Town Centres Team, Planning Services

DEWSBURY TOWN CENTRE

ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS

December 2007

INTRODUCTION

Monitoring of the health and vitality of Town Centres in the Kirklees District is undertaken on an annual basis through the Town Centre Audit programme facilitated by the Town Centres Team, Planning Services.

The role of individual town centres is assessed through analysis of performance data which identifies the scope for change, renewal and diversification.

Annual statements have been produced for the Dewsbury Town Centre study area since 1997 assessing 7 key indicators of health and vitality. These are:

- Shop unit and floorspace occupancy
- Vacancy rates
- Pedestrian footfall
- Development activity
- Demand for representation
- Prime retail rental levels
- Prime retail yields

The accessibility of the town and the use of car parks within the study area have also been addressed in this document.

FLOORSPACE, SHOP UNITS AND VACANCY RATES

A survey of the occupancy of shop units within the town centre study boundary, as shown on the map on page 8 was undertaken in October 2007. This revealed that within this area there are 344 shop units with 6.4% trading in convenience goods, 54.4% trading in comparison goods and 23.5% being occupied by traditional town centre services as shown in figure 1.

Figure 1: Dewsbury shop unit/floorspace 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)	9,923 (20.3%)	21 (6.1%)	9,969 (20.2%)	22 (6.4%)	0.5	4.8
Comparison (non-food)[1]	33,220 (68.1%)	191 (55.5%)	32,011 (65.0%)	187 (54.4%)	-3.6	-2.1
Service	N/A	80 (23.3%)	N/A	81 (23.5%)	N/A	1.3
Under refurbishment	94 (0.2%)	3 (0.9%)	960 (1.9%)	9 (2.6%)	See text	See text
Vacant	5,520 (11.3%)	49 (14.2%)	6,304 (12.8%)	45 (13.1%)	14.2	-8.2
TOTAL	**48,757 (100%)**	**344 (100%)**	**49,244 (100%)**	**344 (100%)**	**1.0**	**0**

Shop unit vacancy accounts for 13.1% of shop units with 2.6% being recorded as under refurbishment. In total, occupied and vacant units provide approx. 48,284 sq.m. of net floorspace.

Overall, a slight increase has been recorded in sales floorspace within the study area since the previous year. In terms of convenience goods, two small grocers have opened specialising in eastern european foods. Comparison goods retailing has seen a decrease in sales floorspace and shop units which is partly attributed to the loss of independent retailers trading in furniture, textiles and fashion wear.

A significant increase in shop units and sales floorspace has been recorded in the under refurbishment category due to a proposal to redevelop Pioneer House on Halifax Road in the northern end of the main shopping area. This incorporates 6 shop units totalling a sales floorspace of 482 sq.m. and 1 office unit which are no longer available for lease and have become part of the long term redevelopment project. In addition, during the time of the survey the shop unit vacated by Kwik Save was under refurbishment and has since been occupied by Fulton Foods and Lloyds pharmacy.

Although, the figures show a significant increase in vacant floorspace, this is due to the vacant unit previously occupied by Glyn Webb located on the retail park to the south of Dewsbury main shopping area. The reduction in vacant shop units within the study area can be in part contributed to the conversion of shop units to apartments on Nelson Street to the West of the main shopping area. The number of shop units has remained the same as the previous year with the loss of the shop units on Nelson Street being made up by other changes in the town such as the division of the former Kwik Save store into two units. 53% of the vacant units are located within the main shopping area and vacant sales floorspace ranges from 12 sq.m to 250 sq.m. During the time of the survey, Marks and Spencer was still trading and therefore is included in the figures for comparison goods retailing, however, it is noted that this store closed in mid October.

Highlighted in figure 2 is the change in sales floorspace and shop units from 2006 to 2007 excluding the old Safeway store and the old Glyn Webb unit which are located on the periphery of the main shopping area.

Figure 2: Dewsbury shop unit/floorspace statistics excluding large peripheral vacant units

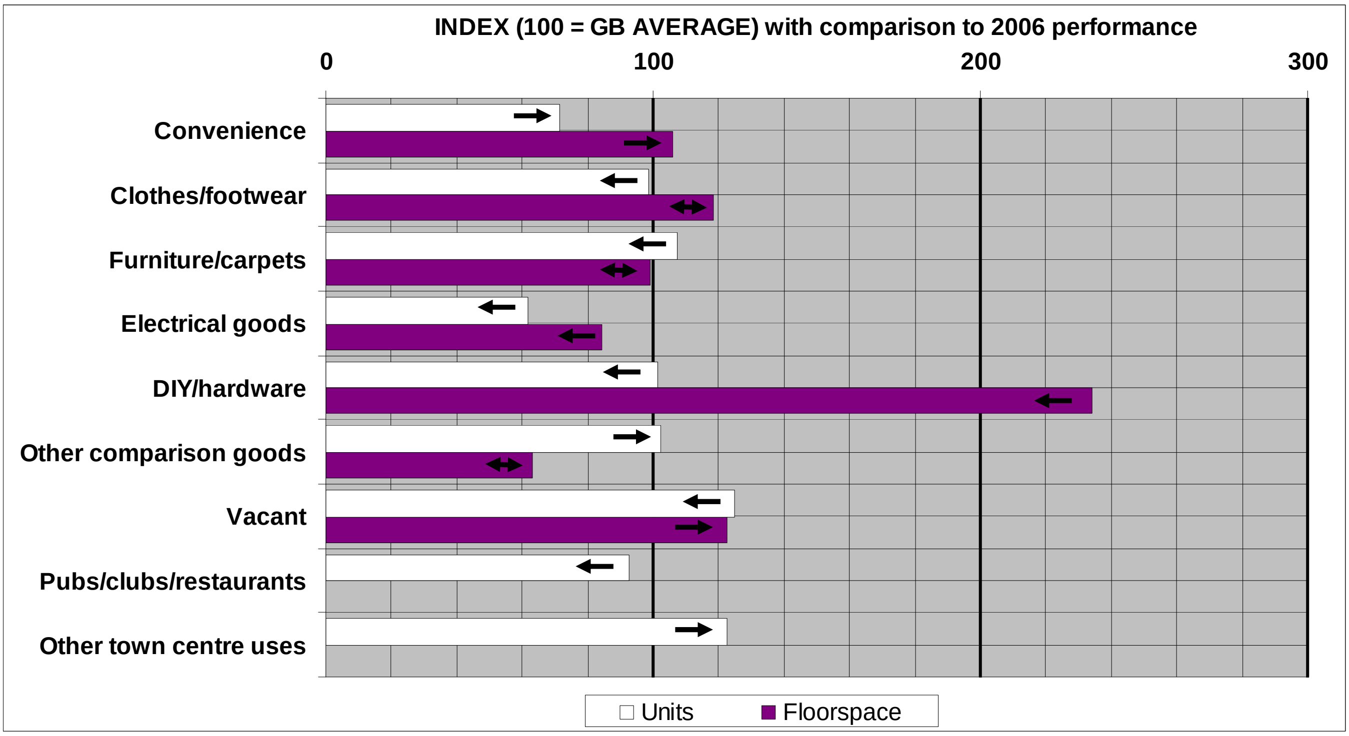
	2006		2007		% change 2006-2007	
	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units	Sales fl'space sq.m.	Shop units
Convenience (food)	9,923 (21.4%)	21 (6.1%)	9,969 (21.8%)	22 (6.4%)	0.5	4.8
Comparison (non-food)[1]	33,220 (71.7%)	191 (55.7%)	32,011 (70.1%)	187 (54.7%)	-3.6	-2.1
Service	N/A	80 (23.3%)	N/A	81 (23.7%)	N/A	1.3
Under refurbishment	94 (0.2%)	3 (0.9%)	960 (2.1%)	9 (2.6%)	See text	See text
Vacant	**3,122 (6.7%)**	**48 (14.0%)**	**2,746 (6.0%)**	**43 (12.6%)**	**-12.0**	**-10.4**
TOTAL	**46,359 (100%)**	**343 (100%)**	**45,868 (100%)**	**342 (100%)**	**-1.1**	**- 0.3**

Figure 3 shows a comparison of the nature of business use within the study area to the national average. The centre has seen a reduction in the DIY/hardware category since 2006, however, it remains well above the national average in terms of floorspace. This is due to the continued occupancy of a number of DIY/hardware retailers in large units on the retail warehouse park to the south of the main shopping area.

Although vacant floorspace is above the national average, this includes both the old Safeway unit and the Glyn Webb unit. Taking these out of the picture results in vacant floorspace being well below the national average.

Representation of pubs/clubs/restaurants has fallen below the national average during the last 12 months.

Figure 3: Comparison with national averages[2]



PEDESTRIAN FOOTFALL

The volume and pattern of movement of shoppers and visitors to Dewsbury Town Centre has been monitored through pedestrian counts, since 1997. Primary and secondary shopping frontages and important pedestrian links are covered on market day, non-market day and Saturday using ten count points which are shown on the map on page 8.

Pedestrian numbers overall have seen a reduction of 4.6% on the previous year with Saturday recording a significant decline in numbers during the morning and the afternoon as shown in figure 4. It is interesting to note that non-market day shows a marked increase on the previous year.

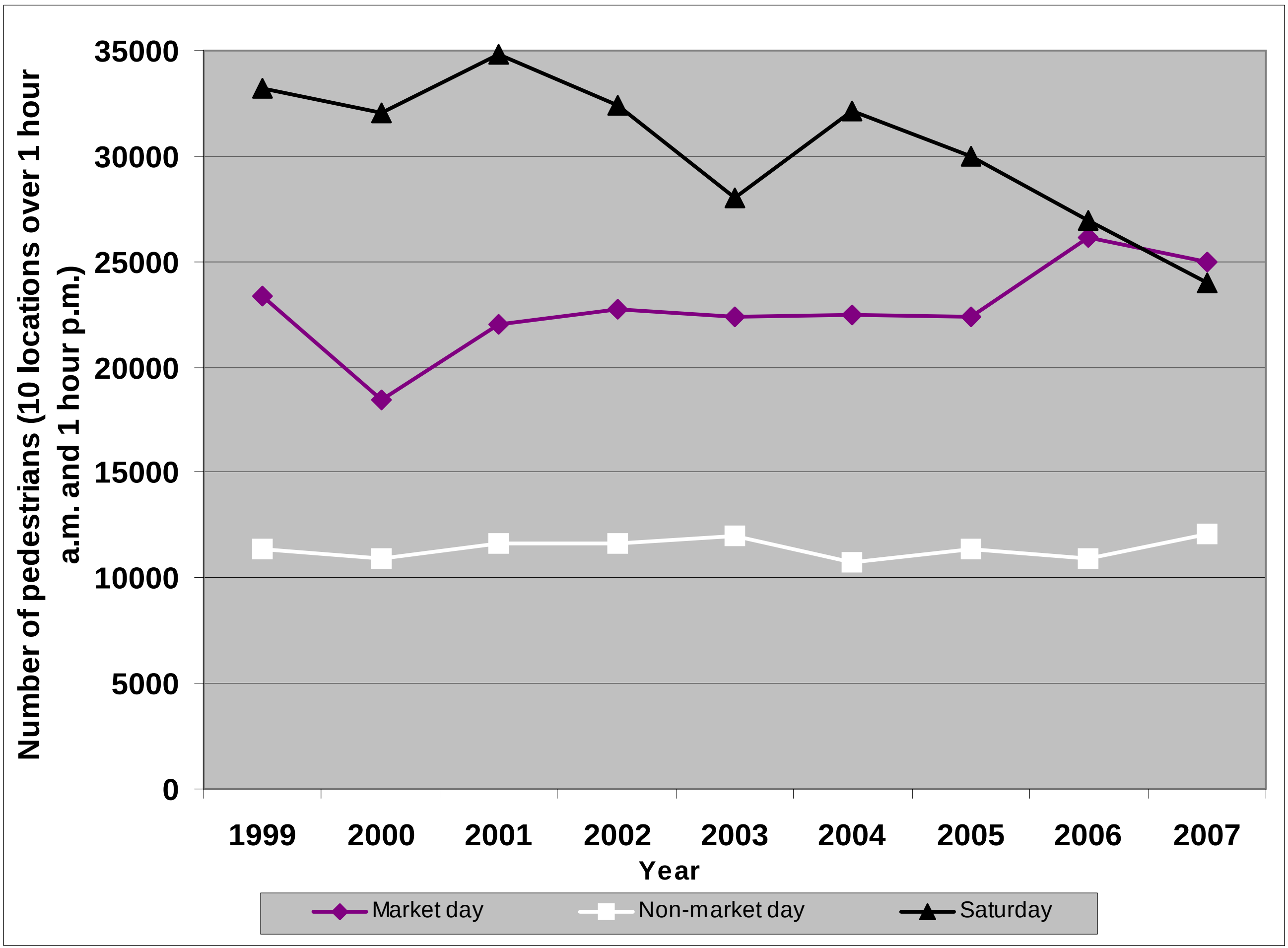
Although Market Day recorded a decrease in numbers, the figure remains higher than those recorded in the years preceding 2006 as demonstrated in figure 5.

Figure 4: Comparison of pedestrian numbers Autumn 2006 to Autumn 2007

		2006	2007	% change
Market Day	a.m.	15333	14582	-4.90
	p.m.	10806	10350	-4.22
Non-Market Day	a.m.	5714	6616	15.79
	p.m.	5194	5503	5.95
Saturday	a.m.	13496	12636	-6.37
	p.m.	13462	11372	-15.53
TOTAL		**64005**	**61059**	**-4.60**

South Street

Figure 5: Pedestrian footfall Autumn 1999 – Autumn 2007



A 'snapshot' of the volume of pedestrians and their movement around the town centre is shown in figure 6. As in previous years, the principle areas of pedestrian activity are Market Place, Longcauseway and the Princess of Wales Precinct. Foundry Street recorded significantly higher numbers on market day highlighting the draw of the open market.

Figure 6: Autumn pedestrian counts, Morning and Afternoon samples*

Date	10th October 2007 Market Day (Wednesday)		11th October 2007 Non-Market Day (Thursday)		13th October 2007 Saturday	
Weather	Dry/Mild/Dull		Dry/Warm/Sunny		Overcast/Dull/ Damp	
Time	a.m.	p.m.	a.m.	p.m.	a.m.	p.m.
1. Train Station (Out)	213	202	94	136	140	167
2. Bus Station (Out)	846	382	354	278	833	381
3. Princess of Wales Precinct	1570	1162	1035	1032	1569	1504
4. Westgate	1025	991	731	653	1694	1523
5. RWP Subway	1824	1111	767	572	1702	1616
6. Longcauseway	2523	1721	945	733	1801	2279
7. Market Place	2228	1679	1292	979	2142	1602
8. Northgate	710	667	522	490	467	458
9. Foundry Street	3443	2155	714	404	2153	1738
10. Halifax Road	200	280	162	226	135	104
TOTAL	**14582**	**10350**	**6616**	**5503**	**12636**	**11372**

*Figures relate to hour long samples (10:30am – 11.30am and 2:30pm – 3:30pm)
Counts in both directions unless otherwise indicated.

ACCESSIBILITY

Town centres should be well served by a choice of means of transport including public transport, provision for pedestrians and cyclists and access to car parking as set out in Government guidance, Planning Policy Statement 6: Planning for Town Centres.

Public Transport and Cycling

Dewsbury bus station is located in the town centre to the south of the main shopping area. Regular bus services connect the centre to the local area, the surrounding towns of Cleckheaton, Heckmondwike and Huddersfield and to the cities of Leeds and Wakefield.

A railway station is situated adjacent to the ring road to the west of the town centre. The main shopping area is approx 200 metres walking distance from the station and is easily accessible. The station connects Dewsbury through local services to smaller centres such as Ravensthorpe and Mirfield. It also connects Dewsbury to Huddersfield and Leeds and the wider region.

The Calder Valley Greenway, a mainly traffic-free route, connects Huddersfield and Dewsbury town centres. It also links with the Spen Valley Greenway providing a traffic-free route from the centre to Heckmondwike and Cleckheaton. Free cycle parking facilities are provided around the town centre.

Car Parking

Within the town centre study boundary, there are approx 3080 off street car parking spaces. There is also a large amount of on-street parking available throughout the town centre with charges ranging from 40p per half an hour to £4.00 for all day.

A snapshot of car park use in Dewsbury is undertaken on the same days as pedestrian footfall. In October 2007, the majority of car parks recorded higher occupancy figures in the morning than in the afternoon on all three days. Not surprisingly, the car parks within the ring road and closest to the main shopping area recorded the highest levels of occupancy. On Saturday, there is a notable decrease in the level of car occupancy in the train station car park suggesting that on a week day it is predominately used by commuters.

DEVELOPMENT AND INVESTMENT ACTIVITY

In the western area of the town centre, planning permission was granted in 2005 for the conversion of retail units along Nelson Street/Old Westgate into 17 no. residential units, which were recorded as completed in 2007. Adjacent to this development planning permission was granted in 2006 for change of use from a warehouse to form a beauty salon which is now trading. In addition, land off old Westgate was given planning approval in 2005 for the erection of 14 no. apartments with development works taking place at the time of the shop unit occupancy survey.

New Spa, Old Westgate

In the north of the town centre, recent proposals have been submitted for the change of use, alteration and extension to Pioneer House together with new build to form A1 (retail), C3 (95 apartments), A3/A4/A5 uses, gymnasium and ancillary management office together with associated access, parking, landscaping and servicing.

A planning application has been submitted on behalf of Asda Stores Ltd for a mezzanine extension comprising of 1194 sq.m. to the existing Dewsbury store on Mill Street West on the edge of the town centre.

Kirklees Council in partnership with the private sector has launched The North Kirklees Strategic Development Framework, a 20 year development programme to regenerate north Kirklees which incorporates Dewsbury Town Centre.

RETAILER DEMAND

A general assessment of demand for retail floorspace has been undertaken. The number of companies expressing an interest in being represented in Dewsbury and their maximum floorspace requirement is shown in figure 7. This includes businesses which have registered an interest in out of centre locations incorporating established retail parks and/or out of town shopping centres.

Figure 7: Retail / Leisure floorspace requirements

	Registered interests	Total floorspace requirement sq.m. (sq.ft.)
Convenience	4	1,729 (18,600)
Clothing/ Footwear	4	3,717 (40,000)
Furniture/ Carpets	1	3,717 (40,000)
Electrical goods	0	0
DIY/ Hardware	1	465 (5,000)
Variety/ Department	1	929 (10,000)
Specialist comparison	2	204 (2,200)
Restaurants/ Pubs	4	1,958 (21,070)
Personal Retail Services	1	93 (1,000)
Leisure/ Hotels	0	N/A
Other	1	N/A
Total	**19**	**12,812 (137,870)**

As at February 2008, a total of 19 separate interests for representation in the town centre had been recorded, this is the same as in the previous year.

New companies interested in the town since the 2006 assessment total 5, which together require a maximum floorspace of 2,376 sq m. (25,570 sq ft). Of these, 3 are in the restaurant/pubs category.

Nine companies have expressed an interest in prime pitch town centre locations accounting for a maximum floorspace of 4,814 sq.m. (51,800 sq.ft), 7 of these are national multiple retailers which is a reduction of 3 on the previous year.

Further requirements may exist from other retailers who wish to relocate or establish themselves within the town centre but have not registered their interests.

This assessment does not address the demand for office accommodation from financial, professional or other commercial uses.

PRIME RETAIL RENTAL LEVELS

Figure 8: Prime Zone A retail rents for selected towns[3] per sq.m (£ per sq.ft)

	2003	2004	2005	2006	2007
Dewsbury	538 (50)	700 (65)	700 (65)	753 (70)	753 (70)
Huddersfield	1,130 (105)	1,130 (105)	1,130 (105)	1,184 (110)	1184 (110)
Wakefield	1,130 (105)	1,238 (115)	1,238 (115)	1,238 (115)	1238 (115)
Halifax	915 (85)	969 (90)	969 (90)	1,023 (95)	1,023 (95)
Barnsley	1,292 (120)	1,292 (120)	1,292 (120)	1,292 (120)	1292 (120)
Regional average[4]	1,346 (125)	1,405 (131)	1,432 (133)	1,484 (138)	1,506 (140)
National average	1,165 (108)	1,201 (112)	1,249 (116)	1,291 (120)	1,321 (123)

During the 12 month period from May 2006 to May 2007, United Kingdom prime zone A retail rents increased on average by 2.8%. This is the third consecutive year that the market has weakened. In the Yorkshire & Humber region rental growth achieved 1.5% during the same period compared to 4.0% in the previous year.

Prime zone A rents in Dewsbury have seen no change from 2006. Rental levels for selected towns in the region as shown in figure 8 have also remained static.

PRIME RETAIL YIELDS

The ‘all risk yield’ for Dewsbury has strengthened to 8.5% during the last 12 months. There continues to be strong retailer demand for representation in prime pitch locations. It has recently been reported that Peacocks fashion retailer is to open a store in the unit vacated by Marks & Spencer in the core of the town.

Figure 9 shows ‘all risk yield’ for selected towns in the region. All but one of the towns assessed have seen changes in yields during the past 12 months.

Figure 9: Prime Retail yields for selected towns[5] (%)

	2003	2004	2005	2006	2007
Dewsbury	10.0	8.0	8.0	9.0	8.5
Huddersfield	7.5	7.5	7.5	7.5	7
Wakefield	8.0	7.0	7.0	6.25	6.75
Halifax	9.0	8.0	8.0	8.0	7.5
Barnsley	7.25	7.25	7.25	7.25	7.25

Source: Valuation Office Property Market Report July 2007

Northgate (former M&S)

Notes:

[1] Comparison goods figures include A1 uses such as opticians and travel agents etc.

[2] Based on the UK average, 100 being the average proportion of floorspace or number of units for certain categories of use in a UK town, not including markets.

[3] These values relate to the zone A rent for a modern standard sized shop unit (6.1m frontage, 18.3m depth and 30sq.m. of storage or staff accommodation, and a full insuring and repairing lease). The assessment date is May of each year.

[4] Regional averages relate to Yorkshire and Humberside.

[5] ‘All risk yields’ are calculated by dividing the annual rent as though it had been received as a single sum at the year end, by the capital value or sale price of the property. This is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. Values from April of each year.

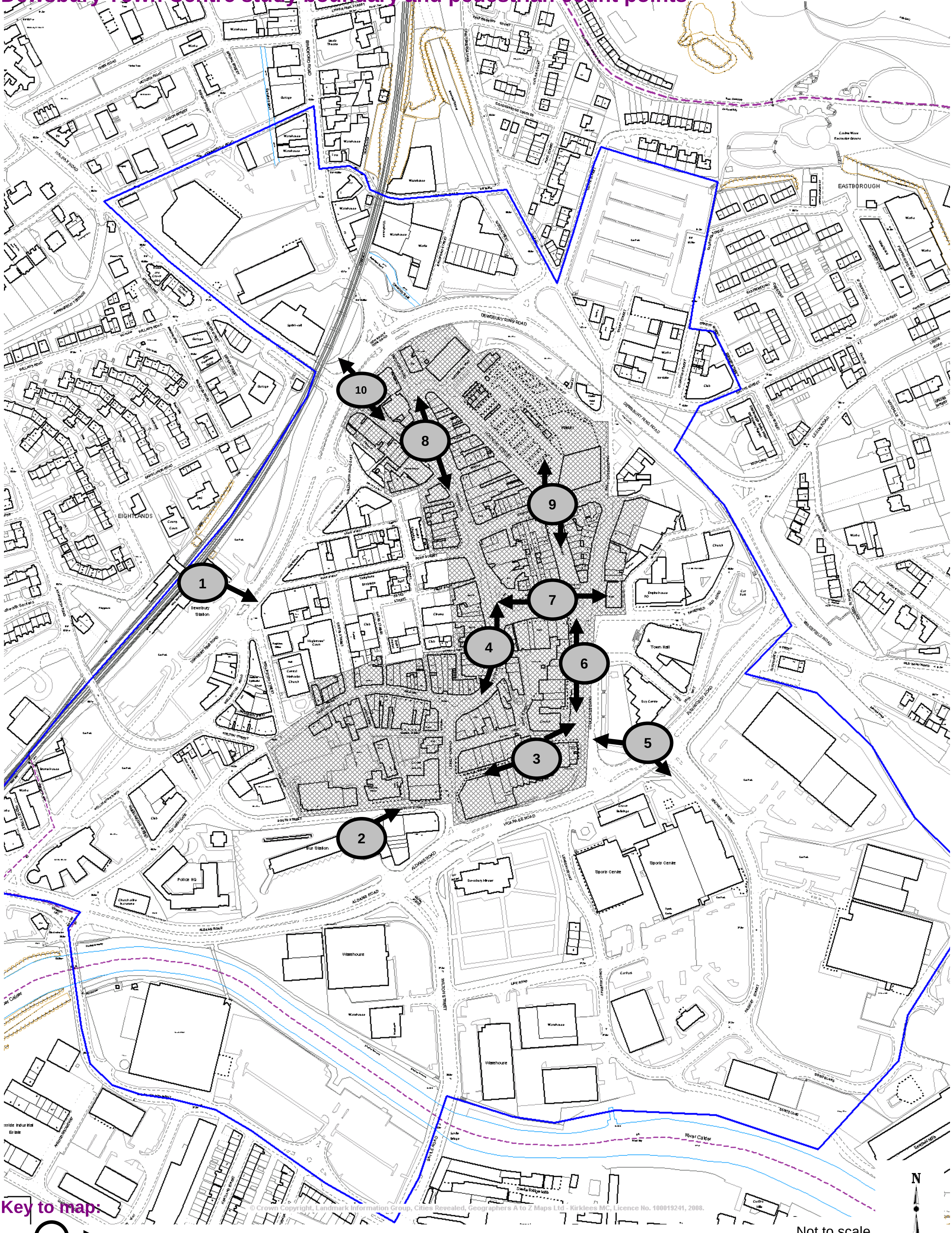
Pioneer House, Halifax Road

This document has been produced by:

The Town Centres Team, Planning Services, Kirklees Council, P.O.Box B93, Civic Centre III, Huddersfield , HD1 2JR
Tel: 01484 221629 Fax: 01484 221613 E-mail: sarah.smith@kirklees.gov.uk

Website: www.kirklees.gov.uk/towncentres

Dewsbury Town Centre study boundary and pedestrian count points



Not to scale

Key to map:

Count point direction

Study Boundary

Main Shopping Area

1. Train station
2. Bus Station
3. The Princess of Wales Precinct
4. Westgate
5. Subway
6. Longcauseway
7. Market Place
8. Northgate
9. Foundry St/Corporation St.
10. Halifax Road