PROPOSED FOODSTORE DEVELOPMENT,

CLECKHEATON, WEST YORKSHIRE

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1. INTRODUCTION

1.1 Kirklees Metropolitan Council's Planning Service instructed Signet Planning Limited on 20 February 2007 to assess the scale of foodstore development required to serve the town of Cleckheaton, and whether it is both appropriate and reasonable in the context of PPS6 guidance to allow two large foodstores to trade. The proposed foodstores are:

1. An extant planning permission for foodstore development of 5,650 sq.m. gross on a site known as Northgate/Bradford Road, adjoining the town centre, and

2. A recent planning application for foodstore development of 7,720 sq.m. gross with 686 sq.m. of small unit retail accommodation on a site known as Northgate/Serpentine Road within the town centre.

1.2 In order to make a decision on this matter, it is relevant to determine the acceptability of foodstore development in terms of the following:

A. Retail need;
B. Economic impact; and
C. Scale

1.3 However, Cleckheaton has a complex history in seeking opportunity to enhance its retail offer in respect of foodstore provision. This is briefly outlined below.

2. HISTORY

2.1 The Council favourably considered a planning application in 2001 for a new Tesco foodstore on St Pegs Lane of 6,610 sq.m gross, on the grounds that there were no other sequentially preferable sites available that could accommodate the development proposed (planning application no. 99/62/92079). At the same time, the Council refused planning permission for foodstore development on a free standing site along Bradford Road (Asda) on the grounds that (inter alia) a single foodstore was sufficient to meet recognised need, that further development would adversely impact upon the vitality and viability of Cleckheaton and nearby shopping centres, and that the St Pegs Lane site was sequentially preferable to the Bradford Road site.

2.2 The Tesco foodstore proposal was 'called-in' by the Secretary of State and following an inquiry was refused in 2002. During the call-in inquiry, Magellan Properties Limited pursued a development scheme for foodstore construction on a site adjoining the town centre known as Northgate/Bradford Road. The Inspector considered that having regard to its location adjoining Cleckheaton town centre, the developers should be given opportunity to assemble the site to meet the recognised quantitative and qualitative need for foodstore development to serve the Cleckheaton area.

2.3 Consequently, outline planning permission was granted to Magellan Properties Limited in March 2003 for a 5,650 sq.m. gross foodstore on the Northgate/Bradford Road site (planning application no. 2001/60/92868). All reserved matters were approved in November 2005 (planning application no. 2005/61/91881). To date, no work has commenced on the site.

2.4 Tesco submitted a detailed planning application in October 2006 for the redevelopment of their existing foodstore and car park in the town centre (including land adjoining in Serpentine Road) to provide a 7,720 sq.m. gross foodstore and 686 sq.m. gross small retail unit accommodation (planning application no. 2006/62/94559). The application has yet to be determined.

3: CONSIDERATIONS

A. Retail Need

3.1 The Council's Retail Capacity Study is based on a district-wide householder questionnaire survey undertaken in 2003, which assessed the pattern of consumer retail expenditure flows between post code districts and shopping centres/facilities for both food and non-food purchases. The exercise quantified the level of retail headroom expenditure and translated these into floorspace equivalents.

3.2 Whilst this provided an accurate picture of shopping patterns at the time, it is important to bear in mind that there have been a number of changes to the attractiveness of individual shopping centres in recent years which would have impacted upon the level of draw from post codes throughout the district. In other words, the pattern of draw has probably changed, particularly in terms of convenience good shopping in North Kirklees. This, in turn, would influence the derived turnover attributed to individual shopping centres.

3.3 It is likely that the construction of a Tesco Extra store in Batley has significantly impacted upon the pattern of food shopping in this part of the district. However, the level of change can only be determined through a new householder survey. Therefore, the published 2003 Capacity Study and its projection to 2008 should be cautiously used. The process of identifying retail capacity is a theoretical exercise which depends upon a range of data input. Only modest revisions to any of the variables used can bring about considerable changes in the results of the capacity forecast. Therefore, the out-puts from a Capacity Study should be treated as a general guide only and should not be applied prescriptively. This point has been made by the Secretary of State in a number of planning appeals where it has been accepted that turnover does not have to specifically equal the identified surplus in expenditure.

3.4 Having regard to the above, the Kirklees Retail Capacity Study provides a useful 'general guide' to what is appropriate in terms of retail floor space growth. Importantly, the exercise has acknowledged a number of changes to the key variables used in determining retail floor space capacity (for example, i) new retail floor space through the implementation of commitments; ii) per capita expenditure growth rates; iii) population increase; iv) sales densities; and v) floor space deficiency ratios), and so is up to date as far as is possible without undertaking a new householder survey.

3.5 Both the published Retail Capacity Study 2003-2008 and the unpublished 2012 projections furnished by Kirklees Planning Services to assist in the preparation of this report, indicate that following the construction of a single large foodstore in Cleckheaton, there will not be a sufficient level of consumer expenditure to support further convenience good floor space. In fact, the implementation of all foodstore commitments in North Kirklees would result in an over-supply of convenience goods floor space equivalent to around £50m of consumer expenditure by 2012. Even allowing for enhanced market penetration from beyond the Kirklees administrative boundary, and allowing for increased trade capture from the South Kirklees area, North Kirklees will still exhibit negative floor space capacity for convenience goods in 2012. This means that the Council will need to closely monitor shopping centre performance in the coming years and in particular vulnerable centres such as Heckmondwike, Mirfield and to a lesser extent Dewsbury, as evidence of under-trading will begin to emerge in this part of the district. This could manifest itself in extreme cases in the form of an increase in shop vacancy, changes to the nature of retail occupancy and inhibition of private sector investment. As a consequence, certain shopping centres are likely to undergo changes in how they are able to serve their respective communities.

3.6 It is important to note that both the Council's evidence, and that presented by Tesco in respect of the St Pegs Lane, Cleckheaton Call-In Inquiry held in 2001 concluded that in terms of retail need, there is only sufficient consumer expenditure to support the construction of one large foodstore to serve the Cleckheaton area. This was accepted by the Inspector at the time. The Council's Retail Capacity Study (and the projections to 2012) indicates that further convenience goods floor space growth in North Kirklees (excluding small scale qualitative improvements to address localised need) would result in significant over-supply which is likely to impact on established shopping centres.

3.7 There is a need to update the Council's Retail Capacity Study to more accurately reflect changes to shopping patterns that have occurred as a result of new development. This would allow the Council to make informed decisions about further retail floorspace growth throughout the Kirklees area. However, it is nevertheless clear that based upon the forecast level of consumer expenditure generated by residents within the North Kirklees area generally and within Cleckheaton in particular, there is only opportunity to provide for a single large foodstore in Cleckheaton.

B. Economic Impact

3.8 The Retail Impact Assessment undertaken by the Council in respect of the 2001 Call-In Inquiry concluded that the level of impact from the construction of a single foodstore in Cleckheaton would be within acceptable limits, with the majority of trade being captured from comparable facilities catering for bulk food shopping needs. In this regard, Tesco in Cleckheaton, Morrisons in Heckmondwike, Sainsburys and Asda in Dewsbury, and Tesco in Batley were anticipated to bear the brunt of the impact. The level of impact on other convenience shops in Cleckheaton town centre was considered to be acceptable, subject to a sufficiently strong anchor retailer maintaining a presence in the town in order to ensure the maintenance of good levels of pedestrian footfall.

3.9 However, the construction of two large foodstores to serve the same catchment area does raise concern over the level of trading impact upon Cleckheaton town centre and upon nearby town centres and facilities.

3.10 In terms of retail impact, it is important to note that where two foodstores have sought to locate in close proximity to each other the total actual sales achieved is likely to be lower than the sum of the potential sales which each might theoretically enjoy separately. The 'overlap' of goods and ranges is particularly marked in terms of convenience goods sales. Therefore, sales densities need to be revised accordingly. It is broadly accepted that the combined turnover over two such stores tend to be in the range of about 1.5 – 1.7 times the average turnover of the two individual stores.

3.11 If we examine the anticipated convenience turnover of both the proposed Asda and Tesco foodstores using the most recently sourced data, the following is revealed:

- Tesco food sales : £37.488m (2003 prices). This is based on net convenience floor space of £3,253 sq.m. and a sales density of £11,524 per sq.m. (amended to take account of petrol filling station sales, vat and floor space efficiency of 0.2% growth per annum).

- Asda food sales : £34.166m (2003 prices). This is based on net convenience floor space of £2,788 sq.m. and a sales density of £12,255 per sq.m. (amended to take account of petrol filling station sales, vat and floor space efficiency of 0.2% growth per annum).

3.12 The convenience goods turnover of the two food stores would total a significant £71.654m (utilising average sales densities). However, having regard to paragraph 3.10 above, the combined turnover of the two stores trading in very close proximity to each other is likely to be between £53.7m and £60.5m. It is this turnover range that has been used in the calculations of retail impact below.

3.13 Similarly, the comparison goods turnover of the two proposed food stores needs to be amended, but the level of 'overlap' in terms of goods and product ranges is not so marked. Therefore, the combined turnover of the two is likely to be in the range of 1.8-1.9 times the average turnover of the two individual stores. This would be around £13.5m.

3.14 The proposed Tesco foodstore will replace their existing store in the town which, according to the Retail Capacity Study is trading above benchmark turnover levels (although since the opening of the Tesco Extra in Batley it is likely that its sales density has been affected). By deducting this sum from the anticipated turnover of the two stores combined, identifies net additional convenience turnover of between £29.25m and £36.41m. There is little comparison goods floor space within the existing Tesco store in Cleckheaton so the net additional comparison goods turnover will be £13.5m.

3.15 A traditional step by step market share approach has been adopted for the impact assessment based on the general shopping patterns revealed through the householder survey. These stages are summarised below. Appendix 1 contains the economic assessment. These tables demonstrate the potential retail implications arising from the proposed development. This assessment has been undertaken on a convenience goods basis (at 2003 prices). Appendix 2 contains the socio-economic profile of Cleckheaton which has determined expenditure per head.

Population

	2010
0-5 minutes	43,841
5-10 minutes	157,519
10 minutes +	-
Total	201,360

Expenditure per Head : Convenience and Comparison Goods

		2010
0-5 minutes	Convenience Comparison	£1,472 £3,653
5-10 minutes	Convenience Comparison	£1,428 £3,334

Consumer Expenditure : Convenience and Comparison Goods

		2010
0-5 minutes	Convenience Comparison	£64,534,000 £160,152,000
5-10 minutes	Convenience Comparison	£224,937,000 £525,168,000

3.16 Two foodstores would draw the bulk of their trade from the primary catchment area defined by the 0-5 and 5-10 minutes drive times as detailed below in tables 1 and 2:

Table 1: Convenience Goods : Trading Impact on Catchment Area (2010)

Drive Time	Population	Expenditure in Zone	% Trade	Turnover	Average Zonal Impact
0-5 minutes	43,841	£64.534m	40%	£24.188m	37.5%
5-10 minutes	157,519	£224.937m	45%	£27.211m	12.1%
10 minutes +	-	-	15%	£9.071m	-
Total	201,360	£289,471m	100%	£60,47m	

Table 2: Comparison Goods : Trading Impact on Catchment Area (2010)

Drive Time	Population	Expenditure in Zone	% Trade	Turnover	Average Zonal Impact
0-5 minutes	43,841	£160.152m	40%	£5.4m	3.4%
5-10 minutes	157,519	£525.168m	45%	£6.075m	1.2%
10 minutes +	-	-	15%	£2.025m	-
Total	201,360	£685.32m	100%	£13.5m	

Convenience Goods

3.17 The estimate of trading impact is contained in Appendix 1 and a summary is provided in the table below. It can be seen that trade loss for Cleckheaton, Heckmondwike and Batley town centres will be significant following the construction of two foodstores. However, it is important to note that new foodstores tend to compete most intensively with established outlets fulfilling the same function. Consequently, stores such as the two foodstore proposals which are aimed at primarily catering for the weekly or less frequent food shopper, will compete more directly with existing stores performing the same function. In contrast, small food shops which are used predominantly for day to day convenience purchases will not be likely to face significant competition from a large new store catering essentially for a different form of food shopping, although inevitably some residents living close to the stores may utilise them also for these purposes.

3.18 The bulk of the impact in respect of Cleckheaton town centre will be borne by the existing Tesco foodstore (whose turnover will be assimilated into that of the new store). There would be an impact on smaller convenience outlets in the town centre, although this would be of a small scale and would be, in part, offset by the increase in shopper numbers attracted to the town by the presence of two large foodstores. However, the reaction of each foodstore to the marketing strategy of the other may result in frequent retaliatory action which may impact on local traders (loss leaders, niche targeting etc).

3.19 The impact of more than 13% on Batley town centre will largely fall on the Tesco Extra store. The town has seen significant floor space growth in recent years and is sufficiently vital and vibrant to be able to weather the impact. However, Heckmondwike town centre is a concern. Despite being anchored by a large Morrisons foodstore the town is very vulnerable. Morrisons has been subject to a cumulative level of trading impact which has seen the strength of its trade draw weaken following construction of successive foodstores in North Kirklees – Asda in Dewsbury and Tesco in Batley. In terms of further commitments, planning permission has been granted for foodstore development in Ravensthorpe and in Cleckheaton. However, the construction of two foodstores in Cleckheaton would not result in the closure of Morrisons in Heckmondwike but would nevertheless reduce its turnover and the number of shoppers using the store. This, in turn, would reduce spin-off to town centre traders, and any reduction in shopper numbers would have an economic impact as many of these traders are marginal in terms of viability. The town already exhibits signs of a shopping centre in decline – high shop unit vacancy, limited variety/quality of retail offer, an absence of private sector investment and a relatively poor shopping environment.

Convenience Goods Trade Diversion 2010

Town	Turnover Derived from Catchment Area	Trade Loss
Centres within Kirklees:		
Cleckheaton	£6.77m (£24.154m)	25% (90%)
Heckmondwike	£7.11m	16.5%
Batley	£8.27m	13.1%
Dewsbury	£5.36m	6.1%
Mirfield	£0.67m	4.5%
Huddersfield	£1.07m	0.6%
Centres outside Kirklees:		
White Rose	£1.94m	
Brighouse	£1.66m	
Morley	£0.82m	
Buttershaw	£0.5m	
Dudley Hill	£2.17m	
Morrisons, Bradford	£1.33m	
Other	£5.42m	

Comparison Goods

3.20 As can be seen from Table 2, the average impact within the 0-5 minute drive time is only 3.4%. Anticipated growth in per capita expenditure will cushion levels of impact on Cleckheaton and on nearby shopping centres. For example, between 2006 and 2010, the level of consumer expenditure on comparison goods just within the 0-5 minute drive time will increase by £29.395m, and within the 5-10 minute drive time by £96.472m. Therefore, in terms of comparison goods trade the impact from two large foodstores will be within acceptable limits.

C. SCALE

3.21 Having regard to the above, it is clear that in terms of retail need and impact Cleckheaton can only really support the construction of a single large foodstore. A further point to consider is that of scale. PPS6 comments that **"…the aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and that it complements its role and function"** (paragraph 2.41).

3.22 The issue of scale was addressed in the 2001 Call-In Inquiry where it was concluded by the Inspector that the size of foodstore proposed was appropriate to the size, role and function of Cleckheaton (defined as a town centre in the Kirklees Unitary Development Plan). However, provision of two large foodstores will result in an unbalanced centre in terms of scale and the nature of the retail offer.

3.23 The town of Cleckheaton provides some 12,538 sq.m. gross retail floor space (including vacant floor space). The two foodstore proposals will provide a total of 13,370 sq.m gross floor space. Taking account of the demolition of the existing Tesco foodstore, development would therefore represent an increase of 92% (nearly doubling the size of the town). In terms of the proportion of floor space devoted to foodstore provision, development would represent 55% of total town centre retail floor space. Therefore, the presence of two large foodstores will dominate the form, structure and function of the town centre and this will be contrary to PPS6 which states that it is important that development 'fits' into the centre and 'complements' its role and function.

4: CONCLUSION

4.1 Based upon (i) the forecast levels of consumer expenditure generated by residents within the North Kirklees area generally and within Cleckheaton in particular, and (ii) the anticipated trading impact of two foodstores, there is only opportunity to provide for a single large foodstore in Cleckheaton to meet a recognised quantitative and qualitative need. The provision of more than one to serve the same catchment area would result in a level of under-trading of vulnerable shopping centres and facilities which is likely to require certain centres to undergo change which may impact upon how they are able to serve their respective communities.

4.2 In terms of scale, whilst one large foodstore would be appropriate to the size, role and function of Cleckheaton, the provision of two large foodstores would result in an unbalanced centre in terms of scale and the nature of the retail offer. Rather than complement the town's role and function, the development would only dominate what is a relatively small traditional town centre.

4.3 It is therefore a case of choosing between the two foodstore sites – Northgate/Serpentine Road, or Northgate/Bradford Road. Very briefly:

- The Northgate/Serpentine Road site is located largely within the defined town centre boundary and the development scheme would provide (in addition to a new foodstore), small unit accommodation adjoining the proposed store's main town centre pedestrian access. Development of the site would also secure the improvement of a very dated and tired store and a part of the town centre that is of poor environmental quality.

- By comparison, the Northgate/Bradford Road site is located immediately adjoining the defined town centre boundary. Development provides for no more than the construction of a single large foodstore, although it would secure the improvement of an area of Cleckheaton that is rundown and environmentally poor.

4.4 If the Council is minded to support the proposed foodstore development on the Bradford Road/Northgate site, it is important to note that it may be difficult to refuse planning permission for the proposed Tesco store on the Serpentine Road/Northgate site, despite the concern that the provision of two large foodstores would result in surplus floor space capacity in North Kirklees and potential impact on nearby town centres. Whilst the Council's earlier planning decision in respect of the Bradford Road/Northgate site was correct at the time, the absence of development has enabled progress to be made on bringing forward a foodstore proposal on a more central site (Serpentine Road/Northgate) which was considered by all parties at the Call-In Inquiry to be the best location to accommodate foodstore development.

4.5 Based primarily on the key tests outlined in PPS6, the Northgate/Serpentine Road site is sequentially preferable and will provide an element of diversity beyond the provision of a single foodstore. Whilst foodstore development of either site would meet the qualitative and quantitative need to recapture trade that is currently leaving the area and going to competing centres and facilities, the Northgate/Serpentine Road site and development proposed is more acceptable in terms of location, diversity and linkages.

Convenience Goods: Retail Impact 2010*							**Appendix 1**
	Huddersfield	WRC	Dewsbury	Batley	Heckmondwike	Cleckheaton	Mirfield
BD11	-	47,781	9,161	30,164	55,803	116,433	-
BD19	465,789	465,789	640,460	232,895	2,445,392	5,356,572	116,447
WE13	-	103,475	1,256,786	224,195	351,383	-	84,073
WE14	171,126	37,669	283,059	7,533	101,169	10,763	316,423
WE15	277,372	56,501	652,338	493,106	2,192,295	904,028	61,638
WE16	118,563	88,163	595,860	416,494	1,106,598	264,489	-
WE17	32,845	1,138,652	1,905,053	4,094,771	853,990	43,794	87,588
BD4	-	-	12,817	35,021	-	70,041	-
TOTAL	£1,065,695	£1,938,030	£5,355,534	£5,534,179 (£8,268,179)**	£7,107,630	£6,766,120	£666,169

	Turnover	**Trade Loss**
ASDA/ Morrisons	£68.052 million	£0.823 million
Morrisions Buttershaw	£27.429 million	£1.327 million
Tesco Buttershaw	£24.742 million	£0.500 million
ASDA Dudlyhill	£39.863 million	£2.17 million

* Derived by applying the average zonal impact to trade draw.

** Takes into account the enhanced impact on Batley town centre as a result of the construction of Batley Tesco Extra Store.

APPENDIX 2

Introduction

Town FOCUS Report on Cleckheaton And Liversedge	Report Produced 09/03/2007
District (LA):	Kirklees
County:	West Yorkshire

Cleckheaton is a Northern English town, south of Bradford, east of Brighouse and west of Batley. Road communications are good with the A606 and A58 providing access to the M4.

Demographic

	Urban Area	District	GB
Population			
Resident 2001	26,796.0	388,567	57,103,927
Resident 1991	27,157	373,127	54,888,844

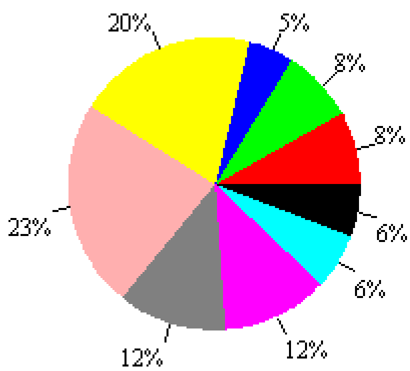
	Urban Area	District	GB
Households			
2001 Total	11,498.0	159,058	23,852,721
1991 Total	11,105	146,873	21,897,322

Population within 10km of Centre	578,968	(1994 estimate)
Population within 20km of Centre	1,703,605	(1994 estimate)

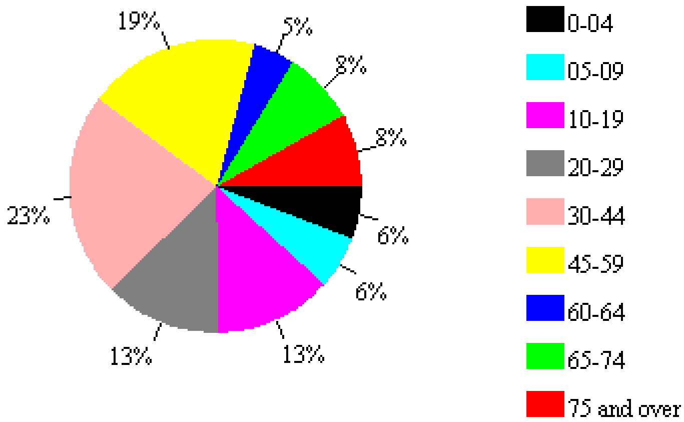
	Urban Area		District		GB	
	2001	**1991**	**2001**	**1991**	**2001**	**1991**
% Total Population Male	47.8	48.17	48.6	48.41	48.6	48.42
% Total Population Female	52.2	51.83	51.4	51.59	51.4	51.58

Note: Care must be taken when interpreting intercensal population change, as there have been changes in definition between 1991 and 2001, and the 2001 counts have been adjusted to account for under-enumeration.

UA 2001 Age Structure



GB 2001 Age Structure

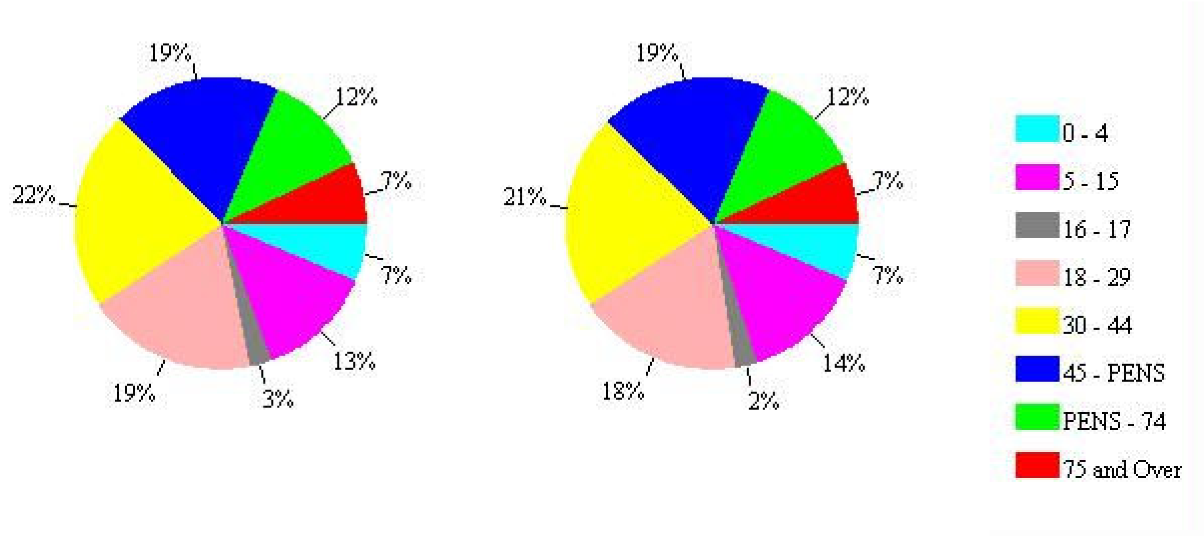


2001 Census Data - Population by Age

Age (%)	**Urban Area**	**District**	**GB**
0-04	6.3	6.6	5.9
05-09	6.3	6.8	6.3
10-19	12.3	13.5	12.8
20-29	11.8	12.6	12.6
30-44	22.6	22.2	22.6
45-59	20.3	19.1	19.0
60-64	4.8	4.6	4.9
65-74	7.8	7.7	8.4
75 and over	7.7	7.0	7.5
All Ages	26,796.0	388,567	57,103,927

GA 1991 Age Structure

GB 1991 Age Structure



Age Structure 1991 (%)	Urban Area	District	GB
0 - 4	6.5	7.0	6.6
5 - 15	13.0	14.3	13.5
16 - 17	2.6	2.7	2.5
18 - 29	18.8	18.4	18.2
30 - 44	22.0	21.3	21.2
45 - Pensionable age	18.5	18.7	19.3
Pension - 74	11.6	11.0	11.7
75 and Over	6.9	6.6	7.0

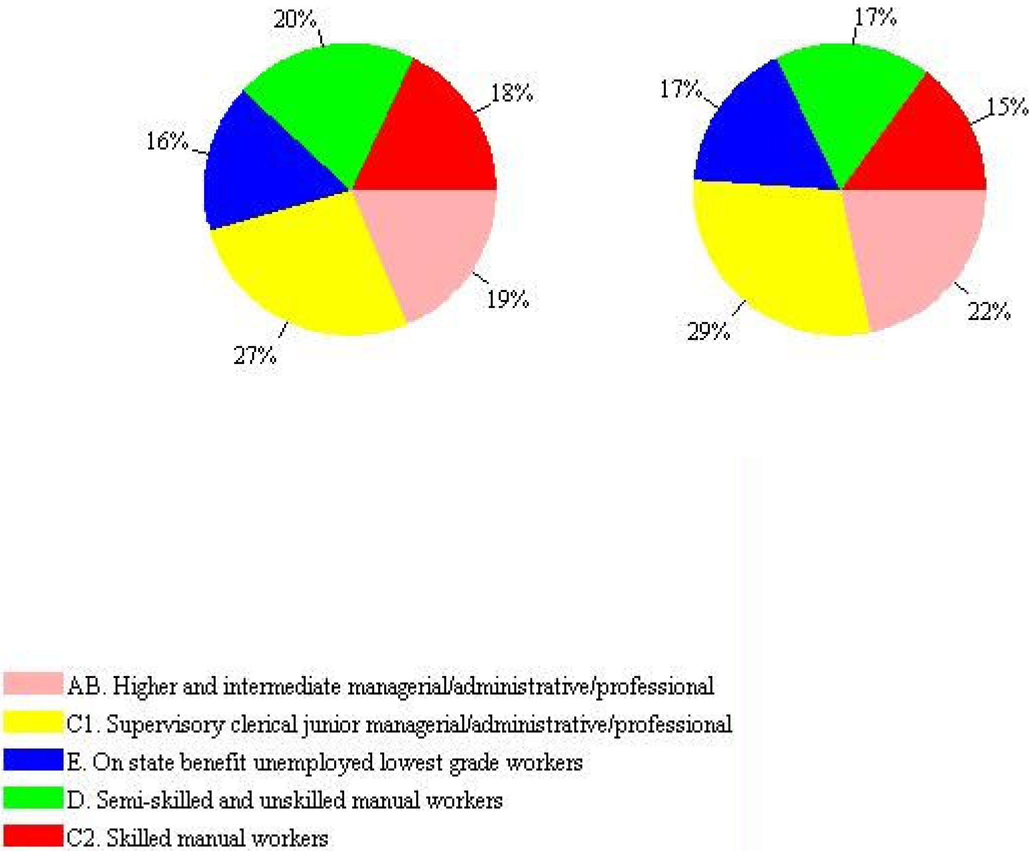
Socio-Economic

Mosaic Consumer Classifications	Urban Area	GB
Symbols of Success	1.23	10.53
Happy Families	22.75	11.46
Suburban Comfort	16.90	16.06
Ties of Community	29.38	16.33
Urban Intelligence	0.09	6.95
Welfare Borderline	2.19	5.29
Municipal Dependency	6.87	6.40
Blue Collar Enterprise	7.31	11.56
Twilight Subsistence	9.73	2.74
Grey Perspectives	3.48	6.71
Rural Isolation	0.00	5.64
Unclassified	0.07	0.34

Note: A brief definition of each consumer group can be found in the Notes section.

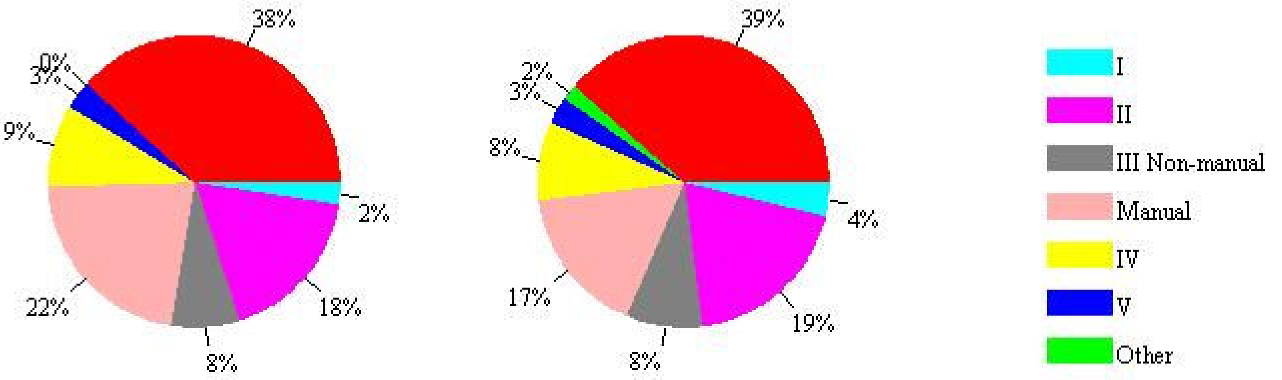
Source: Mosaic UK, Experian Ltd, Embankment House, Electric Avenue, Nottingham, NG80 1EH (Tel. 0115 968 5151)

Urban Area Class Groupings 2001 **GB Area Class Groupings 2001**



Class Groupings 2001 (%)	Urban Area	District	GB
AB. Higher and intermediate managerial/administrative/professional	18.7	20.10	21.70
C1. Supervisory clerical junior managerial/administrative/professional	27.1	27.20	29.40
E. On state benefit unemployed lowest grade workers	16.3	16.10	16.60
D. Semi-skilled and unskilled manual workers	20.0	20.40	17.20
C2. Skilled manual workers	18.0	16.10	15.10

Urban Area Class Groupings 1991 **GB Area Class Groupings 1991**



Class Groupings 1991 (%)	Urban Area	District	GB
I	2.4	3.4	4.1

II		17.4		17.9		18.9
III Non-manual		7.5		6.7		8.3
Manual		21.9		18.8		16.4
IV		9.1		9.3		8.4
V		2.9		3.2		2.9
Other		0.1		1.1		1.6
Econom. Inactive		38.1		38.3		38.3
Unclassified		0.6		1.3		1.1

Car Ownership (%)	**Urban Area**		**District**		**GB**	
	2001	**1991**	**2001**	**1991**	**2001**	**1991**
Households with no car (%)	27.8	34.8	29.6	37.1	27.5	33.4
1 Car	44.4	43.4	43.5	41.9	43.8	43.5
2 Cars +	22.7	21.9	22.1	21.0	23.1	23.1
3 Cars	3.8	N/a	3.7	N/a	4.4	N/a
4 Cars +	1.3	N/a	1.1	N/a	1.3	N/a
Cars per Household (no. of cars)	1.1	0.9	1.0	0.9	1.1	0.9

Household Tenure (%)	**Urban Area**		**District**		**GB**	
	2001	**1991**	**2001**	**1991**	**2001**	**1991**
Owner Occupier	70.9	70.5	70.7	70.5	68.3	66.4
Rented	18.5	18.8	17.3	19.6	19.9	21.4
Private Rented	6.8	5.5	9.1	6.9	9.6	7.1
Other Housing	3.8	5.2	2.9	3.0	2.2	5.1

Economy

Employment Profile(%)	**Urban Area**		**District**		**GB**	
Note: 16-74 for 2001, but 16-64 for 1991*	**2001**	**1991**	**2001**	**1991**	**2001**	**1991**
Male 16 - 74 Full Time * (active)	58.2	67.5	52.1	62.5	49.6	60.3
Male 16 - 74 Part Time * (active)	3.0	2.6	3.6	2.0	4.7	2.1
Male 16 - 74 Self Employed * (active)	10.8	12.8	11.4	12.2	11.3	13.1
Male 16 - 74 Unemployed (active)	3.9	N/a	4.4	N/a	4.2	N/a
Male 16 - 74 Full-time student(active)	2.1	N/a	2.6	N/a	2.5	N/a
Male 16 - 74 Retired (inactive)	11.2	N/a	10.9	N/a	12.1	N/a
Male 16 - 74 Student (inactive)	2.4	N/a	5.2	N/a	4.7	N/a
Male 16 - 74 Looking after home (inactive)	0.8	N/a	1.0	N/a	1.7	N/a
Male 16 - 74 Permanently disabled (inactive)	5.6	N/a	6.2	N/a	6.3	N/a
Male 16 - 74 Other (inactive)	2.1	N/a	2.7	N/a	2.9	N/a
Note: 16-74 for 2001, but 16-64 for 1991*	**2001**	**1991**	**2001**	**1991**	**2001**	**1991**
Female 16 - 74 Full Time * (active)	32.8	39.7	28.6	35.0	19.8	36.2
Female 16 - 74 Part Time * (active)	23.6	27.3	21.3	24.2	30.0	21.9
Female 16 - 74 Self Employed * (active)	4.0	4.3	3.9	3.9	4.3	4.0
Female 16 - 74 Unemployed (active)	2.0	N/a	2.4	N/a	2.5	N/a
Female 16 - 74 Full-time student(active)	2.2	N/a	2.9	N/a	2.8	N/a
Female 16 - 74 Retired (inactive)	16.1	N/a	15.2	N/a	15.5	N/a
Female 16 - 74 Student (inactive)	2.5	N/a	4.7	N/a	4.6	N/a
Female 16 - 74 Looking after home (inactive)	9.3	N/a	11.9	N/a	11.7	N/a
Female 16 - 74 Permanently disabled (inactive)	4.5	N/a	5.1	N/a	5.1	N/a
Female 16 - 74 Other (inactive)	3.0	N/a	4.0	N/a	3.6	N/a

Note: Data marked N/a = Not Available

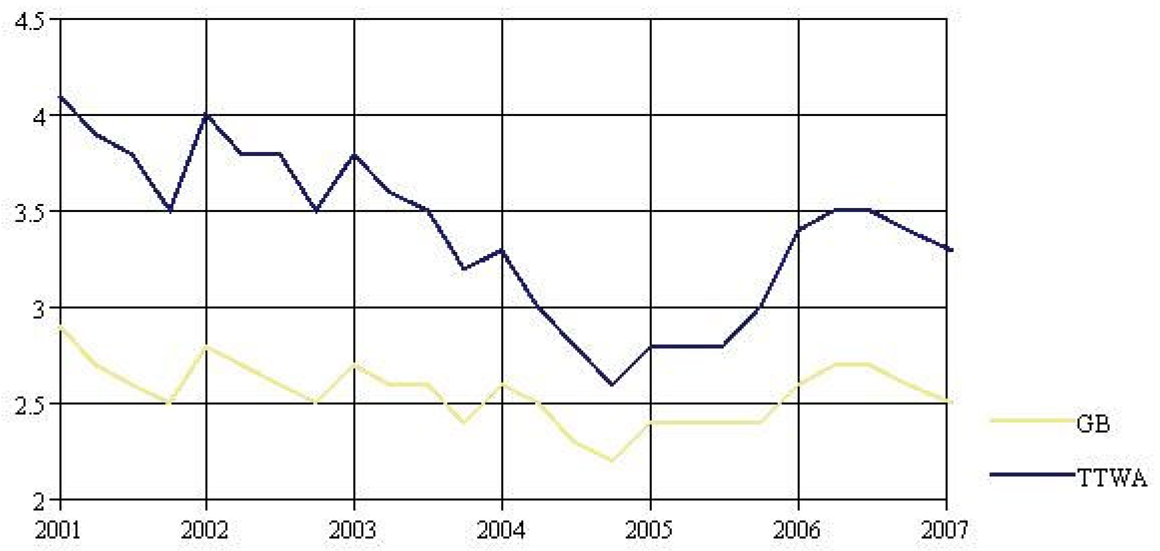
Claimant Count Unemployment Rate

Claimant Count Unemployment Rates (URs) are derived using the new residence-based proportions, which were introduced by ONS in January 2003. These express local area claimant count figures as a proportion of the resident working age population (females 16-59, males 16-64). The working age population figures are derived from the mid-year population estimates which are compatible with the 2001 Census. Previously URs were workplace based.

Claimant Count Unemployment Rates for London Boroughs supplied by GLA (excluding GB figure).

Claimant Count Unemployment Rates for all other towns currently covered and GB figures supplied by ONS.

Note: The Claimant Count Unemployment Rate measures the number of people claiming unemployment benefit



Claimant Count Unemployment Rate (%)	TTWA	GB
Jan-07	3.3	2.5
Oct-06	3.4	2.6
Jul-06	3.5	2.7
Apr-06	3.5	2.7
Jan-06	3.4	2.6
Oct-05	3.0	2.4
Jul-05	2.8	2.4
Apr-05	2.8	2.4
Jan-05	2.8	2.4
Oct-04	2.6	2.2
Jul-04	2.8	2.3
Apr-04	3.0	2.5
Jan-04	3.3	2.6
Oct-03	3.2	2.4
Jul-03	3.5	2.6
Apr-03	3.6	2.6
Jan-03	3.8	2.7
Oct-02	3.5	2.5
Jul-02	3.8	2.6
Apr-02	3.8	2.7
Jan-02	4.0	2.8
Oct-01	3.5	2.5
Jul-01	3.8	2.6
Apr-01	3.9	2.7
Jan-01	4.1	2.9

Employment by Sector	TTWA		District		GB	
	2001	1991	2001	1991	2001	1991
Main Sectors						
Manufacturing Industries	27.0	29.8	23.8	26.9	14.8	21.2
Primary Industries	0.9	1.5	0.9	2.6	1.9	3.3
Construction	6.4	3.5	6.4	4.6	6.8	4.5

Hotels & Catering (*)	4.1	*22.3	4.4	*21.4	4.8	*21.5
Transport & Communication	5.1	3.9	5.5	4.7	7.0	6.1
Banking, Finance & Business Services	14.1	9.1	13.2	10.6	17.5	12.1
Other Services	20.1	29.7	23.1	29.3	23.9	31.2
Utilities	0.6	N/a	0.7	N/a	0.8	N/a
Public Admin & Defence	3.8	N/a	4.3	N/a	5.8	N/a
Retail (*)	18.0	*11.3	17.8	*10.5	16.6	*10.7

Note I: Data marked N/a = Not Available

(*) Note II: % for 1991 not directly comparable

(*) Note III: for further explanation of non-comparable sectors, see Notes at end of Report

Main Employers

Company Name	Size/Staff Number	Activity
T M D Friction	500	Brake & Clutch Mfrs & Suppliers
Totty Construction Group Ltd	400	Builders
Flexitallic Ltd	300	Jointings & Gaskets
Westex Carpets Ltd	250	Carpet & Rug Mfrs
Lewis Investigation Services	200	Compensation Claims
Cdp Ltd	190	Wire Goods Mfrs
Jay-Be Ltd	150	Beds & Bedding
The In Touch Group Ltd	150	Designers-Advertising & Graphic
A F C Liversedge	130	Sports Clubs & Associations
Whitcliffe Mount School	120	Schools & Colleges
Cleckheaton Holdings Ltd	100	Holding Companies
Clemo Mg Rover	100	Car Dealers - New
Norwood Textiles	100	Curtains
Automatic Components Ltd	80	Engineers
Status International	80	Lighting Goods Wh'salers
Roche Health Care Ltd	75	Residential & Retirement Homes
Chartford Financial Management Ltd	70	Financial Advisers - Tied Agents
Clough & Co Llp	70	Accountants
Clough Management Services	70	Management & Business Consultants
Ferno Uk Ltd	70	Medical Supplies

Source: Experian (July 2006)

Note: This is a guide to the main employers, from information available - in some cases, no staff numbers are given. Where possible, a maximum of 20 employers are shown

Notes

Retail Demand - based on requirements for Cleckheaton only.

Travel To Work Area (TTWA) figures based on Bradford TTWA.

The main changes to Unemployment Rates.
The differences are mainly explained by the fact that the number of jobs in an area may be different from the resident population of working age as a result of:

1. Commuting patterns (which can work either way, the new proportions being higher than the old rates for some city areas, for example).

2. Different proportions of the resident population who are working or seeking work (ie differences in economic activity rates).

All 2001 Census data is provided by Experian UK Ltd which has been collected from the Office for National Statistics formerly

Office of Population Census and Survey (OPCS). All 1991 Census data provided by Office for National Statistics (ONS) formerly Office of Population Census and Survey (OPCS). Crown Copyright protected. Census values shown for 1991 English and Welsh Urban Areas based on Urban Area definitions supplied by the DoE.

Care must be taken when interpreting intercensal population change, as there have been changes in definition between 1991 and 2001, and the 2001 counts have been adjusted to account for under-enumeration.
This applies particulary to Resident Population and Male/Female Population figures.

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CACI Retail Shopper Populations data is supplied by CACI Limited (Head Office 0800 181 851). The Retail Shopper Population is a percentage of the estimated Retail Catchment Population (e.g. for major city centres on average over 31% of shoppers in the catchment are drawn to the centre). Figures are based on the Comparison Goods Model for products such as clothes, books and CDs, but not food.

Mosaic Consumer Classifications are provided by Experian, the leading supplier of consumer segmentation. This dataset provides a picture of UK consumers in terms of their socio-demographics, lifestyles, culture and behaviour and is updated annually.

The definitions of the Mosaic Consumer Classifications are as follows:

Symbols of Success	People with rewarding careers who live in sought after locations, affording luxuries and premium quality products.
Happy Families	Families with focus on careers and home, mostly younger age groups now raising children.
Suburban Comfort	Families who are successfully established in comfortable, mature homes. Children are growing up and finances are easier.
Ties of Community	People living in close-knit inner city and manufacturing town communities, responsible workers with unsophisticated tastes.
Urban Intelligence	Young, single and mostly well-educated, these people are cosmopolitan in tastes and liberal in attitudes.
Welfare Borderline	People who are struggling to achieve rewards and are mostly reliant on the council for accommodation and benefits.
Municipal Dependency	Families on lower incomes who often live in large council estates where there is little owner-occupation.
Blue Collar Enterprise	People who, though not well-educated, are practical and enterprising and may well have exercised their right to buy.
Twilight Subsistence	Elderly people subsisting on meagre incomes in council accommodation.
Grey Perspectives	Independent pensioners living in their own homes who are relatively active in their lifestyle.
Rural Isolation	People living in rural areas where country life has not been influenced by urban consumption patterns.

All data contained in the office rental report has been compiled by King Sturge LLP and is published for general information purposes only. Whilst every effort has been made to ensure the accuracy of the data and other material contained in this report, King Sturge LLP does not accept any liability (whether in contract, tort or otherwise) to any person for any loss or damage suffered as a result of any errors or omissions. The information, opinions and forecasts set out in the Report should not be relied upon to replace professional advice on specific matters and no responsibility for loss occasioned to any person acting, or refraining from acting, as a result of any material in this publication can be accepted by King Sturge LLP.

The Colliers CRE Retail Rents Map and Database is based upon the company's opinion of the open market Zone A rent in 609 shopping locations in the UK. The rental values relate to a hypothetical shop unit of optimum size and configuration in the prime pitch. The figures have been arrived at by adopting zone sizes standard for the location and are expressed as £ per square foot per annum. In the case of shopping centre locations where the rent payable is the greater of a base Rent (a percentage of Full Rental Value (typically 80%) or a percentage of turnover, the rental contained in the Rents Map and Database is Full Rental Value (ie. the grossed up Base Rent). In assessing it's opinion of the open market Zone A rent Colliers CRE only acknowledge the presence of shopping centres once completed and open to the public.

Neither the whole or any part of the Colliers CRE Rents Map and Database, or any reference thereto, may be included in any published document, circular or statement or disclosed in any way without the company's written consent to the form and context in which it may appear. The Rents Map and Database gives information which may be helpful in identifying trends in the retail property market. However, no warranty is given as to the accuracy of, and no liability is accepted in relation to, the figures contained in it and they must not relied upon for investment or any other purposes. The Rents Map and Database does not constitute and must not be treated as investment, rent review, lease renewal or valuation advice.

Colliers CRE is the principal business of Colliers CRE plc, and an independent affiliate of the worldwide Colliers International network.
Colliers CRE plc is quoted on the Alternative Investment Market of the London Stock Exchange.

Employment Sector variations between 2001 & 1991.
Hotels & Catering refers to 2001 but in 1991 it was Distribution, Hotels & Catering.
Transport Storage & Communications refers to 2001, but in 1991 it was just Transport & Communication.
Retail in 2001 includes Wholesale & Retail Trade and Repair of Motor Vehicles, whereas in 1991 it was Retail Distribution.

All Local & Structure Plan data is provided by Fusion Online Ltd which has been collected through regular contact with UK planning authorities.

The various stages of the planning process are assigned a status, these are;

Adopted: The document has been adopted by the council and is the referrable document for planning purposes.

Approved: This is basically the same as the ADOPTED status, however we allocate an 'approved' status to documents that are reviewed each year. For example Local Development Schemes.

Under Preparation: The document is being worked on and is somewhere within the formal development plan process.

Preparation Planned: Work on the document has not yet began but is planned for the future.

Pre-Preparation: The council are carrying out informal evidence based work on the document.

On Hold: The document has been placed on hold.

Abandoned: The document has abandoned by the council.

Archive: This is normally used to house documents in excess of 10 years old on the system. However this status is currently not use

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