



Kirklees Council

Retail Capacity Study for Kirklees District

Final Report

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1.0 Introduction

Instruction

- 1.01 WYG Planning & Environment ('WYG') was commissioned by Kirklees Council ('the Council') in January 2013 to undertake an update of the previous Kirklees Retail Capacity Study which was completed in May 2008 and subsequently revised in June 2009. The key purpose of this Retail Study is to provide an assessment of retail needs and capacity in the period to 2028, and to provide an up-to-date review of the performance of the six town centres in the District. This is of particular importance given the downturn in the UK economy since the previous Kirklees Retail Capacity Study reported which has had a notable impact upon many town centres and the retail sector in general. The Study will therefore act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development.
- 1.02 The Retail Study draws upon new empirical research, with NEMS Market Research Limited (NEMS) undertaking surveys of 1,000 households within a defined Study Area and of 525 visitors to the six town centres in March 2013. The Study Area for the household survey comprises ten zones which are based on postcode sectors grouped around one or more of the existing main town centres. The Study also draws upon the most recent Experian population and expenditure data (published September 2012) in order to establish the up-to-date position with regard to both convenience and comparison goods capacity.

Structure of Report

- 1.03 The report is structured as follows:
- Section 2 provides a context for the Retail Study by providing an analysis of key retail trends;
 - Section 3 considers the up-to-date position in respect of relevant retail and town centre planning policy;
 - Section 4 sets out a review of the survey research and considers changes in shopping behaviour that have occurred since the undertaking of the previous Study;
 - Section 5 sets out an overview of the vitality and viability of the District's town centres;
 - Section 6 identifies current and future population and expenditure levels within the Study Area;
 - Section 7 provides our assessment of the quantitative and qualitative need for further convenience and comparison goods floorspace over the assessment period; and



- Section 8 summarises our findings in respect of the future need for additional retail floorspace in Kirklees.



2.0 Current and Emerging Retail Trends

Introduction

- 2.01 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail and leisure sectors have experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and convenience goods spending per capita has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.
- 2.02 The retail and leisure market and the need for new development continually evolves as a result of numerous factors including demographics, consumer demands, car ownership, planning policy and technological advancements. The share of retail spending has undergone a significant shift in the decade since 2002, with Verdict identifying that town centre spending as a proportion of overall spending declined from 47.7% to 39.9% at 2012. In contrast, spending in out of centre locations has increased over the same period by 2.1% and non-store locations (principally internet retailers) by 6.6%¹. These changes have had a major impact on the format and location of retail and leisure floorspace, which has led to recent Governments reaffirming their commitment to the 'town centre first' policy approach that is now outlined in the National Planning Policy Framework (NPPF) (March 2012).

Current Retail Picture

- 2.03 A recent report by Colliers² provides information regarding recent trends, together with forecasts for the future of retailing in the UK. The findings confirm that the retail sector has been significantly affected by the wider economic climate and that there is considerable uncertainty about the strength and durability of future growth. It is noted that whilst sales volumes and footfall were high at the start of 2011, the UK economy entered a double dip recession in the latter months of 2011 and the retail market has since continued to decline. The significant reduction in Government spending is also

¹ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012

² 'National Retail Barometer: Summer 2013', Colliers, August 2013



impacting on economic growth, and the UK unemployment rate was recorded at 7.7% in September 2013.

- 2.04 These factors have had a significant impact on the public's general confidence, thereby reducing their propensity to spend their earnings on retail goods. Since 2010 there have also been increases in taxation (for example in VAT, national insurance contributions and capital gains tax) which also impact upon households' spending. Furthermore, inflation has risen to a level beyond average earnings growth and, at the time of reporting, the national inflation rate is 2.7% (August 2013). The delay in reviewing business rates is also identified by Portas³ as a key factor affecting the success of many operators.
- 2.05 The current economic conditions are resulting in significant structural changes to the high street, whereby the pressure on retailers to remain solvent has meant that many are showing increased signs of caution in investment decisions. In particular, retailers are rationalising their physical store portfolios by reducing their number of stores, abandoning their representation in weaker centres and concentrating on acquiring sites in city centres and major regional shopping centres. These steps have been taken by many well-known high street operators (including Optical Express which announced the closure of 40 stores in October 2012 and Thorntons which announced plans to close 180 stores in June 2011) and are considered necessary in order for operators to secure their future.
- 2.06 To address this, many retailers are re-negotiating their lease terms with landlords in order to enable them to switch from quarterly rents to monthly agreements, with several high street firms (including Monsoon and New Look) trying to ease the cash flow burden of paying rent three months in advance. Furthermore, some retailers are finding it increasingly difficult to justify being represented in every town in the UK and in less profitable markets. As a consequence, demand has reduced considerably for 'poorer quality premises' in secondary locations and in many smaller towns with a commensurate drop in value (and often rent). Large cities and towns are likely to suffer less compared to smaller centres, given that they provide an enhanced choice for customers and offer the greater retail and leisure 'experience' that consumers increasingly desire.
- 2.07 In summary, there has been a marked polarisation and divergence in retailer spending, characterised by diminishing demand for secondary premises in smaller peripheral centres and increasing interest

³ 'The Portas Review', December 2011



for well located and appropriately configured floorspace in key centres. It is evident that whilst Central London, regional city centres and regional shopping malls are relatively stable, a significant number of small and medium sized towns which serve a localised catchment may need to implement innovative ideas in order to compete for expenditure and reduce trade leakage.

- 2.08 In terms of prime retail rental values, Colliers⁴ notes that national rates fell by an average of -0.9% in 2011 and by a further -1.2% in 2012, with the average national prime retail rent now being £110 per sq.ft. Colliers also reports that there is a marked regional variation in terms of changes in rental rates, with London the only region to achieve rental growth over the 12 months to June 2012. In contrast, several other regions experienced significant reductions in their average prime rental values during the 12 month period to June 2012, notably Wales (-8.4%), the East Midlands (-5.7%), West Midlands (-3.7%) and the North West (-2.1%). Whilst prime retail rents in Yorkshire and the Humber proved to be more resilient than in these regions, Colliers still reported a -1.8% reduction in such rents across Yorkshire and the Humber in the 12 month period to June 2012.
- 2.09 Given current spending patterns and the wider uncertain economic climate, it is unsurprising that Experian, which monitors and forecasts retail consumer expenditure in the UK, has reviewed its forecast growth rates for both convenience and comparison goods expenditure in recent years. Experian's⁵ forecast annual per capita convenience goods growth rate is now -0.6% at 2013, -0.3% at 2014 and +0.1% at 2015. However, forecast annual per capita comparison goods growth rates are slightly more positive than in the recent years and are similar to those recorded prior to the recession, with growth of +3.2% forecast at 2013, +2.3% at 2014 and +2.8% at 2015. Whilst this is encouraging, it is evident that the forecast convenience goods growth rates are still well below the annual growth rates which were recorded prior to the economic downturn. In this regard, we note that, in 2009, Experian⁶ forecast that per capita convenience goods growth would equate to +1.1% per annum between 2013 and 2015.
- 2.10 It has been widely reported that a number of high street retailers suffered poor trading figures during 2009 and 2010, resulting in many operators going into administration. Indeed, despite heavy discounting over the 2008 festive period and the reduction in VAT from 17.5% to 15.0% until January 2010, a significant number of 'big name' retailers went into administration in 2008 and 2009, including

⁴ Ibid

⁵ Experian Retail Planner Briefing Note 11 (Figure 1a), October 2013

⁶ Experian Retail Planner Briefing Note 6.1 (Table 3.2), October 2008



Woolworths, Adams and Zavvi. Whilst retail administrations fell considerably in 2010, a further number of high street brands were affected in that year including Envy, Ethel Austin, Habitat, Faith Shoes and Suits You. In the first five months of 2012, 30 retailers had gone into administration affecting 3,000 stores, including Blacks Leisure (300 stores), GAME (333 stores) and Peacocks (550 stores). In the second quarter of 2012, Clinton Cards went into administration, though 397 stores were subsequently purchased by Lakeshore, a subsidiary of supplier American Greetings. JJB Sports also fell into administration in September 2012, and whilst 20 of the stores were sold to Sports Direct, the remaining 133 units have closed. In April 2013, HMV was rescued as part of a £50m deal which allowed 131 out of a total of 223 stores to remain open.

2.11 The Retail Futures 2018 report identifies that, between 2008 and 2012, 202 large and medium-scale retailers, which collectively employed approximately 184,000 staff, went into administration⁷. The report, which utilises Centre for Retail Research data, indicates that the number of retail businesses which have entered administration in recent years is significantly greater than that recorded before the start of the recession. We present Table 3 of the Retail Futures 2018 report below as our Table 2.1.

2.12 Table 2.1 indicates that in the three years prior to the 2008 recession, between 16 and 25 medium to large retail businesses entered administration annually. In more recent years, this figure has been as high as 54 (in both 2008 and 2012), and a significant number of businesses had also entered administration in the early part of 2013.

⁷ 'Retail Futures 2018', Centre for Retail Research, May 2013



Table 2.1: Business Failures Amongst Large and Medium-Sized Retailers

Year	Companies Failing	Stores Affected	Employees Affected
2013 (to end March)	23	1,819	18,044
2012	54	3,951	48,142
2011	31	2,469	24,025
2010	26	944	10,930
2009	37	6,536	26,688
2008	54	5,793	74,539
2007	25	2,600	14,083
2006	22	1,370	9,257
2005	16	1,221	7,926

Source: Extracted from Retail Futures 2018 report, based on Centre for Retail Research data

- 2.13 The Retail Futures 2018 report also predicts that overall store numbers are expected to fall by 61,930 (-22.0%) between 2012 and 2018, with non-food stores principally affected. The report estimates that 316,000 people will become unemployed as a result of these store closures.
- 2.14 Despite the difficulties outlined above and the general decline in the comparison goods sector, other specific types of goods continue to perform well. The market for recreational goods has, on the whole, 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. However, the manner in which such purchases are made has changed considerably, with the increasing popularity of the internet to purchase books and music having a notable impact on the composition of town centres, with such stores all but disappearing from the high street. Other businesses have experienced growth in the last two years, with a +12.4% increase (over 1,100 stores) in 'value-related retailing' outlets, including second-hand, discount and charity shops. The Grimsey Review also makes reference to the expansion of pawnbrokers, pay-day lenders and betting shops which have collectively experienced a 17% growth in the number of outlets since 2011.

Trends in Comparison Goods Shopping

- 2.15 Whilst it is not anticipated that growth in retail spending over the next ten years will mirror that achieved after the turn of the millennium, there is expected to be some growth in comparison goods expenditure in coming years. Consequently, there is an increasing focus from retailers on achieving more efficient use of their floorspace, particularly given the recent poor performance of certain national multiples, many of which have been affected by the significant increase in e-tailing and increases in rental levels secured before 2008. As a result of the current economic climate, 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 plates enable operators to provide a greater range of goods; for example, in 2011, Primark opened one million sq.ft of new retail space.

- 2.16 International market conditions and price deflation in some key sectors have also meant that many high street names are becoming increasingly vulnerable to takeover. This is being pursued through disposals, company voluntary administrations (CVAs), informal arrangements with landlords, lease expiries and break options. More generally, whilst there is likely to be continued demand for larger, modern retail units in the future, 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. Many national retailers, who would have previously considered smaller/lower order centres in order to increase their market share, are now assessing their future strategies given the ongoing downturn in the economy. Consequently, many investment decisions will be influenced by the scale of commitment from other retailers; developers will increasingly need to promote large town centre redevelopment schemes if they are to attract high quality retailers.

Trends in Food Retailing

- 2.17 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 PPS4 and subsequently the NPPF) 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 wide range of retail models, 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.



- 2.18 Mintel⁸ identifies that the recession – allied with a period of higher inflation – has had an 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 shoppers are assessing whether purchases represent value for money. Shoppers now realise that they are able to ‘trade down’ and switch to own-label ranges to save money without sacrificing on quality. Indeed, customers are mixing value and premium in the same basket. It is noted that as weekly food budgets fall and consumers alter their shopping habits, growth will be limited and the battle for market share will intensify further. Winning a share of consumer spend will require more than low prices, with shoppers increasingly seeking to source high-quality, good value food.
- 2.19 The changing UK demographics are also having a major impact on the food and grocery sector. For example, there has been a rise in single occupancy young professional households who are ‘time poor’ and relatively ‘cash rich’. Though their baskets might be small, they tend to buy higher value items, therefore providing an opportunity to boost volume and value growth. Elsewhere, an ageing population profile is leading to a rise in time rich consumers who are likely to make more frequent small trips rather than do large weekly shops. The contrasting requirements of these markets means that retailers are seeking to open a variety of stores with a particular current focus on small convenience stores.
- 2.20 Verdict⁹ estimates that the food and grocery sector was worth £136.0 billion in 2013, equating to an annual growth of 3.2%, representing 43.7% of total retail spend. The four key supermarket chains in the UK have respective market shares of 28.7% (Tesco), 15.9% (Asda), 15.6% (Sainsbury’s) and 10.1% (Morrisons). National multiple retailers, including the Co-operative Food (5.1%), Waitrose (4.0%) and Aldi (3.6%), represent a total grocery market share of 90.8%.
- 2.21 More recently, there has been a slowdown in the growth plans of the majority of the principal supermarket operators. Tesco, for example, indicated in April 2013 that it would scrap plans for 100 major store developments and would instead focus on developing medium size units. It is also in the process of investing around £1 billion on improving its current stores and adding new elements, including bakeries and restaurants (notably the Giraffe chain which it purchased in March 2013) which, it hopes, will make the store environment more attractive and encourage shoppers to spend

⁸ ‘Food & Drink Retailing’, Mintel, March 2013

⁹ ‘UK Food & Grocery – Verdict Sector Report’, Verdict, October 2013



more time and money there. Asda is the second largest supermarket retailer in the UK, with more than 550 stores nationwide. In 2011, Asda opened 22 new stores and acquired 193 Netto stores which allowed the company to increase its smaller store portfolio. However, as a result of Competition Commission laws, it was later required to sell 47 of the stores to other retailers, including Morrisons. Asda has recently focused investment on its smallest store formats (known as Asda Supermarket), with the company having aspirations to deliver 250 such stores by 2015. Morrisons intend to deliver 2.5 million sq.ft of new retail floorspace by 2013/2014, both through the continued development of large foodstore schemes and the new small scale M-Local convenience format store. Due to the success of the initial trials, Morrisons now intend to open 50 additional M-Local stores by 2013/2014. The discount supermarket chain Aldi made a pre-tax profit of £57.8m in 2011, when it opened 29 new UK stores. It is currently seeking to develop a further 40 stores by the end of 2013, thus bringing its total number of UK stores to over 500.

- 2.22 The role of supermarkets also continues to develop, with the large operators now offering a greater diversity of goods and services, via a larger number of formats and locations. Food and non-food sales are also increasingly being driven by large supermarket growth, with half of town centres now competing with five or more supermarkets within a two mile radius¹⁰. Whilst the exact impacts which will arise from the opening of a new supermarket are dependent on local circumstances, BCSC notes that there has been a significant decline in the number of independent food retailers over recent years, including a reduction of 45% between 1996 and 2007 in the number of greengrocers. Over the same time period the market share of total retail sales secured by supermarkets has increased from 38% to 42%.

Leisure Sector

- 2.23 The daytime and evening leisure sector has undergone a major shift in the last five years, with the reduction in the income levels of consumers having an impact on their ability to spend on these types of discretionary activities and items. Mintel calculated that the total UK leisure market was worth almost £70 billion in 2012, only 0.2% higher than in 2007¹¹. A review of the leisure activity participation and frequency levels indicates that eating and drinking out of the home still remain the most popular activities which people do on a monthly basis, with the cinema the next most popular of the non-food and drink-led activities. Other activities, including going to a theatre, doing tenpin bowling and visiting a zoo are, on average, undertaken less frequently and this reflects their greater

¹⁰ 'What Does the Future Hold for Town Centres?', BCSC, September 2011

¹¹ 'Leisure Review', Mintel, December 2012



average cost. It is expected that the difficult trading conditions for the leisure sector are set to continue for several more years as a result of the shortfall in the amount of money that consumers have available to spend.

- 2.24 The number of leisure centres and swimming pools has increased in the past five years and whilst there has been a demand on public finances due to budget constraints and in some cases Council's have had to scale back services, Mintel notes that 38% of adults currently use a health centre or swimming pool¹². In addition, the health and fitness private sector had a market value of approximately £3.9 billion¹³ in March 2012, an increase of 1.5% over the previous twelve month period. Mintel note that whilst only 15% of adults currently use a private health and fitness club, the potential for a further expansion of the market remains strong. The health and fitness sector is dominated by the David Lloyd Leisure and Virgin Active operators with these two health clubs having approximately 455,000 and 435,000 members¹⁴. There has also been a rapid growth in the number of the no-contract budget club operators, with Pure Gym (260,000 members) and The Gym (255,000 members) ranked fourth and fifth in the list of leading chains behind DW Sports Fitness which has 275,000 members. Mintel identifies that there has been a growth in the popularity of innovative exercise classes and technological features to attract additional people to these clubs, with many of the higher end clubs also adding spa facilities to their offer.
- 2.25 In terms of other leisure activities, the cinema sector is performing well, with the most recent data indicating that there were 173 million UK cinema admissions in 2012, an increase of 0.5% since 2011. The eating out market has grown by around 8% over the 2008-13 period to an estimated £32.1 billion. It recognises however that this has largely been driven by inflation, with consumer demand muted by the ongoing low consumer confidence levels¹⁵. Mintel also record¹⁶ that 31% of respondents to their survey in September 2012 identified that they visited the cinema 'monthly or more often,' followed by 14% going to a nightclub, 12% visiting a museum, gallery or exhibition, 9% going to the theatre and 7% going tenpin bowling.

¹² 'Leisure Centres and Swimming Pools', Mintel, January 2013

¹³ 'State of the UK Fitness Industry', The Leisure Database Company, June 2013

¹⁴ 'Health and Fitness Clubs', Mintel, June 2013

¹⁵ 'Eating Out Review', Mintel, June 2013

¹⁶ 'Leisure Review', Mintel, December 2012



Out of Centre

- 2.26 Despite the 'town centre first' planning policies which have been adopted by recent Governments, research undertaken by Verdict¹⁷ indicates that between 2007 and 2012, the amount of out of centre floorspace increased by 23%. However, in very recent years, Colliers notes that the demand for out of centre representation has been limited, with those retailers seeking to acquire stores having a pick of vacant stock which has been made available through the administration of MFI (in November 2008), Land of Leather (in January 2009) and Focus DIY (in May 2011), amongst others. However, only five retailers with any significant out-of-town presence have failed since June 2011, these being Allied Carpets, Clintons, Comet, GAME and Peacocks.
- 2.27 The national average vacancy rate in out of centre retail warehouses in 2012 was 3.9%, an increase of 0.3% since 2011. Some of the voids created by the administrations remain un-let and the flooding of the market with so much unwanted space has acted to reduce rents. Retailers who have had their pick of the best stores include Dunelm, Pets at Home, Dreams, Matalan, Dixons Group, Go Outdoors, B&M, Mothercare, Next Home and TK Maxx.
- 2.28 Looking forward, Colliers indicates that whilst out of centre locations have witnessed low levels of development during the last two years, it is estimated that one million sq.ft of new space was completed in 2012. There are also an increasing number of retailers acquiring larger stores, including several department-store type format operators including John Lewis Home, M&S and Primark. The large out of centre Oakgate scheme which was approved by the City of York Council in May 2012, for example, will accommodate M&S, John Lewis and Next stores and is due to open in March 2014.

Shopping Centre Development

- 2.29 It is evident that shopping centre retail development is currently at a virtual standstill and that little activity is anticipated over the next few years. Colliers suggests that the UK will never see a return to the level of shopping centre openings that was evident in recent times. Whilst the Trinity development in Leeds City Centre opened in March 2013 with 90% of the units pre-let, it is the only major retail development which is due to open in the UK in 2013. In contrast to the average level of completions over the last five years (3.9 million sq.ft per annum), this level of shopping centre development is by comparison very modest. In 2008, for example, almost 8 million sq.ft of new floorspace opened across 14 new schemes nationwide.

¹⁷ 'UK Out of Town Retailing', Verdict Datamonitor, April 2012



- 2.30 The viability of shopping centre retail development remains challenging no matter how well designed or well located a scheme is. There are three types of scheme which have a better chance of success in the current economic climate. The first of these will be where a town has a large, affluent catchment and an acknowledged undersupply of retail floorspace in both town centre and out-of-town locations. The second scenario relates to schemes which were very close to happening before the recession took hold, which may be revised to better meet the current needs of the market. Barnsley, Macclesfield, Bradford and Lichfield are examples of such schemes. The third opportunity relates to development where the key anchor is a foodstore and, as a result, demand remains strong.
- 2.31 Proposed schemes which will conform to one of these models are considered to be few and far between, and for development to begin again in earnest, it will be necessary for improvements in retailer demand, a strengthening of rental levels, further improvement in the investment market and, critically, the availability of finance at viable levels to occur. For those towns without an oversupply of floorspace and with sites which can be brought forward without excessive levels of cost, some development may be able to be brought forward within the next five years. However, such opportunities may be the exception rather than the rule.
- 2.32 In addition to their retail offer, consumers are increasingly travelling to larger centres for their overall experience and to use the leisure facilities. Colliers notes that the largest destinations draw from a wide catchment, hence the need to retain consumers for as long as possible. In the past, it was recognised that non-retail uses typically occupied less than 10% of the space, though this has increased in recent schemes, including Westfield in Stratford where catering and leisure units occupy over 20% of the space.

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

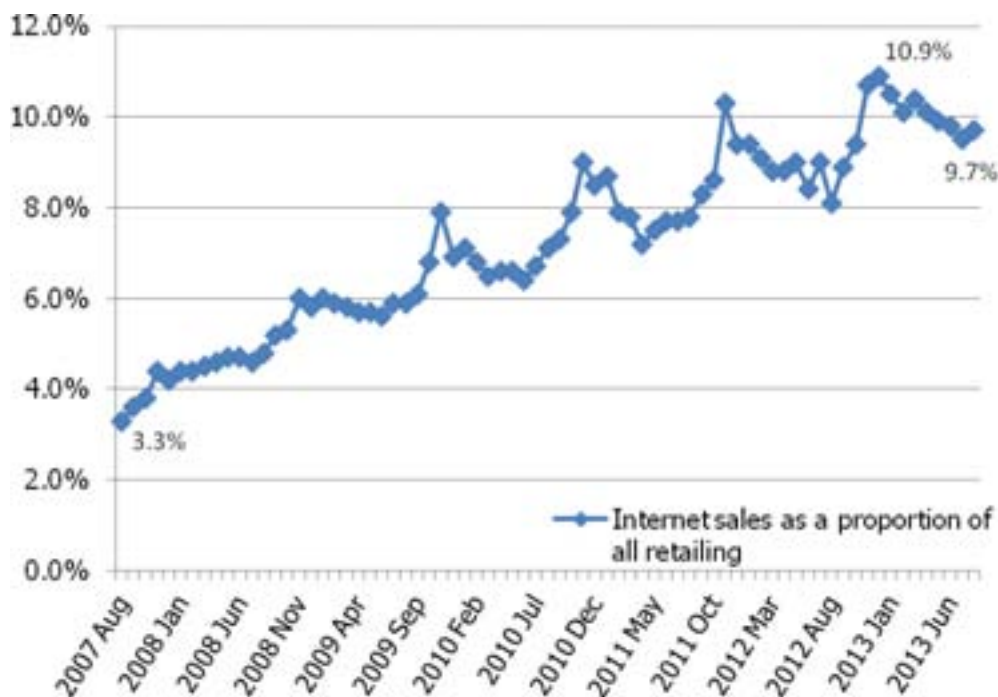
- 2.33 Many consumers who previously shopped in town centres and at retail parks are now using the internet for some of their purchases. It is estimated that internet sales accounted for 9.7% of all UK retail spending at August 2013¹⁸ and this trend is set to continue. Mintel estimate that e-commerce sales in the UK was £28.9 billion in 2012, with store-based retailers accounting for 54% of online retail sales¹⁹.

¹⁸ 'Retail Sales', Office for National Statistics, August 2013

¹⁹ 'E-Commerce', Mintel, July 2013

2.34 The rise in recent years of e-commerce has had a major impact upon retailers, developers and investors alike, with the top 10 e-retailers in 2012 including Amazon UK (16%), Shop Direct (5%), and Next (4%)²⁰. As access to the internet/online shopping continues to grow through digital televisions, tablets and mobile phones, proportionally less money is anticipated to be spent on the high street or at retail parks.

Figure 2.1: Internet Sales as a Proportion of All Retailing



Source: 'Retail Sales,' Office for National Statistics, August 2013

2.35 The growth in internet as a sales medium has been enabled by the increase in access to the internet by households, which has reportedly²¹ risen from 57% at 2006, to 77% at 2011, 80% at 2012 and 83% in 2013. A total of 21 million households in Great Britain now have internet access, an increase of 7.1 million since 2006. In addition, the proportion of households with access to the internet is expected to increase further over the coming years, alongside the growth in mobile phone and tablets with access via the new 4G spectrum. The ONS states that access to the internet using a mobile phone more than doubled between 2010 and 2013, from 24% to 53%. This has supported the strong growth recorded, together with improved consumer confidence in the security of online payment,

²⁰ Ibid

²¹ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013



deliveries and heavy demand for expensive electrical products available online. The option of using the internet to 'click and collect' in-store at a dedicated counter is also increasing in popularity (particularly within stores with large sales areas), with the service now accounting for around a fifth of John Lewis internet orders.

- 2.36 Online spending continues to be the key growth opportunity for national and independent retailers, accounting for increasing proportions of total sales. For example, online sales at Next in 2011 accounted for 44% of operating profit and 32% of group sales. With regard to foodstore operators, food accounts for 20.5% of all internet sales, which equates to 3.1% of all food retailing²². Verdict's research identifies that, with the exception of Morrisons (though it is currently in the process of establishing an online presence via Ocado), major retailers have seen their business grow as online shopping has increased and, as a result, the likes of Asda and Sainsbury's have improved their geographical coverage and capacity. In particular, online sales at Tesco currently exceed £2 billion, with Colliers noting that the operator has a reported 48% online grocery market share.
- 2.37 In further support of this, Office for National Statistics (ONS) data²³ indicates that the number of people using the internet to purchase goods continues to rise, with 72% of the UK population purchasing products over the internet in 2013, compared to 53% in 2008. The most popular online purchases were clothes/sports goods, with 47% of internet users buying these items. In addition, 44% of users bought household goods and 21% bought food or groceries. Additional research conducted by the Interactive Media in Retail Group (IMRG) and analysts Capgemini²⁴ indicates that British shoppers spent £5.8 billion online in August 2012, a year-on-year growth of 11%. IMRG also states that all key retail sectors experienced improvements in sales between July 2011 and July 2012, particularly in the health and beauty (+30%), electrical (+30%) and gifts (+27%) sectors.
- 2.38 It is evident that internet shopping as a whole 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. However, it will be difficult to understand the true impact as the current economic downturn is also having a significant impact on rental levels. Having said that, it would appear that smaller town centres (which may be less able to offer a complete 'shopping experience') are likely to be the subject of greater impacts from online retailing.

²² 'Shop Expansion and the Internet', CBRE, May 2012

²³ 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2013

²⁴ 'IMRG Capgemini E-retail Sales Index', September 2012



2.39 Despite some variance in the estimated future growth of online shopping, it is clear that e-tailing will not replace the 'shopping experience' as shopping is a social activity. In this regard, retailers are already adopting innovative approaches to encourage people to visit their store through 'try before you buy' concepts. For example, Ellis Bingham has installed Vertical Chill indoor ice climbing walls at five stores for customers to try equipment and to interact with products. 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. Those retailers who are likely to have a healthy future are those who are able to combine a strong high street presence with an interesting and closely related e-tail offer.



3.0 Planning Policy Context

Introduction

- 3.01 Given that this Study seeks to provide important evidence to assist in the production of future retail planning policy, it is important to review existing national planning policy of pertinence to retail and town centre matters to explore the context for the Study and how it may impact upon the production of the Local Development Framework.

National Planning Policy Framework

- 3.02 The National Planning Policy Framework (NPPF) was published on 27th March 2012. The Framework replaces all former Planning Policy Statements, Planning Policy Guidance Notes and some Circulars with this single consolidated document. While the NPPF supersedes PPS4, the associated Practice Guidance on Need, Impact and the Sequential Approach has not been withdrawn and remains a material consideration.
- 3.03 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.
- 3.04 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.
- 3.05 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should do everything it can to support sustainable economic growth.
- 3.06 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.



3.07 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.08 Paragraph 23 also indicates that needs for retail, leisure, office and other main town centre uses should be met in full and should not be compromised by limited site availability.



- 3.09 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.
- 3.10 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq.m. We consider the need for a local impact threshold in providing our recommendations in respect of the Council's future retail strategy at Section 5 of this report.
- 3.11 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.
- 3.12 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

Planning for Town Centres: Practice Guidance on Need, Impact and the Sequential Approach

- 3.13 The Practice Guidance also confirms that an up-to-date assessment of the need for additional or replacement floorspace to accommodate town centre uses is a fundamental component of the evidence base to underpin policy making. Paragraph 3.2 indicates that both quantitative and qualitative need will have a role to play in reaching an overall judgement about the scale and form of development which should be planned for and facilitated through development plans. Quantitative need is identified as being that which arises as a result of forecast expenditure growth (either through population growth or increases in spending), or by imbalance between the existing facilities and the current level of available expenditure in an area. Qualitative need includes that which is related to customer choice, the appropriate distribution of facilities and the needs of those living in deprived areas.



3.14 Paragraph 3.4 of the Practice Guidance sets out the five key stages which will underpin an assessment of quantitative retail need, these being:

- the definition of the catchment/Study Area;
- the assessment of current/future spend;
- the assessment of current shopping patterns and market shares;
- the comparison of current and forecast turnover with existing floorspace; and
- the identification of future expenditure capacity and need for new floorspace.

The Portas Review - An Independent Review Into the Future of Our High Streets

3.15 The Portas Review (December 2011) is an independent review undertaken by Mary Portas into the state of Britain's high streets and town centres. The review considers the reasons why retail spending on the high street is falling, why there has been a decline of Britain's high streets, and the benefits that can be brought about through the protection of Britain's high streets. Portas puts forward 28 recommendations which include actions that Government, businesses and other organisations should take in order to create diverse, sustainable high streets where retailers can thrive.

3.16 The Government released a response to the Portas Review in March 2012. The response acknowledges that in response to the challenges facing the high street, namely out-of-centre retail development and online retailing, the high street will have to offer something new and different in order to create a diverse and competitive environment. In its response, the Government accepts a number of recommendations put forward in the Portas Review, including: the implementation of Town Teams (described as visionary, strategic and strong operational management teams for high streets); the provision of funding for pilot areas who are judged to have the best ideas for improving their town centres and high streets; investing in Business Improvement Districts; and support for a new National Market Day. The Government's response seeks to encourage areas to think creatively about how their town centres can be enhanced in order to entice people back, including improvements which could be secured through the redesign of high streets, and the promotion of the evening and night time economy.



4.0 Original Market Research

Introduction

- 4.01 The undertaking of original market research enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail floorspace across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.
- 4.02 A key requirement of this Study is the detailed understanding of shopping patterns in terms of the use of town centres and the identification of the centres' catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify consumers' habits and preferences in the Study Area.

Study Area

- 4.03 In March 2013, a survey of 1,000 households was undertaken with the defined Study Area which comprises ten separate zones and which is broadly reflective of the Kirklees authority boundary. However, as it is accepted that adjacent and accessible parts of Bradford, Calderdale, Leeds and Wakefield authority areas may look to Kirklees to meet some of their shopping needs, the Study Area extends beyond the Kirklees authority boundary to the north, west and east.
- 4.04 The defined catchment has been broken down into ten survey zones on a geographic basis, in a manner which seeks to allow for the consideration of shopping patterns particular to each of the District's six town centres²⁵. Zone 1 is focused around Huddersfield town centre, Zone 4 contains Cleckheaton and Heckmondwike, Zone 7 contains Holmfirth, Zone 8 contains Dewsbury, and Zone 9 contains Batley. The zones were defined according to postcode sector geography to assist in the collection of data for the purposes of a telephone based household survey, rather than necessarily representing the shopping catchment areas of the respective town centres. It should be noted that the zones which we adopted for the survey differ somewhat from those utilised in the previous Kirklees Retail Study (which were defined to inform a larger survey of 1,500 respondents).

²⁵ These being Batley, Cleckheaton, Dewsbury, Heckmondwike, Holmfirth and Huddersfield



4.05 The questions and full tabulation of results from the household survey are provided at Appendix 1. Table 4.1 below sets out the postcode sectors which comprise each zone and a map of the catchment is provided at Appendix 2. Appendix 3 provides detailed maps of the postcode sectors which comprise each zone. Appendix 4 identifies the location of major foodstores and Kirklees' principal retail parks to assist in the interpretation of the analysis which follows.

Table 4.1: Postcodes by Survey Zone

Survey Zone	Postcode Sectors
Zone 1	HD 1 1, HD 1 2, HD 1 3, HD 1 4, HD 1 5, HD 1 6, HD 4 5, HD 4 6, HD 4 7
Zone 2	HD 2 1, HD 2 2, HD 5 0, HD 5 8, HD 5 9
Zone 3	HD 6 1, HD 6 2, HD 6 3, HD 6 4, HX 4 0, HX 4 8, HX 4 9, HX 5 0, HX 5 9
Zone 4	BD19 3, BD19 4, BD19 5, BD19 6, WF14 0, WF14 8, WF14 9, WF15 6, WF15 7, WF15 8, WF16 0, WF16 9
Zone 5	HD 3 3, HD 3 4, HD 7 4, HD 7 5, HD 7 6
Zone 6	HD 8 0, HD 8 8, HD 8 9, WF 4 4
Zone 7	HD 9 1, HD 9 2, HD 9 3, HD 9 4, HD 9 5, HD 9 6, HD 9 7
Zone 8	WF12 0, WF12 7, WF12 8, WF12 9, WF13 1, WF13 2, WF13 3, WF13 4
Zone 9	WF17 0, WF17 5, WF17 6, WF17 7, WF17 8, WF17 9
Zone 10	BD 4 0, BD 4 6, BD 4 9, BD11 1, BD11 2, BD12 0, BD12 7, BD12 8, BD12 9, LS27 0, LS27 7, LS27 8, LS27 9, WF 2 0, WF 3 1, WF 3 2, WF 5 0, WF 5 8, WF 5 9

4.06 The results of the household survey are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 7 of this report.

4.07 The household survey is also of assistance in identifying broad shopping patterns, including the frequency of visit, the incidence of linked trips, the most popular means of accessing town centre facilities, the use of other town centre facilities, and so on. It should be noted that the commentary which follows in this section is based on the analysis of shopping trips undertaken, without any specific regard to the level of expenditure which may have occurred during a trip. Due to there being significant differences between the zones defined for this Study and those utilised previously, an assessment of changes in shopper behaviour since 2008 on a zone by zone basis is not possible. We instead provide some general commentary in terms of identified changes in overall shopping patterns since 2008 throughout this section.

Food Shopping Patterns

4.08 Tables 4.2 and 4.3 summarise the proportion of main food and 'top up' food shopping trips which are directed to retailers located within Kirklees District, based upon the results of the household survey.



- 4.09 Table 4.2 indicates that convenience stores within Kirklees District claim a market share of 66.6% of all main food shopping trips which originate from inside the Study Area. In terms of top up food shopping, Table 4.3 indicates that a greater market share of 70.2% of trips is claimed by stores located within the District. It is to be expected that there is a higher market share secured by facilities within the District for top up shopping as such expenditure is typically undertaken close to home.
- 4.10 As would also be expected, the food shopping market share of facilities within Kirklees is generally greatest in the 'core' zones clustered around Huddersfield (comprising Zones 1, 2, 5 and 7). Each of these zones provides good accessibility to a range of main food shopping facilities and, as a consequence, on each occasion at least 85% of main food shopping trips which originate within that zone are directed to destinations within Kirklees. Very nearly all main food shopping trips which originate within Zones 1 and 2 are retained within the District.
- 4.11 The zones for which Kirklees has a significantly lower market share are those at the periphery of the Study Area which, in the case of Zones 3 and 10, are located predominantly outside the Kirklees administrative boundary. As a consequence, Zones 3 and 10 principally look towards food provision in neighbouring authority areas to satisfy needs and Kirklees facilities respectively claim just 22.7% and 13.5% of main food shopping trips which originate from within these zones. Zone 6 also incorporates a significant area which lies outside of Kirklees District, which obviously impacts upon the proportion of residents' expenditure which is directed towards retailers that are located within the authority boundary.
- 4.12 Overall, both the main food shopping and top up shopping market shares secured in zones located within Kirklees are considered to be good, with a high proportion of main food shopping trips undertaken by the District's population being retained within the District.

Table 4.2: Main Food Shopping Trips Analysis by Zone (%)

	1	2	3	4	5	6	7	8	9	10	Total
Market Share	98.7	98.1	22.7	85.0	92.7	68.6	90.7	92.1	72.4	13.5	66.6

Source: Table 3, Appendix 7

Table 4.3: Top Up Food Shopping Trips Analysis by Zone (%)

	1	2	3	4	5	6	7	8	9	10	Total
Market Share	97.1	96.5	6.7	92.7	100.0	93.2	97.2	91.0	93.1	13.9	70.2

Source: Table 3, Appendix 7



- 4.13 When we 'drill down' to examine the distribution of main food shopping trips across the District²⁶, it is evident that not only is Huddersfield the single most popular destination to undertake such trips, but that it also has the most extensive catchment, securing nearly three out of every ten main food shopping trips in Zones 1, 2, 5 and 7. This is considered a consequence not only of Huddersfield's central location which affords accessibility to a number of zones, but also of its role as an employment provider which results in commuters accessing food shopping facilities on their return home from work. Huddersfield claims a total of 16.7% of all main food shopping trips which originate within the Study Area. Further main food shopping trips undertaken in the wider area are directed to the Asda at Longhill Road and to the Morrisons at Penistone Road, which are located some distance from Huddersfield town centre and which we have categorised as 'Other Kirklees'.
- 4.14 Dewsbury, Batley and Heckmondwike are each the most popular main food shopping destination within the zones that form their immediate catchment (Zone 8, Zone 9 and Zone 4 respectively). Whilst each of these centres has some influence over a wider area, it is evident that their food shopping appeal is principally a localised one. Dewsbury attracts 9.3% of all main food shopping trips which originate within Kirklees, whilst both Batley and Heckmondwike each claim 7.1%.
- 4.15 Cleckheaton and Holmfirth have a relatively localised appeal, with Heckmondwike attracting 1.8% of all main food shopping trips (the vast majority of which originate from Zone 4) and Holmfirth attracting 0.3% of all such trips (all of which originate from Zone 7). The origin of each centre's main food shopping trade is set out below at Table 4.4.

²⁶ In examining the market share of destinations for main food shopping and for all subsequent goods categories, we have defined each of the six towns on the basis of the defined town centre, all edge of centre locations, and those retail parks and other out of centre locations which form part of the town's wider offer. Accordingly, there are some retail destinations with a Huddersfield address (the Asda at Longhill Road to the north of Huddersfield being one) which we consider to have no real relationship with Huddersfield town centre and which, for food retailing at least, have a somewhat different catchment to the town centre. Expenditure which takes place in such locations has been aggregated in the category 'Other Kirklees' expenditure. The destinations which we have assigned to each one of the six towns are set out in the tables which comprise Appendix 7



Table 4.4: Main Food Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	52.3	29.8	9.9	4.3	47.2	16.0	37.8	1.1	0.0	0.0	16.7
Batley	0.0	0.8	0.0	11.0	0.8	0.0	0.0	10.5	46.7	5.7	7.1
Cleckheaton	0.0	0.0	0.0	10.6	0.0	0.0	0.0	0.0	0.0	2.4	1.8
Dewsbury	0.0	1.0	0.0	8.6	0.0	3.9	0.0	61.4	13.2	2.6	9.3
Heckmondwike	0.0	1.1	0.0	40.7	0.0	0.0	0.0	11.0	9.1	1.9	7.1
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.0	0.0	0.0	0.3
Other Kirklees	46.4	65.4	12.7	9.9	44.7	48.8	47.8	8.2	3.4	0.8	24.4
Total Kirklees	98.7	98.1	22.7	85.0	92.7	68.6	90.7	92.1	72.4	13.5	66.6

Source: Table 3, Appendix 7

4.16 Whilst Huddersfield and the larger towns are still important destinations for top up food shopping, there is less disparity between the performances of the six towns in terms of their propensity to attract top up shopping trips. This is a consequence of top up food shopping being typically undertaken close to home and not generally meriting a 'special trip' to a large food superstore or retail centre. Given that top up shopping takes place in many locations (including small convenience stores, independent specialist retailers, petrol station shops and so on), it is unsurprising that the 'Other Kirklees' stores category attracts a substantially higher proportion of top up shopping trips than it does for main food shopping trips (46.4% for main food shopping, compared to 56.8% for top up shopping). It is particularly notable that Holmfirth attracts a higher proportion of top up shopping trips than main food shopping trips, suggesting that shoppers are poorly served in terms of main food shopping options in the town.

4.17 The origin of each centre's top up shopping trade is set out below at Table 4.5.

Table 4.5: Top Up Food Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	39.1	21.3	1.3	0.0	13.0	15.2	8.4	1.5	0.0	0.0	8.3
Batley	0.0	1.0	0.0	5.1	0.0	0.0	0.0	7.8	48.7	1.5	5.1
Cleckheaton	0.0	0.0	1.3	19.7	0.0	1.0	0.0	0.0	1.5	4.0	3.7
Dewsbury	1.2	3.7	0.0	4.9	0.0	1.1	0.0	50.7	5.2	0.0	6.5
Heckmondwike	0.0	0.0	0.0	25.9	0.0	2.5	0.0	8.3	6.7	1.1	7.1
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	28.9	0.0	0.0	2.4	2.1
Other Kirklees	56.8	70.4	4.1	37.1	87.0	73.4	59.8	22.7	31.0	4.9	39.6
Total Kirklees	97.1	96.5	6.7	92.7	100.0	93.2	97.2	91.0	93.1	13.9	70.2

Source: Table 3, Appendix 7



4.18 From scrutiny of the household survey results, we also note the following convenience goods shopping trends.

- Six stores within Kirklees cumulatively attract very nearly one third of the Study Area main food shopping market share, these being: Morrisons at Penistone Road in Waterloo (7.8%); Sainsbury's at Southgate in Huddersfield (7.6%); Morrisons at Union Street in Heckmondwike (6.7%); Asda at Mill Street in Dewsbury (6.2%); Asda at Longhill Road in Huddersfield; and, Tesco Extra at Bradford Road in Batley (5.5%).
- More than four out of every ten surveyed (40.2%) indicated that the principal reason for choosing their main food shopping destination was its proximity to their home, followed by the fact that the store offers low prices (11.9%) and then due to habit or loyalty to the retailer (10.5%).
- A large majority of shoppers (72.7%) do their main food shop at least once a week, with 12.4% undertaking main food shopping at least once a fortnight and 7.4% doing such shopping on a twice-weekly basis.
- Just 3.4% of respondents suggested that their last main food shop was undertaken via the internet.
- A large majority of respondents use the car in travelling to do their main food shop (85.6%), with the next most popular means of transport being by foot (5.7%) and then by bus (5.4%).
- More than half of respondents (61.1%) do not link their main food shopping trip with any other activity, with the most popular activities of those that do being travelling to and from work (6.8%) and undertaking non-food shopping (6.2%).
- In terms of top up food shopping, given the extensive reach of the Study Area, a very large number of stores have been identified as attracting top up food shopping expenditure. There are five stores within Kirklees which each claim more than 2.0% of Study Area market share for top up food shopping, these being: Tesco at Northgate in Cleckheaton (3.8%); Morrisons at Union Street in Heckmondwike (3.2%); Tesco Extra at Bradford Road in Batley (3.2%); Asda at Mill Street West in Dewsbury (2.7%); Morrisons at Penistone Road in Waterloo (2.3%); and, Sainsbury's at Moorhill Road in Salendine Nook (2.1%).
- As would be expected, the household survey indicates that top up shopping trips tend to be undertaken on a more frequent basis than main food shopping trips, with 7.1% of respondents undertaking such shopping trips on a daily basis, 40.1% at least twice weekly, 36.8% at least weekly and 8.8% at least fortnightly.



Comparison Goods Shopping Patterns: Clothing

- 4.19 As Table 4.6 demonstrates, Huddersfield is the single most population destination for clothes shopping in the Study Area, attracting 28.3% of all such trips, and more than half of all such trips which originate in Zones 1, 2, 5 and 7. The attraction of Huddersfield falls substantially in zones to the north of the Study Area, including Zones 4, 8, 9 and 10, which offer greater access to alternative facilities in Bradford, Leeds and Wakefield. In Zones 4 and 8, Huddersfield is the destination for less than one in every ten trips made to undertake clothes shopping, and no such trips to Huddersfield originating in Zones 9 and 10 were recorded.
- 4.20 In Zone 8, a large proportion (31.9%) of clothes shopping trips are directed to Dewsbury and, in Zone 9, both Dewsbury (12.4%) and Batley (16.5%) attract a significant market share of such trips. However, it is evident that both Dewsbury and, in particular, Batley have localised clothes shopping catchments, with very limited penetration across the wider Study Area. Cleckheaton, Holmfirth and Heckmondwike all have a very limited clothes shopping role with each attracting less than 1.0% of all clothes shopping trips which originate within the Study Area.
- 4.21 Whilst Huddersfield appears to be able to fulfil many of the clothes shopping needs of residents of central and southern parts of Kirklees, those living in the north of Study Area, in particular, have an abundance of choice in terms of where such purchases are made. Accordingly, as Leeds city centre, Wakefield city centre and the White Rose shopping centre each attract a significant number of trips which originate from within the Study Area; as a consequence, as Table 4.6 identifies, just under half of clothes shopping trips originating within the Study Area are directed to facilities in Kirklees District.

Table 4.6: Clothing and Footwear Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	63.0	74.6	25.2	8.6	66.9	42.8	51.7	4.5	0.0	0.0	28.3
Batley	1.2	0.0	0.0	6.2	0.0	0.0	0.0	5.7	16.5	4.1	3.5
Cleckheaton	0.0	0.0	0.8	2.7	0.0	0.0	0.0	0.0	0.0	1.0	0.6
Dewsbury	0.0	2.4	0.8	7.9	2.2	4.3	0.0	31.9	12.4	1.8	6.3
Heckmondwike	0.0	0.0	0.0	1.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1
Holmfirth	0.0	0.0	0.0	0.0	1.0	0.0	4.2	0.0	0.0	0.0	0.3
Other Kirklees	7.0	3.7	6.5	12.2	6.3	0.0	1.4	9.4	18.8	3.9	6.7
Total Kirklees	71.2	80.7	33.4	38.6	76.4	47.1	57.3	51.5	47.7	10.8	45.7

Source: Table 11, Appendix 7



Comparison Goods Shopping Patterns: Books, CDs and DVDs

4.22 The household survey records broadly similar shopping patterns in respect of the purchase of books, CDs and DVDs as it does for clothes shopping, albeit with Huddersfield receiving a greater market share of such trips. Indeed, as Table 4.7 demonstrates, nearly four out of every ten such shopping trips which originate within the Study Area are directed to Huddersfield. The popularity of Huddersfield is again more limited in the north of the Study Area, with a less than 5% share of such trips secured in Zones 8, 9 and 10. Dewsbury and Batley secure a reasonably significant market share of trips to purchase such goods, which is attributable to the presence of large food superstore (selling a wide range of goods) in these towns. The two most popular destinations to purchase books, CDs and DVDs outside of the Study Area are White Rose Shopping Centre (attracting 11.0% of all such shopping trips) and Leeds city centre (5.6%).

Table 4.7: Books, CDs and DVDs Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	79.0	88.7	36.1	11.6	62.7	51.6	78.1	4.4	2.2	4.2	38.4
Batley	0.0	0.0	0.0	17.4	0.0	0.0	0.0	3.0	29.9	2.8	4.8
Cleckheaton	0.0	0.0	0.0	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.7
Dewsbury	0.0	2.1	0.0	2.2	0.0	3.2	0.0	49.1	18.0	0.0	7.4
Heckmondwike	0.0	0.0	0.0	4.5	0.0	0.0	0.0	2.6	0.0	0.0	0.8
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	3.2	0.0	0.0	0.0	0.2
Other Kirklees	8.4	4.4	5.5	13.2	18.0	2.9	5.7	0.0	10.9	10.3	8.3
Total Kirklees	87.4	95.2	41.5	54.6	80.8	57.8	87.0	59.0	61.0	17.4	60.6

Source: Table 13, Appendix 7

Comparison Goods Shopping Patterns: Small Household Goods

4.23 Table 4.8 below identifies that Huddersfield attracts 30.0% of shopping trips to purchase small household goods (including such items as tableware, household utensils, jewellery, watches and appliances for personal care) which originate from within the Study Area. Huddersfield again attracts more than half of all such trips which originate in Zones 1, 2, 5 and 7. The other main towns each attract a limited market share of small household goods trips, with a significant share of such journeys directed to destinations elsewhere in Kirklees, most notably to Birstall Shopping Park (which attracts 15.7% of such trips originating from within the Study Area). Other popular destinations to shop for small household goods include large food superstores, which is reflective of the wide household product range typically carried by such stores. Given the number of retailers which now sell a wide range of household goods, the market share claimed by Huddersfield is considered to be encouraging and reflective of the strength of the offer provided by town centre operators, the markets and neighbouring superstores and retail parks.



Table 4.8: Small Household Goods Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	71.1	64.7	23.2	6.1	54.6	45.1	71.1	2.0	0.0	3.5	30.0
Batley	0.0	3.2	0.0	11.7	0.0	4.0	0.0	10.8	21.5	3.5	5.2
Cleckheaton	0.0	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.3
Dewsbury	0.0	1.6	0.0	5.7	0.0	1.4	0.0	36.6	13.2	3.5	5.9
Heckmondwike	0.0	0.0	0.0	8.4	0.0	0.0	0.0	2.9	1.4	0.0	1.5
Holmfirth	0.0	0.0	0.0	0.0	1.8	0.0	2.2	0.0	0.0	0.0	0.3
Other Kirklees	15.8	11.5	14.7	39.0	30.5	5.7	6.3	29.4	27.9	35.2	24.5
Total Kirklees	87.0	81.1	37.9	73.2	86.9	56.2	79.6	81.7	64.0	45.7	67.7

Source: Table 15, Appendix 7

Comparison Goods Shopping Patterns: Toys, Games, Bicycles and Recreation Goods

- 4.24 Table 4.9 identifies that Huddersfield secures around two-thirds of all shopping trips to purchase toys, games, bicycles and similar items (recreational goods) which originate within Zones 1, 2, 5 and 7, but a substantially lesser market share of such trips originating in all other zones. Once again, this is a consequence of the choice which exists elsewhere in Kirklees and at destinations outside of the District, particularly to the north.
- 4.25 Dewsbury attracts a significant proportion of trips to purchase recreational goods which originate in Zones 8 and 9 and claims 5.7 of all such trips originating from within the Study Area. Batley, Holmfirth, Heckmondwike and Cleckheaton each receive a very limited share of such trips, which is reflective of their role catering for the more day-to-day needs of residents. Birstall Shopping Park is the single most popular destination for such trips, securing 24.4 of all such journeys from within the Study Area and more than half of such journeys (51.4%) originating in Zone 4. Outside of Kirklees, a large number of destinations are visited to shop for such items, with the most popular being White Rose Shopping Centre (which secures a 6.7% market share), Wakefield city centre (5.9%) and Leeds city centre (4.0%).



Table 4.9: Toys, Games, Bicycles and Recreation Goods Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	68.1	66.9	19.1	8.5	63.1	40.3	64.2	0.0	0.0	3.0	27.2
Batley	0.0	0.0	0.0	0.0	0.0	0.0	0.0	7.6	11.8	3.0	2.2
Cleckheaton	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Dewsbury	0.0	2.4	0.0	3.8	0.0	2.1	0.0	36.0	20.0	0.0	5.7
Heckmondwike	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.0	0.0	0.0	0.3
Other Kirklees	16.5	20.2	7.1	64.7	25.3	3.1	4.9	20.9	45.2	33.5	28.5
Total Kirklees	84.6	89.6	26.2	78.4	88.4	45.4	74.2	64.5	77.0	39.4	64.2

Source: Table 17, Appendix 7

Comparison Goods Shopping Patterns: Chemist Goods

4.26 Chemist goods are typically purchased in a similar manner to convenience items, with a large proportion of such trips taking place close to home (due principally to the similar nature of many such goods which reduces the propensity to 'shop around'). Accordingly, a wide range of facilities attract such shopping journeys, including the town centres, but also food superstores, local centres and local shopping parades. Accordingly, whilst Huddersfield secures a relatively low market share for this comparison goods category, this is consistent with how such purchases are generally made and does not give particular rise for concern. The overall Kirklees market share of 68.1% is considered to be strong and, again, reflective of the fact that such goods are generally bought locally. Table 4.10 identifies the derivation of chemist goods expenditure which is attracted to each of the six towns.

Table 4.10: Chemist Goods Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	66.7	61.2	9.9	3.1	56.9	43.8	61.9	1.2	0.0	0.9	25.7
Batley	0.0	0.9	0.0	3.2	0.0	0.0	0.0	10.2	40.7	1.5	4.5
Cleckheaton	0.0	0.9	1.0	17.3	0.0	0.0	0.0	0.0	1.0	5.2	3.5
Dewsbury	0.0	1.1	0.0	4.4	0.0	0.0	0.0	59.1	8.9	1.3	7.4
Heckmondwike	0.0	0.0	0.0	19.5	0.0	0.0	0.0	5.8	5.1	1.0	3.5
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	12.8	0.0	0.0	0.1	0.9
Other Kirklees	30.3	29.3	4.7	38.5	40.3	38.4	14.3	8.3	21.6	10.0	22.7
Total Kirklees	96.9	93.3	15.6	86.0	97.2	82.2	89.0	84.5	77.2	20.9	68.1

Source: Table 19, Appendix 7



Comparison Goods Shopping Patterns: Electrical

- 4.27 Huddersfield once again claims a very high market share of shopping trips to purchase electrical goods which originate from within Zones 1, 2, 5 and 7, with more than three-quarters of all such trips being directed to the town in these Zones. Indeed, as Table 4.11 identifies, Huddersfield claims 93.2% of all such trips which originate in Zone 1. The single most popular destination within Huddersfield for electrical goods shopping is Leeds Road Retail Park which attracts 22.1% of all such trips generated from within the catchment.
- 4.28 Dewsbury attracts the majority of electrical goods shopping trips (55.6%) which originate from within Zone 8, but its sphere of influence is limited. Once more, Batley, Cleckheaton, Holmfirth and Heckmondwike have a very limited role in terms of electrical goods shopping, with the latter three of these towns securing an aggregated market share of just 2.3%. However, Kirklees District as a whole is considered to have a very high market share, attracting 73.4% of all shopping trips to purchase such items. This is in part a consequence of the very strong provision apparent at Birstall Shopping Park (which secures a market share of 22.1% of all such expenditure across the Study Area as a whole).

Table 4.11: Electrical Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	93.2	82.2	34.7	18.7	87.5	51.5	77.1	4.8	1.5	0.0	38.1
Batley	0.0	1.6	0.0	3.4	0.0	0.0	0.0	7.3	20.0	3.7	3.6
Cleckheaton	0.0	0.0	0.0	1.1	0.0	0.0	0.0	0.0	0.0	1.4	0.4
Dewsbury	0.0	0.0	0.0	16.5	0.0	1.5	0.0	55.6	4.0	0.0	7.9
Heckmondwike	0.0	0.0	0.0	5.2	1.8	0.0	0.0	1.7	0.0	0.0	1.0
Holmfirth	0.0	0.0	0.0	0.0	0.0	2.2	14.4	0.0	0.0	0.0	0.9
Other Kirklees	4.7	9.4	7.1	43.5	6.3	1.9	1.4	20.7	50.5	34.5	21.5
Total Kirklees	97.9	93.2	41.9	88.4	95.6	57.0	92.9	90.0	76.0	39.5	73.4

Source: Table 21, Appendix 7

Comparison Goods Shopping Patterns: Furniture

- 4.29 Furniture is the single comparison goods category that attracts the highest proportion of trips to facilities in Kirklees originating from within the Study Area (with 75.1% of all such trips being to facilities within the District). As Table 4.12 identifies, the penetration of Huddersfield for furniture goods is less strong than for the majority of comparison goods categories, with just Zones 1 and 2 attracting a greater than two-thirds market share. Elsewhere in the District, Dewsbury attracts 6.8% of all such shopping trips (and 42.0% of such journeys which originate in Zone 8), whilst the other main towns each have a limited role. The lesser role of all of the main towns (including Huddersfield)



is not entirely unexpected given that furniture retailers often seek to operate at out of centre locations offering access to the wider road network.

- 4.30 As a consequence of this, we note that other locations in Kirklees – most obviously Birstall Shopping Park, which accommodates Ikea – support a significant number of furniture shopping trips. Birstall Shopping Park is the destination for 16.8% of all furniture goods shopping trips which originate within the Study Area.

Table 4.12: Furniture Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	66.7	68.7	21.5	17.7	50.6	44.9	45.7	3.3	3.2	1.5	28.7
Batley	0.0	0.0	2.7	4.1	0.0	0.0	0.0	4.2	16.4	0.0	2.3
Cleckheaton	0.0	0.0	0.0	9.7	0.0	0.0	0.0	0.0	0.0	2.5	1.7
Dewsbury	0.0	0.0	0.0	7.1	0.0	0.0	0.0	42.0	16.3	3.2	6.8
Heckmondwike	0.0	0.0	0.0	9.2	0.0	0.0	0.0	3.8	1.4	0.0	1.6
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	15.0	0.0	0.0	0.0	0.7
Other Kirklees	23.0	17.3	15.2	32.8	39.1	39.1	30.4	34.7	55.4	41.0	32.5
Total Kirklees	89.7	86.0	39.4	86.9	89.6	75.3	91.1	88.0	92.7	48.2	75.1

Source: Table 23, Appendix 7

Comparison Goods Shopping Patterns: DIY

- 4.31 By far the most popular DIY store in the Study Area is the B&Q at Leeds Road Retail Park to the north east of Huddersfield town centre. The B&Q attracts 39.2% of all DIY goods shopping trips which originate within the Study Area and, as a consequence and as identified by Table 4.13, Huddersfield attracts 45.9% of all such trips. There is a further B&Q store at Wilton Street in Dewsbury which attracts substantial trade (11.5% of all DIY shopping trips are to this store), with other stores attracting only limited journeys.
- 4.32 The two most popular DIY destinations outside the Study Area are the B&Q at Junction One Retail Park in Leeds (which secures a market share of 8.7%) and the B&Q at Cathedral Retail Park in Wakefield (5.9%), which is reflective of the fact that there are currently relatively few national retailers with any substantial presence in this sector.



Table 4.13: DIY Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	93.0	91.4	42.8	37.5	87.3	68.5	86.5	6.3	5.8	0.0	45.9
Batley	0.0	0.0	0.0	3.7	0.0	0.0	0.0	0.0	10.7	0.0	1.1
Cleckheaton	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Dewsbury	0.0	0.0	0.0	24.9	0.0	0.0	0.0	85.3	23.9	2.6	13.2
Heckmondwike	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	0.2
Holmfirth	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Kirklees	3.2	1.5	0.0	3.9	10.9	5.5	4.8	2.8	7.5	1.7	3.8
Total Kirklees	96.3	92.8	42.8	73.1	98.2	73.9	91.3	94.4	47.9	4.3	64.5

Source: Table 25, Appendix 7

Comparison Goods Shopping Patterns: Garden Goods

4.33 The six towns collectively secure a lower market share of shopping trips to purchase garden goods than for any other comparison goods category. Once more, this is not unexpected given the propensity for garden centres to historically be located in more suburban or rural settings. The B&Q at Leeds Road Retail Park is again the single most dominant facility in this goods category (attracting 15.7% of all such journeys which originate within the Study Area), with the Armitage’s Garden Centres at Shelley (8.4%) and Birchcliffe (6.7%) also being popular destinations. Table 4.14 identifies the derivation of garden goods expenditure which is attracted to each of the six town centres.

Table 4.14: Garden Goods Shopping Market Share by Town (%)

Town	1	2	3	4	5	6	7	8	9	10	Total
Huddersfield	44.1	65.6	20.2	21.5	31.2	10.1	39.8	5.7	6.7	2.8	22.4
Batley	0.0	0.0	0.0	1.2	0.0	0.0	0.0	4.5	13.7	0.0	1.4
Cleckheaton	0.0	0.0	0.0	3.5	0.0	0.0	0.0	0.0	0.0	1.5	0.8
Dewsbury	0.0	0.0	0.0	18.5	0.0	0.0	0.0	54.1	30.2	2.6	9.7
Heckmondwike	0.0	0.0	0.0	8.9	0.0	0.0	0.0	0.0	4.0	0.0	1.4
Holmfirth	1.4	0.0	0.0	0.0	0.0	0.0	3.8	0.0	0.0	0.0	0.3
Other Kirklees	42.5	26.9	12.3	24.5	60.6	68.1	50.2	14.9	10.2	0.0	27.3
Total Kirklees	88.0	92.5	32.5	78.0	91.8	78.2	93.8	79.2	64.8	6.9	63.3

Source: Table 27, Appendix 7

Comparison Goods Shopping Patterns

4.34 In considering shopping patterns, it is relevant to note the proportion of the Study Area population which resides within Kirklees, as assuming a relatively even and sustainable distribution of facilities



across the Study Area and beyond, it might be expected that the market share claimed by Kirklees will be broadly commensurate with its population. In this regard, we note that the ONS²⁷ estimated population of Kirklees at 2013 is 428,487. Given the estimated Study Area population of 615,401 at 2013, we estimate that 69.6% of the Study Area population reside in Kirklees. Accordingly, one might expect for Kirklees to claim around 70% (or thereabouts) of shopping trips in any one goods category.

4.35 Accepting this 'benchmark' as a starting point, we note that Kirklees' market share was more than 70% for electrical goods (73.4%) and for furniture goods (75.1%). Whilst a number of goods categories recorded a slightly less than 70% market share – including chemist goods (68.1%), small household goods (67.7%), DIY goods (64.5%), recreation goods (64.2%), garden goods (63.3%), Books, CDs and DVDs (60.6%) – it is accepted that there are a number of competing centres to the north of the Study Area and that one of these (Leeds city centre) has a regional role for comparison goods shopping. Accordingly, it is inevitable that significant trade is lost both to Leeds city centre and also to the White Rose Shopping Centre. Given the proximity of these two large facilities, the comparison goods market shares achieved are generally considered to be reasonable and broadly in line with expectations.

4.36 We do, however, note that the market share of trips claimed by Kirklees of trips to undertake clothes and footwear shopping is significantly less than for all other categories, with just 45.7% of such journeys directed towards facilities in the District. Moreover, Huddersfield claims an overall market share of just 28.3% of such trips. Whilst we again note the influence of competing high-order facilities in very close proximity to certain parts of the Study Area, we consider the recorded market share for clothes shopping to be less than could be expected. We provide additional commentary in respect of market share in Section 7 of this report.

In-Street Survey

4.37 To supplement the household shopper survey, NEMS undertook an in-street survey of users of the six town centres in March 2013. The survey consisted of a total of 570 face-to-face interviews of a random sample of visitors to the centres of Huddersfield (160 surveys), Batley (84 surveys), Cleckheaton (82 surveys), Dewsbury (82 surveys), Heckmondwike (75 surveys) and Holmfirth (87 surveys).

²⁷ Derived from the ONS Interim 2011-Based Subnational Populations Projections dataset, September 2012



4.38 Key questions asked related to respondents' reasons for travelling to the centre, their mode of travel, the length of their visit, their expenditure whilst visiting the centre, and their perception of the strengths and weaknesses of each centre. The tabulated results of the in-street survey are provided at Appendix 5. A summary of the key findings is set out below.

Main Purpose of Visit to the Centre

4.39 Table 4.15 identifies that the majority of the respondents to the in-street survey indicated that their main purpose for visiting the six town centres was to go to a bank, building society or to the Post Office, with a high proportion of respondents stating that their visit was associated with accessing their place of work or their school or college. With the exception of Huddersfield, a relatively large proportion of respondents were also visiting to shop at main foodstores. Popular stores include the Morrisons at Union Street in Heckmondwike (this being the principal purpose of the visit for 29% of those surveyed in Heckmondwike town centre), the Tesco at Northgate in Cleckheaton (the principal reason for the visit of 20% of those surveyed in Cleckheaton town centre), and the Tesco at Bradford Road in Batley (the principal purpose of the visit for 12% of those surveyed in Batley town centre). In contrast, Huddersfield attracts a substantially higher proportion of visitors to browse or to go clothes shopping which would appear to reflect its role as a sub-regional centre.

Table 4.15: Main Purpose of Visit to the Centre

Centre	Top Four Responses – % of Total Responses in Each Centre							
	1		2		3		4	
Huddersfield	Bank/Building Society/PO	16%	Work/School/College	15%	Browsing	14%	Clothes/Shoe Shopping	11%
Batley	Bank/Building Society/PO	15%	Tesco, Bradford Road, Batley	12%	Food & Grocery Shopping	10%	Work/School/College	10%
Cleckheaton	Bank/Building Society/PO	32%	Tesco, Northgate, Cleckheaton	20%	Work/School/College	6%	Café/Restaurant/Pub	5%
Dewsbury	Browsing	16%	Bank/Building Society/PO	11%	Work/School/College	10%	Asda, Mill Street, Dewsbury	9%
Heckmondwike	Morrisons, Union St, Heckmondwike	29%	Bank/Building Society/PO	9%	Clothes/Shoe Shopping	8%	Lidl, N'gate, Heckmondwike	7%
Holmfirth	Bank/Building Society/PO	16%	Work/School/College	10%	Browsing	8%	Co-operative Food, Market St, Holmfirth	8%

Source: NEMS In-Street Survey results, Appendix 5

Mode of Travel to the Centre

4.40 The method of travel to each of the six centres varied most significantly in terms of the incidence of visitors who travelled by bus and on foot. For example, whilst only 15% of visitors to Huddersfield travelled on foot, the comparable figure in Heckmondwike was 48%, which suggests that the majority



of visitors to Heckmondwike live locally. Table 4.16 identifies that, in contrast, Huddersfield attracts a significantly higher proportion of journeys which are made by car (46%) and by bus (33%). The highest proportion of respondents who travelled by bus and train were visiting the towns of Dewsbury and Huddersfield. This is not unexpected, given that the two are the largest centres in Kirklees and are served by conveniently located bus and railway stations. Almost no respondents travelled to any of the centres by bicycle.

Table 4.16: Mode of Travel to the Centre

	Bicycle	Bus	Car	Train	Walk
Batley	0%	27%	33%	0%	32%
Cleckheaton	0%	13%	56%	0%	31%
Dewsbury	0%	38%	34%	2%	22%
Heckmondwike	0%	15%	33%	0%	48%
Holmfirth	0%	29%	44%	0%	28%
Huddersfield	1%	33%	46%	4%	15%

Source: NEMS In-Street Survey results, Appendix 5

Spend on Last Visit on Non-Food Shopping

- 4.41 Batley and Holmfirth accommodate the smallest proportion of comparison goods units and floorspace of the six towns. This is reflected in the findings of the in-street survey which records that more than one third of respondents (36%) surveyed in both of these two centres only spent up to £10 on non-food shopping during their last visit. By way of contrast, as identified by Table 4.17 below, the survey recorded that the most popular sum to spend on non-food shopping in Huddersfield is between £21 to £50, which was identified as being the amount spent by 34% of respondents. Huddersfield town centre (as defined by Experian Goad) accommodates 237 comparison outlets, including House of Fraser, Marks and Spencer and TK Maxx, which provide visitors with greater opportunity to purchase multiple items over the course of one visit.
- 4.42 Surprisingly, the survey records that Cleckheaton has recorded a greater proportion of visits resulting in purchases totalling more than £50 (31%), compared to respective figures of 13% in Batley, 17% in Dewsbury, 21% in Heckmondwike, 16% in Holmfirth and 26% in Huddersfield. This may be attributable to the relatively high number of furniture, household goods and electrical stores which sell 'big ticket' items in Cleckheaton (although we recognise that the household survey identifies Cleckheaton as securing a limited market share of such goods). Batley, Dewsbury and Holmfirth all exhibit very similar characteristics in terms of the amount of expenditure which respondents spent during their last visit.



Table 4.17: Spend During Last Visit on Non-Food Shopping

	Up to £10	£11 to £20	£21 to £50	£51 to £100	More than £100
Batley	36%	23%	29%	9%	4%
Cleckheaton	24%	13%	33%	24%	7%
Dewsbury	33%	24%	26%	8%	9%
Heckmondwike	23%	20%	36%	14%	7%
Holmfirth	36%	22%	26%	11%	5%
Huddersfield	14%	26%	34%	15%	11%

Source: NEMS In-Street Survey results, Appendix 5

Reason that the Centre was Chosen for the Visit

4.43 The convenience of access to each of the six centres (i.e. its proximity to the respondent's home) was cited as being by far the greatest influencing factor in the reason that the centre was the destination for that particular trip. Other popular considerations included the centre being located either close to work or close to family or friends. In Batley, the second and joint third most cited factors were the range of health services in the town (5%) and the provision of services, such as banks and financial services (4%). Unsurprisingly, Huddersfield attracts the greatest proportion of visitors who specifically chose to visit the town to access the retail and service facilities, including the provision of services (11%), the choice of high street retailers (6%), the choice of shops selling non-food goods (8%), and the quality (3%) and range (3%) of the shops selling food goods. The most popular reasons for visiting the respective centres are set out below at Table 4.18.

Table 4.18: Reason that the Centre was Chosen for the Visit

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	Close to Home	71%	Range of Health Services	5%	Close to Work (Joint 3 rd)	4%	Provision of Services (Joint 3 rd)	4%
Cleckheaton	Close to Home	72%	Close to Work	13%	Close to Family/Friends	12%	Provision of Services	6%
Dewsbury	Close to Home	61%	Habit	9%	Close to Work (Joint 3 rd)	6%	Choice of Shops Selling Non-Food Goods	6%
Heckmondwike	Close to Home	77%	Close to Work (Joint 2 nd)	8%	Range of Shops Selling Food Goods (Joint 2 nd)	8%	Habit & Close to Friends/Family (Both Joint 4 th)	4%
Holmfirth	Close to Home	61%	Close to Friends/Family	8%	Close to Work	6%	Range of Independent/Specialist Shops	5%
Huddersfield	Close to Home	36%	Close to Work	12%	Provision of Services	11%	Close to Friends/Family	10%

Source: NEMS In-Street Survey results, Appendix 5



Shops and Services of Which More are Needed

- 4.44 Table 4.19 identifies that a high proportion of the visitors to the centres failed to identify any type of shop or service which could be brought to the town in order to improve the respective centre's overall offer, notably in Cleckheaton (45%), Holmfirth (43%) and Huddersfield (41%). This could suggest a degree of satisfaction on the part of respondents in respect of the adequacy of that particular centre's current attractions and the role the centre fulfils.
- 4.45 In Batley, Cleckheaton, Dewsbury and Heckmondwike, the most frequent positive response to the question was to identify that additional clothing stores would be of benefit to the centre. Batley had the greatest proportion of respondents who noted the need for more clothes shops, with 36% of those questioned providing this response.
- 4.46 In Holmfirth, the most frequently suggested addition to the mix of shops and services is the need for larger or better supermarkets, which was identified by 26% of respondents (which is reflective of the modest existing convenience provision). In addition, 10% of those surveyed in Holmfirth indicated that they would like to see more independent or specialist shops in the town.

Table 4.19: Types of Shops/Service of Which More are Required

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	Clothing Stores	36%	None Mentioned/ Don't Know	26%	Footwear Stores	18%	High Street Names	12%
Cleckheaton	None Mentioned/ Don't Know	45%	Clothing Stores	18%	Department Stores/ Retailers	15%	High Street Names	15%
Dewsbury	Clothing Stores	28%	High Street Names	28%	None Mentioned/ Don't Know	24%	Department Stores/Retailers	13%
Heckmondwike	Clothing Stores	31%	Footwear Stores	27%	High Street Names	20%	Department Stores/Retailers	19%
Holmfirth	None Mentioned/ Don't Know	43%	Larger/Better Supermarkets	26%	Independent/ Specialist Shops	10%	Clothing Stores	6%
Huddersfield	None Mentioned/ Don't Know	41%	Independent/ Specialist Shops	24%	Department Stores/ Retailers	23%	Clothing Stores	19%

Source: NEMS In-Street Survey results, Appendix 5

Leisure Facilities of Which More are Needed

- 4.47 In terms of particular leisure uses which may improve centres, more than half of all respondents in Batley (71%), Cleckheaton (77%), Holmfirth (84%) and Huddersfield (59%) did not identify any



additional leisure service which they thought was needed in the centre that they were visiting. Once again, the frequency of this response suggests that the vast majority of respondents consider the provision of leisure facilities in these town centres to be broadly appropriate.

4.48 Table 4.20 below indicates that the need for a new cinema was frequently cited by respondents as a means by which the leisure offer of centres could be improved, with this being the most popular suggested addition in Dewsbury (with 27% of respondents identifying the need for such a facility), Heckmondwike (25%), Batley (10%) and Cleckheaton (7%). The nearest multi-screen facility to each of these centres is the Showcase Cinema at Birstall Shopping Park. Whilst both Huddersfield and Holmfirth already accommodate cinemas, 8% and 5% of respondents surveyed in each of these respective centres identified the need for further provision.

4.49 The only other additional leisure facilities that were identified by more than one in ten of respondents in a particular centre relate to the need for a swimming pool and for provision for young people in Heckmondwike, both of which were identified by 13% of respondents in this town centre.

Table 4.20: Types of Leisure Services of Which More are Required

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	None Mentioned/ Don't Know	71%	Cinema	10%	Children's Activity Centre	7%	Music Venues/Pubs etc	5%
Cleckheaton	None Mentioned/ Don't Know	77%	Cinema (Joint 2 nd)	7%	Restaurants/Cafes (Joint 2 nd)	7%	Health & Fitness	6%
Dewsbury	None Mentioned/ Don't Know	62%	Cinema	27%	Bowling Alley	6%	Swimming Pool & Parks/Gardens (Both Joint 4 th)	4%
Heckmondwike	None Mentioned/ Don't Know	44%	Cinema	25%	Entertainment for Young People (Joint 3 rd)	13%	Swimming Pool & Health and Fitness Centre (Joint 3 rd)	13%
Holmfirth	None Mentioned/ Don't Know	84%	Art Galleries	5%	Cinema	5%	Children's Activity Centre	4%
Huddersfield	None Mentioned/ Don't Know	59%	Entertainment for Young People	9%	Cinema	8%	Bowling Alley	7%

Source: NEMS In-Street Survey results, Appendix 5

Measures to Improve the Centre

4.50 A high proportion of respondents were unable to identify any measures which would improve the town centre they were visiting, with this being the most popular response in Batley, Cleckheaton,



Dewsbury, Holmfirth and Huddersfield. This response was provided by at least one third of respondents in each of these centres and by more than half (59%) of respondents in Cleckheaton. The most frequently identified measure to improve the centres of Batley, Dewsbury and Huddersfield is to find tenants for currently vacant shops which was cited by 24%, 20% and 16% of respondents in these centres respectively. There is also a perceived need to increase the range of shops or improve the quality of shops in all of the centres (although it should be noted that such aspirations are frequently identified in surveys of this type and that we do not consider that the occurrence of the response in this instance is such that it causes particular alarm).

4.51 As responses to earlier survey questions suggested, there is a perceived shortfall in convenience goods shopping provision in Holmfirth town centre, with 7% of respondents in this centre identifying that improved foodstore provision would be of benefit to the town centre as a whole. Other responses of note in particular centres which are presented below at Table 4.21 include: the need to provide a general 'face lift' of the public realm in Batley and Holmfirth (identified by 8% and 6% of respondents respectively); the need to reduce traffic congestion in Cleckheaton (7%); the need for more entertainment or leisure facilities in Heckmondwike (19%); and to improve the cleanliness of Huddersfield (15%).

Table 4.21: Most Popular Suggested Measure to Improve the Centre

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	None Mentioned/ Don't Know	45%	Fill the Empty Shops	24%	Increased Choice/Range of Shops	11%	General 'Face Lift'	8%
Cleckheaton	None Mentioned/ Don't Know	59%	Improve the Quality of the Shops	10%	Increased Choice/Range of Shops	7%	Reduce Traffic Congestion	7%
Dewsbury	None Mentioned/ Don't Know	34%	Fill the Empty Shops	20%	Increased Choice/Range of Shops	15%	Improve Quality of the Shops	13%
Heckmondwike	Improve Quality of the Shops	23%	None Mentioned/ Don't Know (Joint 2 nd)	21%	Fill the Empty Shops (Joint 2 nd)	21%	Increased Choice/Range of Shops (Joint 2 nd)	21%
Holmfirth	None Mentioned/ Don't Know	41%	Increased Choice/Range of Shops	9%	Better Foodstore Provision	8%	General 'Face Lift'	6%
Huddersfield	None Mentioned/ Don't Know	44%	Fill the Empty Shops	16%	Improved Cleanliness	15%	Improve Quality of the Shops	11%

Source: NEMS In-Street Survey results, Appendix 5



Biggest Weaknesses of the Centre

- 4.52 Table 4.22 identifies that the most frequently cited biggest weakness of Batley and Dewsbury is the number of empty shops, which was identified by 38% and 35% of respondents respectively. This is not entirely surprising, as site visits undertaken by WYG in February 2013 (which are summarised in the following Section 5) found the level of vacancies in these two town centres to be the highest across all of the six towns.
- 4.53 In Cleckheaton, Holmfirth and Huddersfield between 40% and 50% of visitors surveyed failed to identify any major weaknesses in the centre they were visiting.
- 4.54 Of the weaknesses which were identified, the choice and range of non-food shops was consistently mentioned, with this appearing to be a particular issue in Heckmondwike (where it was identified by 24% of respondents) and Cleckheaton (18%). Holmfirth appeared to be the subject of more issues which were particular to the town (rather than being generic affecting most towns in the District and beyond), with key issues in this centre including traffic congestion (identified as a problem by 16% of respondents) and the appropriateness of foodstore provision (9%). It should also be noted that the lack of a market was highlighted by 20% of respondents in Heckmondwike, despite a weekly market being held in the town every Tuesday and Saturday.

Table 4.22: Biggest Weaknesses of the Centre

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	Empty Shops	38%	None Mentioned/ Don't Know	30%	Choice/Range of non-food Shops	8%	Tesco	8%
Cleckheaton	None Mentioned/ Don't Know	50%	Choice/Range of Non-Food Shops	18%	Lack of Public Amenities (Joint 3 rd)	5%	Range of Specialist/ Independent Retailers & Environment (Both Also Joint 3 rd)	5%
Dewsbury	Empty Shops	35%	None Mentioned/ Don't Know	27%	Choice/Range of non-food Shops	17%	Poor Appearance & Quantity of Takeaways/ Charity Shops (Both Joint 4 th)	9%
Heckmondwike	Choice/Range of Non-Food Shops	24%	None Mentioned/ Don't Know	23%	Empty Shops	21%	Lack of a Market	20%
Holmfirth	None Mentioned/ Don't Know	40%	Traffic Congestion	16%	Foodstore Provision	9%	Quantity of Takeaways/ Charity Shops	8%
Huddersfield	None Mentioned/ Don't Know	43%	Empty Shops	23%	Poor Appearance	14%	Choice/Range of Non-Food Shops	7%

Source: NEMS In-Street Survey results, Appendix 5



Biggest Strength of Market

- 4.55 For each of the centres, respondents most frequently indicated that they were unable to identify the biggest strength of the market in that particular centre. We would again suggest that such a response is not entirely uncommon in undertaking this kind of survey, but we do note that 62% of respondents were unable to identify Batley Market’s biggest strength, which is considered to be particularly high.
- 4.56 Table 4.23 indicates that a wide variety of market strengths were identified in all six centres, with factors such as value for money, the variety of goods available and the freshness of produce frequently being cited by those surveyed. It is also notable that, in the case of Heckmondwike, a number of respondents noted that the friendliness of the market is one of its strongest attributes.

Table 4.23: Biggest Strength of Market

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	Nothing/Don't Know	62%	Freshness of Food	8%	Variety	8%	Range of Food	6%
Cleckheaton	Nothing/Don't Know	38%	Value for Money	17%	Freshness of Food	11%	Variety	9%
Dewsbury	Nothing/Don't Know	33%	Variety	16%	Value for Money	15%	Freshness of Food	6%
Heckmondwike	Nothing/Don't Know	27%	Value for Money	15%	Freshness of Food	13%	Friendly Atmosphere	12%
Holmfirth	Nothing/Don't Know	40%	Value for Money	12%	Availability of Local Produce	9%	Range of Food	8%
Huddersfield	Nothing/Don't Know	34%	Freshness of Food	12%	Value for Money	6%	Quality of Food	6%

Source: NEMS In-Street Survey results, Appendix 5

Biggest Weakness of Market

- 4.57 Encouragingly, more than half of all those surveyed did not identify any particular weakness with the market within the town centre which was the subject of the respondent’s visit. This response was particularly prevalent in Cleckheaton and Dewsbury where at least seven out of every ten respondents failed to identify any particular weaknesses.
- 4.58 Table 4.24 indicates that very few weaknesses at any of the markets were identified repeatedly, with most of those issues mentioned relating either to the particular market not being big enough, not having enough stalls or having too many stalls selling the same goods. Only two weaknesses were identified by more than 10% of respondents in any one centre, these being the perception that there are not enough stalls in Batley and that there are too many stalls selling the same goods in Dewsbury.



Table 4.24: Biggest Weakness of Market

Centre	Top Four Responses – % of Total Respondents in Each Centre							
	1		2		3		4	
Batley	Nothing/Don't Know	56%	Not Enough Stalls	18%	Not Big Enough	12%	Too Many Stalls Selling Same Goods	6%
Cleckheaton	Nothing/Don't Know	77%	Not Big Enough	7%	Too Many Stalls Selling Same Goods	4%	Not Enough Stalls	2%
Dewsbury	Nothing/Don't Know	70%	Too Many Stalls Selling the Same Goods	12%	Too Many Foreign/Ethnic Stalls	6%	Not Big Enough/Poor Facilities (Both Joint 4 th)	2%
Heckmondwike	Nothing/Don't Know	56%	Not Enough Stalls	9%	Empty stalls	5%	Not Heated & Too Noisy (Both Joint 4 th)	4%
Holmfirth	Nothing/Don't Know	67%	Not Big Enough	7%	Not Enough Stalls	7%	Too Many Stalls Selling Same Goods	5%
Huddersfield	Nothing/Don't Know	65%	Empty stalls	8%	Not Enough Stalls	4%	Atmosphere & Too Many Foreign/Ethnic Stalls (Joint 4 th)	3%

Source: NEMS In-Street Survey results, Appendix 5



5.0 Health Check Assessments

- 5.01 The NPPF identifies a number of factors which will be of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF indicates that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer and in order to reflect the individuality of town centres.
- 5.02 However, we note that the NPPF does not provide a list of indicators which can be used to assess the health of a centre. In this regard, the former Planning Policy Statement 4: Planning for Sustainable Economic Growth (December 2009) is the most recent national policy document which provided a comprehensive list of key town centre health indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time.
- 5.03 Accordingly, in the absence of any particular guidance in the NPPF in respect of key indicators, those identified in PPS4 remain of some relevance in assessing the health of centres. The PPS4 performance indicators include the following:
- **Diversity of main town centre uses (by number, type and amount of floorspace)**
Data on the diversity of uses in each of the six town centres was collated during WYG's town centre surveys in February/April 2013.
 - **The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations**
Consideration has been given to the scale of out-of-centre retail provision in the vicinity of the centres.
 - **The potential capacity for growth or change**
Our surveys of the centres have had particular regard to the proliferation of vacant land and premises and the opportunities which may exist for future growth.
 - **Retailer representation and retailer demand**
Information on the current strength of centres, retailer representation and retailer requirements has been derived from Venuescore's UK Shopping Venue Rankings and from other published sources.
 - **Shopping rents – the average Zone A rents paid in centres**
Zone A rental data has been sourced from EGi, which is a widely recognised source of such data.



- **Proportion of vacant street level property**
Vacant properties were identified during the undertaking of the town centre surveys.
- **Pedestrian flows**
General footfall was again noted during the undertaking of the town centre surveys.
- **Accessibility**
Consideration of access to and around each centre is informed by our surveys and by the findings of the in-street visitor surveys.
- **State of town centre environmental quality**
Consideration of the quality of the buildings and public realm in each of the town centres has also been informed by our 'on-the-ground' observations and by the findings of the in-street visitor survey.

- 5.04 The commentary below provides a summary of our analysis of the health of the six town centres – Huddersfield, Batley, Dewsbury, Cleckheaton, Heckmondwike and Holmfirth – with reference to any identified changes in their performance over time. The commentary is supplemented by a more detailed appraisal of available data relating to each centre's performance which is provided as Appendix 6 of this Study. The comprehensive appraisal provides full details of all data sources which have been drawn upon in undertaking our analysis. The summary provided below considers the performance of each town centres in turn and should be read in conjunction with the detailed health check assessments.
- 5.05 Our health check assessments are based on the Experian Goad definitions of the centres (rather than any definition which may have previously been used by the Council for town centre auditing purposes) as this allows direct comparison with national average figures and previous work undertaken by WYG²⁸. Experian Goad boundaries tend to be based primarily around a centre's retail offer and are relatively tightly focused.
- 5.06 Table 5.1 provides a summary of the total number of units and floorspace within each centre. This is based on each of the six Experian Goad categories: 'convenience', 'comparison', 'retail services', 'leisure services', 'financial/business services' and 'vacancies'. Huddersfield is the principal centre in the district and this is reflected by the centre having the largest number of units and floorspace. Holmfirth contains the least number of units and floorspace of the six town centres.

²⁸ North Kirklees Retail Assessment, WYG, 2007



Table 5.1: Summary of the Existing Stock of Premises in Kirklees Town Centres

Centre	Total Number of Outlets	Total Amount of Floorspace (sq.m)
Batley	128	25,780
Cleckheaton	142	16,180
Dewsbury	305	44,160
Heckmondwike	142	24,740
Holmfirth	121	12,990
Huddersfield	659	147,750

Source: Site Visits of February (in the case of Batley, Dewsbury, Holmfirth and Huddersfield) and April (Cleckheaton and Heckmondwike)

Note: The figures are based on the town centre boundaries as defined by Experian Goad

Huddersfield Town Centre

- 5.07 Huddersfield is located in the centre of the defined Study Area, approximately 14 km to the south west of Dewsbury and 10 km to the north of Holmfirth. It is identified as a Regional Centre by the Venuescore 2011-2012 retail rankings which places the centre in the top 5% of all UK shopping venues considered by Venuescore. The town centre has a sub-regional role, with people travelling there for shopping and entertainment purposes from well beyond Huddersfield itself.
- 5.08 Experian Goad's survey of Huddersfield from October 2012 was updated by WYG during our visit to the centre in February 2013 in order to provide an up to date source for our analysis. Our record of the occupation of units and floorspace has been compared to UK national average data in order to identify any potential issues in respect of the composition of the retail and service offer. The survey of Huddersfield in February 2013 identified that there are 659 units within Experian Goad's definition of the town centre, which provide a total gross floorspace of 147,750 sq.m. We have utilised town centre boundaries as identified by Experian Goad for our analysis in order to consider an extensive area and to allow direct a comparison with the national average figures (which are calculated using Experian Goad's assessment of the boundary of each venue).
- 5.09 The main shopping area in Huddersfield is concentrated along the pedestrianised routes of New Street and King Street. There are also several indoor shopping centres which accommodate a significant concentration of national multiples operators, including the Piazza Shopping Centre, the Kingsgate Centre and the Packhorse Centre.
- 5.10 Overall, Huddersfield town centre exhibits a number of positive signs in respect to the health check indicators. It has a good provision of foodstores, including the Sainsbury's stores at Wakefield Road and Market Street, the Tesco at Viaduct Street and the Lidl at Manchester Road. Huddersfield also



accommodates two permanent markets, namely an open market on Byram Street and the Queensgate Market.

- 5.11 Whilst the number and amount of comparison units and floorspace has declined from 262 units in 2008 to 237 in 2013, there is still a strong variety of national multiple and local independent traders in Huddersfield. The largest national comparison retailers present in the town centre include the House of Fraser and TK Maxx stores in the Kingsgate Shopping Centre, Wilkinson on New Street and the BHS in the Piazza Shopping Centre. Huddersfield town centre accommodates 25 of the top 27 comparison retailers, as defined by Experian Goad, with Debenhams and John Lewis being the two operators currently without representation.
- 5.12 The service sector is well represented in Huddersfield, with health and beauty traders particularly dominant in the town centre. In addition, there are two Post Offices at New Street and Northumberland Street. There is also a good provision of leisure services in Huddersfield, with the most common type of units comprising takeaways (of which there are 34), cafes (31), bars and wine bars (22) and public houses (18). There are several national operators in the centre, including Greggs, Ladbrokes and Pizza Hut. The site visit by WYG in February 2013 indicated that whilst the leisure units are dispersed throughout the town centre, there is also a particular concentration on King Street, to the south of the Kingsgate Shopping Centre. In terms of financial and business services in Huddersfield, the proportion of outlets occupied by such uses (10.3%) is slightly below the national average figure (11.0%), whilst the proportion of floorspace occupied by such uses (9.1%) is slightly above the national average level (8.3%).
- 5.13 In addition to the retail and service provision in Huddersfield town centre, there are also seven retail parks located outside of the Experian Goad defined town centre boundary accommodating additional retail and leisure operators. These comprise Castlegate Retail Park, Gallagher Retail Park, Wakefield Road Retail Park, Great Northern Retail Park, Phoenix Retail Park, Leeds Road Retail Park and the Ringway Centre. An assessment of the offer available at each of these retail parks is provided at Appendix 6.
- 5.14 There have been several recent proposals for new development in Huddersfield town centre. Firstly, outline planning permission for a two-storey extension to the existing Kingsgate Shopping Centre was granted in 2008. The development has not been implemented to date, though a three year extension to the consent was obtained in November 2011. An application for a £200m redevelopment of the Queensgate site to include a new library, art gallery and information centre, three-storey department store, 100 bed hotel, a new market hall, bars, restaurants and up to 900 parking spaces was



submitted in 2008. The plans are believed to be on hold due to the requirement for additional private sector investment and the application is currently being held in abeyance. In addition, Tesco was granted permission in February 2012 for a new foodstore on land at Southgate.

- 5.15 Our site visit in February 2013 identified that the 92 vacant units in Huddersfield together account for 12,990 sq.m of gross floorspace. Whilst the rate of vacant outlets (14.0%) is slightly above the national average (12.2%), the proportion of vacant floorspace (8.8%) is below the UK average figure (10.1%). Although there has been a significant improvement in the level of vacancies since August 2010, there are still areas in the centre where vacancies are concentrated, notably within the central and southern area of New Street and around Princess Alexandra Walk (Piazza) and Market Arcade.
- 5.16 An assessment of the general pedestrian flows in the town centre was noted during the site visit to Huddersfield in February 2013. It was evident that the greatest levels of activity were located within the Kingsgate Shopping Centre and the pedestrianised areas of New Street, with lower levels of activity on more peripheral streets such as Westgate and John William Street.
- 5.17 The overall environmental quality of Huddersfield is good, with the historic centre creating an attractive shopping area for visitors to the centre. As the majority of the centre is designated as Huddersfield Town Centre Conservation Area, the Council recognises that any new development proposals there should be designed to a high standard which both enhances and preserves the area. The Huddersfield Town Centre Partnership was formed in 2006 to promote a safe and vibrant shopping environment. The businesses members are supported by a radio link communication system which helps to assist in the apprehension and prosecution of offenders. Huddersfield police station headquarters are located on Castlegate, to the south of the town centre.

Summary

- 5.18 Huddersfield town centre exhibits a number of positive signs in relation to the health check indicators. It accommodates a large number of units and is well represented in terms of both national and independent retailers, with the indoor shopping centres and markets enabling a variety of operators to successfully trade in the centre. Whilst the proportion of vacant outlets is above the national average, the proposals for the expansion of the town, including the Kingsgate and Queensgate development schemes, will help to regenerate these areas of the centre.



Dewsbury Town Centre

- 5.19 Dewsbury is located in the north of the defined Study Area, with Huddersfield located approximately 14 km to the south west and Wakefield 10 km to the east. Dewsbury is identified as a District Centre by the Venuescore 2011-2012 retail rankings and is ranked within the top 20% of all UK shopping venues considered by Venuescore. Our survey of Dewsbury in February 2013 identified a total of 305 units, providing a gross floorspace of 44,160 sq.m (based upon the Experian Goad defined town centre boundary).
- 5.20 The main shopping area in Dewsbury is concentrated within the pedestrianised section of Market Place, Foundry Street and the Princess of Wales Precinct. The Rishworth Centre Retail Park is also located to the south of Vicarage Road, with the pedestrian crossings acting to encourage linked trips between the two shopping destinations.
- 5.21 Our survey of the centre in February 2013 identified that, when compared to the national average, there is a shortfall in terms of both the proportion of convenience outlets and the overall floorspace dedicated to convenience goods sales. However, the Rishworth Centre (which lies beyond the Experian Goad defined town centre boundary) does accommodate large Asda and Sainsbury's foodstores. Since March 2007, the number of convenience units in the centre has decreased by six, but the amount of floorspace dedicated to such sales has increased by 1,490 sq.m (with several medium-sized operators, including Global Groceries and Heron Foods, taking space in the town). Dewsbury also accommodates an open market on Foundry Street which sells a variety of goods, though for the purposes of this analysis it has been classified as a convenience goods facility.
- 5.22 Larger comparison goods retailers in Dewsbury include Wilkinson, Boots and Peacocks. However, since 2007 there has been a significant reduction in the amount of comparison goods outlets and floorspace, with several national operators no longer having representation in the centre, including Marks and Spencer, H Samuel and Dorothy Perkins. The Rishworth Centre does accommodate a number of multiple retailers, including Currys, Matalan, Next and Poundstretcher.
- 5.23 There is a good provision of retail service outlets in Dewsbury town centre, with the 37 units accounting for a total of 4,120 sq.m of floorspace. The health and beauty sector occupies 22 such units, with other retail service uses including travel agents (four), opticians (four), vehicle repairs (two) and a Post Office on Wakefield Old Road. Dewsbury is currently under-provided for in terms of the proportion of leisure services, despite there being an increase in the number of units (by nine) and the amount of floorspace (by 470 sq.m) since March 2007. There are five national leisure operators in



the centre, namely Coral, Ladbrokes, McDonalds, Quiksilver and William Hill. Our survey of the centre in February 2013 identified that many of the national high street banks and building societies are present in Dewsbury, including Barclays, Halifax and Santander. In addition, there is considered to be a good provision of other outlets, including several financial, property and legal services.

- 5.24 In addition to the commercial provision in Dewsbury town, the Rishworth Centre and several adjacent retail units are located to the south of the town centre. This area accommodates Asda and Sainsbury's foodstores, B&Q, Next and Sue Ryder (in the former Topps Tiles unit). At the time of our visit, there were four vacant units in the retail park, including the former Netto, JJB Sports, United Carpets and Glyn Web units.
- 5.25 Our survey of Dewsbury in February 2013 identified 82 vacant units in the town centre, which together account for 10,010 sq.m of gross floorspace. This equates to a vacancy rate of 26.9% in terms of the number of units and of 22.7% in respect of floorspace. Both of these rates are substantially greater than the respective national average figures of 12.2% and 10.1%. Since March 2007, there has also been an increase in the vacancy rate, with a further 39 units and 2,520 sq.m of floorspace being vacated. The largest vacant units are the office building at Wakefield Old Road (which provides 1,030 sq.m of gross floorspace) and 47 to 51 Daisy Hill (540 sq.m). It should be noted that 16 of the vacant units are currently in the process of being refurbished. We also note that the former Safeway foodstore site at Bradford Road remains undeveloped.
- 5.26 An assessment of the general pedestrian flows in the town centre was undertaken during our site visit of February 2013. The greatest levels of activity were located within the pedestrianised areas of Market Place and Foundry Street, with Northgate and Westgate also having high levels of pedestrian footfall. The annual town centre surveys undertaken by the Council also record the pedestrian footfall levels, with the most recent available data being from October 2011. The figures indicate that between 2010 and 2011 there was a minor decline in the footfall levels by 1.5%, although it should be noted that the Council report states that the weather conditions during the Wednesday and Saturday of the survey were particularly poor. However, the report does clearly indicate that since 1999, there has been a clear downwards trend in the footfall levels, particularly on market days and Saturdays.
- 5.27 Notwithstanding this, Dewsbury remains a generally visually attractive town centre, with the majority of the historic core within the inner ring road designated as being a Conservation Area (within which there are 57 listed buildings). The high proportion of vacant units does, however, detract from the overall quality of Dewsbury and makes certain areas of the centre appear tired and neglected.



Summary

- 5.28 Whilst Dewsbury town centre performs adequately against a number of the key indicators and accommodates a variety of retail and service units, including several national operators, the level of vacancies in the centre gives rise to some concern. Both the proportion of vacant units and the proportion of vacant floorspace are double the national average level, suggesting a lack of operator interest in the town. However, we do note that a number of units are being refurbished, which may result in a future improvement in the vacancy rate once these premises are re-let. The centre itself is attractive, with good quality buildings and the open market acts to attract visitors to the town centre. However, the quality of the environmental and public realm throughout the centre varies and it is apparent that a number of units (particularly the vacant buildings) are in need of investment and refurbishment.

Batley Town Centre

- 5.29 Batley is located in the north of the defined Study Area, approximately 15 km to the north east of Huddersfield and 14km to the south west of Leeds city centre. It is identified as a Local Centre by the Venuescore 2011-2012 retail rankings. Our survey of Batley in February 2013 identified a total of 128 units which comprise a total gross floorspace of 25,780 sq.m (based upon the Experian Goad defined town centre boundary).
- 5.30 Commercial Street and Branch Road are the key commercial streets in Batley town centre, with the indoor Batley Shopping Centre also accommodating several national operators. An outdoor market is held every Friday on Market Place, opposite the Town Hall on Commercial Street.
- 5.31 There is a good provision of convenience units in Batley, with the 13 convenience goods stores providing a total gross floorspace of 12,860 sq.m. The Tesco Extra store on Bradford Road is by far the largest store, but other national operators in the town include Asda, Iceland and Fulton Foods within the Batley Shopping Centre and the Aldi at Branch Road. The Batley Shopping Centre has been open for twenty years and the Tesco Extra store commenced trading in 2003. An outdoor market is held every Friday on Market Square and sells a variety of food and non-food goods.
- 5.32 The proportion of comparison goods outlets in the centre is below the national average level and, since March 2007, there has been a reduction of 10 units and 590 sq.m of floorspace dedicated to comparison goods sales. Despite this, there is still a reasonable variety of national comparison operators in Batley, including Boots, Co-op Pharmacy and O2. The Mill, which is a discount retail warehouse accommodating a variety of clothing, furniture and gift stores over four floors, is located



on Bradford Road, to the east of the Experian Goad defined town centre boundary. Several national operators are accommodated at The Mill, including Antler and Edinburgh Woollen Mill, as well as four restaurants.

- 5.33 Batley also accommodates 27 retail service outlets (including the Post Office, Specsavers and Thomas Cook), 21 leisure service units and 13 financial and business service outlets (including Barclays, Halifax, Lloyds TSB, Santander and Yorkshire Bank).
- 5.34 The proportion of vacant outlets is above the national average, with 23 vacant units apparent at the time of our survey in February 2013. There is a particular concentration of vacant units within Batley Shopping Centre (10 units) and Commercial Street (nine units). Since March 2007, there has been an increase both in terms of the number of vacancies (by 10 units) and the amount of vacant floorspace (by 500 sq.m). In addition, since the undertaking of a previous Experian Goad survey in July 2012, there have been four new vacant units (including the former Shoe Zone and Home Discounts stores in the Batley Shopping Centre on Commercial Street), whilst one formerly vacant unit has now re-let (to Fulton Foods).
- 5.35 An assessment of the general flow of pedestrian traffic in the town centre was undertaken during the site visit to Batley in February 2013, with the greatest levels of activity being apparent within Batley Shopping Centre and around the Tesco Extra store, with The Mill also appearing to be trading well. Annual town centre surveys by Kirklees Council also record pedestrian footfall levels, with the most recent data sample of Batley undertaken in October 2011. The figures suggest that, since 2010, there has been a decline in the number of pedestrians visiting the centre on a non-market day (by 16.1%), whilst there has actually been an increase in the rate of footfall (by 23.0%) recorded on Saturday afternoon. Overall, the Council's assessment identifies an overall decline in pedestrian levels by 3.2% since 2010.
- 5.36 Batley Conservation Area is concentrated around Commercial Street, Hick Lane and Market Place, with the boundary excluding the Batley Shopping Centre and the Tesco Extra store. The environmental quality of Batley is considered to be generally good, although the high level of vacancies in Batley Shopping Centre and along certain sections of Commercial Street does detract somewhat from the town centre's overall attractiveness. The peripheral areas surrounding the town centre are of a poorer quality, notably in the business and industrial areas to the south of Wellington Street.



Summary

- 5.37 Our site visit of February 2013 identified that Batley has a good provision of retail and service facilities and has a relatively comprehensive convenience goods sector. Whilst the high level of vacant units and relative lack of comparison goods in the town centre are an issue which should be addressed going forward, we consider that the presence of The Mill shopping outlet and the large Tesco Extra assist in drawing people to Batley and help underpin the ongoing viability of the centre as a whole.

Cleckheaton Town Centre

- 5.38 Cleckheaton is located in the northern part of the defined Study Area, approximately 13 km to the north of Huddersfield and 6 km to the west of Batley. It is identified as a Local Centre by the Venuescore 2011-2012 retail rankings. Our survey of Cleckheaton in April 2013 identified there to be a total of 142 units, which provide a total of 16,180 sq.m of gross floorspace.
- 5.39 The main shopping offer of Cleckheaton is focused around Northgate and Bradford Road, with Cheapside and Albion Street also accommodating a number of retail operators.
- 5.40 There is a good provision of convenience goods and comparison goods outlets in Cleckheaton, with both of these sectors including a number of national operators. The 10 convenience stores within the town centre include the Tesco store at Northgate, Fulton Foods at Central Arcade, three bakers (including Greggs), two butchers, a greengrocer and a health food shop. The indoor market at Horncastle Street is open from Monday to Saturday and accommodates a variety of stalls. However, for the purposes of our analysis, we have classed the whole operation as a convenience unit.
- 5.41 In terms of comparison goods, the amount of comparison units and floorspace has increased slightly from December 2010, with the largest units being occupied by Wynsors World of Shoes at Horncastle Street and Inches DIY store at Market Street. The other national comparison retailers occupying space in Cleckheaton comprise Hallmark cards and Rowlands Pharmacy, and the Age UK, Oxfam and the RSPCA charity shops.
- 5.42 Whilst our assessment identifies a slight decline in the retail service sector since 2010, the sector remains strong in Cleckheaton, with both the proportion of outlets and floorspace being above the respective national average figure. The health and beauty sector accounts for more than half of such units, with the centre also accommodating three opticians, two travel agents, a dry cleaners, a Tesco filling station, Blockbuster, photo studio and a Post Office. Similarly, there is a good provision of leisure services in Cleckheaton, with the most common type of units comprising takeaways (10 units),



public houses (five), cafes (five), casinos and betting offices (three) and restaurants (two). There is a good variety of financial and business service outlets in the centre, including eight retail banks and buildings societies, five property services and four legal services.

- 5.43 In April 2010, planning permission was granted for the erection of a replacement 6,750 sq.m gross Tesco foodstore (with a net sales floorspace of 3,533 sq.m), 11 retail units (814 sq.m), a petrol station, car parking and associated works (planning permission reference 2009/91958). Two applications for non-material amendments to the permitted scheme were submitted in January and February 2013, but no start has been made on site and we are informed that Tesco has indicated to the Council that it does not intend to proceed with the development.
- 5.44 An outline application with all matters reserved for the erection of a mixed-use development on land at Horncastle Street and Northgate was approved in April 2010 (planning permission reference 2009/92638), with the illustrative layout indicating that the scheme has potential to accommodate a discount supermarket with a gross floor area of approximately 1,500 sq.m. An application to extend the time limit for the implementation of the original application was granted planning permission in December 2012.
- 5.45 Our survey of the centre in April 2013 identified that both the proportion of outlets (7.7%) and the amount of vacant floorspace (4.0%) in the centre are below the respective national average figures of 12.2% and 10.1%. The 11 vacant units account for only 650 sq.m of the total floorspace in Cleckheaton. The largest vacancies comprise the former Printing.com unit at Bradford Road and Unit 2, Cheapside.
- 5.46 An assessment of the general flow of pedestrian traffic in the town centre was undertaken during the site visit to Cleckheaton in February 2013. The greatest levels of activity were noted as being along Northgate and close to the Tesco foodstore at Railway Street. The annual town centre surveys undertaken by the Council record pedestrian footfall levels, with the most recent available data being from June 2012. The data indicates that between 2011 and 2012 there was an overall improvement in pedestrian footfall (by 2.7%), with a significant increase identified on the Tuesday survey (with footfall being up 23.0% on the Tuesday compared to 12 months previously).
- 5.47 We consider the overall environmental quality of Cleckheaton to be good, with little evidence of litter, graffiti or vandalism. An area of vacant land at Horncastle Street currently has a detrimental impact on the attractiveness of this part of the town, but the aforementioned planning permission provides



for the redevelopment of this site for a foodstore use. The low level of boarded-up vacant shops which would also appear to suggest that the centre is performing satisfactorily.

Summary

- 5.48 Our survey of the centre in April 2013 identified a reasonably good mix of different retail sectors, with very few vacancies. Whilst the centre has a limited range of high street multiples, this is not wholly surprising given the size of the centre and its role and function. Whilst Tesco has planning permission to provide a replacement foodstore and 11 new retail units, which could potentially assist in attracting further national operators to the town, we are informed that this scheme will now not proceed.

Heckmondwike Town Centre

- 5.49 Heckmondwike is located in the north of the defined Study Area, approximately 12 km to the north of Huddersfield and 5 km to the north west of Dewsbury. It is identified as a Local Centre by the Venuescore 2011-2012 retail rankings. Our survey of Heckmondwike town centre in February 2013 identified there to be a total of 142 units, comprising a gross floorspace of 24,740 sq.m.
- 5.50 The main shopping area in Heckmondwike is concentrated along Westgate, Northgate and Market Street, with the key national operators in the centre including Morrisons, Lidl and Superdrug.
- 5.51 There is a good provision of convenience stores in Heckmondwike, with the ten outlets providing a total gross floorspace of 8,410 sq.m. The Morrisons at Union Street and the Lidl at the Northgate Retail Centre are the largest foodstores in the town, with additional convenience provision including Fulton Foods and four bakers or confectioners. The indoor market on Blanket Hall Street operates every Tuesday and Saturday.
- 5.52 Since October 2011, there has been a reduction in the total number of comparison outlets by two units, whilst the amount of comparison goods floorspace has actually increased by 170 sq.m. The comparison goods sector accounts for only 20.4% of total outlets and 20.7% of the floorspace in Heckmondwike, with both figures being well below the national averages of 33.0% and 36.4%. The largest units in the centre comprise Store Twenty One at Market Street and the Poundstretcher at Northgate Retail Centre, with other national operators represented in the town including Co-op Pharmacy, Peacocks and Superdrug.
- 5.53 The retail service sector is well represented in Heckmondwike, with an additional five units and 370 sq.m of floorspace being dedicated to the sector since October 2011, including four new health and



beauty salons. The majority of retail service outlets are operated by local independents, though there are also several national businesses, including Co-op Travel and the Post Office.

- 5.54 The 32 leisure service units in Heckmondwike account for 22.5% of total outlets and 17.2% of the total floorspace. The fast food sector is well represented in the town centre with 17 outlets, and there are also five cafes, three public houses, two restaurants, two casinos/betting offices, two clubs and one amusement arcade. The four national leisure operators present comprise Domino's Pizza, McDonald's, Pizza Hut and William Hill.
- 5.55 In terms of financial and business services in Heckmondwike, the proportion of units put to such a use (12.7%) is above the national average (11.0%), whilst the floorspace occupied by such uses in the town centre (7.2%) is slightly below the national average level (8.3%). Our survey of April 2013 identified a good variety of services including five retail banks, four financial services, three estate agents, two employment agencies, a building firm, a solicitors and a printing business.
- 5.56 In April 2013 there were 19 vacant units in Heckmondwike, which together accounted for 2,220 sq.m of gross floorspace. Whilst the proportion of vacant units (13.4%) is marginally above the national average rate of 12.2%, the proportion of vacant floorspace (9.0%) is below the average (10.1%). Since October 2011, the vacancy rates in Heckmondwike have improved, with an additional four units and 480 sq.m of gross floorspace now in active use. The largest vacancies are the former Royal Mail sorting office on Oldfield Lane which closed in August 2012 and the former Queen Hotel on Westgate.
- 5.57 An assessment of the general pedestrian flows in the town centre was undertaken during the site visit to Heckmondwike in February 2013. The greatest levels of activity were recorded as being at Northgate Retail Centre, along Market Street and at the Morrisons foodstore. The annual town centre surveys undertaken by the Council record pedestrian activity and, in the case of Heckmondwike, find that pedestrian activity in the town centre has generally improved over the last 10 years. However, the most recently available data, from 2011, indicates that there has been a decline of 7% in pedestrian footfall when compared with the previous year, with a particular loss of pedestrian traffic across weekday afternoons.
- 5.58 The overall environmental quality of Heckmondwike is good, though there are several poorly maintained buildings which result in pockets of the town centre appearing to be run down. Our survey of the centre has identified that ten of the units which were recorded as being vacant in April 2013 were also vacant in October 2011, suggesting that parts of the commercial stock may be unattractive to new businesses taking space or seeking to take space in the town.



Summary

- 5.59 Heckmondwike accommodates a relatively good mix of retail and service uses and the centre appeared to be trading well on the day of our site visit in April 2013. However, whilst vacancy levels have improved since the previous survey in October 2011, there is a high level of long-term vacancies, with some of the stock considered to be in a relatively poor and unattractive condition.

Holmfirth Town Centre

- 5.60 Holmfirth is located in the south of the defined Study Area, approximately 24 km to the west of Barnsley and 10 km to the south of Huddersfield. Due to its small scale and lack of national operators, Holmfirth is not identified by the Venuescore 2011-2012 retail rankings. It does however provide the greatest provision of services in south Kirklees.
- 5.61 Our survey of Holmfirth in February 2013 identified there to be a total of 121 units, comprising a gross floorspace of 12,990 sq.m.
- 5.62 Huddersfield Road, Victoria Street and Hollowgate are the key shopping areas in Holmfirth, with the largest foodstore in the centre being the Co-operative Food located on Market Street to the north of the town. Holmfirth is a popular tourist destination, in part due to its role as a filming destination for the TV series Last of the Summer Wine.
- 5.63 There are a reasonable number of convenience units in Holmfirth, with the sector occupying 9.1% of all stores in the centre and 22.4% of the floorspace (both of which are above the national average figures). The town is anchored by the Co-operative Food supermarket on Market Street which appeared to be trading well on the day of the site visit in February 2013. The other convenience units in the centre are operated by small local independent traders, including four bakers/confectioners, a butcher, green grocer and health foods shop. The indoor market on Huddersfield Road accommodates twice-weekly events on a Thursday (the general market) and Saturday (the craft and food market), with a farmers market held there once a month.
- 5.64 The comparison sector is well represented in the town and since February 2011, there has been an increase both in the number and amount of units and floorspace. The majority of the stores are run by independent traders, though there are two national operators, namely the Age UK and Oxfam charity shops. There is a good range of comparison outlets, including seven craft/gift shops, six ladies clothing units, six charity shops and three jewellers. The largest concentration of comparison goods floorspace in Holmfirth is at Riverside Shopping Centre and Holmfirth Mills, the latter of which sells a



variety of household goods and furnishings. Several of the units in Riverside Shopping Centre are currently vacant and we are informed that the whole building was under offer in February 2013.

- 5.65 Retail services in Holmfirth account for 10.7% of the outlets (13 units) and 8.0% of the floorspace (1,040 sq.m) in the centre, which compares to respective national averages of 13.6% and 7.2%. The majority of the units are operated by independent traders, with the exception of the Post Office, Thomas Cook and the two Co-op Travel outlets. The eight health and beauty salons are concentrated around Hollowgate and Huddersfield Road.
- 5.66 There is an above average proportion of well-established leisure service outlets and floorspace in the town centre, reflecting its status as an active and popular tourist destination. The sector comprises 10 cafes, eight restaurants, four take aways, two bars and hotels, a betting office and the Picturedrome music venue.
- 5.67 In terms of financial and business services in Holmfirth, the proportion of outlets occupied by such uses (9.9%) is below the national average figure (11.0%), whilst the proportion of floorspace occupied by such uses (8.6%) is marginally above the national average level (8.3%). The 12 units in the centre comprise five estate agents, four retail banks, one building society, one financial service and one legal service.
- 5.68 There are limited opportunities for major new development within Holmfirth town centre due to a number of constraints, including the steep sided valley location of the town, the small scale nature of the existing commercial units and the conservation area designation. Outside of the main shopping area, there have been two recent foodstore planning applications. In March 2012, planning permission was granted for a new Lidl foodstore at Riverholme Works on Huddersfield Road (planning permission reference 2011/92600) with a gross floorspace of 1,518 sq.m and a maximum net sales area of 1,063 sq.m. The scheme is currently being constructed. An application for a Tesco foodstore at the former Midlothian Garage on New Mill Road (planning application reference 2011/93163) with a gross floorspace of 3,539 sq.m and a net retail area of 2,150 sq.m was refused at committee in July 2012. An appeal was lodged in January 2013, but has not been determined at the time of reporting.
- 5.69 The level of vacancies in Holmfirth is significantly below the national average, with the four vacant units accounting for just 3.3% of all outlets and 2.2% of the total floorspace in the town centre.



- 5.70 Holmfirth is an attractive and historic town, with the conservation area designation helping to ensure that the high environmental quality of the centre is retained. The town has an important role as a tourist destination and attracts large numbers of visitors, particularly during the peak summer months.

Summary

- 5.71 Holmfirth is considered to be a vibrant and popular town, both with local residents and visitors. It accommodates a good variety of retail and service facilities, with a very low level of vacancies. Whilst the town is relatively poorly served in terms of food shopping provision, this will be partly addressed by the Lidl foodstore which is under construction. Accordingly, Holmfirth performs well against a number of the indicators assessed and is considered to be a generally healthy centre.

Conclusion and the Setting of Local Impact Thresholds

- 5.72 WYG's analysis of the key indicators indicates that most of the centres are generally trading well, with Cleckheaton and Holmfirth having vacancy rates which are well below national average. However, Dewsbury has a very large number of vacancies which together account for a considerable amount of floorspace (circa 10,000 sq.m). Whilst we note that a number of these units are currently being refurbished and should have a substantially better chance of being let following this work, the vacancy rate is such that it suggests that the historic level of retail provision in the town is substantially greater than the current retailer demand for premises. Dewsbury has also been hit by the withdrawal of several key national multiple retailers from the town, which is also likely to have impacted on the attractiveness of the town to shoppers.
- 5.73 Huddersfield town centre remains the principal centre in the District, with the planned redevelopment proposals being a positive sign for the town's future. Huddersfield's offer and the type of retailers which are accommodated in the town is not replicated anywhere else in the District and the centre therefore has a very important function in fulfilling comparison goods shopping needs.
- 5.74 Having considered the current performance of the above centres and in accordance with national planning policy, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre retail and leisure development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF. We do not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a 300 sq.m convenience store (which could be operated by Tesco Express, Sainsbury's Local or similar) will likely have a greater impact on a small centre than a similar facility would on Huddersfield. Therefore, in developing an appropriate



policy relating to the assessment of impacts, it is appropriate to have a range of thresholds, depending upon which centre the development applies to.

- 5.75 Accordingly, we would advocate a tiered approach whereby the threshold applied to retail, leisure and office planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of the particular centre within its sphere of influence.
- 5.76 For the Sub-Regional Centre of Huddersfield and the two Large Town Centres of Batley and Dewsbury, it is recommended that development proposals providing greater than 500 sq.m gross floorspace for retail, leisure or office uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around Small Town Centres and District Centres to 300 sq.m gross and around Local and Neighbourhood Centres to 200 sq.m gross. In our experience, it will only generally be development of a scale greater than these thresholds which could lead to a 'significant adverse' impact, which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.
- 5.77 The above thresholds for Small Town, District, Local and Neighbourhood Centres are set at a manner which will generally result in proposals for the leading supermarket operators' smallest format stores having to demonstrate that there would be no unacceptable impacts resulting from the proposed development. Such smaller format M-Local, Sainsbury's Local and Tesco Express (and similar) stores are often able to have significant turnovers and it is therefore considered appropriate to consider the trade diversion associated with such proposals where they are in proximity to smaller centres.
- 5.78 It should be noted that, in accordance with the Government's Practice Guidance on Need, Impact and the Sequential Approach (2009), the scope of supplementary documentation accompanying an application addressing impact should be proportionate to the scale of development being proposed. Accordingly, the Council should expect a more modest submission to justify a 300 sq.m convenience store than it would in support of a large superstore. Furthermore, there may also well be occasions when it is evident (without undertaking a detailed assessment of trade diversion impact) that a new out-of-centre development with a gross floorspace of just over 200 sq.m could not realistically result in an impact of the 'significantly adverse' magnitude which could merit the refusal of a planning application. On such occasions, impact will be able to be dealt with in a very brief manner.
- 5.79 Accordingly, it will be important during pre-application discussions to agree the content of any submission to address the test of retail impact. It may be that smaller proposals can be satisfactorily appraised by the Council accompanied only by a brief statement summarising the likely impacts arising



from development. The setting of a threshold should not result in an overly onerous requirement, whereby an applicant needs to invest significant time and resource to promote relatively straightforward and uncontentious proposals. Instead, it allows the authority to retain appropriate control to ensure that particular scrutiny can be given to those application proposals which genuinely threaten to have an adverse impact on existing defined centres.

5.80 Accordingly, an appropriate future impact threshold policy could read as follows.

'An impact assessment will be necessary for planning applications for retail, leisure and office developments which are not located within a defined centre and which are not in accordance with an up to date development plan, where:

- **The proposal provides a floorspace greater than 500 sq.m gross; or**
- **The proposal is located within 800 metres of the boundary of a Small Town Centre or District Centre and is greater than 300 sq.m gross; or**
- **The proposal is located within 800 metres of the boundary of a Local Centre or Neighbourhood Centre and is greater than 200 sq.m gross.**

The scope and content of any impact assessment should be agreed with the Council during pre-application discussions and should be reflective of the scale, role and function of the development which is being proposed.'

5.81 The proposed policy seeks to provide some certainty as to the areas to which the reduced threshold would apply, with the 800 metres considered to be an achievable walking distance which will broadly correlate with the potential walk-in catchment of smaller centres.



6.0 Population and Expenditure

6.01 This section of the report assesses the current population and available expenditure (for both convenience and comparison goods) within the Study Area.

Study Area Population

6.02 The population within each postal code sector has been calculated using Experian Micromarketer G3 data (2011 estimate, which was issued in September 2012). The baseline population data takes into consideration the findings of the recent 2011 Census release which has then been projected forward using Experian Micromarketer G3 data (which utilises growth rates which take into account Office for National Statistics population projections and current age and gender estimates).

6.03 For the purpose of this Study, population and expenditure has been calculated at five year intervals to 2028 (i.e. at 2013, 2018, 2023 and 2028).

6.04 On this basis, the defined Study Area is estimated to contain a resident population of approximately 615,401 people at 2013 rising to 674,595 people at 2028. This represents an increase in population within the Study Area of 59,194 people (equating to an increase of 9.6%) between 2013 and 2028. In the zones which most closely correspond to the Kirklees administrative area (these being Zones 1, 2, 4, 5, 6, 7, 8 and 9), we note that the population increases from 428,102 in 2013 to 468,676 in 2028, an increase of 40,574.

6.05 We consider this projected increase to be generally consistent with the level of housing proposed by the now withdrawn Submission draft of the Kirklees Core Strategy, which identified a requirement for 22,470 dwellings between 2010 and 2028, which equates to an average annual requirement for 1,250 dwelling completions. When this completion rate is applied to the 20 year period between 2013 and 2028, it equates to a total of 18,750 dwellings. If we then take estimated population increase of 40,574 and divide it by the 18,750 dwellings, the result is an assumed occupancy rate of 2.2 persons per dwelling. We consider such an occupancy rate to be in line with expectations and for Experian's population estimates to broadly correlate with the growth that the Submission Draft of the Core Strategy planned for.

6.06 Whilst we are aware that the Council is currently reviewing the future housing needs of the District, it should be noted that quite significant increases in population are required to support additional new retail facilities. By way of example, the Experian Micromarketer G3 data sourced for this Study



suggests that the average per capita expenditure on convenience goods across the Study Area is in the order of £1,636 at 2013 (in 2011 prices, after deductions have been made for expenditure committed through special forms of trading). Accordingly, even if the population of Kirklees was 5,000 persons greater than previously estimated at 2013, this would only increase the available pot of convenience goods expenditure by just over £8m. Given that a typical food superstore may turn over around four or five times this figure, it is evident that substantial increases in population are required to have a material impact on the overall findings of a Study such as this. This is equally applicable to comparison goods retail provision. Notwithstanding this, appropriate consideration should be given to the impact which any additional planned increases in Kirklees’ population may have in retail needs going forward.

6.07 Table 6.1 provides a detailed breakdown of the forecast population change within each survey zone in each of the reporting periods to 2028.

Table 6.1: Study Area Population by Survey Zone (2013 to 2028)

Zone	2013	2018	2023	2028
1	54,991	57,544	59,899	61,934
2	62,313	64,520	66,548	68,477
3	51,638	53,279	54,851	56,128
4	71,105	72,911	74,461	75,828
5	56,675	58,028	59,477	60,600
6	42,690	43,500	44,048	44,547
7	34,551	35,168	35,679	36,132
8	62,416	65,584	68,700	71,625
9	43,361	45,552	47,587	49,533
10	135,661	140,866	145,461	149,791
Total	615,401	636,952	656,711	674,595

Source: Experian Micromarketer G3 data

Retail Expenditure

6.08 In order to calculate per capita convenience and comparison goods expenditure, WYG has again utilised Experian Micromarketer G3 data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.



6.09 The base year for the Experian expenditure data is 2011. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 11, which was published in October 2013. For the purposes of this Study, the following annual growth forecasts set out below by Table 6.2 have been applied.

Table 6.2: Expenditure Growth Forecasts

Year	Convenience (%)	Comparison (%)
2012	-0.6	3.1
2013	-0.6	3.2
2014	-0.3	2.3
2015	0.1	2.8
2016	0.6	2.9
2017	0.9	2.9
2018	0.8	3.1
2019	0.9	3.1
2020	0.9	3.0
2021	0.9	3.0
2022	0.9	2.9
2023	0.9	2.9
2024	0.9	2.9
2025	0.8	2.9
2026	0.7	2.8
2027	0.7	2.9
2028	0.8	2.9

Source: Figure 1a, Retail Planner Briefing Note 11 (October 2013)

6.10 The latest growth forecasts suggest that the current downturn in the economy will continue to impact upon future convenience goods expenditure, at least in the short term. However, over the medium to long term it is expected that the forecast levels of growth will increase as the economy recovers. For convenience goods, Experian forecasts negative growth to 2014, before identifying a modest forecast increase of 0.1% at 2015. Experian identifies an estimated convenience goods increase of +0.9% at 2017 and, although some deviation in the rate is forecast thereafter, the rate of annual convenience goods growth forecast to 2030 does not fall below +0.7%.

6.11 By contrast Experian identifies an immediate and relatively strong annual comparison growth rate of +3.1% and +3.2% at 2012 and 2013 respectively. Whilst a drop in the rate of growth is anticipated at 2014 (to +2.3%), growth rates thereafter are forecast to be relatively stable, ranging from +2.8% to +3.1%.



- 6.10 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long are reflective of any changes to relevant available data.
- 6.11 Experian Retail Planner Briefing Note 11 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. We have 'stripped out' any expenditure which survey respondents indicated was committed via special forms of trading and instead have made an allowance derived from Experian's recommendation.
- 6.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.
- 6.13 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, we adopt Experian's 'adjusted' figure (provided at Appendix 3 of its Briefing Note) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Table 6.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

Table 6.3: Special Forms of Trading Forecasts

Year	Convenience	Comparison
2013	2.5%	10.8%
2018	3.8%	14.5%
2023	4.8%	15.9%
2028	5.4%	16.0%

Source: Appendix 3, Experian Retail Planner Briefing Note 11 (October 2013)

- 6.14 Using the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2013, 2018, 2023, 2028 and 2031. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.



Convenience Goods Expenditure

6.12 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2013, the resident population of the Study Area generates some £1,006.88m of convenience goods expenditure²⁹. This is forecast to increase to £1,179.62 at 2028, which represents an increase of £178.78m (or 17.9%) between 2013 and 2028.

Table 6.4 Total Available Study Area Expenditure – Convenience (£m)

2013	2018	2023	2028	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028
1,000.84	1,043.01	1,112.24	1,179.62	42.17	111.40	178.78

Source: Table 2, Appendix 7

Main Food and 'Top-Up' Shopping

6.13 The proportion of convenience goods expenditure which is committed through main food shopping trips and through 'top-up' shopping trips has been estimated with reference to respondents' answers to Question 5 and Question 15 of the household survey, which ask respondents to estimate their weekly main food shopping expenditure and weekly top-up shopping expenditure respectively. We have analysed responses to these questions to derive an estimate of the split between main and top-up expenditure on a zonal basis. Across the whole of the Study Area, we calculate (by adding together our estimates of the monetary split between main and top up shopping expenditure within each zone) that the proportion of convenience goods expenditure directed to respondents' main food shopping destination equates to 80.6% of their overall convenience shopping expenditure. The remaining 19.4% of expenditure (which will typically be spent on regular purchases such as milk, bread and so on) is therefore attributed to the respondents' top-up convenience shopping destination. Our estimate of the split between these two types of expenditure on a zonal basis is provided below at Table 7.5.

²⁹ Expressed in 2011 prices, as is every subsequent monetary value



Table 7.5: Assumed Split of Convenience Goods Expenditure Between Main and Top-Up Shopping

Zone	Main Food (%)	Top-Up (%)
1	79.6	20.4
2	79.0	21.0
3	82.7	17.3
4	79.1	20.9
5	80.7	19.3
6	83.0	17.0
7	81.3	18.7
8	79.3	20.7
9	80.7	19.3
10	81.2	18.8

Source: Table 2B, Appendix 7

- 6.14 By applying these estimates to the identified resident population of the Study Area, convenience goods expenditure at 2013 committed through 'main food' shopping trips is estimated to be £806.94m and through 'top up' shopping trips is estimated to be £193.90m.

Comparison Goods Expenditure

- 6.15 At 2013, it is estimated that the resident population of the Study Area generates £1,481.99m of comparison goods expenditure, which is forecast to increase to £2,336.77m at 2028. This represents an increase of £854.77m (or 57.7%) between 2013 and 2028. Whilst this increase is clearly very significant indeed, it is a more modest rate than has previously been achieved due to the more circumspect level of comparison goods growth which is forecast over the short and medium term (and due to the expectation that an ever increasing proportion of comparison goods expenditure will be committed through internet shopping). As a consequence, the identified comparison goods expenditure growth of £204.06m within the Study Area between 2013 and 2018 represents a 13.8% increase.

Table 6.6 Total Available Study Area Expenditure – Comparison (£m)

2013	2018	2023	2028	Growth 2013-2018	Growth 2013-2023	Growth 2013-2028
1,481.99	1,686.05	1,948.27	2,336.77	204.06	466.28	854.77

Source: Table 10, Appendix 7

- 6.16 For the purposes of this Study, comparison goods expenditure has been divided into nine sub-categories: 'Furniture', 'DIY', 'Gardening Goods', 'Electrical' (these four categories collectively being referred to as bulky goods), 'Clothing & Footwear', 'CDs, DVDs and Books', 'Small Household Goods',



'Toys, Games, Bicycles and Recreational Goods' and 'Health and Beauty/Chemist Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

6.17 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.



7.0 Capacity in Kirklees by Zone

- 7.01 WYG has examined the need for new convenience and comparison goods floorspace over five year reporting periods to 2028. At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time. In any event, any identified need or capacity identified beyond 2018 should not necessarily be viewed as justification of new retail floorspace outside of centres as this could prejudice the implementation of any emerging town centre redevelopment strategies and the development of more central sites which may be currently available or which could become available over time.
- 7.02 A complete series of quantitative capacity tables are provided at Appendix 7 to provide further detail in terms of the step-by-step application of the Study methodology.

Capacity Formula

- 7.03 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 or Deficit (£m).
- 7.04 **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 expenditure is estimated with reference to a number of factors, namely:
- Growth in population;
 - Growth in expenditure per person per annum; and
 - Special Forms of Trading (e.g. catalogue shopping / internet).
- 7.05 **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 Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales density for all major multiple retailers.



- 7.06 **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 suggest an over provision of retail facilities (and in these circumstances it would prove difficult to justify additional floorspace).
- 7.07 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, electrical retailers such as Currys (which is considered a bulky goods retailer) have a much higher sales density than other bulky goods retailers such as B&Q, and clothing and footwear (non-bulky goods) operators generally have a higher sales density than bulky goods retailers.

Capacity for Future Convenience Goods Floorspace

- 7.08 In order to ascertain the likely need for additional convenience goods floorspace in Kirklees, it is first necessary to consider the performance of the current provision. Given the geography of the District, and its reasonably retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to Kirklees will be commensurate with its current market share. For each zone, it is also assumed that the future expenditure available to the centre will be consistent with its current market share.
- 7.09 Table 7.1 below indicates the current trading position compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2028 assuming that the identified market share remains constant. The 'benchmark' turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller-scale convenience stores, we have assumed that stores are trading 'at equilibrium' (i.e. the survey-derived turnover equates to the expected level of turnover).
- 7.10 For each retail destination, consideration has been given as to whether any of its turnover is likely to be derived as 'inflow' from outside the Study Area. Our judgement in this regard has been informed



by a comprehensive review of the patterns of spending identified by retail studies undertaken in the neighbouring authorities of Bradford, Calderdale and Wakefield. The Study Area which has been defined for this Study incorporates southern parts of the Leeds administrative area and, given the strong offer provided by the regional centre of Leeds, we do not consider it necessary to make a further allowance for inflow from other parts of the District. We have identified all expenditure which flow to Kirklees from that part of the Study Area for the above three studies which lies outside of the adopted Kirklees Study Area (to ensure no 'double counting' of expenditure patterns). However, given the size of the Study Area, the allowance made for inflow is relatively limited. The exact level of inflow allowed for at base year 2013 is set out at Table 5 (for convenience goods) and Table 29 (for comparison goods) of Appendix 7.

- 7.11 As this assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, the typical ratio between convenience/comparison goods provision for operators³⁰ has been applied to the estimated net floorspace of each foodstore³¹. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.
- 7.12 Whilst survey results are commonly accepted as a means by which to identify existing shopping patterns, their findings should be treated with a 'note of caution' as they tend to have a bias towards larger stores and can understate the role of smaller stores and independent retailers.
- 7.13 Table 7.1 indicates that, based on the current market share of existing facilities within the Kirklees administrative area (including town centres, local centres, freestanding stores and so on), existing facilities achieve a convenience goods turnover of £667.95m at 2013. This equates to a market share of 66.3% of all convenience goods expenditure generated by residents within the Study Area. This figure is significantly in excess of the estimated benchmark turnover of the existing convenience goods floorspace and, after account is taken of convenience goods inflow from outside the Study Area, we identify a substantial expenditure surplus of £155.94m at 2013. Table 7.1 is derived from Tables 5 and 6a of Appendix 7 which provide full details of all of inputs and assumptions relied upon in calculating this surplus.

³⁰ Derived from Verdict UK Food & Grocery Retailers (2012). Where Verdict data is not available or is considered not to appropriately reflect how a store trades in practice, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 7

³¹ Net sales areas have been sourced from Institute of Grocery Distribution data where available. Where such data is not available, we have applied professional judgement in the manner set out in the notes to Table 5 of Appendix 7



Table 7.1: Quantitative Need for Convenience Goods Floorspace in Kirklees District

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	524.94	677.40	152.46
2018	515.01	705.94	190.93
2023	516.56	752.80	236.24
2028	519.15	798.40	279.26

Source: Table 6A of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (66.3%) claimed by facilities within Study Area and includes inflow from outside Study Area
2011 Prices

- 7.14 We have 'rolled forward' the Study Area's current market share (of 66.3%) in order to identify the likely convenience goods floorspace requirement to allow the District to continue to meet the convenience shopping needs of its residents. On this basis, given the limited forecast increases in convenience goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2018 there will be an expenditure surplus of £190.93m to support additional convenience goods floorspace within the Study Area. This surplus is forecast to increase to £236.24m at 2023 and to £279.26m at 2028. Account has been made for the turnover efficiency of existing convenience goods floorspace to change (on the basis that operators have historically been able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4a of Experian Retail Planner Briefing Note 11 (these being -1.2% at 2014, -0.7% at 2015, +0.0% per annum between 2016 and 2020, and +0.1% between 2021 and 2028).
- 7.15 This initial analysis does not take into account existing convenience goods floorspace commitments, which we set out over the page at Table 7.2 and which we estimate will have a combined benchmark turnover of £58.13m at 2011 prices, if all were operational at base year 2013. Particularly significant foodstore development is proposed in the form of the proposed Tesco superstore at Southgate, Huddersfield (which we estimated would have a convenience goods turnover, over and above Tesco's existing store at Viaduct Street which would cease to trade, of £26.76m at 2013) and the proposed extensions to the Asda at Mill Street West in Dewsbury and to the Morrisons at Station Street in Meltham (which we estimate would have respective turnovers of £7.48m and £11.98m).
- 7.16 Planning permission reference 2009/91958, which provides for the erection of a replacement Tesco store at Cleckheaton, has not been included in our table of commitments, as we believe that the proposal no longer forms part of Tesco's new store programme. This is consistent with Tesco's recent



change in focus – principally towards smaller convenience stores – and, as a consequence, a number of schemes across the country which have planning permission are no longer being pursued. As such, we do not consider it likely that planning permission reference 2009/91958 will be implemented in the foreseeable future and, as such, have excluded it from the list of commitments.

Table 7.2: Extant Convenience Commitments within the Study Area

Zone	Location	Planning Application Reference	Proposal	Net Conv Sales (sq.m)	Conv Sales Density (£ per sq.m)	Estimate Turnover at 2013 (£m)	Status
1.	Huddersfield In and Edge	2009/93675	Erection of replacement Tesco store (Class A1) with petrol filling station, car parking, landscaping and associated works at Southgate, Huddersfield	2,487	10,760	26.76	Extant permission
2.	'Other Zone 2'	2012/90310	Erection of mixed-use office and retail development with associated car parking at former Tandem PH car park, Wakefield Rd, Huddersfield	146	5,000	0.73	Extant permission
4.	Cleckheaton In and Edge	2009/92638	Proposed discount foodstore at Horncastle Street, Cleckheaton	998	5,255	5.25	Extant permission
4.	'Other Zone 4'	2012/91320	Outline permission for mixed-use development comprising A1 and B1 uses at Fountain Works, Roberttown	218	8,729	1.90	Extant permission
5.	'Other Zone 5'	2012/92593	Erection of food retail unit, formation of amended access, delivery and plant yard and installation of an ATM at Colne Valley Business Park	280	5,000	1.40	Extant permission
5.	'Other Zone 5'	2013/91257	Erection of two A1 retail units at Halifax Road, Birchcliffe	245	11,864	2.91	Extant permission
7.	Holmfirth Outside Centre	2011/92600	Demolition of existing building and erection of foodstore (Lidl) with associated car park, landscaping and highway works at Riverholme Works, Holmfirth	850	3,034	2.58	Under construction
7.	'Other Zone 7'	2012/91214	Erection of extension to store, car parking and access work at Morrisons, Station Street, Meltham	488	12,817	6.25	Extant
8.	Dewsbury In and Edge	2012/90049	Extension of time for planning permission ref 2007/93354 which provides for the erection of a 1,194 sq.m gross mezzanine at the existing Asda, Mill Street West, Dewsbury	597	12,536	7.48	Extant
9.	Batley Outside Centre	2009/93382	Erection of retail development at Cross Rink Street, Batley	615	2,500	1.54	Under construction
9.	Batley In and Edge	2013/92416	Extension to existing foodstore	178	7,476	1.33	Extant
Total				7,102		58.13	

Source: Table 7 of Appendix 7
2011 Prices



- 7.17 After account is made for the estimated £58.13m convenience goods turnover of commitments, it is evident that there is still substantial quantitative need for additional convenience goods floorspace within the District at 2013. Table 7.3 indicates that this need equates to an expenditure residual of £97.80m at 2013 which would support between 8,200 sq.m and 19,600 sq.m of additional net sales floorspace. The minimum figure is based on the identified need being met by one of the leading five foodstore operators (Asda, Morrisons, Sainsbury's Tesco and Waitrose) and is derived from the application of an average of their company average sales densities. The higher figure is based upon the need being met by a discount or local independent retailer, which could have a sales turnover in the order of £5,000 per sq.m.
- 7.18 Assuming once again that Kirklees' market share of 66.3% is 'rolled forward' in the period to 2028 (and allowing for improvements in the sales efficiency of both existing and committed floorspace), we estimate that the identified expenditure residual will increase to £133.90m at 2018, to £179.03m at 2023, and to £221.77m at 2028. This will result in a significant increased need throughout the District over the medium to long term, equating to a net convenience goods floorspace requirement of between 11,200 sq.m and 26,600 sq.m at 2018, increasing to between 14,900 sq.m and 35,300 sq.m at 2023, and to between 18,200 and 43,300 sq.m at 2028.
- 7.19 Whilst there are obviously a number of ways in which such identified needs can be met, food superstores usually provide upwards of 2,000 sq.m of convenience goods floorspace, and it is therefore evident that there is an immediate need which could support around three food superstores in the District and that a further number could be supported over the medium to long term.

Table 7.3: Quantitative Need for Convenience Goods Floorspace in Kirklees District with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	152.46	58.13	94.32	7,900	18,900
2018	190.93	57.06	133.90	11,200	26,600
2023	236.24	57.20	179.03	14,900	35,300
2028	279.26	57.49	221.77	18,200	43,300

Source: Table 8A of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013 (based on WYG knowledge of trading performance of local convenience retailers)

2011 Prices



7.20 Having identified convenience goods needs on a District-wide basis, it is advantageous to consider future needs on a more localised basis and to determine the quantum of floorspace which could be directed to different zones within Kirklees District. Where zones are split between different local authority areas, we have only considered that part of the zone which lies within the Kirklees authority area.

7.21 The zonal analysis assumes that existing market shares within each zone will be maintained going forward. However, in reality, significant development will result in changes in shopping patterns and the commentary which follows should be considered in this context. Table 7.4 below sets out the principal centres in Kirklees by zone. Only very small parts of Zone 3 and 10 lie within Kirklees authority area and they contain no significant retail provision. They have therefore been omitted from the commentary which follows.

Table 7.4: Principal Centres in Kirklees by Zone

Zone	Centres
1	Huddersfield
4	Cleckheaton, Heckmondwike and Mirfield
5	Marsden and Slaithwaite
6	Denby Dale, Kirkburton and Skelmanthorpe
7	Holmfirth, Honley and Meltham
8	Dewsbury
9	Batley and Birstall

Zone 1

7.22 Convenience goods retail provision in Zone 1 claims 15.0% of overall convenience goods expenditure which originates within the Study Area, which (after account is taken for inflow from outside the Study Area) equates to a turnover of £150.14m at 2013. Due to the 'overtrading' of existing facilities (most notably the Sainsbury's store at Southgate in Huddersfield which turns over £32.50m more than its expected benchmark turnover at 2013), a significant expenditure surplus of £32.56m is identified at 2013 to support additional convenience goods floorspace. As Table 7.5 below sets out, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, we estimate that the identified expenditure surplus will increase to £41.11m at 2018, to £51.15m at 2023, and to £60.67m at 2028.



Table 7.5: Quantitative Need for Convenience Goods Floorspace in Zone 1

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	117.58	150.14	32.56
2018	115.36	156.47	41.11
2023	115.71	166.85	51.15
2028	116.29	179.96	60.67

Source: Table 6B of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (15.0%) claimed by facilities within Zone 1 and includes inflow from outside Study Area
2011 Prices

- 7.23 As previously identified at paragraph 7.15, there is a significant existing commitment in the form of the extant planning permission for a replacement Tesco superstore at Southgate. It is proposed that the Southgate store will have a convenience sales area which is around 2,487 sq.m greater than that provided at the existing Tesco store at Viaduct Street, which will close as a result of the development. We estimate that the additional floorspace would turn over £26.76m if trading at 2013.
- 7.24 Table 7.6 below indicates that this commitment will extinguish much of the need for additional convenience floorspace in Zone 1 over the short term, with the residual of £5.80m which remains equating to a convenience goods floorspace requirement of between 500 sq.m and 1,200 sq.m at 2013. We estimate that the identified need will equate to an increased net convenience goods floorspace requirement of between 1,200 sq.m and 3,000 sq.m at 2018, increasing to between 2,100 sq.m and 4,900 sq.m at 2023, and to between 2,800 sq.m and 6,700 sq.m at 2028. Accordingly, there may well be a need for further substantial foodstore provision in Zone 1 to serve Huddersfield over the medium to longer term. It should be noted, however, that part of Zone 1's market share originates in other zones, including Zone 5, where there may be substantial potential to provide additional foodstore provision to 'claw back' expenditure currently lost to the zone. We consider this issue in greater detail towards the end of this section.



Table 7.6: Quantitative Need for Convenience Goods Floorspace in Zone 1 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	32.56	26.76	5.80	500	1,200
2018	41.11	26.25	14.85	1,200	3,000
2023	51.15	26.33	24.81	2,100	4,900
2028	60.67	26.46	34.21	2,800	6,700

Source: Table 8B of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Zone 2

- 7.25 Whilst Zone 2 does not contain a principal centre, it forms the northern part of the Huddersfield conurbation and, thus, at least some of the need identified in Zone 2 could be met through further provision in and around Huddersfield town centre.
- 7.26 Zone 2 convenience goods retail provision claims 15.6% of overall convenience goods expenditure which originates within the Study Area, which (after account is taken for inflow) equates to £157.48m at 2013. Due to the 'overtrading' of existing facilities (most notably the Asda store at Longhill Road and the Morrisons store at Penistone Road in Huddersfield which together turn over £49.21m more than their expected benchmark turnover at 2013), a significant expenditure surplus of £52.06m to support additional convenience goods floorspace is identified at 2013. Table 7.7 below indicates that, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, an estimated increased expenditure surplus of £60.69m is identified at 2018, increasing to £71.27m at 2023, and to £81.35m at 2028.

Table 7.7: Quantitative Need for Convenience Goods Floorspace in Zone 2

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	105.42	157.48	52.06
2018	103.43	164.11	60.69
2023	103.74	175.01	71.27
2028	104.26	185.61	81.35

Source: Table 6C of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (15.6%) claimed by facilities within Zone 2 and includes inflow from outside Study Area
2011 Prices



- 7.27 We are aware of a single convenience goods commitment in Zone 2, this being the extant planning permission to provide a convenience store on the site of the former Tandem public house at Wakefield Road in Huddersfield. We estimate that this store would have a net convenience goods sales area of 146 sq.m and would turn over around £0.73m if trading at 2013.
- 7.28 Given the limited nature of the existing commitment in Zone 2, it is evident that there is still substantial need for additional convenience goods facilities in the short term, with the identified residual of £51.33m at 2013 equating to a convenience goods floorspace requirement of between 4,300 sq.m and 10,300 sq.m at 2013. We estimate that the identified need will equate to an increased floorspace requirement of between 5,000 sq.m and 11,900 sq.m at 2018, increasing again to between 5,900 sq.m and 13,900 sq.m at 2023, and to between 6,600 sq.m and 15,700 sq.m at 2028. The identified need is very substantial and could possibly support around two food superstores over the short term and around three superstores in the longer term.

Table 7.8: Quantitative Need for Convenience Goods Floorspace in Zone 2 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	52.06	0.73	51.33	4,300	10,300
2018	60.69	0.72	59.97	5,000	11,900
2023	71.27	0.72	70.55	5,900	13,900
2028	81.35	0.72	80.63	6,600	15,700

Source: Table 8C of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Zone 4

- 7.29 Zone 4 accommodates the centres of Cleckheaton, Heckmondwike and Mirfield and therefore attracts a relatively high 10.4% market share of convenience goods Study Area expenditure. After account is made for inflow, this equates to a survey-derived convenience goods turnover of £106.75m for destinations within the zone.
- 7.30 Two stores in Zone 4 significantly 'overtrade', namely the Morrisons at Union Street in Heckmondwike and the Tesco at Northgate in Cleckheaton (by £24.88m and by £13.40m respectively). As a consequence, across Zone 4, an expenditure surplus of £42.26m is identified to support additional



convenience goods floorspace at 2013. As set out by Table 7.9, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, we estimate that the surplus will increase to £47.94m at 2018, to £55.10m at 2023, and to £61.93m at 2028.

Table 7.9: Quantitative Need for Convenience Goods Floorspace in Zone 4

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	63.85	106.12	42.26
2018	62.65	110.59	47.94
2023	62.84	117.93	55.10
2028	63.15	125.08	61.93

Source: Table 6D of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (10.4%) claimed by facilities within Zone 4 and includes inflow from outside Study Area
2011 Prices

- 7.31 We are aware of a two extant convenience goods planning permissions in Zone 4, namely the permission for a discount foodstore at Horncastle Street in Cleckheaton and the permission for a mixed-use development including convenience store at Fountain Works at Roberttown. We estimate that these two planning permissions would turn over in the order of £5.25m and £1.90m respectively at 2013.
- 7.32 Such commitments are relatively modest in scale and, as a consequence, after account is made of them it is evident that there remains a significant need for additional convenience goods facilities across the zone in the short term. Table 7.10 indicates that there is an estimated residual of £35.12m at 2013 equating to a convenience goods floorspace requirement of between 3,000 sq.m and 7,000 sq.m at 2013. We anticipate that the identified floorspace requirement will increase to between 3,400 sq.m and 8,100 sq.m at 2018, to between 4,000 sq.m and 9,500 sq.m at 2023, and to between 4,500 sq.m and 10,700 sq.m at 2028. The identified need could support one food superstore over the short term or a greater number of smaller stores.



Table 7.10: Quantitative Need for Convenience Goods Floorspace in Zone 4 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	42.26	7.15	35.12	3,000	7,000
2018	47.94	7.01	40.93	3,400	8,100
2023	55.10	7.04	48.06	4,000	9,500
2028	61.93	7.07	54.86	4,500	10,700

Source: Table 8D of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Zone 5

- 7.33 Zone 5 attracts a relative modest 3.5% of convenience goods Study Area expenditure which is a consequence of the principal centres it accommodates – Marsden and Slaithwaite – having a relatively limited convenience goods provision.
- 7.34 Our assessment indicates that the existing floorspace in Zone 5 overtrades significantly (most notably the Aldi at Scar Lane which trades an estimated £9.30m above its anticipated benchmark turnover at 2013). Accordingly, once account has been taken for inflow, we identify an estimated expenditure surplus of £11.14m at 2013. Table 7.11 sets out our estimate that, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, the convenience goods expenditure surplus apparent in Zone 5 will increase to £13.09m at 2018, to £15.46m at 2023, and then to £17.72m at 2028.

Table 7.11: Quantitative Need for Convenience Goods Floorspace in Zone 5

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	24.19	35.33	11.14
2018	23.73	36.82	13.09
2023	23.80	39.26	15.46
2028	23.92	41.64	17.72

Source: Table 6E of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (3.5%) claimed by facilities within Zone 5 and includes inflow from outside Study Area
2011 Prices



- 7.35 There are two modest extant convenience goods retail commitments evident in Zone 5 at the time of reporting, these taking the form of convenience stores at Colne Valley Business Park in Linthwaite and at Halifax Road in Birchenclyffe. We estimate that these stores would have a combined turnover of around £4.31m if trading at 2013.
- 7.36 After taking account of both of these commitments, the identified residual of £6.84m at 2013 would support an additional 600 sq.m to 1,400 sq.m of additional net floorspace. We estimate that the identified increased need over future years will result in an increased floorspace requirement of between 700 sq.m and 1,800 sq.m at 2018, increasing to between 900 sq.m and 2,200 sq.m at 2023, and to between 1,100 sq.m and 2,600 sq.m at 2028. Whilst the current need could only likely support a discount foodstore or a local independent operator, it should again be noted that our quantitative analysis is based on the retention of a zone's existing market share and that qualitative benefits may be delivered through the implementation of additional floorspace in order to 'claw back' expenditure which leaks out of the zone to destinations further afield.

Table 7.12: Quantitative Need for Convenience Goods Floorspace in Zone 5 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	11.14	4.31	6.84	600	1,400
2018	13.09	4.23	8.86	700	1,800
2023	15.46	4.24	11.22	900	2,200
2028	17.72	4.26	13.46	1,100	2,600

Source: Table 8E of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Zone 6

- 7.37 Whilst covering a substantial geographic area (which spans the local authority boundary across to Wakefield), Zone 6 is largely rural in nature with local needs retail provision being provided in the centres of Kirkburton and Skelmanthorpe. Such centres do not accommodate any substantial supermarkets and the zone's share of Study Area convenience goods expenditure is limited to just 0.8% as a result.
- 7.38 Our assessment indicates that the existing floorspace in Zone 6 trades very slightly below benchmark at 2013 and given the zone's limited claim on expenditure, we do not identify any real need for



additional convenience goods floorspace across the entire reporting period to 2028 based on the retention of the identified market share. Our estimate of this small 'negative surplus' to 2023 is set out below by Table 7.13. By 2028, a small positive surplus of £0.23m is apparent.

Table 7.13: Quantitative Need for Convenience Goods Floorspace in Zone 6

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	9.70	8.33	-1.37
2018	9.52	8.68	-0.83
2023	9.54	9.26	-0.29
2028	9.59	9.82	0.23

Source: Table 6F of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (0.8%) claimed by facilities within Zone 6 and includes inflow from outside Study Area
2011 Prices

7.39 There are no known commitments within Zone 6. Given that we do not identify any significant positive expenditure surplus to convert into a floorspace requirement, we do not provide a table setting out future floorspace requirements in Zone 6.

Zone 7

7.40 Zone 7 attracts 5.0% of convenience goods Study Area expenditure which is again a consequence of the principal centres it accommodates – Holmfirth, Honley and Meltham – having a relatively limited convenience goods provision. Two supermarkets are located within Zone 7, namely the Co-operative foodstore at Market Street in Holmfirth and the Morrisons at Station Street in Meltham. However, we note that the household survey suggests that the Co-operative store trades only moderately well whilst the Morrisons overtrades significantly (by around £19.85m at 2013).

7.41 Once account has been taken for identified inflow, we identify an estimated expenditure surplus across Zone 7 of £17.42m at 2013. Table 7.14 indicates that, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, we estimate that the identified expenditure surplus will increase to £20.12m at 2018, to £23.46m at 2023, and to £26.64m at 2028.



Table 7.14: Quantitative Need for Convenience Goods Floorspace in Zone 7

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	32.19	49.61	17.42
2018	31.58	51.70	20.12
2023	31.68	55.14	23.46
2028	31.83	58.48	26.64

Source: Table 6G of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (5.0%) claimed by facilities within Zone 7 and includes inflow from outside Study Area
2011 Prices

7.42 We are aware of two convenience goods commitments in Zone 7 at the time of reporting, these being the planned extension to the existing Morrisons store at Meltham (which we estimate would have an expected turnover of £6.25m if trading at 2013) and the erection of a Lidl supermarket at Holmfirth (with an estimated turnover of £2.58m at 2013).

7.43 After taking account of both of these commitments, we identify an estimated residual for Zone 7 of £8.83m at 2013 which supports an additional 700 sq.m to 1,700 sq.m of additional net floorspace. As set out in the below Table 7.15, we estimate that the identified increase in residual expenditure over subsequent reporting years equates to a floorspace requirement of between 1,000 sq.m and 2,300 sq.m at 2018, increasing to between 1,200 sq.m and 2,900 sq.m at 2023, and to between 1,500 sq.m and 3,500 sq.m at 2028. The identified need would support a small supermarket at 2013 and a greater scale of provision in the medium to long term.

Table 7.15: Quantitative Need for Convenience Goods Floorspace in Zone 7 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	17.42	8.83	8.59	700	1,700
2018	20.12	8.67	11.46	1,000	2,300
2023	23.46	8.69	14.77	1,200	2,900
2028	26.64	8.74	17.91	1,500	3,500

Source: Table 8G of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices



Zone 8

- 7.44 Zone 8 attracts 8.9% of all convenience goods Study Area expenditure which principally reflects the fact that Dewsbury is located within the zone. Dewsbury accommodates a number of main food and discount convenience goods shopping destinations, the best performing of which is the Asda at Mill Street West in Dewsbury, which we estimate turns over approximately £51.63m at 2013 (about £18.43m above its expected benchmark). However, the household survey suggests that other stores – including the Morrisons at Huddersfield Road in Ravensthorpe – trade below their expected benchmark level.
- 7.45 After account has once more been taken of identified inflow from surrounding authority areas, we identify a modest expenditure surplus of £4.44m at 2013. Table 7.14 sets out our estimate that, after taking account of expected increases in convenience goods expenditure and allowing for improvements in the sales efficiency of existing floorspace, the identified expenditure surplus will increase to £10.29m at 2018, to £16.74 at 2023, and to £22.82m at 2028.

Table 7.16: Quantitative Need for Convenience Goods Floorspace in Zone 8

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	92.72	97.17	4.44
2018	90.97	101.26	10.29
2023	91.24	107.98	16.74
2028	91.70	114.52	22.82

Source: Table 6H of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (8.9%) claimed by facilities within Zone 8 and includes inflow from outside Study Area
2011 Prices

- 7.46 We are aware of a single extant convenience goods commitment in Zone 8, this being the planning permission to extend the existing Asda store at Mill Street West in Dewsbury. We estimate that the convenience goods floorspace associated with this proposal would have an expected turnover of £7.48m if trading at 2013.
- 7.47 After accounting for this commitment, we find that there will be a negative convenience goods expenditure residual at 2013, but a modest requirement for additional floorspace at 2018 equating to between 200 sq.m and 600 sq.m. As set out in the below Table 7.17, we estimate that identified expenditure residual will increase over subsequent reporting period such that it would support between 800 sq.m and 1,800 sq.m of convenience goods sales floorspace at 2023, increasing to



between 1,300 sq.m and 3,000 sq.m at 2028. The identified need would only support a new supermarket towards the end of the reporting period.

Table 7.17: Quantitative Need for Convenience Goods Floorspace in Zone 8 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	4.44	7.48	-3.04	-300	-600
2018	10.29	7.34	2.95	200	600
2023	16.74	7.36	9.37	800	1,800
2028	22.82	7.40	15.42	1,300	3,000

Source: Table 8H of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Zone 9

7.48 Zone 9 attracts 6.9% of all convenience goods Study Area expenditure, principally as a result of the expenditure claimed by destinations in Batley, including the Tesco Extra at Bradford Road. Whilst the Tesco Extra store trades relatively well (turning over an estimated £49.42m of convenience goods expenditure at 2013 compared to anticipated benchmark turnover of £44.26m), facilities within Zone 9 as a whole trade below expected levels.

7.49 As a consequence, Table 7.18 below identifies a negative expenditure surplus at 2013 and 2018 after account has once more been taken of identified inflow from surrounding authority areas. Subsequent growth in per capita convenience goods expenditure and in population means that a small surplus of £3.15m is evident at 2023, increasing to £7.59m at 2028.

Table 7.18: Quantitative Need for Convenience Goods Floorspace in Zone 9

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	77.70	71.64	-6.06
2018	76.26	74.66	-1.57
2023	76.46	79.61	3.15
2028	76.84	84.43	7.59

Source: Table 6I of Appendix 7

¹ Benchmark turnover to increase in line with improvements in turnover efficiency set out in Table 4a of Experian Retail Planner 11 (October 2013)

² Assumes constant market share of Study Area expenditure (6.9%) claimed by facilities within Zone 9 and includes inflow from outside Study Area
2011 Prices



- 7.50 We are aware of two modest convenience floorspace commitments in Batley which we estimate would have a combined convenience goods turnover of around £2.87m if trading at 2013.
- 7.51 After accounting for these commitments, we find that there is only a real need for additional floorspace at the end of the reporting period only, equating to between 400 sq.m and 900 sq.m of convenience goods sales floorspace.

Table 7.19: Quantitative Need for Convenience Goods Floorspace in Zone 9 with Account Made for Commitments

Year	Convenience Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	-6.06	2.87	-8.93	-800	-1,800
2018	-1.57	2.81	-4.39	-400	-900
2023	3.15	2.82	0.33	0	100
2028	7.59	2.84	4.76	400	900

Source: Table 8I of Appendix 7

¹ Average sales density assumed to be £11,867 per sq.m (based on the average sales density of the leading five supermarkets as identified by Verdict 2012) at 2013

² Average sales density assumed to be £5,000 per sq.m at 2013
2011 Prices

Capacity for Future Comparison Goods Floorspace

- 7.52 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2013. We assume that there is therefore a nil quantitative need for any additional floorspace across the District at 2013. Once again, it has generally been assumed that the future performance of each zone will be commensurate with its current market share.
- 7.53 Existing facilities within Kirklees attract £905.96m of comparison goods expenditure from inside the Study Area at 2013. This equates to a market share of 61.1% of all comparison goods expenditure generated by residents of the Study Area. Having reviewed retail studies undertaken in the neighbouring local authority areas of Bradford, Calderdale and Wakefield, we estimate that the



comparison goods floorspace in Kirklees turns over around £1,031.17m at 2013 once account has been for the inflow of expenditure from outside the Study Area. By 'rolling forward' this market share and making provision for inflow from neighbouring authority areas, we estimate that facilities in Kirklees will attract £1,173.15m of comparison goods expenditure at 2018, increasing to £1,355.60 at 2023 and to £1,625.91m at 2028 based on a continuation of Kirklees' current Study Area market share.

Table 7.20: Quantitative Need for Comparison Goods Floorspace in Kirklees District

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	1,031.17	1,031.17	0.00
2018	1,142.96	1,173.15	30.19
2023	1,264.40	1,355.60	91.20
2028	1,395.99	1,625.91	229.92

Source: Table 30A of Appendix 7

¹ Turnover of existing stores to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (61.1%) claimed by facilities within the Study Area 2011 Prices

- 7.54 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2018 there will be a relatively limited expenditure surplus of £30.19m to support additional comparison goods floorspace within the Study Area. This surplus is forecast to increase to £91.20m at 2023 and then sharply to £229.92m at 2028. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time) in accordance with the projections set out in Table 4b of Experian Retail Planner Briefing Note 11 (these being +1.9% at 2014, +2.2% at 2015, +2.1% per annum between 2016 and 2020, and +2.0% between 2021 and 2028).
- 7.55 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 7.17 and which we estimate will have a combined benchmark turnover of £95.96m at 2011 prices if it were to be assumed that each was operational at 2013. Significant floorspace is proposed in the form of the additional comparison goods sales area associated with the proposed Tesco superstore at Southgate, Huddersfield (which we estimated would have a turnover, over and above Tesco's existing store at Viaduct Street which would cease to trade, of £19.23m) and the proposed extension to the Kingsgate Shopping Centre (which we estimate would have an expected turnover of £66.92m).



7.56 The estimated £95.96m turnover of comparison goods commitments is substantial and extinguishes any quantitative need for additional floorspace across the District over the medium term. Accordingly, Table 7.22 indicates a negative residual in the three reporting periods to 2023. A positive residual of £102.28m is identified at 2028 which would support between 15,100 sq.m and 25,200 sq.m of additional net sales floorspace. The minimum figure is based on the identified need being met through the delivery of high street floorspace and the maximum figure relates to need being met by bulky goods retailers or in smaller town centres (which both generally accommodate operators which achieve lesser sales densities).

Table 7.21: Extant Comparison Commitments within the Study Area

Zone	Location	Planning Application Reference	Proposal	Net Comp Sales (sq.m) ¹	Comp Sales Density (£ per sq.m) ²	Estimate Turnover at 2013 (£m)	Status
1.	Huddersfield In and Edge	2009/93675	Erection of replacement retail store (Class A1) with petrol filling station, car parking, landscaping and associated works at Southgate, Huddersfield	1,613	11,924	19.23	Extant permission
1.	Huddersfield In and Edge	2011/91613	Extension of planning permission reference 2007/92060 to provide for the erection of a 11,500 sq.m net extension to the existing shopping centre at Kirkgate/Oldgate	11,154	6,000	66.92	Extant permission
4.	Cleckheaton In and Edge	2009/92638	Comparison goods floorspace associated with proposed discount foodstore	250	5,276	1.32	Extant permission
7.	Holmfirth In and Edge	2011/92600	Demolition of existing building and erection of foodstore (Lidl) with associated car park, landscaping, highway works at Riverholme Works, Holmfirth	213	3,034	0.65	Under construction
7.	'Other Zone 7'	2012/91214	Erection of extension to store, car parking and access work at Morrisons, Station Street, Meltham	279	15,325	4.28	Extant
8.	Dewsbury In and Edge	2012/90049	Extension of planning permission reference 2007/93354 to provide for the erection of 1,194 sq.m gross mezzanine in the existing Asda store at Mill Street West, Dewsbury	597	4,635	2.77	Extant
8.	'Other Zone 8'	2010/91399	Erection of comparison goods retail units at Slaitwaite Road, Thornhill Lees, Dewsbury	198	4,000	0.79	Extant
Total				14,304		95.96	

Source: Table 31 of Appendix 7
2011 Prices



Table 7.22: Quantitative Need for Comparison Goods Floorspace in Kirklees District with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	95.96	-95.96	-19,200	-32,000
2018	30.19	106.47	-76.28	-13,800	-22,900
2023	91.20	116.74	-25.54	-4,200	-6,900
2028	229.92	127.63	102.28	15,100	25,200

Source: Table 32A of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013

2011 Prices

7.57 Once again, having identified future comparison goods needs on a District-wide basis, we now give consideration to the quantum of the above floorspace which could be supported in each zone (assuming that the current market share of each is maintained going forward).

Zone 1

7.58 Comparison goods retail provision within Zone 1, which includes Huddersfield town centre, claims 31.9% of overall comparison goods expenditure which originates within the Study Area. After account is taken for inflow to destinations inside Zone 1 from outside the Study Area, Table 7.23 identifies that this equates to £529.12m at 2013, increasing to £601.98m at 2018, to £695.60 at 2023 and to £834.30m at 2028. Assuming that Huddersfield's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, we estimate that such increases in expenditure will result in an expenditure surplus of £15.49m at 2018, increasing to £46.80m at 2023, and to £117.98m at 2028.

Table 7.23: Quantitative Need for Comparison Goods Floorspace in Zone 1

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	529.12	529.12	0.00
2018	586.49	601.98	15.49
2023	648.80	695.60	46.80
2028	716.33	834.30	117.98

Source: Table 30B of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (32.0%) claimed by facilities within Zone 1

2011 Prices



7.59 Both the proposed extension to Kingsgate Shopping Centre and the additional comparison goods floorspace associated with the proposed Southgate Tesco store will claim a significant quantum of future comparison goods expenditure. Indeed, as Table 7.24 below demonstrates, these two commitments are such that they extinguish any real need for additional comparison goods floorspace in Huddersfield over the whole plan period to 2028 based on the retention of the town's current market share.

7.60 However, although there are a number of significant comparison goods retail destinations in proximity to Kirklees (particularly to the north), we consider that a large-scale, attractive, modern comparison goods development – such as that proposed at Kingsgate – could act to provide a 'step change' in the proportion of clothing and footwear expenditure claimed by Huddersfield. Accordingly, we would suggest that there will be a need to undertake additional empirical research (in the shape of a new household survey) subsequent to the implementation of any substantial retail development scheme in Huddersfield. Any resultant increase in the retention of comparison goods expenditure which results would help support additional comparison goods floorspace going forward.

Table 7.24: Quantitative Need for Comparison Goods Floorspace in Zone 1 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	86.16	-86.16	-17,200	-28,700
2018	15.49	95.50	-80.01	-14,400	-24,100
2023	46.80	105.64	-58.84	-9,600	-16,000
2028	117.98	116.64	1.34	200	300

Source: Table 32B of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Zone 2

7.61 Zone 2 does not contain a principal centre and therefore attracts only a small proportion (1.6%) of comparison goods expenditure which originates within the Study Area. After account is taken for inflow from outside the Study Area, Table 7.23 identifies that the expenditure directed to Zone 2 destinations equates to £26.21m at 2013, increasing to £29.82m at 2018, to £34.46m at 2023 and to £41.33m at 2028. Assuming that Zone 2's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of



their floorspace, we estimate that such increases in expenditure will result in a very modest expenditure surplus of £0.77m at 2018, increasing to £2.32m at 2023, and to £5.84m at 2028.

Table 7.25: Quantitative Need for Comparison Goods Floorspace in Zone 2

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	26.21	26.21	0.00
2018	29.05	29.82	0.77
2023	32.14	34.46	2.32
2028	35.49	41.33	5.84

Source: Table 30C of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (1.6%) claimed by facilities within Zone 2
2011 Prices

7.62 We are unaware of any comparison goods retail commitments within Zone 2 and the identified expenditure surplus therefore directly translates into a limited floorspace requirement. Table 7.26 below sets out our estimation of the additional comparison goods floorspace which could be supported in Zone 2, which equates to between 100 sq.m and 200 sq.m at 2018, increasing to between 900 sq.m and 1,400 sq.m at 2028.

Table 7.26: Quantitative Need for Comparison Goods Floorspace in Zone 2 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	0.00	0.00	0	0
2018	0.77	0.00	0.77	100	200
2023	2.32	0.00	2.32	400	600
2028	5.84	0.00	5.84	900	1,400

Source: Table 32C of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Zone 4

7.63 Whilst Zone 4 contains the centres of Cleckheaton, Heckmondwike and Mirfield, these predominantly meet local service and convenience needs, and only relatively limited comparison goods expenditure (equating to a 1.8% market share of Study Area comparison goods expenditure) is attracted to facilities within the zone.



7.64 After account is taken for inflow from outside the Study Area, Table 7.27 identifies that the expenditure directed to facilities in Zone 4 equates to £29.21m at 2013, increasing to £33.23m at 2018, to £38.40m at 2023 and to £46.06m at 2028. Assuming that Zone 4's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, we estimate that such increases in expenditure result once more in a modest expenditure surplus to support additional comparison goods floorspace of £0.86m at 2018, increasing to £2.58m at 2023, and to £6.51m at 2028.

Table 7.27: Quantitative Need for Comparison Goods Floorspace in Zone 4

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	29.21	29.21	0.00
2018	32.38	33.23	0.86
2023	35.82	38.40	2.58
2028	39.55	46.06	6.51

Source: Table 30D of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (1.8%) claimed by facilities within Zone 4
2011 Prices

7.65 We are aware that the extant planning permission for a discount foodstore at Horncastle Street in Cleckheaton will result in a small quantum of comparison goods floorspace being brought forward and, in considering future comparison goods floorspace requirements in Zone 4, allowance is made for this existing commitment (which we estimate will turn over in the order of £1.32m of comparison goods expenditure at 2013). Table 7.28 below sets out our estimation of the additional comparison goods floorspace which could be supported in Zone 4, which translates into a positive floorspace requirement after 2023 only. At 2023, we estimate that there will be a modest requirement for between 200 sq.m and 300 sq.m of additional comparison goods floorspace, increasing to a requirement for between 700 sq.m and 1,200 sq.m at 2028.



Table 7.28: Quantitative Need for Comparison Goods Floorspace in Zone 4 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	1.32	-1.32	-300	-400
2018	0.86	1.46	-0.61	-100	-200
2023	2.58	1.62	0.97	200	300
2028	6.51	1.79	4.73	700	1,200

Source: Table 32D of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013

2011 Prices

Zone 5

7.66 Zone 5 does not contain a principal centre and therefore, not unexpectedly, attracts only a very small proportion of comparison goods expenditure which originates within the Study Area. Our assessment indicates that facilities in Zone 5 claim 0.9% of Study Area comparison goods expenditure at 2013.

7.67 After account is taken for inflow from outside the Study Area, Table 7.29 identifies that Zone 5 comparison goods retail facilities claim £12.96m at 2013, increasing to £14.74m at 2018, to £17.04m at 2023 and to £20.43m at 2028. Assuming that Zone 5's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, we estimate that such increases in expenditure will result once more in a very modest expenditure surplus of £0.38m at 2018, increasing to £1.15m at 2023, and to £2.89m at 2028.

Table 7.29: Quantitative Need for Comparison Goods Floorspace in Zone 5

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	12.96	12.96	0.00
2018	14.36	14.74	0.38
2023	15.89	17.04	1.15
2028	17.54	20.43	2.89

Source: Table 30E of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (0.9%) claimed by facilities within Zone 5

2011 Prices

7.68 We are unaware of any comparison goods retail commitments within Zone 5 and the identified expenditure surplus therefore directly translates into a very limited floorspace requirement. Table



7.30 below sets out our estimation of the additional comparison goods floorspace which could be supported in Zone 5, which equates to 100 sq.m at 2018, increasing to between 400 sq.m and 700 sq.m at 2028.

Table 7.30: Quantitative Need for Comparison Goods Floorspace in Zone 5 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	0.00	0.00	0	0
2018	0.38	0.00	0.38	100	100
2023	1.15	0.00	1.15	200	300
2028	2.89	0.00	2.89	400	700

Source: Table 32E of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Zone 6

7.69 The principal centres located within Zone 6 – Denby Dale, Kirkburton and Skelmanthorpe – also have a relatively limited comparison goods offer and the Zone as a whole attracts a 0.7% market share of comparison goods expenditure originating from within the Study Area. After account is taken for inflow from outside the Study Area, the identified expenditure directed to Zone 6 destinations equates to £9.75m at 2013, increasing to £11.10m at 2018, to £12.82m at 2023 and to £15.38m at 2028. After assuming once more that Zone 6’s comparison goods facilities trade ‘at equilibrium’ at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, such increases result in an extremely limited expenditure surplus of £0.29m at 2018, increasing to £0.86m at 2023, and to £2.17m at 2028.

Table 7.31: Quantitative Need for Comparison Goods Floorspace in Zone 6

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	9.75	9.75	0.00
2018	10.81	11.10	0.29
2023	11.96	12.82	0.86
2028	13.20	15.38	2.17

Source: Table 30F of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (0.7%) claimed by facilities within Zone 6
2011 Prices



7.70 As there are no significant comparison goods retail commitments within Zone 6, the very modest expenditure surplus identified translates into a very modest floorspace requirement. Table 7.24 provides our estimation of the additional comparison goods floorspace which could be supported in Zone 6, this being between up to 100 sq.m at 2018, increasing to between 300 sq.m and 500 sq.m at 2028.

Table 7.32: Quantitative Need for Comparison Goods Floorspace in Zone 6 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	0.00	0.00	0	0
2018	0.29	0.00	0.29	100	100
2023	0.86	0.00	0.86	100	200
2028	2.17	0.00	2.17	300	500

Source: Table 32F of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Zone 7

7.71 Zone 7 accommodates the centres of Holmfirth and Honley, which also have a relatively modest comparison goods retail offer. Accordingly, Zone 7 also claims a limited market share (1.0%) of comparison goods expenditure which originates within the Study Area. Table 7.33 identifies that the comparison goods expenditure directed to Zone 7 destinations is estimated to be £15.19m at 2013, increasing to £17.28m at 2018, to £19.97m at 2023 and to £23.95m at 2028. We have once again assumed that Zone 7's comparison goods facilities trade 'at equilibrium' at 2013 and have taken account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, and estimate that the identified increases in expenditure will result in a limited expenditure surplus of £0.44m at 2018, which increases to £1.34m at 2023, and to £3.39m at 2028.



Table 7.33: Quantitative Need for Comparison Goods Floorspace in Zone 7

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	15.19	15.19	0.00
2018	16.84	17.28	0.44
2023	18.62	19.97	1.34
2028	20.56	23.95	3.39

Source: Table 30G of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (1.0%) claimed by facilities within Zone 7
2011 Prices

7.72 We are aware of two extant planning permissions for foodstore development in Zone 7, both of which would result in additional comparison goods floorspace. We estimate that the comparison goods element of the proposed Lidl foodstore at the Riverholme Works site at Huddersfield Road in Holmfirth would turn over in the order of £0.65m at 2013 and that the extension to the existing Morrisons store would turn over around £4.28m of comparison goods expenditure at 2013. Given the limited comparison goods expenditure surplus identified above (based again on a continuation of Zone 7's existing market share), the identified commitments extinguish any need for additional comparison goods floorspace within the zone.

Table 7.34: Quantitative Need for Comparison Goods Floorspace in Zone 7 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	4.92	-4.92	-1,000	-1,600
2018	0.44	5.46	-5.01	-900	-1,500
2023	1.34	6.04	-4.69	-800	-1,300
2028	3.39	6.66	-3.28	-500	-800

Source: Table 32G of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Zone 8

7.73 Dewsbury, which accommodates a number of high street multiple retailers, is located in Zone 8 and therefore the zone attracts one of the stronger market shares in the Study Area. However, given the relative dominance of Huddersfield and the proximity of higher order centres outside the Study Area, the comparison goods market share of Zone 8 is still limited to 6.6% of such expenditure generated within the Study Area. After account is taken for the inflow of expenditure from outside the Study



Area, we estimate that £109.25m is claimed by Zone 8 comparison goods facilities at 2013, increasing to £124.29m at 2018, to £143.62m at 2023 and to £172.26m at 2028. Assuming again that Zone 8's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, we estimate that such increases in expenditure will result in an expenditure surplus of £3.20m at 2018, increasing to £9.66m at 2023, and to £24.36m at 2028.

Table 7.35: Quantitative Need for Comparison Goods Floorspace in Zone 8

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	109.25	109.25	0.00
2018	121.10	124.29	3.20
2023	133.96	143.62	9.66
2028	147.90	172.26	24.36

Source: Table 30H of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (6.6%) claimed by facilities within Zone 8 2011 Prices

7.74 There are two extant planning commitments of relevance to the assessment of comparison goods quantitative need in Zone 8 at the time of reporting, these being the comparison goods floorspace associated with the proposed extension of the Asda store at Mill Street West and the planning permission to provide small-scale retail units at Slaithwaite Road in Dewsbury. We estimate that these commitments would have a comparison goods turnover of around £3.56m if trading at 2013. Accordingly, these commitments accommodate any quantitative need identified in Zone 8 over the short to medium term. Table 7.36 below indicates a requirement for a further 900 sq.m to 1,400 sq.m of comparison goods floorspace at 2023, increasing to between 2,900 sq.m and 4,800 sq.m at 2028.



Table 7.36: Quantitative Need for Comparison Goods Floorspace in Zone 8 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	3.56	-3.56	-700	-1,200
2018	3.20	3.95	-0.75	-100	-200
2023	9.66	4.37	5.30	900	1,400
2028	24.36	4.82	19.54	2,900	4,800

Source: Table 32H of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013

2011 Prices

Zone 9

7.75 Zone 9 contains the centres of Batley and Birstall, along with Birstall Shopping Park which is located at Junction 27 of the M62 motorway. As such, the zone (and Birstall Shopping Park in particular) attracts a significant quantum of comparison goods expenditure, which equates to a 16.5% market share of comparison goods Study Area expenditure. After account is taken for inflow from outside the Study Area, Table 7.37 identifies that the expenditure directed to Zone 9 destinations equates to £297.04m at 2013, increasing to £337.94m at 2018, to £390.50m at 2023 and to £468.36m at 2028. Assuming that Zone 9's comparison goods facilities trade 'at equilibrium' at 2013 and taking account of the propensity for existing retailers to be able to improve the sales efficiency of their floorspace, we estimate that such increases in expenditure will result in a significant expenditure surplus of £8.70m at 2018, increasing to £26.27m at 2023, and to £66.23m at 2028.

Table 7.37: Quantitative Need for Comparison Goods Floorspace in Zone 9

Year	Benchmark Turnover (£m) ¹	Available Expenditure (£m) ²	Surplus Expenditure (£m)
2013	297.04	297.04	0.00
2018	329.24	337.94	8.70
2023	364.22	390.50	26.27
2028	402.13	468.36	66.23

Source: Table 30I of Appendix 7

¹ Turnover to increase in line with improvements in turnover efficiency set out in Table 4b of Experian Retail Planner 11 (September 2013)

² Assumes constant market share (16.5%) claimed by facilities within Zone 9

2011 Prices

7.76 We are unaware of any relevant comparison goods retail commitments within Zone 9 and the identified expenditure therefore directly translates into a floorspace requirement. Table 7.38 below sets out our estimation of the additional comparison goods floorspace which could be supported in



Zone 9, which equates to between 1,600 sq.m and 2,600 sq.m at 2018, increasing to between 4,300 sq.m and 7,100 sq.m at 2023, and to between 9,800 sq.m and 16,300 sq.m at 2028.

Table 7.38: Quantitative Need for Comparison Goods Floorspace in Zone 9 with Account Made for Commitments

Year	Comparison Goods				
	£m			Floorspace Requirement (sq.m net)	
	Surplus	Extant	Residual	Min ^{1*}	Max ^{2*}
2013	0.00	0.00	0.00	0	0
2018	8.70	0.00	8.70	1,600	2,600
2023	26.27	0.00	26.27	4,300	7,100
2028	66.23	0.00	66.23	9,800	16,300

Source: Table 32I of Appendix 7

¹ Average sales density assumed to be £5,000 per sq.m at 2013

² Average sales density assumed to be £3,000 per sq.m at 2013
2011 Prices

Qualitative Assessment

7.77 As previously highlighted, the above assessment assumes that the existing market share of Study Area expenditure claimed by facilities in a particular zone will continue going forward. Clearly, in reality, as additional development is implemented, market shares will change. There may also be qualitative benefits associated with improving provision in a particular zone in order that it can claim a greater share of expenditure going forward. The qualitative need for additional provision is of particular pertinence to convenience goods retailing and we set out below a summary of the convenience goods expenditure within each zone which is retained each zone, both in monetary terms and as a proportion of expenditure.

Table 7.39: Retention of Convenience Goods Expenditure within Each Zone

Zone	Convenience Goods Expenditure at 2013 (£m)	Retained Convenience Goods Expenditure within Zone at 2013 (£m)	Convenience Goods Leakage at 2013 (£m)	Proportion Retained at 2013 (%)
1	84.68	45.74	39.22	53.7
2	98.68	63.25	35.43	64.1
4	120.60	73.87	46.72	61.3
5	92.42	24.94	67.48	27.0
6	77.17	8.10	77.17	10.5
7	63.78	29.21	34.57	45.8
8	89.67	59.38	30.29	66.2
9	62.99	34.78	28.21	55.2

Source: Table 4 of Appendix 7



- 7.78 Whilst Table 39 should be viewed in the wider context of the geography of the Study Area, it is evident that some zones secure a very limited retention of convenience goods expenditure which originates within the zone. This is particularly the case of Zone 5 (which accommodates Marsden and Slaithwaite), Zone 6 (which accommodates Kirkburton and Skelmanthorpe) and, to a lesser degree, Zone 7 (which accommodates Holmfirth).
- 7.79 Zone 5 currently has very limited main food shopping provision (the principal stores being the Aldi at Scar Lane in Milnsbridge and the Sainsbury's at Moorhill Road in Salendine Nook), which results in the majority of such shopping trips being undertaken at food superstores in and around Huddersfield, including the Asda at Longhill Road, the Sainsbury's at Southgate and the Tesco at Viaduct Street. These stores are reasonably distant from parts of Zone 5, but it is evident that the lack of choice forces customers to travel further afield to undertake main food shopping.
- 7.80 Zone 6 also fails to provide a supermarket of sufficient scale to attract significant main food shopping expenditure and, as such, residents travel to the Morrisons at Penistone Road in Waterloo and to, a lesser degree, to the Asda at Asdale Road in Wakefield to meet such needs. Zone 6 is a very substantial zone, and whilst largely rural in character, it is evident that existing provision falls below the level which may reasonably be expected in order to ensure sustainable patterns of travel. Accordingly, there would be clear qualitative benefits arising from the provision of appropriately scaled additional food retail provision within Denby Dale, Kirkburton or Skelmanthorpe.
- 7.81 Whilst the most popular main food shopping destination for residents of Zone 7 is the Morrisons at Station Road in Meltham, it is evident that many of those who do not wish to use this store are travelling further afield to shop in food superstores. In particular, substantial trade leaks from the Holme Valley to the Sainsbury's at Southgate and to the Morrisons at Waterloo. Each of these stores is located a reasonable distance from Zone 7 and, even though there is an extant planning permission for a Lidl in Holmfirth, there may still be qualitative benefits which would arise through the provision of further appropriate main food shopping provision within the Holme Valley.
- 7.82 The issues apparent in Zones 5 and 6 are such that any future planning applications seeking to provide additional convenience goods floorspace in locations accessible to these zones should also be viewed in the context of the qualitative benefits which could arise from the implementation of the proposals. Accordingly, whilst the quantitative assessment undertaken earlier in this section should be seen as the starting point for the assessment of the need for future convenience goods floorspace, the deficiencies in provision highlighted above are a further important consideration.



7.83 Due to the nature of comparison goods retailing (where many purchases are occasional in nature and would ordinarily result in trips to higher order centres to take advantage of the greater choice available), we do not consider that there are any such deficiencies which need to be addressed in the same manner. Table 7.40 indicates that there are three zones which attract more than four out of every ten pounds spend in tangible stores, these being Zone 1 (accommodating Huddersfield), Zone 8 (accommodating Dewsbury) and Zone 9 (accommodating Batley, Birstall and Birstall Shopping Park). The patterns of expenditure noted below are broadly in line with our expectations and whilst shoppers in certain zones may have to travel some distance to Huddersfield, Leeds or Wakefield to make certain purchases, this is a consequence of the geography of the District (with certain zones failing to be densely populated enough to support substantial comparison goods retail provision).

Table 7.40: Retention of Comparison Goods Expenditure within Each Zone

Zone	Comparison Goods Expenditure at 2013 (£m)	Retained Comparison Goods Expenditure at 2013 (£m)	Comparison Goods Leakage at 2013 (£m)	Proportion Retained at 2013 (%)
1	117.36	87.85	29.52	74.9
2	138.38	6.44	131.94	4.7
4	180.48	19.14	161.33	10.6
5	141.56	10.01	131.55	7.1
6	123.94	4.44	119.51	3.6
7	103.33	9.81	93.52	9.5
8	121.89	54.74	67.15	44.9
9	86.63	42.64	43.99	49.2

Source: Table 29 of Appendix 7



8.0 Summary

Purpose

- 8.01 The key purpose of the Retail Study is to provide an assessment of retail needs and capacity across Kirklees in the period to 2028 and to provide a review of the performance of the District's six town centres. The Study will act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail development.
- 8.02 The Study is based on an up-to-date understanding of shopping patterns across the defined Study Area and, in March 2013, a survey of 1,000 households was undertaken across ten separate survey zones, which are broadly reflective of the Kirklees authority boundary but also include areas beyond which look to the District to meet shopping needs. The zones have been defined in a manner which allows for the consideration of shopping patterns related to each of the District's six town centres. Zone 1 is focused around Huddersfield town centre, Zone 4 contains Cleckheaton and Heckmondwike, Zone 7 contains Holmfirth, Zone 8 contains Dewsbury, and Zone 9 contains Batley. The zones were defined according to postcode sector geography to assist in the collection of data for the purposes of a telephone based household survey, rather than necessarily representing the shopping catchment areas of the respective town centres.

Health Check Assessments and the Setting of Local Impact Thresholds

- 8.03 The NPPF sets out a requirement for local planning authorities to pursue policies that support the vitality and viability of town centres and, accordingly, it is appropriate to consider the current performance of identified centres in order to understand their resilience to future development proposals.
- 8.04 Our health check assessment work indicates that, whilst there has been a decline in the comparison goods retail units in Huddersfield town centre in recent years (from 262 units in 2008 to 237 in 2013), the centre continues to perform an important sub-regional role and exhibits a number of generally positive signs in relation to defined health check indicators. Whilst we do note that the proportion of vacant units in Huddersfield is slightly above national average, the proportion of floorspace which is vacant is below national average. This would suggest that there is a strong demand for larger floorplate units.



- 8.05 Huddersfield has a good balance of national multiple retailers and independents, and accommodates 25 of the 27 top comparison goods retailers identified by Experian Goad (Debenhams and John Lewis being the two who are not represented in the centre). Whilst comparison goods operators can be found throughout the town centre, the majority of national multiple retailers are located within the indoor shopping centres and along King Street. The town centre also has a relatively strong convenience goods retailing offer, which includes the Sainsbury's stores at Wakefield Road and Market Street, the Tesco at Viaduct Street and the Lidl at Manchester Road. As such, shoppers are able to undertake a main food shop when visiting the centre, thus increasing the chance of undertaking 'linked trips' as part of the same journey.
- 8.06 In recent years there have been a number of development proposals to provide significant additional retail accommodation in Huddersfield. Such proposals include the grant of planning permission for a two-storey extension to the existing Kingsgate Shopping Centre and the application to redevelop the Queensgate site to provide a new library, art gallery and information centre, together with additional retail floorspace, a new market hall, bars, restaurants and up to 900 car parking spaces. This application remains undetermined at the time of reporting.
- 8.07 Our analysis indicates that the other town centres are for the most part trading well, with Cleckheaton and Holmfirth benefitting from vacancy rates which are well below national average. However, Dewsbury has a very large number of vacancies which together account for a considerable amount of floorspace (circa 10,000 sq.m). Whilst we note that a number of units in Dewsbury town centre are currently being refurbished, the vacancy rate is such that it suggests that the historic level of retail provision in the town is substantially greater than the current retailer demand for premises. Dewsbury has also been hit by the withdrawal of several key national multiple retailers from the town, which is also likely to have impacted on the attractiveness of the town to shoppers.
- 8.08 Having considered the current performance of the above centres, it is appropriate to identify thresholds for the scale of edge-of-centre and out-of-centre retail and leisure development which should be subject of an impact assessment in accordance with the criteria set out by paragraph 26 of the NPPF. We do not consider that a blanket threshold is suitable for all types of centre across an administrative area. In this regard, we advocate a tiered approach whereby the threshold applied to retail, leisure and office planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of the particular centre within its sphere of influence.
- 8.09 For the Sub-Regional Centre of Huddersfield and the two Large Town Centres of Batley and Dewsbury, it is recommended that development proposals providing greater than 500 sq.m gross floorspace for



retail, leisure or office uses in an edge or out-of-centre location should be the subject of an impact assessment. It is considered appropriate to reduce the threshold around Small Town Centres and District Centres to 300 sq.m gross and around Local and Neighbourhood Centres to 200 sq.m gross. In our experience, it will only generally be development of a scale greater than these thresholds which might lead to a 'significant adverse' impact and which could merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF.

Shopping Patterns

- 8.10 The results of the household survey have allowed us to establish current shopping patterns across the whole of the Study Area. The survey recorded the market share of main and top-up convenience shopping expenditure secured by retailers within Kirklees District. It also did the same for a full range of comparison goods, including clothing, health and beauty, recreational goods, DIY and so on.
- 8.11 The survey indicates that Kirklees District retains a high market share of both main (66.6%) and top-up convenience goods shopping (70.2%). Importantly, as would be expected, the convenience goods market share of facilities in Kirklees is generally greatest in the 'core' zones clustered around Huddersfield (comprising Zones 1, 2, 5 and 7). Each of these zones provides good accessibility to a range of main food shopping facilities and, as a consequence, on each occasion at least 85% of main food shopping trips which originate within each of these particular zones are undertaken at destinations within Kirklees.
- 8.12 The zones for which Kirklees has a significantly lower convenience goods market share are those at the periphery of the Study Area. This is unsurprising given the easy access to facilities in Calderdale, Leeds and Wakefield secured from such locations. Accordingly, in general, the retention of both main and top up convenience goods expenditure is considered to be good, with a high proportion of main convenience goods shopping trips undertaken by the District's population being retained within the District.
- 8.13 In considering shopping patterns, it is relevant to note the proportion of the Study Area population which resides within Kirklees, as assuming a relatively even and sustainable distribution of facilities across the Study Area and beyond, it might be expected that the market share claimed by Kirklees will be broadly commensurate with its population. In this regard, we note that the ONS estimated population of Kirklees at 2013 is 428,487. Given the estimated Study Area population of 615,401 at 2013, we estimate that 69.6% of the Study Area population reside in Kirklees. Accordingly, one might expect for Kirklees to claim around 70% of shopping trips in any one goods category.



- 8.14 Accepting this 'benchmark' as a starting point, we note that Kirklees' market share was more than 70% for electrical goods (73.4%) and for furniture goods (75.1%). Whilst a number of goods categories recorded a slightly less than 70% market share – including chemist goods (68.1%), small household goods (67.7%), DIY goods (64.5%), recreation goods (64.2%), garden goods (63.3%), Books, CDs and DVDs (60.6%) – it is accepted that there are a number of competing centres to the north of the Study Area and that one of these (Leeds city centre) has a regional role for comparison goods shopping. Accordingly, it is inevitable that significant trade is lost both to Leeds city centre and also to the White Rose Shopping Centre. Given the proximity of these two large facilities, the comparison goods market shares achieved are generally considered to be reasonable and broadly in line with expectations.
- 8.15 However, the market share of trips claimed by destinations in Kirklees of trips to undertake clothes and footwear shopping is significantly less than for all other categories, with just 45.7% of such journeys directed towards facilities in the District. Moreover, Huddersfield claims an overall market share of just 28.3% of such trips. Whilst we again note the influence of competing high-order facilities in very close proximity to certain parts of the Study Area, we consider the recorded market share for clothes shopping to be less than could be expected.

Population and Expenditure

- 8.16 In order to accurately estimate the future expenditure which may be available to support retail provision in the District, it is necessary to source up to date population and expenditure data.
- 8.17 The population and estimated per capita convenience and comparison expenditure within each postal code sector in the Study Area has been calculated using Experian Micromarketer G3 data. The base population takes into consideration the findings of the 2011 Census which has then been projected forward by Experian to 2028 (utilising growth rates which take account of ONS population projections and current age and gender estimates). Future growth in expenditure has been calculated using the growth rates and allowances for special forms of trading (principally expenditure committed through internet shopping) set out in Experian Retail Planner Briefing Note 11 (published October 2013).
- 8.18 On this basis, the defined Study Area is estimated to contain a resident population of approximately 615,401 people at 2013 rising to 674,595 people at 2028. This represents an increase in population within the Study Area of 59,194 people (equating to an increase of 9.6%) between 2013 and 2028. In the zones which most closely correspond to the Kirklees administrative area (these being Zones 1, 2, 4, 5, 6, 7, 8 and 9), we note that the population increases from 428,102 in 2013 to 468,676 in



2028, an increase of 40,574. We consider this projected increase to be generally consistent with the level of housing proposed by the now withdrawn Submission draft of the Kirklees Core Strategy, which identified a requirement for 22,470 dwellings between 2010 and 2028, which equates to an average annual requirement for 1,250 dwelling completions. As we identified at paragraph 6.06, there would need to be a quite significant increase in population (above and beyond that which is currently anticipated) in order to generate a substantially greater level of quantitative need. Some degree of variation from the above population figures is to be expected moving forward and will not necessarily act to undermine the broad findings of the Study.

- 8.19 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2013, the resident population of the Study Area generates some £1,006.88m of convenience goods expenditure. This is forecast to increase to £1,179.62 at 2028, which represents an increase of £178.78m (or 17.9%) between 2013 and 2028. In respect of comparison goods expenditure, at 2013 it is estimated that the resident population of the Study Area generates £1,481.99m of comparison goods expenditure, which is forecast to increase to £2,336.77m at 2028. This represents an increase of £854.77m (or 57.7%) between 2013 and 2028.

Quantitative Need

- 8.20 The Study identifies the quantitative need for additional convenience and comparison goods floorspace in the Study Area up to 2028, taking into account the future expenditure available, extant planning permissions and the trading performance of existing stores. The Study also looks specifically at the estimated capacity for additional floorspace within particular Study Area zones.
- 8.21 In terms of convenience goods, our quantitative modelling exercise indicates that, after account is made for existing commitments, a District-wide expenditure residual of £97.90m is identified at 2013. We estimate that such a residual would support between 8,200 sq.m and 19,600 sq.m of additional convenience goods net sales floorspace, dependent on end operator and the market they serve. The minimum figure is based on the identified need being met by one of the leading five foodstore operators (Asda, Morrisons, Sainsbury's Tesco and Waitrose) and is derived from the application of an average of their company average sales densities. The higher figure is based upon the need being met by a discount or local independent retailer, which could have a sales turnover in the order of £5,000 per sq.m.
- 8.22 Assuming that Kirklees' existing market share is 'rolled forward' in the period to 2028 (and allowing for improvements in the sales efficiency of both existing and committed floorspace), we estimate that the



identified expenditure residual will increase to £133.90m at 2018, to £179.03m at 2023, and to £221.77m at 2028. This will result in a significant increased need throughout the District over the medium to long term, equating to a net convenience goods floorspace requirement of between 11,200 sq.m and 26,600 sq.m at 2018, increasing to between 14,900 sq.m and 35,300 sq.m at 2023, and to between 18,200 and 43,300 sq.m at 2028.

8.23 Turning to comparison goods, we consider that facilities are trading 'in equilibrium' at 2013 (i.e. the survey-derived turnover of each destination represents its expected performance and therefore there is no expenditure surplus at base year 2013). By 2018, we identify a District-wide expenditure surplus of £30.19m to support additional comparison goods floorspace within the Study Area. This surplus is forecast to increase to £91.20m at 2023 and then sharply to £229.92m at 2028. However, it is evident that existing commitments would have a very significant claim on future expenditure growth should they be implemented. Indeed, the estimated £95.96m turnover of comparison goods commitments is so substantial that it extinguishes any quantitative need for additional floorspace across the District over the medium term. A positive residual of £102.28m is therefore only identified at 2028 which would support between 15,100 sq.m and 25,200 sq.m of additional net sales floorspace.

Qualitative Need

8.24 Our assessment assumes that the existing market share of Study Area expenditure claimed by facilities in a particular zone will continue going forward. In reality, as additional development is implemented, market shares change. There may also be qualitative benefits associated with improving provision in a particular zone in order that it can claim a greater share of expenditure going forward. The qualitative need for additional provision is of particular pertinence to convenience goods retailing and it is evident that, at present, certain zones within the Study Area secure a very limited retention of convenience goods expenditure which originates within the zone. This is particularly the case in Zone 5 (which accommodates Marsden and Slaithwaite), Zone 6 (which accommodates Kirkburton and Skelmanthorpe) and, to a lesser degree, Zone 7 (which accommodates Holmfirth).

8.25 In particular, the relative lack of choice in terms of food shopping facilities in Zones 5 and 6 is such that any future planning applications seeking to provide additional convenience goods floorspace in locations accessible to these zones should also be viewed in the context of the qualitative benefits which could arise from the the proposals. Accordingly, whilst the quantitative assessment undertaken earlier in this section is the starting point for the assessment of the need for future convenience goods floorspace, the deficiencies in provision in Zones 5, 6 and 7 are a further important consideration.



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. A more detailed breakdown of comparison goods categories is provided below.
<i>Furniture Goods</i>	<i>Includes all consumer expenditure on furniture, floor coverings and household textiles such as beds, sofas, tables, cupboards, bed linen, curtains, towels, lamps, mirrors, and so on.</i>
<i>DIY Goods</i>	<i>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, and so on.</i>
<i>Electrical Goods</i>	<i>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, and so on.</i>
<i>Clothing & Footwear</i>	<i>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, and so on.</i>
<i>Household Goods</i>	<i>Includes household textiles and soft furnishings, china, glassware, jewellery and other miscellaneous goods such as greeting cards, notebooks, pens, pencils, and so on.</i>
<i>Recreational Goods</i>	<i>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, and so on.</i>



<i>Chemist Goods</i>	<i>All consumer retail expenditure on prescription and non-prescription drugs, adhesive and non-adhesive bandages, first-aid kits, hot-water bottles, toilet shops, sponges, and so on.</i>
Convenience Goods	Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines (Annex A, PPS4 Practice Guidance).
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.
Expenditure Per Capita	The average spend of each person within the defined Study Area on a variety of retail goods.
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 Forecasts	This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 11 (October 2013).
Experian (MMG3)	The database used to identify population, expenditure and socio-economic breakdown of the Study Area population.
Gross Floorspace	Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on).
GOAD Plans	Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the 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 floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors.
Local Centres	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.
Net Floorspace	Represents the level of internal area devoted to the sale of goods.
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.
Price Base	The price base for the Study is 210; all prices are or have been adjusted to 2010 in order to be consistent.
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.



Special Forms of Trading	Defined by Experian 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.
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 retail facilities.
Town Centre	A 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.