

CLECKHEATON TOWN CENTRE ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS OCTOBER 2007

INTRODUCTION

The health and vitality of shopping centres in the Kirklees District is monitored on an annual basis through the Town Centre Audit Programme undertaken by the Council's Planning Service. Performance data is collected and analysed to allow the role of individual town centres to be assessed and to identify scope for change, renewal and diversification.

Since 1997, the performance of Cleckheaton town centre has been measured against a series of key economic indicators and reported in annual publications. In this 2007 edition, the following indicators of vitality and viability are assessed:

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

This year, the document also gives an assessment of the usage levels of shoppers' car parks.

FLOORSPACE, SHOP UNITS AND VACANCY

The annual survey of shop unit occupancy was undertaken in June 2007. Within the Cleckheaton Town Centre study boundary (see map on last page) there is approximately 8,200sq.m. of net retail floorspace. Of this, around 62% is occupied by comparison (non-food) goods with a further 23% of floorspace accommodating convenience goods (food) sales. In terms of shop units, there are a total of 95 currently in retail use with a further 50 occupied by services and 20 that were vacant at the time of the survey.

Figure 1: Cleckheaton floorspace and shop unit statistics

	2006		2007		% change 2006-2007	
	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units
Convenience (food)	1,924 (23.6%)	15 (9.1%)	1,927 (23.4%)	15 (9.1%)	+0.2	0
Comparison (non-food)	5,069 (62.2%)	85 (51.9%)	5,085 (61.9%)	80 (48.5%)	+0.3	-5.9
Service	N/A	46 (28.0%)	N/A	50 (30.3%)	N/A	+8.7
Vacant	1,084 (13.3%)	16 (9.8%)	1,211 (14.7%)	20 (12.1%)	+11.7	+25.0
Under refurbishment	73 (0.9%)	2 (1.2%)	0 (0%)	0 (0%)	N/A	N/A
TOTAL	8,150 (100%)	164 (100%)	8,223 (100%)	165 (100%)	+0.9	+0.6

A breakdown of the categories of use across Cleckheaton shop units is given in Figure 1. One of the main changes from 2006 is the growth in vacancy which has seen a 25% increase in the number of units and almost 12% in terms of floorspace. Some of the vacancy in the town is grouped around the Serpentine Road /Northgate area to

the north of Horncastle Street. This area has been the subject of land acquisition activity related to the existing planning permission for a supermarket. Despite increases this year, the vacancy rate remains below that recorded in 2004. Also of significance is the 8.7% increase in service use

occupancy which adds to the overall trend in service use growth over the last 8 years – recording a total growth of 11.1%. In line with this change, there has been an almost 6% loss of comparison goods retail units in the town.

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

Figure 2 illustrates the make-up of other town centres in the Kirklees District. In terms of proportions, Cleckheaton has a similar pattern of uses to Holmfirth. However, the town also has the highest floorspace vacancy rate of all the towns listed in Figure 2. This year, Cleckheaton is the only town not recording some commercial refurbishment activity. Heckmondwike shows the highest percentage of convenience goods provision; and unit vacancy rates are lowest in Batley and Holmfirth. Dewsbury exhibits the lowest proportion of convenience goods retailing – mainly due to its larger overall size.

	Cleckheaton	Batley	Heck'wike	Dewsbury	Holmfirth
Convenience	1,927 (23.4%)	7,420 (25.9%)	4,914 (44.2%)	9,923 (20.4%)	1,509 (23.5%)
Comparison	5,085 (61.9%)	19,692 (68.8%)	4,543 (40.8%)	33,220 (68.1%)	3,991 (62.1%)
Vacant	1,211 (14.7%)	1,441 (5.0%)	1,549 (13.9%)	5,520 (11.3%)	343 (5.3%)
Under refurbishment	0 (0%)	76 (0.3%)	118 (1.1%)	94 (0.2%)	582 (9.1%)
Total retail floorspace	8,223 (100%)	28,629 (100%)	11,124 (100%)	48,757 (100%)	6,425 (100%)
Vacant units	20 (12.1%)	20 (9.6%)	36 (23.7%)	49 (14.2%)	10 (6.6%)
Units under refurbishment	0 (0%)	1 (0.5%)	1 (0.7%)	3 (0.9%)	4 (2.6%)
Total no. of units	165 (100%)	209 (100%)	152 (100%)	344 (100%)	152 (100%)

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 (see map on last page). 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 2007 pedestrian count results and the changes recorded since the last assessment.

Figure 3: Cleckheaton pedestrian numbers 2006-07²

		2006	2007	% change
Market day	a.m.	1191	1518	+27.5
	p.m.	955	1155	+20.9
Non-market day	a.m.	1262	1318	+4.4
	p.m.	1092	1171	+7.2
Saturday	a.m.	2129	2179	+2.3
	p.m.	1434	1550	+8.1
TOTAL (into town only)		8063	8891	+10.3

Retailers in Cleckheaton

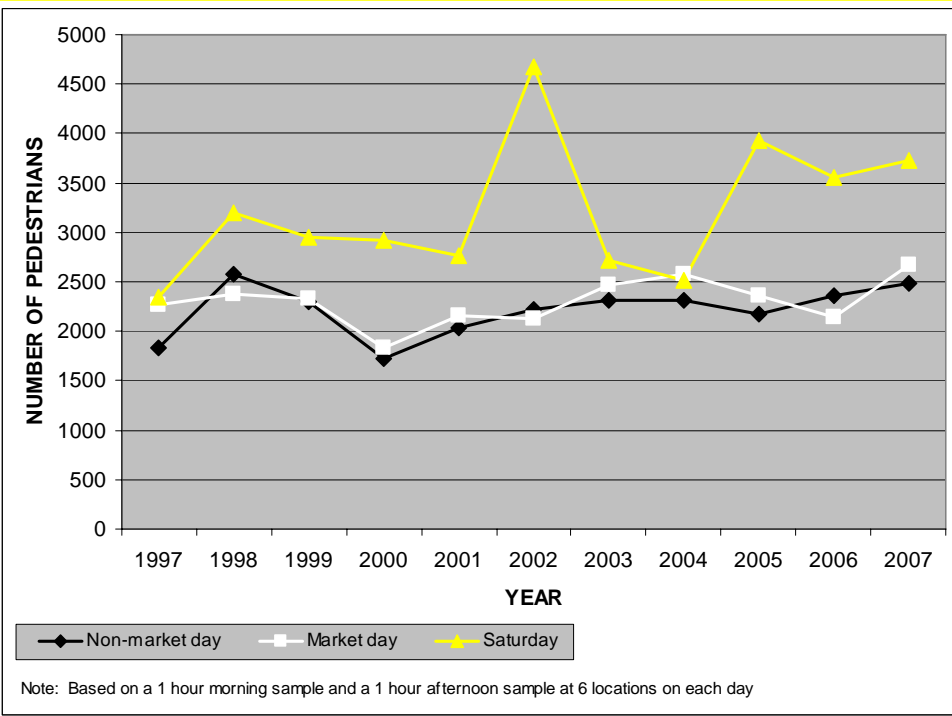


Footfall levels recorded for all morning and afternoon assessments across the three days were higher than last year. On market day, there was an increase of 27.5% in the morning and 20.9% in the afternoon. Overall, the town has seen an increase of over 10% in the number of recorded visitors compared to 2006. This takes the overall level of footfall to its highest level since 1997 (with the exception of 2002 which was skewed by extra visitors to the town during an England football world cup match). The pattern of footfall can be seen clearly in Figure 4.

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

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 exclude the pedestrian link count point as this represents a circulation route rather than an access point.

Figure 4: The pattern of footfall 1997 – 2007



The pattern of pedestrian numbers over time does illustrate an upward trend in the volume of Saturday visitors - this has also become quite distinctly higher than the weekday visitor numbers during the last few years.

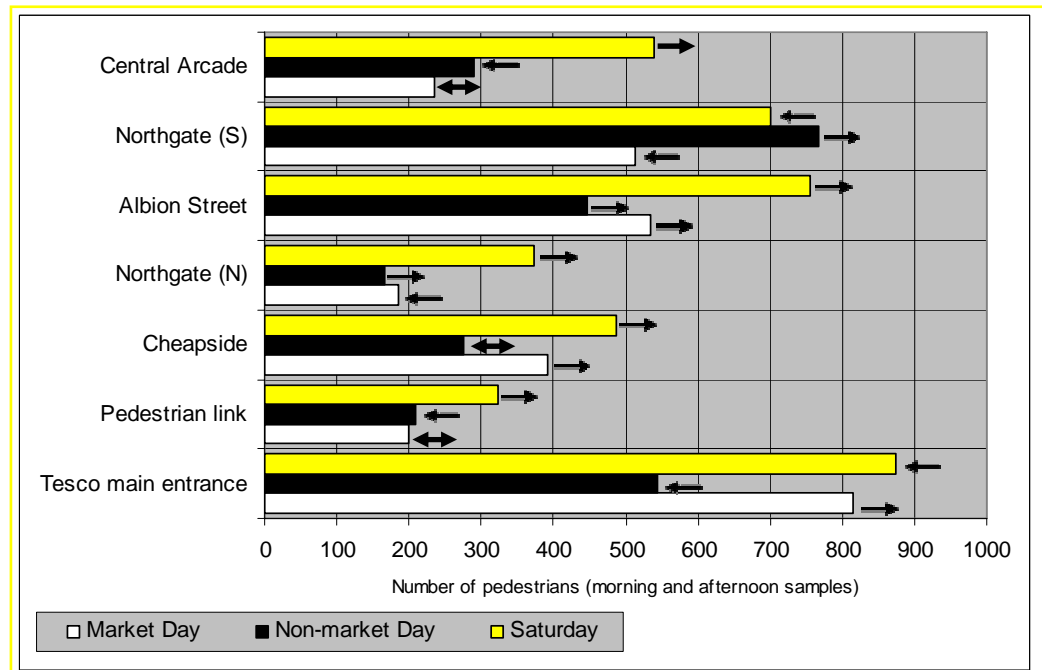
In terms of street by street activity, Figure 5 indicates this year's performance and change in volume of visitors since last year. This shows that the main entrance to the Tesco store and the southern end of Northgate continue to achieve the highest number of

pedestrians but this year Albion Street also records similar levels.

Figure 5: Street by street pedestrian numbers 2007

The lowest numbers are recorded at the northern end of Northgate and inside the covered pedestrian access to Tesco from Northgate. Central Arcade also records relatively low numbers during weekdays but picks up on the Saturday.

The arrows in Figure 5 indicate the direction of change from last year's assessment.

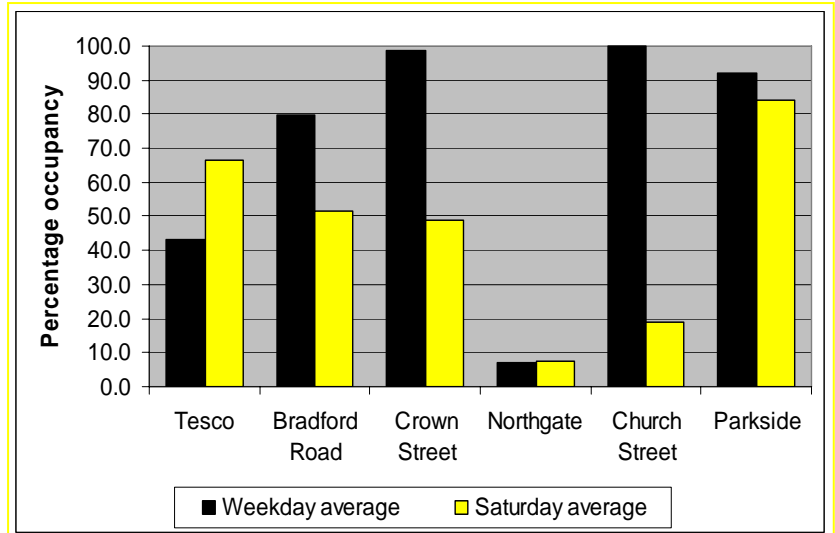


CAR PARK OCCUPANCY LEVELS

Since 2000, occupancy levels within Cleckheaton town centre car parks have been measured using 'spot' checks on the same days as the pedestrian footfall assessments. At four separate times throughout the day, the number of vehicles occupying parking spaces within each of the 6 car parks is recorded. From this, the average daily occupancy rate can then be calculated. Only one of the car parks assessed is privately owned (Tesco), with the others being public car parks. All of the car parks in this assessment are free of charge but do have time restrictions. Figure 6 shows the 2007 average occupancy rates in each of the car parks comparing weekdays to Saturdays. This clearly illustrates a marked difference between the weekday and weekend usage particularly of the Church Street (behind the Town Hall) and Crown Street car parks which are mostly used for long stay purposes by workers during the week.

Figure 6: Car park usage: Weekdays/Saturday 2007

Albion Street



At the weekend, usage of Tesco’s car park increases significantly and the small car park on Parkside maintains its high weekday levels of use. The car park off Northgate is very unpopular – possibly due to its unsurfaced nature and its location away from the main areas of activity and shopping. Very similar patterns of car park usage have been observed on an annual basis since this assessment began.

DEVELOPMENT AND INVESTMENT ACTIVITY

Cleckheaton town centre has seen a number of improvement projects implemented during the past 12 months – much of which has been part of the Local Public Service Agreement (LPSA) programme of investment. Street works including new decorative paving, lighting and tree planting have been undertaken in the Market Place and the Albion Street precinct which have substantially changed the appearance of these areas. In conjunction with this, property improvement schemes have seen the refurbishment of the Market Arcade exterior and the remodelling of its side entrance, along with a number of individual shop front improvements around the town, adding to the overall enhancement of Cleckheaton’s appearance.

The refurbished Market Place



In addition to these improvements, the refurbishment and re-launch of the Aakash restaurant on the edge of the study area was completed in August this year. Outstanding planning permissions currently include the conversion of vacant office space above Central Arcade to form 32 apartments. This was approved in March but work has not yet started. The conversion of a former joinery workshop in St Johns Place to a retail use was granted permission in 2006 and is now complete and trading. An application to construct a new Tesco supermarket with 11 new retail units and associated car parking on the site of the existing store in the town, was refused at Heavy Woollen Planning Committee in October this year. It is expected that a revised application will be submitted in due course. The proposed foodstore on the site at Bradford Road/Horncastle Street is now unlikely to be progressed due to land assembly difficulties.

RETAILER DEMAND

As at October 2007, there is only one registered interest for representation in Cleckheaton – in addition to the interest demonstrated by Tesco. This demand for space comes from a public house operator requiring a unit of around 4,500sq.ft. The assessment of demand, however, does not include the requirement for office or commercial space which may exist in the town, nor does it account for those businesses already present in the town that might be looking to re-locate to bigger or better premises within Cleckheaton.

PRIME RETAIL RENTAL LEVELS

During the 12 months to May 2007, the average UK prime retail rent rose by 2.9%. This rate of growth represents a weakening of the market which has seen slowing growth rates for 3 consecutive years. In the Yorkshire and Humber region, rental gain during the same period reached only 1.5% compared to the 4.0% of the previous year.

At the local level, independent evidence provided by Colliers CRE on behalf of the Council reveals that no new lettings or rent reviews have taken place during the last 12 months within the primary shopping streets of the town. Consequently, the prime retail rental level remains at around £323 per sq.m. (£30 per sq.ft). However, transactional evidence in more peripheral areas of the town does indicate a slight growth in rental levels from a maximum of £285 per sq.m. last year to a maximum of £290 per sq.m. during 2007.

The Aakash Restaurant



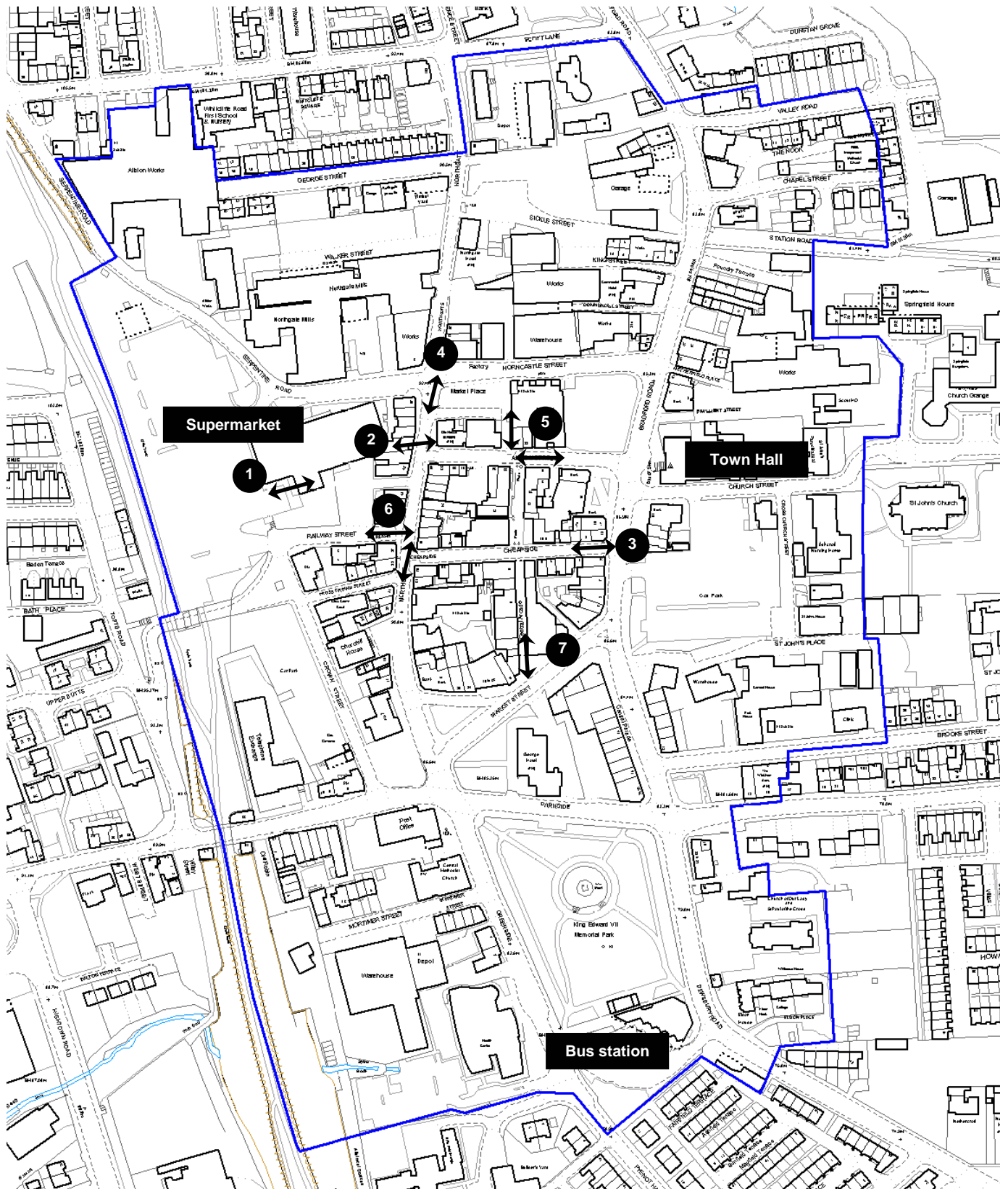
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CLECKHEATON TOWN CENTRE STUDY BOUNDARY AND PEDESTRIAN COUNT POINTS



Key to map:

Position/direction of count

 Study boundary

- | | |
|--|---|
| <p>1 – Tesco main entrance</p> <p>2 – Pedestrian linkway</p> <p>3 – Cheapside</p> <p>4 – Northgate (North end)</p> | <p>5 – Albion Street</p> <p>6 – Northgate (South end)</p> <p>7 – Central Arcade</p> |
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