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# GRASSINGTON TOWN CENTRE HEALTH CHECK

FEBRUARY 2016

## Grassington Town Centre Health Check

This town centre health check provides a snapshot of the current health of Grassington 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; and
- In-street customer surveys.

The primary information collected has been summarised in this document and full raw data sets are included as technical appendices to the 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.

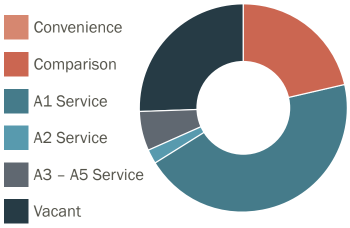
The Grassington Town Centre Health Check relates to the Retail Centre as defined by the Yorkshire Dales Local Plan (2006). NLP undertook its health check site visit on Monday 15 June 2015 between 2:30 and 3:30pm.

Town Centre HEALTH CHECK

# Grassington Town Centre Health Check

## Key Indicators

## 01 DIVERSITY OF USES




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

- High proportion of comparison and convenience goods stores, and A3 – A5 service uses within Grassington compared to national averages
- Under provision of A1 and A2 services compared to the national average
- There are a number other uses within the retail centre, including dwellings, a museum and hotels/guest houses

## 02 PROPORTION OF VACANT STREET LEVEL PROPERTY

**0.00%** Grassington

**11.84%** National Average

## 03 CUSTOMERS' VIEWS AND BEHAVIOUR

- Customer's reasons for visiting Grassington were varied, and included shopping for food only (24%), to have a walk/ stroll around (16%) and tourism (12%)
- The most popular items to shop for were food and groceries (68.% of shoppers intend to buy) and gifts (18% of shoppers intend to buy)
- 28% of people surveyed in the street were planning to spend over three hours in the retail centre

## 04 RETAILER REPRESENTATION AND INTENTIONS TO CHANGE REPRESENTATION

- Vast majority of stores are independents and include a variety of outlets aimed at the tourist market, such as antiques, home wear, clothing and outdoor goods (i.e. walking and camping equipment)
- 11% of respondents to the business survey intend to diversify their current business, the highest proportion of each of the six settlements surveyed in Craven, and 11% also plan to enter into online retailing

## 05 COMMERCIAL RENTS

**[No reliable data available]**

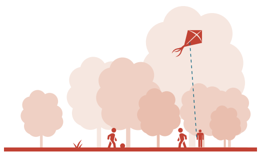
## 07 ACCESSIBILITY

- The majority of participants of the in-street survey travelled to the centre either by car (48%) or walked (44%) (the remainder travelled by bus/coach)
- Narrow and uneven pavements may make accessibility difficult for some users
- 44% of people said that the accessibility of the centre by public transport was poor

## 08 PERCEPTION OF SAFETY AND OCCURRENCE OF CRIME

- No signs of graffiti, vandalism or antisocial behaviour observed
- 100% of customers surveyed said that they felt safe walking around the centre during the day
- Only 54% said that they felt safe walking around during the evening, however 38% replied that they did not know, indicating a potential lack of evening trade

## 09 STATE OF TOWN CENTRE ENVIRONMENTAL QUALITY



- Core retail area is focussed around The Square, which is an attractive public space and retains a high level of local distinctiveness
- Buildings and shop fronts are attractive
- There is a good amount of soft landscaping
- Street furniture is somewhat dated

# GRASSINGTON OVERVIEW

The village of Grassington is located approximately 12km north of Skipton and has a population of approximately 2,040[1]. It is located within the Yorkshire Dales National Park and therefore planning policy falls within the jurisdiction of the Yorkshire Dales National Park Authority.

The village is relatively small however it draws in a large amount of tourist visitors due to its location within the national park. The national park visitor's centre on Hebden Road also adds to Grassington's status as one of the main tourist destinations within the national park.

# DIVERSITY OF USES AND PROPORTION OF VACANT STREET LEVEL PROPERTY

## Diversity of Uses

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

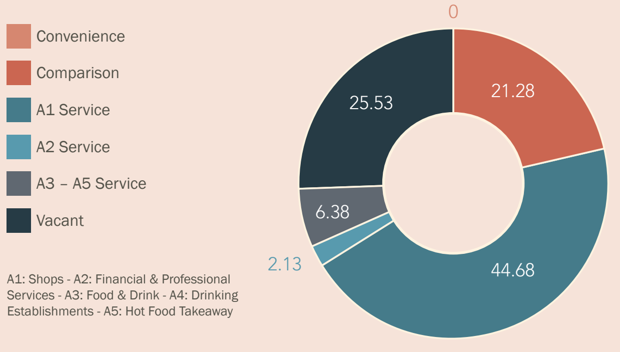



Figure 1: Diversity of uses in Grassington Town Centre

| Use Category | Number of units | Percentage of units in Town Centre | National Average* |
|---|---|---|---|
| Convenience | 10 | 21.28 | 8.40 |
| Comparison | 21 | 44.68 | 35.77 |
| A1 Service | 1 | 2.13 | 12.33 |
| A2 Service | 3 | 6.38 | 10.75 |
| A3 – A5 Service | 12 | 25.53 | 19.38 |
| Vacant | 0 | 0.00 | 11.84 |

Table 1: Diversity of uses in Grassington Town Centre

Source: NLP / Experian GOAD (2015)

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

There are high proportions of comparison and convenience goods stores, and A3 – A5 service uses within Grassington when compared with national averages. This is most likely a result of Grassington's role as a tourist destination, and the retail centre comprises a relatively high number of gift shops (including comparison goods and food gifts such as confectionary and wine/cheeses) which increases the proportion of units in these categories.

There is an under provision of A1 and A2 service uses compared with the national average, and again this is likely to be due to the number of day visitors to the centre which outweighs the demand for such services from the limited local catchment.

In addition to the above uses, there is also a number other uses within the retail centre, including dwellings, a museum and hotels/guest houses.

## Proportion of Vacant Street Level Property

No vacant street level properties were observed during the NLP Health Check. This is evidence of the strength of Grassington as a retail and leisure destination, and the demand for retail/leisure units in this location.

A vacant property was observed on Water Street (the former Mountaineer outdoor goods shop), which lies outside the current Retail Centre.


Figure 2: Vacant Mountaineer unit, Water Street


Figure 3: Grassington library and community hub, The Square

# RETAILER REPRESENTATION AND COMMERCIAL RENTS

## Retailer Representation and Intentions to Change Representation

The Retail Centre of Grassington does not contain any of the 31 'major retailers' identified by Experian GOAD[2]. There is however a Spar convenience food store on Main Street, as well as a Post Office.

The remaining stores are independents and include a variety of outlets aimed at a primarily tourist market, such as antiques, home wear, clothing and outdoor goods (i.e. walking and camping equipment). There is a high proportion of pubs and cafes, which take advantage of the tourist trade.

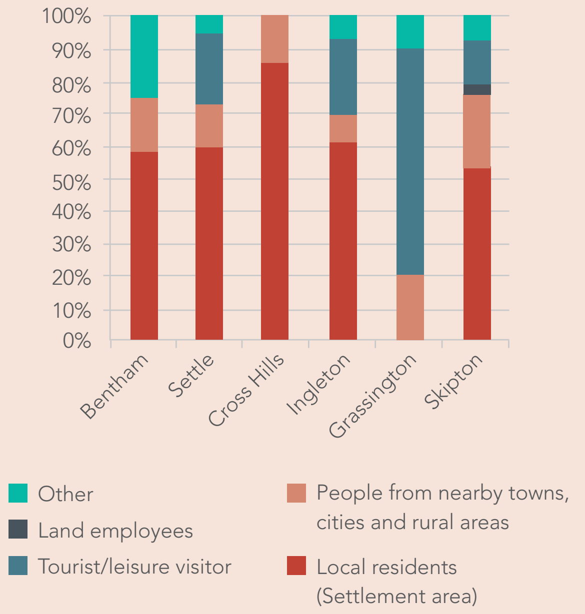



Figure 4 : Customer base on which business operators most rely on

The reliance on the tourist trade in Grassington is clearly illustrated in Figure 4 which shows that 70% of respondents to the business survey in Grassington mostly rely on tourists and leisure visitors. No respondents stated a reliance on local residents, highlighting the potential fragility of the retail sector in the winter months and in periods of bad weather.

As shown in Figure 5, Cross Hills has the lowest proportion of business operators who believe that the centre in which they are located has declined in the last 12 months, and only Settle has a higher proportion of business owners who believe that their centre has improved over the same period. Greater promotion and marketing of the town was clearly the most popular measure for improving the town in NLP's business survey.

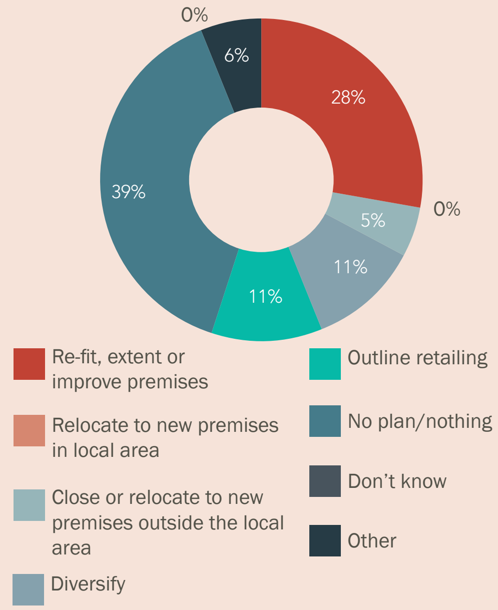



Figure 5: Business operator plans to change business in Grassington

6% of respondents to the business survey stated that they have plans to either close their business or relocate to new premises outside of the local area. 11% intend to diversify their current business, the highest proportion of each of the six settlements surveyed in Craven, and 11% also plan to enter into online retailing.

## Commercial Rents

No reliable data available.


Figure 6: Independent Shops, Garrs Lane

## 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.

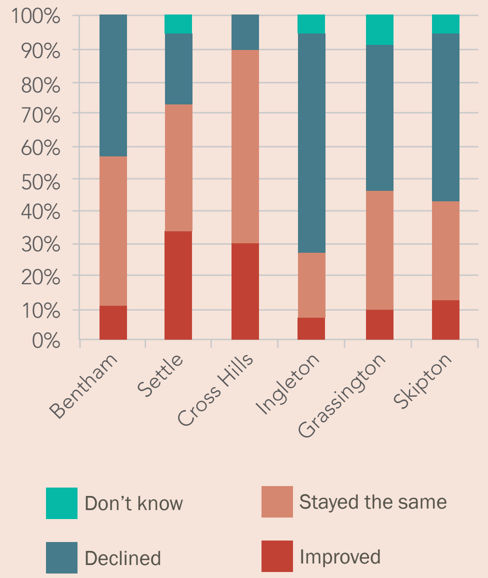



Figure 7: Business operators' opinions of performance of centres over last 12 months

A significant proportion of business operators in Grassington (43%) feel that the centre has declined over the previous 12 months. The reason for this view is difficult to ascertain given the very low vacancy rates in the centre and the apparent buoyancy of the centre as observed during the undertaking of the health checks by NLP. Craven District Council may therefore wish to consider further investigation into this issue.

The top three suggestions to improve Grassington (as stated in the business survey) are more flexible parking; improved public transport and greater promotion/marketing of the town.

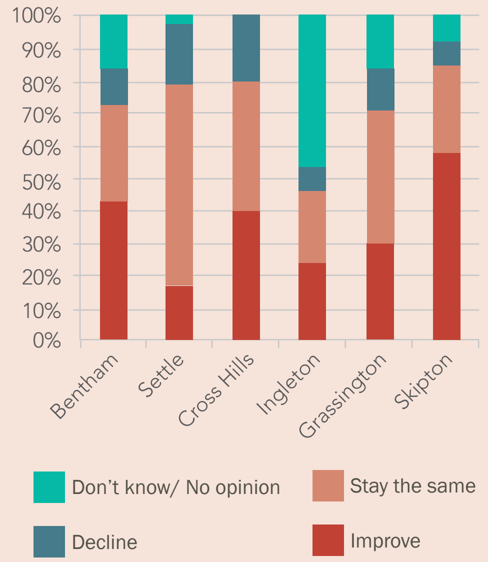



Figure 8: Business operators' expectations for the performance of their business over the next 12 months

The majority of business operators feel that the performance of their business will stay the same over the next 12 months.

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

1. Skipton

2. Harrogate

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 Grassington is spent in Skipton, Harrogate & Keighley.

# ACCESSIBILITY

The main car park serving Grassington is located at the National Park Visitor Centre and is owned and managed by the Yorkshire Dales National Park Authority. Parking is charged between 06:00am and midnight at £2.50 for two hours, and £4.50 for in excess of two hours. Free on-street parking is available on The Square and at the northern end of Main Street/Water Street.

Figure 9: Cars parked on The Square

Bus stops are located outside the museum on The Square and services run to Skipton on a one or two hourly frequency. A service to Ilkley also operates three times per day. There is no railway station serving Grassington.

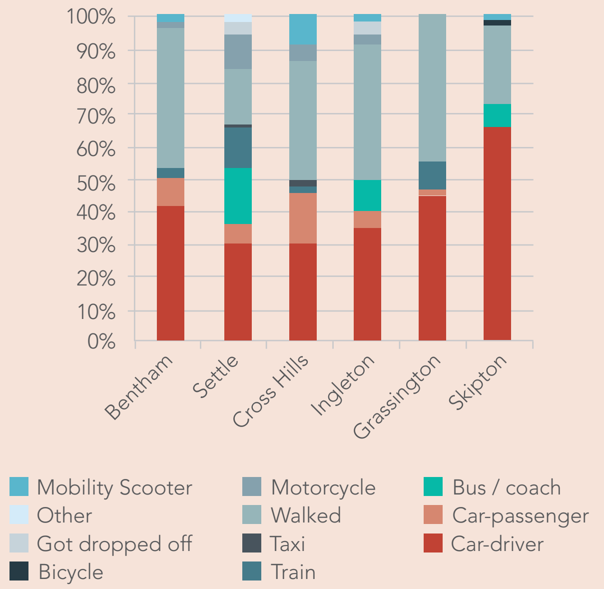



Figure 10: Visitors' mode of transport to centre

The majority of participants of the in-street survey travelled to the centre either by car (48%) or walked (44%) (the remainder travelled by bus/coach). Of those that drove, there was an even split between the proportion of people who parked at the Visitors Centre and on The Square.

The accessibility of Grassington by car was considered to be quite good compared to other centres which customers visit. 34% of participants felt that the availability of parking spaces was poor in comparison to other centres, although on the whole most people felt that parking charges were fair. 44% of people said that the accessibility of the centre by public transport was poor (46% did not know). 20% of customers taking part in the in-street survey identified a desire to see an improvement in the frequency of public transport.

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

## Customers' Views and Behaviour

Customers' reasons for visiting Grassington were varied, according to the results of the in-street survey, and included shopping for food only (24%), to have a walk/stroll around (16%) and tourism (12%). For those who intended to do some shopping whilst they were in the centre, most planned to buy food and groceries (68% of shoppers intend to buy) and gifts (18% of shoppers intend to buy).

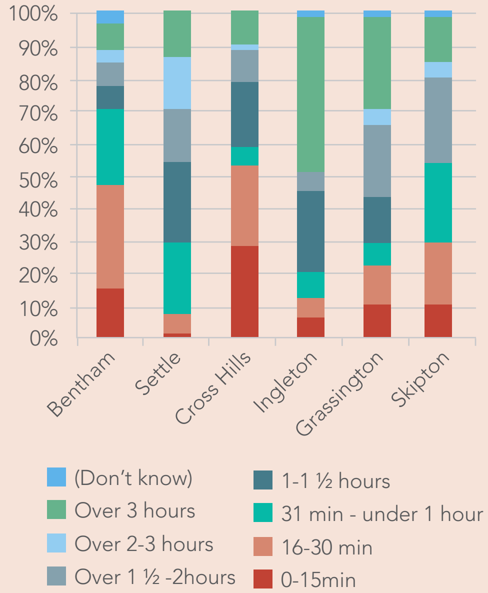



Figure 11: Customers' time spent in shopping area

28% of people surveyed as part of the in-street survey were planning to spend over three hours in the retail centre. This is a high proportion and is an indication of people coming to enjoy Grassington as a place, rather than simply using it as a convenience retail shopping destination. The majority of visitors surveyed planned to visit leisure facilities whilst they were in the centre, and many of these people said that they would visit restaurants and cafes. This helps explain the extended time that people are willing to spend within the retail centre.


Figure 12: Main Street

Customers indicated that they felt that Grassington had a good range and quality of both food and non-food shops compared to other centres they visit.

Over 80% of customers didn't know how the centre compared in terms of town centre events, or the provision of cinemas or theatres, and this is most likely a reflection of the amount of non-locals who participated in the survey and frequency of visit to the centre.

## Perception of Safety and Occurrence of Crime

During the site visit no signs of graffiti, vandalism or anti-social behaviour were observed. The retail centre is considered to have a very welcoming atmosphere and feels very safe.

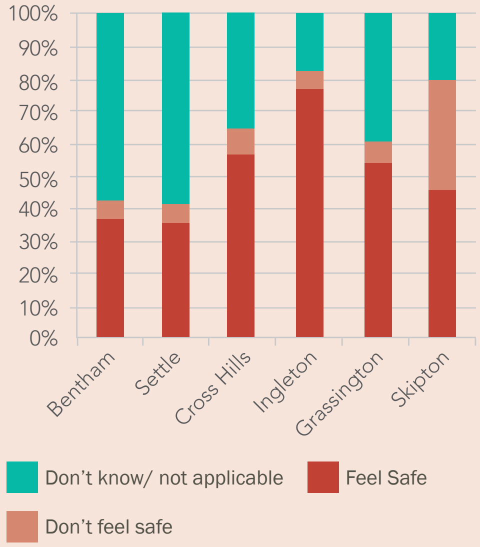



Figure 13: Proportion of visitors who said they feel safe / un-safe in town centre during evening hours

100% of customers surveyed said that they felt safe walking around the centre during the day. Only 54% said that they felt safe walking around during the evening, however 38% replied that they did not know or considered it not relevant to their use of Grassington. There was little appetite for increased policing or CCTV use to improve the feeling of safety.

## State of Town Centre Environmental Quality

The core retail area in Grassington is focussed around The Square, which is considered to be an attractive public space. At the time the health check was being carried out, The Square was in use as the focal point of the Grassington Festival.

A number of the buildings along Main Street and around The Square are listed, and the whole Retail Centre lies within the Grassington Conservation Area. Hard landscaped areas are well maintained and feature cobbled areas in The Square and on some pavements. Pavements are narrow and uneven in some places. Whilst this adds to the historic character of the area, it raises questions of accessibility for some users.


Figure 14: The Square

Shop fronts are evidently maintained to an attractive standard, and are predominantly constructed in wood and stone with well-proportioned glazing. There are also a number of trees, planters and flower boxes throughout the centre and many buildings are covered in ivy, which softens the landscape and adds visual interest.

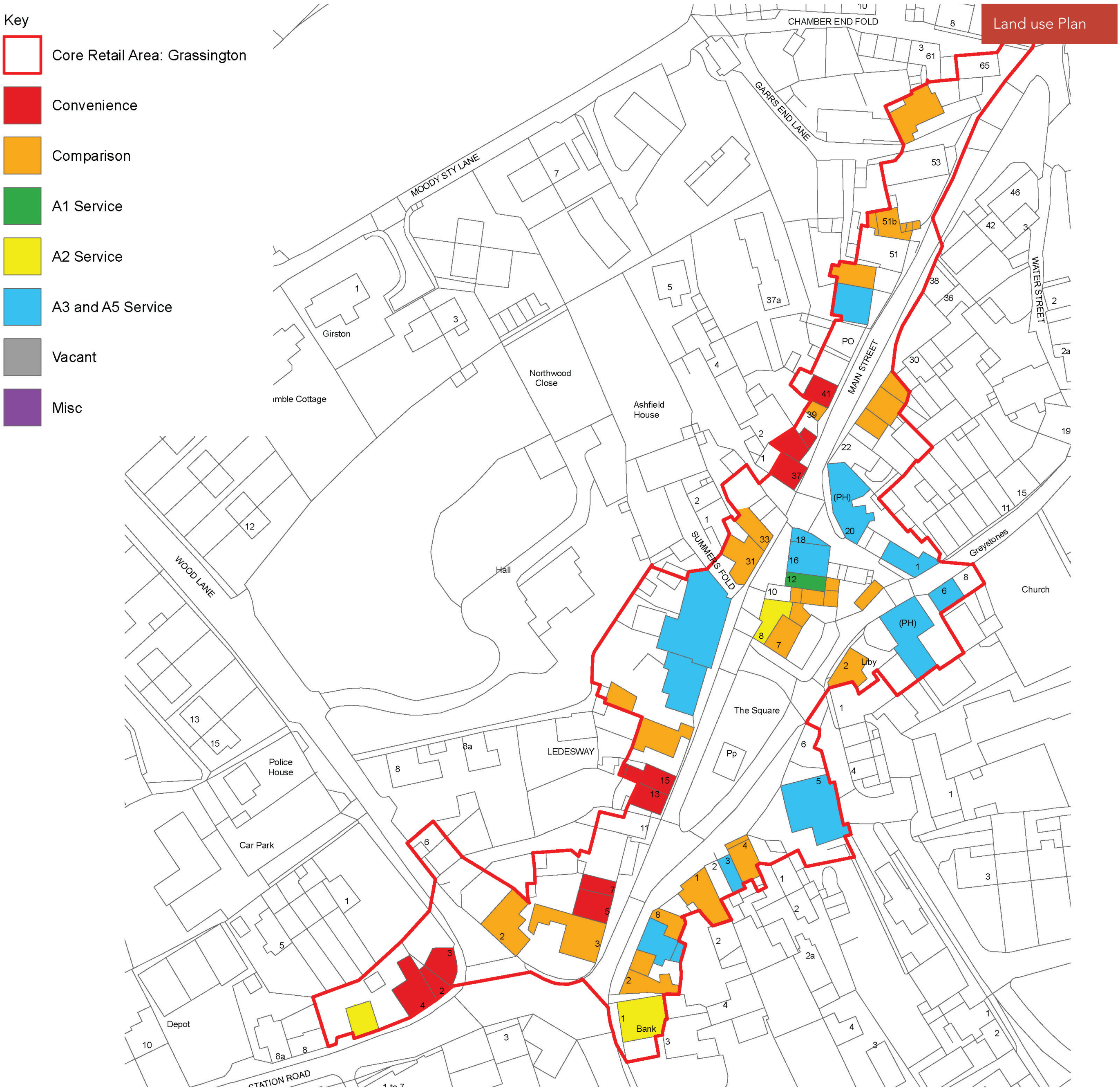
Street furniture is somewhat dated, and consideration may need to be given to how this can be restored or replaced with furniture which contributes to the historic rural character of the centre.

Customer opinions of the environmental quality of Grassington were also high according to the findings of the in-street survey. 98% of people surveyed said that they thought the attractiveness of the built environment was either quite good or very good compared to other retail centres they visit. People also showed an appreciation for the landscaping/ planting in the centre and the shopping environment in general.

# DIGITAL HEALTH

Data provided by Ofcom shows that at the present time, visitors to the centre are unlikely to obtain 4G mobile network coverage. No Cloud Wi-Fi hotspots currently exist in the retail centre.

No stores in the centre are currently offering the CollectPlus service which limits flexibility for those doing their shopping online. There is scope to consider incorporation of click and collect facilities within the library that is part of retail centre, as this could foster a community hub in line with the recommendations of the Grimsey Review[3].



# 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 Retail Study.

3
The Grimsey Review (2013) recommends that local authorities seek opportunities to transform libraries and leisure centres into community hubs, which function as collection points for online shopping.

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