Produced by:

The Town Centres Team
Planning Services
Kirklees M.C.
P.O. Box B93
Civic Centre III
Off Market Street
Huddersfield
HD1 2JR

Tel: 01484 221628
Fax: 01484 221613
Email: carol.dean@kirklees.gov.uk

BATLEY TOWN CENTRE AUDIT 2004

FACT SHEET 3: RETAIL ACTIVITY AND MOVEMENT

Introduction

This document, produced by Kirklees MC's Planning Service, is designed to provide supplementary information on retail floorspace and shop units, vacancy rates, national multiple representation and floorspace take up, to accompany the 2004 Town Centre Audit for Batley (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.

Retail floorspace, shop units and vacancy

The floorspace and occupancy survey for October 2003 revealed that Batley town centre provides 24,265 sq.m. (261,094 sq.ft.) of net retail floorspace. 67% of this is devoted to comparison goods retailing, rising to 76% within the prime pitch of the town. A further 25% of the town's floorspace is devoted to convenience goods traders. Figures 1 and 2 show the changes in retail floorspace and shop unit numbers since 2000.

Figure 1: Retail floorspace (net sq.m.)

	Convenience	Comparison[1]	Vacant	TOTAL
2000	4,722 (20.3%)	15,653 (67.3%)	2,880 (12.4%)	**23,255 (100%)**
2001	4,690 (20.6%)	15,636 (68.7%)	2,422 (10.7%)	**22,748 (100%)**
2002	4,479 (19.4%)	15,652 (68.0%)	2,904 (12.6%)	**23,035 (100%)**
2003	6,145 (25.3%)	16,226 (66.9%)	1,893 (7.8%)	**24,265 (100%)**
% change 2002 - 03	**+37.2**	**+3.7**	**-34.8**	**+5.3**

Figure 2: Number of shop units

	Convenience	Comparison[1]	Service	Vacant	TOTAL
2000	26 (12.4%)	115 (55.0%)	44 (21.1%)	24 (11.5%)	**209 (100%)**
2001	24 (11.5%)	115 (55%)	46 (22.0%)	24 (11.5%)	**209 (100%)**
2002	20 (9.3%)	120 (56.1%)	44 (20.6%)	30 (14.0%)	**214 (100%)**
2003	19 (9.4%)	116 (57.4%)	44 (21.8%)	23 (11.4%)	**202 (100%)**
% change 2002 - 03	**-5.0**	**-3.3**	**0**	**-23.3**	**-5.6**

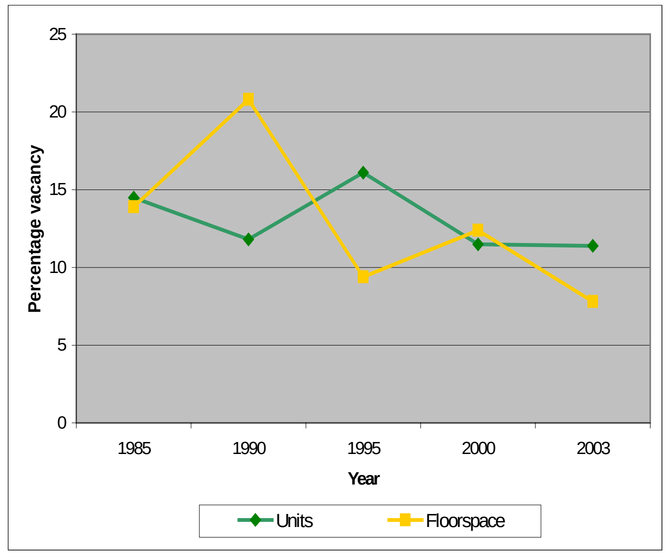
[1] Comparison goods figures include A1 uses such as opticians and travel agents etc.

The proportion of vacant floorspace and shop units within Batley has fallen dramatically over the past 12 months (by 34.8% and 23.3%, respectively). This is largely a result of the demolition of a number of vacant units in Alfreds Way, which form part of the new Tesco redevelopment. Batley currently exhibits its lowest vacancy rates (in terms of both floorspace and shop units) for the last 20 years. This is illustrated in Figure 3 below.

Alfreds Way: Vacant units replaced by glazed elevation

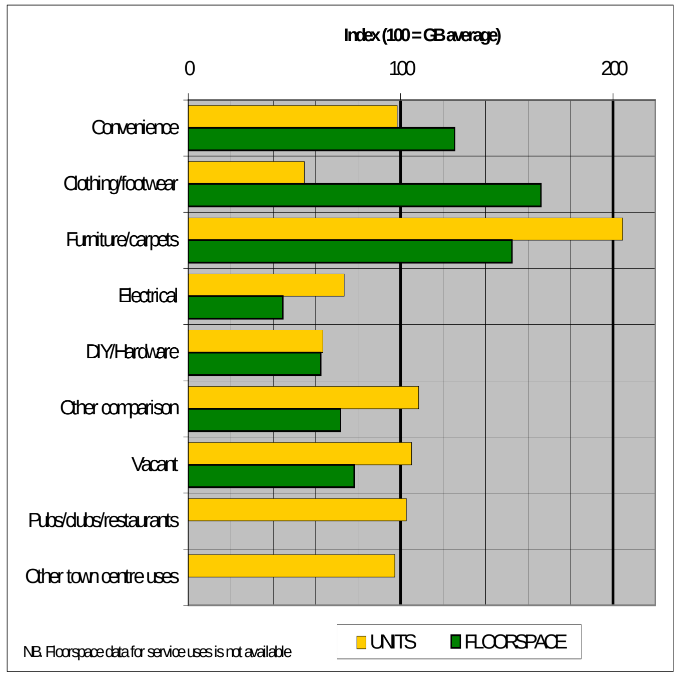
The large rise in convenience goods floorspace (+37.2%) can be attributed to the opening of the new Tesco store in September 2003, providing approximately 5,500 sq.m. (59,000 sq.ft.) of net retail floorspace. The new store provides an additional 2,400sq.m. (25,500sq.ft.) of net retail floorspace compared to the old Commercial Street store and has increased its sales area for food goods from 1,600sq.m. to approximately 3,250 sq.m.

Figure 3: Batley town centre vacancy rates since 1985



Service use occupancy (which includes banks, building societies, estate agents, restaurants, cafes etc) has remained relatively constant over the last 5 years, fluctuating between 20.5% and 22% of all shop units in the town. Generally speaking, the proportion is slightly less than other towns of a comparable size. For example, Heckmondwike, Cleckheaton and Dewsbury exhibit service use occupancy of 27.1%, 27.1% and 23.2%, respectively. Batley's primary shopping area records a much lower level of service use occupancy (just 14%).

Figure 4: Retail floorspace and shop units: comparison with the national average (GB average indexed to 100)



As Figure 4 shows, there is a high representation of retail floorspace and shop units devoted to furniture/carpet sales, compared to the national average. Floorspace occupied by clothing/footwear retailers is also well above the national average. These trends reflect the contribution of the Mill Discount Department Store and Jessops Mill which compensate for an otherwise weak offer of such goods within the town.

Figure 5: Floorspace comparisons (sq.m.)

	Batley	Dewsbury	Heck'wike	Cleckheaton
Convenience	6,145 (25.3%)	10,134 (22.2%)	4,896 (42.8%)	1,629 (20.0%)
Comparison*	16,226 (66.9%)	30,294 (66.2%)	4,892 (42.8%)	5,315 (65.3%)
Vacant	1,893 (7.8%)	5,296 (11.6%)	1,641 (14.4%)	1,196 (14.7%)
Total retail floorspace	**24,265 (100%)**	**45,724 (100%)**	**11,429 (100%)**	**8,140 (100%)**
Vacant units	23 (11.4%)	70 (20.0%)	35 (21.6%)	17 (10.0%)
Total number of units	**202 (100%)**	**351 (100%)**	**162 (100%)**	**170 (100%)**

*Comparison floorspace figure also includes A1 uses such as travel agents, optician's etc.

In terms of convenience goods floorspace, Batley now shows a representation similar to that of the national average as a result of the new Tesco store. The number of convenience units is on a par with the national average.

There is a below average proportion of electrical goods and DIY/hardware floorspace and units within the town. However, most categories of use in terms of unit numbers are close to the national average.

In terms of other small centres in the District (Figure 5), Batley exhibits a proportion of comparison goods floorspace that is higher than Dewsbury, Heckmondwike and Cleckheaton. Furthermore, the town has a much lower vacancy rate in terms of both floorspace and number of units. The proportion of convenience goods floorspace is greater than that in Dewsbury or Cleckheaton, reflecting the contribution of the Tesco store to the retail make-up of Batley town centre. However, it falls well below the 42.8% recorded for Heckmondwike town centre, which is largely attributable to the presence of Morrisons foodstore.

DIY Stores in Batley town centre

A large proportion of the comparison goods retailing in the town centre is provided by the Mill Discount Department Store on Bradford Road. This development is home to a number of national retailers and well known brand names which have made important qualitative and quantitative improvements to the town's retail offer.

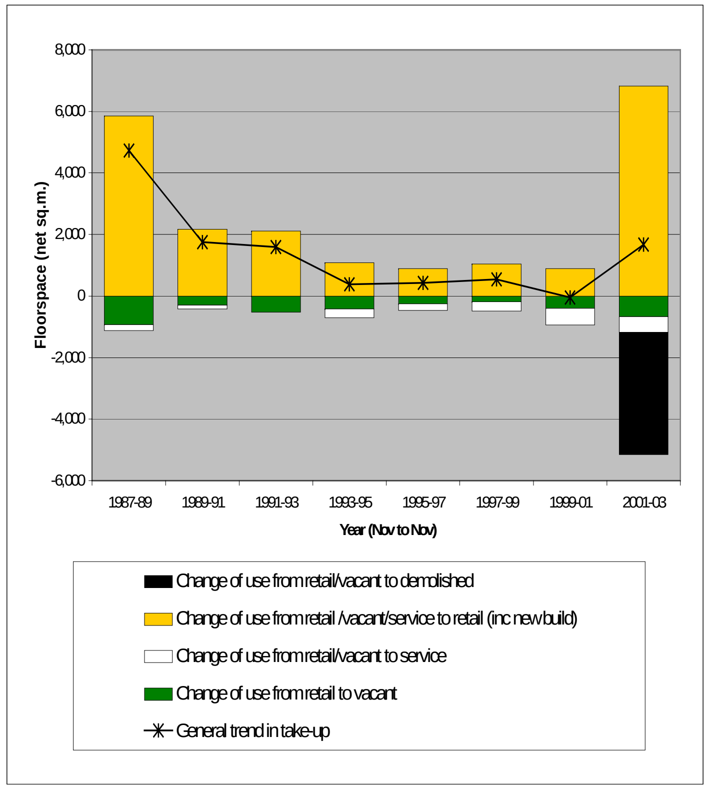
Take up of retail floorspace

Figure 6 quantifies the take up of retail floorspace since 1987 giving a detailed assessment of changes between retail occupancy, service use occupancy and vacancy.

The 2001-03 period shows a great deal of activity, especially in terms of changes to retail and the demolition of floorspace. This can be accounted for by the construction of the new Tesco Extra store and the loss of the old store from Commercial Street, and the demolition of some units on Alfreds Way. Development and investment by Tesco also accounts for the large scale of activity registered in the 1987-89 period. It was during this time that the company moved into its Commercial Street premises (previously owned by Hillards).

The 1989-91 period shows some level of activity as a result of Netto opening on Bradford Road. This was followed in the 1991-93 period by the opening of Aldi and Iceland stores. The period between 1993 and 2001 saw a decrease in activity within the town, with floorspace take-up resulting from smaller changes of use such as the opening of the Pricewise warehouse. The major activity recorded in 2001-2003 may be proceeded by further changes on a smaller scale over the next 18 months, especially in terms of increased retail take-up, as the Tesco Extra development is likely to act as a catalyst for further investment in the town.

Figure 6: The pattern of floorspace take-up since 1987 (excluding the Mill Discount Department Store)



The exercise of monitoring floorspace take-up has excluded the Mill Discount Department Store on Bradford Road, largely because many of the retailers within this complex have been regularly 'moved around' by the previous owners. If all these movements were recorded it would give an unrealistic picture of retail activity. Occupants at the Mill are recorded separately and compared year on year. The total floorspace of the Mill since 2000 is shown below:

2000	9,200 sq.m. net
2001	7,850 sq.m. net
2002	7,635 sq.m. net
2003	7,400 sq.m. net

The Mill Discount Department Store

The decrease in floorspace recorded between 2000 and 2001 resulted from demolition works on the site. Subsequent changes have been smaller in scale and reflect the adjustments in occupancy and layout within the complex. In 2003 there was 7,400sq.m. of retail sales floorspace. In this same year, the Mill was purchased by Modus and this change in ownership is likely to lead to a further reassessment of the layout and occupancy of these buildings over the next 2/3 years.

Tesco 'Extra'

National multiple traders

Batley's prime pitch encompasses No.'s 60-84 and 69-97 Commercial Street. These frontages provide a relatively attractive shopping environment, with high pedestrian footfall and a strong representation of national multiple retailers. Some 50% of shop units within this prime frontage are occupied by multiple retailers, compared to 30% in the shopping area as a whole (including The Mill Discount Department Store).

Figure 7: Units occupied by national multiples in Batley*

	1999	2003
Prime Pitch	10	10
Elsewhere in study boundary	12	29
Town Total	22	39

*Based upon occupied retail units only, excluding national charity shops. Assessment undertaken after opening of new Tesco.

Figure 7 shows the numbers of national multiples represented in Batley town centre. The number of multiples present in the town as a whole has increased since 1999, largely as a result of the sub-division of floorspace within the Mill Discount Department Store on Bradford Road to accommodate more high street brand names.

Multiple retailers within the town include Tesco, Woolworths, Boots, Iceland, Superdrug, Greggs, Klick, Ponden Mill, Skopos, Birthdays, Lunn Poly and Netto, amongst others.

The new Tesco store on Bradford Road, whilst itself representing the relocation of an existing national multiple in the town, is likely to act as a catalyst for future development and investment in the town centre. This may lead to a greater number of national multiples locating in Batley in the future and has already boosted the number of retailers wishing to secure representation in the town (see Retailer Demand - Fact Sheet 4).