Town Centres Team, Planning Services

BATLEY TOWN CENTRE
ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS
MARCH 2006

INTRODUCTION

Since 1996, Kirklees MC Planning Services has undertaken a programme of research into the health and vitality of shopping centres in the District. The annual collection of key performance data enables the role of individual town centres to be assessed, identifying the scope for change, renewal and diversification.

The first full audit for Batley town centre was published in February 1999 and has since been updated by an audit in January 2004. Changes that have taken place since then have been examined in annual statements of key economic indicators. The indicators reported in this statement are:

- Shop unit and floorspace occupancy
- Vacancy rates
- Pedestrian footfall
- Retail development pipeline
- Retailer demand
- Prime retail rental levels

FLOORSPACE, SHOP UNITS AND VACANCY

Figure 1: Batley shop unit / floorspace statistics

	Nov 2004		Nov 2005	
	Sales fl'space sq.m	Shop units	Sales fl'space sq.m	Shop units
Convenience (food)	6,094 (25.4%)	18 (9.0%)	6,131 (25.0%)	18 (8.7%)
Comparison[1] (non-food)	16,123 (67.2%)	119 (59.5%)	16,646 (68.0%)	121 (58.7%)
Service	N/A	50 (25.0%)	N/A	49 (23.8%)
Vacant	1,790 (7.4%)	13 (6.5%)	1,725 (7.0%)	18 (8.7%)
TOTAL	**24,007 (100%)**	**200 (100%)**	**24,502 (100%)**	**206 (100%)**

A survey of shop unit occupancy undertaken during November 2005 reveals that Batley town centre provides a total of 24,502 sq.m. (263,642 sq.ft.) net retail floorspace, and 206 shop units. 68% of floorspace in Batley town centre is given over to comparison (non-food) retailing. Figure 1 illustrates the make up of the town in both 2004 and 2005.

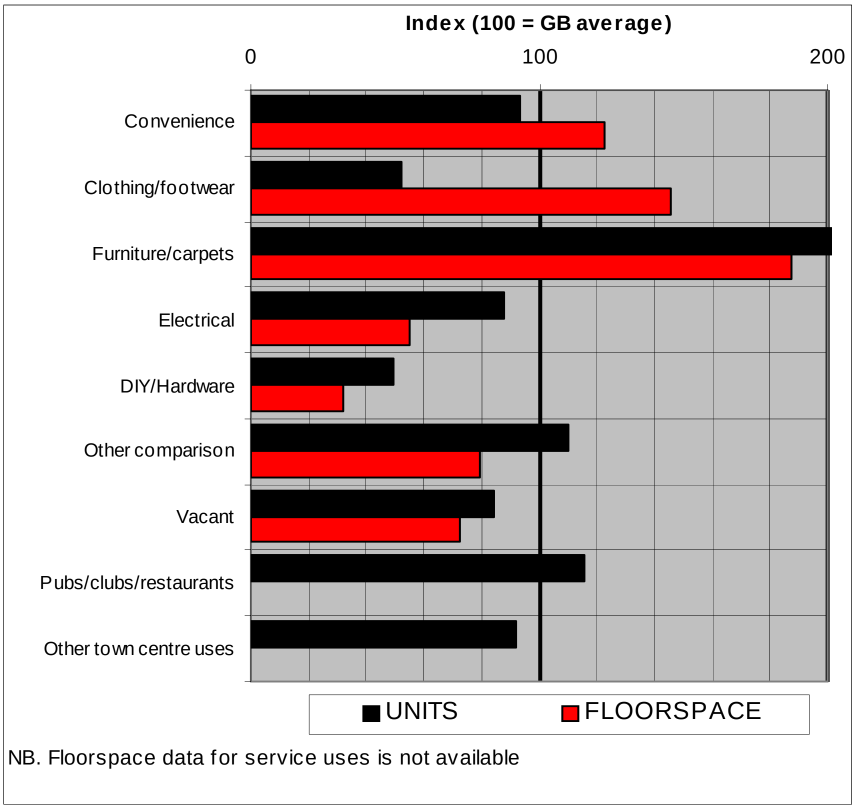
Batley remains the third largest town centre in the Kirklees District both in terms of number of shop units and amount of retail floorspace. The assessment of shop unit occupancy in the town registers only minor changes since 2004. The only noticeable difference relates to an increase in the number of vacant units (5 more than last year). These units are primarily situated in peripheral areas of the town, with the primary shopping area continuing to exhibit a healthy level of occupancy. Long term vacancy in Batley is a problem that is only evident within the Alfred's Way covered shopping mall which has never been fully let since its construction.

Figure 2: Percentage changes 2004-05

	Floorspace	Shop units
Convenience	+0.6	0
Comparison	+3.2	+1.7
Service	N/A	-2.0
Vacant	-3.6	+38.5
TOTAL	**+2.1**	**+3.0**

Figure 2 illustrates the percentage changes in occupancy during the last 12 months. Within this pattern of occupancy, the town centre has some 46 national multiple retailers – 16 of which are located on the primary shopping street. In addition to this, there are 2 national charity multiples present in the town. The total number of multiple retailers in Batley has increased by 12% over the last 2 years – primarily due to the success of the Mill Factory Outlet shopping complex.

Figure 3: Comparison with national averages[2]



When compared to the national averages for retail floorspace and shop units in UK towns, Batley records a shop unit vacancy rate and a floorspace vacancy rate that are both well below average. In addition, the town scores well above average in terms of representation of clothing/footwear retailers and furniture/carpet stores – both largely due to the contribution of the Mill. However, Batley exhibits a below average number of DIY/hardware and electrical goods retailers, which have been poorly represented in the town for some years. Convenience goods retailing, in terms of quantity of floorspace, is above UK averages due to the presence of Tesco Extra on Bradford Road. These trends are shown in Figure 3.

Figure 4 shows Batley's floorspace and vacant unit statistics in comparison to other towns in the Kirklees District. Batley has second lowest floorspace vacancy level in the District after Huddersfield (which records 5.5%). Batley's unit vacancy rate is well below that of Heckmondwike and Dewsbury and is second only to Cleckheaton.

Annual occupancy surveys will continue to be undertaken to monitor changes in the town's occupancy patterns and vacancy rates.

Figure 4: Floorspace (sq.m) & vacant unit comparisons[3]

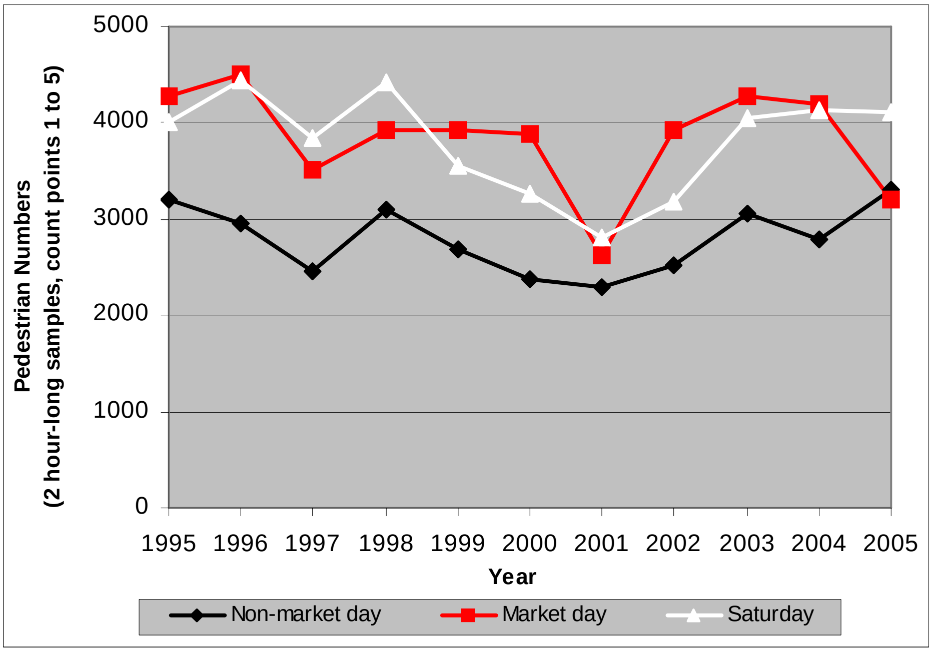
	Batley	Dewsbury	Heck'wike
Convenience	6,131 (25.0%)	8,336 (19.4%)	4,776 (42.0%)
Comparison$_1$	16,646 (68.0%)	31,281 (72.9%)	5,091 (44.8%)
Vacant	1,725 (7.0%)	3,287 (7.7%)	1,508 (13.2%)
Total retail Floorspace	**24,502 (100%)**	**42,905 (100%)**	**11,375 (100%)**
No. of vacant units	18 (8.7%)	58 (16.7%)	35 (21.8%)
Total no. of units	**206 (100%)**	**348 (100%)**	**160 (100%)**

PEDESTRIAN FOOTFALL

Since 1994, pedestrian footfall counts have been undertaken on a yearly basis in Batley to measure the volume and pattern of visitor/shopper movement. The exercise takes place on a non-market day, market day and Saturday during October/November. Counts are conducted for one hour in both the morning and afternoon (10.30am-11.30am and 2.30pm-3.30pm) with sample counts in between these. The map on Page 6 identifies the count locations.

In terms of the overall trend in pedestrian volumes visiting the town, Batley has recorded a drop in numbers on the market day. However, this is likely to have been affected by celebrations for the Muslim festival of Eid which may have reduced the number of people using the town on the survey day. The non-market day assessment, undertaken the previous day, shows an increase in pedestrian numbers of around 19%. This may also be due to increased trips into the town centre in preparation for the Eid celebrations. Saturday visitor numbers have remained relatively static compared to 2004. These trends are illustrated below in Figure 5.

Figure 5: Trends in morning and afternoon hour counts (1995-2005 – at 5 locations)



The highest levels of footfall are generated at the Tesco Extra entrance, the Mill Factory Outlet shopping complex, Commercial Street and the 2 principal entrances to the Bradford Road supermarket car parks. Upper Commercial Street and Branch Road are less busy on a non-market day than on days when the open market is operating. This indicates the popularity and attraction of the market as a destination in the town.

The bridge link connecting Commercial Street to the Tesco Extra store is a popular route with Alfred's Way (the alternative route connecting the car parks to the rest of the town) being less popular. The numbers of people exiting the Tesco store via the bridge link to town equates to around 25% of the number recorded going into the store at the main entrance. This illustrates the importance of this link. Figure 6 gives the street by street pedestrian footfall levels for 2005.

Figure 6: Morning and Afternoon Hour Samples 2005

Day/date		Non-Market Day Thurs 3/11/06		Market Day Fri 4/11/06		Saturday 5/11/06	
Weather		Overcast/ showers		Cold/wet		Overcast/ showers	
		a.m.	p.m.	a.m.	p.m.	a.m.	p.m.
1. Commercial Street		421	288	380	360	473	485
2. Cambridge Street		96	65	108	126	132	90
3. Upper Comm'l St / Branch Rd		196	121	356	307	492	238
4. Bradford Road		614	739	407	416	669	630
5. St James Street		401	366	342	410	490	414
TOTAL INTO TOWN		**1728**	**1579**	**1593**	**1619**	**2256**	**1857**
6. Alfred's Way:	a) Up	102	59	134	119	128	85
	b) Down	114	80	126	88	111	64
7. Tesco 'Extra':	a) In	599	583	613	641	1137	712
	b) Out	672	678	642	708	945	689
8. Bridge Link:	a) To Tesco	209	135	210	127	390	173
	b) From Tesco	142	159	145	137	292	232
9. The Mill:	a) In	326	245	400	279	535	663
	b) Out	190	392	142	370	283	690

All counts are flows into town unless otherwise stated. Counts at Bradford Rd, St James St and The Mill include both pedestrians and car occupants. The remaining counts relate to the movement of pedestrians around the town. Total into town includes count locations 1 to 5.

By comparing the 2004 survey results with the 2005 assessment, it can be seen that most locations (excluding the Mill and Tesco Extra) have recorded a decline in numbers on the market day (Figure

7). This may be a further reflection of the influence of both Eid celebrations and the poor weather on this survey day. The greatest increase in numbers was recorded at the main Bradford Road car park entrance where the number of people entering the town increased by 84%.

Figure 7: Street by street changes in pedestrian numbers (2004-2005)

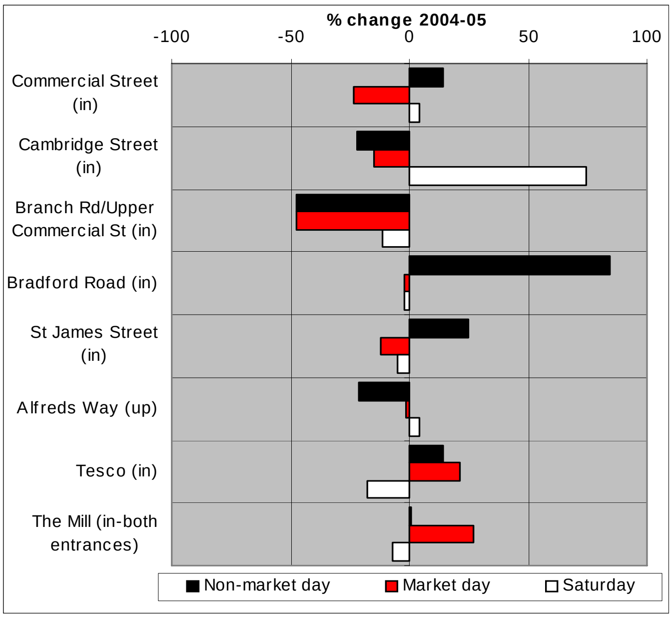


Figure 8: Daily profile of activity

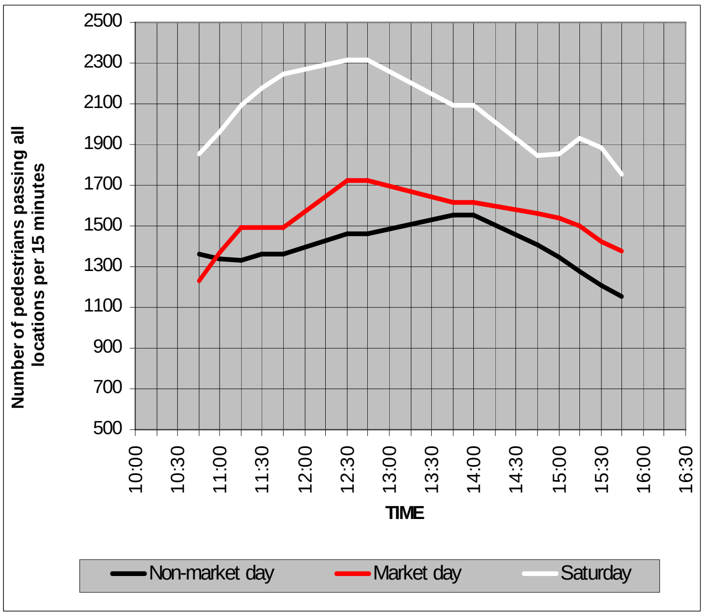


Figure 8 shows the changes in pedestrian volumes during the course of each survey day. It can be seen that Saturday continues to attract consistently higher numbers of people into the town, peaking at around 12.30 and slowly declining through the afternoon. In previous years the market day profile has registered at a much higher level than the non-market day profile. However, in this assessment the possible influence of Eid and poorer weather conditions are once again evident - bringing the level of visitors on the market day down towards the volumes recorded on the non-market day.

DEVELOPMENT PIPELINE

During the past 12 months, development to secure a new bus station comprising 6 bus bays, an indoor waiting area and retail unit, has been completed and is now in use. Other development in the town centre has largely been small scale refurbishment/conversion schemes including shop front improvements. A recent proposal has been put forward in relation to the development of Blakeridge Mills, just outside the town centre study boundary. This proposal includes more than a thousand new residential units – some of which would be apartments located in the existing mill premises. The exact details of this development are yet to be finalised and any decisions will be reported in future publications.

Batley has been targeted as part of the Local Public Service Agreement (Second Generation). This will see major public realm and private property improvements during the course of the next few years.

Above: The new Batley Bus Station concourse and retail unit

RETAILER DEMAND

A general assessment of demand for retail and leisure floorspace in Batley was undertaken during February 2006. Figure 9 shows the numbers of companies who have expressed interest in being represented in the town, and their maximum floorspace requirements. The number of registered requirements has decreased from 7 in 2004/5 to just 3. If accommodated, each of these would be new to the town bringing in a maximum floorspace of 1,812 sq.m. (19,500 sq.ft.). 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.

Figure 9: Retail / commercial requirements 2005/6

Category	Number of registered interests	Maximum floorspace requirement sq.m. (sq.ft)
Clothing/footwear	1	1,394 (15,000)
Cosmetics/toiletries	1	279 (3,000)
Bank/building society	1	139 (1,500)
TOTAL	**3**	**1,812 (19,500)**

Source: FOCUS Information Ltd and KMC

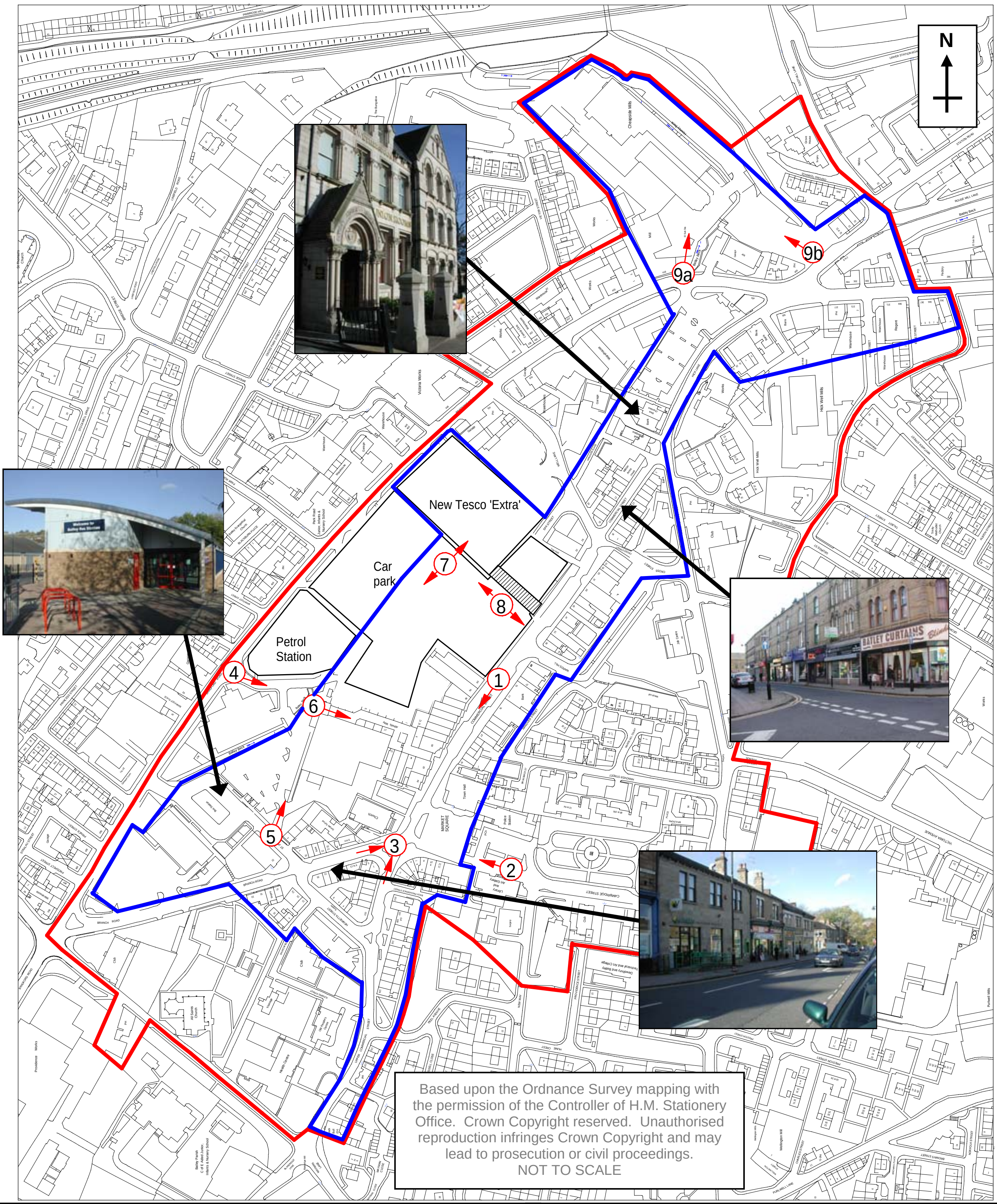
PRIME RETAIL RENTAL LEVELS

Batley's prime zone A retail rents reached £323 per sq.m. (£30 per sq.ft.) during 2004/05. This was a result of retailer movement in Commercial Street and the underlying positive economic effects of the new Tesco Extra on the town as a whole. Increased investor confidence in Batley has now filtered through and is demonstrated by this growth in rental levels. At the current time, prime retail rents remain at the £323 per sq.m. (£30 per sq.ft.) level but may see further consolidation in the near future with continued developer and retailer interest.

Above: Tesco Extra and the bridge link from the store to Commercial Street

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

BATLEY TOWN CENTRE PEDESTRIAN COUNT POINTS



Key to map

Position/direction of count
Main shopping area
Study boundary

1. **Commercial Street**
2. **Cambridge Street**
3. **Upper Commercial Street/Branch Road**
4. **Bradford Road**
5. **St James Street**
6. **Alfred's Way (from car park)**
7. **Tesco 'Extra' entrance (in/out)**
8. **Footbridge (to/from Tesco)**

9a/9b. The Mill (both entrances)

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