

Differences are noted in turnover per employee ratios between the traditional town centre and the wider town centre. Ratios for most of the retail sub sectors are greater in the wider town centre, largely due to the influence of the Mill Discount Department Store.

Turnover per employee by retail sector

Retail Sector	Turnover per employee (£)	
	1998	Aug 2003
Convenience	102,918	132,910
Comparison	58,014	67,937
Clothing/footwear	56,375	84,238
Furniture/carpets	58,036	58,070
Electrical goods	74,215	49,536
D.I.Y./Hardware	46,857	40,882
Mixed Goods	69,013	99,542
Other comparison	44,105	52,946

Employment patterns in the town reflect the general pattern of shop unit occupancy, in that Batley town centre continues to have a predominance of small retailers, where 147 (94%) of the retail companies in the town employ 10 people or less

(full and part time employees). However, following the new Tesco redevelopment, some 40% of all those working in the retail sector are employed by just 5 companies. These are:

Tesco Netto Aldi
Readmans Iceland

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 Batley, principally because employment details were not provided by all town centre businesses (August 2003 Business Questionnaire Survey). Nevertheless, a general guide to the ratio of full time to part time employees, and of male to female employees in Batley town centre has been obtained. This revealed that, of those who responded:

- 38% of employees are in full time work, with 62% in part time work;
- Female employment accounts for 67.5% of all employee numbers in the town centre (full and part time);
- 61% of all full time employees are female, with male full time employees accounting for 39% of jobs;
- 71% or nearly 3 out of every 4 part time employees are female, with male employees accounting for only 29% of part time jobs, and
- 22% of employees are from an ethnic minority background.

Definition of terms:

Prime zone A retail rent: This is the rent charged for the most valuable space within a retail unit. The rent (expressed in both pounds per sq.ft. and pounds per sq.m.), relates to the area of the retail unit which is used to attract the shopper into the premises. This is usually taken to mean a depth of 20ft (6m) from the frontage of the unit. The values relate to the zone A rent for a hypothetical standard shop unit in the best (100%) pitch within each centre.

Although every care and effort has been taken to ensure the accuracy of the data and statements contained in this publication, Planning Services does not accept responsibility for any errors or inaccuracies which may have occurred therein.

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BATLEY TOWN CENTRE AUDIT 2004 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 2003 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.

Retailer demand

A general assessment of retailer demand was undertaken in April 2003. This revealed that there is an unsatisfied requirement for representation in Batley. The table below shows the fluctuation in the level of retailer demand since 1998.

Changes in retailer demand 1998 – 2003

Number of requirements	Year
7	2003
5	2002
8	2001
8	2000
5	1999
3	1998

Source: Property Intelligence PLC / KMC

As at April 2003, 7 retailers had registered an interest for representation in Batley, equating to **3,624 sq.m. (39,000 sq.ft.)** gross floorspace. This represents an increase on the previous year's figures, and is partly attributable to Tesco's recent investment in the town centre which has seen the construction of a new Tesco 'Extra' store and the refurbishment of Alfreds Way. Demand is mainly from clothing retailers and pubs/restaurants. There is currently no recorded demand from any convenience retailers, which is a reflection of the presence of foodstores already in the town centre, such as Aldi, Iceland, Netto and Tesco.

It is important to note that 6 interests (totalling 3,299 sq.m.) wish to secure premises within the town centre, and only 1 is seeking an edge of centre location. **All** of the of the registered interests would be new to the town.

Retailer requirements

Category of use	Number of registered interests	Max. sales area requirements sq.m. (sq.ft.)
Clothing/footwear	2	1,625 (17,500)
Restaurants/pubs	2	1,255 (13,500)
Other comparison	2	605 (6,500)
Services	1	139 (1,500)
TOTAL	7	3,624 (39,000)

Source: Property Intelligence PLC/KMC

This list of interests should not be treated as definitive. There are likely to be other retailers who have a requirement for representation in Batley 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.



Glazed frontage to Alfreds Way

Development opportunities

This section briefly identifies the development opportunities both within and immediately adjoining Batley town centre. However, it is worth noting that there has already been large-scale development in Batley town centre over the last 4 years, including the following:

- 1) A new £20 million Tesco development on Bradford Road including the demolition of the old Tesco store on Commercial Street and some vacant units on Alfreds Way. A bridge link between the new Tesco store and Commercial Street is planned for early 2004.
- 2) The £750,000 refurbishment of the Union Rooms (former bank) on Hick Lane to provide a public house.
- 3) The Mill Village was bought in 2003 for around £12 million. Previously, there had been £7.5 million spent on refurbishing the Mill complex, which re-opened in 2000.

The following list of development opportunities is by no means exhaustive and clearly other sites may come forward following land assembly. However, as at November 2003, these sites made up the known development opportunities amounting to some 14.53 hectares (5.88 acres).

Blakeridge Mills, Mayman Lane. The Blakeridge complex comprises 6 main buildings accommodating 28,350 sq.m. (305,000 sq.ft.) gross floorspace. Located outside the traditional town centre, the site provides a number of development opportunities particularly industry or housing. The consultants report 'Batley Mills Town UK' (1998), commissioned by Batley Action Ltd during its final year concluded that Blakeridge Mills could become a brownfield

'urban village' with conversion of existing frontage buildings for residential on upper floors and substantial new build housing around. Ancillary activities to support the 'urban village' would be possible, although the nature and scale of support services would need careful consideration. Nevertheless, leisure uses are a possible option mix.

Site area approximately 10.63 acres (4.3 ha).

Bus Station, St. James Street. The existing bus station occupies an open, visually unattractive site in the town centre. The bus station remains an uninviting place, and significant improvements are required to bring it up to an acceptable standard in terms of amenity, environment and function. In this respect, planning permission has recently been granted for the redevelopment of this site to provide a new bus station with 6 bus waiting bays, a retail unit and an undercover waiting area. Site area approximately 0.84 acres (0.34 ha)

Europa Beds, Hick Lane. This building has remained vacant for the past few years. It represents an investment opportunity located within Batley town centre, just 100 metres from the Primary Shopping Area. There have been a number of development enquiries for this site, which relate to both residential and retail conversion/redevelopment. Site area approximately 0.59 acres (0.24ha).

Well Lane/Bradford Road area. A flexible approach to the use of land and buildings in and around Well Lane and Bradford Road is advocated in order to strengthen the link between the Mill Discount Village and the traditional Town Centre. The eastern end of the town centre is weak in terms of pedestrian activity, as there are few shopper 'attractions' in this area. The introduction of a broader range of uses such as leisure, commerce, entertainment and retailing will go some way towards improving the quality and diversity of facilities currently available in the town centre. Notwithstanding the above, these new uses will need to satisfy highway requirements. Site Area approximately 2.22 acres (0.9ha).

Soothill Lane/Station Road. Planning permission was granted in 1997 for the refurbishment of this prominent Grade II listed former rag warehouse to provide a mix of retail, commercial offices, leisure and exhibition space. Some 1,300 sq.m. (14,000 sq.ft.) gross of floorspace was to be provided, although work has yet to start. More recently, residential conversion has been considered. Site Area approximately 0.25 acres (0.1ha)



Blakeridge Mills, Mayman Lane

Prime retail rental levels

Average prime zone A retail rents in Great Britain experienced an increase of 2.9% during the 12 months to June 2003. This is a

slower rate of growth than the 4.1% experienced in the previous 12 months.

Yorkshire and Humberside secured a 2.4% growth in prime retail rents over the same period. This represents a decline on the previous year's performance, which recorded a growth of 3.5%. Since 1990, the region has seen prime rents rise by just over 54%. This is well above the 39% 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.), which has now moved to £2,583 per sq.m. (£240 per sq.ft.). Meadowhall currently operates with a prime retail rent of £4,306 per sq.m. (£400 per sq.ft.).

The table illustrates the difference in prime zone A retail rents across a broad range of shopping centres in West Yorkshire. At the regional level, Leeds has the highest zone A rent. At the sub-regional level, Huddersfield achieved £1,130 per sq.m. (£105 per sq.ft.). At the local level, Batley town centre has a proven Zone A retail rent of £269 per sq.m. (£25 per sq.ft.). This was achieved in 1997 and since then there has been no change. However, recent activity following the marketing of a number of vacant shop premises on Commercial Street indicates that a prime Zone A retail rent of around £323 per sq.m. (£30 per sq.ft.) could be achieved in the coming months. This is partly attributable to the level of development activity in the town and the draw of the new Tesco 'Extra' store.

Prime Zone A retail rents of selected towns (£ per sq.m.)

Centre	1999	2003	% change in prime rent 1999-2003
Batley	269	269	0
Cleckheaton	194	215	+10.8
Brighouse	323	377	+16.7
Heckmondwike	204	269	+31.9
Dewsbury	484	538	+11.1
Leeds	2153	2905	+34.9
Morley	377	377	0
Pudsey	269	269	0
Huddersfield	969	1130	+16.6
Yorkshire and Humberside	1173	1345	+14.7
Great Britain Average	1023	1164	+13.8

Retail employment

In June 2003 the retail sector of Great Britain employed 2,759,000 people (full and part time), or 10.7% of the country's workforce. Of these, 1,634,300 people or 59.2% were working on a part time basis. Nationally there is a heavy bias towards female employment in the retail sector, which accounts for 76% of all part time jobs and, 47% of all full time jobs.

Prior to the opening of the new Tesco 'Extra' store in September 2003, the retail sector in Batley town centre employed 865 people (including the Mill Discount Department Store). Of these, 29% were employed in convenience goods retailing, 61% in comparison goods retailing, and 10% in personal retail services. Following the new store's opening,

retail employee numbers increased by 160 to 1,025. This represents an 8.7% increase since 1998.

Employee densities (expressed in terms of employees per '000 sq.m.) have been obtained for each retail sector. As observed in the 1998 audit, 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.



Convenience goods retailing in the town centre

Pre Tesco redevelopment, on average 34 employees per '000 sq.m. (3.2 per '000 sq.ft.) of net retail floorspace worked in the comparison goods retail sector of Batley town centre. This represented a fall of 11% since 1998. However since Tesco opened, the average employee density has increased to 38 per '000 sq.m. (3.6 per '000 sq.ft.). This figure is still lower than Huddersfield, Dewsbury, Heckmondwike and Cleckheaton, and is principally attributable to The Discount Mill Village on Bradford Road. Whilst unit sizes here are not as comparable to retail warehousing, they are nevertheless significantly larger than most shop units in the traditional town centre, and are staffed at much lower densities.

Employee densities by retail sector

Retail Sector	Number of employees per '000 sq.m. ('000 sq.ft.) of retail floorspace.	
	1998	Aug 2003
Convenience	64.6 (6.0)	54.9 (5.1)
Comparison	38.7 (3.6)	34.0 (3.2)
Clothing/footwear	30.1 (2.8)	23.7 (2.2)
Furniture/carpets	23.7 (2.2)	31.2 (2.9)
Electrical goods	47.3 (4.4)	47.3 (4.4)
D.I.Y./Hardware	38.7 (3.6)	36.6 (3.4)
Mixed Goods	33.4 (3.1)	33.4 (3.1)
Other comparison	58.1 (5.4)	63.4 (5.9)
Personal services	120.5 (11.2)	117.3 (10.9)

Increases in employee densities are observed in the retail sub sectors of furniture/carpets and specialist/niche retailing. The only decrease of any significant scale is in clothing/footwear. Generally speaking, all other retail sub sectors recorded little change in employee densities over the last 5 years.

In all comparison retailing sub sectors, employee densities are higher in the traditional town centre than the wider town centre (which includes the Mill Discount Department Store). The differences are more pronounced in the sale of clothing/footwear and furniture/carpets (which includes household furnishings), where employee densities are 47.3 per '000 sq.m. and 50.5 per '000 sq.m, respectively.

Prior to Tesco's opening, 54.9 employees per '000 sq.m. of net retail floorspace worked in the convenience retail sector. However, since September 2003, this has increased to 57.1 per '000 sq.m. Compared to other town centres, Batley's convenience employee density is smaller than those recorded for either Dewsbury or Huddersfield town centres. The presence of Tesco, Netto and Aldi in Batley explain the comparatively low employment densities, with the 2 food discounters operating particularly low staffing levels.

Batley's turnover per employee figures have shown significant growth over the last 5 years in both the retail sectors of convenience and comparison goods trade (+29% and +17%, respectively). However, this growth can partly be explained by the 8% reduction in employee numbers the town experienced over the same period, prior to the opening of the new Tesco store.

The retail sub sector of clothing/footwear has shown a significant increase in its turnover per employee ratio since 1998 (+49%). However, this is partly explained by a corresponding decline in its employee to floorspace ratio that was recorded over the same period (-22%). Mixed goods and niche/specialist retailing have all shown a healthy growth in turnover per employee ratios, although furniture/carpets retailing has shown little change over the last 5 years. However, electrical goods in particular, and DIY/hardware to a lesser extent have both shown a decline in ratios.



The Mill Discount Department Store

The relatively low turnover per employee ratios recorded for the retail sub sectors of furniture/carpets, electrical goods and DIY/hardware largely relate to the absence of large unit accommodation, which typically has low employee numbers. Smaller shop units do not conveniently lend themselves to the display and storage of 'bulky goods', and therefore economies of scale cannot be secured. However, the majority of furniture, electrical goods and DIY/hardware retailers are trading from smaller shop units within the traditional town centre.