Town Centres Team – Planning Services

HECKMONDWIKE 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 Heckmondwike town centre was published in November 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 here 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 July 2005 recorded that Heckmondwike town centre provides a total of 11,375 sq.m. (122,395 sq.ft.) of net retail floorspace and 160 shop and service units. Figures 1 illustrates the changes in both retail floorspace and shop unit occupancy since 2004.

Figure 1: Heckmondwike 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)	4,795 (42.2%)	9 (5.5%)	4,776 (42.0%)	8 (5.0%)	-0.4	-11.1
Comparison (non-food)	4,968 (43.8%)	73 (44.8%)	5,091 (44.8%)	70 (43.8%)	+2.5	-4.1
Service	N/A	48 (29.5%)	N/A	47 (29.4%)	N/A	-2.1
Vacant	1,584 (14.0%)	33 (20.2%)	1,508 (13.2%)	35 (21.8%)	-4.8	+6.1
TOTAL	**11,347 (100%)**	**163 (100%)**	**11,375 (100%)**	**160 (100%)**	**+0.2**	**-1.8**

The last 12 months have been relatively static in terms of changes in occupancy within the centre. The only noteworthy changes relate to an increase in the number of vacant units of 6.1%. However, this is balanced against decline in the amount of vacant floorspace – due to the take up of larger vacant units since last years assessment – notably an ex-catalogue store and a furniture store, both of which are located within or close to the primary shopping area. Despite these investments, long term vacancy – particularly of small shop units – continues to be a problem in Heckmondwike and consequently the town's vacancy rates are well above national averages.

There has been a loss of only one convenience shop operator (a newsagent) which has disproportionately affected the amount of change recorded over 12 months – registering a drop of 11.1%. The town continues to be dominated by convenience goods retailing – most notably by the Morrisons supermarket. However, the store does continue to attract large numbers of people into the town who utilise the Blanket Hall Street link to shop in the rest of the town centre.

Figure 2 shows Heckmondwike's occupancy statistics in relation to nearby towns. Despite being the third largest town centre in the Kirklees District, Heckmondwike exhibits a poor level of vacancy, outweighing that of all the other centres in terms of both floorspace and number of units.

Figure 2: Comparisons[1] with nearby towns (sq.m. net)

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

PEDESTRIAN FOOTFALL

Since 1995, pedestrian footfall counts have been undertaken annually in Heckmondwike town centre to measure the volume and pattern of visitor/shopper movement. These assessments cover 7 locations including key access points into the town centre, the entrance to Morrisons and the pedestrian links from the foodstore to the rest of the town centre. 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 2003.

Figure 3: Heckmondwike pedestrian numbers 2003-05 [2]

		2003	2004	2005	% change (04-05)
Market day	a.m.	1812	1436	1510	+5.2
	p.m.	943	1093	1059	-3.1
Non-market day	a.m.	1307	1231	1188	-3.5
	p.m.	1151	1169	1131	-3.3
Saturday	a.m.	1597	1830	1606	-12.2
	p.m.	1464	1229	1118	-9.0
TOTAL (into town only)		**8274**	**7988**	**7612**	**-4.7**

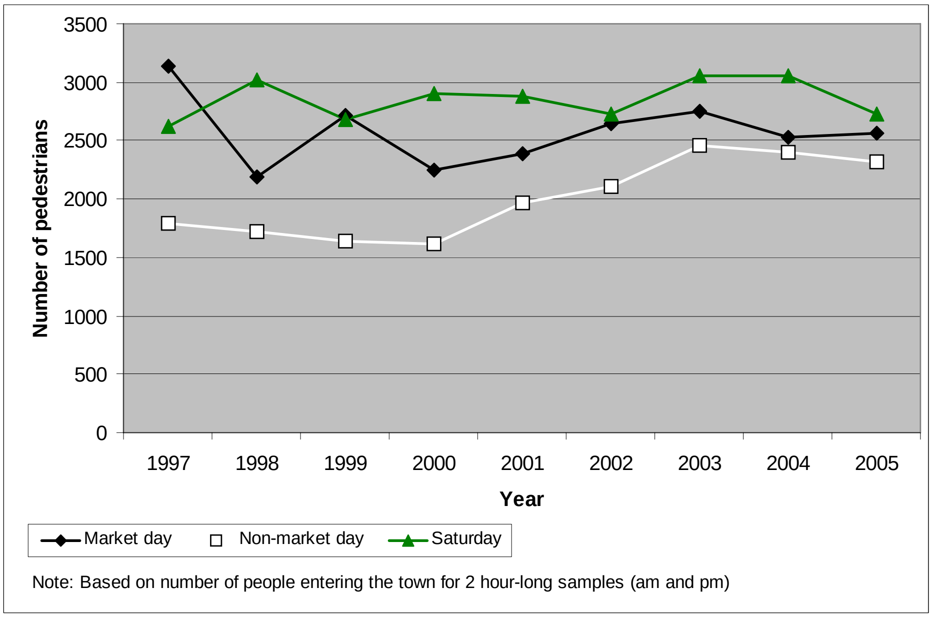
Compared to the previous year's assessment, the overall number of pedestrians recorded in the town centre has declined by 4.7%. However, since 1997 the level of footfall has been relatively static year on year – showing an overall increase of just 1%. Fluctuations in pedestrian numbers have only been minor in nature during this 7 year period. Figure 4 illustrates the changes in the volume of visitors to the town since 1997.

Shops on Westgate

Parking in Market Place

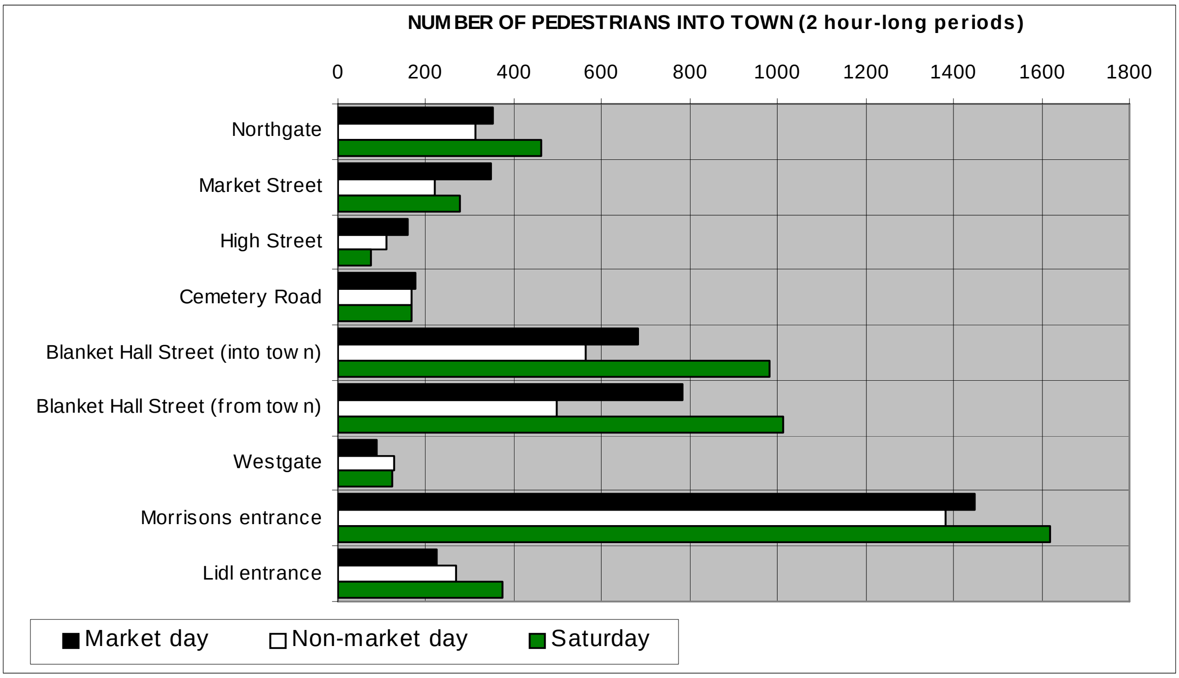
[1] Figures relate to the floorspace contained within the Town Centre Audit Study Boundary of each centre at the most recent published survey date.
[2] Morning counts were conducted for 1 hour between 10:30 and 11:30. Afternoon counts were conducted for 1 hour between 2:30 and 3:30. Totals represent the number of people entering the town and exclude the Blanket Hall Street and new Lidl count points.

Figure 4: The pattern of footfall 1997 – 2005



At the more detailed daily level, this year's assessment shows a drop of 12% on a Saturday morning – despite the warm sunny weather on the day of the survey. The numbers of pedestrians recorded on a non-market day has recovered well from a low in 2000, achieving a growth of 18% since then. Figure 5 shows the street by street assessment of pedestrian numbers for 2005. It clearly shows that Morrisons continues to generate the highest levels of footfall, with Blanket Hall Street acting as a very important link between the store, the market and the rest of the town centre. There is generally a fairly steady flow of pedestrians around the town centre although both Market Street and Northgate tend to be favoured routes into the town – due primarily to the presence of major bus stops.

Figure 5: Pedestrian numbers by street [3] (summer 2005)



RETAIL DEVELOPMENT IN THE PIPELINE

Development within Heckmondwike town centre during the last 12 months has been predominantly of a non-retail nature. New residential apartments are nearing completion just off High Street; and the Council has invested money in refurbishing the public toilets near the Market Street/High Street junction as part of a district-wide programme of improvements. Minor retail development includes changes to shop fronts and refurbishment of units by new occupiers.

[3] All count points record pedestrians coming INTO the town only, unless otherwise stated.

A joint scheme costing £210,000 to provide CCTV camera coverage in both Heckmondwike and Cleckheaton became operational in April 2005. This scheme provides 4 cameras in Heckmondwike town centre. The refurbishment of the clock in Market Place is also now complete.

Heckmondwike continues to experience a number of issues relating to streetscape and building quality. The Council, alongside local groups, will endeavour 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, undertaken in September 2005, identified no registered retail requirements for representation in Heckmondwike. However, it is important to note that this assessment does not take account of office use occupiers that may have a requirement for space within the town, nor does it measure the level of demand from locally based businesses. Therefore, there may be retailers with a requirement for Heckmondwike who have not been recorded by this assessment.

New Post Office on Market Street

PRIME RETAIL RENTAL LEVELS

High Street shop units

There has been very little change in prime retail rents since the construction and occupation of the new shop units adjoining the Morrisons store in 2000. These units continue to secure the highest rents in the town of approximately £237 - £269 per sq.m. (£22 - £25 per sq.ft.).

Elsewhere in the town rents currently achieve a maximum of £204 per sq.m. (£19 per sq.ft.) – having experienced no change during the last 12 months.

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