



HECKMONDWIKE TOWN CENTRE ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS SEPTEMBER 2003

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 6 years have been examined in annual statements of key economic indicators, of which this is the sixth. The indicators of vitality and viability covered here are:

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

FLOORSPACE, SHOP UNITS AND VACANCY

A survey of occupancy updated in July 2003 recorded that Heckmondwike town centre provides a total of 11,429 sq.m. (122,980 sq.ft.) of net retail floorspace and 162 shop or service units. Figures 1 and 2 illustrate the changes in both retail floorspace and shop unit occupancy since 1999.

Figure 1: Heckmondwike shop unit statistics

| | Convenience | Comparison ¹ | Service | Vacant | TOTAL |
|------------------|--------------|-------------------------|---------------|---------------|---------------|
| 1999 | 10 (6.0%) | 81 (48.5%) | 45 (26.9%) | 31 (18.6%) | 167 (100%) |
| 2000 | 11 (6.7%) | 75 (45.7%) | 46 (28.0%) | 32 (19.6%) | 164 (100%) |
| 2001 | 11 (6.7%) | 82 (50.0%) | 45 (27.4%) | 26 (15.9%) | 164 (100%) |
| 2002 | 11 (6.7%) | 80 (48.5%) | 42 (25.4%) | 32 (19.4%) | 165 (100%) |
| 2003 | 9 (5.6%) | 74 (45.7%) | 44 (27.1%) | 35 (21.6%) | 162 (100%) |
| % change 2002-03 | -18.2 | -7.5 | +4.8 | +9.4 | -1.8 |

A decline in the number of convenience goods units in Heckmondwike has been recorded since the 2002 assessment. This is due to the closure of both a butcher from Blanket Hall Street and the 'Factory Foods' outlet from Market Street. The latter unit is now occupied by the re-located post office. The continued vacancy of units within the Northgate redevelopment and the closure of a number of other units in the town has resulted in high unit and

floorspace vacancy rates – both of which are well above the national average. Long term vacancy remains a particular concern in Heckmondwike.

Figure 2: Heckmondwike floorspace statistics (sq.m. net)

| | Convenience | Comparison | Vacant | TOTAL |
|-------------------|------------------|------------------|------------------|------------------|
| 1999 | 4,270 (33.6%) | 6,444 (50.7%) | 1,990 (15.7%) | 12,704 (100%) |
| 2000 | 4,255 (41.5%) | 4,562 (44.5%) | 1,443 (14.0%) | 10,260 (100%) |
| 2001 | 5,068 (43.1%) | 5,214 (44.4%) | 1,469 (12.5%) | 11,751 (100%) |
| 2002 | 5,068 (42.7%) | 5,264 (44.3%) | 1,538 (13%) | 11,870 (100%) |
| 2003 | 4,896 (42.8%) | 4,892 (42.8%) | 1,641 (14.4%) | 11,429 (100%) |
| % change 2002- 03 | -3.4 | -7.1 | +6.7 | -3.7 |

Figure 3 shows Heckmondwike's occupancy statistics in relation to those of nearby towns. The town has the highest proportion of convenience floorspace of the centres shown due to the presence of Morrisons. It also has the highest vacancy rate in terms of unit numbers.

Figure 3: Comparisons² with nearby towns (sq.m. net)

| | Heck'wike | Batley | Cleckheaton | Dewsbury | Holmfirth |
|-------------------------|------------------|------------------|-----------------|------------------|-----------------|
| Convenience | 4,896 42.8% | 4,479 19.4% | 1,629 20.0% | 10,134 22.2% | 1,834 26.8% |
| Comparison | 4,892 42.8% | 15,652 68.0% | 5,315 65.3% | 30,294 66.2% | 4,096 59.9% |
| Vacant | 1,641 14.4% | 2,904 12.6% | 1,196 14.7% | 5,296 11.6% | 913 13.3% |
| Total retail floorspace | 11,429 (100%) | 23,035 (100%) | 8,140 (100%) | 45,724 (100%) | 6,843 (100%) |
| Vacant units | 35 21.6% | 30 14.0% | 17 10.0% | 70 20.0% | 13 8.1% |
| Total no. of units | 162 (100%) | 214 (100%) | 170 (100%) | 351 (100%) | 160 (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

¹ Including semi-retail uses e.g. travel agents, opticians.

² Figures relate to the floorspace contained within the Town Centre Audit Study Boundary of each centre at the most recent published survey date.

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 4 gives the summer 2003 pedestrian count results and the changes recorded since the last assessment.

Figure 4: Heckmondwike pedestrian numbers 2002-03³

| | | 2002 | 2003 | % change |
|-------------------------------|------|-------------|-------------|--------------|
| Market day | a.m. | 1619 | 1812 | +11.9 |
| | p.m. | 1027 | 943 | -8.2 |
| Non-market day | a.m. | 1295 | 1307 | +0.9 |
| | p.m. | 810 | 1151 | +42.1 |
| Saturday | a.m. | 1488 | 1597 | +7.3 |
| | p.m. | 1239 | 1464 | +18.2 |
| TOTAL (into town only) | | 7478 | 8274 | +10.6 |

Overall, Heckmondwike pedestrian numbers are 10.6% higher than those recorded 12 months ago. Much of this improvement occurred on both non-market day and Saturday afternoon counts, perhaps partly affected by the excellent weather conditions (hot and sunny). Figure 5 clearly shows steady increases in pedestrian numbers on both weekday assessments since 2000. Full occupancy of shop units in the Northgate redevelopment scheme is likely to see a further improvement in shopper numbers in this part of the town. Since its construction in 2000, pedestrian activity recorded on Northgate has steadily grown.

Figure 5: The pattern of footfall 1997 – 2003

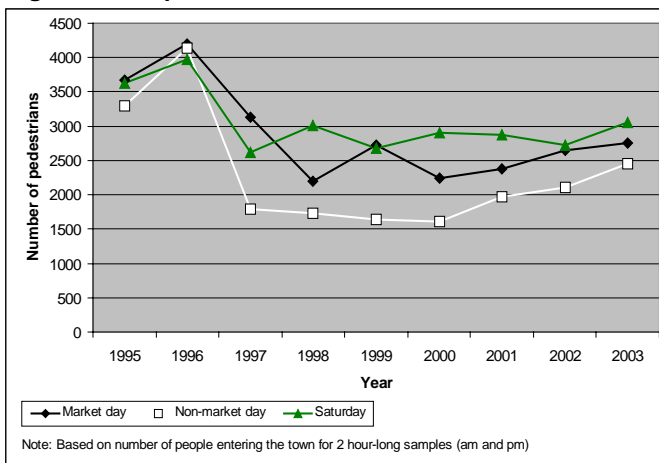
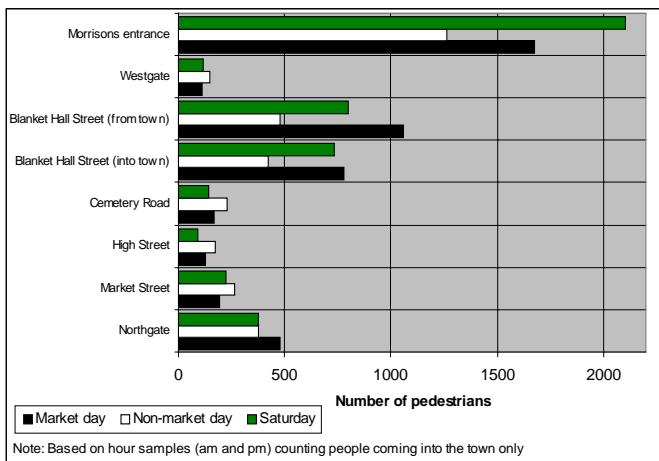


Figure 6: Pedestrian numbers by street⁴ (summer 2003)



³ 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 count points.

⁴ All count points record pedestrians coming INTO the town only, unless otherwise stated.

The influence of the covered market is clearly evident in Figure 6 which shows the higher numbers recorded in particular on Blanket Hall Street for market days compared to non-market days.

RETAIL DEVELOPMENT IN THE PIPELINE

With the exception of changes to shop fronts and minor refurbishment works, there has been little retail development in Heckmondwike during the last 12 months. Furthermore, there are no outstanding planning permissions recorded in the town.

The post office has recently re-located from Northgate back to its original site on Market Street. The move will assist in strengthening this part of the town centre which, in terms of shopper activity, is comparatively quiet.

RETAILER DEMAND

An assessment of retailer demand was undertaken in September 2003. This identified that there is only 1 registered requirement for representation in Heckmondwike town centre. This is from a public house operator wishing to secure a unit of 560 sq.m. (6,000sq.ft) maximum. However, it is important to note that there may be other retailers who have a requirement for Heckmondwike but have not yet registered their interest.

Below: Heckmondwike town centre views



PRIME RETAIL RENTAL LEVELS

Prime retail rents have remained constant over the past 12 months with the Morrisons shop units development continuing 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.).

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