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DEWSBURY TOWN CENTRE AUDIT 2001
FACT SHEET 2: CATCHMENT AREA AND TURNOVER

Introduction

This document, produced by Kirklees MC's Planning Service, is designed to provide supplementary information on catchment area and turnover to accompany the 2001 Town Centre Audit for Dewsbury (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.

The extent of Dewsbury's trade area[1]

The extent of Dewsbury's catchment for both convenience and comparison goods shopping is shown in the 2001 Town Centre Audit. The trade areas defined are based on data obtained through (i) an extensive householder survey undertaken in May 2001, and (ii) a shoppers questionnaire survey undertaken in Dewsbury town centre during May and June 2001.

There have been a number of changes to Dewsbury's convenience catchment area since 1999. Whilst it has expanded in the north to encompass Birstall, it has nevertheless contracted in the north-west to exclude Gomersal, Birkenshaw and Liversedge. These changes mean that Dewsbury's catchment population has declined by 10% over the last 2 years.

Over the same period, Dewsbury's comparison catchment area has declined by 17%. Minor expansion in the north-east (Upper Green near Tingley) and in the south-west (Upper Hopton) has been cancelled out by a contraction of the town's trade area to exclude Scholes, Cleckheaton, Gomersal and Birkenshaw.

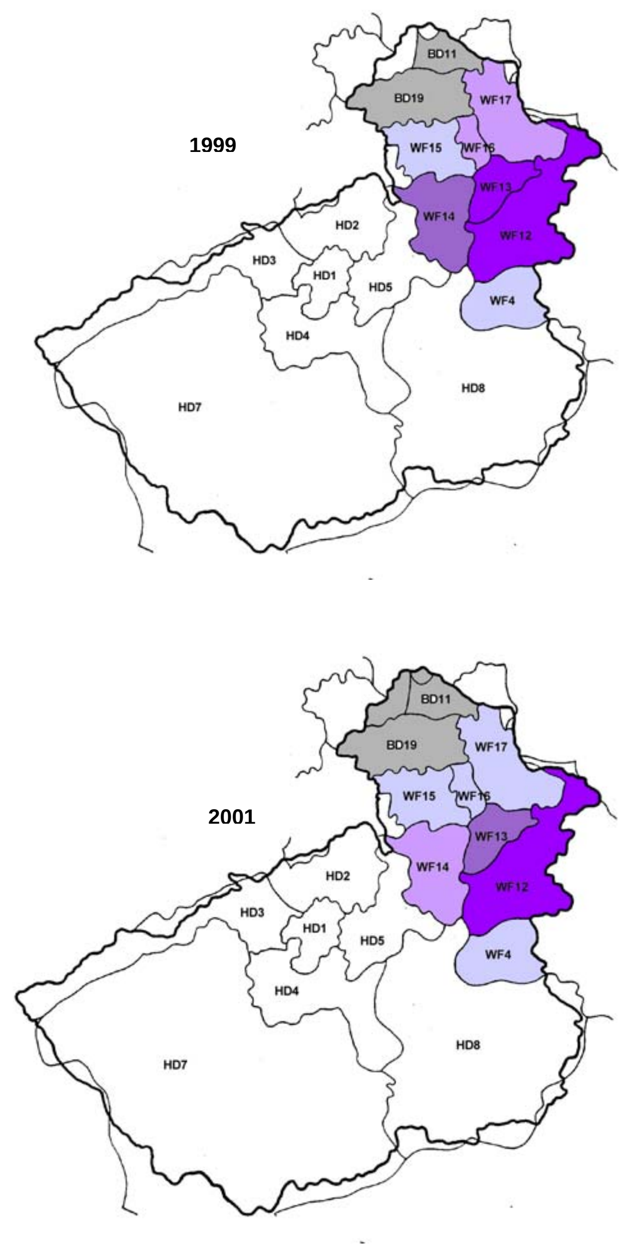
Dewsbury does not have a uniform influence over its trade area, and this is clearly illustrated in Figures 1 and 2. These show the relative strength of the town in terms of percentage draw from individual postcode districts in Kirklees, for both convenience and comparison goods expenditure.

The convenience draw map shows that Dewsbury achieves the highest level of market penetration in Thornhill, Savile Town, Ravensthorpe, Chickenley, Earlsheaton, Dewsbury Moor and Hanging Heaton. These areas, which represent the town's 'core' catchment, see between 54% and 57% of convenience goods expenditure captured by Dewsbury. The draw weakens to the north and west, due to the influence of the foodstore anchors in Batley (Tesco, Aldi and Netto), and Heckmondwike (Morrisons). Nevertheless, Dewsbury still manages to capture some 20% of convenience expenditure generated within the Mirfield and Batley areas.

Dewsbury has an extensive catchment area and captures a significant share of the convenience expenditure generated within its 'core'. However, the strength of the town's convenience draw has weakened over the last 2 years - a reflection of the growing competitiveness of nearby facilities.

[1] It is important to note that the catchment areas defined for both convenience and comparison goods trade extend beyond the Kirklees district into Wakefield and Leeds. Figures 1 and 2 are confined to illustrating the percentage draw of Kirklees residents only

Figure 1: Comparison goods trade draw by postcode district 1999 and 2001



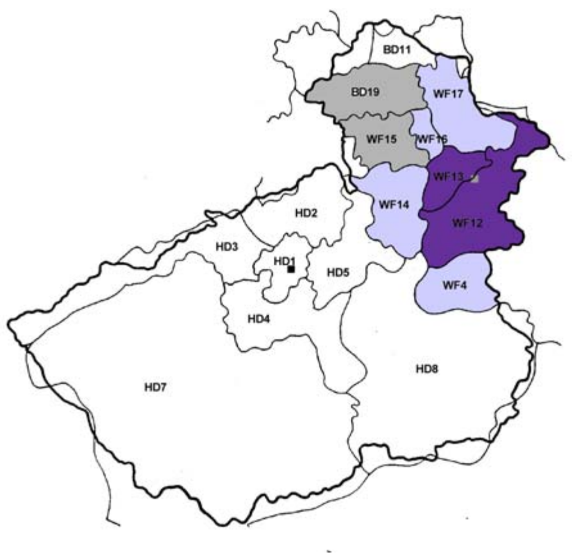
Key to percentage draw maps:

	61 +
	51 - 60
	41 - 50
	31 - 40
	21 - 30
	11 - 20
	6 - 10
	0 - 5

In terms of comparison goods trade, Dewsbury's draw is strong within the town's immediate urban area, where it achieves market penetration of around 40% in postcode districts WF12 and WF13 (Ravensthorpe, Dewsbury Moor, Crackenedge, Savile Town, Thornhill, Earlsheaton and Chickenley). Trade draw weakens to the north and west, although Dewsbury still captures 28% from the Mirfield area and around 18% from the Batley, Birstall and Heckmondwike areas. However, market penetration in the south Kirklees area is very weak, achieving between 0% and 4% from the Huddersfield postcodes.

The town has a significant influence on shopping patterns within north Kirklees. This is largely due to the presence of the open market and the Railway Street retail warehouse park. Nevertheless, it can be seen that Dewsbury's trade draw has weakened over the last 2 years as a result of competition. The postcode districts of WF13, WF14, WF16 and WF17 have all experienced a decline in the proportion of expenditure captured by Dewsbury town centre.

Figure 2: Convenience goods trade draw by postcode district 2001



The nature of competition

Since 1999, 28,000 sq.m. (302,000 sq.ft.) of new retail floorspace has been built within just 20 minutes drive time of Dewsbury town centre. Of this, 87% is either in edge of centre of free-standing locations. A further 26,950 sq.m. (290,000 sq.ft.) of retail floorspace exists in the form of unimplemented or current planning applications.

The White Rose Centre in Morley presents a particular threat to Dewsbury. The Centre has 60,386 sq.m. (650,000 sq.ft.) of floorspace with over 100 retail outlets, anchored by Sainsbury's Savacentre and Debenhams department store. The 1997 Audit revealed that during the first few months of trading, it only had a marginal impact on Dewsbury's trade area. However, by 1999, this had become more substantial. 2 years on (2001), the level of impact has grown to the extent that between 11% and 16% of comparison goods expenditure generated by residents of the Earlsheaton, Hanging Heaton, Batley Carr, Mount Pleasant and Soothill areas is being captured by the White Rose Centre.

Leeds has comparison goods trade draw that affects **all** of the Kirklees area, although its greatest impact is on the Heavy Woollen District. Liversedge, Birkenshaw, Batley and Birstall are all losing between 10% and 13% of their comparison goods expenditure to Leeds.

The Birstall Retail Warehouse Park (Junction 27 of the M62) also has an effect on comparison goods shopping patterns, although the degree of impact is partly constrained by the nature of unit occupancy on the park. Nevertheless, it is able to capture between 9% and 10% of comparison goods expenditure from those postcodes within Dewsbury's secondary catchment, although trade draw from its 'core' catchment is limited to between 5% and 6%. However, the attraction of this retail warehouse park is likely to strengthen as a result of the gradual introduction of a wider range of products for sale. This has occurred due to historically lapse planning controls. Planning conditions, which normally limit the nature of occupancy, were not attached when the first phase of this retail warehouse park was constructed in the early 1990's.

The growing threat of out of town retail facilities is of great concern amongst businesses in Dewsbury town centre and, indeed, traders throughout the Kirklees District. This is highlighted in the results of the business questionnaire survey where 66% of respondents identified out of town competition as a serious problem affecting not only their trading performance, but the health and vitality of the town centre as a whole.

Turnover and expenditure retention

Expenditure retention (or market penetration) is the volume of turnover that is drawn into a centre from its trade area, expressed as a percentage of the total expenditure that can be generated by its resident population.

Figure 3: Turnover, trade area and retention level

Turnover		
	Convenience goods	**Comparison goods**
Retail floorspace (net sq.ft.)	79,086	300,634
Turnover of town centre [2]	£57,983,400	£78,240,557
Proportion of town centre turnover generated from within the catchment area [3]	£53,344,728	£66,740,000
Retention level		
Population within the trade area	119,340	145,500
Expenditure growth Per annum [4]	0.1%	3.6%
Consumer expenditure estimates (per capita) [5]	£1,259	£1,861
Potential expenditure within the trade area	£150,249,000	£271,000,000
Retention level [6]	35.5%	24.6%

[2] Based on business questionnaire survey 2001, CIG Retail Rankings, Co-op Retail Review
[3] Based on 2001 Kirklees householder survey and on shoppers questionnaire survey 2001. The town centre attracts 8% of its convenience goods turnover and 15% of its comparison goods turnover from outside the defined catchment area.
[4] Taken from URPI Brief 99/2 using long term growth trends.
[5] Taken from URPI Brief 99/2 and adjusted to take account of local variations in expenditure. The adjustment is based on an assessment of household income derived from CACI data sources.
[6] The volume of turnover that is drawn into Dewsbury town centre from its trade area, expressed as a percentage of the maximum potential consumer expenditure that can be generated by its resident catchment population.

Some 8% of the turnover on convenience trade and 15% of the turnover on comparison trade is derived from those shopping in Dewsbury town centre from outside the defined catchment areas.

In terms of trade retention, the town achieves an overall penetration rate of 35.5% for convenience turnover and 24.6% for comparison turnover. To put it another way, in respect of all the shoppers living within the Dewsbury trade area, only 24.6% of their spending on comparison goods actually goes to Dewsbury town centre.

Dewsbury had a convenience goods retention level of 43.1% in 1996, but by 2001 this had fallen to 35.5%, along with a contraction of its catchment area by 10%. The loss of the Pioneer foodstore from the town in 1998, coupled with the growing competitiveness of nearby centres explains the scale of decline recorded. Morrisons in Heckmondwike, Asda and Morrisons in Morley, Morrisons in Wakefield and Sainsburys at the White Rose Centre, have all impacted upon Dewsbury's convenience trade draw. Furthermore, a new purpose built Tesco foodstore of 8,364 sq.m. (90,000 sq.ft.) is to be constructed in Batley town centre. Work starts in June 2002.

It is important that Dewsbury is able to 'claw back' at least some of the convenience trade that is being captured by these facilities. However, to improve its retention level to a position that reflects its 1996 status would require both qualitative **and** quantitative improvements to Dewsbury's convenience goods offer. The construction of the new Asda foodstore (completion date of May 2002) will go some way towards achieving this. Whilst there will be an impact on the pattern of food shopping currently undertaken in the centre, Dewsbury's retention level will nevertheless increase to 45.2%.

In terms of comparison goods trade, Dewsbury's retention level has fallen from 28.7% in 1996 to 24.6% in 2001, along with a contraction of its catchment area by 17%. However, recent occupancy changes on the retail warehouse park (for example the opening of Matalan), the construction of a new Wilkinsons store in the town centre, and the non-food range of goods that will be available in the new Asda store, are all likely to strengthen the town's trade draw.

Construction of the new Wilkinsons store

Dewsbury has 2 strong retail 'attractions' in the open market and the retail warehouse park. These draw in people from a wide area. The strength of the market in particular, is reflected in the pattern of footfall recorded in the town (see Fact Sheet 1).

The town's shopping core continues to exhibit a good range and quality of shops, high levels of pedestrian footfall, low vacancy rates and healthy rents – all within an environment of high townscape quality. In contrast, secondary and peripheral shopping frontages continue to exhibit a weak retail offer.

Nevertheless, they are beginning to find favour with a number of leisure and service uses, including residential. Daisy Hill and Northgate both provide good examples of how non-retail uses can be successfully introduced into the town without adversely affecting the centre's shopping function.

The busy open market

Reflecting the findings of the 1999 Audit, Dewsbury has many secondary shopping frontages with high levels of vacancy. It would be of considerable benefit to the form and function of the town centre if a move out of retailing was encouraged for a number of secondary frontages. This would assist in the process of consolidation, at the same time as creating a greater diversity of activity.

Secondary frontage – top of Daisy Hill