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DEWSBURY TOWN CENTRE AUDIT 2001

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 2001 Town Centre Audit for Dewsbury (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 2001 revealed that Dewsbury town centre provides 40,360 sq.m. (434,300 sq.ft.) of net retail floorspace, with 69.2% of this given over to comparison goods trading. This represents a slight decrease on the 1999 Audit figure of 70.5%. Within the primary shopping area the proportion of retail floorspace devoted to comparison goods trading remains the same at 85%.

Retail floorspace (net '000 sq.m.)

	1997	1999	2001
Convenience	10.36 (25.1%)	7.31 (18.2%)	7.35 (18.2%)
Comparison*	25.69 (62.3%)	28.34 (70.5%)	27.94 (69.2%)
Vacant	5.17 (12.6%)	4.56 (11.3%)	5.08 (12.6%)
Total	**41.22 (100%)**	**40.21 (100%)**	**40.36 (100%)**

*Comparison floorspace figure also includes A1 uses such as travel agents, optician's etc.

Number of shop units

	1997	1999	2001
Convenience	25 (6.8%)	23 (6.3%)	23 (6.6%)
Comparison	184 (50%)	185 (50.8%)	185 (52.7%)
Service	77 (20.8%)	82 (22.5%)	78 (22.2%)
Vacant	83 (22.4%)	74 (20.3%)	65 (18.5%)
Total	**369 (100%)**	**364 (100%)**	**351 (100%)**

The total amount of retail floorspace in the town has changed little over the last 2 years. However, the next 6 months will see the construction of a new Wilkinsons hardware/ housewares store on Crackenedge Lane, and the construction of an Asda foodstore on Mill Street West linked to the town centre by a pedestrian footbridge over the River Calder. Conversely, there is a growing interest from a number of service and leisure uses in properties in secondary shopping frontages. This is likely to see a gradual decline in the level of retail floorspace in these locations.

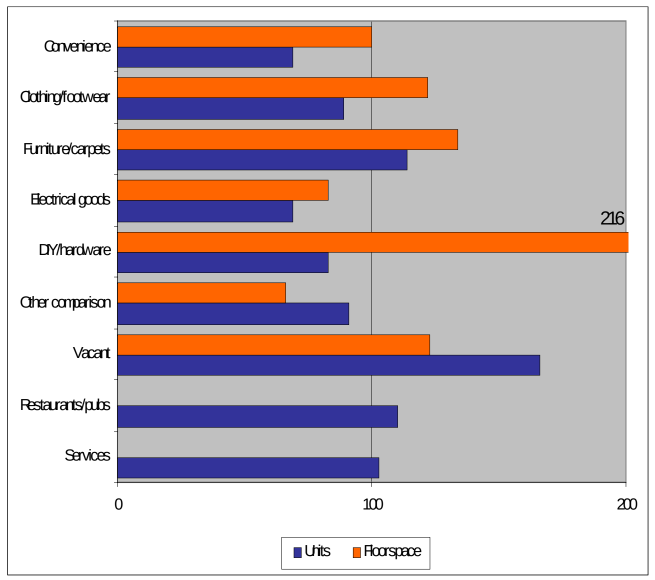
The proportion of retail floorspace given over to convenience goods has remained the same over the last 2 years, at 18.2%. This is significantly down on the 1997 figure of 25.1%, and is largely due to the closure of the Pioneer foodstore early in 1998.

The increase in floorspace vacancy (+11% since 1999) is largely attributable to the closure of two furniture stores in Spinkwell Mill on Halifax Road. Shop unit vacancy on the other hand, has declined over the same period (-12%), although it is still some 66% **above** the national average.

Vacancy rates within the primary shopping area are low (5.7% in terms of units and 7.1% in terms of floorspace). By comparison, a number of the secondary and peripheral shopping frontages in Dewsbury town centre (Daisy Hill, Wellington Road, Nelson Street, Union Street and Pioneer House on Northgate) record high vacancy rates. It is in these locations that long-term vacancy (more than 12 months) is particularly evident.

There have been a number of changes to the town's retail mix over the last 2 years. The closure of Focus Do It All, and its replacement by Matalan has resulted in an increase in the proportion of retail floorspace devoted to clothing in the town, and a corresponding reduction in DIY/hardware retail floorspace. Nevertheless, the existence of B&Q and Wickes on the retail warehouse park still means that the proportion of retail floorspace devoted to DIY/hardware in the town is more than 100% above the national average. Furthermore, the closure of 2 retail stores in Spinkwell Mill has led to a reduction in the proportion of floorspace given over to the sale of furniture.

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



There has been a steady increase recorded in service use occupancy within the town centre over the last 13 years. In 1988, service uses accounted for 18.7% of shop units. By 2001, this had increased to 22.2%. The introduction of diversity through a varied range and quality of service uses can be particularly beneficial to a town centre, provided that its retail function is not adversely affected by an over representation of such uses. This is not an issue in Dewsbury, which continues to maintain a strong shopping core.

Shops within the town centre (excluding the retail warehouse park and the Safeway foodstore on Halifax Road) are typically small in scale, averaging 68 sq.m. (730 sq.ft.) net in size. Larger unit accommodation can be found within the primary shopping area where shops average 102 sq.m. (1,100 sq.ft.) net in size. In secondary shopping frontages, average unit size drops to just 56 sq.m. (600 sq.ft.).

Dewsbury has the least amount of floorspace devoted to convenience retailing, although this is likely to change in the coming months when the new Asda foodstore is built. Whilst Dewsbury exhibits a similar floorspace vacancy rate to that of Batley, its shop unit vacancy rate is the highest of all the towns used in the comparative analysis.

Floorspace comparisons ('000 sq.m.)

	Dewsbury	Huddersfield	Batley	Heck'wike	Cleckheaton
Convenience	7.35 (18.2%)	16.49 (21.6%)	4.72 (20.3%)	5.07 (43.1%)	1.71 (21.9)
Comparison*	27.92 (69.2%)	51.17 (67.2%)	15.65 (67.3%)	5.21 (44.4%)	5.59 (71.7%)
Vacant	4.88 (12.2%)	8.51 (11.2%)	2.88 (12.4%)	1.47 (12.5%)	0.5 (6.4%)
Total retail floorspace	**40.15 (100%)**	**76.17 (100%)**	**23.25 (100%)**	**11.75 (100%)**	**7.8 (100%)**
Vacant units	61 (17.6 %)	86 (12.4%)	24 (11.5%)	26 (15.9%)	13 (7.6%)
Total number of units	**346 (100%)**	**695 (100%)**	**209 (100%)**	**164 (100%)**	**172 (100%)**

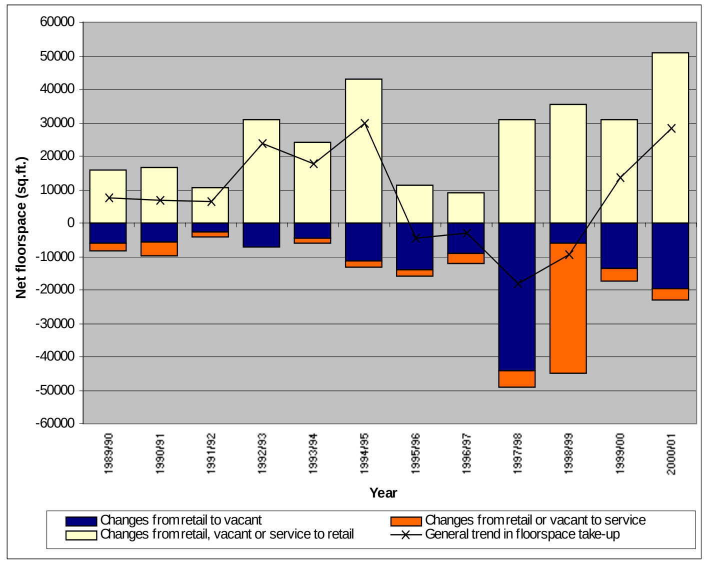
*Comparison floorspace figure also includes A1 uses such as travel agents, optician's etc.

Take up of retail floorspace

Since the 1999 town centre audit, there has been an increase in the take up of retail floorspace in Dewsbury. Just over the last 12 months, some 4,750 sq.m. of retail floorspace changed hands. The increase in take up is largely attributable to the opening of new stores on the retail park. These include for example, Matalan and Pets At Home. The opening of a new store to the rear of Pioneer House has also created further retail floorspace with the take up of vacant offices by Heritage Mills carpet retailer.

The graph quantifies the take up of retail floorspace since 1989, distinguishing between retail occupancy, service use occupancy and vacancy. It can be seen that for the first time since 1995, a positive take up has been recorded whereby either vacancy or changes out of retailing have not dominated the pattern of retailer movement. In 1998/99, the high level of retailer activity was masked by the use of previously vacant retail floorspace for a new library complex and Mecca Bingo Hall. Consequently, service use occupancy dominated this period. However, over the last 2 years, the opening of Netto, Matalan and other large stores on the retail park, has significantly increased the amount of retail floorspace taken up.

The pattern of floorspace take-up since 1989/90

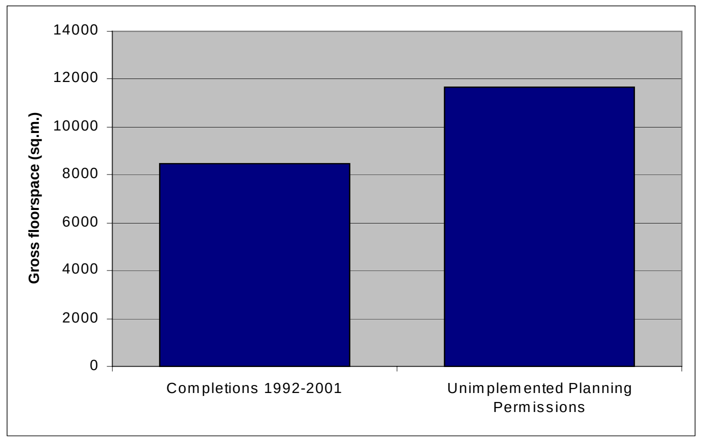


Since 1997, national multiples have continued to account for a large proportion of retail take up. Little national multiple movement was evident between 1995 and 1997. Local and regional traders dominated retailer activity during this period, with demands for smaller unit accommodation. However, since 1997, national multiples have accounted for a larger proportion of retail floorspace take up (51% in 1997/98, 59% in 1998/99, 48% in 1999/00 and in 66% in 2000/01). In contrast, the actual take up of shop units by national multiples over the last 2 years was less than 23%.

Retail development pipeline

The graph below identifies the retail development pipeline within and adjoining Dewsbury town centre. Since 1992, a total of 8,465 sq.m. (91,000 sq.ft.) gross of retail development has been completed in the Audit Study Area. The bulk of this has been the construction of units on the retail warehouse park.

Retail development pipeline



There remain 4 unimplemented planning permissions, although 2 of have recently seen the start of construction work. These are:

Mill Street West. The construction of an Asda foodstore (6,970 sq.m.) with a footbridge link over the River Calder to the bus station. Work has already started and completion is anticipated during May 2002.

Crackenedge Lane. The construction of a Wilkinsons hardware/ housewares store (2,138 sq.m.). Work has started on site.
Victoria Centre, Wellington Road. The proposed construction of a discount foodstore (1,162 sq.m.) is unlikely to be implemented as the prospective purchasers have now withdrawn.

Aldams Road. Planning permission has been granted for 1,394 sq.m. gross retail unit on the site of a former car showroom. The site has been cleared, but no construction work has started.

The assessment of development does not include changes of use and refurbishment works to existing units within the town centre.

Markets

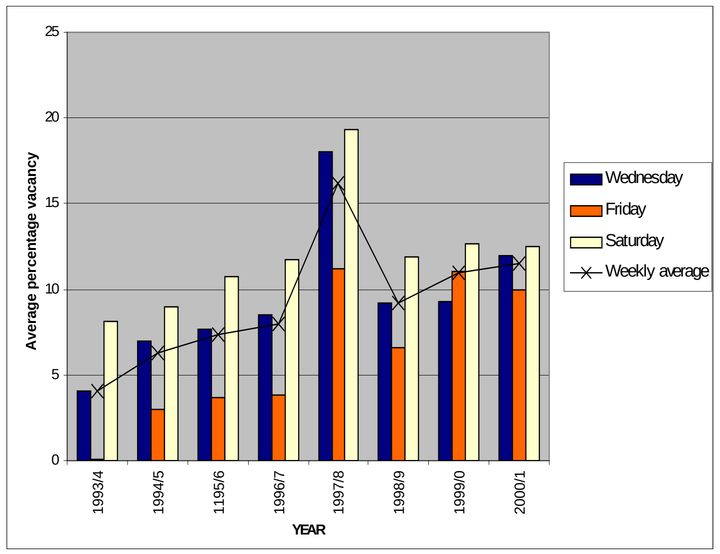
Dewsbury offers both open and covered markets. These are located to the north east of the town and linked directly to the principal retail axis. Whilst the covered market trades six days a week, the open market trades on a Wednesday, Friday and Saturday. Together, the markets provide some 370 stalls.

Market refurbishment works were undertaken in late 1997 (partly funded through European monies). However, the improvement programme disrupted market trading which, in turn, adversely affected pedestrian footfall. Pedestrian counts undertaken at the time revealed a decline of over 21% in the number of people in Dewsbury town centre on a market day. Nevertheless, visitor/shopper numbers have substantially recovered following completion of the works in 1998.

The open market continues to be a very popular shopping venue, drawing in people from the wider West Yorkshire area. The strength of the market as a 'shopping attraction' is reflected in the pattern of footfall recorded in the town (see 'Pedestrian footfall Fact Sheet No. 1').

Vacancy rates have shown a slight increase since the 1999 Audit although this increase is not significant. The graph illustrates the trends in market vacancy and also shows the rates associated with each of the 3 weekly trading days.

Open market vacancy rates



Stall occupancy in the open market averaged a significant 88.5% throughout 2000/01. However, this still represents a decline when compared with previous years. Despite a decline in vacancy rates recorded for the Saturday and Friday markets, the open market registered an increase in vacancy overall for the year. This is due to the significant increase in vacancy recorded for the Wednesday market.

National multiple traders

Dewsbury's principal retail axis is defined by Princess of Wales Precinct, Long Causeway, Market Place and Lower Foundry Street, with Princess of Wales Precinct representing the prime retail pitch. As acknowledged in the 1999 Town Centre Audit, the axis provides an attractive shopping environment, which is pedestrianised along its entire length. It has strong pedestrian flows and a good representation of national multiple retailers.

Some 58% of shop units within the principal retail access are occupied by national multiple retailers, although representation in both Market Place and Lower Foundry Street continues to be weaker (52.6% and 28.6%, respectively). This is primarily because shop units in these 2 locations are generally small in scale, lacking the necessary depth to satisfy the requirements of many national mulitple companies.

Notwithstanding the above, the general shopping area of the town is quite extensive. The 1999 floorspace occupancy survey showed that a large proportion of the town centre is given over to secondary and largely independent retailing – a pattern which can still be seen in the 2001 audit exercise. However, national multiple representation for the town as a whole has increased over the past 2 years to 27.9%. This increase is primarily due to the influx of Matalan, Blockbuster, Greggs, Carphone Warehouse and What Everyone Wants.


Marks and Spencer

Quality retailers in the town include such names as Marks and Spencer, Mothercare, Boots, Dorothy Perkins, W H Smith, Argos, Superdrug and Woolworths, all located within the principal retail axis. Furthermore, most of the units on the Railway Street retail warehouse park adjoining the town centre are occupied by national multiple companies. However, there continues to be a poor representation of national fashion retailers (both men and women), no department store and a weak range and number of specialist or 'niche' retailers.

The growth in the number of charity shops in the town centre, noted in the 1999 audit, has continued. There are now 10 charity shops in the centre compared to 8 in 1999. These are generally concentrated in secondary and peripheral shopping locations. However, there has been a steady increase in the number taking units along the principal retail axis. For example, there are 4 located on Lower Foundry Street. This inevitably raises the issue of the "quality" of the town's comparison goods retail offer.