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# HUDDERSFIELD TOWN CENTRE AUDIT 2002
## FACT SHEET 3: RETAIL ACTIVITY AND MOVEMENT

### Introduction

This document, produced by Kirklees MC's Planning Service, is designed to provide supplementary information on retail floorspace and shop units, vacancy rates, development pipeline, national multiple representation and take up, to accompany the 2002 Town Centre Audit for Huddersfield (in A1 folded form). This is one of a series of Fact Sheets that contain detailed analysis of the indicators of town centre performance presented in the main publication.

### Retail floorspace and shop units

The floorspace and occupancy survey for 2002 revealed that Huddersfield town centre provides 86,850 sq.m. (934,506 sq.ft.) of net retail floorspace, which represents an increase of 14% over the last 12 months. 68.2% of this is devoted to comparison goods with a further 19% devoted to convenience goods. Figures 1 and 2 show the changes in retail floorspace and shop unit numbers since 1999.

**Figure 1: Retail floorspace (net '000 sq.m.)**

| | Convenience | Comparison[1] | Vacant | TOTAL |
|---|---|---|---|---|
| **1999** | 16.64 (20.4%) | 51.98 (63.6%) | 13.04 (16.0%) | **81.66 (100%)** |
| **2000** | 16.95 (21.2%) | 47.42 (59.3%) | 15.59 (19.5%) | **79.96 (100%)** |
| **2001** | 16.49 (21.6%) | 51.17 (67.2%) | 8.51 (11.2%) | **76.17 (100%)** |
| **2002** | 16.52 (19.0%) | 59.21 (68.2%) | 11.12 (12.8%) | **86.85 (100%)** |
| **% change 2001 - 02** | **+0.2** | **+15.7** | **+30.6** | **+14.0** |

**Figure 2: Number of shop units**

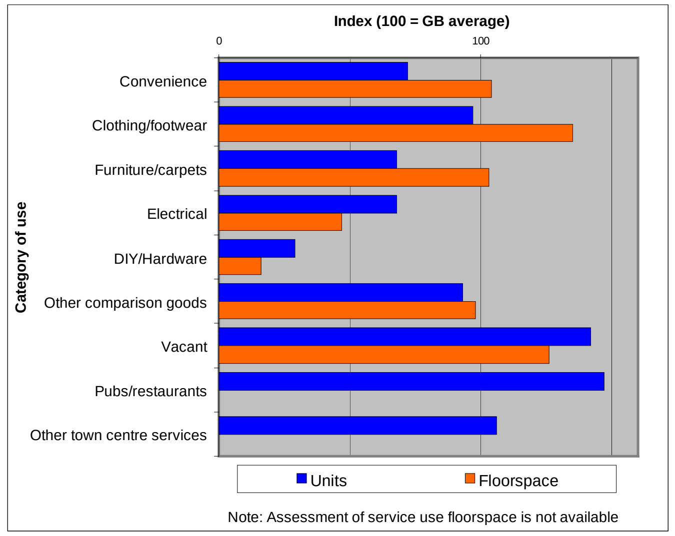
| | Convenience | Comparison | Service | Vacant | TOTAL |
|---|---|---|---|---|---|
| **1999** | 59 (8.1%) | 380 (52.4%) | 191 (26.3%) | 96 (13.2%) | **726 (100%)** |
| **2000** | 56 (7.9%) | 367 (52.1%) | 188 (26.7%) | 94 (13.3%) | **705 (100%)** |
| **2001** | 51 (7.3%) | 366 (52.7%) | 192 (27.6%) | 86 (12.4%) | **695 (100%)** |
| **2002** | 51 (6.9%) | 373 (50.5%) | 198 (26.8%) | 117 (15.8%) | **739 (100%)** |
| **% change 2001-02** | **0** | **+1.9** | **+3.1** | **+36.0** | **+6.3** |

[1] Comparison goods figures include A1 uses such as opticians and travel agents etc.

After a decline in the number of retail units and the total floorspace in Huddersfield town centre during the 2000 - 2001 period (partly due to demolition work to make way for the Kingsgate Centre), an increase has been recorded over the last 12 months. This is primarily due to the completion of the Kingsgate Shopping Centre, which has provided 46 new shop units giving an additional net floorspace of 13,600 sq.m. in the town. At the time of the survey (2002), several units within the new centre (30%) were unoccupied. This, combined with the effects of some businesses re-locating out of the prime pitch into Kingsgate, has increased the town's vacancy rate. These vacancies are likely to be temporary in nature, and are symptomatic of the 'transitional' phase through which any town passes following major town centre redevelopment. Nevertheless, vacancy in the town and in particular secondary shopping streets will need to be closely monitored.

The proportion of retail floorspace given over to convenience goods has slightly decreased, with a corresponding increase in comparison goods representation within the town. This growth in comparison goods floorspace and units is again attributable to the Kingsgate Shopping Centre. Redevelopment of the Queen Street and King Street Yards has also led to an increase in service uses as new pubs, restaurants and bars have opened as part of this scheme.

**Figure 3: Retail floorspace and shop units: comparison with the national average (UK average indexed to 100)**




As Figure 3 indicates, Huddersfield exhibits a strong representation of clothing/footwear retailers. This has been brought about by the retail mix of Kingsgate which has a strong bias towards fashion. With regard to leisure facilities, there is also a good representation of pubs/clubs and restaurants within the town, reflecting the growth in the evening economy, supported primarily by the large student population.

The closure of Do It All 2 years ago is the principal reason why DIY/Hardware representation in the Study Area is so poor. Similarly the loss of Comet and Scottish Power (large warehouse traders) over the same period, explains the low proportion of floorspace given over to electrical retailing.

A comparative analysis with other nearby towns (Figure 4), shows that Huddersfield town centre has a similar vacancy rate to Barnsley. It also has the largest number of shop units of the towns assessed. Wakefield continues to exhibit the greatest proportion of floorspace given over to comparison goods trading – 81.2% as opposed to 69.4% in Huddersfield. The presence of Tesco and Sainsburys within Huddersfield town centre explains the high level of convenience goods floorspace.

**Figure 4: Floorspace comparisons ('000 sq.m.)**

| | Huddersfield* | Barnsley | Wakefield | Halifax |
|---|---|---|---|---|
| **Convenience** | 12.0 (15.9%) | 7.04 (11.7%) | 6.61 (10.7%) | 3.80 (8.3%) |
| **Comparison**** | 52.36 (69.4%) | 43.79 (72.8%) | 51.55 (81.2%) | 36.60 (80.5%) |
| **Vacant** | 11.12 (14.7%) | 9.32 (15.5%) | 5.03 (8.1%) | 5.10 (11.2%) |
| **Total retail floorspace** | 75.45 (100%) | 60.15 (100%) | 63.19 (100%) | 45.50 (100%) |
| **Vacant units** | 117 (16.0%) | 81 (18.2%) | 56 (9.7%) | 81 (12.9%) |
| **Total number of units** | **733 (100%)** | **445 (100%)** | **576 (100%)** | **629 (100%)** |

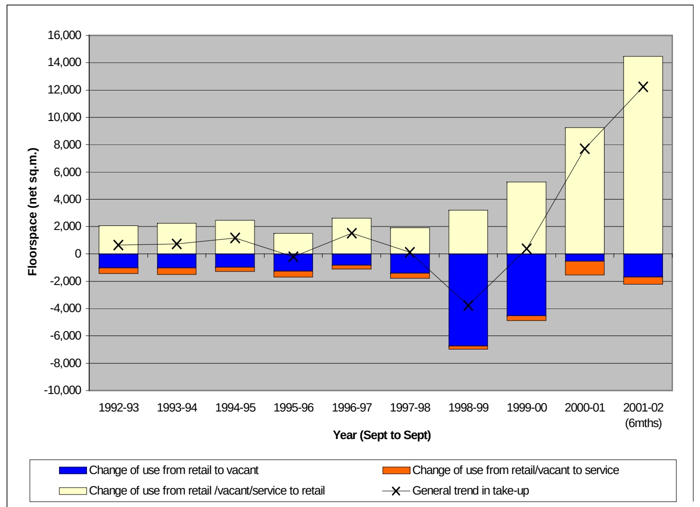
* Huddersfield figures exclude Shorehead Sainsburys and the Beck Road Retail Warehouse Park
**Comparison floorspace figure also includes A1 uses such as travel agents, optician's etc.

## Take up of retail floorspace

Figure 5 quantifies the take up of retail floorspace since 1989, distinguishing between retail occupancy, service use occupancy and vacancy. As can be seen, positive take up has been recorded for the third consecutive year. This is where either vacancy or changes out of retailing have not dominated the pattern of retailer movement.

Since the 1998 Town Centre Audit, there has been some considerable fluctuation in the take-up of retail floorspace in Huddersfield. During the 1998/99 period, the town saw a significant decline in take-up primarily due to the vacation of the Co-op 'Living' department store on New Street.

**Figure 5: The pattern of floorspace take-up since 1992/93**




By the 2000/01 period, changes of use into retailing had dramatically increased with the re-occupation of the former C&A unit by Primark (New Street) and activity on the retail warehouse park at Beck Road to accommodate Matalan, Tradex and MFI.

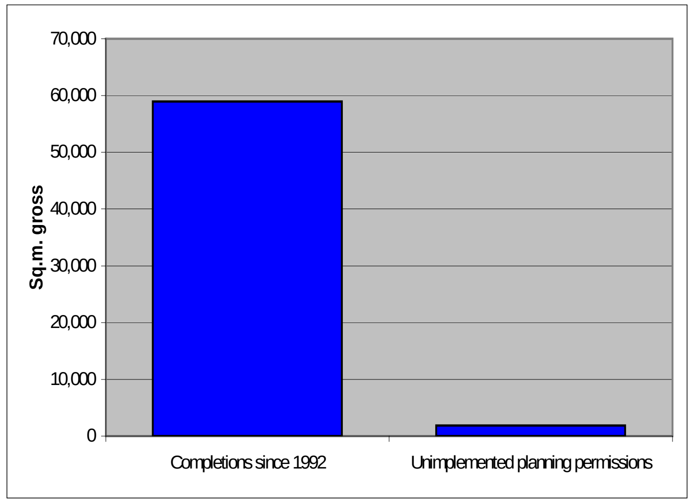
Furthermore, in just the 6 months to March 2002, the pattern of retail movement has been dominated by the opening of the Kingsgate Shopping Centre, which provides 13,600 sq.m. of new net retail floorspace.

Despite the positive effects of Kingsgate on retail floorspace take-up, there has been a loss of retail activity in the prime pitch of the town during the same 6 month period. The re-location of businesses into the new centre has resulted in an increased vacancy level within the primary shopping area. However, this is likely to present opportunities to accommodate retailers who have an unsatisfied requirement for retail premises in the town (see Fact Sheet 4).

## Retail development pipeline

Figure 6 identifies the retail development pipeline within and adjoining Huddersfield town centre. Since 1992, a total of 58,955 sq.m. of gross retail development has been completed within the Study Area. The majority of this is made up by the Kingsgate Centre but other schemes since the 1998 Audit include the extension to the Great Northern Street retail warehouse park, the Queen Street /King Street yards redevelopment, the refurbishment works of the ex-Gala Bingo hall on Kirkgate and the ex-Tudor cinema on Zetland Street to form 3 public houses, and the conversion of the ground floor of John William Court to form retail premises.

**Figure 6: Retail development pipeline**




There remains only one unimplemented planning permission within the Huddersfield town centre Study Area. This relates to the site bounded by Green Street, St John's Road and the railway viaduct to the north of the town where permission exists to create a mixed use development (retail and leisure) of 1,860 sq.m. gross.

## Market trading

Huddersfield's outdoor market operates from the Byram Street/ Brook Street area to the north of the town adjacent to the Tesco foodstore. The market trades 4 days a week with the Tuesday traders selling only second hand goods. Huddersfield also offers a covered market hall off Queensgate at the opposite end of the town, which trades 6 days a week. 256 stalls are available within the open market with a further 72 businesses operating in the Queensgate market hall.

The open and covered markets in the town are popular shopping attractions. Byram Street is an important pedestrian link between



the open market and the primary shopping area. However, it is noted that the draw of the open market has weakened in recent years. Unlike the open market in Dewsbury, it does not have sufficient strength of attraction to increase shopper numbers in the town as a whole.

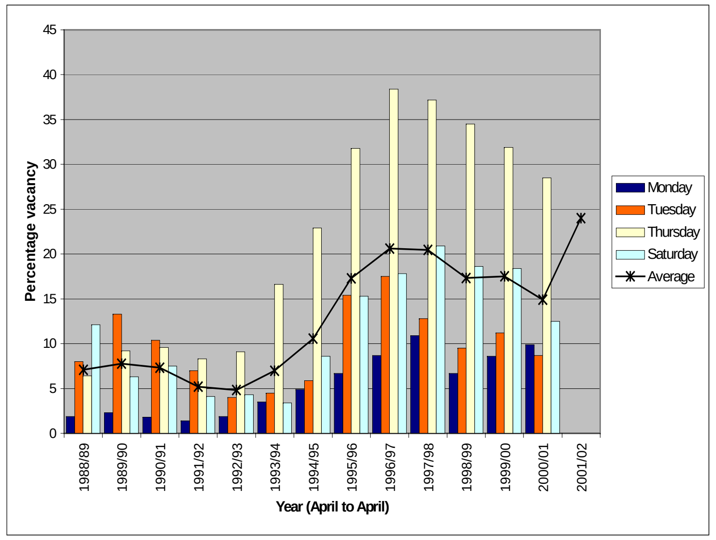

Queensgate Market Hall

The open market has seen a number of aesthetic improvements during the last 2 years. The canopy and entrances to the market itself have been enhanced and streetscape improvements have been implemented along Brook Street and the northern part of Byram Street, creating a more pleasant and safe environment for those shopping at the market.

Following these improvements, the open market average weekly vacancy dropped by 2.6% to 14.9% in 2000/01 – the lowest rate since 1994/95. After a peak in 1996/97, decreases in the average vacancy rate of the market were recorded annually for 4 years. However, the most recent vacancy assessment reveals a peak of 24.0% - the highest recorded rate in 14 years.

The Queensgate market has experienced much lower vacancy rates – ranging from only 0.5% in 1993/94 to a high of 6.5% during the last 12 months.

**Figure 7: Open market vacancy rates since 1988/89**
Source: Estates, Property and Markets Services




## National multiple traders

Huddersfield's prime shopping core is defined by New Street, Princess Alexandra Walk, the Packhorse Centre, Victoria Lane Upper King Street and, more recently, the new Kingsgate Shopping Centre. Most of this core is pedestrianised and provides an attractive shopping environment which is reflected by high pedestrian flows and strong representation of national multiples.

**Figure 8: National multiples in Huddersfield***

| | 1996 | 1998 | 2002 |
|---|---|---|---|
| **Prime Pitch** | 60% | 69.7% | 67.0% |
| **Kingsgate**** | - | - | 74.0% |
| **Packhorse Centre** | 35% | 41.0% | 39.0% |
| **Town Total** | 29% | 32.6% | 37.0% |

*Based upon occupied retail units only, including national charity shops
**Kingsgate results are correct as of March 2002 and are set to increase as vacant units become occupied

Figure 8 shows that 67% (two thirds) of prime pitch retail units are occupied by national multiple retailers. This represents a slight decrease on the 1998 assessment but is still significantly higher than in 1996. National multiple representation in the Packhorse Centre is weaker (39%) primarily because shop units in the covered mall lack the necesssary depth to satisfy the size requirments of many national multiple companies.


Kingsgate and the Yards

As a whole, national multiple representation in the town has increased by 4 percentage points since the 1998 Town Centre Audit, and is almost a third higher than in 1996. This is likely to increase further as the Kingsgate Centre becomes fully let and vacant units within the prime pitch are re-occupied.

Multiple retailers within the town include Marks and Spencer, Woolworths, Next, Principles, Dixons, BHS, Mothercare, WH Smith and Boots. The additional floorspace provided by the Kingsgate Centre has recently added retailers to this list such as GAP, TK Maxx, Beatties and other national multiples not previously represented in the town. These new operators have gone some way to addressing the shortfalls in shopping provision which were identified in the 1998 Town Centre Audit. The representation of department stores and of clothing and footwear retailers now well exceed the national average in terms of floorspace.