

HECKMONDWIKE 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 Heckmondwike 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 in Heckmondwike was undertaken in July. Within the study boundary – approximately defined by Morrisons supermarket and Algernon Firth Park to the west, McDonalds and Albion Street to the north, the disused railway line to the east, and the library and Station Road to the south – there is around 10,800sq.m of net retail floorspace. Occupied floorspace is fairly evenly split with around 40% given over to comparison goods (non-food) traders and a further 45% in convenience (food) goods. There are currently a total of 150 shop units accommodating 74 retail uses and 43 service related businesses. The remaining 33 units were vacant at the time of the survey. Figure 1 gives the breakdown of sales floorspace and shop units in the town and shows the changes in these proportions since last year.

Figure 1: Heckmondwike 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)	4,776 (42.0%)	8 (5.0%)	4,914 (45.2%)	9 (6.0%)	+2.9	+12.5
Comparison (non-food)	5,091 (44.8%)	70 (43.8%)	4,636 (42.6%)	65 (43.3%)	-8.9	-7.1
Service	N/A	47 (29.4%)	N/A	43 (28.7%)	N/A	-8.5
Vacant	1,508 (13.2%)	35 (21.8%)	1,333 (12.2%)	33 (22.0%)	-11.6	-5.7
TOTAL	11,375 (100%)	160 (100%)	10,883 (100%)	150 (100%)	-4.3	-6.3

It is evident that both comparison goods trading floorspace and the level of vacant floorspace have dropped during the last 12 months. In terms of comparison goods, this represents a loss of 5 shop units into either vacancy, convenience goods trading, service use or conversion to residential. The drop

in vacant floorspace is principally due to the opening of Fultons in Market Place which removes a sizeable unit from the vacancy list. Long-term vacancy however, particularly of smaller units in peripheral locations, remains a problem. Heckmondwike continues to exhibit the highest unit vacancy rate in the District (see Figure 2).

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

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

Figure 2 illustrates the proportions of shop unit and floorspace occupancy in other Kirklees towns. This shows that Holmfirth has the lowest unit vacancy rate, closely followed by Batley. In percentage terms, floorspace vacancy is currently highest in Cleckheaton. Heckmondwike exhibits the biggest proportion of convenience goods floorspace due to the presence of a Morrisons supermarket within the town centre. Figure 2 also indicates a level of investment and confidence in Cleckheaton and Holmfirth town centres where units have been recorded as under refurbishment.

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 around the town including key access points, the entrance to Morrisons and the pedestrian links from the foodstore to the rest of the shopping area. Morning and afternoon hour-sample surveys are undertaken on two weekdays (market day and non-market day) and a Saturday. Figure 3 shows the overall numbers of people recorded coming into the town at these locations over the three survey days during the 2006 counts compared to previous years.

Figure 3: Heckmondwike pedestrian numbers 2004-06²

		2004	2005	2006	% change (05-06)
Market day	a.m.	1436	1510	1307	-13.4
	p.m.	1093	1059	883	-16.6
Non-market day	a.m.	1231	1188	1305	+9.8
	p.m.	1169	1131	1060	-6.3
Saturday	a.m.	1830	1606	1586	-1.2
	p.m.	1229	1118	1477	+32.1
TOTAL (into town only)		7988	7612	7618	0

Overall, there has been no change in the total numbers of people recorded coming into Heckmondwike since last year's assessment. However, this overall trend is masking more significant changes on a day to day basis. The market day count shows around 15% less people visited the town

during this year's assessment. On the non-market weekday, an increase in numbers was recorded during the morning with losses noted during the afternoon. Perhaps most significantly, the Saturday survey saw over 30% more people entering the town during the afternoon than the previous year – perhaps due to the exceptionally good weather on the day.

Figure 4 illustrates the changes in footfall levels in the town since 1997. It clearly shows that non-market days have been relatively static since 2003 following a period of growth in the preceding 3 years. Market day shows slight fluctuations during the last 5 years with a drop recorded this year.

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.

Conversely, the Saturday assessments show slight fluctuation through from 1997 to 2006 with the most recent year recording an upward trend.

Figure 4: The pattern of footfall 1997 - 2006

The street by street pattern of pedestrian activity in the town is shown in Figure 5. This clearly illustrates the strength of draw from the Morrisons supermarket and also the consistency of the pedestrian link from the store to the rest of the town via Blanket Hall Street. The graph also indicates the trend in numbers since last year (up, static or down). Market Street and Northgate are particularly well used access routes into Heckmondwike – perhaps influenced by the presence of a number of bus stops for those arriving by public transport.

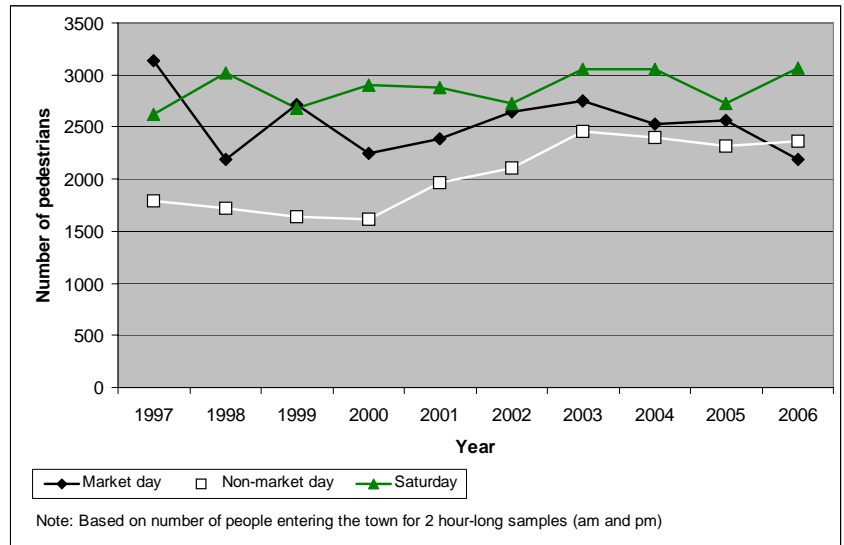
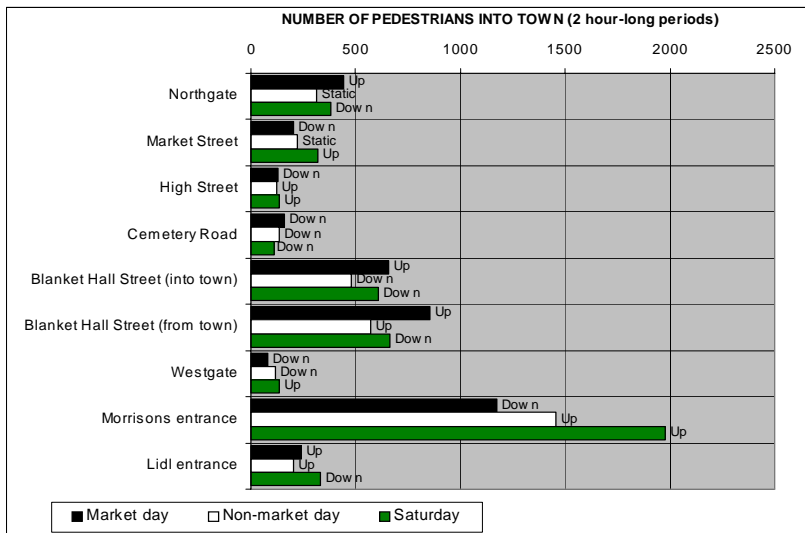


Figure 5: Street by street pedestrian numbers 2006



DEVELOPMENT AND INVESTMENT ACTIVITY

There has been little development or investment in the retail function of Heckmondwike during the last 12 months. However, there are 2 new 'big name' retailers that have recently taken premises in the town – Rowlands have taken over the pharmacy on Greenside, and Jack Fulton have opened a new shop in Market Place. A further 5 independent retailers have either re-located from existing premises within the centre or have taken units as newcomers. This activity does indicate a sustained level of investor interest in the town as a shopping destination.

Other development in the town is mostly residential in nature. Five new apartments have been created on Cemetery Road from the conversion of a former shop and upper floor storage; and Haslam Homes have completed a scheme to build 69 dwellings just off Station Lane to the south of the town centre. Other schemes located within the study boundary of the town which have been granted permission during the last 12 months include the redevelopment of the Railway Hotel on Railway Street for residential use; a development of 24 dwellings on the former railway cutting off High Street; and the construction of 14 apartments on the site of the former Inspan Works on Walkley Lane.



Memorial Park

Further investment in Heckmondwike in the next couple of years includes development proposals for the war memorial park 'The Green' - bordered by Northgate and Westgate. This will provide an outdoor events space as well and a new band stand, planting and gateway feature. In addition, the town is one of 3 to receive funding for a variety of improvement projects under the Council's Local Public Service Agreement (LPSA). This will result in street furniture, paving and lighting improvements along with public art features and enhancements to the indoor market space, during the next 2 years.

RETAILER DEMAND

An assessment of demand for retail and leisure business premises in Heckmondwike was undertaken in September 2006. Last year, there were no recorded requests for representation in the town. This year, the survey revealed that there are 2 registered interests – both from restaurant/take-away uses that would be new to the town. They require either prime pitch units or prominent, busy main road frontages. It should be noted that this assessment does not include demand for commercial/office premises or from businesses that have an unregistered requirement.

The town has been actively promoted to potential investors/businesses during the last 12 months as part of the Council's LPSA initiatives. Portfolios detailing the current economic health and benefits of the town have been marketed to retail and leisure companies that have expressed interest in similar towns elsewhere.

PRIME RETAIL RENTAL LEVELS

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 Heckmondwike peak at around £269 per sq.m, achieved by the retail units adjacent to Morrisons. Despite regional growth, this figure has remained static during the last 12 months.

Within the more traditional retail area of the town, zone A rental levels achieve a maximum of around £194 per sq.m. which also remains unchanged from last year.



Heckmondwike weekday market

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