (net) of comparison goods floorspace by 2026. Although this figure is not as significant as the requirement for Halifax, it is unlikely that both comparison and convenience goods need could be met within the existing town centre. We are aware that land to the south of the canal is currently being considered as an expansion for the town centre. However, any expansion of the town centre into this area will need to be given careful consideration in terms of the overall scale of development and the need to establish strong linkages with the established primary shopping area.
- 9.30 The next two key centres within the district are Hebden Bridge and Todmorden. Within Hebden Bridge the study identifies limited need for convenience and comparison goods floorspace in the future. The centre's current strong health clearly benefits from the range of independent traders and the high quality of the environment. Therefore, any large scale development on the edge or outside the centre could prove extremely damaging to its future role and function. Therefore, given the limited need within the centre through to 2026, WYG would not recommend any significant expansion of the retail role and function of Hebden Bridge. Clearly there are opportunities focused around the existing fire station and market place which could deliver small scale retail development in the future. However, beyond small scale redevelopment opportunities within the centre, WYG would not recommend any further development on the edge or outside the centre.



- 9.31 Based on Todmorden’s current market share, there would appear to be a need for future retail development to help support the future role and function of the centre. Currently, convenience goods shopping patterns are dominated by the existing Morrisons store on Rochdale Road which appears to be overtrading. Although the surplus need at this stage is not quite sufficient to support another store of a similar size it would appear that in order to enhance competition and choice within Todmorden there is a need for a second supermarket which can fulfil the role as a main food shopping destination. The store would also have an element of comparison goods which would help met the need identified in the short term.
- 9.32 In examining the potential for a new foodstore within Todmorden, the two most obvious sites are the vacant health centre on Rose Street and vacant site next to the new health centre off Halifax Road. From our site visits, it would appear that the health centre is too small to accommodate a foodstore of a similar size to Morrisons and without additional land being assemble. Therefore, it is unlikely that this site would prove viable. In comparison, the land off Halifax Road is clearly large enough to accommodate a supermarket but there are concerns over flooding which will need to be explored further in the short term. Although the site off Halifax Road is not as close to the primary retail core as the former health centre, it is well located close to the new health centre and is within easy walking distance of the primary shopping area.
- 9.33 In terms of Elland and Sowerby Bridge it would appear that there is limited scope for retail development within both centres through to 2026. Both centres currently have an over supply of convenience goods shopping facilities, although in the case of Elland there would appear to be significant leakage to facilities in Halifax. Therefore, there may be some scope in the future to enhance main food shopping facilities within Elland but any development would have to be of an appropriate scale so as not to undermine the current role and function performed by the existing Co-Op and Somerfield stores. With the development of the Tesco in Sowerby Bridge there is now no requirement for further convenience goods development through to 2026.

Implementation and Monitoring

- 9.34 It is important that any future planning application for the improved retail provision in the District should be supported by a detailed retail assessment, based upon the baseline evidence contained within this study, or any subsequent updates. The supporting information will also need to demonstrate that there would not be any material adverse impact upon the vitality and viability of



any existing centres, taking into account any strategies for the regeneration of such centres and that any development accords with the sequential approach of in-centre first, followed by edge-of-centre sites.

9.35 The recommendations and projections within this study are intended to inform the Council's LDF strategy regarding new retail and leisure development, and to assist development control decisions. The study provides a broad overview of the potential need for further retail development up to 2026. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available.

9.36 In this context, we would recommend that this study should be updated every three to four years and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- Population projections;
- Local expenditure estimates (information from MapInfo or other recognised provides);
- Growth rate assumptions for expenditure per capita (information from MapInfo or other recognised data provides);
- Forecast increases in turnover to floorspace efficiency;
- The impact of potential increases in home and internet shopping;
- Existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Mintel and Verdict); and
- Implemented development within and around the District.

9.37 It may be appropriate to undertake an updated household survey should major development (either within the District or just outside) be implemented in the intervening period, which could significantly affect shopping patterns.



9.38 Taking account of guidance in PPS6 (and emerging PPS4), it is also appropriate to review the vitality and viability of existing centres on a regular basis. This should be informed by a regular update of the survey of ground floor uses in the main centres in the District. This will allow the Council to analyse the mix and diversity of uses in the centres, vacancy levels, any deficiencies which may arise, and the overall performance of the centres over time, and should be used to inform the review and preparation of policies and proposals.



GLOSSARY OF TERMS

- Capacity -** Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities.
- Comparison Goods -** Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods (Table 3, Annex A, PPS6).
- Furniture Goods -** *Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, etc. – as defined by MapInfo – Explanatory Volume 2005 Expenditure*
- DIY Goods -** *Includes all consumer expenditure on hardware, DIY, decorators' supplies and garden centre type goods. This category includes products such as hammers, saw, screwdrivers, wallpaper, plumbing items, floorboards, ceramic tiles, plants, pots, turf for lawns, etc.*
- Electrical Goods -** *All consumer retail expenditure on domestic electrical and gas appliances, such as washing machines, dryers, dishwashers, ironing and press machines, cookers, freezers and fridge-freezers, coffee makers, radios, televisions, DVD players, etc.*
- Clothing & Footwear –** *All consumer retail expenditure on shoes and other footwear, garments for men, women, children and infants either ready-to-wear or made-to-measure, underwear, ties, handkerchiefs, scarves, etc.*
- CDs, DVDs, Books, etc. –** *Includes pre-recorded and blank media such as records and compact discs; pre-recorded and unrecorded tapes, cassettes, video cassettes, diskettes and CD-ROMs, books, scrapbooks, dictionaries, etc.*



- Household Goods –** *Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, etc.*
- Recreational Goods –** *All consumer retail expenditure on bicycles and tricycles (excluding toy bicycles), musical instruments, sports equipment, camping equipment, toys of all kinds including dolls, soft toys, etc.*
- Chemist Goods -** *All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, etc.*
- Convenience Goods -** Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Table 3, Annex A, PPS6).
- District Centre** District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. (Table 1, Annex A, PPS6).
- Edge-of-Centre** For retail purposes, a location that is well connected to and within easy walking distance (i.e. up to 300 metres) of the primary shopping area.
- For all other main town centre uses, this is likely to be within 300 metres of a town centre boundary¹⁷.
- In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances. For example, local topography will affect pedestrians’ perceptions of easy walking distance from the centre. Other considerations include barriers, such as crossing major roads and car parks, the attractiveness and perceived safety of the route and the strength of attraction and size



of the town centre. A site will not be well connected to a centre where it is physically separated from it by a barrier such as a major road, railway line or river and there is no existing or proposed pedestrian route which provides safe and convenient access to the centre. (Table 2, Annex A, PPS6).

Expenditure - Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods.

Expenditure per Capita - This is the average spend of each person within the defined study area on a variety of retail goods.

Expenditure Forecasts - This assessment has been undertaken using the 'goods based' approach as prescribed in PPS6, the information on consumer retail expenditure forecasts have been derived from MapInfo (2009).

Forecasts based on the anticipated increase in expenditure per annum for a both convenience and comparison goods as identified by MapInfo (-0.04% per annum (2009 to 2013) and +0.57% per annum for convenience goods post 2013 and +0.30% per annum (2009 to 2013) and +4.35% per annum post 2013 for comparison goods.

FOCUS Report- Is a database which is used by the commercial development industry. It provides market information on retail availability within specific town centres and retail parks. Up to date retailer requirements and deals is available.

GOAD Plans- Provide accurate retail information on town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Provides information on fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises.



GOAD Reports -

Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floor space and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.

Convenience (GOAD) -

GOAD defines this category as land uses including bakers, butchers, CTN, fishmongers, convenience store, frozen foods, greengrocers, grocers and delicatessens, health foods, markets, off licences, shoe repairs, supermarkets,

Comparison (GOAD) -

GOAD defines this category as antique shops, art and art dealers, booksellers, carpets and flooring, catalogue showrooms, charity shops, chemist and drugstores, children's and infants wear, clothing general, crafts, gifts, china and glass, cycles and accessories, department and variety stores, DIY and home improvement, electrical and other durable goods, florists, footwear, furniture fitted, furniture general, gardens and equipment, greeting cards, hardware and household goods, jewellery, watches and silver, ladies and menswear and acc., ladies wear and accessories, leather and travel goods, menswear and accessories, music and musical instruments, music and video recordings, newsagents and stationers, office supplies, other comparison goods, photographic and optical, second-hand goods, books, etc., sports, camping and leisure goods, telephones and accessories, textiles and soft furnishings, toiletries, cosmetics and beauty products, toys, games and hobbies, vehicle and motorcycle sales and vehicle accessories

Retail Service (GOAD) -

GOAD defines this clothing and fancy dress hire , dry cleaners and launderettes, filling stations, health and beauty, opticians, photo processing, photo studio, post offices, repairs, alterations and restoration, travel agents, TV, cable and video rental, vehicle rental, vehicle Repairs and Services and video tape rental



Leisure Service (GOAD) - *GOAD defines this category as bars and wine bars, bingo and amusements, cafes, casinos and betting offices, cinemas, theatres and concert halls, clubs, disco, dance and nightclubs, fast food and take away, hotels and guest houses, public houses, restaurants, and sports and leisure facilities*

Financial Service (GOAD) - *GOAD defines this category as building societies, building supplies and services, business goods and services, employment and careers, financial services, legal services, other business services, printing & copying, property services and retail banks.*

Gross Floorspace - This represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, etc).

Local Centre Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. (Table 1, Annex A, PPS6).

Management Horizons - Management Horizons Europe: UK Shopping Index (2008) considers approximately 7,000 retail venues in the UK, including town centres, stand alone malls, retail warehouse parks and factory outlet centres, based on a scoring system that considers the strength of multiples and anchor stores located within each venue.

MapInfo (AnySite) - The database used to identify population, expenditure and socio-economic breakdown of the study area population.



- Market Share -** Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility.

- National Multiple -** This is a retail or service operator which is or part of a network of nine or more outlets.

- Net Floorspace -** This entails the level of internal area devoted to the sale of goods.

- Out-of-Centre** A location which is not in or on the edge of a centre but not necessarily outside the urban area. (Table 2, Annex A, PPS6).

- Out-of-Town** An out-of-centre development outside the existing urban area. (Table 2, Annex A, PPS6).

- Price Base -** The price base for the study is 2006; all prices are or have been adjusted to 2006 in order to be consistent.

Primary Frontage	Primary frontages are likely to include a high proportion of retail uses. (Table 2, Annex A, PPS6).
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Primary Shopping Area Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area. (Table 2, Annex A, PPS6).



- Prime A Rents -** Zone A rents (the rental value of the first six metres depth of floorspace in retail outlets from the shop window). It provides a comparable indicator of the strength of individual outlets. As retailers consider rent to reflect the margin between turnover and operational costs (plus profit), the better the trading prospects the higher the rent that the operator will be willing to pay.
- Rates of Productivity -** This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.).
- Sales Density -** Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot.
- Secondary Frontage** Secondary frontages provide greater opportunities for a diversity of uses. (Table 2, Annex A, PPS6).
- Special Forms of Trading -** Defined by MapInfo as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls.
- Study Area -** This represents the household survey area, which is based on postal sectors.
- Town Centre** Town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and



how these contribute to its overall vitality and viability. (Table 1, Annex A, PPS6).

Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map. (Table 2, Annex A, PPS6).

Trade Draw - This refers to the level of trade attracted to a particular facility/centre.

Turnover - The turnover figure relates to the annual turnover generated by existing facilities.

Yield - A 'yield' represents the relationship between the rental income that a property is likely to command and its capital value, expressed as a percentage.