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DEWSBURY TOWN CENTRE AUDIT 2001

FACT SHEET 4: RETAIL DEMAND AND OPPORTUNITIES

Introduction

This document, produced by Kirklees MC's Planning Service, is designed to provide supplementary information on retail demand, development opportunities, commercial rents/yields and retail employment 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.

Retailer demand

A general assessment of retailer demand was undertaken in June 2001. This revealed that there is an unsatisfied requirement for representation in Dewsbury. The table below shows the fluctuation in the level of retailer demand over the last 10 years.

Changes in retailer demand 1992 - 2001

Number of requirements	Year
18	2001
20	2000
19	1999
15	1998
13	1997
13	1996
16	1995
15	1994
18	1993
16	1992

Source: Retail Focus – Property Intelligence PLC / KMC

As at July 2001, 18 retailers had registered an interest for representation in Dewsbury, equating to 17,742 sq.m. (191,000 sq.ft.) gross floorspace. Whilst this is a decline on the previous year's figures, it nevertheless shows a continuing healthy interest from a range of retailers/services. However, it should be noted that a requirement for Dewsbury is not necessarily a requirement for the town centre. Some large-space users are looking for units in either out of centre or edge of centre locations. This is principally due to the difficulties of site assembly, high rents and lack dedicated surface level parking.

2 retailers included in the list are shortly to be accommodated in Dewsbury through the construction of purpose-built stores - Asda and Wilkinsons.

46% of the total floorspace requirement comes from the convenience goods sector. This is dominated by Asda and its requirement for a 6,970 sq.m. (75,000 sq.ft.) foodstore.

95% of registered interests would be new to the town. Only 1 retailer has expressed a requirement for relocating within the town from an existing unit.

Retailer requirements

Category of use	Number of registered interests	Max floorspace requirement sq.m. gross
Convenience	4	8,151
Clothing/footwear	2	2,128
DIY/hardware	1	2,138
Mixed/variety	3	2,138
Other comparison goods	4	799
Restaurants/takeaway	3	1,533
Public house	1	855
TOTAL	**18**	**17,742**

Source: Retail Focus-- Property Intelligence PLC/KMC

It is important to note that this list of interests should not be treated as definitive. There are likely to be other retailers who have a requirement for representation in Dewsbury or who may wish to re-locate within the town centre to larger and/or better quality premises but have not registered their interest. Furthermore, this assessment has not addressed the demand that may exist from financial and professional services for office accommodation within the town centre.

Development opportunities

The following briefly identifies the development opportunities both within and immediately adjoining Dewsbury town centre. The list is by no means exhaustive and clearly other sites may come forward following land assembly. However, as at December 2001, these sites made up the known development opportunities amounting to some 3.03 hectares (7.49 acres).

Former Library, Wellington Road. The site consists of the Grade II listed library and the old second class baths. The library facility was relocated about 3 years ago to a new building on Railway Street. In 2000, the old library building was refurbished and used briefly as a bistro/restaurant. It is now vacant. The premises are suitable for a number of alternative uses such as leisure, offices and housing (0.34 ha).

Victoria Centre, Wellington Road. This property was previously used as Council offices. It is an imposing building on an important 'gateway' site. Design and siting is therefore particularly important if the re-use of the existing building cannot be secured. Appropriate uses would be housing, offices, education, leisure or retailing, through refurbishment or redevelopment (0.54 ha).

Yorkshire House, South Street. This building is owned by the Council but is surplus to requirements. It represents an investment opportunity based primarily around office use. Nevertheless, other uses such as housing and education would also be appropriate. Demolition may provide opportunities for either retailing or leisure (0.21 ha).

Halifax Road/Bradford Road. The site comprises a triangular portion of land between Halifax Road and Bradford

Road consisting of four premises, two of which are vacant. There is potential for redevelopment to provide leisure, retail, housing or office uses. However, the site is constrained by a lack of off-street car parking and servicing (0.15 ha).

Bond Street area. This includes the bulk of the town centre Conservation Area and a number of fine listed buildings. The area has been targeted for improvement since the mid-1980's and a number of former selling houses and warehouses have been converted and occupied by small local businesses. Refurbishment, rather than redevelopment for commercial, leisure and cultural uses would be appropriate. There is potential for restaurants, hotel accommodation, bars, cultural industries, professional services and residential accommodation within this area of high townscape quality.

Pioneer House, Halifax Road. Pioneer House is an imposing Victorian building occupying a prominent site on the north side of the town centre. Whilst it is in a secondary shopping location, much of the ground floor accommodation is utilised by a mix of retail, quasi-retail and service uses. However, upper floors are only partly let. The owner is currently promoting the premises as an investment opportunity suitable for a variety of uses (0.29 ha).

Wakefield Old Road. The old Sorting Office and Empire House occupy this site. Despite full occupancy of units on the ground floor, Empire House has under-utilised upper floors. The old Sorting Office is part occupied. In addition to offices, residential and leisure uses would be considered appropriate (0.31 ha).

Foundry Street/Corporation Street area. Since the redevelopment of the Princess of Wales Precinct and expansion of the Railway Street Retail Warehouse Park, the centre of gravity of the town has gradually shifted southwards away from this area. However, there have been a number of redevelopment and refurbishment schemes in Northgate, which have introduced a range of alternative uses to retailing (for example, Wetherspoons and the Principal public houses). Other leisure uses are beginning to pay attention to this part of Dewsbury's town centre. Leisure and service uses that are able to take advantage of the high townscape quality of the area will be encouraged.

Spinkwell Mills, Halifax Road. These mill premises, which adjoin the listed railway viaduct, are currently vacant and on the market. They were previously used for retailing, and have the benefit of a small car park and servicing area to the rear with access from Bradford Road. The building/site has opportunity for a range of alternative uses including offices, industrial, housing and leisure (0.62 ha).

Aldams Road (opposite the bus station). This cleared site, which immediately adjoins the footbridge to the new Asda foodstore (currently under construction), used to accommodate a car showroom. Planning permission was granted in 2001 for a retail warehouse of 1371 sq.m. (0.38 ha).

28 Wellington Road. Planning permission was granted in June 2000 for the conversion of this large property to a night-club. The building/land is in a peripheral town centre location. Nevertheless, suitable alternative uses would include offices, leisure and residential (0.12 ha).

23 Northgate. This property immediately adjoins the JD Wetherspoon public house in Northgate. It is an imposing building, but because it has been vacant for a number of years it is now in a poor state of repair. Planning permission was granted in 1998 for its conversion and extension to provide a public house and restaurant. Other suitable uses would be retailing, offices, residential and leisure (0.07 ha).

2 sites within the Dewsbury town centre study area are currently the subject of development activity. These are:
Crackenedge Lane. Planning permission was granted in 2001 for the construction of a purpose built Wilkinsons hardware/housewares store of 2,138 sq.m. gross retail floorspace. This is on the site of the old Mecca Bingo Hall, which moved to refurbished premises on the retail warehouse park approximately 2½ years ago.

Mill Street West. A new Asda foodstore providing 6,970 sq.m. gross retail floorspace is currently being constructed. The development involves the provision of a footbridge, which will span the River Calder and link the store with the town centre and bus station. The store is anticipated to open during May 2002.

Prime rental levels and yields

Average prime zone A retail rents in Great Britain experienced an increase of just 1% during the 12 months to May 2001. This is the lowest annual rate of growth since 1994.

Yorkshire and Humberside secured a 2.7% growth in prime rents over the 12 months to May 2001. This represents a significant decline on the previous year's performance, which recorded a growth of 5.4%. Since 1991, the region has seen prime rents rise by just over 49%. This is well above the 33% increase recorded for the Great Britain average.

The White Rose Centre near Morley and Meadowhall Shopping Centre in Sheffield are 2 reasons why the Yorkshire and Humberside region continues to perform well compared to the Great Britain average. The White Rose Centre opened in 1997 with a prime rent of £2,153 per sq.m. (£200 per sq.ft.) and Meadowhall currently operates with a prime rent of £4,306 per sq.m. (£400 per sq.ft.).

The table below illustrates the difference in prime A zone rents across a broad range of shopping centres in West Yorkshire. At the regional level, Leeds, White Rose and Meadowhall have the highest zone A rents. At the sub-regional level, Huddersfield and Barnsley achieved £1130 per sq.m. (£105 per sq.ft.) in 2001, with Wakefield securing a prime rent of £969 per sq.m (£90 per sq.ft).

Changes in prime rents since 1991 (£ per sq.m.)

Centre	1991	2001	% change in prime rent 1991-2001
Dewsbury	409	538	+31.5
Huddersfield	861	1130	+31.2
Barnsley	753	1130	+50.1
Bradford	915	1507	+64.7
Halifax	700	915	+30.7
Leeds	1615	2691	+66.6
Meadowhall	1507	4306	+185.7
Wakefield	807	969	+20.1
Yorkshire and Humberside	850	1270	+49.4
Great Britain Average	818	1087	+32.9

At a more local level, Dewsbury has a prime zone A rent of £538 per sq.m. (£50 per sq.ft.). This represents an increase of nearly 32% over the 10 year survey period (1991 – 2001). However, much of the rental growth has occurred over the last

3 years. For comparison purposes, zone A rents of nearby smaller towns have been assessed to be:

Batley	£269 per sq.m. (£25 per sq.ft.)
Heckmondwike	£269 per sq.m. (£25 per sq.ft.)
Morley	£377 per sq.m. (£35 per sq.ft.)
Brighouse	£323 per sq.m. (£30 per sq.ft.)

Despite the increase in prime rents over the last 12 months, investors remain concerned about rental growth prospects due principally to the effect of competing shopping facilities. These concerns are reflected in Dewsbury's prime retail yield of 10%, which represents a one percentage point increase on the 1999 figure (Valuation Office Property Market Report: Autumn 2001).

Retail yields in secondary shopping locations are within the range 11% - 13.5%, reflecting the limited demand from retailers for space in off-pitch locations, and the poor quality of much of this floorspace.

Retail employment

In March 2001, the retail sector in Great Britain employed 2,715,800 people (full and part time), or 10.7% of the country's total workforce. Of these, 1,581,500 or 58% were employed on a part time basis. Since 1994, retail employment in Great Britain has recorded a year on year growth, registering an increase of 4.1% over the 12 months to March 2001.

Nationally there is a heavy bias towards female employment in the retail sector, which accounts for 80% of all part time jobs and, 48% of all full time jobs.

The retail sector in Dewsbury town centre (as at June 2001) employed 2,365 people. Of these, 30% were employed in convenience goods retailing, 64% in comparison goods retailing, and 6% in personal retail services. Since June 1999, total retail employment in the town has decreased by 4.3%.

Employee densities (expressed in terms of employees per '000 sq.m) have been obtained for each retail sector. As observed in the 1997 and 1999 audits, these vary between retail sectors, and the differences are largely due to the nature of products being sold. For example, food products require more labour than many consumer durables because of the necessity to ensure shelf lives are not exceeded and that the distribution is both frequent and of high quality. Similarly, retail services like hairdressers, travel agents and opticians are labour intensive because of the requirement to provide individual personal attention to consumers.

On average 38.6 employees per '000 sq.m (3.6 per '000 sq.ft) of net retail floorspace work in the comparison goods retail sector of Dewsbury town centre. This represents a fall of 12% on the 1999 figure. In contrast, there has been an increase in the employee density for convenience goods retailing (+7.6%).

Employee densities by retail sector

Retail sector		Number of employees per '000 sq.m. of retail floorspace	
		1999	2001
Convenience		71.1	76.5
Comparison		44.1	38.6
	Clothes/footwear	61.3	37.0
	Furniture/carpets	25.8	21.5
	Electrical goods	48.4	31.7
	D.I.Y./hardware	14.0	15.9
	Other comparison goods	62.4	53.4
Personal retail services		111.9	93.1

With the exception of convenience and DIY/Hardware, each retail sub sector records either a static or declining labour intensity. Personal retail services recorded the highest employee density of all the retail sub sectors, as in the1997 and 1999 audits.

Turnover per employee by retail sector

Retail sector		Turnover per employee (£)	
		1999	2001
Convenience		85,092	79,648
Comparison			
	Clothes/footwear	44,207	50,156
	Furniture/carpets	53,689	51,126
	Electrical goods	95,922	96,275
	D.I.Y./hardware	79,308	68,993
	Other comparison goods	36,393	42,213

Dewsbury's turnover per employee figures have improved over the last 2 years for the retail sub sectors of clothing /footwear, electrical goods and specialist comparison goods. However, convenience goods, furniture/carpets and DIY/ hardware have experienced declines of 6.4%, 4.8% and 13%, respectively.

There are considerable differences noted in turnover ratios between the primary shopping area and secondary shopping frontages. Turnover per employee ratios for all retail sub sectors are greater in the shopping 'core' than elsewhere in the town centre (excluding the retail warehouse park).

Employment patterns in the town reflect the general pattern of shop unit occupancy, in that Dewsbury has a predominance of small retailers. 177 (86%) of the retail companies in the town employ 10 people or less (full and part time employees). However, 28% of all those working in the retail sector are employed by just 10 companies. These are:

Sainsburys	Marks and Spencer
B & Q	Woolworths
Safeway	Kwik Save
Matalan	Netto
Boots	W.H.Smith

Whilst the total number of people employed in the retail sector has been calculated, it has not been possible to provide a complete picture of the pattern of retail employment in Dewsbury, principally because employment details were not provided by all town centre businesses (May/June 2001 Business Questionnaire Survey). Nevertheless, a general guide to the ratio of full time to part time employees, and of male to female employees in Dewsbury town centre has been obtained. This revealed that, of those who responded:

- 37% of employees are in full time work, with 63% in part time work;
- Female employment accounts for 67% of all employee numbers in the town centre (full and part time);
- 52% of all full time employees are female, with male full time employees accounting for 48% of jobs;
- 77% (just over three quarters) of part time employees are female, with male employees accounting for only 23% of part time jobs, and
- 9.3% of employees are from an ethnic minority background.