BATLEY TOWN CENTRE

ANNUAL STATEMENT OF KEY ECONOMIC INDICATORS
MARCH 2007

INTRODUCTION

The Kirklees Town Centre Audit programme monitors the health and vitality of shopping centres in the District and is undertaken by the Town Centres Team of Planning Services. The role of individual town centres is assessed and monitored through analysis of performance data which allows the scope for renewal, diversification and change to be identified.

Yearly statements on the health and vitality of Batley Town Centre have been produced along with two more extensive town centre audits in 1996 and 2004. This and other annual documents assess 6 key economic indicators which are:

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


Batley's main shopping street

This year, the document also includes data on car park usage in the town over the last 5 years.

FLOORSPACE, SHOP UNITS AND VACANCY

A survey of shop unit occupancy undertaken during November 2006 reveals that Batley Town Centre provides a total of almost 29,000 sq.m. (312,000 sq.ft.) net retail floorspace. 209 shop units were surveyed within the study area, 18 of which were given over to convenience (food) goods retailing and 122 to comparison (non-food) goods. 68.8% of sales floorspace in the town is trading in non-food goods. Figure 1 illustrates the make up of the town in both 2005 and 2006.

Figure 1: Batley shop unit / floorspace statistics

	Nov 2005		Nov 2006	
	Sales fl'space sq.m	Shop units	Sales fl'space sq.m	Shop units
Convenience (food)	6,131 (25.0%)	18 (8.7%)	7,420 (25.9%)	18 (8.6%)
Comparison[1] (non-food)	16,646 (68.0%)	121 (58.7%)	19,692 (68.8%)	122 (58.4%)
Service	N/A	49 (23.8%)	N/A	48 (23.0%)
Vacant	1,725 (7.0%)	18 (8.7%)	1,441 (5.0%)	20 (9.6%)
Under refurbishment	N/A	N/A	76 (0.3%)	1 (0.5%)
TOTAL	**24,502 (100%)**	**206 (100%)**	**28,629 (100%)**	**209 (100%)**

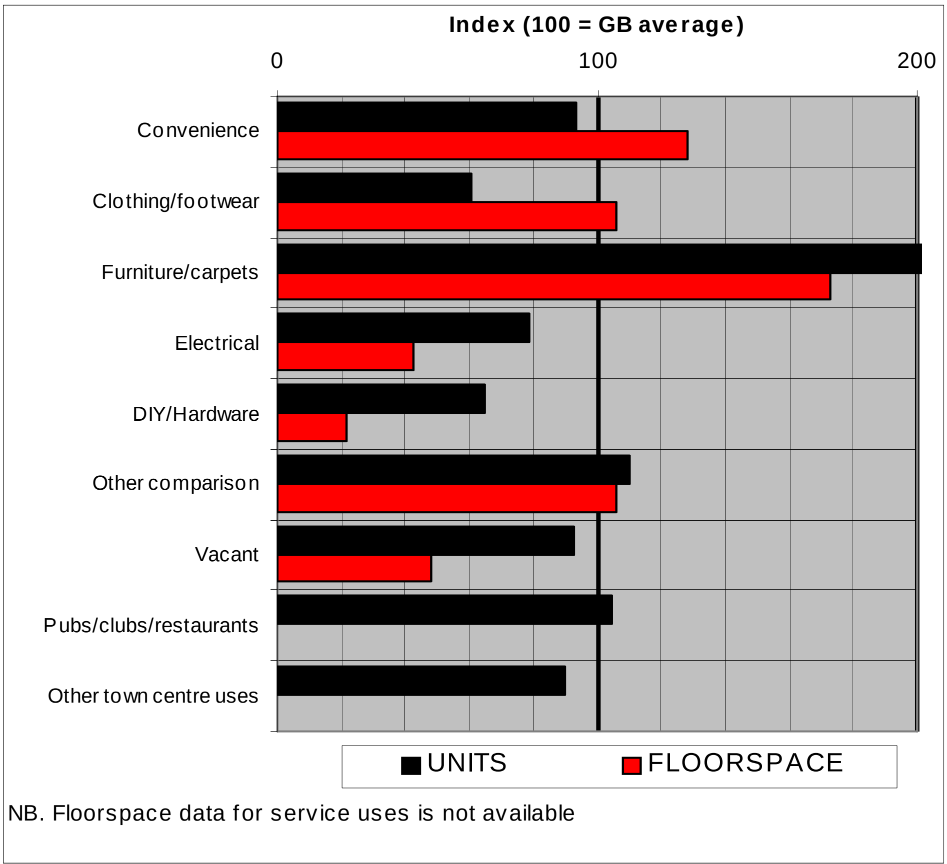
The vacancy rate in the town currently stands at 5.0% of floorspace (9.6% of shop units) which is well under the national average and is 16.5% lower than in last year's assessment. This has been influenced by the take-up of large sized vacant units such as that on the corner of Soothill lane and Station Road which is now under refurbishment for residential use. Conversely, the number of vacant units in the town has increased slightly since the 2005 assessment. New vacancy in the town includes the former HSBC bank on Hick Lane and 3 units on the main shopping street (Commercial Street). Vacancy in the town is still very low in comparison to the high levels reached in 2002 when 12.6% of floorspace and 14.0% of units were recorded as vacant. Vacancy within the prime pitch continues to be very low.

Figure 2: Percentage changes 2005-06

	Floorspace	Shop units
Convenience	+21.0	0
Comparison	+18.3	+0.8
Service	N/A	-2.0
Vacant	-16.5	+11.1
TOTAL	**+16.8**	**+1.5**

Overall, there has been little change in the number of shop units in the town. However, the level of retail floorspace registered within the study area has risen by 16.8%. This is largely due to the opening of a mezzanine floor within the Tesco extra store on Bradford Road in summer 2006 which has contributed a significant amount of comparison goods floorspace to the town's offer. Figure 2 shows the percentage changes in the make up of the town's retail floorspace and shop units during the last 12 months.

Figure 3: Comparison with national averages[2]



In comparing the pattern of floorspace and shop unit occupancy to the national averages for a typical UK town (Figure 3), Batley continues to have a much higher than average representation of furniture/carpet retailers in terms of both number of units and amount of floorspace. This is primarily due to the contribution of The Mill on Bradford Road but also reflects the number of independent carpet, curtain and furniture retailers in the town centre. The lowest comparable representations are within the categories of electrical goods and DIY/hardware goods which have been under-represented in the town for many years. However, vacancy levels shown in Figure 3 indicate a good level of economic health in the town particularly given the low prime pitch vacancy and the low level of long term vacancy.

Figure 4 shows Batley's floorspace and vacant unit statistics in comparison to other towns in the Kirklees District. Batley currently has the lowest floorspace vacancy rate in the District at only 5.0%. The town continues to be second only to Holmfirth in terms of the percentage of occupied shop units. Batley's unit vacancy rate has been significantly lower than Dewsbury and Heckmondwike for a number of years. It is worth noting that 35% of the vacant units in Batley are within the Alfred's Way shopping centre which has never been fully let since it was built in the 1980's.


The Mill, Bradford Road

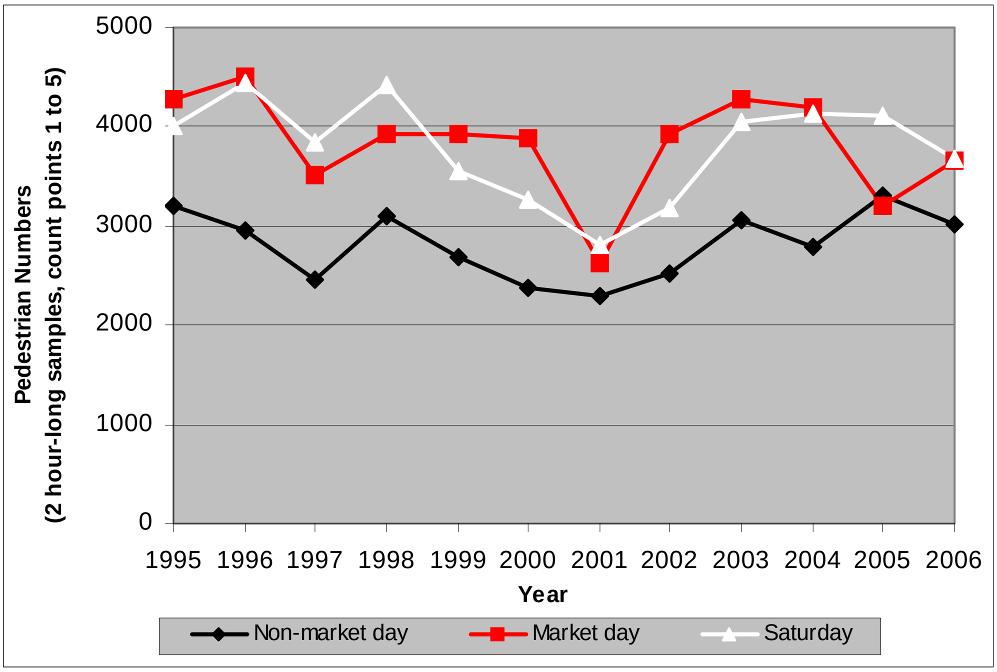
Figure 4: Floorspace & vacant unit comparisons[3]

	Batley	Dewsbury	Heck'wike
Convenience sq.m.	7,420 (25.9%)	8,336 (19.4%)	4,914 (45.2%)
Comparison[1] sq.m.	19,692 (68.8%)	31,281 (72.9%)	4,636 (42.6%)
Vacant sq.m.	1,441 (5.0%)	3,287 (7.7%)	1,333 (12.2%)
Under refurbishment sq.m.	76 (0.3%)	n/a	0 (0%)
Total retail floorspace sq.m.	**28,629 (100%)**	**42,905 (100%)**	**10,883 (100%)**
No. of vacant units	20 (9.6%)	58 (16.7%)	33 (22.0%)
No. units under refurbishment	1 (0.5%)	n/a	0 (0%)
Total no. of units	**209 (100%)**	**348 (100%)**	**150 (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 November to provide a 'snapshot' picture at the same time each year. Counts are conducted for one hour in both the morning and afternoon (10.30am-11.30am and 2.30pm-3.30pm) with a series of sample counts in between these. The count locations cover main access points into the town centre and primary circulation routes including the bridge access to the town's main shopping street from the Tesco Extra store on Bradford Road. The distribution of count locations is shown on the map on page 8.

Figure 5: Trends in morning and afternoon hour counts (1995-2006 – at 5 locations)



The trend in overall visitors to the town shows a slight downturn of 2.7% this year. There was a drop in numbers registered on the market day assessment last year which was attributed to the celebrations for the Muslim festival of Eid – the number of visitors on market day this year has recovered to normal levels. However, decline in visitor numbers has been recorded on both non-market day and Saturday. These trends are illustrated in Figure 5.

On a street by street basis, the largest numbers of people are recorded along Commercial Street, and at the access points to the Tesco car park off Bradford Road and St James Street, the entrance to Tesco itself and the entrances to The Mill (see Figure 6). In comparison, poor levels of pedestrian usage are recorded along the Alfred's Way shopping centre. However, this route remains important in terms of connectivity between the different land levels of Bradford Road and Commercial Street, and if the centre operated more successfully in its retail role it would no doubt attract a better flow of people. If the centre continues to exhibit a very high level of vacancy, its attractiveness and role will be limited.

Since the 2005 assessment, both Cambridge Street and the Branch Road/Upper Commercial Street junction have seen increases in weekday numbers. However, this is not apparent on the Saturday counts. The newly refurbished and extended health centre on the edge of the study boundary to the south may be contributing to this increase given that Upper Commercial Street links the Health Centre to the main shopping area. Street by street changes in pedestrian numbers are given in Figure 7.

Figure 6: Morning and Afternoon Hour Samples 2006

Day/date		Non-Market Day Thu 9th Nov		Market Day Fri 10th Nov		Saturday 11th Nov	
Weather		Dry, sunny, cold		Cold, overcast, showers pm		Windy, cold, rain pm	
		a.m.	p.m.	a.m.	p.m.	a.m.	p.m.
1. Commercial Street		325	260	429	330	329	223
2. Cambridge Street		120	84	154	135	126	61
3. Upper Comm'l St / Branch Rd		312	226	542	292	302	141
4. Bradford Road		469	431	539	437	748	766
5. St James Street		480	305	408	382	456	535
TOTAL INTO TOWN		**1706**	**1306**	**2072**	**1576**	**1961**	**1726**
6. Alfred's Way:	a) Up	71	82	110	81	118	91
	b) Down	110	79	106	88	110	100
7. Tesco 'Extra':	a) In	659	510	807	759	836	965
	b) Out	707	683	834	965	876	1011
8. Bridge Link:	a) To Tesco	259	161	277	271	185	256
	b) From Tesco	178	131	223	183	160	160
9. The Mill:	a) In	226	213	418	263	471	623
	b) Out	123	191	196	397	285	509

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.

Figure 7: Street by street changes in pedestrian numbers (2005-2006)

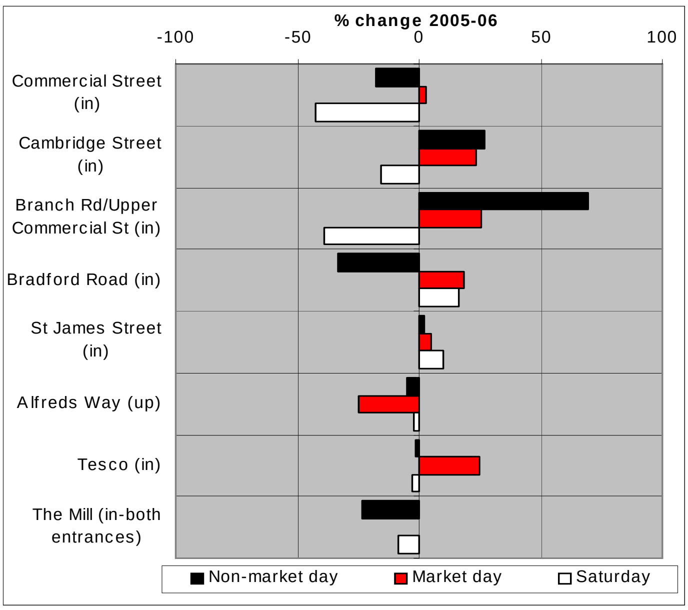
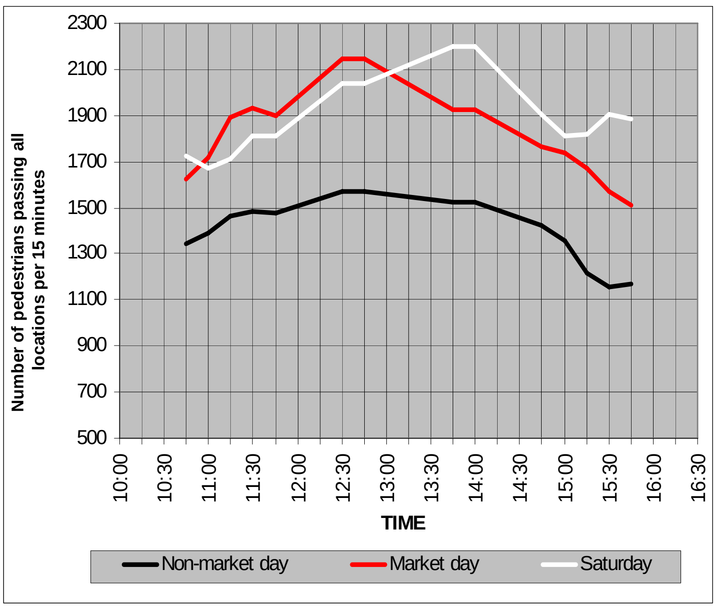


Figure 8: Daily profile of activity



In terms of the pattern of activity throughout the trading day, Figure 8 illustrates the 2006 trends. In comparison to last year, the market day pattern is at a much higher level and has achieved a similar magnitude to the Saturday counts. The Saturday counts show a peak in numbers around the early afternoon whilst non-market day shows a pattern of fairly constant activity throughout the day, albeit at a lower level. The market day counts reflect the continued influence of the outdoor market in attracting visitors to the town centre.

CAR PARK OCCUPANCY LEVELS

Since 2001, occupancy levels within Batley town centre car parks have been measured using 'spot' checks on the same days as the pedestrian footfall assessments. At four separate points through each day, the number of vehicles occupying parking spaces within the each of 15 car parks is recorded. The average daily occupancy rate can then be calculated. General trends in occupancy for the town as a whole are illustrated in Figure 9 – this also shows changes in car park occupancy since 2001. From this, it is clearly evident that car parks in Batley are under-utilised, on average achieving only around 50% occupancy overall. However, there is a trend of increasing use on market days since 2003 with both Saturdays and non-market weekdays also achieving higher occupancy levels in 2006 than in 2003. Saturday car park usage appears to have peaked in 2005 and has dropped below the levels achieved on market day in the 2006 assessment.

Figure 9: Average occupancy levels across all car parks

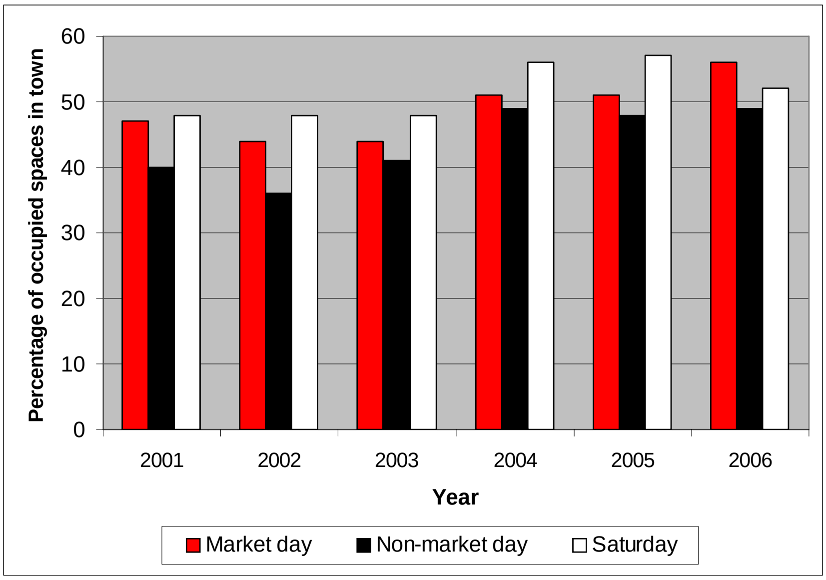
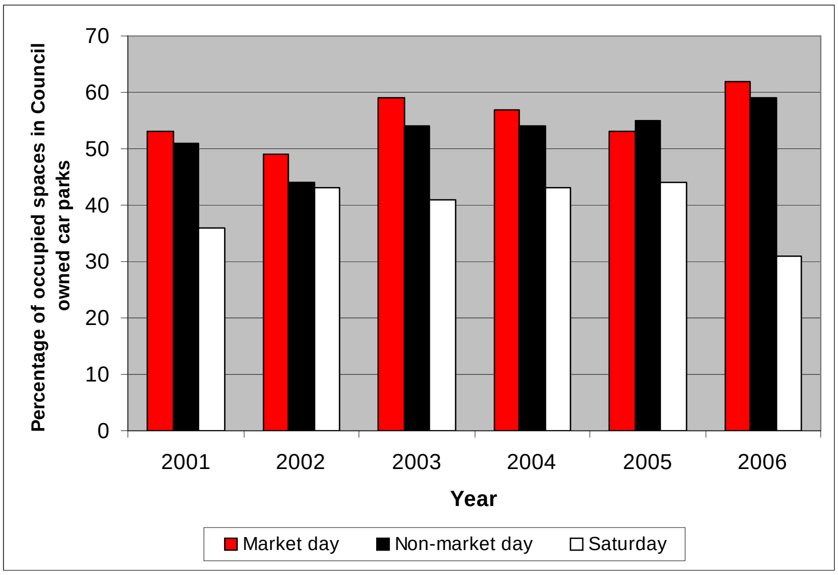


Figure 10 shows the usage levels of all Council owned car parks only – these are all free of charge and the majority are located close to the traditional shopping core of the town. Importantly, this shows a significant trend of low Council owned car park usage on Saturdays – a pattern which is particularly evident in the 2006 surveys.

At a more detailed level, the most under-used car parks on weekdays in the town (less than 30% occupied) include the Conservative Club on Branch Road, The Mill, Field Lane and Aldi – all of which are located on the periphery of the town centre. On a Saturday, the car parks used least are Hick Lane, Field Lane, Iceland, Aldi and New Way (which is located up steps from Cambridge Street near the Library).

Figure 10: Average occupancy levels in Council owned car parks only



Car parks which are consistently achieving around 75% occupancy or more on all survey days are Cross Street (directly behind the shops at the northern end of Commercial Street), Henrietta Street (close to the Health Centre), and Well Lane (a small car park just off Commercial Street). Furthermore, on weekdays, the Wellington Street car park is well used, as are both the Market Place and Netto car parks on a market day. The car park at The Mill is much better used on a Saturday afternoon than at any other time.

When the car park occupancy results are compared to the pedestrian footfall assessment, it is clear that, in overall terms, market day and Saturday attract the highest numbers of people and the greatest car park occupancy with non-market days consistently falling behind. The drop in usage of Council owned car parks on Saturdays coincides with an increased use of The Mill and Tesco car parks in particular. This is also matched with high levels of pedestrian footfall at these retail destinations and at the access points to their car parks. However, the link routes between these popular retail locations into the rest of the town centre are relatively poorly used.


Tesco car park

Combined with the low car park usage around the upper area of the town centre, it is evident that the town is struggling to attract people away from the anchor stores and into the traditional shopping area. However, the influence of public transport on the circulation of people around the town should not be underestimated. Numbers of people walking up Branch Road into the town from the bus station have increased since last year's assessment and perhaps illustrate the success of the new bus station as a drop-off point in the town. Bus stops located along Commercial Street are still proving popular and help to maintain a good flow of people along this primary route.

DEVELOPMENT ACTIVITY

There has been some notable development activity within Batley Town Centre during the last 12 months. This includes the construction of a large mezzanine floor within the Tesco Extra store on Bradford Road and the continued work on the building at the bottom of Soothill Lane which is to become 24 flats with a retail unit and a restaurant.

Redevelopment on Soothill Lane

There is further significant development activity in the pipeline with a number of planning permissions having been granted in the last 12 months. In retail terms, this includes permission for alterations and an extension to the Alfred's Way shopping centre which was granted in July 2006. This work will increase the centre's retail sales area by 200sq.m. and will create a large single store at the Commercial Street end. In addition, permission was granted in January 2007 for the conversion and extension of a public house on Station Road into a restaurant and bar with a first floor residential unit.

The potential change of use and conversion of Blakeridge Mills on Mayman Lane to 332 apartments, 20 town houses and a B1 office use along with the construction of 148 dwellings and associated parking is currently awaiting a decision by Committee. Other non-retail development potential in the town includes the conversion of the former Jessops Wine Bar on Station Road to 14 apartments which was granted permission in October 2006; the conversion of an existing mill on Bar Street to 12 flats which was approved in August 2006; and various small scale refurbishments, alterations and changes of use across the town. One other significant outstanding planning permission relates to extension of retail premises at The Mill on Bradford Road to provide an additional 15,000sq.ft. of sales floorspace. This was granted in 2004 and has yet to be implemented.

In addition to these developments, Batley is currently subject to a variety of public realm investment projects as part of the Council's Local Public Service Agreement with the Government. These will include shop front improvements, new planting and landscaping, improvements to signage and map boards, and street banners advertising events and attractions to promote the town. Many of these projects will be implemented before the autumn of this year.


Blakeridge Mills, Mayman Lane

All of this development activity is helping to generate interest and confidence in the town and is in turn acting as a catalyst for further investment. Developer interest in various buildings within the town is becoming apparent and opportunities for re-using redundant buildings may well be taken up in the short term future.

DEMAND FOR REPRESENTATION

A general assessment of demand for representation in Batley town centre was undertaken in February 2007. This revealed that there are currently 5 recorded expressions of interest in the town, which is 2 more than last year. Figure 11 shows the requirements by category of use and size.

Figure 11: Retail/commercial requirements 2007

Category of use	Number of requirements	Total sales floorspace sq.m. (sq.ft.)
Convenience (food)	1	55 (600)
Clothing/footwear	1	1,400 (15,000)
Kitchen/bathroom/DIY	1	465 (5,000)
Takeaway/café	1	325 (3,500)
Financial	1	140 (1,500)
TOTAL	**5**	**2,385 (25,600)**

Source: FOCUS Information Ltd and KMC

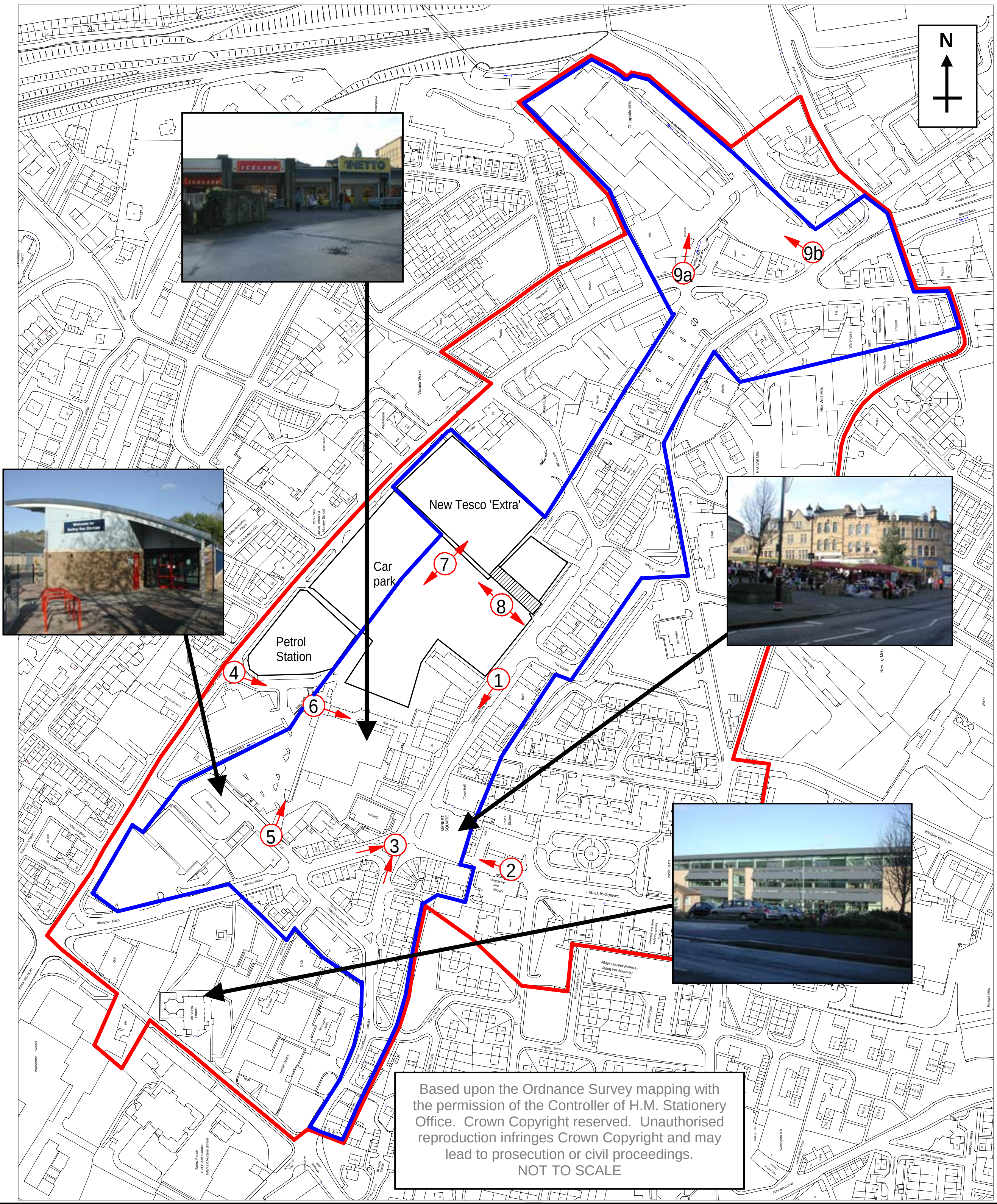
All of these interested businesses would be new to the town and over half of the required floorspace would be sought in prime pitch/high street locations. If these were all to be accommodated, Batley would see 25,600sq.ft of floorspace brought back into use. This assessment, however, does not account for businesses currently represented in the town who wish to relocate to larger or better premises within Batley, nor does it include interest for office accommodation or professional/commercial uses.

PRIME RETAIL RENTAL LEVELS

Prime retail rents across the Yorkshire and Humberside region rose by 4.0% in the 12 months to May 2006. At the local level, the prime retail pitch in Batley town centre is located on Commercial Street, stretching from the Alfred's Way shopping centre down to the last shop unit before the bridge link to Tesco Extra. Independent evidence provided by Colliers CRE on behalf of the Council reveals that Zone A rental levels in Batley's prime pitch remain at £323 per sq.m. despite the regional growth that has been experienced.

Notes:
[1] Comparison goods figures include A1 uses such as opticians and travel agents etc.
[2]Based on the current 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 (red arrow)
- Main shopping area (blue line)
- Study boundary (red line)

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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