

CLECKHEATON TOWN CENTRE ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS SEPTEMBER 2006

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 Services. 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 against 7 key economic indicators has been reported in annual publications. In this 2006 edition, the following indicators of vitality and viability are assessed:

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

FLOORSPACE, SHOP UNITS AND VACANCY

The annual survey of shop unit occupancy was undertaken in June 2006. Within the Cleckheaton Town Centre study boundary - defined by the bus station to the south, the Spen Valley Greenway to the west, Scott Lane to the north and including land fronting Bradford Road to the east - there is approximately 8,000sq.m. of net retail floorspace. Of this, more than 60% is occupied by comparison (non-food) goods with a further 24% of floorspace accommodating convenience goods (food) sales. In terms of shop units, there are a total of 100 currently in retail use with a further 46 occupied by services and 16 that were vacant at the time of the survey. 2 further units were also under refurbishment in June and when complete will increase the number of units in retail use.

Figure 1 gives a breakdown of the principal categories of use compared with the make up of the town last year. It is evident that vacancy rates in terms of both floorspace and unit numbers has increased over the last 12 months. However, the level of vacancy remains below that recorded in 2004 where empty units

Figure 1: Cleckheaton floorspace and shop unit statistics

	2005		2006		% change 2005-2006	
	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units
Convenience (food)	1,950 (23.5%)	16 (9.7%)	1,924 (23.6%)	15 (9.1%)	-1.3	-6.3
Comparison (non-food)	5,580 (67.5%)	94 (57.0%)	5,069 (62.2%)	85 (51.9%)	-9.2	-9.6
Service	N/A	43 (26.0%)	N/A	46 (28.0%)	N/A	+7.0
Vacant	741 (9.0%)	12 (7.3%)	1,084 (13.3%)	16 (9.8%)	+46.0	+33.3
Under refurbishment	n/a	n/a	73 (0.9%)	2 (1.2%)	n/a	n/a
TOTAL	8,271 (100%)	165 (100%)	8,150 (100%)	164 (100%)	-1.5	-0.6

accounted for 17.8% of floorspace. Much of the new vacancy is located on the periphery of the main shopping area. For example, at the northern end of Northgate a unit formerly occupied by a carpet retailer with a floorspace of around 230sq.m, is now vacant. This unit falls within the proposed development site for an ASDA supermarket (see Development and Investment section,

page 4). Despite its relatively high number of vacant units this year, Cleckheaton has very little long term vacancy and the town exhibits a healthy level of retailer movement and investment.

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

	Cleckheaton	Batley	Heck'wike	Dewsbury	Holmfirth
Convenience	1,924 (23.6%)	6,131 (25.0%)	4,914 (45.2%)	8,336 (19.4%)	1,509 (22.8%)
Comparison	5,069 (62.2%)	16,646 (68.0%)	4,636 (42.6%)	31,281 (72.9%)	4,000 (60.5%)
Vacant	1,084 (13.3%)	1,725 (7.0%)	1,333 (12.2%)	3,287 (7.7%)	467 (7.1%)
Under refurbishment	73 (0.9%)	n/a	0 (0%)	n/a	639 (9.7%)
Total retail floorspace	8,150 (100%)	24,502 (100%)	10,883 (100%)	42,905 (100%)	6,615 (100%)
Vacant units	16 (9.8%)	18 (8.7%)	33 (22.0%)	58 (16.7%)	11 (7.1%)
Units under refurbishment	2 (1.2%)	n/a	0 (0%)	n/a	3 (1.9%)
Total no. of units	162 (100%)	206 (100%)	150 (100%)	348 (100%)	154 (100%)

Figure 2 illustrates the proportions of shop unit occupancy in other Kirklees towns. This shows that Holmfirth has the lowest unit vacancy rate, closely followed by Batley. Floorspace vacancy in Cleckheaton is currently higher than any of the other towns assessed in Figure 2. The proportion of floorspace vacancy in the town is skewed due to the larger than average sized vacant unit on Northgate. However, the good economic health of the town is in part evidenced by the 'under refurbishment' category. This shows a level of investor interest and confidence, and commercial growth.



Empty unit on Dewsbury Road



Saturday Market

PEDESTRIAN FOOTFALL

Figure 3: Cleckheaton pedestrian numbers 2005-06²

		2005	2006	% change
Market day (Tue 20th June)	a.m.	1315	1191	-9.4
	p.m.	1048	955	-8.9
Non-market day (Thu 22nd June)	a.m.	1217	1262	+3.7
	p.m.	961	1092	+13.6
Saturday (24th June)	a.m.	2349	2129	-9.4
	p.m.	1578	1434	-9.1
TOTAL (into town only)		8468	8063	-4.8

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 2006 pedestrian count results and the changes recorded since the last assessment.

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 represent the number of people entering the town and exclude the pedestrian link count point.

In overall terms, the town has seen around a 5% drop in pedestrian numbers when compared to last year. However, last year's Saturday numbers were boosted by the town's family fun day event, producing a much higher than normal level of footfall. Given that this year's overall figure has dropped by less than the increase achieved last year, the town has in fact maintained a 'boost' in visitor numbers – which is particularly evident on the Saturday. The pattern of change in pedestrian activity levels since 1997 is shown in Figure 4. This illustrates the relatively static weekday numbers compared to the Saturday level. Monitoring will continue to be undertaken annually to assess whether this growth in Saturday visitors continues.

Figure 4: The pattern of footfall 1997 – 2006

At the time of this year's assessment of pedestrian movement, the Council was offering 25% discounts on charges for running additional stalls in the open market for existing traders. This initiative is part of the work being undertaken in the town for the Council's Local Public Service Agreement with central Government (see Development section on page 4). Consequently, the Saturday market was much better occupied than in previous years and may well have contributed to generating higher levels of pedestrian movement.

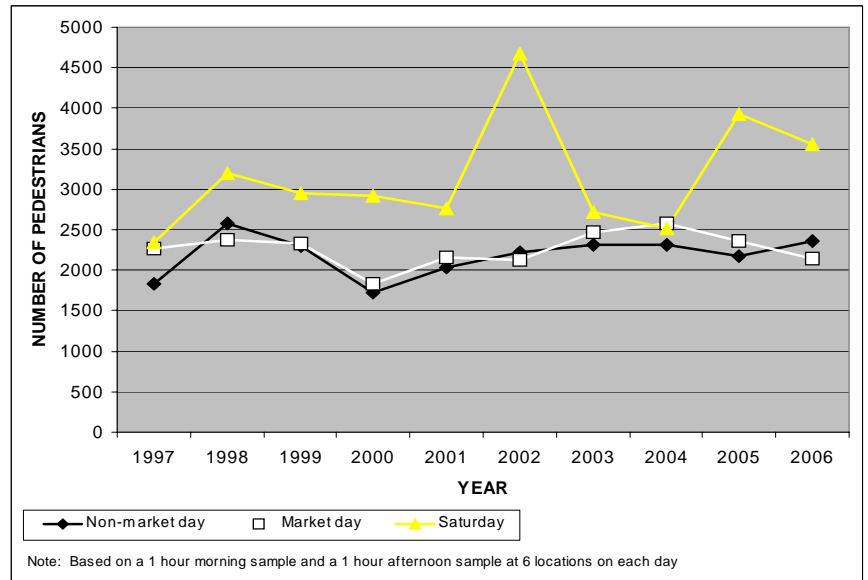


Figure 5: Street by street pedestrian numbers 2006³

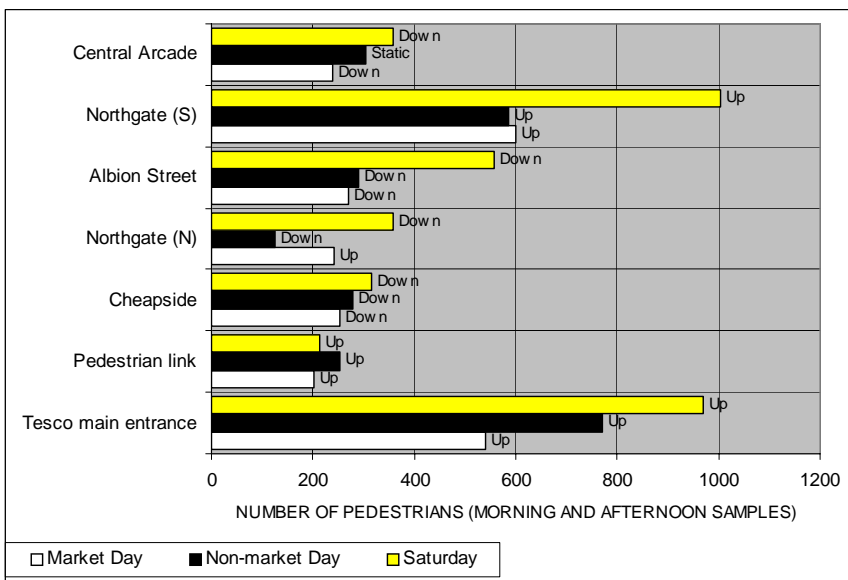


Figure 5 shows the volumes of pedestrians by street and indicates the change in level of footfall since last year's assessment (up, down or static). This illustrates that the entrance to the Tesco foodstore and its pedestrian link down to Northgate have both recorded higher usage this year. In addition, the pedestrian route from the foodstore car park down Railway Street to Northgate appeared to be generating more footfall which is reflected in the Northgate (South) count point figures.

DEVELOPMENT AND INVESTMENT ACTIVITY

Cleckheaton town centre has seen some development activity during the last 12 months albeit on a smaller scale to the previous year. May 2006 saw the completion of the new health centre on Greenside whilst 2 new retail units have been built at the junction of Bradford Road and Brooke Street. These units are shortly due to be occupied by a mortgage advice shop and a sandwich retailer.

³ All count points record pedestrians coming INTO the town only and therefore the total excludes the pedestrian link walkway which links the Tesco foodstore with Northgate

Development currently in the pipeline for implementation includes the proposed 5,500sq.m. foodstore on the site at Bradford Road/Horncastle Street which is set to be occupied by ASDA. Detailed aspects of the proposal were granted permission by the Local Planning Authority in November 2005 and the applicant now has a 2 year deadline for implementation of the scheme.

Permission was granted in June 2006 for the erection of a glass canopy to the front of the Wetherspoons public House on Bradford Road to create a covered outdoor area. This has a 3 year implementation deadline.

Investment activity in the town centre includes the Local Public Service Agreement (LPSA). Cleckheaton is one of three towns chosen to benefit from the 3-year programme of environmental and economic initiatives to improve the health and vibrancy of the centre. Some of the programmed LPSA streetscape improvement works have already started in the precinct joining Albion Street and Cheapside. Further works including a property improvement grant scheme, the installation of public art features and town centre promotional events are being progressed.



The completed health centre

RETAILER DEMAND

A total of 5 retail and leisure operators have expressed interest in establishing businesses in Cleckheaton town centre. Together these would require a total floorspace provision of 7,500sq.m. in prime or good secondary locations. These expressions of interest include the potential new ASDA store at the Bradford Road/Horncastle Street site. Further requirements for representation in the town come from a cosmetics retailer, a restaurant operator and two public house chains. There has also recently been an expression of interest from Tesco who are looking to expand their current representation in the town, although no planning application has yet been received.

PRIME RETAIL RENTAL LEVELS



King Edward VII Memorial Park

Prime retail rents across the Yorkshire and Humberside region have risen by 4.0% in the 12 months to May 2006. At the local level, independent evidence provided by Colliers CRE on behalf of the Council reveals that rental levels in Cleckheaton peak at around £323 per sq.m, achieved along the primary shopping street of Cheapside.

Within the more peripheral retail areas of the town, rental levels peak within the range £215 - £285 per sq.m. and remain unchanged since last year.

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