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Craven District Council

Retail Analysis and Health Check - Skipton

Report

Appendices

GLOSSARY

GIS	**-**	**Geographic Information System**
ITZA	**-**	**In Terms of Zone A**
SQ.FT	**-**	**Square Feet**
M^2	**-**	**Metres Squared**
CDC	**-**	**Craven District Council**
DVD	**-**	**Digital Versatile Disc**

1 Introduction

1.1 Donaldsons has been appointed by Craven District Council to undertake a Town Centre Health Check of Skipton.

1.2 The purpose of this report is to inform the preparation of the Local Development Framework (LDF).

1.3 The specific objectives of this report are:

- To gain an objective overall view of the centre and factors affecting its current and potential future performance;
- To enable the consideration of the key indicators of the health of Skipton Town Centre, including those advised in PPG6 (and in the emerging PPS6);
- To consider the appropriateness of the identification of the core retail area and its boundaries;
- To inform any decision on the necessity for any additional designation relating to town centre activities;
- To obtain a basis on which to assess whether the current planning policy approach remains relevant;
- To assist the making of planning decisions and the formulation of future policy for the town centre, and
- To enable the health of Skipton Town Centre to be monitored over time.

1.4 PPG6 advises that, in order to monitor the health of their town centres, local authorities should regularly collect information on key indicators of vitality and viability. This should enable early signs of decline to be identified, a fuller analysis to be made (if necessary) and appropriate action to be taken. The indicators recommended in Figure 1 of the Guidance are considered in detail in section 4 of this report and are:

- Diversity of uses
- Retailer representation and intentions to change representation
- Shopping rents
- Proportion of vacant street level property
- Commercial yields on non-domestic property
- Pedestrian flows
- Accessibility
- Customer views and behaviour
- Perception of safety and occurrence of crime
- State of the town centre environmental quality

1.5 The Government has now published its draft Planning Policy Statement 6: Planning for Town Centres (PPS6) which is intended to replace PPG6 and its later clarifications. The draft PPS, at section 4, states that:

Comprehensive, relevant and up-to-date monitoring is essential to the effective management and planning of town centres.

Whilst some matters, such as need and impact, will need to be assessed in direct response to specific planning applications, the following matters should be kept under regular review by local planning authorities, through Annual Monitoring Reports:

- *The network and hierarchy of centres (at both the regional and local levels);*
- *The need for further development;*
- *The outcome of the strategies for local shopping and services; and*
- *The vitality and viability of centres.*

1.6 The Draft Statement goes on to list the matters on which information should be gathered –which comprise all of the PPG6 indicators, together with the following:

- the quality, quantity and convenience of retailing and other uses in the area and the potential capacity for growth or change of centres;
- population change, economic growth or decline, and expenditure patterns.

1.7 We have considered these matters within this report in addition to the PPG6 indicators.

1.8 The town centre is also benchmarked against two similar towns (Kendal and Northallerton) to enable its performance relative to those centres to be measured now and monitored over time.

1.9 The PPS recommends that the information gathered should be used to inform the review of allocations and policies – a matter we have considered in section 8 of this report.

1.10 Three types of survey have been used to inform the Health Check:

- ➢ Retailer/Business Operator Survey
- ➢ Visitor (in-street) survey
- ➢ Household (Telephone) Survey.

Summaries of these have been included in the main body of this report, whilst full analyses are provided in Appendices 1 to 3.

1.11 In addition, G V A Grimley have carried out a survey of coach visitors to Skipton, the results of which they have kindly shared with us (as we have shared with them the results of our research) and which are summarised within this report.

1.12 The findings of our study will allow the Council to revise its existing planning policies for the purposes of the Local Development Framework (LDF), having regard to current Government guidance, as contained in PPG6, together with the emerging guidance of PPS6.

2 Skipton - Overview

Location

2.1 Skipton is a traditional market town, located at the southern base of the Yorkshire Dales. Nearby towns include Keighley 15km (9.3 miles) to the South East, Harrogate 34.3km (21.3 miles), to the east and Settle 25.7km (16 miles) to the north west. Leeds is the nearest major conurbation, situated some 52km (32.3 miles) south east of Skipton, whilst Bradford is some 30.2km (18.7 miles) to its south east.

Context

2.2 According to the Focus database (derived from the Office of National Statistics information), Skipton had an urban area population of 13,574 at the time of the 1991 Census, whilst that of the Craven District was 49,891. The results of the 2001 Census have been produced to accord with the new wards which came into effect in May 2003. These results reveal a population within the four Skipton wards (which may therefore differ slightly from the 1991 urban area) of 14,313 and that within the District of 53,620, of whom 52,341 live in households.

2.3 Skipton, the largest town within Craven, is the administrative centre of the District, serving an important role as the focal point in local government terms for the people of an area covering some 1,179 square kilometres. Of this area, 808 square kilometres is within the Yorkshire Dales National Park, the land use planning of which is controlled by a separate planning authority (The Yorkshire Dales National Park Authority), The Yorkshire Dales National Park extends over parts of Craven, Richmondshire and South Lakeland Districts.

Communications

2.4 At the time of the Norman Conquest, Skipton commanded the Craven Gap, the best route through the Pennines. It is clear from the plan at Appendix 1 how Skipton has been able to capitalise on this position, as it now sits at the junction of several major roads including the A59 (York, Harrogate, Blackburn, Preston Road), A65 (south east to Leeds and north west to the M6) and the A629 (Keighley and Bradford). It is therefore, understandable why Skipton is regarded as the southern Gateway to the Dales, given the convergence of these principal routes.

2.5 In terms of public transport, there are rail links with regular services into Leeds and Bradford City Centres, making both cities popular commuting destinations. Services south to Manchester are more limited as there is no direct link, although access to Carlisle in the north is good.

2.6 There is also a good local bus service, along with the well known “Dales Bus” which operates in the summer, bringing many walkers and day visitors into Skipton. Details of other bus services are included in section 3 of this report.

2.7 Additionally, the Leeds – Liverpool Canal runs through the Centre of Skipton, forming an important link in terms of leisure use, not only in the form of narrow boat visitors, but also for walkers and cyclists.

Socio Economic Profile

2.8 Lifestyle profiles for the Craven district are set out in detail below. (Data source Focus unless otherwise stated). Once again, there are slight differences between the extent of the urban area adopted for the 1991 Census and that in 2001, following ward changes.

Car Ownership

Year	Ownership	Skipton	District	GB Average
1991	Households with no car	35.3%	25.3%	33.4%
2001	Households with no car	27.9%	18.9%	27.5%

In 1991 there was a higher than average percentage of households in the Skipton urban area with no car, but ownership levels have increased over the 10 year period and are now in line with the national average. Within the Craven District as a whole, however, car ownership has always been above the national average and statistics reveal a constantly improving level of prosperity. Such a high level of car ownership, is also an indication that the quality of public transport provision is below average.

Household Tenure

Year	Tenure	Skipton	Urban Area (4 new wards)	GB Average
1991	Owner Occupied	75.1%	N/A	66.4%
2001	Owner Occupied	76.8%	74.3%	68.3%
1991	Rented (Social Housing)	14.1%	N/A	21.4%
2001	Rented (Social Housing)	9.6%	13.0%	19.9%
1991	Private Rented	6.0%	N/A	7.1%
2001	Private Rented	9.5%	8.4%	8.4%
1991	Other Housing	4.7%	N/A	5.1%
2001	Other Housing	4.1%	3.7%	3.0%

2.9 In the Skipton urban area, levels of owner-occupation of houses have been consistently significantly higher than the national average. Consequently, the level of rented property has been lower than the national average throughout the period, particularly in the council/social housing sector, which has continued to decrease. The level of occupancy of privately rented property has increased over the 10 years and is now slightly higher than the national average. It should be noted that in the above table, unlike the others in this report, the Focus database has adjusted the 2001 Census figures to be directly comparable with those from 1991.

2.10 We have therefore included in the fourth column, levels of household tenure within the four new Skipton wards, revealing a slightly lower level of owner occupation, with a consequent increase in the rented sector, particularly in council/social housing.

1991 Economic Class Groupings

Class Grouping	Skipton	District	GB Average
I (Professional Occupations)	1.9	2.9	4.1
II (Intermediate Occupations)	16.6	23.2	18.9
III a (Non Manual Skilled Occupations)	8.7	6.7	8.3
III b (Manual Skilled Occupations)	17.0	14.6	16.4
IV (Partly Skilled Occupations	8.0	7.2	8.4
V (Unskilled Occupations)	3.4	2.6	2.9
Other	0.9	1.5	1.6
Economically Inactive	42.7	41.1	38.3
Unclassified	0.8	0.2	1.1

2.11 According to the 1991 census data, the Skipton urban area housed a lower than average percentage of workers in the professional sector, and close to the national average in terms of intermediate and other occupations. The statistics for the District reveal a slightly different picture, which is likely to be a result of the more affluent professionals living in the wider area and commuting to other places to work. This is an important point to consider because it is potentially an indication of spending leakage from the local economy to other urban areas.

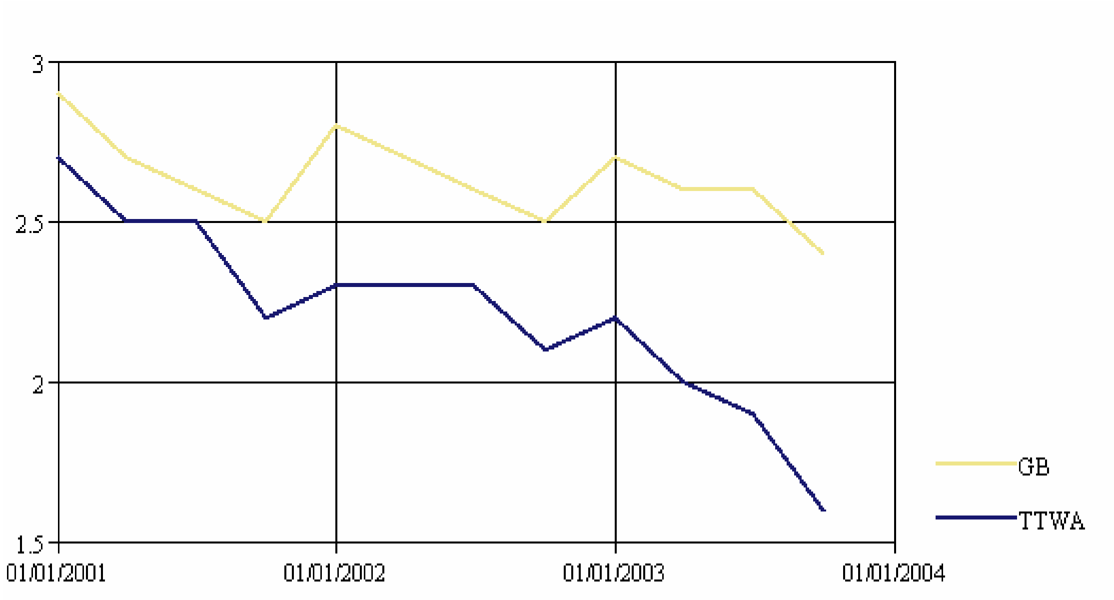
2.12 From 2001 the National Statistics Socio-economy Classification (NS-SEC) is being used for all official statistics and surveys. It replaces Social Class based on occupation and Socio-economic Groups (SEG). This change has been agreed by the National Statistician following a major review of government social classifications commissioned in 1994 by the Office of Population Censuses and Surveys (now the Office for National Statistics) and carried out by the Economic and Social Research Council. NS-SEC is an occupationally based classification but differs considerably from the former economic class groupings. The urban area figures are not yet available.

2001 Class Groupings

Class Groupings	District	GB
AB. Higher and intermediate managerial/administrative/professional	23.5	21.7
C1. Supervisory clerical junior managerial/administrative/professional	30.7	29.4
C2. Skilled manual workers	17.2	15.1
D. Semi-skilled and unskilled manual workers	14.1	17.2
E. On state benefit unemployed lowest grade workers	14.6	16.7

2.13 It may be seen that the district trends generally follow the national average although there are fewer people employed in semi-skilled and unskilled manual work, and more in skilled manual work. The figures for those in unskilled work and on state benefit / unemployed are again below the national average which demonstrates that the area may be considered relatively affluent. The significance of this situation, demonstrated in higher car ownership, lower unemployment, higher levels of owner occupation and a greater concentration of those in better paid jobs, as further indicated in the graph and tables below, is that of greater mobility and access to alternative destinations for shopping and services. Skipton must provide a sufficient range and quality of goods and services to meet the demands of those with a higher spending potential, or they will simply choose to go elsewhere.

Unemployment % travel to work area (TTWA)



2.14 The above graph demonstrates that levels of unemployment fell broadly in line with the national average until early 2003, from which time they have been falling slightly more steeply.

Employment by Sector (4 Skipton wards – 2001 Census)

Industry of Employment (Males 16-74 in Employment)		
	Percentage	**England & Wales**
Agric/Hunting/Forest	2%	2.09%
Fishing	0%	0.04%
Mining & Quarrying	1%	0.40%
Manufacturing	22%	20.22%
Electric Gas & Water	1%	0.97%
Construction	13%	11.24%
Wholesale and Retail Trade; Repair of motor vehicles	17%	16.02%
Hotels & Catering	5%	3.71%
Transport storage and communication	8%	9.32%
Financial intermediation	5%	4.14%
Real Estate; renting and business activities	10%	13.54%
Public administration & defence	4%	5.79%
Education	4%	4.10%
Health & social work	4%	3.90%
Other	3%	4.47%

Industry of Employment (Females 16-74 in Employment)		
	Percentage	**England & Wales**
Agric/Hunting/Forest	1%	0.82%
Fishing	0%	0.01%
Mining & Quarrying	0%	0.07%
Manufacturing	10%	8.75%
Electric Gas & Water	0%	0.44%
Construction	1%	1.5%
Wholesale and Retail Trade; Repair of motor vehicles	20%	17.77%
Hotels & Catering	9%	6.01%
Transport storage and communication	2%	4.27%
Financial intermediation	8%	5.42%
Real Estate; renting and business activities	10%	12.24%
Public administration & defence	3%	5.64%
Education	12%	12.07%
Health & social work	19%	18.98%
Other	5%	6.02%

2.15 The Office of National Statistics has altered the way in which this data is presented, and there are more categories than previously reported. It does, however, provide a split between gender, which is useful. It is clear from this data that manufacturing is a key area of employment for both males and females, and from the previous data set, we can see that this is likely to be biased towards more skilled manual work. Understandably, retail is a significant mode of employment for both men and women, along with hotels and catering. Real Estate is also a notable employment sector. For women, education and health / social work account for 31% of those in active employment.

3 The Surveys

The Retailer/Business Operator Survey

3.1 This survey was distributed to all retailers and most business operators within the town centre. Following the initial distribution, a targeted mailshot was sent out to businesses from whom no response had been received. As a result of this, Donaldsons are now in receipt of 136 completed questionnaires. This represents a response rate of 42% which is very good for a survey of this nature and demonstrates a keenness by the business community to be involved in the consultation process.

3.2 Responses have come from comparison and convenience retailers, commercial businesses, pubs, cafés, restaurants and a wide variety of other service operators. This number and range of responses enables a robust analysis of the survey to be undertaken, although not every question was answered by all.

3.3 A copy of the questionnaire and a summary of the survey responses is included in Appendix 2, while the key findings of the survey are set out below.

3.4 62% of respondents are independent businesses, 36% are national or regional multiples and the remaining 2% are franchisees. 71% of respondents have been in occupation for over five years and nearly a third of these have been trading for over twenty years. Some 17% run relatively new businesses in Skipton, having been in the town for less than two years. In the independent sector, 65% have been trading in the town for over five years and 20% for less than two years.

3.5 Skipton clearly has a very important independent retail sector. It is vital to retain this offer because it provides Skipton with its local distinctiveness in commercial terms. This is not to underestimate the importance of a strong representation by multiple retailers who attract a large proportion of the shopping population. The two sectors, whilst broadly in competition, also complement each other and help to offer a breadth of choice of goods and services and value not available from either sector alone. It is the right balance of multiple and independent retailers and service and leisure operators which is essential to sustain the health of the Town Centre and distinguishes it from its competitors.

3.6 On average, respondent businesses employ almost 7 full time staff and 6 part time staff although the greatest number employed in a single business is 210 full time and 115 part time. Just over 46% of the jobs in these businesses are held on a part time basis, which is a valuable source of employment for those unable or unwilling to work full time.

3.7 A number of respondents indicate intentions to change their business or the location of their business. Four anticipate closure of their current premises and another indicates a desire to retire. One respondent reports a plan to contract the business within the current premises. Twenty two respondents state an intention to expand within their current premises, while another may be opening a second unit within the town centre. A number of respondents (17) are considering relocating to alternative premises within Skipton, whilst a further nine may choose to relocate outside Skipton. Twenty three have indicated no plans to change their current operations and one response was a don't know.

3.8 Around 45% of businesses indicate that they open regularly on Sundays. Of the 53% who do not (a few respondents either did not answer this question or open only occasionally), 8% say they may consider doing so. There are a number of reasons given for not opening on Sundays, including:

- Insufficient business to warrant opening;
- Already working 6 days – need a day off;
- Do not agree with/believe in Sunday opening; and
- Could not get sufficient staff cover.

3.9 Over the last two years, of those who were trading at the time and who responded to the question:

- 60% indicate an improvement in trade;
- 25% indicate no change in their trading levels; and
- 15% report a decline in trade.

Over the last year:

- 60% indicate an improvement in trade;
- 35% indicate no change in their trading levels; and
- 60% report a decline in trade.

3.10 Reasons given for improvement include:

- Improvements made to business practice, staffing, customer service;
- Growing reputation;
- Better product range; and
- Recovery from Foot and Mouth.

Reasons given for decline (but only by two or three in each case) include:

- Lack of customers;
- Lack of parking; and
- Foot and Mouth.

3.11 Expectations of performance over the next two years are generally optimistic:

- 63% expect an improvement in trade;
- 23% expect no change; and
- 3% expect a decline.

3.12 The most frequently quoted reason for expectation of an uplift is improvements in business practices, staffing etc. Other reasons include:

- General growth in business, more customers;
- Growing reputation;
- Better products; and
- Refurbishment/improvements to premises.

Only two respondents give reasons for an expected decline in business – both, broadly speaking, on the grounds of competition, from within Skipton in one case and elsewhere in the other.

3.13 Respondents were asked to consider sixteen aspects of the town centre, rating them as excellent, very good, good, satisfactory, poor or very poor. The majority of these aspects score relatively well. Those regarded most highly (more than 50% good, very good and excellent) are:

- Choice of places to eat and drink — 62% good or better, 28% satisfactory
- Attractive environment — 62% good or better, 26% satisfactory
- Skipton Market — 62% good or better, 25% satisfactory
- Quality of shops — 54% good or better, 32% satisfactory

Aspects most poorly regarded by respondents (more than 50% poor or very poor) are:

- Cost of parking — 69% poor or worse
- Amount of parking — 60% poor or worse

The only other aspect that scores relatively poorly is the toilet and baby changing facilities, rated as poor or worse by 43%, with a further 28% professing not to know.

3.14 When asked to identify the strengths of the town centre, many aspects are mentioned and there is clearly a great deal of pride in the town amongst the business community. The feature topping the list of strengths is the market, followed by the attractiveness/environment/setting. Also featuring strongly is the location/Dales Gateway, the mix of shops/range of independent shops, the historic nature of Skipton, the Castle, the canal, the traditional market town atmosphere, the compactness – making Skipton easy to walk around - and the town's accessibility.

3.15 85% of respondents believe the town has some weaknesses, and some list several (although just one finds no weakness at all). The most frequently mentioned feature (by 39% of those who responded to this question) is lack of parking (or lack of parking for local people), while 10% also cite the cost of parking. Also featuring high on the list is the number of charity shops, regarded as a weakness by 24%, heavy traffic/congestion and – despite the fact that they appear high on the list of strengths - the poor quality/management of the market and a poor mix of shops (e.g. insufficient 'quality' shops, lack of choice, too many discount shops, lack of big names etc). A handful of respondents feel that the maintenance/cleansing of the town centre leaves much to be desired, while others mention frequent road works, high rents and rates and the parking of vans by market stall holders. Also mentioned by a handful is the obstruction of their windows/entrances by market stalls.

3.16 Respondents were asked what improvements they would like to see in the town centre. The most frequently cited improvement is parking – many businesses want to see more and/or cheaper. There are various ideas put forward in this respect such as the building of a multi-storey behind the town hall to decking the Cavendish Street car park. Also linked to this is the theme of better signage around Skipton to include items such as plans of the town centre in the car parks as well as in the bus station and railway station to enable visitors to navigate their way round more easily. Other sought-after improvements are a reduction in the number of charity shops, an improved cleansing regime, support for independent small businesses and a better, more upmarket retail offer. In conjunction with this, a number of retailers mention a desire to see Marks and Spencer brought into the town centre. Some retailers would like to see the market relocated but give no indication of an alternative site. The last main issue centres around the desire to see pedestrianisation of the main shopping streets although before this could happen a number of respondents realise that improvements need to be made to the traffic system around the town centre.

3.17 A number of respondents make additional comments, many on similar themes to those expressed above. These are summarised in Appendix 2.

The Visitor (In-Street) Survey

3.18 NEMS, an accredited Market Research Agency, was commissioned to undertake an independent survey among visitors to Skipton. Face-to-face interviews were conducted with 200 visitors between 10.00a.m. and 5.00p.m. on six consecutive days during early February 2004. Being in the street, the duration of interview was limited to approximately 7 minutes. A full analysis of the survey is included at Appendix 2, while key points are detailed below.

3.19 Most of the interviewees were female (75%) and interviews were achieved over a wide age range – from 16 to over 65 and across the social spectrum. Half of the visitors had come by car (80% of interviewees lived in households with the use of at least one car), while 37% had walked and 10.5% had used public transport (with a further 1.5% arriving by taxi).

3.20 Over 60% of interviewees came from Skipton and the surrounding areas, while others had travelled from the bordering areas of Lancashire and Keighley, from Bradford, Leeds, Ilkley and a few from as far away as Norfolk, Sussex and Essex.

3.21 Over a third of the interviewees (37.5%) were visiting Skipton for the primary purpose of carrying out non-food shopping, while more than a fifth (23%) were in town for the primary purpose of food shopping (and 25% of those were carrying out their main food shopping). Other primary purposes of visit included work (13.5%) and the use of services within the town (banks, building societies, hairdresser, doctor, library etc.). Just 1.5% of interviewees had the primary purpose of visiting the street market. Probably because of the time of year, none of the interviewees were in Skipton to visit the tourist attractions – we believe this would have been different had the survey been conducted a couple of months later.

3.22 Nearly two thirds of the interviewees (62.5%) had a secondary purpose of visit – for example, some main food shoppers were also intending to buy non-food items, some were going to buy food in other shops, others were going to use service facilities. As half of these people were shopping at the edge-of-centre Morrisons and nearly a third at the rather more remote Tesco store, this suggests a high incidence of linked trips.

3.23 Many of those with the primary purpose of non-food shopping were also intending to buy food, use services or eat and drink in the town centre.

3.24 Those whose primary or secondary purpose was food shopping were asked where they normally carry out their main food shop. 90% of them do so in Skipton – 56.1% at Morrisons, 19.7% at Tesco and 10.6% at the Co-op. Other foodstores each used by a handful of interviewees include Asda at Colne, Morrisons and Sainsburys in Keighley and Booths in Settle and Ilkley. .

3.25 Skipton is regarded as the major centre for clothing and footwear shopping by 40.5% of interviewees. The most popular shopping destinations other than Skipton are Leeds (37.8%) and Keighley (19.3%). 10% choose Harrogate, while a handful patronise Manchester, Burnley, Bradford, York, Nelson and Colne, Blackburn or Ilkley.

3.26 The main reason for choosing Skipton for shopping is that it is close to home (56.5%) or close to work (11%). Other reasons, cited by fewer interviewees, include:

- the choice of shops;
- the attractiveness of the environment;
- the range of services;
- the street market;
- its peacefulness; and
- the fact that it is not too crowded.

3.27 Over half of those interviewed intended to spend no longer than an hour in Skipton and under a quarter thought they would be there for 1½ or 2 hours. Whilst this sort of response indicates a relatively short ‘dwell time’, it is not surprising given the size of Skipton town centre.

3.28 48% of interviewees visit the town centre in the evenings, mostly to visit the pubs and restaurants. 27.5% would like to see additional leisure facilities in the town, the most popular being better/more restaurants, mentioned by just 6.5%. Others, each mentioned by just a few, include more night clubs, ten pin bowling, better theatre, more for children to do and more sports facilities.

3.29 Interviewees particularly like about Skipton town centre – the aspect first mentioned:

- its proximity to home (30%);
- the street market (10%);
- its attractive environment (8.5%);
- its character/traditional feel (8%);
- its compact size (7%); and
- its choice of shops (5.5%).

3.30 Other aspects mentioned as particular likes by fewer than 5% include the unspoilt nature, the ease of access on foot, the people, the familiarity and the 'comfortable' nature of the town. Over half of the interviewees like more than one particular aspect of the town centre, the top 'second mention' being the attractive environment.

3.31 Interviewees particularly dislike:

- nothing (18.5%);
- traffic congestion (12.5%);
- lack of parking (10%);
- too many of charity shops (9%);
- too many tourists (7.5%); and
- dirty streets and litter (5%).

3.32 Other aspects mentioned as particular dislikes by fewer than 5% include the market, the poor choice of shops, the fact that it is too busy, lack of disabled access, lack of pedestrianisation and cost of parking. Just over a third of the interviewees dislike more than one particular aspect of the town centre, the top 'second mention' being lack of parking.

3.33 These responses are particularly encouraging in that so many dislike nothing about the town centre – and 2% say they like everything. In several other towns, we have found around half of visitors liking nothing and disliking everything about the centre.

3.34 Visitors would like to see the following improvements to the town centre:

- additional multiple traders (33%);
- fewer charity and £1 shops (17%);
- a wider choice of non-food shops (11%);
- additional small specialist traders (6.5%);
- cheaper/better parking (4%); and
- a wider choice of food shops (3%).

Other improvements, each suggested by only a few, include easier access for families, more shops/cafés open in the early evening, better disabled access, fewer tourists, less traffic, improved paving and pedestrianisation.

3.35 Visitors were asked to rate the importance of a number of amenities in creating an attractive town centre, by stating if they consider them very important, important or unimportant. Unsurprisingly, every aspect is considered either very important or important by the majority of visitors. However, that awarded a very important rating by most interviewees is maintenance and cleanliness (70%), followed by safety (62%), ease of finding a car space (60%), a pleasant town centre environment (54.5%), ease of getting around (52%) and good/easy pedestrian access (also 52%).

3.36 Aspects considered relatively unimportant are value/discount shops (44%), high quality/exclusive shops (38.5%) and shops related to tourist activity (37.5%).

The Household Survey

3.37 NEMS was also commissioned to undertake an independent survey among residents living within the Craven District which we believe, broadly speaking, includes the primary catchment area of Skipton. Whilst this may not be true as far as the extreme north west of the District is concerned, this area has been included to inform both this study and the health checks we are undertaking of some of the smaller retail centres. It is probable that some of those living just over the Craven boundary, in the north west of the Bradford administrative area will shop in Skipton and use its services, but we did not feel that it was appropriate to extend the survey area in that direction. 800 interviews were conducted during the first two weeks of February 2004 with the person responsible for the majority of shopping in each household, of whom the majority (575) were female. As with the visitors' survey, interviews were achieved over a wide age range – from 18 to over 65 and across the social spectrum. The survey area was divided into nine zones, each comprising one or more wards, as follows:-

Zone 1 – Cowling, Glusburn, Sutton-in-Craven
Zone 2 – Aire Valley with Lothersdale, West Craven
Zone 3 – Skipton South, Skipton West
Zone 4 – Embsay with Eastby, Skipton East, Skipton North
Zone 5 – Barden Fell, Grassington, Upper Wharfedale
Zone 6 – Gargrave and Malhamdale, Hellifield and Long Preston
Zone 7 – Penyghent, Settle and Ribblebanks
Zone 8 – Ingleton and Clapham
Zone 9 - Bentham

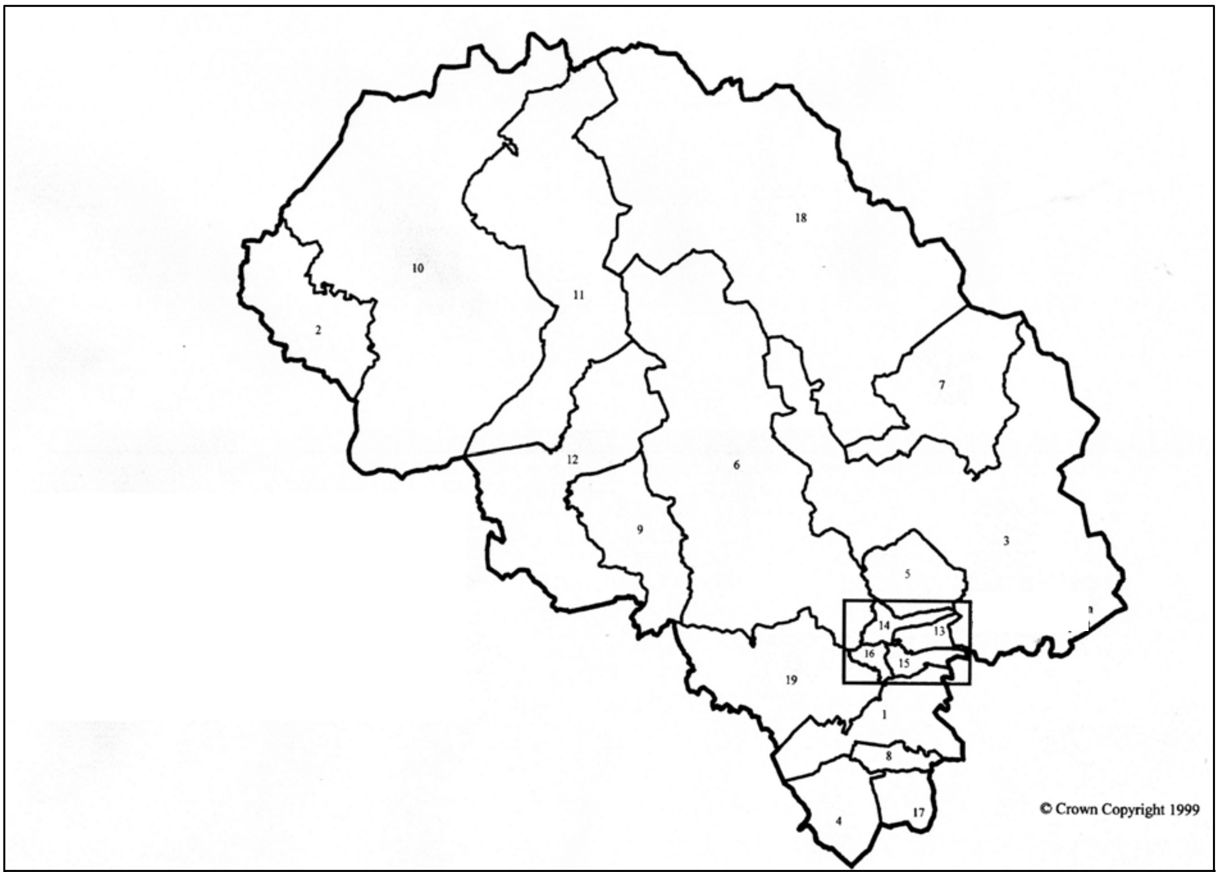
This level of disaggregration of the data is important given that retail centres rarely draw trade evenly from their hinterland.

3.38 The objective of the survey is to assess consumer shopping habits in the District and to evaluate usage and perceptions of Skipton, Settle, Cross Hills, Bentham and Ingleton. We have used the information gained from the survey to calculate the share retained by each centre of the expenditure generated by residents within its catchment area. NEMS have ensured that the interview sample is representative of the District in terms of the age and socio-economic groups of interviewees in order to ensure confidence in the use of the results to assess the District's expenditure patterns. We are therefore able to use the survey sample as a proxy for the entire District.

3.39 Although there are limitations to survey research, particularly in relation to the samples that can be achieved in larger catchments, survey results provide important broad indicators as to consumer preferences in relation to where residents and others usually present in a catchment area live and shop. This enables detailed analysis of a particular area, which assists in understanding the actual draw of larger centres and how they impact upon the market share of smaller centres.

3.40 The map below details the survey zones

HOUSEHOLD SURVEY AREA



Household Survey – By Zone.(Population information from 2001 Census – those in households)

Zone 1 Wards 4,8 & 17 (Population 9257)	Zone 5 Wards 3, 7 & 18 (Population 5037)
Zone 2 Wards 1 & 19 (Population 5152)	Zone 6 Wards 6 & 9 (Population 4643)
Zone 3 Wards 15 & 16 (Population 7469)	Zone 7 Wards 11 & 12 (Population 5118)
Zone 4 Wards 5,13 & 14 (Population 8519)	Zone 8 Ward 10 (Population 3656)
	Zone 9 Ward 2 (Population 3490)

3.41 The results of the survey specifically pertaining to the smaller centres are analysed in detail in our other reports, whilst an overall analysis of the responses is set out at Appendix 3, and key points relating to Skipton are included below.

3.42 Apart from shopping, which is considered separately below, residents throughout the survey area use Skipton for a variety of purposes, the most frequently cited being to visit banks, building societies or the post office (46%) or just to browse (21%) or meet friends (16%). As may be expected, those in the zones nearest to Skipton tend to use the town the most, whilst it is significantly less popular with those living in the north of the District.

3.43 The use of the town centre across the zones for other relatively popular activities is set out in the table below:

Skipton Town Centre	**Zone 1**	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
Eating out	10.6%	13.7%	21.8%	13.8%	8.3%	11.1%	4.8%	3.8%	0.0%
Pubs	8.9%	9.6%	22.8%	20.0%	8.3%	0.0%	1.6%	0.0%	0.0%
Work	4.1%	12.3%	11.9%	17.9%	2.8%	1.6%	0.0%	0.0%	0.0%

3.44 Other activities for which the town centre is used include:

- Active leisure pursuits (gym, sports, base for outdoor activities);
- Library;
- Cinema;
- Medical and other services (e.g. hairdresser); and
- Educational purposes.

3.45 The aspects of Skipton town centre particularly liked by those who ever visit it (many mentioning more than one aspect) are:

- its attractive/pleasant environment/architecture/heritage (46%);
- its closeness to home (33%);
- a good choice of shops (28%);
- 'nothing' (17%);
- Skipton Market (15%);
- good quality of shops (15%);
- shops close together (7%);
- 'everything' (6%); and
- presence/convenience of banks/building societies etc.

18 other aspects are mentioned, but by fewer than 5% in each case.

3.46 The aspects of Skipton town centre particularly disliked by those who ever visit it many mentioning more than one aspect) are:

- 'nothing' (44%)
- traffic congestion (23%);
- lack of parking (19%);
- too busy/crowded/too many tourists (14%);
- dirty streets/litter (11%);
- cost of parking (9%);
- poor choice of shops (8%);
- poor quality/charity shops (7%); and
- lack of personal safety/hooligans (5%).

15 other aspects are mentioned, but by fewer than 5% in each case.

3.47 70% of respondents enjoy leisure activities outside the home, the most popular of which is active participation in sport (including swimming, bowling and cycling) followed by walking, and then by eating/drinking/clubbing. A host of other pastimes are enjoyed as the main leisure activity (only one being sought), each by a small percentage of residents, including gardening, watching sport, the cinema, photography, singing, line dancing and even harp playing. Skipton is the most popular venue for these activities in zones 1 to 6, while Settle is favoured in zone 7, Ingleton in zone 8 and Bentham in zone 9.

3.48 46% of residents spend less than £20 per month on their main leisure activity, which is not surprising, given the predominance of playing sport and walking. 15% spend between £20 and £50 per month and 12% say they spend more. Nearly a quarter of residents simply do not know how much they spend – from experience elsewhere, this response is most often from those whose main activity involves eating out/drinking/clubbing.

3.49 Whilst Bentham residents rarely visit Skipton and those in Ingleton and Clapham may be regarded largely as occasional visitors, those in zone 1 to 6 come at least once a week and many far more frequently. Over 20% of those in Settle also visit Skipton for shopping at least once each week. Throughout the survey area, nearly 70% of residents visit Skipton for shopping purposes at least once per fortnight (and 63% visit at least once per week). Monthly visits are reported by.8% of respondents, with a further 8% claiming to use the town less frequently and 15% never shopping in Skipton at all.

3.50 The majority of those shopping in Skipton (69%) normally arrive by private car, while 23% tend to walk into the town centre (62% of those from the town zones). 6% use public transport and another 1.5% use taxis.

3.51 Over 63% of residents who visit Skipton for shopping purposes shop at Skipton Market, many regularly and in relatively high numbers, even from some of the zones more distant from the town centre.

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Do shop at Skipton Market (% of those who visit for shopping)	60.2%	74%	78.2%	66.9%	63.9%	49.2%	42.9%	53.8%	60.0%
% of the above who shop at the Market at least once per month	58.2%	75.9%	68.4%	69.1%	60.8%	71.0%	48.1%	49.9%	66.7%

Comparison Shopping

3.52 60% of respondents throughout the survey area regard Skipton as their main comparison goods shopping centre, which suggests that the town retains a relatively high proportion of the available expenditure within the District overall. When considered on zone by zone basis, the percentages of those regarding Skipton as their main shopping centre are remarkably high in some wards, as is demonstrated in the table below.

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Skipton as Main comparison goods shopping centre	44.3%	81.8%	90.3%	81.8%	82.1%	79.4%	26.6%	10.9%	0.0%
Other centre of importance (main centre of more than 10% in zone)	Keighley 42.7%	Keighley 13.0%					Settle 41.8% Kendal 12.7%	Kendal 34.4% Lancaster 31.3%	Lancaste r 67.3% Kendal 13.5%

3.53 The fact that a centre is regarded as the principal shopping destination by a certain percentage of residents does not necessarily mean that it retains that percentage of all comparison goods expenditure generated within the area. Most consumers will select different centres for different types of shopping and it is therefore useful to consider where residents are likely to purchase a range of comparison goods.

3.54 In the UK, we spend more per person per annum (average) on clothing, footwear and fashion items than on any other comparison class of goods. Whilst information from the geographic information systems (GIS) company CACI (based on expenditure data from the Office of National Statistics) reveals that expenditure on these goods in Craven is 8% lower than the UK average, it still represents the comparison sector where most money is spent.

3.55 33% of all respondents normally buy clothing, footwear and other fashion goods in Skipton, as do 50% of those in zone 6 and, rather surprisingly, fewer in the zones closer to the town centre – 48% in zone 3, 39% in zone 2 and 36.5% in zone 4. In each of these zones, Skipton is patronised for fashion goods by a greater proportion of residents than choose any other centre. The town's closest rival is Keighley in zones 2 and 3, and Leeds in zones 4, and 6. In zone 7, 21.5% of residents shop in Settle for fashion goods, while a very close 20.3% choose Skipton.

3.56 The table below sets out the percentage of respondents in each zone who normally shop in Skipton town centre for different types of comparison goods.

	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
Clothing/ Footwear & fashion goods	34.4%	39.0%	47.6%	36.5%	39.7%	50.0%	20.3%	6.3%	3.8%
CDs, Videos, DVDs, Cards & Gifts	37.4%	64.9%	62.1%	60.8%	53.8%	54.4%	13.9%	1.6%	1.9%
Books & Stationery	38.9%	70.1%	84.5%	81.1%	62.8%	67.6%	16.5%	4.7%	0.0%
Personal Care Goods	44.3%	80.5%	95.1%	98.0%	78.2%	76.5%	19.0%	6.3%	0.0%
Small Electrical Goods	24.4%	55.8%	58.3%	68.2%	43.6%	48.5%	10.1%	3.1%	0.0%
Bulky Household Goods	14.5%	46.8%	48.5%	52.0%	39.7%	22.1%	3.8%	1.6%	0.0%
Other Non-Food Items	41.2%	71.4%	74.8%	75.0%	64.1%	72.1%	13.9%	6.3%	0.0%

3.57 As may be seen clearly, zone 9 (Bentham) cannot be considered to fall within Skipton's comparison catchment area and zone 8 (Ingleton and Clapham) is of only minor significance in terms of expenditure. However, the results in all the other zones are extremely encouraging, in that Skipton's market share of comparison expenditure on most goods is much higher than might be expected for a town of its size. In all but one sector, Skipton is patronised by a greater proportion of residents in zones 2 to 6 than choose to shop elsewhere. The one exception is in bulky household goods, for which 41.2% of those in zone 6 shop in Keighley (which is not surprising, given the large number of retail warehouses in Keighley). Furthermore, in zone 1, more residents patronise Skipton than anywhere else for books and stationery, personal care goods and 'other non-food items'.

3.58 The survey indicates that Skipton's primary comparison catchment area is in zones 1 to 6, an area containing a population resident in households (as at the 2001 Census) of 40,077. The secondary catchment area includes zone 7 (population 5118) and to some extent areas outside the Craven District (e.g. Silsden and Barnoldswick). Skipton also attracts expenditure, on a more occasional basis, from those living further afield and from tourists, the importance of whom is considered later in this report.

3.59 Information from CACI (sourced from the Office of National Statistics) records that average expenditure in the Craven District on comparison goods is £2,000 per person per annum, after adjustment for special forms of trading. We have adopted the District expenditure data throughout the survey area and therefore the comparison goods expenditure generated in the primary catchment area is currently around £80.15M.

3.60 Based on the survey results, Skipton is currently retaining some £40.45M of that expenditure or achieving a market share in its primary catchment area of 50.5%. In addition, the town is achieving some £1.42M of the expenditure generated in its secondary catchment area (zone 7) and some £415,000 from zones 8 and 9, together with additional expenditure generated from tourism and other shoppers who do not live in the immediate area.

3.61 The comparison expenditure generated within the entire Craven District is some £104.67M, of which 40% is spent in Skipton town centre and a further 11% in the District's other centres. Thus some 49% of comparison expenditure is 'leaking' out of the District, primarily in the clothing and footwear, bulky household goods and small electrical goods sectors.

3.62 It would be unrealistic to assume that all of that expenditure could be clawed back, given the location and retail offer, particularly of Kendal and Lancaster. However, in our opinion, Skipton has the potential to recover some of the leakage from its primary catchment area, particularly that currently going to Keighley and more distant centres. Care should be taken to ensure that additional expenditure in Skipton is not at the expense of Craven's other centres, which should be in a position to continue to cater for the everyday needs of their local communities, as well as benefiting from their specialist retail offers.

Convenience Shopping

3.63 The following table sets out where respondents in each zone normally carry out their main food/grocery shopping. It also details the proportion of linked trips (i.e. visits to Skipton town centre) normally carried out by those who do their main food shopping in Skipton.

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Craven									
Skipton	**64.2%**	**85.7%**	**97.1%**	**96.6%**	**87.1%**	**80.8%**	25.3%	14.1%	0.0%
Settle	1.5%	0.0%	0.0%	0.0%	1.3%	7.4%	**57.0%**	**25.0%**	3.8%
Crosshills	6.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bentham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	15.4%
Ingleton	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	9.4%	0.0%
Other Areas									
Keighley	20.6%	11.7%	1.0%	0.7%	0.0%	3.0%	3.8%	0.0%	0.0%
Kendal	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.8%	23.4%	26.9%
Lancaster	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	**30.7%**
Other	7.0%	2.6%	1.0%	0.7%	9.0%	8.9%	6.3%	20.4%	23.1%
Internet/ Delivered	0.8%	0.0%	1.0%	2.0%	2.6%	0.0%	3.8%	1.6%	0.0%
LINKED TRIPS									
% of Skipton shoppers making linked trips	36.9%	36.4%	18.0%	21.0%	26.5%	43.6%	10.0%	44.4%	N/A

3.64 The pattern of linked trips suggests that, as those in the town zones are able to visit the town centre easily, they are more likely to carry out their main food shopping in isolation, whereas those who travel slightly further are more likely to make it a multi-purpose visit. An obvious exception to this generality is found in zone 7, where relatively few residents appear to be carrying out linked trips in the town.

3.65 Whilst the vast majority of people in the UK carry out their main food shopping close to home (or sometimes close to work) and therefore it is normal for an area to achieve a large market share of the convenience expenditure generated nearby, Skipton retains a remarkably high percentage of that expenditure in the 2 town zones and an extremely healthy market share in zones 1, 2, 5 and 6. This situation reflects the relative lack of large foodstore provision elsewhere in the District and confirms that Skipton's primary and secondary convenience catchment areas closely mirror those for comparison goods.

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9
Skipton as main comparison goods shopping centre	44.3%	81.8%	90.3%	81.8%	82.1%	79.4%	26.6%	10.9%	0.0%
Skipton as main convenience goods shopping centre	64.2%	85.7%	97.1%	96.6%	87.1%	80.8%	25.3%	14.1%	0.0%

3.66 Skipton retains 85% of the main food convenience expenditure generated within its primary catchment area (zones 1 to 6) and nearly 97% of that generated in the two town zones (3 and 4). It is clear that the Morrisons store is trading particularly well, capturing over 54% of the primary catchment area expenditure and 64% of that in the two town zones. Skipton also captures over 25% of the main food expenditure generated in zone 7 and 14% of that generated in zone 8 (but none at all from zone 9).

3.67 Local foodstores/convenience stores clearly play a very important role for top-up shopping. Respondents were asked where they 'normally' carry out such shopping, the results being set out in the table below. Such responses frequently have the effect of underestimating the importance of local specialist shops and of ignoring the fact that most people carry out a certain amount of top up shopping in many varied locations, including whilst on holiday or on day visits. It is normal practice to adjust survey data to take account of such expenditure when carrying out retail studies, but we are considering the performance of the town as a whole, rather than individual stores, we have made no such adjustments in this report.

	Zone 1	**Zone 2**	**Zone 3**	**Zone 4**	**Zone 5**	**Zone 6**	**Zone 7**	**Zone 8**	**Zone 9**
Craven									
Skipton	27.5%	**23.4%**	**66.0%**	**69.6%**	**25.6%**	**58.8%**	3.8%	3.1%	0.0%
Settle	0.0%	0.0%	0.0%	0.7%	0.0%	13.2%	**60.8%**	9.4%	1.9%
Crosshills	**44.3%**	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Bentham	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	**55.8%**
Ingleton	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	**43.8%**	1.9%
Grassington	0.0%	0.0%	0.0%	0.0%	**19.2%**	0.0%	0.0%	0.0%	0.0%
Gargrave	0.0%	0.0%	0.0%	0.0%	0.0%	**7.4%**	0.0%	0.0%	0.0%
"Local shops"	**6.1%**	**2.6%**	**1.0%**	**0.7%**	**0.0%**	**0.0%**	**1.3%**	**3.1%**	**7.7%**
Elsewhere	13.0%	11.7%	1.0%	2.8%	6.5%	3.0%	6.4%	20.4%	7.6%
Don't do top-up	9.2%	57.1%	32.0%	26.4%	48.7%	16.2%	27.8%	20.3%	25.0%

3.68 Information from CACI records that average expenditure in the Craven District on convenience goods is £1,512 per person per annum, after adjustment for special forms of trading. We have adopted the District expenditure data throughout the survey area and therefore the convenience goods expenditure generated in Skipton's primary catchment area is currently around £60.6M.

3.69 Based on the survey results, Skipton is currently retaining some £49.4M of that expenditure or achieving a market share in its primary catchment area of 81.5%. In addition, the town is achieving some £1.62M of the convenience goods expenditure generated in zone 7 and some £643,000 of that generated in zone 8.

3.70 The town is unlikely to be able to claw back much of the leakage of expenditure from its primary catchment area and, even if it does, it may well be at the expense of other centres within the Craven District. Whilst Skipton does lack a modern 'upmarket' foodstore, if such a facility should locate in the town, it would undoubtedly divert trade from existing stores within and on the edge of the centre.

The GVA Grimley coach visitor survey

3.71 Messrs GVA Grimley have, on behalf of Yorkshire Forward, recently carried out a survey of coach visitors to Skipton and have kindly shared the results with us. Of the 600 questionnaires handed out to passengers arriving in the town over a three day period, they received 355 completed responses, suggesting – unsurprisingly - that 77% of coach visitors to Skipton are aged 55 or over and the majority are retired.

3.72 Over half of the respondents visit Skipton once a year and over a quarter come between two and four times each year. Visitors come from a wide range of places, including Northumberland, Lancashire, South and West Yorkshire, Derbyshire and even Dorset.

3.73 72% of the coach visitors spent money in Skipton's shops, which 79% of them regarded as excellent or good, although the majority spent only between £5 and £10.

3.74 Over 80% of coach visitors regarded Skipton's cafés and tea shops as either good or excellent and over half spent money in these outlets, mostly spending less than £10.

3.75 Only 56% of the visitors spent money at the Market – but for many that was because they visited the town on a non-market day. 21% of coach visitors would visit the town more frequently if there were more market days, while 38% would not. Nearly half of the visitors said they would still come to Skipton if the Market were not there at all, while 23% said they would not do so. Just 28% said they would come to the Sunday Farmers Market in Skipton.

3.76 The main attraction of Skipton to the coach visitors was the atmosphere and 'village feel', with many describing it as quaint and pretty. Nearly a quarter particularly like the shops and the Market.

3.77 When asked if there is anything they disliked about Skipton, very few respondents could think of anything at all - just some 17% volunteering some 13 'dislikes', the most prevalent being the traffic/pedestrian conflict, closely followed by charges for toilets and coach/car parking fees.

3.78 The GVA Grimley survey highlights the fact that coach visitors are attracted to Skipton as a traditional Yorkshire market town, rather than for any individual attraction offered. Visitors spend money in the shops, cafés and the market, albeit in relatively small sums. Few seem to visit the traditional attractions (e.g. the castle and museum), although that may be a reflection of the relatively short amount of time in the town allowed by the coach operators.

Key Points from the Surveys

3.79 All the surveys undertaken during the course of this study reinforce the perception of Skipton as a popular and successful town centre, widely appreciated for its environment and atmosphere, with relatively few finding anything to dislike. The town clearly has the potential to improve its visitor experience, particularly in terms of retail choice, and to safeguard further its economic sustainability.

4 The Health Check

4.1 The health check considers the way in which Skipton town centre functions. This is not just dependent upon its retail offer alone, but on Skipton's ability to attract people to use its current services and to attract increasing investment over time, not just to maintain services, but to improve its attraction, increasing the number of visitors in the longer term.

4.2 This is dependent upon the centre's four A's:- Attractions, both retail and non-retail; Accessibility, by all forms of transport; Amenities, including the quality of the centre's environment and perception of safety; and Action, whether the centre has addressed any problems and is taking any positive action to remedy them.

4.3 These four indicators are covered in greater detail further in this report, but it is useful to consider these aspects to set the context of the health check.

Attractions

4.4 Skipton town centre provides a dual role. It acts as the main administrative centre for the district and, as the gateway to the Dales, provides attractions for tourists. For residents of Craven, the town centre provides key main food shopping facilities including Morrisons, Tesco and the Co-Op Food Fair. In terms of other shopping attractions, these are focused on the attractive High Street and Sheep Street, with the historic castle and mediaeval church situated at the top. There are a number of multiple retailers located in Skipton, along with more specialist shopping aimed primarily at the tourist market. Craven Court shopping centre, accessed off the High Street, has proved to be a successful development, and contains an interesting mix of larger brand names and smaller retailers. There is also a small Rackhams department store situated on the High Street and a larger Co-op department store (incorporating the Food Fair) at the junction of Swadford Street and Keighley Road.

4.5 The street market is very well established and operates on Mondays, Wednesdays, Fridays and Saturdays. It is diverse in offer and caters for both tourists and local people, selling a wide range of goods including clothing, hardware, glass and china and local produce. There appears to be a widely held view, with which we concur, that the quality of the market has declined in recent years and we consider the impact of the facility on Skipton in greater detail in section 6 of this report.

4.6 There are several public houses in the town centre and a J D Wetherspoons newly developed on Newmarket Street, which has replaced the former Devonshire Hotel. The night club (Bliss) on Keighley Road appears popular with younger patrons and caters for the evening economy based role of the town centre.

4.7 There are a number of café bars and more traditional cafes, although the number of high quality restaurants is somewhat limited. During our inspections, we noted 16 restaurants within Skipton, eight of which appear on the Goad defined town centre plan. These include three Indian, an Italian, a French and two fish restaurants.

4.8 There are several non-retail attractions, including the Castle which is popular with tourists and for educational trips. The Trans-Pennine Leeds Liverpool Canal is popular with walkers, cyclists and for fishing, in addition to boating. Skipton is very popular with walkers visiting the Dales in general, but there are also a number of town based walks which include the Millennium route which utilises the canal and runs beneath the Castle ramparts into Skipton Woods and back via Chapel Hill. There is also the "gateway" guided walk which starts outside the tourist information office.

4.9 Skipton is in easy reach of the Embsay Steam Railway which is another popular tourist attraction.

4.10 An attraction aimed more at local people is the health and fitness centre and swimming pool at Aireville park built in association with Sport England and detailed under Actions. The out of town Hanover International Hotel caters for conferences and visitors and offers a leisure club for the use of guests and private members.

4.11 Nearby attractions include Malham Cove, the Bolton Abby Estate, Kilnsey Crag and of course the famous Yorkshire Three Peaks of Pen-y-Ghent, Ingleborough and Whernside.

Accessibility

4.12 Skipton is situated just off the A65 and sits at the convergence of several key road links: A65, A59 and A629. Despite its rural setting therefore, Skipton is very well connected by road in all directions. Within the town centre, there is a railway station, with direct links to Leeds and Bradford to the South East and Lancaster and Carlisle to the North West, the latter via the Settle to Carlisle line. Rail links to Manchester are more difficult, with sometimes multiple changes required, making it a long journey. Conversely, there is a direct rail service between Skipton and London. Skipton has a bus interchange providing a wide range of services to local, regional and national destinations.

4.13 Parking within the town is adequate, although at peak times can become congested. On non market days, parking is allowed on the "setts" which facilitates short visits to the centre.

Amenities

4.14 The town centre environmental quality and perceptions of safety are considered in more detail later in this report. In general terms, because Skipton is a historic town, the main High Street is very attractive with wide York paved footways, and wide cobbled "setts" forming a buffer between the main road and pedestrians. The setts also provide for the market stalls, and double as short stay parking on non market days. There is generally a relaxed atmosphere and feeling of safety within the town centre during the day, which is a welcome contrast to many larger centres where a police presence and feeling of tension are all too often apparent.

4.15 The term amenities also includes the cultural and leisure based attractions of the centre and its environmental quality. The former have already been mentioned under "attractions " and are considered more thoroughly in the main health check as is the environmental quality of the town.

Action

4.16 Recent years have seen significant new development in Skipton, one notable example being the imaginative conversion of Victoria Mill into high quality apartments. Formerly home to

Victoria Mill Source Skipton Web

the International Textile Company, the Victoria Mill represents the changing face of how we choose to live. The trend towards this type of accommodation has been greater than most would have expected over the last ten years. Once considered to be a second class form of living, flats/apartments are now very much in vogue, particularly amongst younger people who choose to be close to the centre of town and its amenities , and prefer the concept of modern open plan living.

4.17 Another similar development includes that of Union Mill which was formerly a Cotton weaving mill. Built in 1867 by Skipton Land and Building Company and run by the Skipton Mill Co Ltd. Union Mill now comprises a mix of flat and houses. The old mill building was retained for conversion, with the older "north light" industrial buildings giving way to housing development.

4.18 In April 2003 Yorkshire Forward initiated a Market Town Renaissance project for Skipton. Local people have been involved in the project not least during a visioning event. This event, which included the installation of temporary works of art within the town centre, was held specifically to focus the minds of the community on potential vision options for the future direction of the town. Both Craven District Council and the RMT team have received the outcome of this initial work in the form of a vision and masterplan

4.19 Under the auspices of the Renaissance Project, the District Council last year commissioned the installation of a series of temporary works of art in the High Street to engage local people in ideas of transformation and change. The artworks were designed to aid the visioning process and focus the minds of the community on potential options for the future of the town.

4.20 A Traffic Management Strategy for Skipton was adopted by North Yorkshire County Council late in 2002. The key elements of the adopted strategy are:

- Provision of dropped kerbs and tactile paving.
- Bus Stop Improvements – poles, flags, timetable cases, low floor boarding at key locations.
- Formalise and sign 'Hail and Ride' sections of town bus services.
- Bus Station re-development (see separate sub heading).
- 20 mph zone and associated traffic calming in the centre of Skipton.
- Heavy Goods Vehicle Restrictions in the High Street with exception for loading/unloading.
- Junction Improvements at:-
    - Caroline Square
    - Water Street/Mill Bridge
    - Newmarket Street/Otley Road
    - Keighley Road/Craven Street
- **Pedestrian Measures :-**
    - Upgrade Black Walk including provision of ramps at Gallows Bridge.
    - Pedestrianise Sheep Street and Otley Street
    - Improved pedestrian facilities in High Street
- **Cycling Measures :-**
    - Upgrade towpath to facilitate joint use by pedestrians and cyclists.
    - Provide cycle route between Skipton Hospital and the Railway Station.
- **Parking:-**
    - Introduction of disc parking on the High Street Setts
- **Residents Parking Schemes in:-**
    - Water Street area
    - Craven Street/Church Street area
    - Middletown area
- **Improved signing to car parks.**
- **Localised traffic calming in residential areas and creation of a Home Zone in Middletown.**
- **Improvement of traffic and pedestrian signs throughout the town.**

Bus Station Redevelopment

4.21 The bus station in Skipton is currently dated and considered to be unsafe in particular in the evening. There are plans to redevelop the facility, which will include the provision of 6 bus stands, some car parking, a Taxi stand and mixed use development which is likely to include retail, commercial office and residential uses

Swimming Pool and Fitness Centre

4.22 A new council swimming pool and fitness centre has opened at Aireville Park, Gargrave Road, in association with Sport England. The pool comprises a 25m 6 lane pool catering for all age groups and including a separate training pool suitable for disabled swimming, children and adult lessons.

4.23 There is also a modern fitness centre offering gym, café, sauna and steam room facilities. Additionally, there are outdoor facilities which offer a multi use games area catering for football, tennis, netball and basketball. A 15 hole municipal golf course has also been developed.

Analysis of the PPG6 and PPS6 Indicators of Vitality and Viability

4.24 This section deals with the analysis of the town centre in accordance with indicators of vitality and viability, including those recommended in PPG6 and PPS6 and also considers Skipton with the centres of Kendal and Northallerton. A plan of the town centre is shown at Appendix 1.

The PPG6 Indicators are:

- Diversity of uses
- Retailer representation and intentions to change representation
- Shopping rents
- Proportion of vacant street level property
- Commercial yields on non-domestic property
- Pedestrian Flows
- Accessibility
- Customer Views and Behaviour
- Perception of safety and occurrence of crime
- State of the town centre environmental quality

The draft PPS6 retains all the above indicators and adds:

- The quality, quantity and convenience of retailing and other uses in the area and the potential capacity for growth or change of centres; and
- Population change, economic growth or decline, and expenditure patterns.

Diversity of Uses

4.25 For the purpose of this analysis,we have taken the industry standard Goad definition of town centres and retail floorspace. This is the easiest way in which to benchmark the centre over time and against competing centres. The floorspace figures quoted are totals of gross building footprints rather than actual retail selling space.

4.26 Skipton has a total floorspace provision of 45242.30 m² (487,000 sqft) according to the Experian Goad survey of January 2003. This is distributed over approximately 276 retail units within the Goad defined town centre. The prime retail offer is located along High Street (including Craven Court) and Sheep Street. More secondary are Swadford Street, Newmarket Street and Keighley Road, all of which run off the junction at the bottom of High Street and, in each case, the offer peters out the greater the distance away from the High Street. Otley Street is also a secondary location, providing one of the links to the Rackhams car park and buildings around Court Lane. Other shopping side streets and alleyways, such as Coach Street and Victoria Street tend to be more tertiary locations, but many are interesting and very attractive, and in some instances allow access to the canal side. They are however easy to miss as a first time visitor.

4.27 The breakdown of the retail offer in terms of the number of retail units is set out in the table below:-

Retail Trade Group	**Outlet Numbers**	**Percentage of Total**	**GB Average**
Convenience	28	10.14	9.3
Comparison	163	59.06	48.12
Service	70	25.36	30.61
Vacant	13	4.71	10.48

4.28 The level of comparison retail units is almost 11% greater than the national average, whilst that of service units is some 5% lower. Whilst many service units perform an invaluable role in town centres, adding greatly to diversity, a predominance of such users tends to be a feature of declining vitality, which is clearly not the case in Skipton. It is also notable that the number of vacancies is only 4.71% of the total which is less than half of the national average, a strong indication of the strength of the town centre. We carried out a piece of research in a number of towns in 1999 at which time we noted 22 vacant units in Skipton – still below the national average even at that number.

4.29 Following our survey in January 2004, we noted that the number of vacancies has fallen to 9 which represents 3.28% of the total, and an indication of the strength of demand for retail space in the town. Whilst this position indicates that business within the town is healthy, it is clearly difficult for retailers with requirements to secure representation in a town with little or no turnover of units. In turn, a static market may have the effect of restricting rental growth. The level of vacancies suggests that there may be a need for additional retail floorspace within the town centre.

4.30 In many ways, it is more useful to look at changes in floorspace of the town over time as well as compared with the national average. Experian Goad produces centre reports for all towns (above a certain size) and cities across the United Kingdom. As noted above, the Experian Goad retail floorspace information is based on footprint areas rather than actual retail selling space and gives over inflated estimates of retail floorspace compared with the Local Authority's own information. The information is, however, useful as it allows benchmarking against previous years and also against other competing towns or cities. The table overleaf details the distribution of retail floorspace between the retail types as at January 2003.

Retail Trade Group	Floorspace m²	Percentage of Total	GB Average
Convenience	11,705	25.87	16.70
Comparison	24,154	53.39	52.96
Service	8,268	18.28	20.54
Vacant	929	2.05	7.95

4.31 The floorspace analysis demonstrates that there is a significantly greater proportion of convenience units when compared to the national average. When one looks more closely at this provision, it is clear that this provision is skewed due to the presence in the town centre of the large foodstores - Tesco and Morrisons. Within the main town centre, there are also several bakers and butchers, a number of which clearly benefit from the tourist trade – for example, the famous pork pie shop on Mill Bridge where queues out onto the street are a common sight. There is also an off-licence on the high steet, but no green grocers or fishmongers (although these goods are available from the street market and foodstores).

4.32 The comparison offer (in terms of floorspace) mirrors the national average in percentage terms, but not in the type of retailers present in the town centre, as many cater for the tourist and specialist market. For example, there are a number of outdoor clothing retailers such as Ultimate Outdoors (formerly George Fisher) on Coach Street, and Mountain Warehouse and Tog 24 on Sheep Street. Whilst the proportion of charity shops seems slightly high, the provision in terms of floorspace is in line with the national average. 29 of the 133 respondents (22%) to the retailer/business survey cited the presence of too many charity shops as one of Skipton's weaknesses. This view was echoed in the street survey, although not quite so widely, with 9% of respondents particularly disliking the number of charity shops and 17% saying that they would like to see fewer such outlets. There are in fact only six charity shops within the Goad defined town centre (the Sue Ryder shop on Newmarket Street having recently closed), but most of these are rather close together, giving a perception of proliferation.

4.33 In terms of outlet numbers, Skipton has a greater than average proportion of comparison shops (59% compared to an average of 48%), which is a reflection of the generally small unit size within the town centre.

4.34 The service sector contains a slightly lower than average provision of restaurants and cafés etc, both in terms of unit numbers and floorspace. It should be noted, however, that these figures do not include public houses and there are a number of the pubs within the centre which serve food. Whilst it may be argued that there is a deficiency in the quality of dining provision, many of these establishments appear extremely popular with both local customers and tourists.

4.35 The provision of Building societies (in floorspace, not unit number terms) is above the national average, although this is skewed by the presence of the Skipton Building Society within the centre on High Street, occupying a large office building.

4.36 Banking and Financial services are well provided for with the presence of the usual "high street" banks. There are also numerous cash machines available, the lack of which can often be frustrating in more rural towns.

4.37 There are a number of estate agents and solicitors within the centre, generally local or regional independent practices, including Dacre Son and Hartley, James Pye and Sons and Wilman and Lodge. Solicitors include a number of well established independent practices.

4.38 The market is an essential attraction within the town centre. It is believed to have originated in the 12 century under a charter granted by the Crown to the Lord of the Manor of Skipton. Craven District Council legally acquired the rights under this charter in 1991 and having done so became the market authority with the responsibility for regulating the High Street market.

4.39 Today, the market operates on Mondays, Wednesdays, Fridays and Saturdays. It comprises approximately sixty stalls of varying size and selling a range of goods from specialist cheese stalls to discount hardware. The Market is considered in more detail in section 6 of this report.

4.40 Bars and public houses are not included in the Goad Summary reports, but during our inspections we noted a total of 17 and one night club within the town centre. There is no particular focus of bars and clubs and they are spread relatively evenly throughout the town centre, being generally of a traditional nature. The Wetherspoons pub recently opened will provide an interesting addition to the offer. Wetherspoons are keen on price, and it is likely to be attractive to younger residents.

4.41 Health and Beauty Services within the town centre include 12 hairdressers, an aromatherapy centre, a beauty salon and a solarium. Also located within the town but not necessarily within the centre are 5 dentists, a chiropodist, a couple of physiotherapists and two doctors' surgeries.

4.42 Other uses within the town centre include a library on the High Street which is linked with Craven College and a museum, within the Town Hall buidling. There is no public art gallery, although there are a number of art retailers who brand themselves as galleries.

4.43 The provision of floorspace in Skipton can be compared with other towns for benchmarking purposes. We have selected Northallerton and Kendal as comparable to Skipton as they display many similar features, in terms of their function and rural hinterland. The table below sets out the total district population of each town, together with total floorspace and the breakdown of retail sectors.

Experian Goad Diversity Tables 2003	**Skipton**	**Northallerton**	**Kendal**	**National Average**
District Population (2001 Census)	53,620	84,111	102,301	N/A
Total Floorspace m²	45,242	42,450	58,527	N/A
Convenience %	25.87	25.16	8.89	16.70
Comparison %	53.39	55.14	61.43	52.96
Service %	18.28	14.88	21.59	20.54
Vacant %	2.05	1.75	5.87	7.95

4.44 The district population of Northallerton is 57% higher than that of Skipton, but the total town centre floorspace of the former is only 11% greater. Similarly, the district population of Kendal is 91%

higher than that of Skipton, but the total centre floorspace is only 29% higher. This reflects the importance of Skipton as a retail destination, not just to those living within the district, but to a wider visitor population. However, it should be noted that the Goad defined Skipton town centre includes the Morrisons, Tesco and Focus DIY stores, which arguably could have been treated as occupying edge of centre locations. Conversely, there are a number of large retail units close to, but not included in, the defined town centres of both Northallerton and Kendal (including in the latter case the K Village Outlet Centre).

4.45 Both Northallerton and Skipton have a considerably higher than average proportion of convenience space while that in Kendal is low at 8.89%. However, as noted earlier, both Morrisons and Tesco are included within Skipton's defined town centre, whilst in Kendal, Morrisons and Asda stores are about a mile out of town. Tesco, Safeway and Netto are all within Northallerton's defined town centre, although the combined floorspace of all three is not much greater than that of Morrisons in Skipton.

4.46 All of the centres have an above average level of comparison floorspace, with Skipton deviating from the mean by less than ½%, while Kendal has the highest provision at 61.43%.

4.47 Kendal has a slightly above average proportion of service space, whilst that of Northallerton is some 6% lower.

4.48 Slight differences in distribution of types of floorspace, or deviations from the average, do not necessarily mean that a centre is particularly successful or otherwise. What is important is that a town is able to offer a sufficient range and quality of goods and services to satisfy the needs of its customers. Large changes in provision over time may, however, be significant, particularly where comparison retailers are replaced by fast food takeaways, insurance agents, tanning studios etc to the point where few goods can actually be purchased – which has happened in several, generally smaller, declining centres. It is clear that all three centres currently display indications of a healthy retail sector.

4.49 In terms of vacancy rates, all three centres are below the national average and both Northallerton and Skipton have very low levels at around 2% which, as mentioned earlier, indicates a strong centre, but one where rental growth is in danger of being stifled, unless there is a regular turnover of units.

Retailer Representation and Intentions to Change Representation

4.50 45% of the top 20 comparison goods retailers are located in Skipton (compared with 30% in Northallerton and 50% in Kendal). These, **whilst not necessarily representing the finest selection of retailers in terms of quality**, are considered to be the most successful and are defined by Focus as the top 20 comparison multiples ranked by ORC's forecast of average town centre sales. Those present in the town (together with their rankings) are:
Boots (1), Woolworths (4), W H Smith (7), Next (9), Superdrug (11), Lloyds Pharmacy (12)
Co-Op Department Stores (14), New Look (16), Dorothy Perkins (19).

4.51 It is a mark of the regard in which Skipton is held that many of these retailers are in units which they would normally find operationally unsatisfactory, being small or inconveniently configured. Those not present are Marks & Spencer (2), Argos (3), Debenhams (5), John Lewis (6), BHS (8), Dixons (10), Wilkinson (13), Littlewoods (15), HMV (17), Allders (18) and Rosebys (20). The absence of most of these retailers is hardly surprising, given the size and profile of Skipton and should certainly not be regarded as a weakness.

4.52 Skipton has a Rackhams (House of Fraser) department store on the High Street. While this store is much smaller than generally found elsewhere, the fact that it is here at all speaks volumes about the profile of the town and its customers. Rackhams pulled out of many smaller towns some years ago when carrying out a 'rationalisation' exercise, but clearly felt that the Skipton store was worthy of retention.

4.53 Other National retailers represented in Skipton include Burton, Clarks, Clintons, Laura Ashley, Wallis, Hawkshead, Body Shop and H Samuel. Additionally, there are a number of independent stores which add to the vitality of the town centre including, for example, Clare Whitakers Confectionery and Humphreys at Walkers Bakery, both of which produce fine hand made chocolates, the Wright Wine Company and Shaw Galleries in Craven Court. These and other attractors are likely to draw customers from a wide area. Additionally, it is noted that Whitakers and Humphreys manufacture chocolates and distribute them throughout the UK and overseas from Skipton. Tables listing retailers in selected sectors, both in Skipton and in the benchmark centres are included in the Retail Gap Analysis at the end of this section.

4.54 The number and quality of outstanding retail requirements for a town is an indicator of both the demand for space and of retailers' perceptions of the centre. A large number of requirements may suggest a lack of available space/appropriately sized units in a town/city centre and/or an improvement in desirability brought about by changes in circumstances.

4.55 The Focus property database includes retailer and leisure requirement reports for the majority of towns and cities across the United Kingdom. This database registers 22 requirements for space in Skipton as at 20 February 2004. In October 2003 Skipton was ranked 264th out of some 700 towns and cities across England, Scotland and Wales with 25 published requirements. Property Data (another database) listed 26 retail and leisure requirements for Skipton as at 20 February 2004.

4.56 These requirements must be treated with some caution as not all are for town centre locations and not all are for retail property. Furthermore, some operators will publish a requirement for every town where they are not currently represented, with no genuine intention or pressing desire to locate there. The Property Data list is similar to that of Focus and the table overleaf is a compilation of both lists discounting duplicates, obvious anomalies, out of town operators, and companies which have recently taken space or are known to be well progressed in negotiations to acquire. These account for a total of approximately 9,128m^2 (98,250ft^2) of floorspace based on the average size of each requirement.

Retailer	Min m2	Max m2	Average Size Requirement
Argos	232.25	371.6	302
Arthritis Research Campaign	92.9	139.35	116
Bag Express Ltd	18.58	69.675	44
Caffe Nero Group plc	92.9	185.8	139
Card Fair	92.9	232.25	163
Card Warehouse Ltd	92.9	232.25	163
Carphone Warehouse	69.675	139.35	105
Claire's Accessories	46.45	92.9	70
Dunelm (soft furnishings) Ltd	1858	4645	3,252
Edinburgh Woollen Mill	185.8	0	186
Elvi	139.35	0	140
Ethel Austin	185.8	696.75	441
Greenwoods (Menswear) Ltd	92.9	139.35	116
Greeting Card Group	92.9	232.25	163
Hair Cuttery	55.74	139.35	98
Holland and Barrett	92.9	139.35	116
Jack Fulton Frozen Food	139.35	371.6	255
Jane Shilton PLC	55.74	83.61	70
Marie Curie Cancer Care	46.45	92.9	70
Mc Donalds Restaurants Ltd	287.99	0	288
Noble Organisation	139.35	464.5	302
Ottakers	139.35	278.7	209
Past Times	92.9	139.35	116
Pets at Home	232.25	418.05	325
Pizza Express	115.196	199.735	157
Shelter	65.03	92.9	79
Special Occasions	92.9	139.35	116
Specsavers Optical Superstores Ltd	102.19	130.06	116
Stationary 4 Less LTD	92.9	0	93
Supergifts Company Ltd	278.7	557.4	418
Superpound	278.7	557.4	418
The Works	139.35	116.125	128
Toto Bookmakers	78.965	162.575	121
Tuscany Pizza	232.25	0	233

4.57 We are aware of a number of other retailers who, whilst not publishing their requirements, are known to wish to be represented in Skipton. Many retailers, particularly those regarded as more 'up-market', do not publish requirements at all, but will consider opportunities put to them if the location, site and town profile meets their criteria. We are also aware, from our survey, of a number of existing retailers seeking new premises within the town centre.

4.58 When these requirements are considered against the benchmark towns, the results are interesting, although they must be viewed alongside the profile of each centre. Generally, the larger the retail area of the town centre, the more requirements one might expect for that town (up to its natural saturation point).

4.59 The Focus retail requirements are set out below for the comparison towns and the rankings for the requirements are all from October 2003.

Town	Total Retail Floorspace m2	Focus Ranking	No. of Requirements
Skipton	45,242.30	264	25
Northallerton	50,175.29	264	25
Kendal	58,527.00	245	27

Retail Centre Rankings

4.60 Experian Goad produce a yearly retail centre rankings report which, up until 2002, covered the top 300 retailer centres, but from 2003 onwards, only covers the top 50 retail locations nationwide and then looks at the top 10 centres in each region. Skipton does not feature as one of the current top 50 retail locations, nor does it feature in the current regional rankings for Yorkshire and Humberside. The rankings are worked out by comparison and scoring of a number of factors. These are weighted by importance and include:

- The number of multiple retailers in a centre;
- The number of service and miscellaneous outlets;
- The number of comparison retailers;
- Total floorspace:
- Floorspace of multiple retailers;
- Vacant floorspace; and
- The number of key retail attractors.

4.61 The retail attractors comprise a variety of national multiple retailers which Experian believe are key to the numbers of people visiting a centre. They include retailers such as BhS, Boots, Dorothy Perkins, Marks and Spencer, McDonalds and Woolworths.

4.62 The table overleaf sets out the rankings according to Experian Goad of the Yorkshire and Humberside region.

4.63 It is interesting to note the ranking in this table of Harrogate, which is a well developed and attractive town centre. It has a varied and good quality retail offer, and its ranking demonstrates that it is likely to attract shoppers away from Skipton given the strong links which exist by way of the A59. This is borne out by the responses to our household survey, which indicate that over 15% of residents in zone 4 and over 20% of those in zone 5 (as well as lower proportions in other zones) normally choose Harrogate to shop for clothing, footwear and other fashion goods.

Town / City	Change in Regional Rank 2002 - 03	Regional Rank 2002
Leeds	0	1
Meadowhall	1	3
York	-1	2
Hull	0	4
Sheffield	0	5
Doncaster	1	7
Harrogate	2	9
Huddersfield	0	8
Bradford	-3	6
Wakefield	0	10

4.64 Management Horizons also produces a retail centre rankings report. This study is undertaken every two years and it is useful to compare its assessment with the Experian Goad Rankings as well as considering these statistics over time on their own merits. The Management Horizon rankings (now covering 1672 centres) also include retail parks and a number of out of town centres.

4.65 The table below sets out the retail centre rankings of Skipton and the benchmark towns according to Management Horizons. The rankings covered 902 centres in 1995-96, 936 in 1998-99 and 995 in 2000-01.

VENUE DETAILS		Management Horizons Rankings				FASHION PROFILE	
Venue	**Venue Type**	**2003-04 Ranking**	**2000-01 Ranking**	**1998-99 Ranking**	**1995-96 Ranking**	**Glam**	**Market Positioning Score**
Skipton	Major District	301	303	290	300	No Rating	2.43
Northallerton	Major District	351	438	450	379	No Rating	2.50
Kendal	Sub-Regional	208	214	222	191	Mister Average	2.25

4.66 Kendal is the top ranked centre of the comparison towns achieving between 222nd and 191st over the last 4 years. It is considered to perform a sub regional role however, compared to the other centres which are classified as major district centres. All of the centres have improved their ranking since 2000-2001, although Northallerton has performed better than either Skipton or Kendal in terms of improvement over the 9 year period.

4.67 The Glam rating is a somewhat idiosyncratic Management Horizons assessment of the quality of fashion offer in a centre (the classifications being Glam, Mister Average or Glum). Each fashion multiple is rated from 1 (discount) to 6 (luxury) and the glam rating is then calculated as the average scored across the centre. Whilst this can be a useful indicator it is flawed in that only multiples are considered and the unique added value of specialist independent retailers completely disregarded. Furthermore, at this stage only 222 of the 1672 centres – all major cities or regional or sub-regional centres are included and so neither Skipton nor Northallerton are included.

Shopping Rents

4.68 This section considers the retail rents prevalent in the primary shopping areas of the town centre. This is based on comparable information collected and analysed to provide the Zone A rents (**ITZA**), which can be defined as the rate per square metre of the first 6 metres of space from the shop front. This is a useful benchmark as it allows comparison of rents across different parts of the centre.

4.69 The prime retail area in Skipton is the High Street and Sheep Street. There is not a large amount of recent transactional information available, but a number of rent reviews have taken place and we have therefore been able to build up a broad picture of the market.

4.70 When we commenced this study, we understood from discussions with Bradys Chartered surveyors that the former Vodafone shop on Sheep Street (then vacant) had been on the market for around 12 months. This was not considered to be a matter of concern however as Vodafone are a blue chip covenant and have a lease which does not expire until January 2011. Therefore, the landlord would be unlikely to agree to an assignment unless an occupier of a similar calibre to Vodafone could be found. The alternative therefore was a sub lease which was not initially the preferred option for Vodafone.

4.71 However, the shop is now occupied by Pink – a self styled ‘bathtime for girls’ shop with branches in Preston and Lancaster. We understand that Pink has taken a sub lease co-terminous with the headlease and will be at the passing rent of £731.95/m² (£68/ft²) ITZA.

4.72 Other evidence includes Thorntons (38 High Street) which was let in November 1998 for a term of 15 years with 5 yearly rent reviews at a rental equating to £731.95 per m² (£68 per sq ft) ITZA. Extras (58 High Street) was also let in 1998 for a term of 15 years with five yearly rent reviews at a rental equating to £753.50 per m² (£70 per sq ft) ITZA. Whilst both properties should have undergone rent reviews by now, we have no information of whether or not these have been agreed. The lease of the Clarks shoe shop (28 Sheep Street) was reviewed in 2000 to a rent of £672.77per m² (£62.50 per sq ft) ITZA. Lunn Poly (2 Sheep Street) was the latest review and we understand that this was to a rent of around 753.50 per m² (£70 per sq ft) ITZA.

4.73 On the opposite side of High Street rentals are not so strong. Toy World (29 High Street) was let in April 1999 on an 8 year lease with a rent review in year 4 at a rent equating to £563.29/m² (£52.33/ft²) ITZA, and Motor World (47 High Street) was let at a rent which equates to £665.54/m² (£61.83/ft²) ITZA.

4.74 Otley Street can be considered more secondary. Whilst we do not have any transactional evidence, we are aware of rent reviews which have taken place. Craven Bakery (No. 3) was reviewed in September 2000 to a rent equating to £376.74/m² (£35.00/ft²) ITZA, and Help the Aged (No 18) was reviewed in August 2001 to a figure of £344.45/m² (£32.00/ft²) ITZA.

4.75 Rental levels in Caroline Square at the bottom of High Street are slightly higher with evidence of reviews at between £484.38/m² (£45.00/ft²) and £505.91/m² (£47.00/ft²) ITZA although this is dependent on how the rental is devalued. Because there appears to be a difference of opinion in both the landlords' and tenants' view here, we have not referred to the specific properties.

4.76 Swadford Street commands lower rentals than Caroline Square which is understandable as it is further away from the High Street. We understand that number 40 was let in October 2000 at a rent equating to £430.56/m² (£40.00/ft²) ITZA.

4.77 Keighley Road is very much a secondary location, as is confirmed by rental information received from agents active in the town. We understand that two rent reviews were undertaken on the Yorkshire Building Society and Harrison Boothman in 2002. The rents both equate to £258.34/m² (£24.00/ft²) ITZA.

4.78 In terms of Newmarket street, whilst we are unable to attain any direct comparable evidence, we understand from discussions with agents that rents vary from between £376.74/m² (£35.00/ft²) ITZA at the corner, down to £215.28/m² (£20.00ft²) ITZA further away from the High Street.

Commercial Yields on Non-Domestic Properties

4.79 The commercial yield on non-domestic property is a value-based property market indicator of viability. The yield on a property investment is a measure of the return by way of rent on the capital invested in purchasing that investment. The greater the rental growth prospects, or the more secure the income, the lower the initial yield which the investor will accept. Conversely, where a town centre is perceived by investors as having poor economic prospects, or where the rental covenant is poor, a relatively higher initial yield is required to compensate for lack of rental growth or to offset the greater risk.

4.80 Commercial funding institutions and investors effectively view Skipton as a second tier investment location – a relatively compact and robust centre with a low turnover of tenants, and a number of key multiples.

4.81 The Valuation Office Property report released in spring 2003 lists yield information for towns and cities throughout the country. On average, Skipton shows yields of between 6.75 and 8%, which we consider to be a realistic reflection of the town's investment performance.

Proportion of Vacant Street Level Property

4.82 The table below sets out the proportion of vacant retail units in each of the centres considered – that of floorspace having been recorded at 4.45 above. Some care has to be taken over the weight given to these figures as they are only a snapshot in time and do not show shifting patterns over time. Irrespective of this, they provide a useful indicator of the current health of a centre, although for larger centres, with higher levels of secondary and tertiary retail areas, the proportion of vacant property can be much higher than the national average. A plan of a centre can highlight particular areas of weaknesses and allow concentrated effort to be made in those areas to help stem the effect of rises in vacancy rates.

Location	Number of vacant units	Percentage
Skipton	13	4.71
Kendal	33	8.48
Northallerton	12	5.56
National average	N/A	10.54

Source: Experian Goad 2003

4.83 As can be seen from the table above, Skipton has the lowest vacancy rates when compared to the other centres based on the Jan 2003 Goad survey date. Since the last survey and following our inspection, these vacancy fates have fallen still further to 9 - 3.28% which is well below the national average of 10.54%.

4.84 There is currently only one vacancy on High Street - the former Oxfam unit (No 71) which is to be refurbished in due course. Situated between the British Heart Foundation and Johnsons Dry Cleaners, the unit comprises 35.3m² (380ft²) and is available at a quoting rent of £18,500 per annum exclusive.

4.85 There are also 3 vacant shops on Newmarket Street including the former Mix Music shop. The recent development of Weatherspoons however, and the proposed refurbishment of the vacant units should make this pitch more attractive, and we would envisage more interest in these shops as a result. The units offer the following accommodation:-

3 - 24.2m² (260ft²) – Quoting Rental £9,000 per annum exclusive.
3a - 48.5m²) (533ft²) – Quoting Rental £14,500 per annum exclusive.
3b - 35.8 m² (385ft²) – Quoting Rental £ 12,500 per annum exclusive.

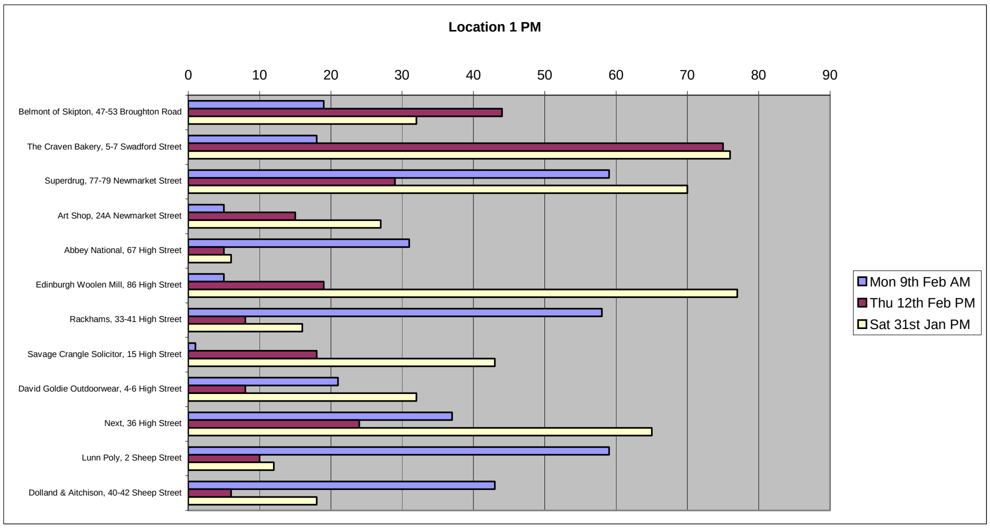
Pedestrian Flows

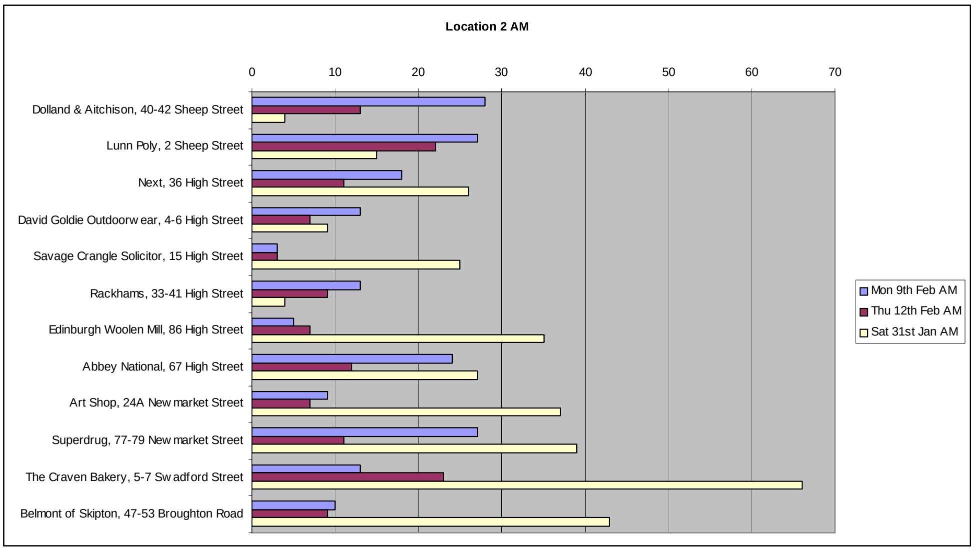
4.86 Pedestrian flow counts have been undertaken on three days – Saturday 31st January 2003 and Monday 9th and Thursday 12th February 2003. On all occasions counts were taken on set times and to set routes / locations starting at 10am and 1pm.

4.87 For analysis, we have grouped the counts into location and time of day recorded to compare results on different days. The graphs overleaf record counts of people passing each location during a ten minute period.

4.88 The greatest flows can be witnessed on Saturdays followed by Monday which is a market day. The high counts at Craven Bakery demonstrate a pinch point next to the pedestrian crossing. This area is in close proximity to a car park, which is likely to account for such a high count on what is otherwise considered less than prime.

4.89 Other peak flows are as expected in the prime core including Edinburgh Woollen Mill and Next. Superdrug, adjacent to Woolworths on New Market Street also has high counts. A more detailed analysis of these counts will be provided through mapping to GIS in due course.





Accessibility

4.90 Accessibility to Skipton at face value is good. It is well connected by a number of principal roads including the A65 from Leeds, the A59 from Harrogate, and the A629 (via A6131) from Keighley. The railway station provides regular services to West Yorkshire, Lancashire and Cumbria, and there is a good bus service to serve the outlying areas as well as providing services to Leeds, Keighley, Ripon and Burnley amongst others. Additionally, there is the Dales Bike Bus which runs in the summer months transporting cyclists through the Dales.

4.91 Whilst these provisions are comprehensive in general terms, they are not without their problems however:-

Road Network

4.92 From discussions with local people, there is a definite perception that, despite the bypass, people coming from / going to Keighley still "cut through" the town centre. Clearly this is hearsay, but it is clear that at peak times and particularly during school term time there is considerable congestion in the centre. There are also conflict issues on market days, particularly during set up and removal of the stalls.

We understand however, that a Traffic Management strategy has been undertaken and approved as reviewed earlier in our report, and we would hope that this will go some way to alleviating these problems.

Bus Services

4.93 The bus station is somewhat dated and is considered to be an unsafe environment during the evening. Here again, however, a strategy has been produced for the redevelopment of the bus station to provide more integration between different modes of transport such as the inclusion of a Taxi stand and the provision of car parking in addition to the provision of six modern bus stands.

Car Parking

4.94 Car parking is always a contentious point both with retailers and local residents. Skipton is no exception and the local perception is that there is insufficient car park provision.

4.95 The town centre car parks are detailed in the table below :-

Car Park	Number of Cars	Disabled	% Total
High Street	425	7	41%
Cavendish Street	189		18%
Coach Street including Coach Street West	125		12%
Keighley Road / Waller Hill	130		13%
Rear of Rackhams	43		4%
High St non market days	115		11%
Total	**1027**		

Source : CDC Website and Experian Goad.

4.96 In addition to the above, there is of course provision at Tesco, Morrison and Focus DIY, although these are designed for shoppers visiting these stores and not the town centre. As noted above, the new bus station facility will provide some car parking.

4.97 From our inspections, it is quite apparent that the access to the main High Street car park functions poorly. The entrance is narrow and there is no pavement to separate pedestrians and cars which leads to conflict even when it is not particularly busy. This is a matter of concern and measures to address this access should be considered.

Customer Views and Behaviour

4.98 Our household survey has identified that Skipton serves a primary catchment area for both convenience and comparison goods covering the majority of wards within, and the entire eastern and southern part of, the Craven District. Significant within its secondary catchment area are the wards of Penyghent and Settle and Ribblebanks and, to a lesser extent, Ingleton and Clapham. Only the residents of Bentham ward tend not to patronise Skipton for shopping purposes.

4.99 Within its primary catchment area, 75% of residents regard Skipton as their main comparison goods shopping centre. When looking at shopping patterns, however, Skipton is achieving a market share of 50.5% of comparison expenditure, indicating a leakage out of the area of some £39.7M. This leakage is primarily in the clothing and footwear, bulky household goods and small electrical goods sectors. Within the four Skipton wards (Skipton East, North, South and West), the town achieves a market share of 58.7% of comparison expenditure.

4.100 The town achieves a remarkably high 85% of convenience expenditure within its primary catchment area and an exceptional 96.6% of this expenditure within the four Skipton wards.

4.101 In addition, Skipton's customers include those who work in the town but live outside the catchment area, regular visitors from further afield and many tourists who are attracted by the atmosphere and location.

4.102 Whilst the majority of regular customers shop in Skipton because it is close to home, if the town was unable to satisfy their shopping requirements, or was particularly difficult to access, or threatening, it would not achieve its current turnover levels, which are healthy for a town of its size.

4.103 Customers particularly like Skipton's attractive/pleasant environment, the quality of its shops and the Market, which is patronised very widely by the District's residents and visitors from further afield (despite some residents positively disliking it and our own reservations about its declining quality – see section 6).

4.104 The fact that relatively few customers find anything to dislike about Skipton is particularly encouraging. Heading the list of dislikes (mentioned by 23% of the household survey sample and 12.5% of respondents to the street survey) is traffic congestion, followed by lack of parking. Other dislikes, mentioned by even fewer customers, include the belief that the town is too crowded, the number of poor quality and charity shops, the charges for public toilets and the state of the streets/amount of litter.

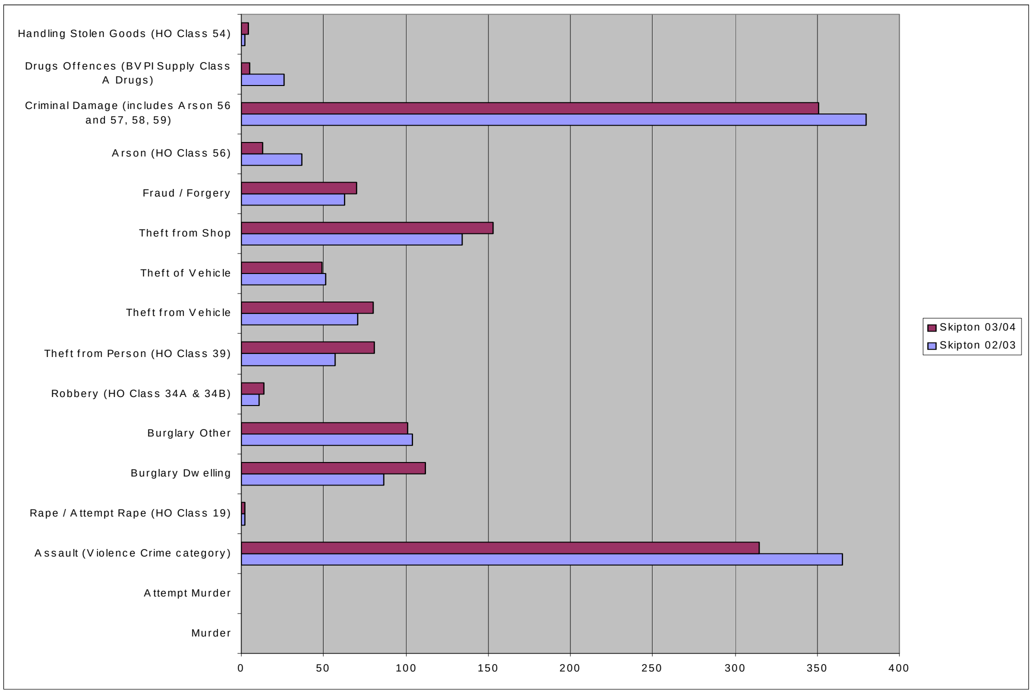
4.105 Customers would like to see a wider choice of better quality shops in Skipton – both the High Street multiples and more specialist, independent outlets. Many would appreciate fewer charity and £1 shops in the town and there are minority calls for cheaper/better parking, longer opening hours for shops and cafés, traffic reduction, pedestrianisation and improved paving.

Perceptions of Safety and Occurrence of Crime

4.106 We have analysed crime statistics provided by North Yorkshire Police for each of the years 2002 / 2003 to 2003 / 2004 to provide an indication of changes in the occurrence of recorded crime over that period. In addition, where appropriate, references have been taken from the retailer and business survey results where they relate to perceptions of safety. An abridged version of the crime statistics for the town centre is set out in the table overleaf.

Source: North Yorkshire Police

	Skipton 02/03	Skipton 03/04
Murder	0	0
Attempt Murder	0	1
Assault	365	315
Rape / Attempt Rape	2	2
Burglary Dwelling	87	112
Burglary Other	104	101
Robbery	11	14
Theft from Person	57	81
Theft from Vehicle	71	80
Theft of Vehicle	51	49
Theft from Shop	134	153
Fraud / Forgery	63	70
Arson	37	13
Criminal Damage (includes minor types of Arson)	380	351
Drugs Offences	26	5
Handling Stolen Goods	2	4
TOTAL	**1390**	**1351**



4.107 North Yorkshire Police have advised us that levels of crime throughout the Craven District are very low when compared to the situation nationally and have has fallen by 3% over the last 2 years. This is of course extremely positive for the area as a whole. It is evident however, that there has been a shift in the composition of crimes committed. Some offences, such as criminal damage and assault, have reduced – by 8% and 14% respectively, whereas others have increased.

4.108 For example, shoplifting has increased by 14%, which is naturally a concern for retailers. Other increases include Burglary from dwellings (+29%), vehicle theft (+13%) and theft from a person (+42%).

4.109 Overall, none of these figures give rise to particular concern. It is perhaps more worrying that in Skipton there appears to be some conflict between younger residents hanging out on the streets in the evening and the older population. This comment is based on our perceptions of talking to local people. Nevertheless such instances are common, either because there is less for young people to do in certain areas (particularly in more rural locations) or because alternative activities cost money which the young people do not possess.

State of Town Centre Environmental Quality

4.110 In general terms the town centre environmental quality is high. This is a key part of Skipton as an attraction. Not only does it form the gateway to the Dales, it is a historic town with a number of attractive buidings, quaint cobbled side streets and close proximity to the Leeds and Liverpool Canal.

Above :Attractive York stone paved courtyard.
Left: Attractive cobbled access to Art Gallery

4.111 The above photographs are a good example of the quality of the materials used within the centre and how the format of historic buildings arranged around courtyards provide points of interest away from the main High Street.

4.112 There is however, a reduction in the quality of materials used on those streets which run off the roundabout at the bottom of the High Street – for example, Newmarket Street (pictured below left) compared with the attractive and well maintained Otley Street (below right).

Examples of contrasting quality of public realm.

4.113 As can be seen from the photograph of Newmarket Street, the pavements here are a lower quality composite paving slab and as a result are less attractive than the more traditional materials used elsewhere. There are high volumes of traffic passing through this part of the town, and the pavements are somewhat narrow. As a result there is a conflict between the pedestrian and car at busy times of the day, and the experience for the shopper is not as pleasant as elsewhere in the town, such as Otley street.

4.114 The canal is also a key asset to the town centre and can be easily accessed from the main High Street providing a contrasting and tranquil environment. The canal towpath is in good condition and provides good walking surface, and there area also areas of green space and seating adjacent (see below).

Leeds Liverpool Canal

Good public realm adjacent to the Canal

4.115 One aspect of the town centre which we feel could be addressed is the standard of shop fronts. There are a number of retailers whose fascias are somewhat dated, as they are trading out of older "format" shops which have not been brought up to date in terms of the company brand – for example Woolworths and the main Boots pharmacy. These formats are not of most concern although they do look somewhat tired. Of more concern are a number of shop fronts which seem to have been uncontrolled. It should be noted however, that the Land Use Planning System is unable to control such signage. An option may be to draw up design guidance in consultation with the Chamber of Trade. Examples of poor signage are displayed below:-

Toyworld – too Gaudy for a Historic Market Town ?

Skipton Fashion Centre – shop front in need of moderisation.

The rear entrance to Craven Shopping Centre provides an excellent contrast in quality terms.

The signage is subtle and more suited to the historic setting and represents an appropriate and sensitive use of the building

4.116 The vacant shop units (below) on Newmarket Street represent an opportunity to ensure that on reletting after the planned refurbishment, the signage is appropriate to their setting-

Town centre vacancies

Examples of poor town centre environmental quality are difficult to find in Skipton. This Alleyway which leads off the main High Street however is somewhat run down and uninviting. This could be addressed with the use of suitable lighting and perhaps painting the walls to reflect light.

4.117 Later in this report, we provide a SWOT analysis of Skipton. The town centre environmental quality is of course one of Skiptons greatest strengths and, as shown by the street survey data, one of the key aspects that people particularly like about the town.

Skipton Castle and the Church. Situated at the top of the main High street making this part of the town impressive and attractive. The church also affords valuable green open space with some seating.

4.118 Tourism is not just about coach-loads of visitors from afar coming to see museums and other attractions, important though these people are. Tourism in Skipton is about visitors from anywhere, including the wider Craven District, who come to the town to enjoy the historic attractions, to take part in sporting/leisure activities, to use the available services and to shop.

4.119 Tourism is not a new phenomenon for Britain's historic towns - many of them have been important visitor centres for centuries. A vital ingredient of successful historic towns is the lively and thriving environment created by the shopping areas in the historic core.

4.120 However, increasing competition from out of town shopping centres and, more particularly, from easily accessible higher order towns and cities, has led to an awareness of the need to re-address the development and management of historic town centres.

4.121 Research undertaken by Donaldsons and others has clearly demonstrated that tourism and retail activity are inextricably linked in historic towns, with a large majority of tourists combining shopping with visiting attractions. Studies have found that expenditure is not merely on refreshments and souvenirs, but also on a wide range of goods including clothing, footwear, gifts, stationery and books.

4.122 Studies have also found that the overall quality of the shopping environment is an integral part of the success of both tourism and shopping in historic towns. In one such study, ("Retailing in Historic Towns", Donaldsons for the EHTF, 1992), visitors were asked to rank in order of importance aspects of the town centre and top of the list came retail mix, closely followed by environment. Accessibility also ranked highly, with ease and availability of parking being the most important factor in car accessibility. The importance of specific environmental aspects was also analysed and although most visitors considered nearly all aspects important, the areas given highest priority were 1) cleanliness of the town and 2) pedestrian areas/pavements being well maintained and traffic-free.

4.123 In 1995, Donaldsons carried out further research for the EHTF, into the performance of Historic Towns in which the retail performance of 21 towns was compared with the UK average. The historic towns performed better than UK average constantly from 1982 to 1992, roughly on a par in 1992-93 and then started to fall behind from 1994 onwards.

4.124 The study found that a key issue for the investor is the competitive position of historic towns relative to nearby competing centres. Investors are aware of the importance of a clear strategy for the town centre which identifies the position for the continuing investment that is needed in both the public realm and private property for the town to maintain its competitive edge. Although historic towns/cities are still attractive to investors, many are vulnerable which means they have to produce strategies which have a real effect in maintaining the attraction of the centre to visitors and shoppers. These strategies need to address the issues which have shown themselves to be of greatest importance in studies carried out by Donaldsons and others. These issues are:

- Ease of accessibility and quality/availability of car parking;
- Quality of environment;
- Range and quality of shopping;
- The quality of the tourism offer - especially where the leisure offer of competing centres is improving; and
- Opportunities to live, work and play.

4.125 Donaldsons has subsequently undertaken numerous works of research in individual and groups of towns of varying sizes and types, including historic towns and cities.

4.126 The wealth of information we have obtained from all these studies over the years has brought us to a number of conclusions. The range and quality of overall offer in the centre is key to sustaining footfall, trade, property values and investment. Historic towns should be able to exploit this diversity both to the local catchment and to tourist visitors. Historic town centres have to compete with other towns and out of town centres, both in the attractiveness they offer to visitors and in the ease of access. They have many advantages which they can exploit:

- Historic streets if pedestrianised and treated sympathetically in urban design terms can provide a pedestrian environment superior to that of any artificial shopping mall;

- Historic towns often lie at the centre of bus networks and close to railway stations and are therefore accessible to those without, or who do not choose to use, cars.

4.127 Whilst it has been found that in many cities, the majority of shoppers do not arrive by car, but by public transport, bicycle and on foot, the car is still of importance, particularly in the smaller towns. To exploit their potential accessibility, historic towns need to:

- ensure that there is always a supply of short term parking space within an easy walk of the core, available at a reasonable price;

- ensure that longer term parking takes secondary priority;

- ensure that there are good signs and secure, high quality pedestrian routes between the parking and the retail core and around the town centre. These should be well lit, properly surfaced, free from conflict and a pleasure to use.

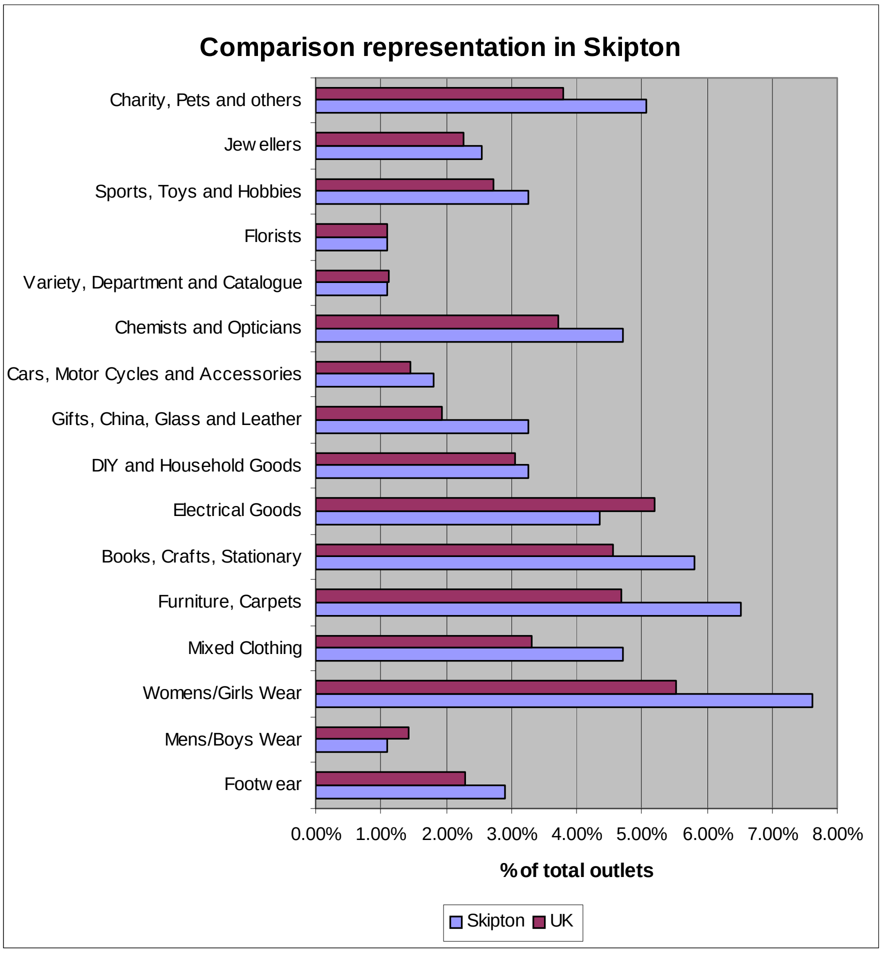
4.128 Historic towns and cities have a natural advantage over their more modern counterparts. However, they can no longer rely on those features which have brought visitors into their centres in the past. While large numbers of people may still come to see the cathedral/church, the museum, the famous birthplace or the architecture, today's visitor destination has to be dynamic - it has to encourage greater numbers of visitors to come back again and again by creating a unique identity for itself. It has to achieve a competitive edge: it has to be easily accessible, easy to get around in clean and pleasant surroundings; it must offer a range of café and restaurant facilities to encourage a prolonged visit; it must offer an appropriate mix of "high street" shops and small outlets specialising in market niches and providing retail depth. It must take steps to attract visitors by making itself a place to enjoy and by promoting itself as such.

5 Retail Gap Analysis

5.1 This part of the report considers the retailer representation by sector in Skipton, both in terms of multiple retailers and independent operators and benchmarks the offer in Skipton against that in the comparator towns referred to elsewhere in this report.

5.2 We have first considered the proportion of outlets within each comparison sector (as defined by Goad) compared with the national average. The table below reflects the information provided by the Goad report of January 2003 referred to above.

Comparison Provision



5.3 The most noticeable feature of the above table is that Skipton has a considerably higher than average proportion of outlets retailing womens and girls' wear – which seems to contradict the views/perceptions of large numbers of consultees during the course of this study. However, around half of these units are very small and there are a number of multiple operators not present in the town. There is also a higher than average proportion of mixed clothing outlets, charity shops furniture / carpets shops, book shops and chemists, with the remaining composition of comparison retail falling close to the national average.

5.4 The only area of provision which falls below the national average is that of menswear which is not particularly well represented in Skipton. The only represented multiples are Burtons, Next and Greenwoods, with the Burtons outlet comprising a shared store with the Dorothy Perkins brand. There are, however, a number of independent menswear retailers, such as David Goldie, which specialises in country and outdoor wear but which also stocks other clothing including formal dress for hire.

5.5 The table set out at the end of this section detail the operators in selected retail sectors in each of the benchmark towns. We have considered retailing within the following categories:

- Department/Variety Stores
- Footwear
- Recordings/Music
- Ladies Wear
- Mens Wear
- Sports Shops
- Telephone Shops
- Furniture
- Books
- Ladies Accessories/Lingerie

5.6 Each of the sectors are considered for Skipton and the benchmark towns and gaps in the offer for Skipton are subsequently identified, as well as areas where the town appears to be well represented.

Department / Variety Stores

5.7 Skipton's provision of department stores includes Rackhams, Sunwin House and Woolworths. Rackhams commands a prime position on the main high street, occupying a row of original buildings which produces an attractive façade, but which creates problems in terms of layout. The store is also much smaller than average and, as a consequence, does not meet the standard normally found within the House of Fraser group. It is unable to stock the ranges found elsewhere and appears somewhat cluttered in some areas of sales space. Nevertheless, the fact that a quality department store is in a town of the size of Skipton is an indicator of the health of the centre – if there was insufficient business to achieve the company's required turnover, the store would probably have closed some years ago.

5.8 Woolworths is located at the bottom of High Street facing Caroline Square. The format of the store seems somewhat dated: the shop front in particular is a little bland and whilst it does not stand out significantly like other shop fronts mentioned earlier in the report, in our view it could be brought more up to date.

Rackhams Department Store

Superdrug and Woolworths

5.9 Sunwin House is a purpose built department store facing Swadford Street and containing a large food hall, post office and travel agency, as well as the 'usual' departments found in such stores. Whilst forming a valuable element in Skipton's retail offer, the store inevitably suffers from a widely held perception of the Co-op as a second rate operator, catering largely for the older end of the value-seeking market.

5.10 Northallerton also offers three department stores – Barkers, Boyes and Woolworths. Barkers is an old-established good quality independent business, with a fashion based store on High Street and a large out of centre furnishing store on Yafforth Road. Boyes is a multiple retailer, catering mainly for the discount market.

5.11 Kendal too has three department stores – Beales, Woolworths and Marks & Spencer. Beales is a smaller multiple operator, having just 12 branches mostly in the south of England and is a high quality store.

Footwear

5.12 There are six shoe shops in Skipton with three multiples represented – Clarks, Stead and Simpson and the discount retailer Broughton Shoe Warehouse. The independent retailers are C & H Brown in Newmarket Street, Tootsie in Swadford Street and Beryl 11 in Victoria Square, while a number of other shops and the department stores carry a range of shoes, walking boots etc.

5.13 Northallerton has two multiple footwear retailers – the mid market Stead & Simpson and the more up-market Charles Clinkard (which has 12 branches in England, mainly in the North), catering for men, women and children. Barkers also stocks high quality footwear for men and women.

5.14 Kendal has the discount footwear retailer Shoe Zone and several operators selling shoes at discounted prices in the K factory outlet centre. The town also has a large Famous Footwear shop (a subsidiary of Stead & Simpson), Clarks and the more specialised Moshulu and Hotter.

Recordings / Music

5.15 Following the closure of Mix Music, specialist provision in Skipton is limited to shops selling sheet music and instruments, which include Time and Tune and the Skipton Music Emporium. W H Smith sells a limited range of CDs (limited to the 'Top 40' and audio books), DVDs, videos and computer games. Woolworths also sell a range of these goods.

5.16 Northallerton's provision in this sector is also limited, comprising two small shops in an arcade retailing instruments and sheet music. W H Smith and Woolworths are in the town, both selling a range of recorded music and videos. In Kendal are two specialist multiple retailers - Our Price and MVC. The Our Price brand has deteriorated in recent years, with retailers such as HMV and Virgin commanding the prime positions in more major centres. MVC are a discount records format. Kendal also has a shop selling instruments and sheet music and, again, W H Smiths and Woolworths are in the centre, both selling a range of these goods.

Ladieswear

5.17 The provision of Ladieswear in Skipton is above the National Average (in unit numbers) at 7.61% compared to the national average of 5.52%, although many of the shops are relatively small.

5.18 Several multiple fashion retailers are present in the town, mostly mid-market operators, including Dorothy Perkins and Jumper, and the mass-market/value brands such as Bon Marché and New Look. Other multiple traders include Edinburgh Woollen Mill, Hamiltons, Laura Ashley, Next and Wallis, while Rackhams stock a range of designer wear and everyday clothing and houses a number of fashion concessions including Country Casuals, Alexon and Planet. There are also several independent fashion retailers in the town centre (for example, Howards of Skipton, Flaire Fashions and Diva) and a number of market traders stock a variety of (mainly) discount clothing available on the four market days each week.

5.19 The benchmark towns offer a similar selection of multiple retailers, both having Dorothy Perkins, New Look, and Edinburugh Woollen Mill, although the latter tends to be geared towards the tourism trade rather than the local market. Northallerton contains fewer fashion retailers than Skipton and surprisingly little in the way of an 'up-market' offer, although Barkers offer a range of designer clothing – with a greater choice than is available in Rackhams in Skipton. .

5.20 Kendal has Monsoon and Country Casuals, which are considered better quality ladieswear retailers (although Barkers in Northallerton also stocks a Country Casuals range of clothing). Beales in Kendal stocks collections of mid market and designer ladieswear, including Wallis, Oasis, French Connection and Betty Barclay.

Menswear

5.21 The provision of Menswear / Boys clothing in Skipton falls below the national average, although there are more specialist outlets than in Northallerton and nearly as many as in Kendal. Whilst there is a lack of quality multiple shops, Rackhams stock several high quality brands, including Balmain, Dior, French Connection, Timberland and Tommy Hilfiger. On market days, at least two of the stalls stock menswear.

5.22 Multiple operators include Next, Burton, Greenwoods, Jumper and Edinburgh Woollen Mill, the two latter shops again perhaps more tourism biased. Among the independent retailers is David Goldie, which is a quality gentleman's outfitters, also specialising in country/outdoor wear.

5.23 Northallerton has 6 menswear shops, 5 of which also sell ladieswear and some of those sell other goods too. Multiple operators include Benetton and Mackays. However, Barkers houses a number of collections, including ranges by Christian, Camel, Sand, Marlboro and Magee.

5.24 Kendal offers a wider selection of specialist menswear shops, both of multiple retailers (e.g. Maelstrom, Burton and Greenwoods) and independents (e.g. David Kerr and Petruso). Here too the department store (Beales) stocks a range of menswear collections (but rather more limited than Rackhams or Barkers), including Ben Sherman, Timberland and French Connection.

Sports / Camping

5.25 Outdoor pursuits are a key trade in Skipton and the town has an excellent cross section of outdoor shops from the more general leisure orientated multiple shops such as Hawkshead in Craven Court, to more specialist shops such as Ultimate Outdoor (formerly George Fisher). Other multiples include Millets, Yeomans and Mountain Warehouse, and discount outdoorwear specialists such as Tog 24. Millets is perhaps the most disappointing, with its shop looking tired and in need of a refit, to bring it into line with its more high profile stores. The proliferation of these stores is clearly a reflection of the tourism trade and Skiptons position at the gateway to the Dales.

5.26 Cyclists are well catered for, by the Skipton Bicycle Shop which offers specialist mountain bicycles as well as those for road, race and leisure, and Dave Ferguson Cycles, which caters for the more budget end of the market and the general leisure cyclist.

5.27 Kendal has the ever popular JJB sports shop as well as a much larger Millets store and a branch of Yeomans, together with some 7 independent outlets and a selection of operators selling these goods in the K factory outlet centre.

5.28 In contrast, Northallerton is relatively poorly served in this area, with a Yeomans half the size of that in Kendal and 5 small independent outlets.

Telephone Shops

5.29 The position of the mobile phone industry can only be described as in a state of flux. Ultimately this position has an effect on its retailers. Vodafone have vacated their shop in Skipton, leaving only a Link and a Link Telecom.

5.30 Kendal is better provided for having a Phones 4 U, Carphone Warehouse and a Vodafone Shop as well as the local Lakeland Communications. Northallerton has Total Communications and The WAP Store.

5.31 This sector is more than likely to undergo rebranding and change over the next few years.

Furniture

5.32 Like many market towns, Skipton has a good provision of furniture shops, including Belmont of Skipton, Pottery and Pine (off Mill Bridge) and the Yorkshire Sofa Company. It does not, however, have the representation of antiques shops often present in historic or tourist orientated towns although there is a quality antiques centre located on Cavendish street.

5.33 Northallerton has three furniture stores in the town centre, including the large multiple trader, Durham Pine. Barkers out of centre furnishing store is very large and stocks a very wide range of furniture and floor coverings. Kendal offers 8 furniture stores, including The Discount Bed Centre and a spacious unit on Sandes Avenue – Home Designs.

Books

5.34 Skipton has a number of independent bookshops (for example Cornerstone and Alley Books), although there is an absence of the major multiples such as Waterstones. The benchmark centres also have a number of independent shops and both benefit from the presence of Ottakers.

5.35 Whilst not classified as a bookshop, W H Smith is well known as a book retailer and is represented both in Skipton and the benchmark towns. The Skipton store has a very prominent position within the town being located on Sheep Street and in close proximity to Boots.

Ladies Accessories and Lingerie

5.36 Skipton's provision in this sector is limited to three independent shops (Tudor Box, Xtras and Dalesox), and there is a lack of the more well know brands such as Clares Accessories which is represented in both of the Benchmark Towns. Rackhams offers well known brands of lingerie, nightwear and ladies' accessories.

5.37 Kendal has both Claires Accessories and Accessorize (within the Monsoon store) as well as two hat shops, a lingerie shop and a relatively small range of lingerie offered in Beales. In Northallerton, in addition to Claires Accessories, Barkers stocks ranges of lingerie, nightwear and ladies' accessories.

6 Skipton Market

6.1 We have briefly mentioned the street market under the Diversity of Uses section in terms of its origin. The market is long established and appears to trade very well, although a number of traders occupy their pitches on fewer than the four operating days each week.

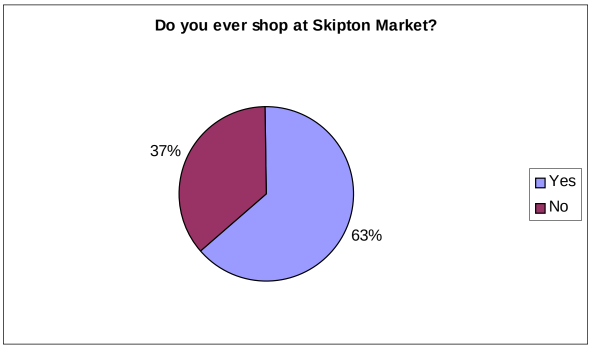
6.2 The market is 100% let, rents being paid to Craven District Council which manages the facility, with a supplementary fee paid to the retailer/business owner outside which each stall is placed. For example, the Abbey National receives a rent from the Groceries and Provisions stall located outside.

6.3 Once renowned for the range and quality of fresh produce available, the Market's offer in this sector has contracted and, on our last visit, we found just one stall selling fruit and vegetables, one excellent cheese stall and a van parked at the bottom of Sheep Street selling fresh fish. There were also two stalls selling plants, one of which offered a selection of cut flowers too. In addition, there are at least three stalls selling loose and boxed/packeted sweets or chocolates. During other visits we have found a few additional food stalls, including one selling dry goods, an egg and preserves stall and a well stocked butcher's van (which we understand is in Skipton only on Saturdays).

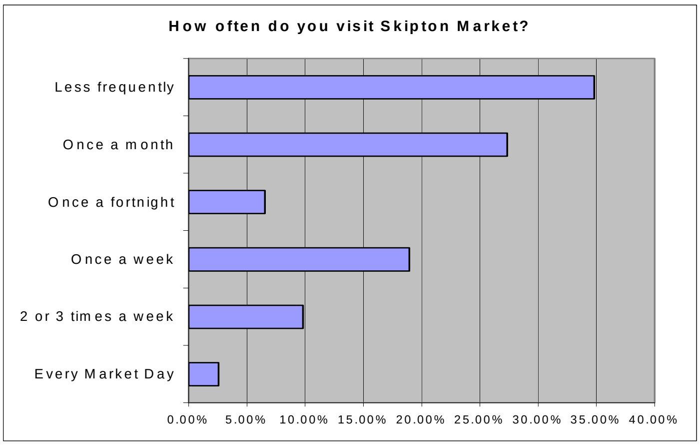
6.4 Far more prolific are stalls selling household goods – including soft furnishings, hardware and pottery – and clothing – particularly discount ranges of ladies' separates, underwear and mens' shirts. There are three stalls selling discount bags, purses etc and a fourth selling high quality leather handbags, purses and belts. Other stalls offer a range of goods including watches, stationery, cards, mobile phones and slippers – but, unusually, we have not found any stall selling shoes during our visits.

6.5 Overall, we believe that the quality of the market has declined over the last few years, in terms of the standard of goods on offer (with a few notable exceptions), the choice of goods available, the frequently shoddy displays and many of the awnings and tables themselves which are dated, in poor condition and simply unattractive. In our opinion, the market also creates a problem in that there is a lack of permeability between the stalls, making crossing the High Street very difficult at many points. Crossing is particularly arduous for the elderly and infirm.

6.6 We have drawn out a number of interesting results from the household survey, and summarise these below.



6.7 Over 63% of respondents who ever visit Skipton for shopping purposes sometimes patronise the market. The frequency with which they shop at the market is demonstrated in the table below.



6.8 The results here are interesting in so much as the majority of people answered "less frequently" (35% - spread relatively evenly across the survey zones), with the next most popular answer being once a month (27%). Just over 30% of visitors shop at the market at least once a week, while a very few patronise the facility every market day.

6.9 From our general discussions with local people, we sense an irritation in some quarters with the disruption the market brings and a dissatisfaction with the range of products in terms of there being too many discount stalls which, in many peoples' opinion, brings down the standard of the market. There is also a perception that local people shop in Skipton on non-market days as it is easier to get around the town centre – although the Household Survey reveals that a third of those living nearest the town centre patronise the market very regularly.

6.10 Nevertheless, this means that two thirds do not visit very regularly (and a third less frequently than once a month). This raises the question that if people locally are using the market relatively infrequently, should the market run on fewer days during the week?

6.11 The GVA Grimley survey of coach visitors found that around half of respondents said they would continue to come to Skipton even if the Market was not there, although 23% said they would not.

6.12 We are advised by retail agents active in the area that better quality, multiple retailers are deterred from seeking representation in the town centre because of the market. Many hold the view that the disruption to trade on four days per week, including the busiest trading days, renders the necessary investment too precarious.

6.13 The very low vacancy rate and the healthy requirement list seem to conflict with that view, which is possibly held by certain, but not all, non-represented retailers.

6.14 Most retailers clearly appreciate the benefits of a street market, but there seems to be a demand from some quarters of a reduction in days of operation, or a relocation of the facility, away from the shop frontages.

7 Health Check Conclusions and SWOT Analysis

7.1 The following section comprises a SWOT analysis of Skipton Town Centre, and is made up of our observations and information gained from discussions with local people and the results of the questions from the retailer and business questionnaire.

Strengths

- Skipton's **location** is a key strength. Its proximity and links to major conurbations and locations at the gateway to the Dales brings a lot of people to the town and therefore money into the local economy.
- **Attractive Environment** – Skipton is a very attractive place to both live and visit, and adds to the shopping experience. The castle and church are a key part of this standing in a prominent position at the top of High Street.
- **Affluent catchment population** – Socio-economic data reveals a relatively affluent population with high levels of car ownership, owner occupation of housing and employment in better paid jobs.
- **Skipton Market** – The market is a key part of Skiptons history and a key attraction for tourists. The market is also useful to residents and further widens their choice of a wide range of products.
- **Leeds and Liverpool Canal** – once considered to the legacy of an industrial age gone by, canals have gone through a considerable renaissance in recent years. Firstly recognising that if clean they represent an excellent opportunity for recreation and leisure, and secondly the realisation that the waterside has considerable development value which has lead to development and regeneration. Skipton has an excellent canal with businesses which runs boat trips on a day basis and for holidays. Additionally, the canal brings independent holidaymakers into the town by boat. The waterside has also created development opportunities and some attractive housing, and also provides opportunities for walking, cycling and fishing.

Weaknesses

- **Too many charity shops** – a common dislike by people in general and whilst in retail composition terms, the Goad information does not show too many shops, it is perception that is key – especially that of retailers who feel that their trade is affected by these shops dragging down the general feel of the town. There is also a perception amongst local people that Skipton once had more quality independent shops and that the quality is declining. Charity shops only add to this concern.

- **Lack of shop units to accommodate demand from modern retailers** – Existing unit shops are in general too small, and period style buildings too old to convert to modern open plan floorplates required by multiple retailers.

- **Litter** – is a common problem in today's society although the comments regarding litter in the retailer survey seem to stem from the market operation. This issue could perhaps be reduced through discussions with traders.

- **Chewing Gum** – is very noticeable and a very common problem throughout the country. It is difficult and expensive to remove, but it is particularly noticeable in Skipton because of the attractive York Paving.

- **Traffic** – there is a general perception of traffic congestion problems and also in terms of crossing the roads in the retail area, which is at times dangerous – especially for the elderly. The pavements in parts of the town are narrow and adjacent to heavy traffic, and Caroline Square is very busy. There is also only one pedestrian crossing on High Street, and we would question whether this is sufficient.

- **Skipton Market** – Whilst the market is also one of Skipton's strengths, the number of discount retailers within the facility are lowering its overall quality and affecting its reputation. Also the appearance of the market has declined, because of the state of the stalls and awnings. It is also the case that there is a lack of permeability for pedestrians as there are few breaks in the stalls along the High Street. Those breaks which do exist are often difficult to identify.

- **Main Car Park Access –** The entrance to the main car park adjacent to Clare Whitakers is very narrow and there are no footways. This leads to considerable conflict between the pedestrian and the car / coach user and the opening of a new bar close to the corner of the car park entrance will only intensify this position.

Opportunities

- **Implementation of proposed traffic management measures.** Traffic volumes clearly detract from the attractiveness of the centre, particularly at Caroline Square. It is essential that measures are put in place to mitigate this position.

- **Redevelopment of Bus Station to include retail offer.** The bus station is at present a poor facility. The provision of high quality public transport facilities is essential to the development of integrated transport systems.

- **Redevelopment of the main High Street car park for retail and leisure uses.** The High Street represents a key opportunity within the town centre for regeneration and redevelopment potentially to underpin town centre activity.

- **Alterations to the layout of the main car park access** – There is currently a significant level of conflict between traffic coming into the car park and pedestrians moving between the High Street and the car park. We consider that this could be better prioritised and defined making this a more pleasant transition for the pedestrian and more straight forward for vehicles.

Threats

- **Decline in Tourism.** Clearly, the economy of Skipton benefits greatly from tourism and it would be adversely affected by any decline in numbers visiting, arising from factors such as recurrence of Foot and Mouth Disease or a fuel crisis.

- **Decline of standard, presentation, offer and management of the Market.** The market is a key attraction of the centre and its history. It is considered however, that its offer needs to improve along with its presentation and management.

- **Inappropriate development.** Any proposed development of out of town retail facilities, directly competing with the town centre's offer must be viewed as a potential threat to Skipton's vitality and viability. In the town centre, new developments which do not compliment or enhance the historic built form would also pose a threat and, in our view, should be resisted.

- **Extension/enhancement of retail/leisure attractions in competing centres.** Many other towns have engaged in a programme of improvement/development to increase their attractiveness to visitors. For example, Keighleys shopping centre has been refurbished and the edge of town retail parks extended. Construction of Bradford's new Broadway development is due to commence shortly and will include a large Debenhams department store. Such developments may well entice Skipton's more local patrons away from the town centre.

8 Conclusions and Recommendations

8.1 Skipton is a healthy and vibrant town which performs several distinctive roles, all of which are interrelated:-

- It is the administrative centre of the Craven District.
- It provides essential shopping facilities both food and non-food, for its residents and those located within what is a relatively large catchment area.
- It is a centre for leisure activity, both in terms of evening entertainment, and sporting facilities.
- Its historical attributes, attractive setting and strategic location as the gateway to “The Dales”, make Skipton a honey-pot for tourists, and day-trippers, from the conurbations of Leeds, Bradford and Harrogate nearby.

8.2 It is no surprise therefore, that Skipton has a substantial, wide ranging mix of retailers.

8.3 There have been significant requirements from multiple retailers wanting to locate in the town centre. It is here where Skipton’s key problem area can be identified. Because of the historic nature of the town, many of the unit shops are not suited to a modern retailer in terms of size, configuration and quality of units. It is recommended therefore, that new development should be brought forward within the core retail area. The obvious, and perhaps, only site, which is capable of accommodating such development, is the main car park site.

8.4 We understand that the feasibility of bringing forward retail development at this location has been studied. It is our opinion that there are a number of factors which are critical to the success of any development at this location.

8.5 Firstly, and perhaps most critically are vehicle and pedestrian movements. These will need to be reprioritised. The current access arrangements to the car park are poor, and there is considerable conflict between vehicles and pedestrians.

8.6 Despite the fact that the current arrangement in frustrating for both pedestrian and vehicle users, there is a wider issue, in terms of footfall, and the proximity of any scheme to the prime retail core. It must be possible for pedestrians to move without conflict between the core area and any new scheme, otherwise it will be viewed as a secondary location. Although the final scheme will include car parking, unless there are clear and defined links to the existing town centre, it is considered that mainstream multiples would look on this location unfavourably.

8.7 In addition, and for the scheme to be successful, it will require the presence of a high profile main stream, multiple retailer, to act as an anchor in order to draw footfall into the scheme. An attraction such as Booths or Waitrose would provide such an anchor.

8.8 It is also important that a balance is found in terms of the scale and massing of buildings. The development should be substantial enough to be an attraction however, it must be of sufficient quality to be sympathetic to the historical surroundings.

8.9 Street cleansing including litter and chewing gum are identified as weaknesses. Litter is a particular problem on market days.

8.10 Chewing gum, it is accepted, is a problem in most of our towns and cities. It does however, detract from the otherwise high standard of the town centre environmental quality, particularly the York Flags which are part of this rich environment.

8.11 Whilst the cost of removing chewing gum is considerable, some local authorities have tackled the problem head on.

8.12 Sheffield City Council for example, cleaned some 40,000 m^2 of paving during 2003, and put in place other initiatives to encourage people to dispose of gum in a sensible manor. We suggest that consideration of these initiatives is worthy of further study.

8.13 Traffic management is also identified as a problem area. We understand that the various initiatives outlined are progressing, and we fully endorse such measures.

8.14 Skipton market is identified in the SWOT analysis as both a strength, and a weakness. In general, we consider the market an asset, however, it is evident from our inspection, that there are several areas where, in our opinion, the quality of the market could be improved:

- There has been a perceived decline in the quality of goods offered at the market. Better management of the mix of stalls should be considered.
- The quality of the awnings is poor. These should be renewed.
- The permeability for pedestrians crossing the High Street is poor. Whilst there are breaks in the stalls, these are difficult to identify, and are particularly difficult, given the cobbled sets, for the elderly and infirm to navigate.

APPENDICES

Appendix 1 – Location Plan of Skipton

Appendix 2 – The Retailer/Business Survey Analysis

Appendix 3 – The In-Street Survey Analysis

Appendix 4 – The Household Survey Analysis

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