



CLECKHEATON TOWN CENTRE ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS SEPTEMBER 2005

INTRODUCTION

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

The first full audit for Cleckheaton town centre was published in August 1997. Changes that have taken place over the last 8 years have been examined in annual statements of key economic indicators, of which this is the eighth. The indicators of vitality and viability covered in this document are:

- Shop unit and floorspace occupancy
- Retail development in the pipeline
- Vacancy rates
- Retailer demand
- Pedestrian footfall
- Prime retail rents

FLOORSPACE, SHOP UNITS AND VACANCY

A survey of occupancy updated in June 2005 recorded that Cleckheaton town centre provides a total of 8,271sq.m. (88,996sq.ft.) of net retail floorspace and 165 shop or service units. Figure 1 illustrates the pattern of shop unit and floorspace occupancy for 2005 compared to 2004, with percentage changes over 12 months.

Figure 1: Cleckheaton floorspace/shop unit statistics

	2004		2005		% change 2004-2005	
	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units
Convenience (food)	1,583 (18.6%)	15 (8.8%)	1,950 (23.5%)	16 (9.7%)	+23.2	+6.7
Comparison (non-food)	5,403 (63.6%)	87 (50.9%)	5,580 (67.5%)	94 (57.0%)	+3.3	+8.0
Service	N/A	46 (26.9%)	N/A	43 (26.0%)	N/A	-6.5
Vacant	1,509 (17.8%)	23 (13.4%)	741 (9.0%)	12 (7.3%)	-50.9	-47.8
TOTAL	8,495 (100%)	171 (100%)	8,271 (100%)	165 (100%)	-2.6	-3.5

There are two noticeable changes to the nature of occupancy in Cleckheaton town centre that have occurred during the last 12 months – firstly the significant drop in vacancy (both in terms of floorspace and number of units) and secondly the increase in convenience goods

floorspace provision. Much of this change is a result of the demolition of vacant units at the bus station to make way for a new transport interchange building incorporating a convenience based store selling newspapers, confectionery and snacks etc. Other retailer activity around the town centre has contributed to the decline in vacancy as units have become occupied by new tenants.

The increase in vacancy recorded in the 2004 assessment has now been reversed and the town centre has returned to having levels of vacancy that are below the national average in terms of both floorspace quantity and number of units. There remains very little evidence of long term

vacancy and the number of premises transactions in the town suggests a relatively healthy economy.

There has been a drop in the total number of shop units within the centre since the 2004 assessment. This is largely accounted for by conversions to residential and the amalgamation of some shops to form larger, more suitable units.

Figure 2: Comparisons¹ with nearby towns (sq.m. net)

	Cleckheaton	Batley	Heck'wike	Dewsbury	Holmfirth
Convenience	1,950 (23.5%)	6,094 (25.4%)	4,776 (42.0%)	10,011 (22.8%)	1,687 (26.5%)
Comparison	5,580 (67.5%)	16,123 (67.2%)	5,091 (44.8%)	30,836 (70.3%)	3,954 (62.1%)
Vacant	741 (9.0%)	1,790 (7.4%)	1,508 (13.2%)	3,044 (6.9%)	727 (11.4%)
Total retail floorspace	8,271 (100%)	24,007 (100%)	11,375 (100%)	43,891 (100%)	6,368 (100%)
Vacant units	12 (7.3%)	13 (6.5%)	35 (21.8%)	52 (15.3%)	9 (5.9%)
Total no. of units	165 (100%)	200 (100%)	160 (100%)	340 (100%)	152 (100%)

Figure 2 illustrates the make-up of Cleckheaton in comparison to other nearby towns. This shows that despite the recent decrease in vacancy rates, both Batley and Holmfirth record a lower unit vacancy rate than Cleckheaton. The pattern of occupancy split between convenience goods (food) and comparison goods (non-food) retailing is fairly consistent across all of the towns with the exception of Heckmondwike where the Morrisons store dominates the convenience goods provision.

The new Cleckheaton bus station



PEDESTRIAN FOOTFALL

Since 1997, pedestrian footfall counts have been undertaken annually in Cleckheaton town centre to measure the volume and pattern of visitor/shopper movement. These assessments cover 7 locations including all access points into the town centre, the entrance to Tesco and the pedestrian link from the foodstore to Northgate. Morning and afternoon hour-sample surveys are undertaken on two weekdays (market day and non-market day) and a Saturday. Figure 3 gives the summer 2005 pedestrian count results and the changes recorded since the last assessment.

The principal changes that have been observed in comparison to the previous assessment are the increase in numbers of pedestrians on the Saturday counts. The Saturday 2005 survey was affected by the Family Fun Day and official opening of the refurbished market arcade. This

¹ Figures relate to the floorspace contained within the Town Centre Audit Study Boundary of each centre at the most recent published survey date.

generated considerable extra footfall which contributed to the overall increase in Cleckheaton's pedestrian activity of 14.2%. However, this does mask the drop in numbers recorded during the weekday assessments where declines ranged from 2.4% to 12.6%. In real terms, this actually amounts to relatively small numbers of people – for example, the 7.9% drop recorded on non-market day afternoon was due to a decrease of only 82 people compared to the previous year. The pattern of pedestrian volumes will continue to be monitored.

Figure 3: Cleckheaton pedestrian numbers 2004-05²

		2004	2005	% change
Market day	a.m.	1504	1315	-12.6
	p.m.	1074	1048	-2.4
Non-market day	a.m.	1277	1217	-4.7
	p.m.	1043	961	-7.9
Saturday	a.m.	1658	2349	+41.7
	p.m.	861	1578	+83.3
TOTAL (into town only)		7417	8468	+14.2

Figure 4 shows the levels of footfall recorded on an annual basis since 1997. It can be seen that the numbers of pedestrians visiting the town has remained relatively static over the last 8 years. The sharp increase in Saturday numbers for 2002 was due to the influence of an England World Cup football match, which was played on the day of the assessment. This is followed by another sharp increase recorded in this year's Saturday survey due to the Family Fun Day held in the town centre.

Figure 4: The pattern of footfall 1997 – 2005

The distribution of pedestrians around the town centre during the assessment is illustrated in Figure 5. On a street by street basis, weekday visitors to the town tend to be highest in numbers along Cheapside and the southern end of Northgate, with relatively high numbers using Central Arcade. The Tesco store main entrance is also well used throughout the week.

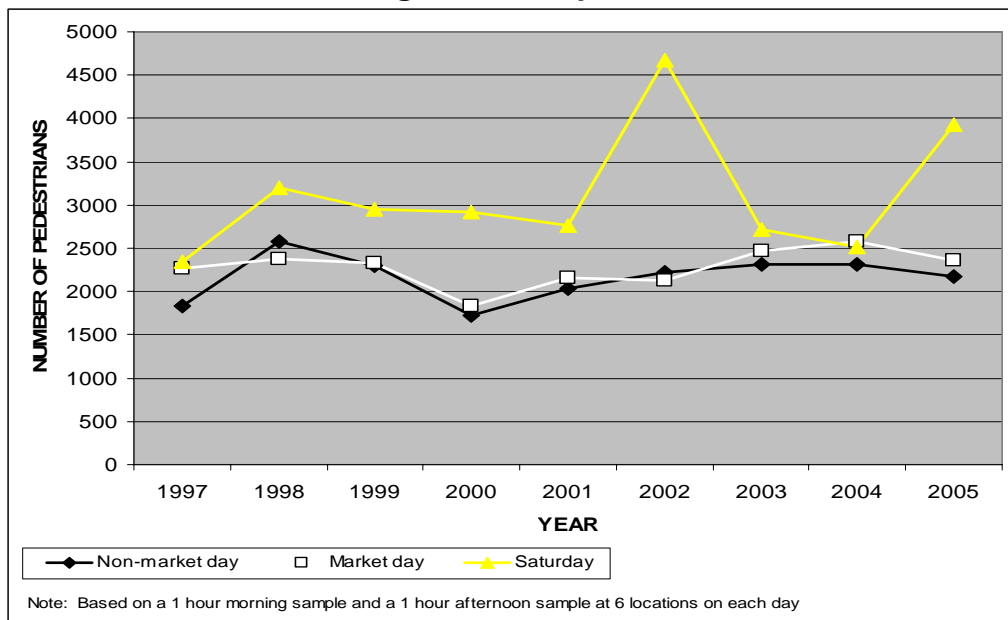


Figure 5: Pedestrian numbers by street³ (June 2005)

Survey location	Date		Thurs 23 rd		Sat 25 th	
	Tues 21 st		Non-market		Overcast	
	a.m	p.m	a.m	p.m	a.m	p.m
1. Tesco main ent.	271	223	287	287	379	260
2. Pedestrian link	115	59	86	88	85	53
3. Cheapside	264	167	229	159	275	195
4. Northgate (N)	97	108	91	74	259	180
5. Albion Street	132	151	246	157	552	413
6. Northgate (S)	326	228	194	155	482	370
7. Central Arcade	225	171	170	129	402	160
TOTAL (into town)	1315	1048	1217	961	2349	1578

The re-furbished Market Arcade



² Morning counts were conducted for 1 hour between 10:30 and 11:30. Afternoon counts were conducted for 1 hour between 2:30 and 3:30. Totals represent the number of people entering the town and exclude the pedestrian link count point.

³ All count points record pedestrians coming INTO the town only and therefore the total excludes the pedestrian link walkway

DEVELOPMENT IN THE PIPELINE

During the last 12 months there has been some considerable development activity within Cleckheaton town centre. This includes the redevelopment of the bus station (off Dewsbury Road), the refurbishment of the covered market on Albion Street, and commencement of construction work to build a new NHS Health Centre on Greenside. Other small scale retail developments have also been started – notably the construction of two new units on Dewsbury Road near the junction of St Peg Lane. The proposed 5,650sq.m. ASDA foodstore on the site at Bradford Road/Horncastle Street still has a valid planning permission but has yet to be implemented. Outline permission exists for residential development on the former Savoy Cinema site which is currently landscaped and laid out as a public square.

Construction work on Greenside



A joint scheme costing £210,000 to provide CCTV camera coverage in both Cleckheaton and Heckmondwike became operational in April 2005. This scheme provides 8 cameras in Cleckheaton town centre.

The Council, alongside local groups, is endeavouring to examine potential improvements to attract more retailers to the town centre through a Local Public Service Agreement (LPSA) – a 3 year programme of environmental and economic initiatives aimed at improving the health and vibrancy of the town centre.

RETAILER DEMAND

An assessment of retailer demand was undertaken in September 2005. This revealed that 3 retailers currently have a requirement for representation in Cleckheaton. One of these is for a comparison goods retailer with a unit need of 280sq.m (3000sq.ft.) maximum. Two foodstore operators also have an interest in trading from the town. Further demand may exist from companies who have not formally registered their interest. None of last year's registered requirements have been accommodated in the town.

Bradford Road and the Savoy Site



PRIME RETAIL RENTAL LEVELS

The lack of a prime retail 'pitch' within the town centre of Cleckheaton creates difficulties in defining prime zone A rents for the town. Information received indicates that retail rents in Cleckheaton have not changed since the last publication and remain within the general range of £108 - £215 per sq.m. (£10-20 per sq.ft.).



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