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Planning. Design. Economics.

SETTLE TOWN CENTRE HEALTH CHECK

FEBRUARY 2016



Settle Town Centre Healthcheck

This town centre health check provides a snapshot of the current health of Settle town centre. The assessment of town centre health is based on the indicators set out in National Planning Policy Guidance (NPPG) (Paragraph: 005 Reference ID: 2b-005-20140306) and the National Planning Policy Framework (NPPF) requirement for local planning authorities to assess and plan to meet the needs of main town centre uses in full. It is supported by primary research comprising:

- Site visit to the retail centre;
- Business owner surveys;
- In-street customer surveys; and
- Pedestrian counts.

The primary information collected is summarised in this document and full raw data sets are included as technical appendices to the associated 2015 Retail and Leisure Study (the 2015 Study). The findings are presented in an Infographic, with further analysis, commentary, photographs and an updated land use plan given in the pages that follow.

The purpose of the health check is to form part of a robust retail evidence base to aid Local Plan preparation.

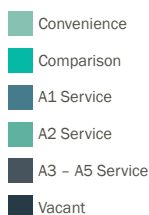
The Settle Town Centre Health Check is undertaken having regard to the extent of the Town Centre as defined by Experian GOAD. The GOAD Town Centre area extends further north along Church Street and south along Duke Street and Station Road than the Core Retail Area as defined in the Craven Local Plan (1999). NLP completed its health check site visit on Friday 29 May 2015 between 10:00am and 12:00pm.



Settle Town Centre Health Check

Key Indicators

01 DIVERSITY OF USES



- Diversity of uses closely matches the national average in most use classes with the exception of A3 - A5 services (5% below the national average), and comparison goods stores (4% over the national average)
- Relative lack of A3 - A5 is surprising given the towns' role as a tourist destination

A1: Shops - A2: Financial & Professional Services - A3: Food & Drink - A4: Drinking Establishments - A5: Hot Food Takeaway

02 PROPORTION OF VACANT STREET LEVEL PROPERTY



15.24% Settle

11.84% National Average

03 CUSTOMERS' VIEWS AND BEHAVIOUR



- Tourists account for a high proportion of customers
- 67% of visitors intended to visit leisure facilities whilst they were in the town centre
- 73% did not ever visit Settle town centre in the evenings

04 RETAILER REPRESENTATION AND INTENTIONS TO CHANGE REPRESENTATION



- High turnover of businesses
- 7% of respondents to the Business Survey indicated that they intend to close or relocate to new premises outside the local area

05 COMMERCIAL RENTS



- Demand for units is seasonally dependent
- Average rental rents between £15-25 per sq.ft

06 PEDESTRIAN FLOWS



- Highest footfall at junction of Cheapside/Duke Street
- Outside of the Old Post Office on Duke Street was one of the quietest areas surveyed, but this area also saw the biggest change on Market Day (81% increase)

07 ACCESSIBILITY



- Parking charges are enforced at all three main car parks between 9am and 6pm, 7 days per week, although some free on-street parking is available
- Many people walk into the town centre from the surrounding areas (21%)
- Majority of respondents stated that they felt the accessibility of Skipton by car, the availability of parking and the parking charges were good

08 PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME



- No signs of graffiti, vandalism or antisocial behaviour observed
- Almost all of those surveyed (98%) said that they felt safe walking around the town centre during the day
- Over 80% of people said that increased police presence or CCTV use would not make them feel any safer

09 STATE OF TOWN CENTRE ENVIRONMENTAL QUALITY



- The built environment is attractive and historic, and is kept to a high standard
- On non-market days (most days of the week), the parked cars within the centre of Market Place detract from the visual quality of the space
- 68% of people stated that the general shopping environment was 'quite good' compared to other towns they visit

SETTLE OVERVIEW

Settle has the second largest town centre within the Craven District, based on the number of retail outlets and has a population of approximately 2,540¹. It is located approximately 21km north-west of Skipton on the edge of (but outside of) the Yorkshire Dales National Park. The village of Giggleswick is located to the north-west of Settle and is separated from the town centre by the River Ribble.

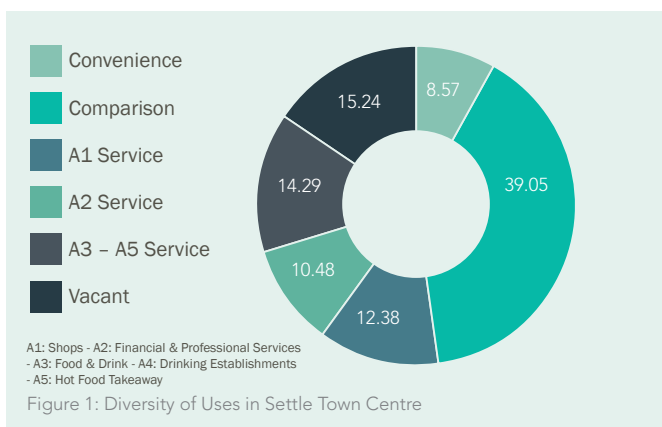
The town caters to a large number of tourists, both those visiting the town centre and those making use of the surrounding countryside or arriving on the Settle to Carlisle railway; a tourist attraction in its own right. The town has a railway station with services to Leeds and Carlisle.

One of the largest employment sites in the District outside of Skipton is located on the western edge of the town centre (Sowarth Industrial Estate).

DIVERSITY OF USES AND PROPORTION OF VACANT STREET LEVEL PROPERTY

Diversity of Uses

The diversity of uses within Settle Town Centre closely matches the national average in most use classes with the exception of A3 – A5 services, which at 14.29% is 5% below the national average, and the proportion of comparison goods stores, which is 4% over the national average.



Use Category	Number of units	Percentage of units in Town Centre	National Average*
Convenience	9	8.57	8.40
Comparison	41	39.05	35.77
A1 Service	13	12.38	12.33
A2 Service	11	10.48	10.75
A3 – A5 Service	15	14.29	19.38
Vacant	16	15.24	11.84

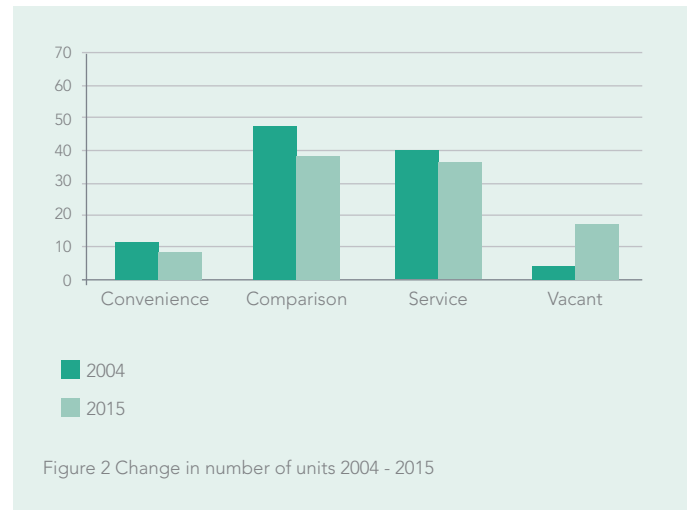
Table 1: Diversity of Uses in Settle Town Centre

Source: NLP / Experian GOAD (2015)

*National Average as provided by GOAD (June 2015).

The comparative lack of A3 – A5 service uses is somewhat surprising given the town's tourist appeal and status as a gateway town to the Yorkshire Dales National Park. With regards to the higher than average number of comparison units, it should be noted that many of these are aimed at the tourist trade and the town includes a high proportion of gift shops and second-hand retailers.

Figure 2 compares the findings of the recent Health Check with those of the 2004 study.



Proportion of Vacant Street Level Property

The proportion of vacant street level property in Settle is 4% above the national average. Figure 2 shows that there has been a large increase in the number of vacant units over the past 11 years, whilst the proportion of all other uses has decreased.

During the undertaking of the health check it was observed that the vacant units comprised a variety of building types and floor plates, and the units were dispersed across the town

centre. The majority of vacant units are being actively marketed and appeared to be well maintained. It is understood that refurbishment works required to the former Settle Library to bring it up to modern retailer/other commercial operator requirements are now complete and the property is being actively marketed.



Figure 3: Former Settle Library



Figure 4: Local Lettings Advertisements

RETAILER REPRESENTATION AND COMMERCIAL RENTS

Retailer Representation and Intentions to Change Representation

Settle Town Centre contains one of the 31 ‘major retailers’ identified by Experian GOAD²² (Boots the Chemist). In addition, it also contains a couple of other national multiples, namely the Co-operative Food, Booths and Premier convenience stores. The remaining retail outlets comprise independent businesses and professional services such as high street banks and estate agents.



Figure 5: National Multiple and Independent Stores, Market Place

Responses to the Business Survey show that almost 10% of businesses have been operating for less than 1 year, and a number of changes were noted between the latest Experian GOAD survey (November 2014) and the resurvey carried out for this health check in June 2015. This indicates a potentially high turnover of businesses within the retail centre and could also partly explain the high proportion of actively marketed vacant units. Most business operators rely predominantly on local residents, with tourists and leisure visitors also making up an important part of the customer base.

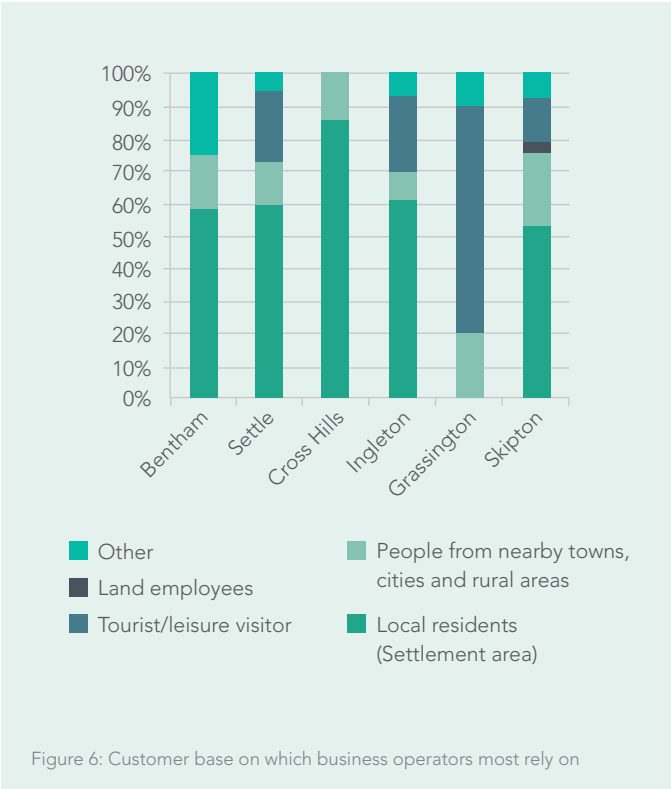


Figure 6: Customer base on which business operators most rely on

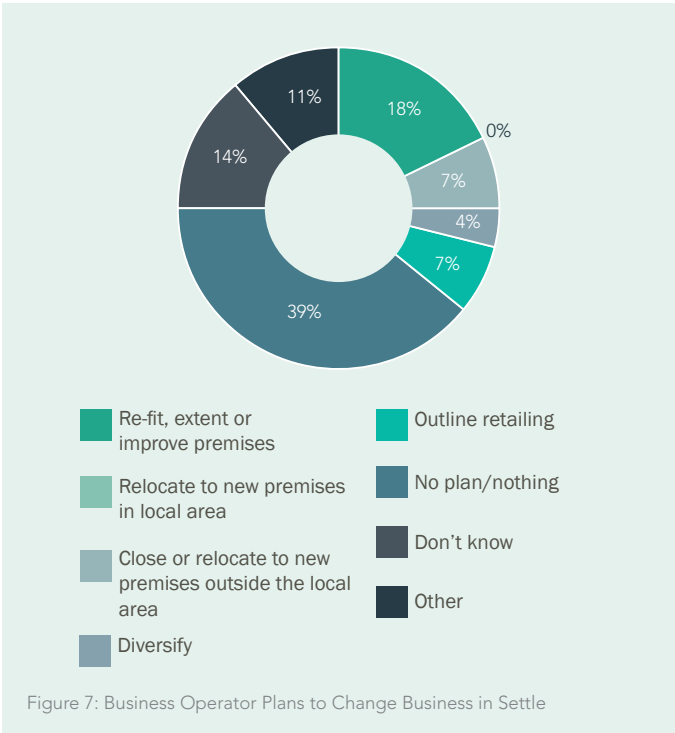


Figure 7: Business Operator Plans to Change Business in Settle

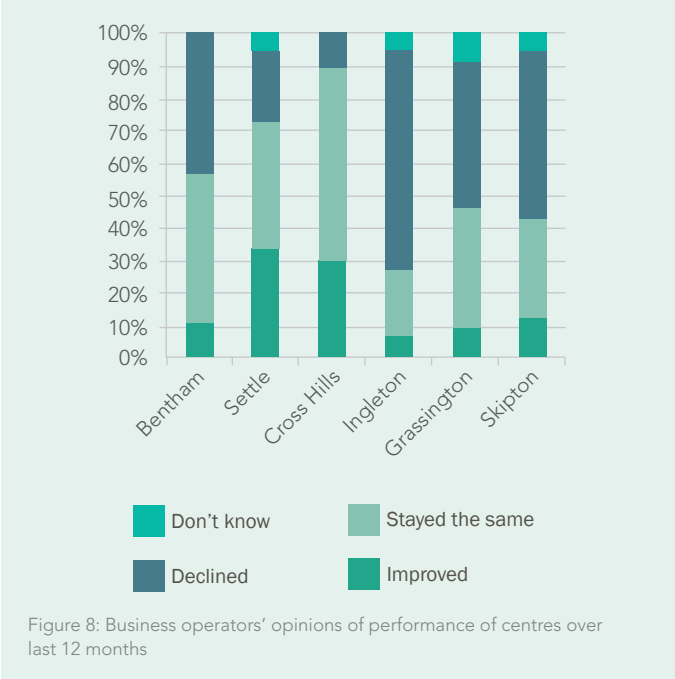
7% of respondents to the Business Survey indicated that they intend to close or relocate to new premises outside the local area, which is the second highest proportion amongst centres in Craven based on the results of the survey. The majority of respondents however stated that they had no plans to change their business (39%), whilst 18% intend to ref-fit, extend or improve their premises.

Commercial Rents

Discussions with local agents have indicated that within Settle (and other settlements in the north-western portion of the District), the timing of enquires agents receive is more seasonally dependent than in Skipton to the south-east. For instance, more shops are occupied temporarily as tourist-related uses. Average rent within Settle reach around £15-25 per square foot, which is similar to Bentham (£20 per square foot) but lower than Skipton (£45-70 per square foot).

Business Operator’s Perceptions of Centre

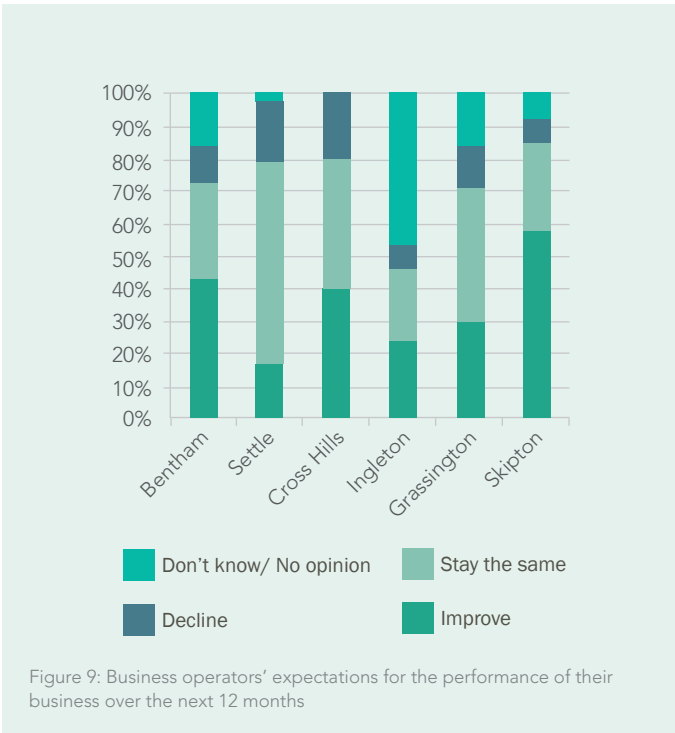
As part of the town centre business surveys, business operators were asked to provide their opinions on the state of the retail centre in which they operate, as well as the performance of their own business.



35% of business operators in Settle believe that the centre has improved over the last 12 months; this is the highest proportion out of the six centres surveyed as part of this study.

Business operators were also asked how they felt the centre could be improved. In Settle, the most popular measure to improve the centre is more flexible car parking (15%), followed by 'greater promotion/marketing of the town' (14%) and increased provision of independent and specialist retailers (12%).

The majority of business operators in Settle who responded to NLP's survey believe that their business performance will remain at around the same level as the previous 12 months (see Figure 9).



Despite the perceived upturn in the performance of the town over the past 12 months, 18% of business operators in Settle expect their own performance to decline in the next 12 months – the highest proportion in the District. This could either be due to a belief that the town cannot maintain the growth and improvement seen over the past 12 months, or a view that the benefits created by an increased performance in the town as a whole will not be shared equally amongst business operators.

The centres which are considered to be the biggest competition to business operators in Settle are (the centre which is considered to be biggest the competition is listed first):

1. Skipton
2. Kirkby Lonsdale
3. Internet / mail order

The results of the household survey (see main report and accompanying appendices) show that, in terms of comparison shopping, the majority of comparison expenditure drawn away from Settle is spent in Skipton and Leeds.

ACCESSIBILITY

Vehicular Accessibility

Settle has 287 car parking spaces across three main car parks (Ashfield, Greenfoot and Whitefriars). Coach parking is available at Whitefriars. On street parking is available on some of the side streets away from Market Place, and also on Market Place itself on non-market days. Car parking charges don't apply between 6pm and 9am. The overnight ticket allows parking between 4pm & 10pm.



Figure 10: Market Place Road Closed on Market Day

Settle is served by a railway station and bus services which stop at Market Place, linking the town with Skipton and Kirkby Lonsdale. The Settle to Carlisle Railway is an important tourist attraction which attracts visitors to Settle in its own right.



Figure 11: Bus Services in Market Place

Analysis of the results of the in-street surveys shows a broad spread of modes of transport used by visitors to the town. This is shown in Figure 8.

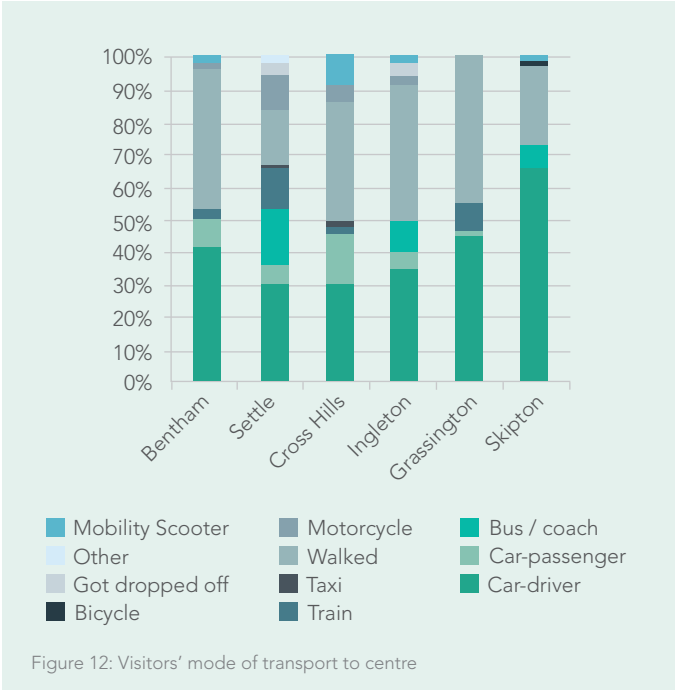


Figure 12: Visitors' mode of transport to centre

Of the respondents which had driven into Settle, most (25%) had parked on-street in free parking spaces, followed by 22.2% who had parked in the Ashfield car park.

The majority of respondents stated that they felt the accessibility of Settle by car, the availability of parking and the parking charges were either quite good or very good compared to other towns they regularly visit (40% of respondents said that they also visit Skipton regularly for shopping/leisure and it is therefore likely that a high proportion of respondents will have compared the accessibility of Settle by car to Skipton).

Pedestrian Flows

Market research company NEMS has conducted pedestrian counts in Settle over a period of 4 days at 12 different locations within the town centre. A plan of the locations is included at Appendix 2.

Footfall was found to be highest outside Skipton Building Society on both market and non-market days. Footfall was also high outside the Co-op food store on the Market Place and outside the Creative Hair Studio on Kirkgate on non-market days, however the amount of passing trade fell in these locations on market day (by 67% outside Co-op and 8% outside Creative Hair Studio). The fall in pedestrian movements outside of the Co-op on market day may potentially be due to the restriction on parking in the Market Place. The areas which saw the biggest change in footfall from non-market to market days were The Old Post Office, Duke Street (81% higher on market day) and outside Castleberg Sports (47% higher on market day).

Outside of the Nail and Beauty Studio on Station Road and The Old Post Office, Duke Street were generally the quietest places on both market and non-market days. All areas were significantly busier on the Saturday, with the exception of High Street, which leads to a more residential area of town.

During the evening, three of the 12 locations monitored were busier than they were during the day; these were outside of the Co-op food store and Corner News on Market Place, and the Nail and Beauty Studio on Station Road. One reason for this could be the trade generated by the convenience stores themselves, as most of units would have been closed at that time. Visitors walking to/from the train station and Ashfield car park could also make up a large proportion of footfall outside the Nail and Beauty Studio. Footfall outside of the Ye Old Naked Man Café, one of the most well-known leisure venues in Settle, fell by 88% during the evening.



Figure 13: Market Place on non-market day - dominated by cars, not people

	Location	Mon 15th June	Tues 23rd June*	Sat 20th June	Sat 20th June (Evening)
1	The Lingerie Room, 6 High Street	120	112	80	72
2	Castleberg Sports, Cheapside	132	248	128	84
3	Co-Op Foodmarket, Market Place	180	108	156	186
4	Corner News, Market Place	132	208	156	234
5	Dales Picture Shop, 1 Church Street	102	168	204	102
6	Ye Olde Naked Man Cafe	172	248	292	36
7	Creative Hair Studio, 11 Kirkgate	168	156	184	66
8	Skipton Building Society, 2 Duke Street	180	252	312	102
9	Spar, 1 Duke Street	128	252	216	210
10	The Old Post Office (House number 39)	16	84	114	6
11	8 Station Road	104	114	150	96
12	Nail and Beauty Studio, Station Road	68	132	84	114

Table 4: Average left and right pedestrian movements per hour

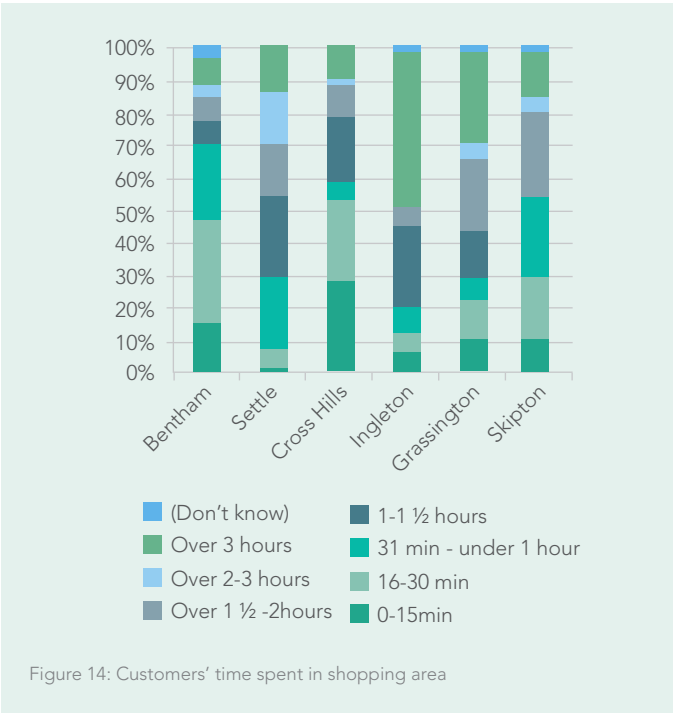
*Market days

CUSTOMERS' VIEWS AND BEHAVIOUR, AND PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME

Customers' Views and Behaviour

45% of people surveyed were visiting Settle as tourists (the most commonly cited reason for visiting being the attractive environment), with only 29% of people visiting primarily to shop (for either food items, non-food or both). However, 62% of respondents (including tourists) stated that they intended to do some shopping whilst they were in the town centre.

On average customers were found to be spending between 1 hour and 90 minutes in the town centre, although 44% of people intended to stay longer than this. 67% of visitors intended to visit leisure facilities whilst they were in the town centre, and 68.7% of those respondents planned to visit a restaurant or café; which may explain the high proportion of people who intend to spend more than two hours in the town centre.

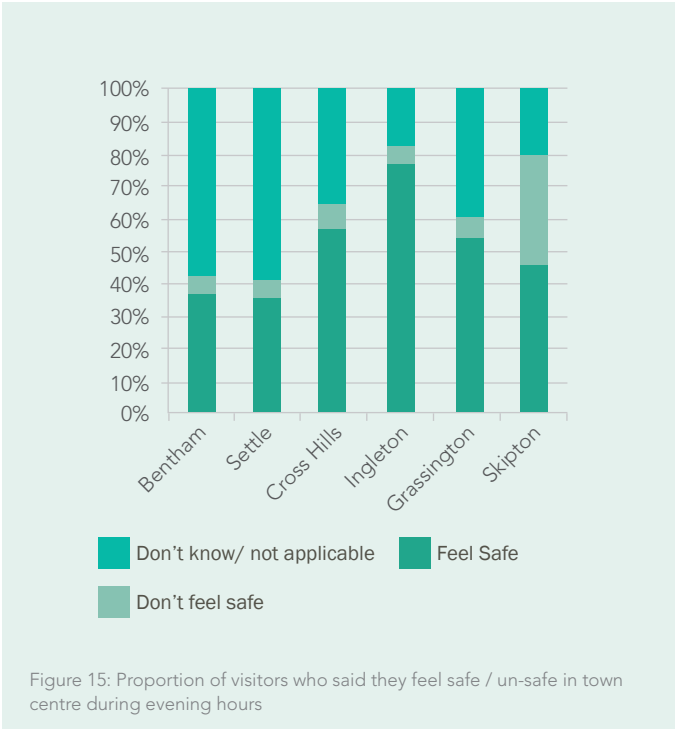


Customers' views of both the range and quality of food and non-food shops were positive, and the only area of Settle's retail provision which was deemed to be lacking when compared with other towns, was its range of retail warehousing/retail parks. This is reflective of its rural nature and a lack of provision in this sector. 93% of those surveyed felt that Settle's market was either quite good or very good.

The majority of people surveyed (73%) did not ever visit Settle town centre in the evenings, and consequently many people answered that they did not know how the evening entertainment and leisure facilities compared to other towns.

Perception of Safety and Occurrence of Crime

Settle is considered to feel safe and welcoming in general terms. During the NLP site visit no signs of graffiti, vandalism or antisocial behaviour were observed.



Almost all of those surveyed (98%) said that they felt safe walking around the town centre during the day. 5% said that they didn't feel safe during the evening; 59% answered that they did not know (presumably because they never visit the centre on an evening). Suggested measures to improve the perception of safety in Settle were met with indifference by those who were surveyed; over 80% of people said that increased police presence or CCTV use would not make them feel any safer.

State of Town Centre Environmental Quality

The core retail area of Settle focusses around the Market Place and the adjoining streets and courtyards, creating a compact urban layout. The built environment is considered to be attractive, benefits from its historic nature, and is kept to a high standard. Many of the buildings which surround the Market Place are statutorily listed, as is the fountain in the centre of the square.



Figure 16: Courtyard off Church Street

The historic character of the buildings creates an evidently attractive shopping environment, but, at the same time, means that many of the retail units do not meet modern retailer standards. On non-market days (most days of the week), parked cars within the centre of the Market Place detract from the visual quality of the space, and also add to traffic congestion problems which can make it difficult for shoppers to cross from one side of the Market Place to the other. There is a consistent approach to street furniture, which is of a high quality.

The appreciation of the general shopping environment was shared amongst the participants of the in-street survey, with 68% of people stating that it is 'quite good' compared to other towns they visit, and 25% stating that it was 'very good'. The attractiveness of the built environment, planting/landscaping and layout of the centre are also considered favourably.



Figure 17: Street Furniture



Figure 18: Fountain

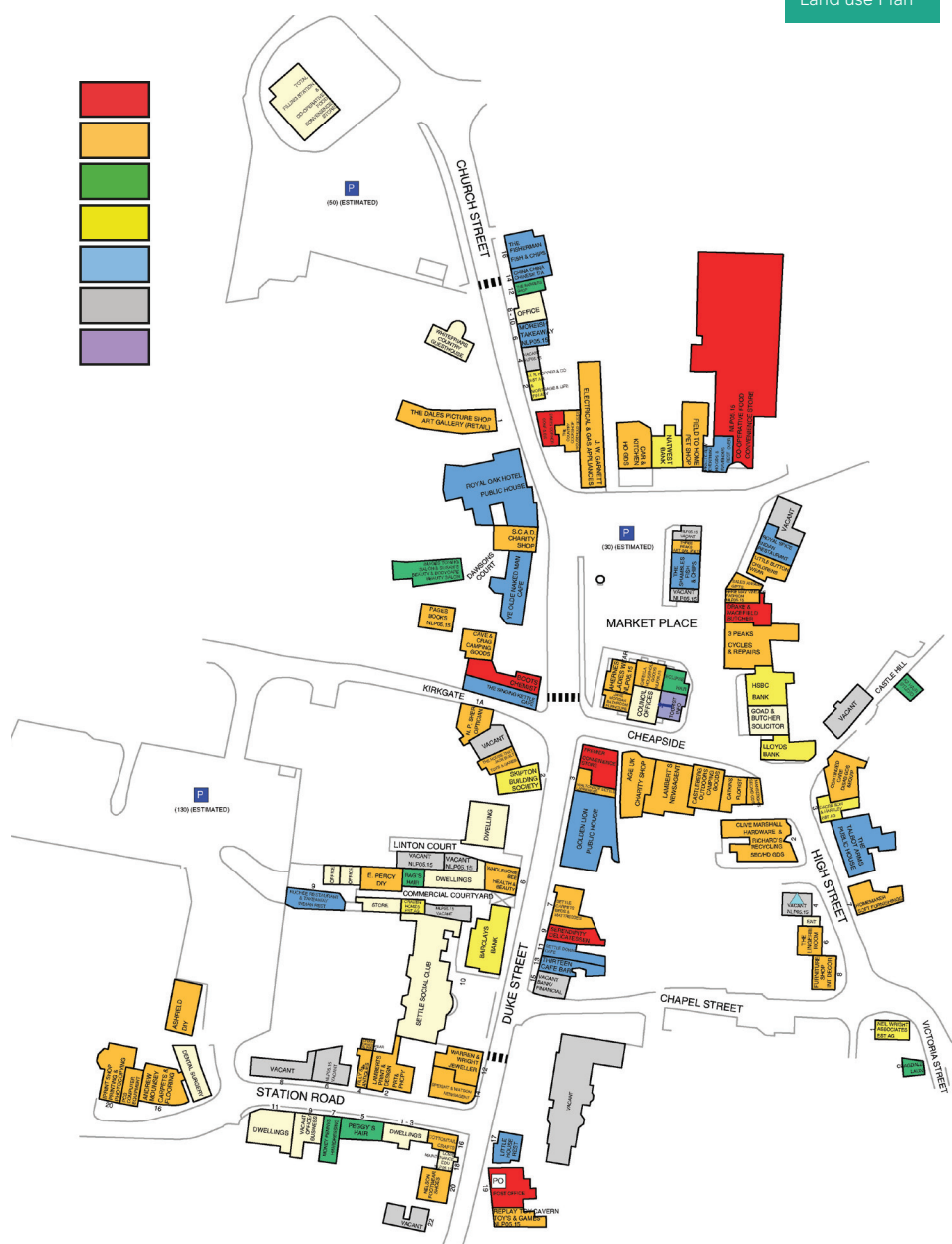
DIGITAL HEALTH

Data from Ofcom shows that Settle town centre is presently well covered by a high speed 4G mobile network (on EE). This will enable shoppers to compare products online whilst they shop and place orders for products to be delivered to their homes or collection points. Despite this healthy high speed mobile internet coverage, only one wi-fi hot spot is shown on The Cloud hot spot map. There is, however, a free wi-fi public hot spot within the town centre which is run by Clannet, a North Yorkshire based wireless company.

There is one post office in Settle which shoppers could use for the collection of online orders, however there isn't a CollectPlus collection point for online shopping deliveries. This limits the opportunities for people to conveniently shop online. An existing store (such as the Premier) or a community building provide opportunities for the introduction of collection facilities.



- Convenience
Comparison
A1 Service
A2 Service
A3-A5 Service
Vacant
Misc



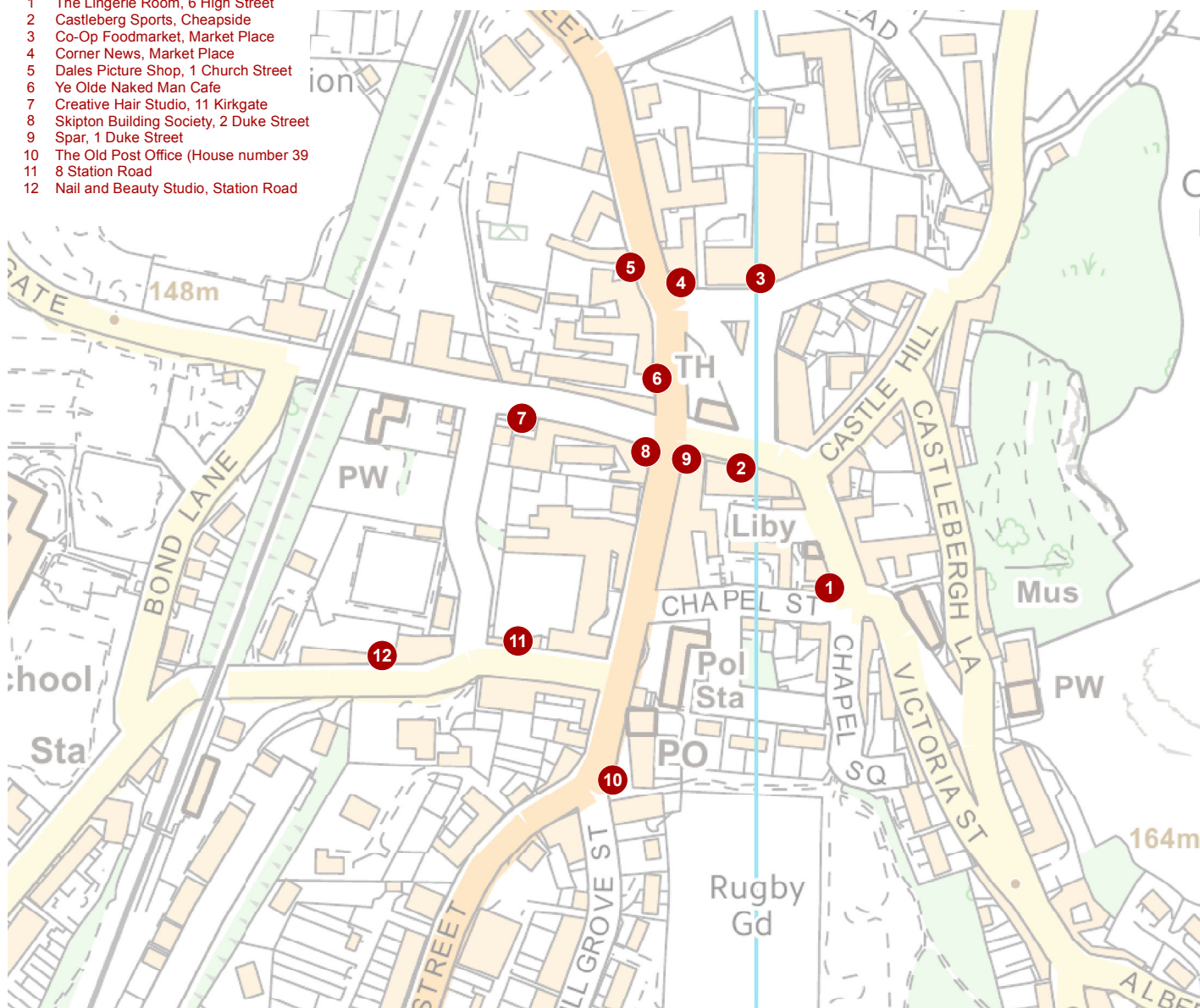
Land use Plan

PEDESTRIAN COUNT LOCATION

Key

● Pedestrian Count Location

- 1 The Lingerie Room, 6 High Street
- 2 Castleberg Sports, Cheapside
- 3 Co-Op Foodmarket, Market Place
- 4 Corner News, Market Place
- 5 Dales Picture Shop, 1 Church Street
- 6 Ye Olde Naked Man Cafe
- 7 Creative Hair Studio, 11 Kirkgate
- 8 Skipton Building Society, 2 Duke Street
- 9 Spar, 1 Duke Street
- 10 The Old Post Office (House number 39)
- 11 8 Station Road
- 12 Nail and Beauty Studio, Station Road



FOOTNOTES

1
Population estimate for 2013 as at 30th June 2012, Office for National Statistics

2
It should be noted that whilst the GOAD list of 31 major retailers is a helpful indicator of the presence of established high street multiples in a centre, the list has not been updated for a number of years. The list still includes Phones 4 U, which ceased operations in September 2014, and HMV which only has a handful of stores in its new guise. The full list can be viewed within the appendices of the 2015 Study.



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