Town Centres Team, Planning Services

HOLMFIRTH TOWN CENTRE

ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS

SEPTEMBER 2004

INTRODUCTION

Since 1996, Kirklees MC Planning Services has undertaken a programme of research into the health and vitality of shopping centres in the District. The annual collection of key performance data enables the role of individual town centres to be assessed, identifying the scope for change, renewal and diversification.

This document is the fourth annual publication which briefly examines 6 indicators of health and vitality as they relate to Holmfirth town centre. The indicators covered are:

- Shop unit and floorspace occupancy,
- Vacancy rates,
- Pedestrian footfall,
- Retail development pipeline,
- Retailer demand, and;
- Prime retail rental levels.

FLOORSPACE, SHOP UNITS AND VACANCY

A survey of shop unit occupancy undertaken during August 2004 revealed that Holmfirth town centre provides a total of 6,501 sq.m. (69,951 sq.ft.) of net retail floorspace, and 157 shop units. 62% of floorspace in Holmfirth town centre is given over to comparison (non-food) retailing. Figure 1 illustrates the make up of the town in both 2003 and 2004.

Figure 1: Holmfirth shop unit / floorspace statistics

	2003		2004	
	Sales fl'space '000 sq.m	Shop units	Sales fl'space '000 sq.m	Shop units
Convenience (food)	1,834 (27.7%)	13 (8.2%)	1,814 (27.9%)	12 (7.6%)
Comparison[1] (non-food)	4,091 (61.9%)	89 (56.3%)	4,020 (61.8%)	89 (56.7%)
Service	N/A	48 (30.4%)	N/A	49 (31.2%)
Vacant	687 (10.4%)	8 (5.1%)	667 (10.3%)	7 (4.5%)
TOTAL	**6,612 (100%)**	**158 (100%)**	**6,501 (100%)**	**157 (100%)**

Figure 2: Percentage changes 2003-04

	Floorspace	Shop units
Convenience	-1.1%	-7.7%
Comparison	-1.7%	0
Service	N/A	+2.1%
Vacant	-2.9%	-12.5%

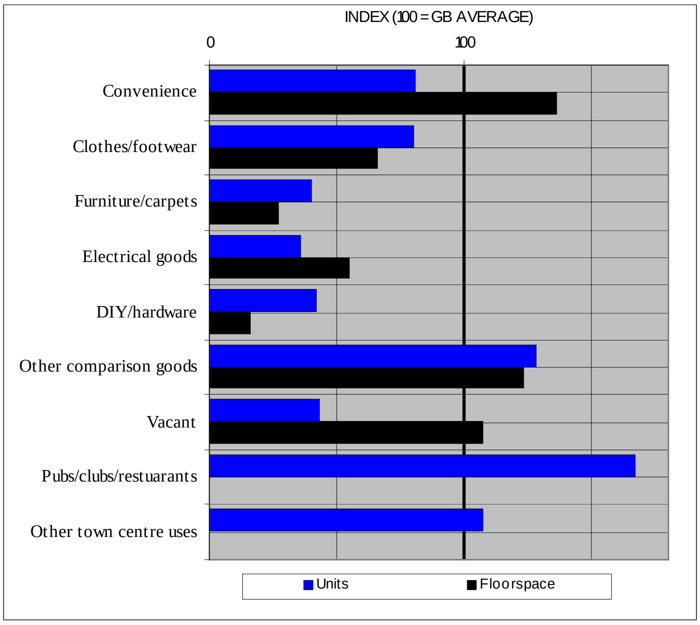
As figure 2 shows there have been a number of small scale occupancy changes within the town over the past 12 months. These have included the unfortunate closure of a greengrocers shop on Victoria Street. Nevertheless, the shop unit vacancy rate is very low, equating to just 4.5% of all units in the centre.

Floorspace vacancy remains a little above the national average, principally due to the former Lodges building which straddles the River Holme in Towngate. This building accounts for more than 70% of the vacant floorspace in the centre.

However, a refurbishment scheme is currently being put together by the owners, Medicare to provide a pharmacy and a number of small shop units.

Of the few national multiples present in Holmfirth, the Co-op foodstore in Crown Bottom is by far the largest. The town mainly consists of small independent shops and services, many of which rely on trade from tourism. Reflecting the tourist trade, there is an above average representation of services such as cafes and restaurants as well as "niche" retailers specialising in crafts, antiques and gifts.

Figure 3: Comparison with national averages[2]



Hardware, electrical goods and furniture retailers are poorly represented in the town as the graph above indicates.

However, this is a pattern of occupancy that has become typical of most shopping centres in the country, and is largely due to the retail warehouse format which allows extensive displays of these "bulky" items.

Opposite: A typical café in Holmfirth

Opposite: Public house on Towngate

Figure 4: Floorspace (sq.m.) and unit comparisons[3]

	Holmfirth	Cleckheaton	Heckmondwike
Convenience	1,814 (27.9%)	1,583 (18.6%)	4,795 (42.2%)
Comparison[1]	4,020 (61.8%)	5,403 (63.6%)	4,968 (43.8%)
Vacant	667 (10.3%)	1,509 (17.8%)	1,584 (14.0%)
Total Retail Floorspace	**6,501 (100%)**	**8,495 (100%)**	**11,347 (100%)**
No. of vacant units	7 (4.5%)	23 (13.4)	33 (20.2%)
Total no. of units	**157 (100%)**	**171 (100%)**	**163 (100%)**

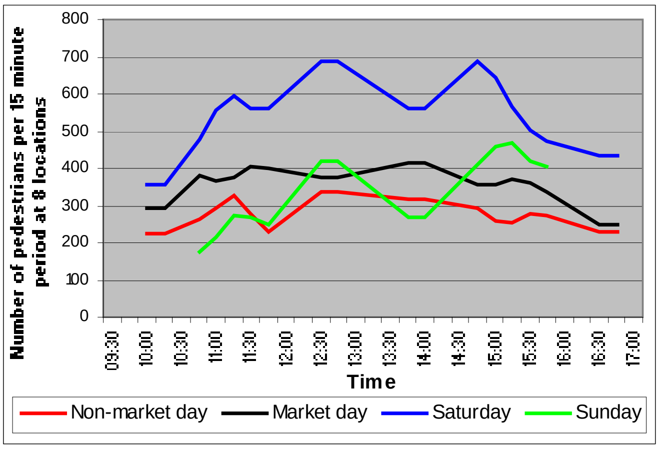
PEDESTRIAN FOOTFALL

Since 2001, pedestrian footfall counts have been undertaken on a twice-yearly basis in Holmfirth to measure the volume and pattern of visitor/shopper movement. The exercise is designed to examine the level of pedestrian activity sampled during the tourist season (August) compared to out of season samples (March). These assessments cover key locations including both primary and secondary shopping frontages and important pedestrian links, which together provide a 'snapshot' of pedestrian activity. Surveys are undertaken on a market day, non-market day, Saturday and Sunday. The map on Page 4 identifies the count locations.

Spring Counts (March)

The 2004 counts showed a slight decrease in pedestrian numbers on a Sunday and non-market day since the previous spring. Victoria Street continues to exhibit the highest footfall on all days except Sunday where the Huddersfield Road/Cooper Lane Junction and Hollowgate both record more pedestrians. Saturday and Sunday footfall both showed a number of peaks and troughs in the pedestrian numbers recorded whereas market day and non-market day footfall remained more consistent throughout the day.

Figure 5: Daily Profile for March 2004



Summer Counts (August)

The summer counts (figure 6) reveal a similar pattern of pedestrian movement around the town. The higher shopper numbers were once again recorded on Victoria Street. High pedestrian numbers were also monitored on Huddersfield Road near Cooper Lane (particularly on a Saturday), and Hollowgate (on a Saturday and Sunday).

Figure 6: Summer 2004 Pedestrian Numbers (2 hour counts)[4]

Day	Non-Market	Market Day	Saturday	Sunday
Weather	Sunny / warm	Overcast/ some rain	Sunny / warm	Sunny / warm
Date	18/08/04	19/08/04	21/08/04	22/08/04
1. Co-op (in only)	391	479	570	513
2. Cooper Lane Jct.	637	590	1,209	559
3. Upperthong Lane Jct.	297	243	571	404
4. Victoria Street	875	939	1,023	678
5. Hollowgate	513	559	942	769
6. Dunford Road	99	71	172	158
7. Towngate (in only)	269	110	71	26
8. Station Road	249	314	595	491
TOTAL	**3,330**	**3,305**	**5,153**	**3,598**
9. New Footbridge (Old Bridge Hotel)	355	384	525	349

*NB. Counts in all directions (unless otherwise stated)

Footfall on a market day has dropped slightly below that of a non-market day in summer. This may be an anomaly although the situation will be closely monitored in future counts.

The summer profile counts (figure 7) show that, as in previous years, Saturday footfall peaks in the late morning, declines over lunchtime and then increases in the afternoon. This in part reflects the tourist nature of Holmfirth as visitors take advantage of the many cafes, pubs and restaurants around lunchtime.

Pedestrian numbers on a Sunday peak in the late afternoon to a level similar to Saturday. Market day and non-market day counts tend to show a more consistent pattern throughout the day.

Figure 7: Daily Profile for August 2004

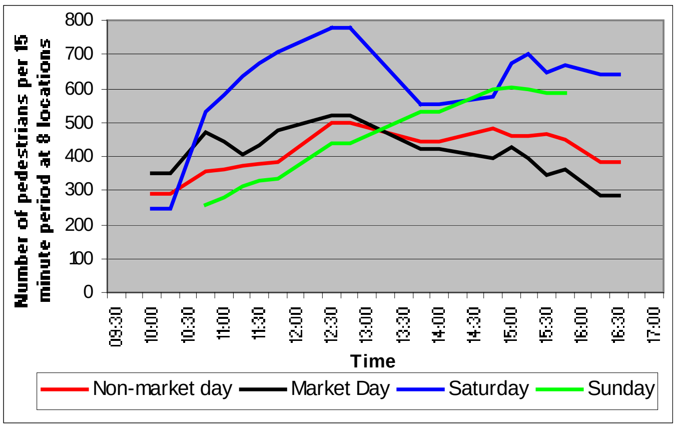
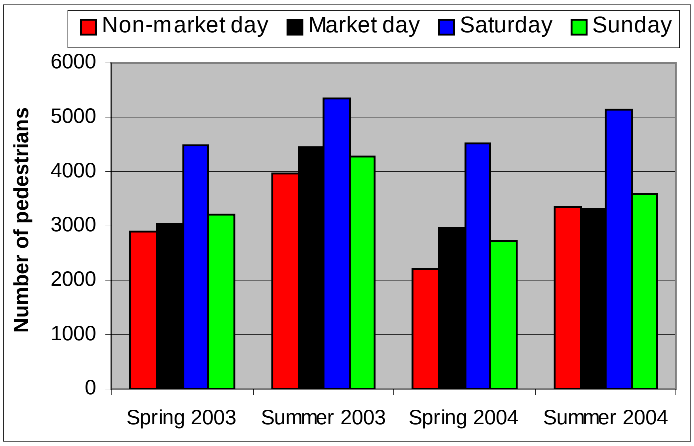


Figure 8 on the next page shows the number of pedestrians recorded within the town centre over a 2 hour period[4] on each of the survey days. Overall, it can be seen that pedestrian numbers are higher during the summer, principally as a result of tourist activity and better weather conditions.

Figure 8: Spring and Summer Counts Comparison, 2004



Pedestrian numbers were also monitored this year over the new footbridge between the bus station and the Old Bridge Hotel. The counts showed that the bridge is well used, particularly by those arriving by bus. The bridge provides an important link between Towngate and Huddersfield Road, through the recently improved Norridge Bottom.

DEVELOPMENT PIPELINE

Over the last 12 months, retail development activity in the town centre has generally been small-scale conversion/ refurbishment schemes. However, plans are currently being drawn up to refurbish the former Lodges building in Towngate to provide a pharmacy and a number of small shop units.

Improvement works have recently been undertaken in Norridge Bottom, Hollowgate and Huddersfield Road as part of the Council's Local Public Service Agreement or LPSA (for more information on this please see last year's Holmfirth Annual Statement). These have involved new lighting, street paving and landscaping in order to improve the townscape environment.

Left: Norridge Bottom streetscape improvements

Right: The completed bridge to Towngate

RETAILER DEMAND

A general assessment of demand for retail and leisure floorspace in Holmfirth was undertaken during April 2004. Figure 9 shows the numbers of companies who have expressed interest in being represented in the town, and their maximum floorspace requirements.

Figure 9: Retail / leisure requirements 2004

Category	Number of registered interests	Maximum floorspace requirement sq.m. (sq.ft)
Clothing/footwear	1	651 (7,000)
Specialist comparison	2	697 (7,500)
Restaurants/pubs	1	558 (6,000)
TOTAL	**4**	**1,906 (20,500)**

Source: FOCUS Information Ltd and KMC

Registered requirements amount to 4 separate interests – 3 more than last year. All 4 of these would be new to the town amounting to a maximum floorspace of 1,906 sq.m. (20,500 sq.ft.).

Further requirements may exist from other retailers who wish to relocate or establish themselves within the town centre but have not registered their interests. This assessment does not address the demand for office accommodation from financial, professional or other commercial uses.

Left: Artist studio on Huddersfield Road

Right: Semi-retail uses on Huddersfield Road

PRIME RETAIL RENTAL LEVELS

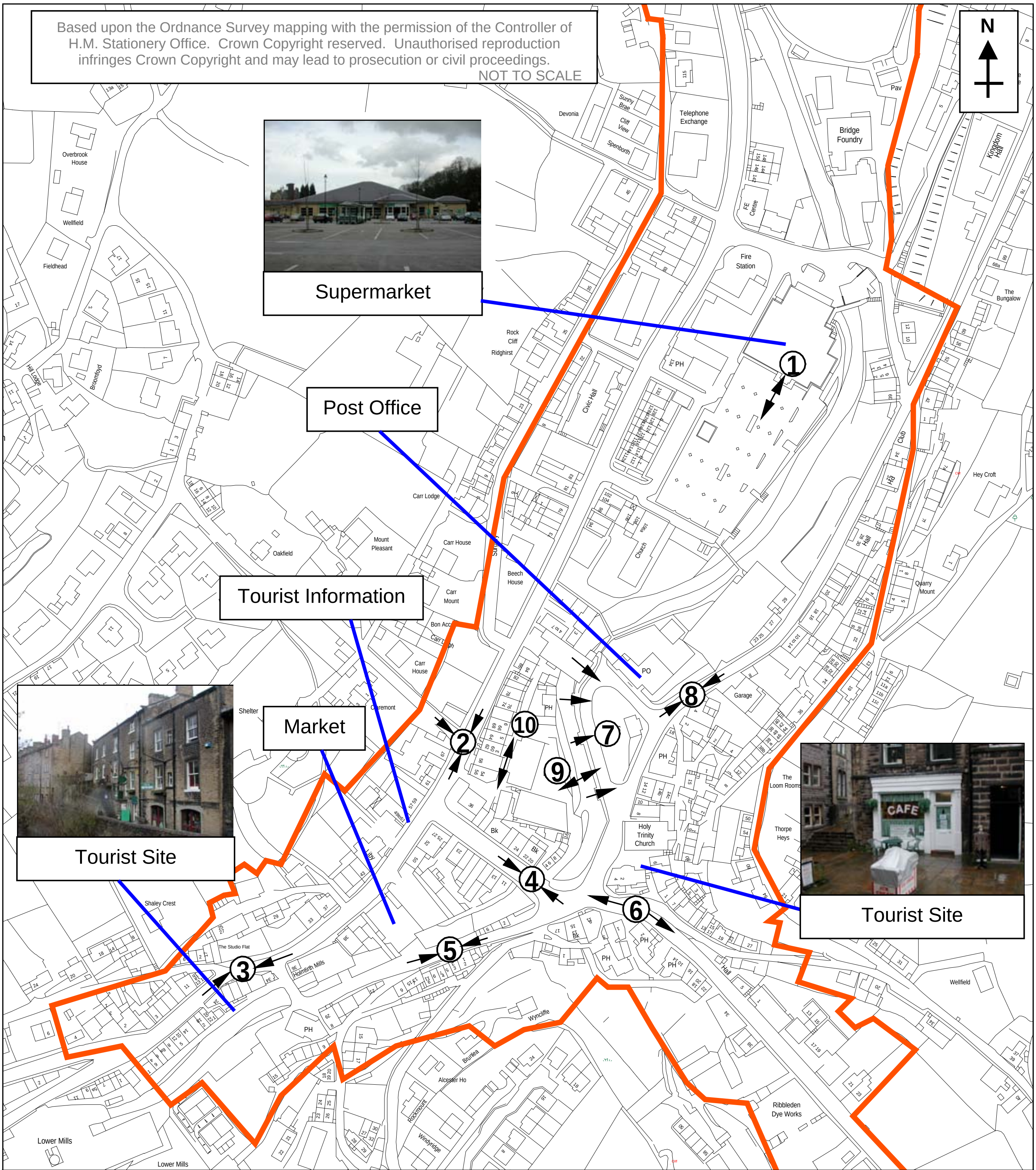
Due to the size of the town centre, the nature of occupancy and the few property transactions that have taken place, information on rental levels is difficult to obtain.

Nevertheless, the last 12 months has seen a slight increase in retail rents within the shopping core – the Victoria Street / Huddersfield Road area. Here, rents are now in the region of £129-£194 per sq.m. (£12-£18 per sq.ft.). In peripheral shopping locations, rents of £54 per sq.m. (£5 per sq.ft.) can still be found.

Rents are very much influenced by the quality of accommodation provided and, in the case of premises outside the shopping core, by the proximity of specific "attractions" such as Nora Batty's steps.

Notes:
[1] Comparison goods figures include A1 uses such as opticians and travel agents etc.
[2] Based on the UK average, 100 being the average proportion of floorspace or number of units for certain categories of use in a UK town, not including markets.
[3]Figures relate to the floorspace contained within the Town Centre Audit Study Boundary of each centre at the most recent published survey date.
[4]The hour counts are conducted for 1 hour in the morning (10.30-11.30) and 1 hour in the afternoon (2.30-3.30).

HOLMFIRTH TOWN CENTRE PEDESTRIAN COUNT POINTS



Key to map

Position/direction of count

Study boundary

1. **Co-op main entrance** (in only)
2. **Huddersfield Rd / Cooper Lane** (3 ways)
3. **Upperthong Lane / Huddersfield Rd** (2 ways)
4. **Victoria Street** (2 ways)
5. **Hollowgate** (2 ways)
6. **Dunford Road** (2 ways)
7. **Towngate** (people entering town by bus)
8. **Station Road** (2 ways)
9. **New Bridge** (2 ways)

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