



Nathaniel Lichfield
& Partners

Planning. Design. Economics.

SKIPTON TOWN CENTRE HEALTH CHECK

FEBRUARY 2016



Skipton Town Centre Health Check

This town centre health check provides a snapshot of the current health of Skipton 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.

For brevity, the primary information collected has been summarised in this document, however, full raw data sets are included as technical appendices to the accompanying 2015 Retail and Leisure Study (the 2015 Study). The findings are summarised in an Infographic, with further analysis, commentary, photographs and an up-to-date town centre land use plan set out across the pages that follow the Infographic.

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

The Skipton Town Centre Health Check is focussed on the Town Centre as defined by Experian GOAD. NLP completed its health check site visit on Friday 29 May 2015 (market day) between 2:00pm and 4:00pm.



Skipton Town Centre Health Check

Key Indicators

01 DIVERSITY OF USES

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



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

- Above average provision of both convenience and comparison retail units
- Number of A1 service and A3 – A5 services uses is close to the national average
- Provision of A2 service uses is below the national average

02 PROPORTION OF VACANT STREET LEVEL PROPERTY



8.50% Skipton

11.84% National Average

03 CUSTOMERS' VIEWS AND BEHAVIOUR



- clear support for the range and quality of food and non-food shops
- 81% of people spend less than 1 hour 30 minutes in the shopping area

04 RETAILER REPRESENTATION AND INTENTIONS TO CHANGE REPRESENTATION



13 of the 31 (42%)
'major retailers' identified by GOAD.

- Good proportion of independent shops
- 6% of businesses looking to relocate within local area, 3% wish to move outside local area

05 COMMERCIAL RENTS



- Skipton is a very popular choice amongst retailers
- Average rental rates vary between £45-70 per sq.ft - the highest in the District

06 PEDESTRIAN FLOWS

- High footfall along central section of High Street and Sheep Street on market days.
- Water Street, Coach Street and north eastern section of High Street quiet on weekdays but pedestrian flows increase in these areas significantly on weekends.
- Central and southern sections of the High Street and Caroline Square busiest during evening hours.



07 ACCESSIBILITY



- There are a range of short & long stay car parks in Skipton.
- Overnight and weekend charging could discourage consumers.
- 67% travel to the centre by car

08 PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME



- No signs of graffiti, vandalism or anti-social behaviour observed.
- 34% of people do not feel safe walking around the Town Centre during the evening

09 STATE OF TOWN CENTRE ENVIRONMENTAL QUALITY



- High Street and Setts provide a very attractive and well maintained shopping environment.
- Streets to the south of the High Street and in the vicinity of the Bus Station have a more run down appearance.
- Majority of customers feel the town and general shopping environment is attractive

SKIPTON OVERVIEW

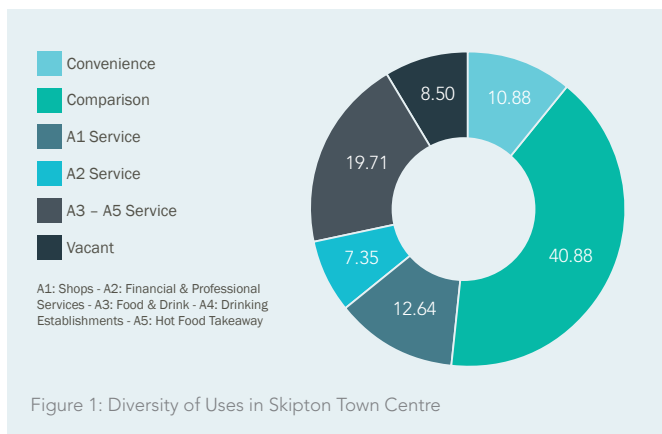
Skipton is the principal town within the District and is considerably larger than the other five settlements assessed in the 2015 Study with a population of approximately 14,680¹. Approximately 26% of the District's population live within Skipton and it acts as the administrative and commercial hub of Craven. The town draws visitors for both retail and tourism purposes and the level of service provision is higher compared to other centres in the District, and is commensurate with the size of the centre.

It is located within the south of the District and is well served by the strategic road network which enables shoppers to readily access the centre from surrounding areas such as Keighley and Colne. Skipton railway station provides rail access to towns and cities south of the District, as well as some direct services to London.

DIVERSITY OF USES AND PROPORTION OF VACANT STREET LEVEL PROPERTY

Diversity of Uses

The diversity of main town centre uses in Skipton is shown in the below chart and table.



Use Category	Number of units	Percentage of units in Town Centre	National Average*
Convenience	37	10.85	8.40
Comparison	139	40.76	35.77
A1 Service	44	12.90	12.33
A2 Service	25	7.33	10.75
A3 – A5 Service	67	19.65	19.38
Vacant	29	8.50	11.84

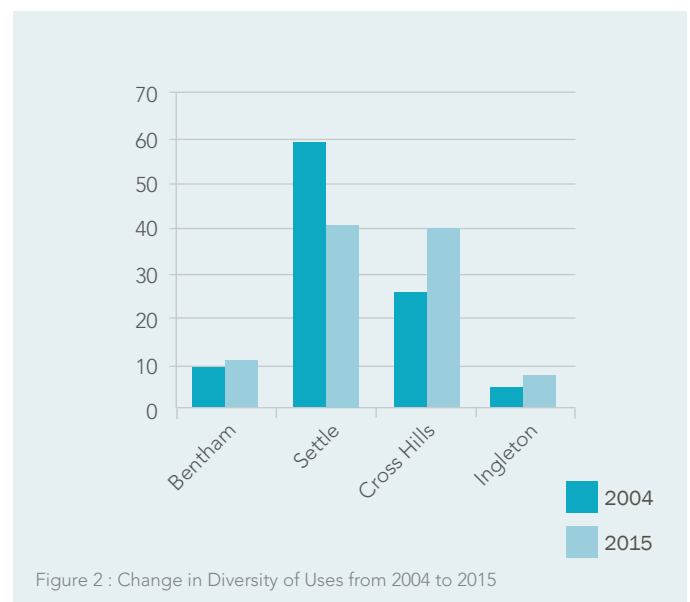
Table 1: Diversity of Uses in Skipton Town Centre

Source: NLP / Experian GOAD 2015¹

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

Skipton has above average provision of both convenience and comparison retail units. The number of A1 service and A3 – A5 service uses is around the national average.

Charity shops account for 8.6% of comparison units in Skipton. NLP estimates that, nationally, charity shops account for approximately 4.4% of comparison goods stores. Comparing the results to the 2004 study, it can be seen that whilst the number of convenience outlets has remained constant, the number of comparison goods stores has fallen by almost 20% (see Figure 1.2). This is in line with national trends and it is likely that many of the units have been taken over by A3 – A5 service uses, which continue to increase nationally in number/proportion of town centre units year on year.



The number of A2 service uses within the town centre has fallen to some way below the national average, suggesting that these uses may be increasingly concentrated in higher order centres to the south and east, such as Harrogate, Bradford and Leeds.

Proportion of Vacant Street Level Property

The vacancy rate is very low compared to the national average and indicates a strong retail market within the town, although it should be noted that the number of vacant units has almost doubled since the publication of the 2004 study.

There are 29 vacant units within Skipton Town Centre (8.5% of the total town centre units surveyed). Vacant units can be found across the town centre, however particular concentrations are located in the area around Belmont Street/Belmont Bridge and also at the rear and upper floor of the Craven Court Shopping Centre. The concentration of vacancies within the shopping centre is somewhat surprising given that it fronts onto one of the busiest shopping frontages within the town centre. This

suggests that there may be issues with the accessibility of the centre, both in terms of the difficulty in reaching the upper floor for disabled users and also the recognition amongst shoppers of the entrance from Otley Street. The latter may be improved through more eye-catching signage and advertising.

The majority of vacant units appear to be actively marketed, and some appear to have been recently let/sold or are under offer (such as the former Coach House and Courtyard to the rear of the Town Hall). Given the historic layout and nature of the built environment in Skipton, many of the vacant units have small floorplates and may not meet modern retailer requirements, although many have attractive frontages.



Figure 3: Vacant units and low footfall in Craven Court Shopping Centre



Figure 4: Former Coach House and Courtyard, recently sold

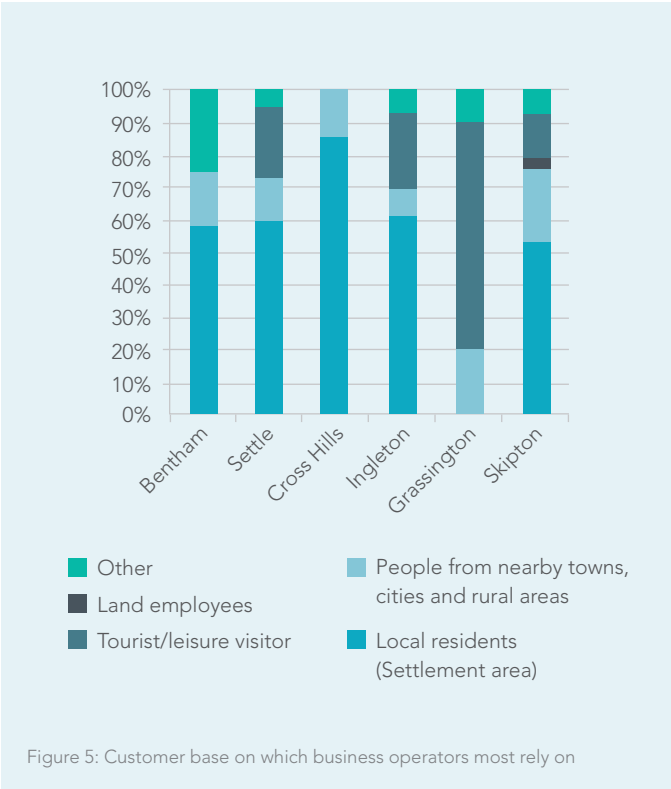
RETAILER REPRESENTATION AND COMMERCIAL RENTS

Retailer Representation and Intentions to Change Representation

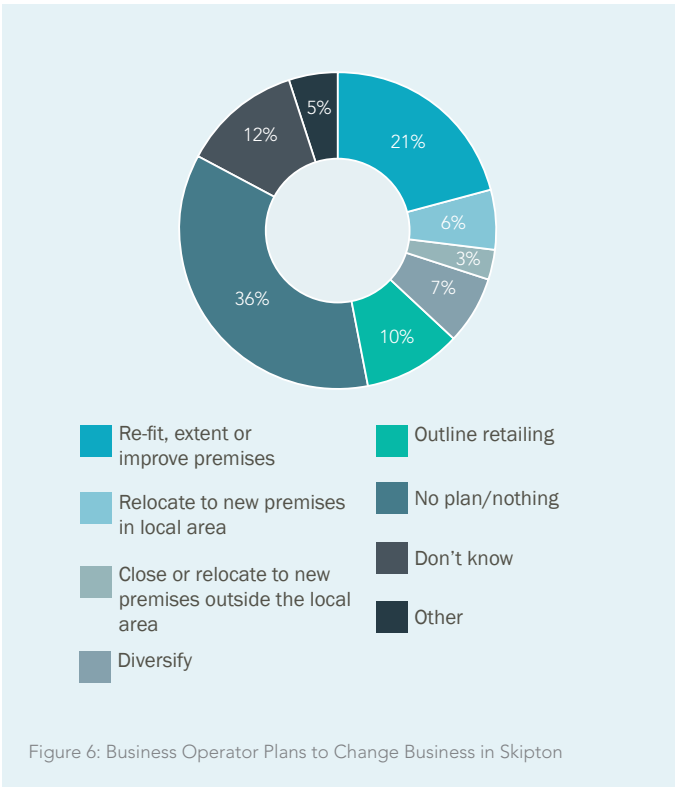
Skipton Town Centre contains 13 of the 31 (42%) ‘major retailers’ identified by GOAD⁴. This includes large convenience stores such as the Tesco supermarket on Craven Street and the Marks and Spencer Simply Food at Thanets Yard. The Rackhams Department Store (House of Fraser) on the High Street is a major anchor in Skipton’s retail offer. The Albion Place development has brought an increased presence of national multiples to Skipton.

In addition to a modest number of major retailers, the town centre also includes a good proportion of independents, with 25% of the respondents to the Business Survey being sole proprietorships. According to the results of NLP’s business survey, Skipton has the highest proportion of leased premises in the district.

The majority of businesses tend to rely on local residents, although people from nearby towns, cities and rural areas and tourist/leisure visitors are also of significant importance to business operators (see Figure 5).



The majority of business owners who responded to the Business Survey in Skipton stated that they had no current plans to change their business. 21% of respondents answered that they had plans to re-fit, extend or improve their premises and 9% had plans to relocate (6% within the local area and only 3% to a new premises outside the local area). 7% of respondents are looking to diversify, while 9% plan to go into online retailing. This reflects a healthy picture of the perception of the performance of the retail/leisure sector within Skipton.



Commercial Rents

Discussions with local agents have confirmed that Skipton remains a very popular choice amongst retailers catering to both the large numbers of indigenous residents it has (due to it being the largest settlement in the District by a considerable margin) in addition to the tourists that visit it throughout the year. Skipton also has a larger proportion of national firms compared with other settlements in the District. Rental rates within Skipton vary between around £45-70 per square foot, the highest in the District. This compares to retail rates of £15-25 per square foot in Settle and £20 per square foot in Bentham.

Rents and overheads were cited as the most important issue constraining the operation and performance of businesses in Skipton in the Business Surveys. Skipton is the only settlement in Craven District where this issue was identified as the biggest burden on business operation.

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.

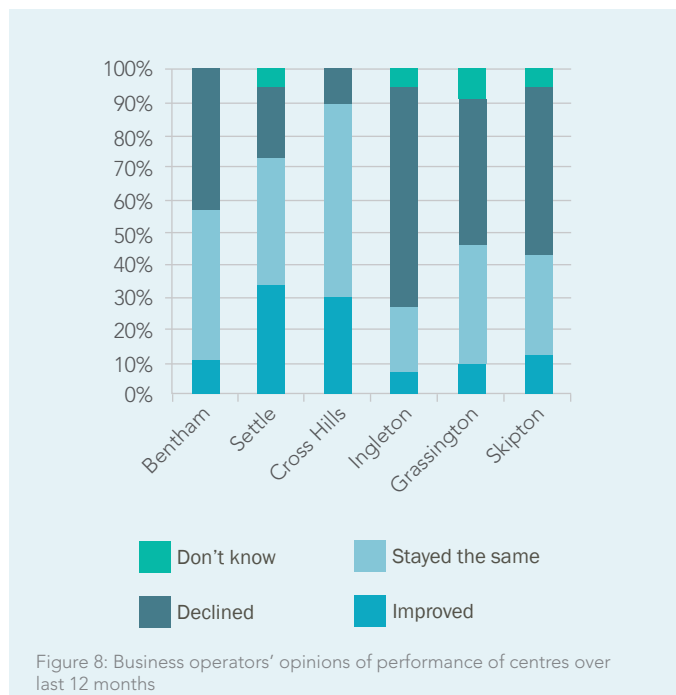


Figure 8: Business operators' opinions of performance of centres over last 12 months

Half of the respondents to the business survey in Skipton (51%) believe that the centre has declined over the past 12 months. This is the second highest proportion in the study area, behind Ingleton.

Business operators were also asked how they felt the centre could be improved. In Skipton, the most popular measure to improve the centre is more flexible car parking (27%), followed by an increased choice/range of shops (20%) and more independent/specialist retailers (19%). As discussed below, car parking charges were also a contentious issue for a high proportion of shoppers in Skipton.

Despite the somewhat negative view of the performance of Skipton town centre over the past 12 months exhibited by the majority of business owners, 58% of business owners expect their business performance to improve in the next 12 months (see Figure 9).

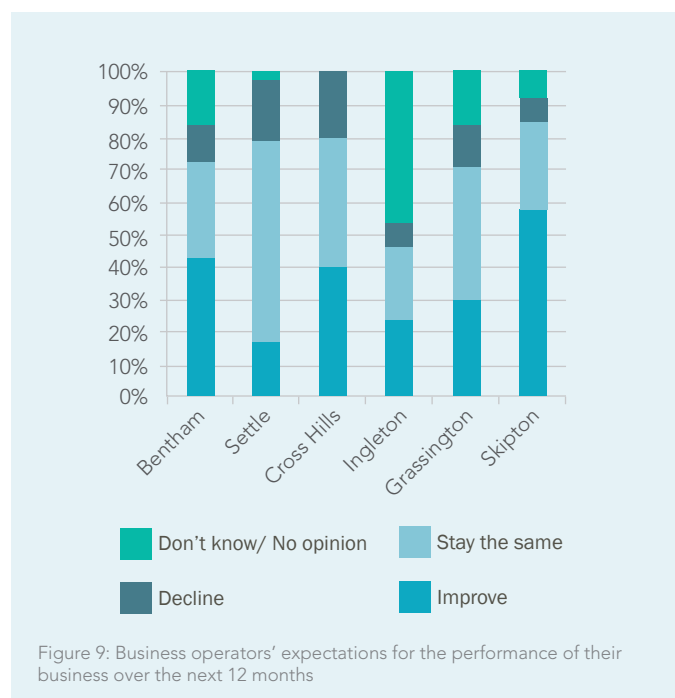


Figure 9: Business operators' expectations for the performance of their business over the next 12 months

The optimistic outlook of the majority of business owners in Skipton could be due to a combination of a perceived macro-economic upturn, as well as the knock-on effect of the opening of the Albion Place development.

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

1. Ilkley
2. Harrogate
3. Internet / mail order

It is interesting to note that, despite the views of business operators indicated above, the results of the household survey (see main report and accompanying appendices) indicate that the majority of comparison expenditure drawn away from Skipton is spent in Keighley rather than Ilkley or Harrogate.



Figure 10: Vacant unit on High Street

ACCESSIBILITY

Vehicular Accessibility

There are 6 car parks within Skipton, (including the Craven Swimming Pool & Fitness Centre car park) offering 1,052 car parking spaces. There are also a number of private car parks such as B&M Bargains, Tesco and Morrisons, all of which have restrictions such as limiting the amount of time they allow for parking. Only 12 designated coach parking spaces are available, which is low given the size of the town and the comparative provision in other settlements within Craven. This is acknowledged in the Council's Car Parking Strategy as an area for improvement. However, there are arrangements for coach drop off and laying over at Skipton Auction Market. Some on street parking is available, including along High Street on non-market days; this is managed by North Yorkshire County Council.

Parking charges within Skipton are higher than in neighbouring towns, including Burnley, Harrogate, Ilkley, Keighley and Lancaster. However, a pop and shop service is offered in the High Street car park, which offers 30 minutes parking for £0.20. Car parking charges do not apply between 6pm and 9am. The overnight ticket allows parking between 4pm and 10am.

Skipton	Burnley	Harrogate	Ilkley	Keighley	Lancaster
£1.10	£0.80	£0.70	£0.70	£0.50	£0.70

Table 2: Comparison of Parking Charges (per hour - cheapest available town centre car parks)

During the site visit it was observed that traffic congestion was relatively high at the junction at the southern end of High Street, with tailbacks along Newmarket Street.



Figure 11: Queuing traffic along Newmarket Street

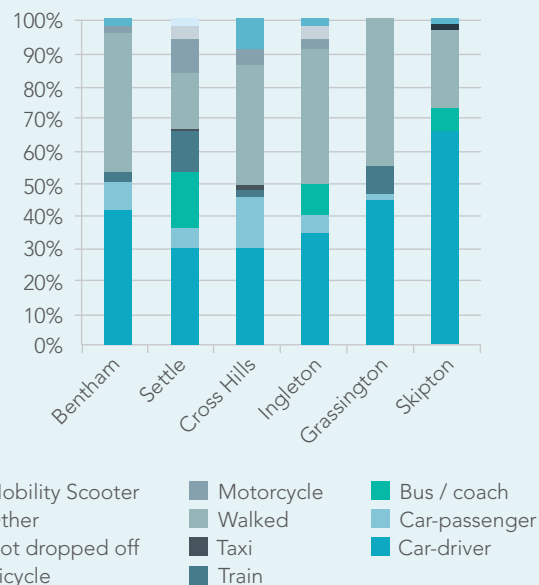


Figure 12: Visitors' mode of transport to centre

67% of respondents to the in-street survey said that they had driven in to Skipton on that day (the highest proportion of car drivers out of the six centres studied), with 92% of those who had driven parking their car in the Tesco car park on Craven Street. This is an unexpectedly high figure.

Data provided by Craven District Council (see table 3 below) shows that across the period when NEMS conducted its in street surveys, the three larger car parks in Skipton issued an average of 1,670 tickets per day.

Date	High Street Total Transactions	Coach Street Total Transactions	Cavendish Street Total Transactions
4th July 2015	1371	813	275
5th July 2015	906	723	127
6th July 2015	1062	445	84
7th July 2015	691	325	69
8th July 2015	1009	425	114

Table 3: Number of tickets issued at Council run car parks

Whilst it is clear that the Tesco car park is popular with shoppers due to it offering free parking, it is not likely that an average of 92% of visitors arriving at Skipton by car choose to park at Tesco, as this would equate to over 20,500 cars arriving at the town each day over the above period. The figure gathered by the in street survey is therefore an important indicator of the popularity of the Tesco car park, but it is likely a much lower figure would be achieved if the sample size was increased.

On the whole, members of the public stated that the availability of parking was either average (43%), good (20%), or very good (15%). However, it was the parking charges enforced which were of most concerns to shoppers, with 41% of those surveyed commenting that parking charges were either quite poor, or very poor. However, as mentioned earlier, a pop and shop service offers short-stay parking for just £0.20.

Skipton Town Centre is relatively easily accessible by public transport from the south. The bus station is located to the south of the High Street. Skipton railway station, which is located to the west of the core retail area, offers direct services to Leeds, Bradford and London. However, rail journeys between Skipton, Hellifield and Settle to the north often operate on a frequency of less than one journey per hour. This could discourage residents of settlements in the north of Craven District to access Skipton by rail, and may also influence people in Skipton to only consider travelling to destinations south of Skipton by rail, rather than north. The results of the in-street survey show that only 6% of people surveyed had travelled to the town by bus (0% by train).

Pedestrian Flows

Market research company NEMS conducted pedestrian counts in Skipton over a period of 4 days at 15 different locations within the town centre. A plan of the locations is included on page 13.

The counts show that on weekday market days, footfall is highest outside Rackhams Department Store on High Street and along Sheep Street. On these days, the streets with the lowest recorded pedestrian flows are Water Street and, perhaps surprisingly, outside Edinburgh Woollen Mill at the south of the High Street and Savage Crangle Solicitors, at the northern end of High Street.

On non-market days, pedestrian flow outside of Rackhams and along Sheep Street reduces significantly. However, some areas maintain their levels of footfall, notably along Jerry Croft and also Broughton Road and Swadford Street. These streets provide access to major car parks or transport connections (Railway Station) which may explain their high retention of footfall.

Those parts of the town centre which have the lowest levels of footfall on weekdays (Water Street and the northern and southern ends of High Street) see a significant increase in footfall on weekends. The proximity of these locations to tourist attractions such as Skipton Castle and the canal side suggest that the increase in footfall in these areas on weekends is generated by day visitors to Skipton from outside the immediate area in addition to local residents.

During the evening, the areas busiest with pedestrians are the central and southern sections of the High Street and Caroline Square. The northern end of High Street and Coach Street are among the areas with least footfall.

	Location	Fri 12th June*	Tues 16th June	Sat 20th June*	Sat 12th June (Evening)
1	Belmont of Skipton, 47-53 Broughton Road	378	360	252	48
2	The Craven Bakery, 5-7 Swadford Street	474	444	480	60
3	Superdrug, 77-79 Newmarket Street	684	624	396	114
4	Art Shop, 24A Newmarket Street	702	306	360	84
5	Abbey / Santander, 67 High Street	768	678	564	90
6	Edinburgh Woollen Mill, 86 High Street	294	210	492	102
7	Rackhams, 33-41 High Street	1236	510	396	138
8	M&S Simply Food, Jerry Croft	768	750	300	42
9	Savage Crangle Solicitor, 15 High Street	222	66	372	24
10	David Goldie Outdoorwear, 4-6 High Street	510	366	444	48
11	Next, 36 High Street	810	600	456	60
12	Vision Express, 2 Sheep Street	1020	786	384	60
13	Café Nero, 40-42 Sheep Street	1104	534	372	96
14	Oswaldtwistle Mills of Skipton, 15-17 Coach Street	342	282	348	24
15	22 Water Street	168	132	216	36

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

In terms of customer views on the current provision of retail and leisure facilities within Skipton town centre, when compared to other centres they regularly visit, there is clear support for the range and quality of food and non-food shops. Less than 10% of people surveyed stated they were dissatisfied with the range and quality of these shop types. The range of retail warehousing/retail parks was stated to be quite good or very good by 21% of respondents, with 47% of respondents indicating that they were neither good nor bad.

Customers showed greater dissatisfaction with the current provision of theatres and cinemas, although it should be noted that in each case more than a quarter of respondents answered that they didn't know how the provision compared to other centres.

Looking at leisure uses more generally, customers felt that Skipton town centre compared favourably to other town centres they visit in terms of town centre events, range and quality of places to eat and drink and liveliness/street life and character.

Customers were asked which improvements they would like to see made in Skipton Town Centre. The most popular suggestions were:

- Improve car parking availability / reduce parking charges (25%);
- Improve quality of shops and services (13%); and
- Improve the Market (10%).

An important point to raise in terms of customers behaviour is the amount of time they spend in the Town Centre (see Figure 13). A considerable majority of people surveyed (81%) spent fewer than 90 minutes in the shopping area.

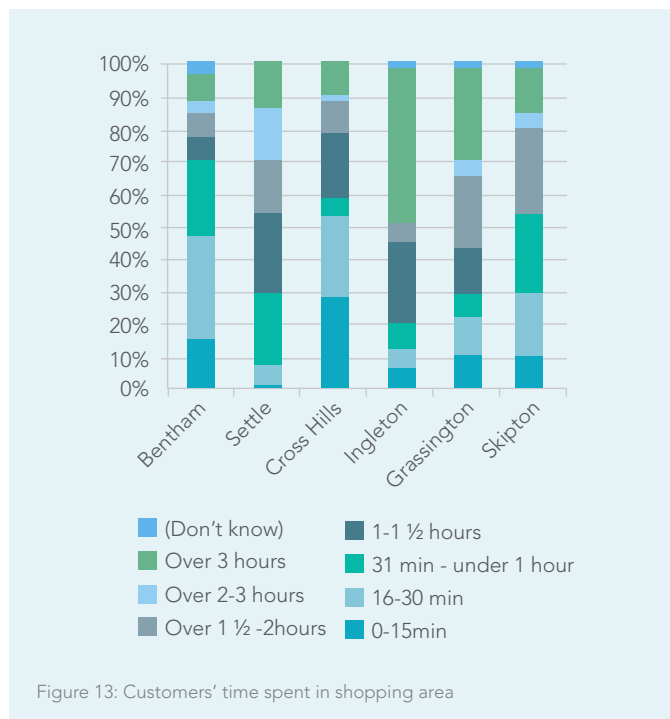


Figure 13: Customers' time spent in shopping area

Perception of Safety and Occurrence of Crime

For a town of its size, Skipton feels safe and welcoming in virtually all areas of the Town Centre. During the site visit no signs of graffiti, vandalism or anti-social behaviour were observed. CCTV was in place outside the Kooky nightclub, suggesting the potential for anti-social behaviour later at night in that area.

This perception of safety was shared with respondents to the in-street survey, with 100% of people answering that they felt generally safe walking around Skipton town centre during the day. However, 34% of people did not feel safe walking around the town centre during the evening (see Figure 14).

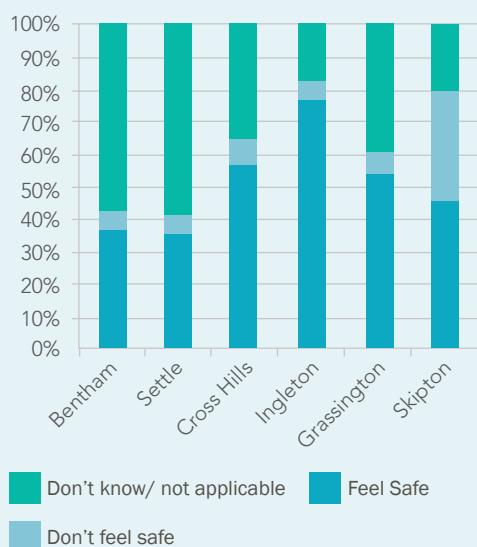


Figure 14: Proportion of visitors who said they feel safe / un-safe in town centre during evening hours

Of those who answered that they didn't feel safe during the evening, the majority were over the age of 55. Increased CCTV use is the most popular measure for improving the feeling of safety, with 64% of people surveyed stating that it would make them feel safer in the town centre. The majority of respondents also stated that improved street lighting and increased policing would make them feel safer.

State of Town Centre Environmental Quality

The environmental quality of the Core Retail area is kept to a high standard, with High Street and the Setts, and the side streets to the immediate east and west providing an evidently attractive and well maintained shopping environment. Street furniture is of a reasonable standard, and the natural environment has been used to good effect to provide a more tranquil setting for retail and leisure uses along the canal and at Mill Bridge/Water Street.

The streets to the south of the High Street and in the vicinity of the bus station (Devonshire Place, Keighley Road and Sackville Street) have a more run down appearance, and the units are occupied by lower-value businesses with a high concentration of A5 uses. Some of the ginnels which connect the High Street/ Sheep Street to the courts and terraces to the west are dark and lack appropriate signposting to the uses on the other side, which could limit footfall to the units around Victoria Square, which was quiet at the time of the site visit undertaken by NLP.



Figure 15: High Corn Mill

Respondents to the in-street survey demonstrated overwhelming support towards the attractiveness of the built environment, general shopping environment and planting and landscaping compared to other town centres. On a more negative note, the provision of public toilets was cited as an issue (31% stating provision was very poor compared to other centres they visit).



Figure 16: Ginnel to Victoria Square

DIGITAL HEALTH

Data from Ofcom shows that the centre has good 4G coverage. A number of retailers and A3 – A5 service providers also offer public wi-fi hotspots via The Cloud, and these are mainly located along the High Street.

Click and collect facilities are available within major high street retailer's stores in Skipton, including Next, Marks and Spencer, and Tesco. There are also two CollectPlus locations in Skipton, namely The Paper Shop on Sun Moor Drive, and Martins on Keighley Road to the south of High Street. These facilities enable shoppers to purchase goods online and collect from a location and at a time which is convenient for them.

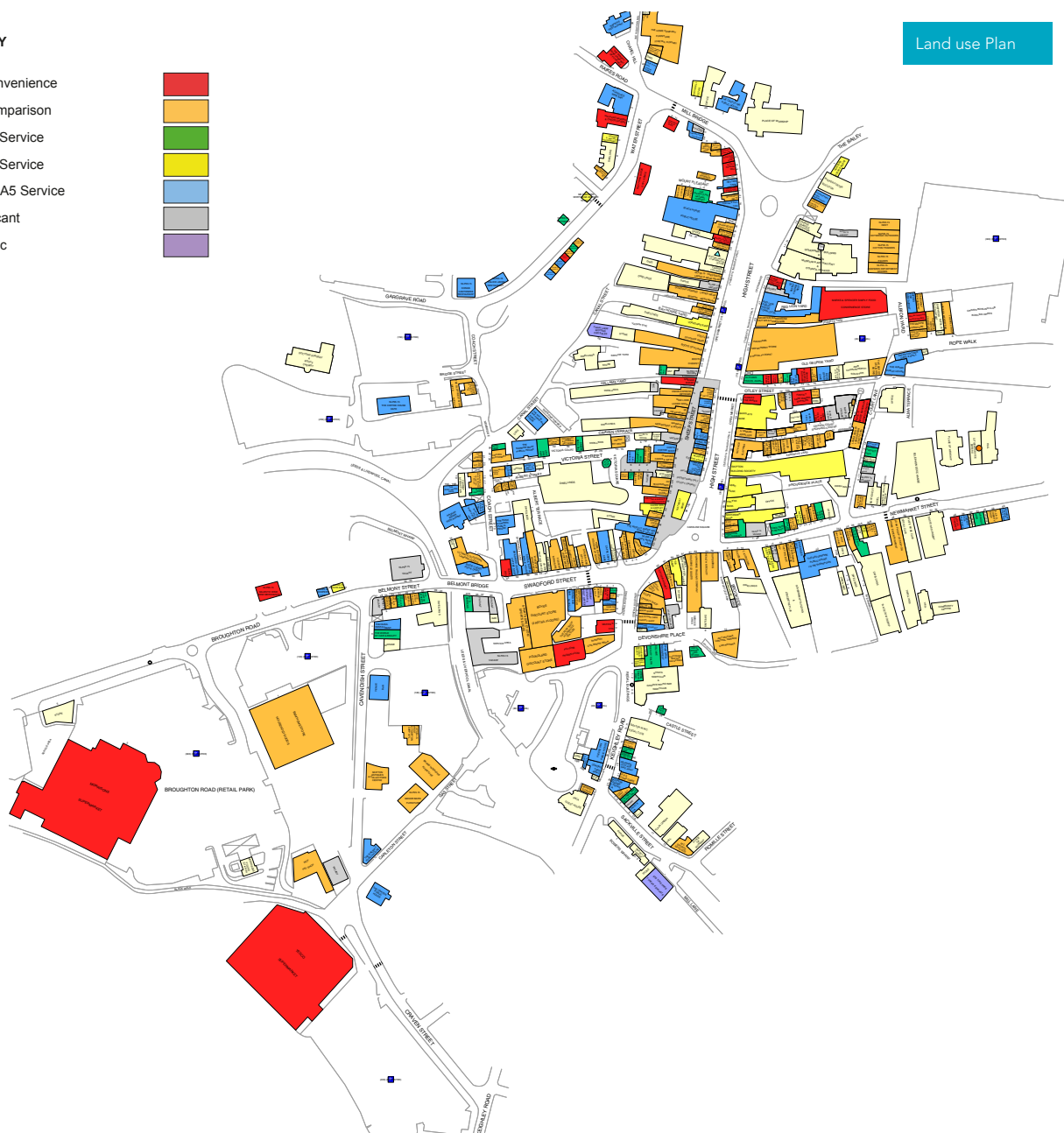
It is therefore considered that the digital health of Skipton is good, and it is well placed to embrace future modes of shopping.

KEY

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



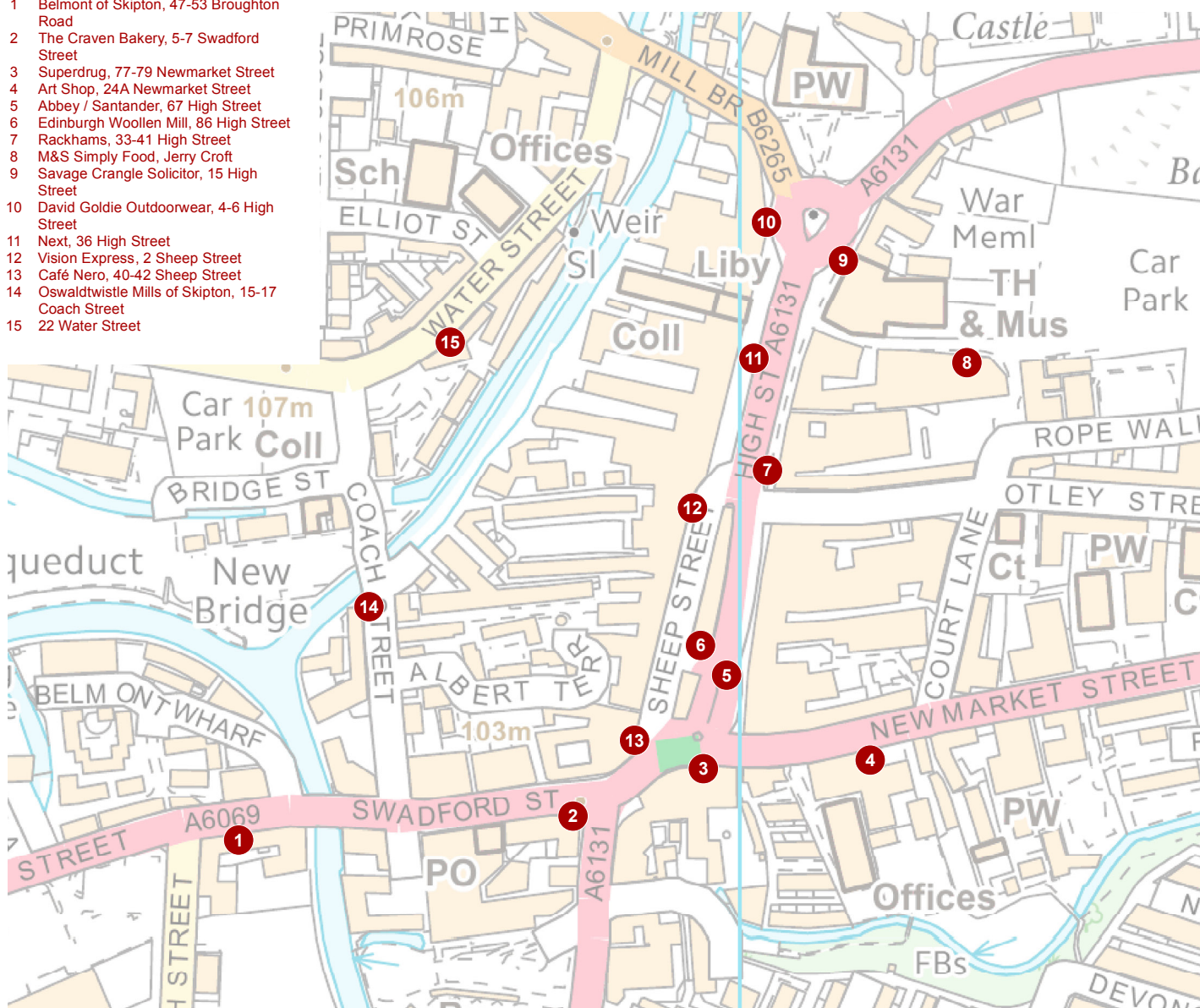
Land use Plan



PEDESTRIAN COUNT LOCATION

Key

- Pedestrian Count Location
- 1 Belmont of Skipton, 47-53 Broughton Road
- 2 The Craven Bakery, 5-7 Swadford Street
- 3 Superdrug, 77-79 Newmarket Street
- 4 Art Shop, 24A Newmarket Street
- 5 Abbey / Santander, 67 High Street
- 6 Edinburgh Woollen Mill, 86 High Street
- 7 Rackhams, 33-41 High Street
- 8 M&S Simply Food, Jerry Croft
- 9 Savage Crangle Solicitor, 15 High Street
- 10 David Goldie Outdoorwear, 4-6 High Street
- 11 Next, 36 High Street
- 12 Vision Express, 2 Sheep Street
- 13 Café Nero, 40-42 Sheep Street
- 14 Oswaldtwistle Mills of Skipton, 15-17 Coach Street
- 15 22 Water Street



FOOTNOTES

- 1 Population estimate for 2013 as at 30th June 2012, Office for National Statistics
- 2 Note – in addition to the above units, an additional 11 units were surveyed which did not fall into any of the above categories. These included betting offices, careers/educational services, car garages and information/advice centres.

- 3 Based on a figure of 10,000 charity shops nationally (<http://www.theguardian.com/voluntary-sector-network/2013/aug/06/charities-could-transform-high-streets>), and 281,930 total shops on the high street (<http://www.retailresearch.org/retail2018.php>) ($10,000 / (281,930 \times 0.81)$).
- 4 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 in the appendices to the main report.



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Planning
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