Prepared by:
Donaldsons
St Paul’s House
23 Park Square South
Leeds
LS1 2ND
Telephone 0113 246 1161
Facsimile 0113 244 1637

CRAVEN DISTRICT COUNCIL

Craven’s Smaller Centres
Settle Health Check

Report

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Contents

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**
F&MD	**-**	**Foot and Mouth Disease**

1 Introduction

1.1 Craven District Council has commissioned Donaldsons to undertake retail health check studies of four centres in the District, including Settle. This is to assist in the preparation of the Local Development Framework for the district outside the Yorkshire Dales National Park.

1.2 The study comprises the following elements:

- An overview of Settle and a consideration of its socio-economic profile;
- A health check of the vitality and viability of Settle; and
- A conclusion as to its existing role and how it should be treated in any replacement Local Development Framework (LDF).

1.3 The findings of our study will inform the LDF and will allow the Council to revise its existing policies and proposals for retail development in the smaller centres, with supporting justification, having regards to current Government guidance, as contained in PPG6, and the emerging PPS6.

1.4 The existing LP (adopted July 1999) does not set out a strict hierarchy of centres in the district and it is the intention of this report to form the basis on which such hierarchy may be defined. The Plan identifies the District's retail centres as follows:

Skipton	Primary retailing and commercial centre
Cross Hills and Settle	Secondary retailing and commercial centres
Ingleton and Bentham	Service settlements within the Plan area, having an identifiable core retailing area.

1.5 Additionally, the Plan identifies as local service centres:
Settle, Giggleswick, Hellifield, Ingleton, High Bentham, Gargrave, Cononley, Glusburn/Cross Hills, Sutton-in-Craven and Cowling.

1.6 These local centres are described as fulfilling an important role in providing local services and shopping facilities to a rural catchment. They also provide a centre for schooling, community facilities and local job opportunities, particularly important to those requiring work which is part-time or close to home.

1.7 The performance of the Principal Town Centre – Skipton – has been considered in detail in the Retail Study recently carried out by Donaldsons. This report considers the performance of Settle, having regard to those indicators of vitality and viability recommended in PPG6 and PPS6 as are capable of measurement and the general quality of the retail experience. The study has been informed by a street survey, and a district wide household survey supplemented by a postal retailer/business survey.

1.8 The indicators of vitality and viability recommended in Figure 1 of PPG6 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.

1.9 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 Statement lists 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.

1.10 The nature of Settle is such that there is little transactional evidence on which to base an accurate analysis of economic performance. Nevertheless, we have addressed the centre in terms of how well it performs its designated role and in comparison to the other centres within each classification.

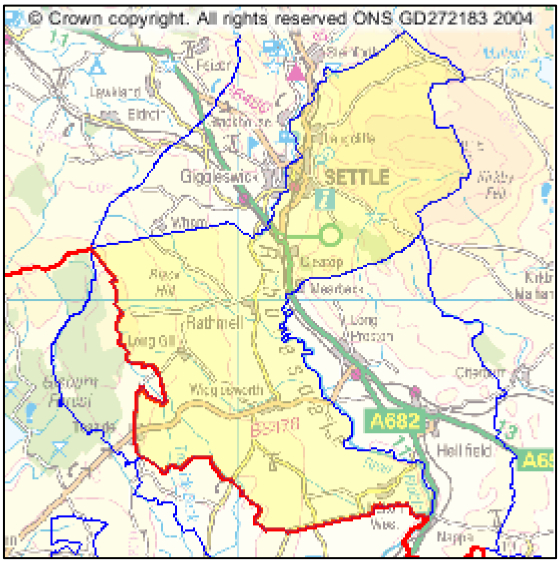
1.11 It should be noted that, whilst traditionally excluded from retail classification, we have included bars and public houses in the services category throughout this study. Opticians are classified as comparison retailers (in accordance with the Goad classification), unless they are clearly in the nature of a surgery, with the sale of spectacles an ancillary operation, in which case they have been included in the services sector. Where solicitors, accountants and other professions occupy retail units in shopping areas, they have also been included within the services sector.

2 Overview and Socio Economic Profile

2.1 Settle is located in the Settle and Ribblebanks Ward, with a population as at the 2001 Census of 3,390 of whom 3,288 live in households (the remainder in communal establishments). The town is located just off the A65 on the B6480 approximately 25 kilometres (16 miles) to the north west of Skipton on the edge of and partially within the Yorkshire Dales National Park. The centre comprises buildings from the 17th century to the Victorian era, interspersed with more modern, infill development. The retail centre is mostly concentrated around the historic market place, although there are shops outside the central area, the most notable being the recent Booths supermarket development.

Socio Economic Profile

2.2 Lifestyle profiles for Settle are set out in detail below, the data source for the majority of this information is the North Yorkshire County Council summary of key statistics from the 2001 census, unless otherwise stated.



Car Ownership

	Settle and Ribblesbank	Craven	England and Wales
Have no car or van	23.7%	18.9%	26.8%
Have 2 or more cars or vans	26.3 %	34.2%	29.4%

2.3 From the figures above, almost a quarter of the households in Settle ward have no car, which is much higher than the average for the district (18.9%). This is also quite surprising given the rural nature of the ward, although it is noted that Settle has good public transport links with the local area, both by bus and train.

Household Tenure

2.4 In Settle and Ribblebanks there were 1,551 households in 2001, comprising 97% of the resident population. The remainder of the population lived in communal establishments. The total number of households in the Craven District was 22,680.

	Settle and Ribblesbank	**Craven**	**England and Wales**
Owner occupied	69.1%	76.8%	68.9%
Rented from Council, Housing Association or Registered Social Landlord	12.5%	9.6%	19.2%
Private rented or lived rent free	18.4%	13.6%	11.9%

2.5 The proportion of owner occupiers in the ward is almost 8% lower than in the District as a whole (but close to the national average), producing a correspondingly higher level of those who rent property. There is, however, a bias towards private rented accommodation which is almost 5% greater than that of the District. The level of social housing is also higher than the District average at 12.5%, but considerably lower than the national average.

Employment

Resident population aged 16 to 74 (percentage)

	Settle and Ribblesbanks	**Craven**	**England and Wales**
Employed	65.1%	65.6%	60.6%
Unemployed	1.3%	2.0%	3.4%
Economically active full-time students	1.7%	2.0%	2.6%
Retired	19.5%	17.2%	13.6%
Economically inactive students	2.6%	3.4%	4.7%
Looking after home/family	3.9%	4.5%	6.5%
Permanently sick or disabled	4.5%	3.6%	5.5%
Other economically inactive	1.5%	1.8%	3.1%

Source: 2001 Census, ONS

2.6 The level of people in active employment broadly follows that of the district. Unemployment is very low at 1.3%. The level of retired people is higher than the both the national average and that of the Craven District.

2.7 The tables overleaf set out the percentages of males and females in the ward employed in various types of industry, compared to the national (England and Wales) average rate of employment in each activity. The tables indicate that manufacturing is a key area of employment for the ward, with 18% of males employed in this activity. Retail is another important sector for both sexes, whilst construction is an important area for male employment. Given the rural nature of the ward, it is not surprising that Agriculture, Hunting and Forestry has quite a key role to play in male employment with 10% of the workforce active in this area. Health and Social work and Education are major sectors for the female workforce, with 36% employed in these areas.

Employment by Sector – Settle and Ribblesbank Ward

Industry of Employment (Males 16-74 in Employment)	Ward	England & Wales
	Percentage	
Agriculture/Hunting/Forestry	10.05%	2.09%
Fishing	0%	0.04%
Mining & Quarrying	2.42%	0.40%
Manufacturing	17.68%	20.22%
Electric Gas & Water	1.09%	0.97%
Construction	15.38%	11.24%
Wholesale and Retail Trade; Repair of Motor Vehicles	15.01%	16.02%
Hotels & Catering	4.48%	3.71%
Transport Storage and Communication	5.81%	9.32%
Financial intermediation	1.45%	4.14%
Real Estate; Renting and Business Activities	8.11%	13.54%
Public Administration & Defence	4.36%	5.79%
Education	7.63%	4.10%
Health & Social Work	2.78%	3.90%
Other	3.75%	4.47%
	100%	100%

Industry of Employment (Females 16-74 in Employment)	WARD	ENGLAND & WALES
	Percentage	Percentage
Agriculture/Hunting/Forest	3.24%	0.82%
Fishing	0%	0.01%
Mining & Quarrying	0%	0.07%
Manufacturing	7.69%	8.75%
Electric Gas & Water	0%	0.44%
Construction	1.21%	1.50%
Wholesale and Retail Trade; Repair of Motor Vehicles	17.54%	17.77%
Hotels & Catering	12.01%	6.01%
Transport Storage and Communication	2.56%	4.27%
Financial intermediation	2.97%	5.42%
Real Estate; Renting and Business Activities	9.04%	12.24%
Public Administration & Defence	2.43%	5.64%
Education	17.95%	12.07%
Health & Social Work	18.22%	18.98%
Other	5.13%	6.02%
	100%	100%

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 28 completed questionnaires. This represents a response rate of 31% which is reasonable for a survey of this nature and demonstrates a keenness by nearly a third of the business community to be involved in the consultation process.

3.2 Responses have come from comparison and convenience retailers, a number in the eating/drinking leisure sector and 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 graphical summary of the survey responses is included in Appendix 2, while the key findings of the survey are set out below.

3.4 24 respondents operate independent businesses and the other 4 are members of national multiple businesses, which is to be expected given the rural nature of the town. Respondents display an above average awareness of who their customers are and how far they travel – which tends not to be the case in centres with a predominance of multiple operators.

3.5 There is an unusually high proportion of long-established businesses in Settle – 63% of respondents have been trading in the town for over ten years and only 8% have been in business for less than 2 years.

3.6 On average, respondent businesses employ almost 2 full time staff and 4 part time staff although the greatest number employed in a single business is 10 full time and 10 part time. In total, the respondent businesses employ 55 full time and 89 part time staff.

3.7 82% of respondents are happy with their current accommodation. Three of those who are dissatisfied find their premises too small – two anticipate relocation to alternative property in Settle and the other proposes expansion within the existing accommodation. Three of those who are happy with their current accommodation also envisage expansion within their premises, whilst a fourth may seek a relocation in Settle. Two respondents foresee possible closure of their businesses within the near future.

3.8 Over 70% of respondents have plans for investment in their premises, by way of refurbishment, redecoration, expansion etc or have recently carried out such works. Whilst some of these improvements are relatively minor, respondents clearly acknowledge the importance of property maintenance/enhancement.

3.9 Approximately one third of respondents indicate that they open regularly on Sundays (one during the summer only and one from Easter to Christmas), largely catering for visitors, rather than local people. The majority who do not open on Sundays either believe there is insufficient trade to do so or quite understandably feel that, as they work six days per week, they need a day off – two mention the difficulty of finding staff to work on Sundays.

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

- 48% indicate an improvement in trade;
- 35% indicate no change in their trading levels; and
- 17% report a decline in trade.

Over the last year:

- 43% indicate an improvement in trade;
- 38% indicate no change in their trading levels; and
- 19% report a decline in trade.

3.11 Reasons given for improvement include:

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

Reasons given for decline include former/ongoing effects of Foot and Mouth Disease and changes in consumer habits – shoppers going elsewhere. Mention is made of mothers who used to shop in the town centre before the primary school was relocated, but who now patronise only Booths. One respondent complains of lack of free parking in town.

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

- 65% expect an improvement in trade;
- 31% expect no change; and
- 4% expect a decline.

3.13 Very few provide reasons for expectation of an uplift in trade – but mention is made of improvement in business practices and finally being over the worst effects of F&MD. No respondent volunteers any reasons for anticipated decline in trade.

3.14 A handful of respondents have provided turnover details which we are, of course, treating as confidential information, but which indicates that, whilst one or two are trading at above average levels for their particular types of business, there are also retailers in the town who are clearly struggling to achieve an acceptable profit. The limited nature of these responses is insufficient to allow us to arrive at an accurate estimate of the scale of this problem

3.15 However, it is likely that those selling goods primarily aimed at the local market will find it harder to be successful as expenditure generated within the area is limited by the size of the catchment population. This point is considered in more detail under the section covering the household survey.

3.16 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. Unsurprisingly, the aspect found excellent by more respondents than any other is the attractive environment. However, when considering all the ratings, the order of aspects regarded most highly (more than 50% good, very good and excellent) is:

- Choice of places to eat and drink 74% good or better, 19% satisfactory
- Access by car 70% good or better, 26% satisfactory
- Attractive environment 70% good or better, 15% satisfactory
- Signage to car parks 57% good or better, 25% satisfactory
- Quality of shops 56% good or better, 33% satisfactory
- Settle Market 56% good or better, 33% satisfactory
- Amount of car parking 51% good or better, 42% satisfactory

We find the general high regard for signage to car parks somewhat surprising as we believe that this aspect of the town centre requires considerable improvement and that visitors experience some difficulties and confusion in this area.

3.17 Just one aspect is very poorly regarded by respondents (more than 50% poor or very poor):

- Cost of car parking 68% poor or worse

Whilst this is a complaint which tends to feature in virtually every town centre survey we undertake throughout the country, we believe that, in Settle's case, it is particularly unjustified. As may be seen below, other respondents regard the two hours free parking, centrally located, as one of the town's strengths.

3.18 Aspects which score relatively poorly are the range of activities other than shopping and the adequacy of police presence (both 46% poor or worse).

3.19 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 attractiveness/environment/historic setting of the town and its buildings. A very close second is the fact that there are so many independent, family run businesses providing excellent, friendly service. As one respondent wrote:

An individual, unique venue with the vast majority being family run, independent businesses – no multinationals. This is "market town" with its own individual identity – this is Settle's unique selling point! This is its strength and its "soul".

3.20 All but 5 respondents believe the town has weaknesses, and some list several. That most frequently mentioned is traffic passing through the town centre – and, in particular, the heavy quarry lorries.

3.21 Other features mentioned by a number of respondents are:

- untidy/haphazard parking in the Market Place;
- a poor range of shops;
- a lack of open areas/places to sit in the town centre;
- a few poorly maintained shops with untidy displays; and
- dirty areas/footpaths/neglected properties/vandalism.

3.22 Respondents were asked what improvements they would like to see in the town centre and there are many positive suggestions. Most sought after are environmental improvements – to the whole town centre, but particularly to the Market Place – suggestions include pedestrianisation, refurbishment of the ground surface, removal of parking, better management of parking, soft landscaping, hanging baskets, better signage, resurfacing of pavements, increased general maintenance, a shop front scheme. The second most popular suggestion is the banning of lorries from the town centre (presumably, except for deliveries, but that point has not been raised).

3.23 Others suggest:

- more facilities for young people, mothers and babies, children;
- provision of seating and shelter;
- improved disabled access;
- better range of shops;
- longer opening hours of cafés in the tourist season;
- better evening facilities, encouragement of new pubs and wine bars;
- increased police presence; and
- free/cheaper parking.

3.24 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

3.25 NEMS, an accredited Market Research Agency, was commissioned to undertake an independent survey among visitors to Settle. Face-to-face interviews were conducted with 150 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.

3.26 Over 50% of interviewees came from Settle and the surrounding area, while 22% had travelled from Hellifield, Ingleton, Bentham or Skipton. Others came from Burnley, Keighley, Bradford, Leeds, Harrogate and Ilkley and a few from as far away as Morecambe, Nottinghamshire, Milton Keynes and London.

3.27 Most of the interviewees were female (72%) and interviews were achieved over a wide age range – from 16 to over 65 and across the social spectrum. Slightly more than half of the visitors had come by car (78% of interviewees lived in households with the use of at least one car), while 39% had walked and 6% had used public transport.

3.28 Over 40% of the interviewees were visiting Settle for the primary purpose of carrying out food shopping, and just under 10% were in town for the primary purpose of non-food shopping). Other primary purposes of visit included work (15%) and the use of services within the town (banks, building societies, hairdresser, doctor, library etc.- 11%). Some 14% of respondents were engaging in some form or other of a leisure pursuit – browsing, meeting friends or there as tourists.

3.29 Over half of the interviewees (54%) had a secondary purpose of visit – primarily food or non-food shopping or to use service facilities.

3.30 Over a quarter of those in Settle for the purpose (either primary or secondary) of food shopping on the day of the survey were carrying out their main food shop. Most of those with the primary purpose of main food shopping were also in Settle for a secondary purpose – for example, intending to use services, buy food in other shops, buy non-food items or eat and drink in the town centre.

3.31 60% of those carrying out their main food shopping were doing so at the Co-Op in Settle and 12% at Booths, the others merely responding 'local shops'. However, over a third of those not carrying out main food shopping at the time of interview normally do so at Booths, 23% at the Co-Op, 3% at the Spar shop and 24% at Morrisons in Skipton.

3.32 41% of respondents shop at Booths either for main food or top-up purposes, with 32% patronising the Co-Op and 10% the Spar shop. By far the most popular food destination outside Settle for the town's visitors is Morrisons in Skipton.

3.33 Settle is regarded as the major centre for clothing and footwear shopping by 19% of interviewees, which is an acceptable level given the relatively scarcity of retailers of these goods in the town. The most popular shopping destinations other than Settle are Skipton (20%), Leeds (18%) and Lancaster (13%). 8% choose Keighley, 7% Harrogate and 4% Kendal, while a handful patronise Manchester, Blackburn, Carlisle, Colne, Preston, London or Ilkley. 2.5% tend to buy these goods by mail order or via the internet.

3.34 Of those carrying out non-food shopping, some 24% were in Settle to buy toiletries/pharmaceutical products, nearly 20% for clothing or footwear, 12% for DIY/ironmongery goods and 10% for household products.

3.35 The main reason for choosing Settle for shopping is that it is close to home (58.7%%) or close to work (9.3%). Other reasons, cited by fewer interviewees, include:

- the choice/quality of shops;
- the attractiveness of the environment;
- the safe/secure environment;
- the range of services;

- the proximity to family;
- to support local shops;
- child attends local school;
- for a change;
- the choice of places to eat and drink;
- the parking provision;
- its presence of other amenities; and
- the fact that it is relaxing.

3.36 62% of those interviewed intended to spend no longer than an hour in Settle 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 the town centre.

3.37 47% of interviewees visit the town centre in the evenings, mostly to visit the pubs and restaurants. 41% would like to see additional leisure facilities in the town, the most popular being more sports facilities, mentioned by 14%, a cinema (13%), ten-pin bowling (13%) and a skateboard/rollerblade park 9%). Others, each mentioned by just a few, include additional cultural facilities, a better theatre, more health and fitness clubs, more restaurants, an Arts Centre, Bingo, youth clubs and night clubs.

3.38 Interviewees particularly like about Settle town centre – the aspect first mentioned:

- its proximity to home (37%);
- its attractive environment (13%);
- its character/traditional feel (5%);and
- its quietness/peacefulness (5%); and

3.39 Other aspects first mentioned as particular likes by fewer than 5% include the friendly people, the ease of shopping, the ease of access on foot, the choice of shops and the ease of access by car. 65% of the interviewees like more than one particular aspect of the town centre, the top 'second mention' (by over 30%) being the attractiveness of the environment.

3.40 Interviewees particularly dislike (first aspect mentioned):

- nothing (30%);
- traffic congestion (16%);
- lack of choice of shops (8%)
- lack of parking (6%); and
- too few clothes shops (5%);

3.41 Other aspects mentioned as particular dislikes by fewer than 5% include too many empty shops, not enough for local people to do, the poor choice of shops, the fact that prices are high and the poor quality of shops. Just over a third of the interviewees dislike more than one particular aspect of the town centre, the top 'second mention' being lack of clothes shops.

3.42 These responses are encouraging in that so many dislike nothing about the town centre – and so many appreciate the attractiveness of Settle's environment. In several other towns, we have found around half of visitors liking nothing and disliking everything about the centre. However, it is clear that Settle's retail offer is not generally held in high regard, if the interview sample is truly representative of the town's customers. We have no reason to believe that it is not representative, as the sample was a cross-section of the visitors to the town on six separate days and care was taken to ensure that interviewees included an appropriate spread of ages and socio-economic groups.

3.43 Visitors would like to see the following improvements to the shopping facilities in the town centre:

- a wider choice of non-food shops (31%), although in addition, others specified particular types of non-food shops, i.e. clothing (7%); furniture (2%);
- additional multiple traders (17%);
- a wider choice of food shops/more fresh produce shops (14%).
- additional small specialist shops (9%); and
- more/better parking (5%).

3.44 Other improvements, each suggested by only a few, include fewer vacant units, a better traffic system, a pedestrianised area and an internet café.

3.45 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, almost 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 a pleasant town centre environment (just over 61%), followed by safety (just under 61%), maintenance and cleanliness, ease of finding a car space and ease of getting around (all around 55%).

3.46 The one aspect considered unimportant by the majority of interviewees (53%) is the presence value/discount shops – although 13.3% regard these as very important and 32% as important. Other aspects considered relatively unimportant are high quality/exclusive shops (41.3%) and shops related to tourist activity (37.3%).

The Household Survey

3.47 NEMS was also commissioned to undertake an independent survey among 800 residents (all of whom are responsible for carrying out the majority of the shopping in their household) living within the Craven District.

3.48 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.

3.49 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.

3.50 The results of the entire survey are analysed in detail in the Skipton Retail Study, whilst those pertaining to Settle are considered in this report. The survey area was divided into nine zones, each comprising one or more wards, zone 7 being Penyghent, Settle and Ribblebanks. The total population of zone 7, according to the 2001 Census, is 5,532, of whom 5,118 live in households (the remainder residing in communal establishments) - *source*: *Office of National Statistics*.

3.51 The survey area and its zones are displayed on the following page.

3.52 Residents throughout the survey area sometimes visit Settle, for a variety of purposes, the proportion in each zone and the predominantly cited reason being:

	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 & Ribblesbanks**	**Zone 8 Ingleton and Clapham**	**Zone 9 Bentham**
Sometimes Visit	27.5%	16.9%	9.7%	28.4%	17.9%	48.5%	98.7%	65.6%	36.5%
Most Quoted Purpose of Visit	Leisure	Top-up food shopping	Meeting friends	Leisure	Non-food shopping	Top-up food shopping	Main food shopping	Main food shopping	Non-food shopping

3.53 In addition to all forms of shopping, meeting friends and leisure purposes, Settle is visited for:

- Banking/financial services;
- Outdoor activities;
- Work;
- Eating/drinking; and
- The library – although by very few indeed, even in zone 7.

3.54 The survey area is broken down into 9 zones, comprising the following wards.

Zone 1: Cowling(4), Glusburn(8), Sutton-in-Craven(17)

Zone 2: Aire Valley with Lothersdale(1), West Craven(19)

Zone 3: Skipton South(15), Skipton West(16)

Zone 4: Embsay with Eastby(5), SkiptonEast(13), Skipton North(14)

Zone 5: Barden Fell(3), Grassington(7), Upper Wharfedale(18)

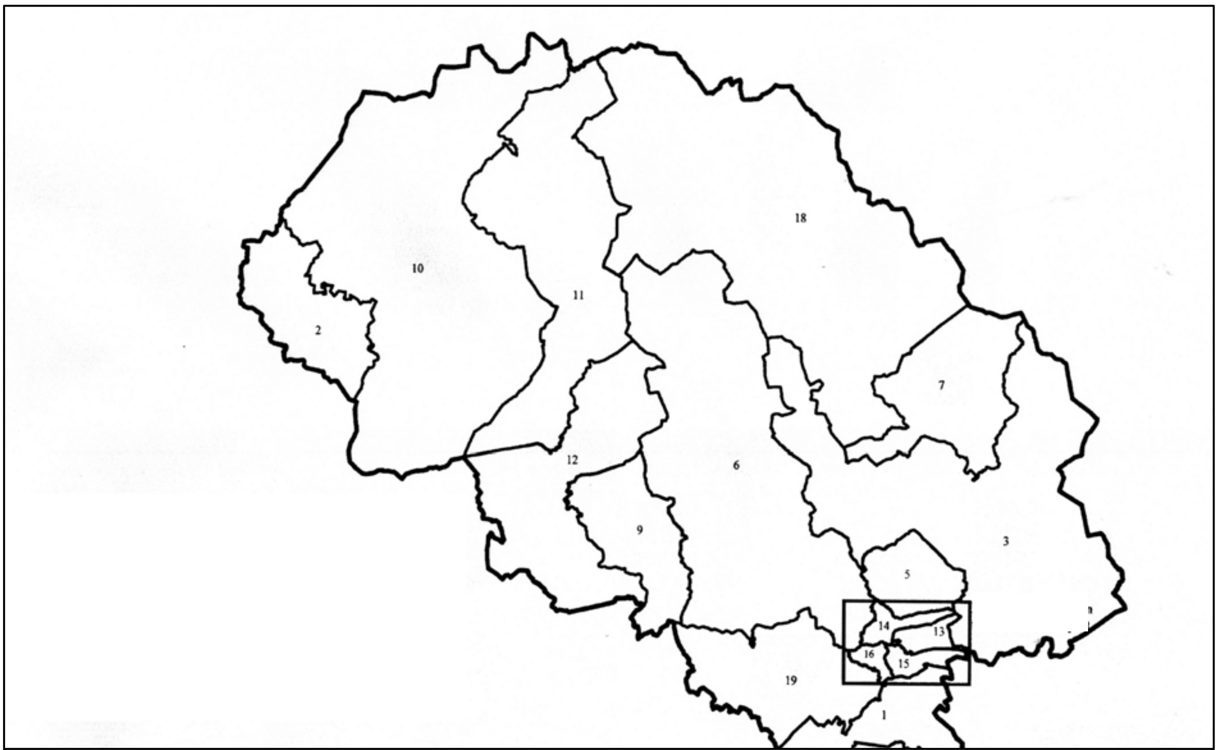
Zone 6: Gargrave and Malhamdale(6), Hellifield and Long Preston(9)

Zone 7: Penyghent(11), Settle and Ribblebanks(12)

Zone 8: Ingleton and Clapham(10)

Zone 9: Bentham(2)

Household Survey Area



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

Zone 1 Wards 4,8 & 17 (Population 9257)
(Cowling (4), Glusburn (8), Sutton-in-Craven (17)

Zone 2 Wards 1 & 19 (Population 5152)
Aire Valley with Lothersdale (1), West Craven (19)

Zone 3 Wards 15 & 16 (Population 7469)
Skipton South (15), Skipton West (16)

Zone 4 Wards 5,13 & 14 (Population 8519)
Embsay with Eastby (5), Skipton East (13), Skipton North (14)

Zone 5 Wards 3, 7 & 18 (Population 5037)
Barden Fell (3), Grassington (7), Upper Wharfedale (18)

Zone 6 Wards 6 & 9 (Population 4643)
Gargrave and Malhamdale (6), Hellifield and Long Preston (9)

Zone 7 Wards 11 & 12 (Population 5118)
Penyghent (11), Settle and Ribblebanks (12)

Zone 8 Ward 10 (Population 3656)
Ingleton and Clapham (10(

Zone 9 Ward 2 (Population 3490)
Bentham (2)

Settle Market

3.55 Residents from every zone patronise Settle Market. Whilst we have no details of the frequency of their visits, the proportion of those who say they do shop at the Market is:

	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 & Ribblesbanks And Ribblebanks	Zone 8 Ingleton and Clapham	Zone 9 Bentham
Do shop at Settle Market	11.5%	6.5%	2.9%	6.8%	5.1%	27.9%	69.6%	40.6%	21.2%

3.56 Consideration is given to the operation of the Market in section 4 of this report.

3.57 Throughout the survey area, the aspects of Settle particularly liked by those who ever visit the town (many mentioning more than one aspect) are:

- its attractive, pleasant environment (43%) ;
- its closeness to home (16%);
- ‘nothing’ (16%);
- good choice of shops (10%);
- the market (8%);
- shops all close together (8%);
- everything (6%);
- friendly/nice people (5%).

20 other aspects are also liked by a small percentage of residents. These include the architecture/heritage of the town, the quality of the shops, the ease of parking and the presence of financial and other services.

3.58 Local residents (those in zone 7) particularly like (again many mentioning more than one aspect):

- its closeness to home (36%);
- its attractive, pleasant environment (33%); and
- ‘nothing’ (23%)

18 other aspects are also liked, each by a small percentage of residents. These include the choice and quality of shops and the fact that they are all close together, the ease of getting around the town and the friendly people.

3.59 Throughout the survey area, the aspects of Settle particularly disliked by those who ever visit the town (many mentioning more than one aspect) are:

- nothing (77%);
- traffic congestion (6%);
- lack of parking (3.5%);

20 other aspects are also liked by a small percentage of residents. These include a poor choice of shops, a lack of clothes shops, the quality of the shops and a perception that Settle is too busy/crowded.

3.60 Local residents (those in zone 7) particularly dislike (again many mentioning more than one aspect):

- 'nothing' (59%);
- traffic congestion (10%); and
- too busy/crowded (6%)

13 other aspects are also disliked, each by a small percentage of residents. These include the range and quality of shops, the lack of parking, too few pubs and restaurants and poor bus services.

3.61 65% of zone 7 residents enjoy leisure activities outside the home, the most popular of which is playing sport, followed by walking. 22 other pursuits are also enjoyed as the main leisure activity outside the home (only one was asked for), each by a small percentage of residents. 71% of these residents participate in their activity in Settle and 14% in various venues at different times. A very small percentage visits each of Skipton, Harrogate, Burnley and Ingleton for main leisure purposes.

3.62 The majority of residents spend very little money on their main leisure activity – 59% spend less than £20 per month, which is not surprising given the predominance of playing sport and walking.

Comparison Shopping

3.63 Leaving aside food shopping, nearly 42% of households in zone 7 regard Settle as their main comparison goods shopping centre. Skipton is second (27%) and Kendal third (13%). Other centres mentioned by just a handful of respondents are Leeds, Keighley, Manchester, Bradford, Burnley and Lancaster.

3.64 7% of those in zone 6 and 5% of those in zone 8 also regard Settle as their main comparison goods shopping centre. Whilst one respondent in zone 4 and another in zone 5 cited Settle in this context, we regard these responses as unrepresentative of the zones as a whole, probably arising from particular circumstances of the individual respondents. We therefore regard zone 7 as Settle's primary comparison catchment area, acknowledging that the town will derive a small proportion of its turnover from residents in the adjoining zones.

3.65 The fact that a centre is regarded as the principal shopping destination by a certain percentage of residents does not necessarily means 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.

3.66 Settle is patronised by a healthy proportion of its catchment population for all comparison shopping and the table below sets out the percentage of residents in zones 6, 7 and 8 who normally shop in the town for different types of goods.

TYPES OF GOODS	ZONE 6	ZONE 7	ZONE 8
Clothing/footwear & fashion goods	1.5%	21.5%	9.4%
CDs, Videos, DVDs, Cards & Gifts	1.5%	27.8%	0.0%
Books & Stationery	7.4%	54.4%	17.2%
Personal Care Goods	7.4%	59.5%	20.3%
Small Electrical Goods	8.8%	63.3%	10.9%
Bulky Household Goods	8.8%	51.9%	7.8%
Other Non-Food Items	7.4%	53.2%	7.8%

3.67 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 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.

3.68 Based on the survey results, 21.5% of zone 7's residents normally buy clothing and footwear in Settle, while 20.3% choose Skipton. Given the relative lack of clothing and footwear in the town, this is an acceptable share of expenditure (and the results tend to confirm the findings of the visitors' s survey). However, as no other single centre appears to act as an overwhelming draw for this area of expenditure, it would seem that new independent fashion/footwear retailers could succeed in the town – provided the range of goods is what is demanded, although it will never compete with higher order destinations.

3.69 Other centres normally patronised by residents for clothing and footwear are:

- Leeds (15.2%)
- Kendal (13.9%)
- Keighley (7.6%)
- Harrogate, Preston, Lancaster, Boundary Mills (Colne), Burnley, Bradford and Manchester (less than 2.5% each).

3.70 Nearly 4% of zone 7's residents normally buy these types of goods by mail order or the internet.

3.71 While just 4.7% of residents in zone 8 regard Settle as their main shopping centre, over 9% of them normally buy clothing and footwear in the town (their other major destinations being Kendal and Lancaster).

3.72 In all sectors, Settle is patronised by a greater proportion of residents in zone 7 than choose to shop elsewhere. Whilst the proportion of those using the town for CDs, Videos etc seems relatively low, no other centre appears to be attracting a major share of the expenditure devoted to such goods. 12.7% of residents claim not to buy these types of goods and a further 7.8% buy them by mail order or the Internet. The remaining expenditure in this sector is distributed amongst:

- Skipton (13.9%)
- Kendal (11.4%)
- Leeds (6.3%)
- Keighley (5.1%)
- Burnley, Bradford, Harrogate (each 2.5% or less)

3.73 This is a sector where we would expect Settle to retain a much higher share of expenditure and indicates that provision/range of goods in the town is relatively poor.

3.74 Settle is performing relatively well for a town of its size in all the other sectors, retaining over 50% of expenditure in zone 7 – and particularly well in small electrical goods, due no doubt to the presence of the well established and highly regarded Garnett shop in Market Place.

3.75 The Office for National Statistics produces annually the UK National Accounts – The Blue Book, which contains detailed estimates (amongst other data) of national retail expenditure by households across all sectors of goods. Specialist retail analysts such as MapInfo and CACI provide local expenditure estimates by distilling this information to reflect the socio-economic characteristics of any defined area. We have obtained local expenditure estimates for the Craven District from CACI Limited.

3.76 The 2003 estimates for Craven (the latest available) records that average expenditure in the District on comparison goods is £2,000 per person per annum, after adjustment for special forms of trading (mail order, party plan, vending machines, markets and other non-store activity). We have adopted the District expenditure data throughout the survey area and have applied this per capita sum to the population living in households in zone 7 as at the 2001 Census (5,118). Thus the comparison goods expenditure generated in zone 7 is currently around £10.24M (5,118 @ £2,000 per head). Comparison expenditure is forecast to increase in the ultra long term by about 3.7% per annum (and by significantly higher percentages in the shorter term), although the rate of increase will differ across the goods sectors.

3.77 Based on the survey results, Settle is currently retaining some £4.24M of that expenditure or achieving a market share in its primary catchment area of 41.4%. In addition, the town is achieving some £1.07M of the expenditure generated in zones 6 and 8, together with additional expenditure generated from tourism and other shoppers who do not live in the immediate area.

Convenience Shopping

3.78 The following table sets out where residents in zone 6, 7 and 8 carry out their main food/grocery shopping. Once again, Zones 6 and 8 have been included, as a significant proportion (particularly within zone 8) of their residents patronise Settle for main food shopping. A handful of residents in other zones also carry out main food shopping in the town, but as in the case of comparison shopping, we regard these responses as unrepresentative of the zones as a whole, probably arising from particular circumstances of the individual respondents. The vast majority of shoppers in the UK carry out their main food visits close to home or work, although some will travel a little further out of loyalty to a particular operator or if local provision is unsatisfactory. We therefore believe it realistic to treat Settle's primary convenience catchment area as zone 7, acknowledging that the town will derive a proportion of its main food turnover from residents in the adjoining zones.

USUAL DESTINATION FOR MAIN FOOD SHOPPING	ZONE 6 %	ZONE 7 %	ZONE 8 %
Settle			
Booths	7.4	51.9	21.9
Co-Op	0.0	5.1	3.1
Total Settle	**7.4**	**57.0**	**25.0**
Skipton	80.8	25.3	14.1
Ingleton	0.0	0.0	9.4
Other Areas			
Kendal	0.0	3.8	23.4
Keighley	3.0	3.8	0.0
Colne	1.5	2.5	1.6
Other towns	7.4	3.8	25.1
Internet/Delivered	0.0	3.8	1.6

3.79 Settle retains 57% of the main food convenience expenditure generated within its primary catchment area. It is clear that the opening of the Booths supermarket has made a tremendous difference in Settle and, whilst probably impacting to a certain extent (as far as main food shopping is concerned) upon the Co-Op, it has 'clawed back' convenience expenditure previously leaking out of the town to other areas. It is unlikely that market share in the primary catchment area will increase a great deal beyond this level in the foreseeable future, given the fact that Booths is regarded as one of the more expensive supermarket operators and that there is considerable customer loyalty to Morrisons in Skipton (which currently captures over 15% of the zone 7 main food expenditure).

3.80 Settle also retains a highly significant 25% of main food expenditure generated in zone 8 (Ingleton and Clapham), reflecting the lack of large, modern convenience provision in the adjoining zone.

3.81 It should be noted that a later question asked respondents for what purposes they visit Settle and many more from other zones say they come sometimes for main food shopping (including 24.2% from zone 6 and 14.3% from zone 5. This is an expected response, particularly when Settle has a store (Booths) regarded by many as a destination for occasional special food buying visits. In a similar way, many of those in zones 6, 7 and 8 who normally carry out their main food shopping in Settle, will sometimes do so elsewhere. The continuation of these occasional main shop visits from other zones will largely depend on whether any new, equally attractive, stores are developed elsewhere.

3.82 39% of those carrying out their main food shopping in Settle link their trip with some other purpose. Over half of them do other food shopping in other shops, do non-food shopping and visit the bank or post office. Nearly 40% engage in some form of leisure activity, primarily eating or drinking, when in town to do their main food shop..

3.83 Respondents were asked in which towns they 'normally' carry out top-up shopping, the results being set out in the table below.

USUAL DESTINATION FOR TOP UP FOOD SHOPPING	ZONE 6 %	ZONE 7 %	ZONE 8 %
Settle	13.2%	62.1%	9.4%
Skipton	58.8%	3.8%	3.1%
Ingleton	1.5%	0.0%	46.9%
Elsewhere	10.4%	2.6%	14.1%
Don't do top-up	16.2%	27.8%	20.3%
Don't know	0.0%	3.8%	6.3%

3.84 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 zone 7 is currently around £7.74M.

3.85 Based on the survey results, Settle is currently retaining some £4.59M of that expenditure or achieving a market share in its primary catchment area of 59.3%. In addition, the town is achieving some £1.83M of the convenience goods expenditure generated in zones 6 and 8.

3.86 The survey does not, of course, take into account the expenditure in Settle by tourists or others who live outside the study area, whose contribution in many towns is essential to their survival. Given the nature of many of the shops in Settle, and taking into account some of the responses to the Retailer and Business survey, we estimate that the town benefits from a substantial additional expenditure, both in comparison and convenience goods, from outside its primary and secondary catchment areas.

3.87 Indeed, the town has to continue to capture such inflows of expenditure as a resident population of 5,118 is simply insufficient to support the existing convenience floorspace, even if it was retaining 100% of expenditure generated in the primary catchment area. Whilst this size of population might, technically, be sufficient to support the existing comparison floorspace if it captured the majority of expenditure generated in the primary catchment area, in reality consumer habits mean that the comparison goods turnover too, needs to continue to rely upon inflows of expenditure from elsewhere.

3.88 Some of this inflow is of course from the adjoining zones where retail provision is limited and Settle is likely to continue to be patronised by residents of these areas unless they find a better or more convenient offer elsewhere. The presence of Giggleswick School should provide an additional source of expenditure in Settle, both from staff and pupils (who are something of a captive audience during term times) and from parents visiting or collecting their children, many of whom travel considerable distances and would probably not visit the town frequently (or at all) were it not for the school. The fact that a large proportion of the pupils board at the school means that they and the resident staff are more likely to spend a higher proportion of their money locally than those who return home at the end of the day. It is nevertheless likely that pupils (and parents) and staff of Settle High School will also bring additional expenditure into the town, particularly as the school draws its pupils from an area of nearly 200 square miles (according to the Ofsted Report of 2002.

3.89 Other sources of expenditure are those who work but do not live in the local area, which would not appear to be many, and those who may be described as tourists – whether they are day visitors from the wider region or short or long-stay visitors from elsewhere.

3.90 However, tourism spend is a discretionary activity, subject to external influences to a far greater degree than expenditure by the resident catchment population. Tourism in Settle is considered in greater detail later in this report.

4 The Health Check

Diversity of Uses

4.1 A successful centre provides its visitors with a wide range of activities in terms of shopping, services, leisure, community and cultural facilities and one of the key indicators of vitality and viability is the diversity of uses present. The distribution of uses within Settle's effective retail area (which extends beyond the defined principal shopping centre, but does not cover the entirety of the "Fringe Commercial Areas") is displayed on the plan following this section. It can be seen that Settle is marginally swayed towards comparison retail although there is a relatively even split between comparison (45.10%) and service (40.20%).

	No. Of Units	% Total
Convenience	11	10.78%
Comparison	46	45.10%
Service	41	40.20%
Vacant	3	2.94%
Miscellaneous	1	1%
Total	**102**	100%

4.2 In addition to the pure retail offer, considered in more detail below, Settle provides a number of services and other facilities including a Public Library in the High Street, a veterinary centre, two Dentists (Station Road), a Chiropodist in Cammock Lane, and a Doctor's Surgery atTown Head.

4.3 Settle houses a range of professional and commercial businesses including architects, accountants, solicitors, estate agents, surveyors, designers and printers. Financial services in the town are represented by the Post Office in Duke Street and four 'High Street' Banks: HSBC, Barclays, Lloyds TSB and Nat West. Other non food and drink services in Settle include a dressmaker, barber, and hair and beauty salons.

4.4 There are a number of pubs and hotels with public bar and dining facilities in Settle, the most central of which are the Royal Oak Hotel opposite the Market Place and the Golden Lion Hotel nearby in Duke Street. Close to the town centre on the Skipton Road is Falcon Manor, an imposing listed country house hotel, a popular venue for civil weddings, functions and conferences as well as for private dining and short breaks.

4.5 The provision of restaurants within Settle is somewhat limited relative to its size. Perhaps two most notable are Little House in Duke Street and Ruchee Indian Restaurant in Commercial Yard off Duke Street. Whilst the Ruchee Restaurant looks intriguing, it is somewhat tucked away and would perhaps go unnoticed by tourists unless they park in the pay and display car park to the rear of the restaurant. Others include Ravenous and Royal Spice in Market Place, along with a Chinese Takeaway, China China in Church Street. Additionally there are two fish and chip shops, one located within The Shambles offering a restaurant option and a takeaway towards the upper end of Church Street.

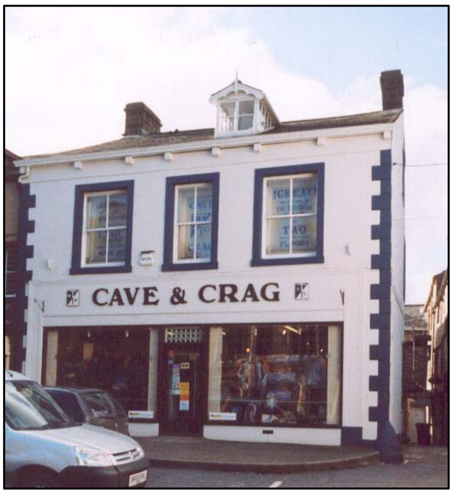
4.6 Also of note is the Ye Olde Naked Man Café which also offers home baked produce. It occupies a prime position in the Market Square, and is popular with both local people and tourists.

4.7 Settle's attractions may be split between those primarily of interest to tourists which is covered in more detail later on in this report, and those primarily of interest to local residents. Facilities which are perhaps of more interest to local residents include a Swimming Pool located on Kendal Road, the Victoria Hall which offers both Theatre and Cinema, the Market which is held on Tuesdays, again covered in more detail later in the report (but which attracts patronage from a wide area), a Golf Club, Cricket Club and Rugby Club. All of these attractions are key to a small community such as Settle where access to larger towns with more commercial venues can be difficult.

The Victoria Hall

Mary Milnthorpe and Daughters (left)

Cave and Crag (right)



Retailer Representation

4.8 Settle is made up predominately of small independent retailers with a bias towards quality niche market goods, including Mary Milnthorpe and Daughters which specialises in antique jewellery and silver, and has been established for a considerable time in the town. The business has been handed down through the generations to Judith Milnthorpe, the current proprietor who is the great grand-daughter of the original founder. This business, together with Settle's other specialist antique shops, attracts customers from a very wide area.

4.9 Other key retail attractions are aimed at the tourism market, in particular Castleberg Sports and Cave and Crag. These two shops are a key indicator of how much tourism expenditure contributes to the health and vitality of the town, given that two relatively large outdoor shops, whilst in direct competition, are able to operate successfully within the prime retail area. These shops offer a range of products from general leisurewear through to more specialist climbing, walking and camping equipment.

4.10 There are also shops which offer good quality products aimed at local people including Dugdales, a hardware store displaying an impressively wide range. In larger towns independent hardware stores of this quality are less common, as they are unable to compete with the nationwide operators such as B & Q and Homebase. From Settle, the nearest large multiple DIY store is Focus in Skipton.

4.11 J W Garnett (Electrical), another high quality independent retailer, located in Market Place, offers traditional electrical goods at reasonable prices. Here again, such stores struggle to compete with a larger multiple in bigger towns. Also in this sector is Harrison & Cross which, whilst being located on the Sidings Industrial Estate, has a domestic appliance showroom with a broad range of stock.

4.12 Other comparison goods found in Settle include toiletries/pharmaceutical supplies, flowers, plants, needlework and craft supplies, furniture, floor coverings, books, pictures, soft furnishings, teddy bears, cards, gifts, car and kitchen accessories. There is, however, a relatively poor provision of CDs/DVDs/Videos and records.

4.13 The clothing and footwear sector is somewhat limited, as there are no dedicated mens or childrenswear shops in the town centre and very few specialising in ladieswear – Fredas Fashions, Jumper (one of the few national multiple comparison retailers in the town) and Helen Marie – a specialist lingerie retailer. Settle also has a dress agency and a handful of other shops which retail a limited amount of clothing in addition to their primary offer (e.g. Car and Kitchen). There is, however, an excellent range of outdoor/country clothing and footwear. The town centre has two shoe shops, one of which is now concentrating on shoe manufacture, rather than retail.

4.14 A short journey out of the town centre, off the B6479, is Watershed Mill, a visitor centre converted from an early 19th century cotton mill which contains a number of independent and multiple retail outlets, including Edinburgh Woollen Mill, Dalesmade Centre, The Rock and Fossil Shop, a Golf Centre and the Yorkshire Ale shop.

4.15 In the convenience sector, the addition of Booths Supermarket has made a valued improvement to Settle's food offer and sets a fine example of excellent customer service. The building alone is a striking and contemporary piece of architecture which sits well on the edge of centre site. From the household survey, we deduce that whilst only 7.5% of households within the Craven District patronise the Settle Booths for their main food shop, an impressive 51.9% of people within the Penyghent and Settle and Ribblebanks wards choose the store for this purpose. As pointed out in section 3, Booths is also used for main food shopping by nearly 22% of households in Ingleton and Clapham ward, as well as over 7% of those in the survey zone 6, particularly attracting shoppers from Hellifield and Long Preston Ward. The Co-op in the Market Square was the town's main supermarket before Booths, but now it appears to be used more for top-up purposes, although our household survey found that some 7% of households in the Penyghent and Settle and Ribblebanks wards use the store for their main food shopping.

4.16 The linkages between Booths and the traditional town centre are not ideal, but there is clearly little scope for improvement and the survey indicated a relatively high level of linked trips carried out by those shopping at the store. Settle has two convenience stores - Spar, at the corner of Cheapside and Duke Street, facing the town hall and a small Co-op located within the petrol station. We consider that, in a town as small as Settle, the filling station and express store may be detrimental, encouraging customers to combine their fuel and top-up food buying and then leave, rather than spending time in the town centre, potentially patronising a variety of shops.

4.17 Also within the convenience sector are a number of specialist independent food retailers, including two newsagents, three bakers and a butcher, Country Delights, which offers a range of preserves and health foods (and also houses an alternative therapy centre), Dukes of Settle (wine, spirits and beer merchants) and Daisy Fresh, the Italian Delicatessen in High Street, which offers a wide range of specialist food products. (see below)

Good Quality Independent Deli

4.18 Settle is too small to attract most multiple retailers and, in any case, customers of the multiples are generally attracted to larger centres where they are able to compare items in several shops on the same trip.

4.19 Furthermore, a large part of Settle's 'local distinctiveness' is based on the fact that it is not full of the same high street multiple operators that one can find in the majority of our towns and cities. On the contrary, the retail offer is predominantly independent and the town boasts many long-established family run businesses. Many of the respondents to our retailer and business questionnaire recognise the vital contribution to Settle made by such businesses and are proud that Settle is so different from other towns of a similar size.

4.20 A town full of independent retail businesses does not suit all consumers. Most markedly in the fashion sector, the young, trendy shoppers (18 – 25) who spend most of their disposable income on the latest fashion 'must-haves' want to browse round a large centre going from Republic to Miss Selfridge to Pilot, Monsoon, Oasis, Eisenegger, Hennes, Zara and all the other favourites. They want their clothes to be instantly recognisable by their friends and would not consider patronising the same establishments as their mothers! This is, of course, a vast generalisation but nevertheless portrays the attitude of a large group of today's shoppers. (A study carried out by UMIST last year labelled this group 'Recreational Brand Freaks' and found that it comprised the largest proportion of all the categories of young shopper identified in the research).

4.21 Thus, even if new independent clothing/footwear retailers come to Settle, they are unlikely to attract the majority of the younger age group. They are, however, likely to attract the older discerning customer and particularly the archetypal tourist, provided that:

- the stock has been selected wisely and displayed attractively,
- goods are appropriately priced;

- the shop is well decorated internally and externally, with an appealing fascia and signage and appears inviting;
- service is friendly, helpful and knowledgeable without being overbearing; and
- adequate promotion and marketing is undertaken.

4.22 However, times are not easy for small businesses and many new retail ventures fail. Major landlords are nervous about letting shop units to untested rental covenants, although private property owners, particularly those with an affinity to the locality, may well take a different view.

4.23 Even if a fledgling retailer is able to secure premises, obtaining credit from wholesalers is notoriously difficult for someone with no track record, so a large amount of capital may be required before a single sale is achieved and most businesses take at least two years to establish themselves. Many new ventures fail because they are grossly under-capitalised or have been founded on over ambitious business plans. Even where progress is being made in accordance with a business plan and targets are being met, an unforeseen problem may arise (FMD, a fuel crisis, family illness etc) which can affect the small business – particularly in rural areas - so disastrously as to cause its closure. Most multiple retailers are able to withstand such set-backs because of the cushioning effect of other branches relatively unaffected by such problems or their status with the banking industry.

4.24 Many small independent retailers experience other problems too. If the business is too small to support a manager or several staff (as many are), the proprietor has to work extremely hard. There are increasing pressures for Sunday opening, particularly in tourist areas, and the virtual disappearance of the traditional mid-week closing day means that many retailers are working six or seven days per week and finding it impossible to take holidays, or even to take the time off to source new and interesting stock. Quality of life for these retailers may diminish to such an extent that they simply do not wish to remain in business. Many who have overcome such problems and have built up a loyal customer base and a successful business over several years find that, when it comes to their retirement, unless there is a family member waiting to take over, it is extremely difficult to find a buyer.

4.25 Long established businesses close and premises lie empty or are occupied by uses which may do nothing to enhance the vitality and viability of the town centre. In many towns, more and more former retail units are occupied by service uses – hot food takeaways, tanning studios, estate agents etc. Whilst the presence of a range of these services is beneficial, their proliferation can lead to the decline of the role of a town as a shopping centre, because there comes a point when there is an insufficient critical mass of retail units to continue to attract the necessary numbers of customers to ensure their survival.

4.26 Any new business would take courage and require time to become established, but there are many successful examples, both in Settle itself and in even small towns elsewhere – for example, Ahernes in Hellifield, Robert Bunney in Grassington, Crofts in Helmsley.

4.27 Finding new independent retailers is no easy matter – they tend to seek out landlords and property agents who are of course unaware of their existence and have been unable to ‘target them’ as occupiers. If a landlord or developer wishes to target a particular high street retailer, there is an estates department or retained agent to whom proposals may be put, but this is not so easy in the independent sector. The proprietor of an existing successful independent business could be approached to see if he/she might be interested in opening up a new outlet or a landlord could advertise locally for prospective retailers to come forward, but the latter in particular is an unlikely scenario in the commercial world. Landlords require certainty of income from their property and to deliberately seek out an untried tenant who may not be able to pay the rent within a few months demands an incredible leap of faith.

Renaissance Market Towns Initiative

4.28 Donaldsons have met with Insight O2 Limited who are acting on the visioning of 4 projects as part of the Renaissance Market Towns process in Settle. These are as follows:-

- The Town Hall
- Market Square
- Victoria Hall and land to the rear.
- Police station

The Town Hall and Market Square can be considered as one project, and has the aim of refurbishing the town hall and improving the access and orientation by providing a new main entrance to Church Street.

4.29 The initial proposals for the Market Square would incur considerable costs in creating new levels, but could create a high quality piece of public realm, whilst also bringing more order to the market, reducing the conflicts which exist between vehicles and pedestrians.

4.30 We understand that the Victoria Hall project is considering the possibility of providing conference facilities, a café bistro and small offices to the rear of the building.

4.31 The Police station is considered to be under-utilised, and opportunities present themselves to rationalise the police space whilst refurbishing the building to provide for other uses which at the time of our discussions were centred around the creation of a community hub. The proposals include Library facilities, a Registrar, and access to Business Support, along with some business incubation space. Whilst this would seem a fine opportunity to provide new community facilities, we understand that no decision has yet been made on whether, or when, the Police Station will be partially vacated.

Creative Rural Enterprises

4.32 In addition to the Renaissance Market Towns projects, Creative Rural Enterprises have recently appointed a business liaison team as part of a two year strategy to market Settle as a place in which people can live, work and play. Rebecca Roberts heads the new team.

4.33 In a recent press article, Rebecca Roberts is quoted as follows:-

"Settle has a tremendous amount going for it and our aim is to actively develop and promote the brand and the assets of the area to new industries, such as manufacturing and technology-based businesses." The project will also seek to link closely with the Renaissance Market Town team and help them to achieve their objectives.

4.34 Tony Price, chairman of CRE, said that one of the key aspects of the new project is to promote the many resources of the region to new start-up businesses and to those wishing to relocate. "New businesses provide different employment opportunities to those traditionally found in rural areas, where tourism is usually the key employer. We want to start seeing 'high tech' industries and manufacturing businesses coming to the area, offering our young people new kinds of jobs and exciting futures. And by widening the business base, new people will move into the area, resulting in a changing visitor profile and an increase in visitor spending as well as improved amenities and facilities - to the benefit of all."

4.35 The article concluded that “Plans are already underway for a series of events with inspiring speakers open to all businesses in the region, with special concessions for Chamber members. Marketing and training events to promote local food producers and products are also being arranged, such as the Sophie Grigson dinner on February 28th. The Settle website, www.settle.org.uk is currently being updated to promote the region as a good place from which to run a business. The business liaison officer and her team have been situated in Settle Town Hall since 1st March 2004, providing a strong and accessible local communication link for all businesses”.

4.36 With Rebecca and assistant now in place, we consider that this project is a valuable initiative and should prove an asset in the future promotion of the business community, which can only enhance the vitality, viability and sustainability of Settle.

Settle Market

Source NTL World.com

4.37 Settle has a traditional market which is held every Tuesday. Like Skipton market, it is popular both with local people and tourists alike, and brings visitors by coach from all over Northern England. The web site Settle.org states that "Held in the Market Square, overlooked by the historic buildings of the Shambles and the Town Hall, Settle Market has not lost its sense of history or tradition". This is a fair representation of the image of the market although, as with many traditional markets, we have concerns that the overall quality of products offered is deteriorating in terms of the number of stalls offering discount goods. Furthermore, the stationing of vans full of stock in the centre of the market detracts from the attractiveness of the traditional market stalls. This said, the market is generally busy and appears to trade well and our household survey found that it attracts residents (in varying proportions) from all over the Craven District.

Tourism

4.38 Settle is a key tourism location. There are a number of important attractions near to the centre which contribute to the appeal of the town as a tourism destination. The centre provides useful amenities and shops for outdoor pursuits enthusiasts using Settle as a base to explore The Dales. These activities include walking, climbing, pot holing, cycling and fishing. There is also an indoor swimming pool and a nine-hole golf course which welcomes visitors.

Settle also provides a good base for an attempt on the Three Peaks Challenge, a 37 km (23 mile) walk taking in the famous peaks of Whernside, Ingleborough and Pen-Y-Ghent.

The famous Settle-Carlisle Railway is popular with families, railway enthusiasts and lovers of breathtaking scenery and boasts 116km(72 miles) of track, 20 major viaducts and 14 tunnels. Watershed Mill, mentioned earlier, houses a visitor centre and boasts an extensive programme of events from exhibitions to fun days.

4.39 Research undertaken by Donaldsons and others has clearly demonstrated that tourism and retail activity are inextricably linked, with a large majority of tourists combining shopping with visiting attractions or simply spending time in the beautiful parts of the country such as the Yorkshire Dales. Tourists have time to browse and, being at leisure, are likely to spend money if they find goods which appeal. 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.

4.40 We believe from our research that many of Settle's businesses are sustained by the tourism spend and it is therefore vital that the town strives to satisfy its visitors who are ever more sophisticated and demanding and who are faced with more and more choices of destination.

Proportion of Vacant Street Level Property

4.41 At the time of our inspections, there were a total of 4 vacant unit shops within the centre. One of these has recently been let for use as a hardware store, and we understand that the proprietor of the small store opposite and to the rear of "The Shambles" will be relocating to larger premises.

4.42 This low level of vacancies is an indication of the good health of the town centre. It should be noted however, that a number of properties have in recent times been taken out of retail use and converted back to residential use.

Retail Rents

4.43 Whilst we have been unable to uncover any recent transactions, we understand from discussions with agents, and our own knowledge of Settle, that prime rentals are in the region of £215.29 per m² (£20 per sqft ITZA).

4.44 From discussions with Neil Wright – surveyors in Settle - we understand that the Settle Down Café is currently for sale. The property is being offered freehold and includes the café business. The building comprises the café and associated kitchen to the ground floor, along with a four bedroom flat to the upper floors. The asking price is £180,000.

Commercial Yields

4.45 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.

4.46 Commercial funding institutions and investors are likely to view Settle as a secondary / tertiary location in which to invest given the lack of multiple traders. Demand for investment property is more likely to come from local entrepreneurs who can afford to speculate on smaller lot sizes.

4.47 We have been unable to reveal any direct comparable evidence in respect of yields, although we would anticipate a wide range of between 9% and 13% depending on covenant strength, length of lease and the condition of property.

Pedestrian Flows

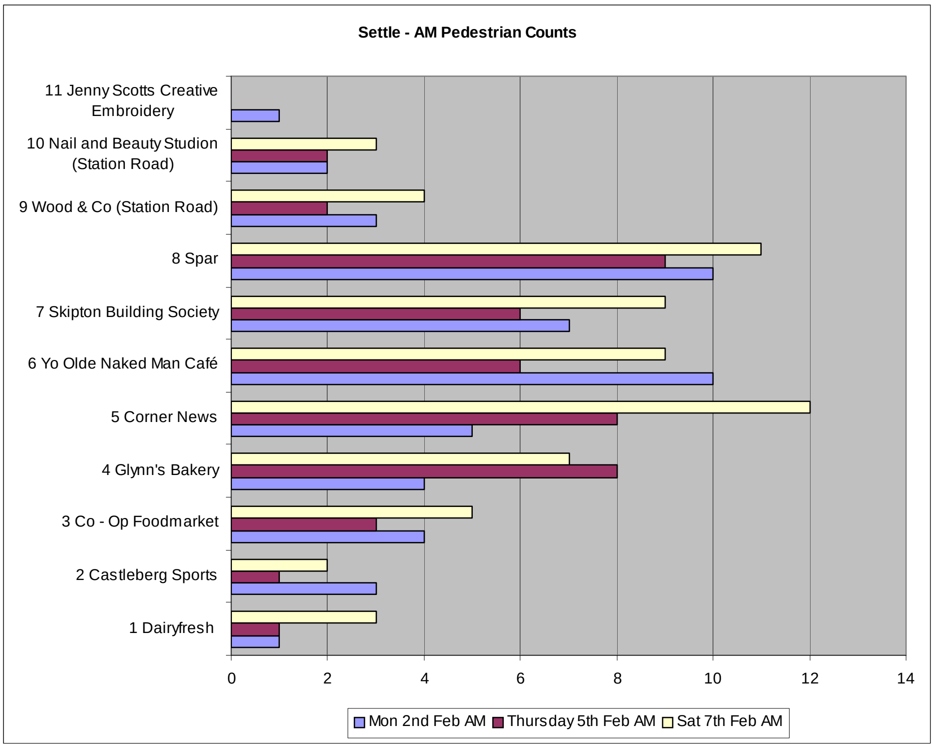
4.48 The pedestrian counts in Settle were conducted using the following method.

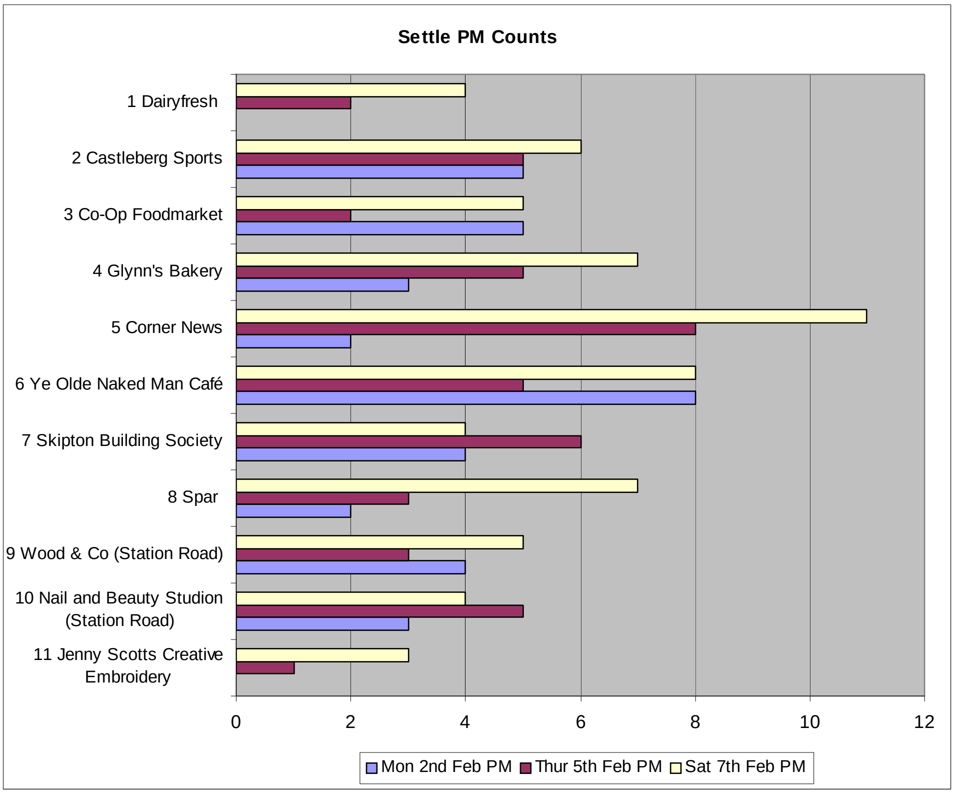
4.49 The counter was assigned a pre-defined route with specific locations at which to stop. At each of the points, the number of people passing left to right within the allocated 5 minute time slot was recorded. The route was then covered in reverse following the same method and again counting those passing from left to right.

4.50 Donaldsons have presented these counts in a graphical format below. We have grouped the counts into morning and afternoon across the three survey days. This enables us to consider which areas of the centre achieve the most footfall, at what time of day and on what day of the week. There are clear patterns identified:-

4.51 It is clear from the graph that the highest footfall in the centre is concentrated between the Spar shop and Glynn's Bakery, particularly in the morning, with the highest concentration, unsurprisingly, on a Saturday morning.

4.52 In general, the afternoon counts show lower levels of footfall although, interestingly, whilst both Castleberg sports and the Co-Op receive a relatively low count in the mornings, they both show higher concentrations of footfall in the afternoon.





Accessibility

Road

4.53 Settle is located just off the A65 on the B6480 approximately 25 kilometres (16 miles) to the north west of Skipton on the edge of the Yorkshire Dales National Park. The A65 is the main road link through the Dales and provides good access to Leeds to the south east, and through to the M6 at Lancaster via the A653.

Rail

4.54 Rail access is afforded by the Settle Carlisle line, which is the main link through the Dales, and popular with both tourists and commuters, providing a convenient link to Leeds central station. From Settle, one can also travel directly to Glasgow, Bradford and York as well as some sixteen destinations between Leeds and Carlisle. Access to the Manchester conurbation is more problematic with multiple changes required.

Bus

4.55 There are regular bus services throughout the Dales linking into key areas such as Skipton. In addition there is the well known Dales bus which operates during the tourist season to carry walkers and cyclists to and from their chosen leisure destination.

The Dales Bike Bus (left) and Settle Station (Right)
Source: Settle.org

Car Parking

4.56 The provision of car parking in Settle is considered adequate. There is, however, a lack of adequate signage to some of the car parks; in particular, the car park to the rear of the Rugby ground is easily missed. The signpost is positioned hard up against the end wall of the Spar shop, and essentially blends in to the wall. Further commentary on the quality and positioning of signage is included within the section on Town Centre Environmental Quality at 4.64.

4.57 The ability to park for short periods on the Market Place on non-market days is regarded by many as advantageous to local businesses, although it has the effect of increasing pedestrian/traffic conflict. However, parking takes place in a haphazard, unmanaged fashion and we have witnessed cars left for many hours without penalty despite the signage indicating short stay only. If this were managed better, it would be easier for people to make short stay trips during the week.

4.58 The development of Booths supermarket has provided additional car parking, which may also be used by those visiting the town centre.

Customer Views and Behaviour

4.59 Our street survey has identified that Settle is patronised by shoppers, not only from the local area, but also from all over the country. Whilst the predominant reason for shopping in Settle is its proximity to home (for local residents), other visitors choose to come for a variety of reasons: for example, the choice/quality of shops, the attractiveness of the environment and the feeling of safety.

4.60 The majority of visitors tend not to spend a long time in the town centre (62% remaining for up to an hour and only 10% for three hours or more), which is not surprising given its size. Nearly half of day-time visitors also patronise the town centre in the evenings, mostly to visit pubs and restaurants.

4.61 Our household survey has identified that Settle's primary catchment area for both convenience and comparison goods is the Settle and Ribblesbank and Penyghent wards, comprising a population in households of 5,118 as at the 2001 Census. The town's secondary catchment area covers the wards of Gargrave and Malhamdale, Hellifield and Long Preston, and Ingleton and Clapham.

4.62 Within the primary catchment area, nearly 42% of residents regard Settle as their main comparison goods shopping centre. This is confirmed by looking at shopping patterns which indicate that Settle is achieving a market share of just over 41% of comparison expenditure, indicating a leakage out of the area of some £6M. Settle also achieves a market share of some 11.5% of the comparison expenditure generated in survey zone 6 (Gargrave and Malhamdale and Hellifield and Long Preston) and just over 8% of that generated in zone 8 (Ingleton and Clapham).

4.63 Settle achieves a market share of around 59% of convenience expenditure within its primary catchment area, indicating a leakage of some £3.15M. Settle also achieves a market share of some 9.5% of the comparison expenditure generated in survey zone 6 (Gargrave and Malhamdale and Hellifield and Long Preston) and around 20% of that generated in zone 8 (Ingleton and Clapham).

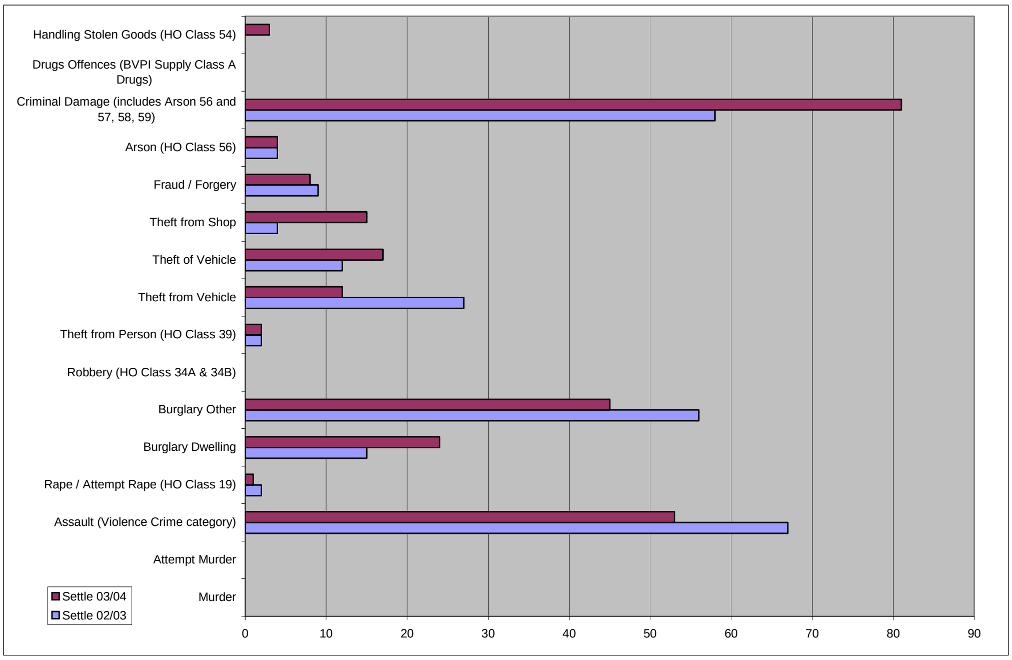
4.64 Customers particularly like Settle's attractive, pleasant environment, as well as its convenient location and choice of shops.

4.65 Very few customers are able to find anything to dislike about Settle – the top response in our Household Survey (given by 77% of those who ever visit the town) was 'nothing' - which is extremely encouraging. Heading the list of dislikes (mentioned by just 6% of the Household Survey sample) is traffic congestion, followed by lack of parking (3.5%).

4.66 Customers feel that Settle could be best improved by a wider choice of non-food shops – several specify in particular clothing or furniture shops. Other suggestions are for more multiple retailers, more fresh produce shops, additional small specialist shops and more/better parking. Suggestions from a minority include fewer vacant units, a better traffic system, a pedestrianised area and an internet café.

Perception of Safety and Occurrence of Crime

	Settle 02/03	Settle 03/04
Murder	0	0
Attempt Murder	0	0
Assault (Violence Crime category)	67	53
Rape / Attempt Rape (HO Class 19)	2	1
Burglary Dwelling	15	24
Burglary Other	56	45
Robbery (HO Class 34A & 34B)	0	0
Theft from Person (HO Class 39)	2	2
Theft from Vehicle	27	12
Theft of Vehicle	12	17
Theft from Shop	4	15
Fraud / Forgery	9	8
Arson (HO Class 56)	4	4
Criminal Damage (includes Arson 56 and 57, 58, 59)	58	81
Drugs Offences (BVPI Supply Class A Drugs)	0	0
Handling Stolen Goods (HO Class 54)	0	3
TOTAL:	256	265



Source: North Yorkshire Police

4.67 From the figures above, it is clear that there is a very limited amount of crime in Settle when compared to other centres. Criminal damage is the most significant area of crime and one which has risen over the last twelve months by 28%, with a total of 81 recorded incidences. This represents just over 1 incident per week and as criminal damage includes a wide range of activities including relatively minor offences it is not considered a great cause for concern.

4.68 Other “significant” areas are that of burglary with a total of 69 recorded incidences in the last 12 months, and Assault which totalled 53 incidences although this is down by 26%.

4.69 It should be noted that these statistics cover the whole of Settle and not just the town centre.

Town Centre Environmental Quality

4.70 The quality of Settle town centre is exceptional. There is an abundance of attractive buildings set around the traditional Market Square with the backdrop of spectacular scenery which is a major attraction of the town. Perhaps the most stunning example of the town’s architectural merit is The Folly (pictured below). The Folly is a grade 1 listed building which has recently been restored and operated as a museum, including a 5 star apartment!

The Folly, Source: Skipton.org

The traditional market Square and The Shambles (above) The Naked Man Café (right).

4.71 Despite its initial impact, the Town Centre does have its faults and there are relatively simple measures which could be undertaken, both by the local authority, and local businesses to improve on what is already a very pretty centre.

4.72 Within the centre there are a handful of vacant unit shops in a state of disrepair which would benefit from at least external decoration.

4.73 Jumpers (pictured below), only distinguishable by a single "M" and logo on its shop front at the time of our inspections, demonstrates an air of neglect which is not present with the smaller independent retailers. A large multiple should take more pride in its shop format and appearance and set an example for other businesses and not such a poor benchmark as demonstrated here!

Jumper

4.74 The quality of signage is considered poor, when compared to the overall quality of the centre, and also by comparison to other centres such as Ingleton. Whilst there are some good examples (below left), there are some other uncoordinated examples which could be improved. The example (below right) is situated in a prominent position to the front of the Market Square. It is messy and confusing!

Signage –

Scope for Improvement !

4.75 One of the major weaknesses which detracts from the environmental quality of the town is the heavy traffic passing through the centre, particularly the quarry lorries, bringing dust and noise, as well as potential dangers to those crossing the road.

4.76 The public toilets in the car parks are somewhat uninviting and do not provide a pleasant visitor experience – no doubt a regrettable sign of the times that they are of the vandal proof variety.

4.77 The surfacing of the Market Place is of poor quality and, as mentioned earlier, the unmanaged parking on non-market days detracts from the environmental quality of what is basically an extremely attractive focal point. It is, however, somewhat stark and would benefit from soft landscaping – the provision of hanging baskets, planted tubs, seating areas etc. We understand that one of the RMT projects addresses these deficiencies.

4.78 In our opinion, the car park adjacent to the petrol filling station detracts from the overall impact and ambience of the town centre and consideration should be given to its redevelopment. Development of this site would bring two potential benefits. Firstly, it would enable the site to the rear of the Victoria Hall to be better accessed and possibly bought into any proposed scheme. Secondly, if developed appropriately, the site could provide a striking gateway building or buildings at the northern edge of the centre. Given its peripheral location, it is unlikely that retail development would be successful, but we believe that development for residential use, possibly mixed with office accommodation for small to medium enterprises would be suitable. It is important that a sufficient density of residential development is allowed as the higher end values will facilitate the development of any office content.

5 SWOT ANALYSIS

5.1 Our research has enabled us to carry out a SWOT (strengths, weaknesses, opportunities and threats) analysis Settle town centre.

Strengths

- Setting/backdrop
- Heritage, attractive historic buildings
- Geographical location
- High quality independent retailers, offering a wide range of goods
- Wide range of services
- Presence of highly regarded, modern supermarket
- Centre for tourism
- Compact, level, easy to get around (apart from crossing the road)
- Accessibility by road and rail
- The Market Place
- Settle Market
- The people – friendly, personal service, sense of community

Weaknesses

- Heavy lorries and other traffic causing congestion through the town centre
- Haphazard, unmanaged parking in the Market Place
- Poorly surfaced Market Place
- Poor linkage between Booths supermarket and the town centre
- A minority of poorly maintained properties, some in prominent locations
- Some unsightly and cluttered/confusing signposts
- Lack of public seating
- Poor orientation of Town Hall
- Limited retail provision in clothing and CD/DVD/Video sectors

Opportunities

- Marketing through CRE, to increase patronage of town centre
- Renaissance Market Town status
- Environmental improvements to Market Place
- Victoria Hall project
- Police Station project
- Refurbishment of vacant and neglected buildings
- Joint marketing with existing attractions in the wider area
- Farmers markets

Threats

- External influences damaging tourist trade
- Complacency – failure to meet demands of modern shoppers/ visitors
- Doing nothing
- Decline of retail provision following retirement of existing independent traders
- Inappropriate development
- Increase in traffic, damaging environmental quality and deterring visitors

6 Conclusions and Recommendations

Source NTL World.com

6.1 Settle is a very attractive town both architecturally and in respect of the stunning scenic backdrop within which it is situated. The combination of these two factors alone make Settle not only a great place to visit, but also a beautiful place in which to live work and play.

6.2 From the viewpoint of a resident, Settle benefits from a wide range of services catering for the community, as well as a retail offer to satisfy day to day needs made up of a number of established independents and commercial multiples such as Booths which provide an excellent range of convenience goods. As may be expected in a small rural town, Settle lacks provision in the fashion sector and its residents will doubtless continue to patronise other centres for higher order purchases. Nevertheless, Settle fulfils the role of a town centre, as defined in PPG6 and the draft PPS6.

6.3 Tourism is a key aspect of Settle, and there are a number of shops providing high quality niche market products such as Mary Milnthorpe, which attracts people to the town from a wide area, and Castleberg Sports / Cave and Crag which serve the leisure market.

6.4 With a few exceptions, the town appears to trade well, but its vitality and viability requires enhancement to ensure its sustainability. It cannot rely solely upon its immediate resident catchment population, but needs to ensure that it continues to capture an increasing amount of expenditure from the wider surrounding area and from tourists/visitors from further afield. The initiatives which are being undertaken in the form of Renaissance Market towns and Creative Rural Enterprises provide a focus for the advancement of the town centre and its businesses.

6.5 The potential environmental improvements, particularly to the Market Place, some of which can be carried out relatively quickly and cheaply, could do much to enhance the attractiveness of the town centre.

Recommendations

6.6 We recommend that:

- environmental improvements are carried out to the Market Square, to improve its attractiveness and its surface;
- measures are put in place to control parking in the Market Square;
- improvements are made to the some of the town's signage – in particular that at the front of the Market Square;
- under the RMT Initiative, consideration is given to the possibility of targeting one or two potential new retailers, who can demonstrate a realistic business plan and who have the vision and creativity to offer something currently unavailable in Settle and which will appeal to a wide range of customers. Support could be given in the form of a subsidised initial rental package, together with business training or support from the CRE;
- If such an initiative is not possible, it is essential that existing retailers strive to respond to changing consumer demands and expectations, in terms of the goods on offer, the way in which they are displayed, the level of customer service and attractiveness/standard of the property itself. Potential customers need to be aware of what is available in the town centre and regular marketing campaigns, preferably in which all retailers take part, can be extremely successful;
- to encourage retailers to improve their offer, the Council consider working with CRE to expand the marketing and training events aimed at promoting local products;
- to heighten awareness of what Settle has to offer, the Council considers the production of an up-to-date shopping guide – perhaps in the form of an attractive leaflet which could be displayed in Tourist Information Centres and hotels throughout the Region;
- the Council investigates the potential to encourage small businesses to improve their performance by adopting modern practices, for example by moving into internet trading. Whilst on the face of it, this may appear to be aimed at reducing visitors and is certainly not suitable for all types of retail, we have found a surprising range of those who have been able to benefit from this type of business, and some who have found that new internet customers or web surfers will come and seek them out – to see for themselves what is on offer. and
- a feasibility be undertaken to consider the viability of redeveloping the car park adjacent to the Shell Garage.

48 Warwick Street, London W1B 5NL
Tel: +44(0)20 7534 5000 Fax: +44(0)20 7434 0045
www.donaldsons.co.uk
enquiries@donaldsons.co.uk

Donaldsons Offices

Birmingham
120 Edmund Street, Birmingham,
B3 2ED
Tel: +44 (0)121 212 1090
Fax: +44 (0)121 212 1099

Cheltenham
Vittoria House, Vittoria Walk, Cheltenham,
GL50 1TW
Tel: +44 (0)1242 521 102
Fax: +44 (0)1242 221 754

Leeds
St Paul's House, 23 Park Square South,
Leeds, LS1 2ND
Tel: +44 (0)113 246 1161
Fax: +44 (0)113 244 1637

Bristol
Beech House, 6 St.Paul's Road, Clifton,
Bristol, BS8 1LT
Tel: +44 (0)117 923 9520
Fax: +44 (0)117 923 9521

Edinburgh
9 Hope Street, Edinburgh,
EH2 4EL
Tel: +44 (0)131 260 7300
Fax: +44 (0)131 225 8970

Manchester
Century House, 11 St.Peter's Square,
Manchester, M2 3DN
Tel: +44 (0)161 237 9977
Fax: +44 (0)161 237 3311

Glasgow
90 St.Vincent Street, Glasgow, G2 5UQ
Tel: +44 (0)141 221 2871
Fax: +44 (0)141 221 1099

In association with
Donaldsons Portugal
Rua São João da Mata 37-39, Piso 1°,
1200 - 846 Lisboa, Portugal
Tel: +35 121 396 3696
Fax: +35 121 396 3703

Appendix 1 – Plan of Settle Retail Area

Appendix 2 - Retailer / Business Questionnaire & Analysis

Appendices

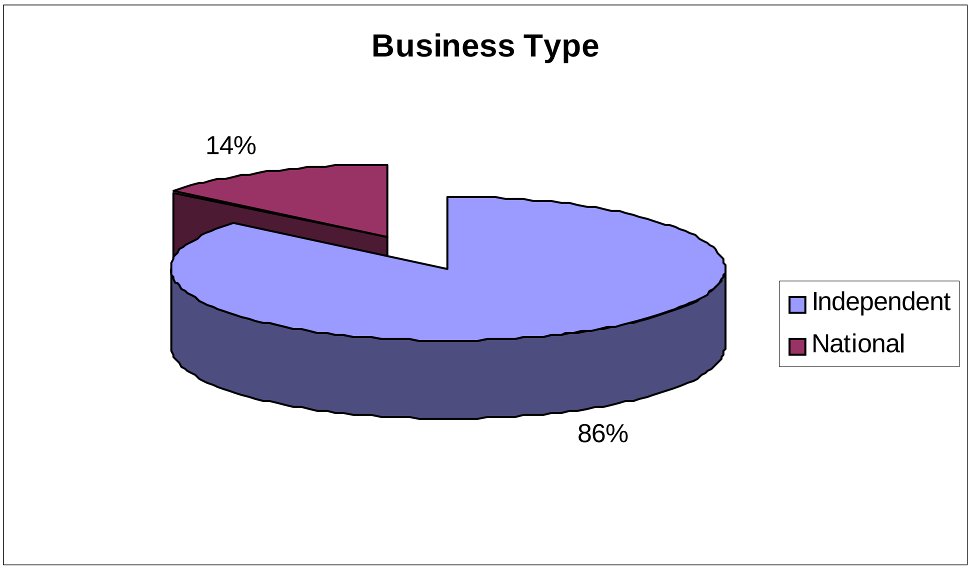
Appendix 1 - Settle Retailer and Business Questionnaire

A retailer and business survey was distributed amongst the retailers and businesses in the town centre to canvas their views on a range of issues affecting the village and area. 28 completed questionnaires were received giving a response rate of 31%.

The results of the analysis of those questionnaires is set out below. Not all respondents answered every question – the analysis excludes any "blanks".

The first three questions concerned details about the respondents (trading name, business address, telephone numbers, goods sold/service offered).

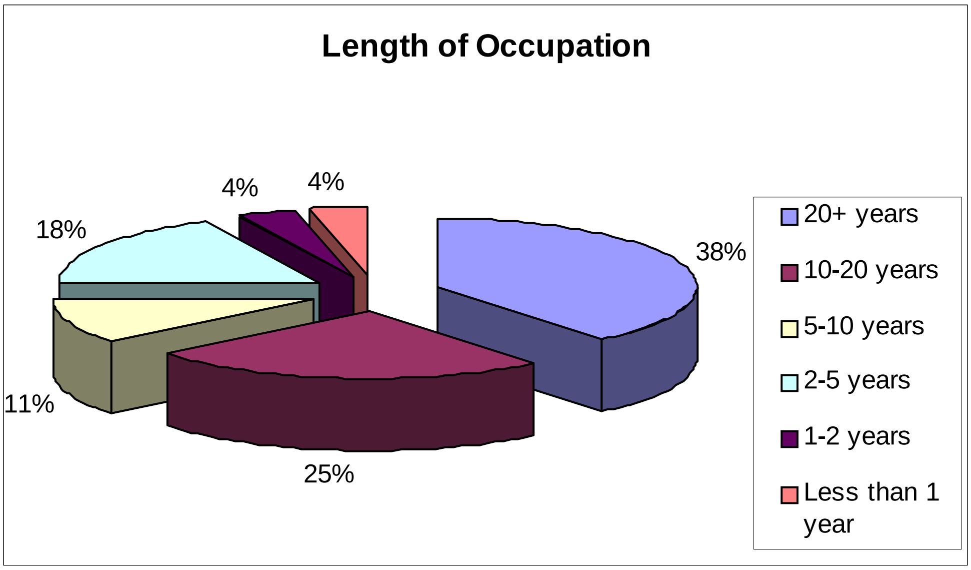
Question 4 - Are you part of a National multiple chain, a franchisee or an independent retailer/business?



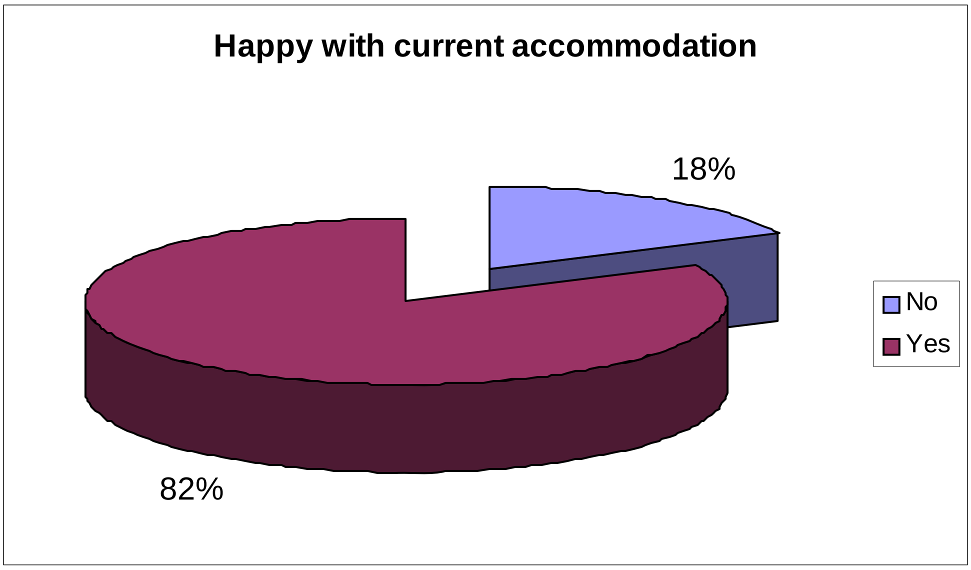
Question 5 - How many staff work on the premises?

In total, the businesses employ 55 full time staff and 89 part time workers. On average, each business employs 2 full time and 4 part time staff, although one respondent business employs 10 full time and 10 part time staff.

Question 6 - How long has your business occupied your premises in Settle?



Question 8 - Are you satisfied with your current accommodation?



Reasons given by the 18% who are unhappy include premises being too small, awkward layout of the building and the amount of passing vehicular traffic and width of pavement.

Question 9 – Given the choice, what would be your optimum unit size?

Just 12 respondents have answered this question: 4 would choose a unit of up to 45m², 1 45 – 90m², 1 90 – 140m², 1 140 – 185m², 1 185 – 370m², 2 370 – 555m² and 2 555 – 930m².

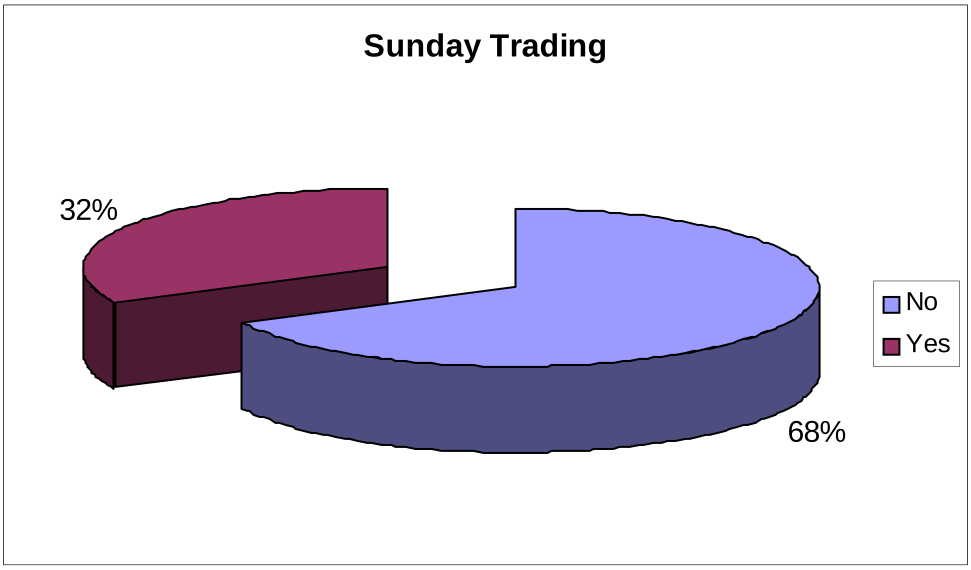
Question10 - Do you have any plans for investment in your current premises?

Five respondents intend to redecorate their premises, some of these also state that this is done on an annual basis. One will be redecorating the shop front. Another respondent is refurbishing the first floor to allow a new retail sales area to be created and another makes mention of a desire to replace the floor materials at ground floor level.

Question 11 - Do you expect any changes to your business over the next few years?

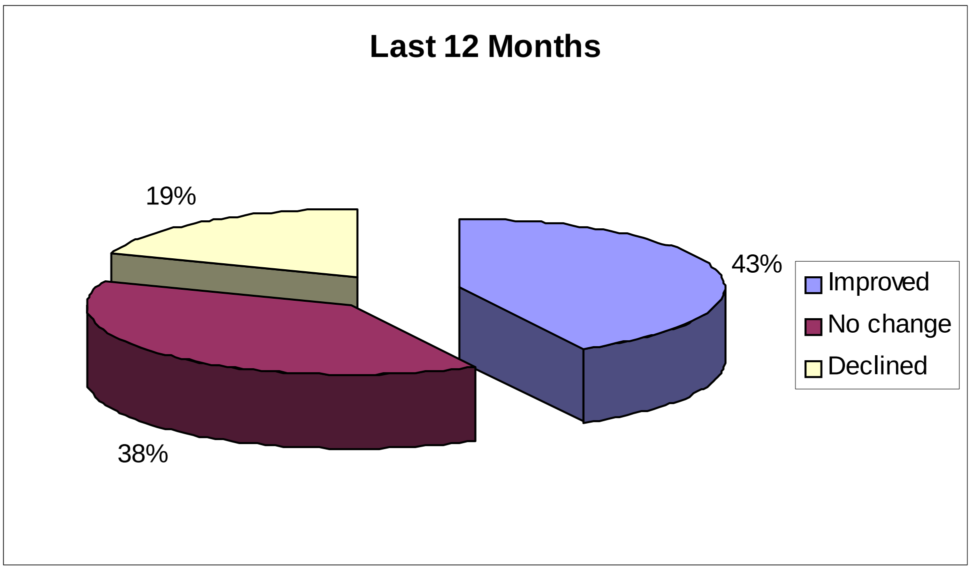
Four respondents are expecting to expand within their current premises, three indicate they might be considering relocating to alternative premises in Settle and two businesses foresee the possibility of closing down their operation.

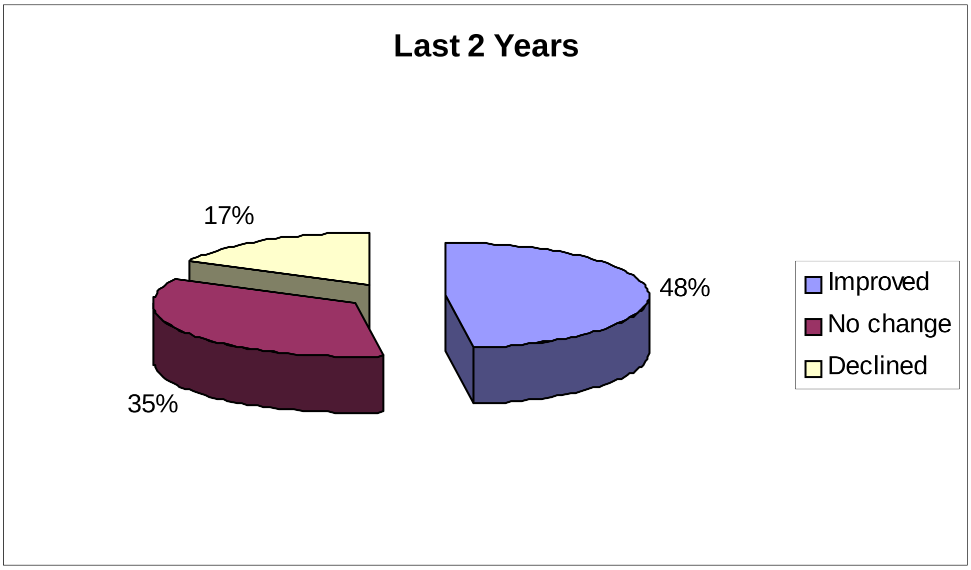
Question12 - Do you currently trade on Sundays?



Question 13 – related to turnover of the businesses and the responses are treated as confidential.

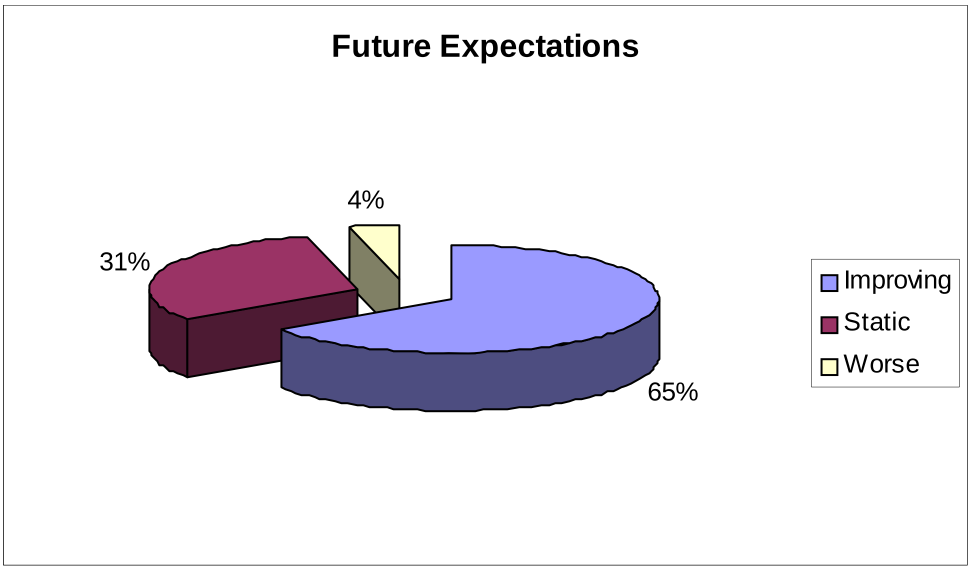
Question 14 - Has your business traded better, worse or about the same over the last 12 months and last 2 years?





There are a variety of reasons given for changes in trade. They include upturn since foot and mouth, better products on sale, quality genuine good food, becoming better established and better known and increased stock. More negative responses include dilapidation of town centre premises, failure of unrestricted access to their shop for cars, out of centre developments. One respondent gives a very full answer '*The arrival of Booths plus the new primary school took the heart out of the centre of Settle. Prior to this, Mothers come up town to the old school at 8.30am, shopped and back again mid afternoon, now free parking at Booths and Watershed Mill, Why pay for a central car parking space?'*

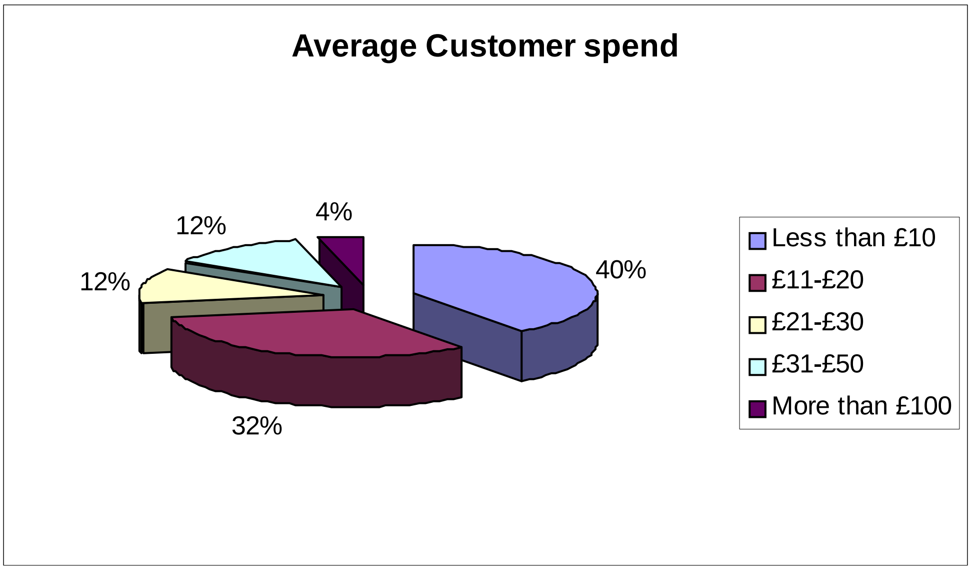
Question 16 - What are your expectations for trading over the next two years?



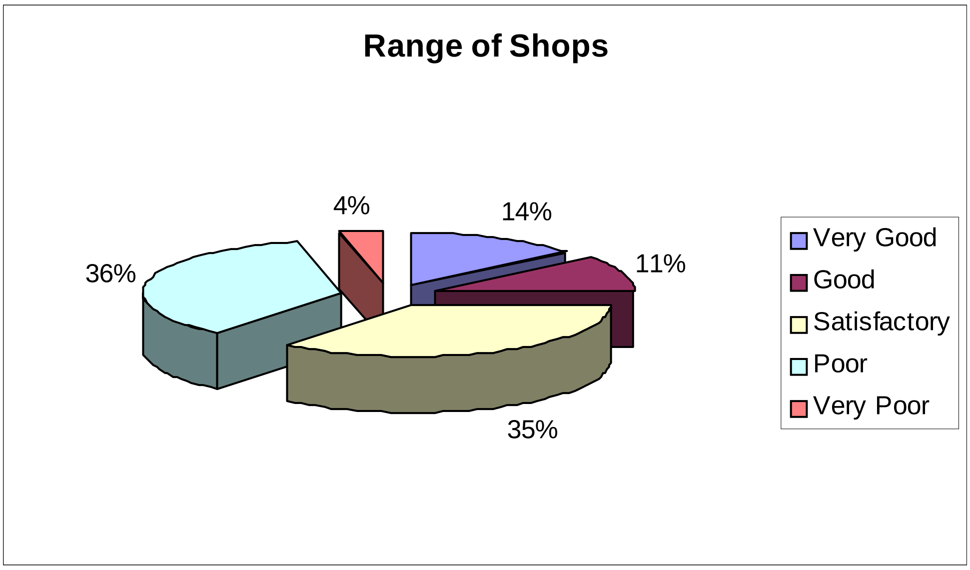
Questions 17-19 - Concerned businesses knowledge about their customers.

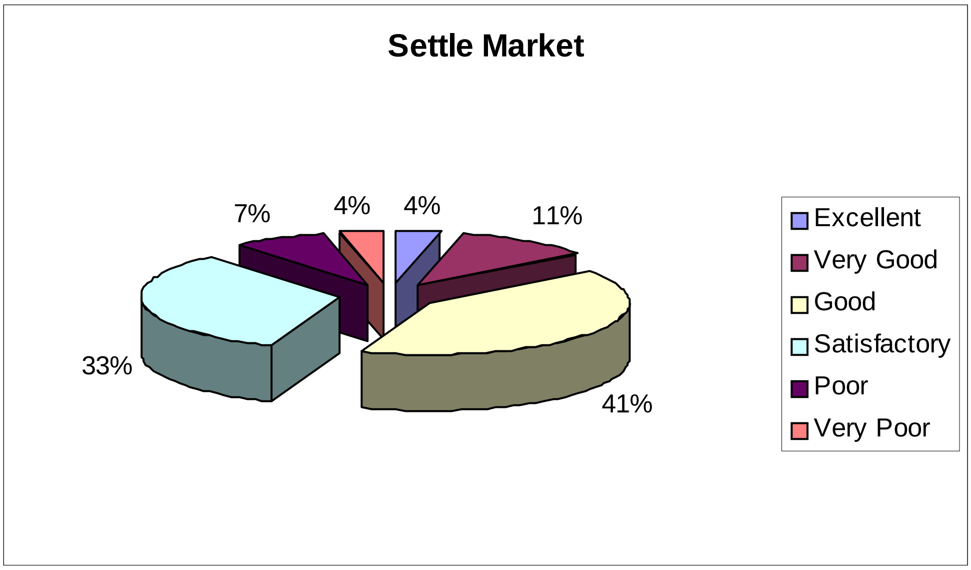
The majority of respondents are well aware of where their customers come from and what proportion are regular, passers by, occasional or tourists. 18 businesses benefit from customers of all types and 5 believe their trade is almost entirely from regular customers.

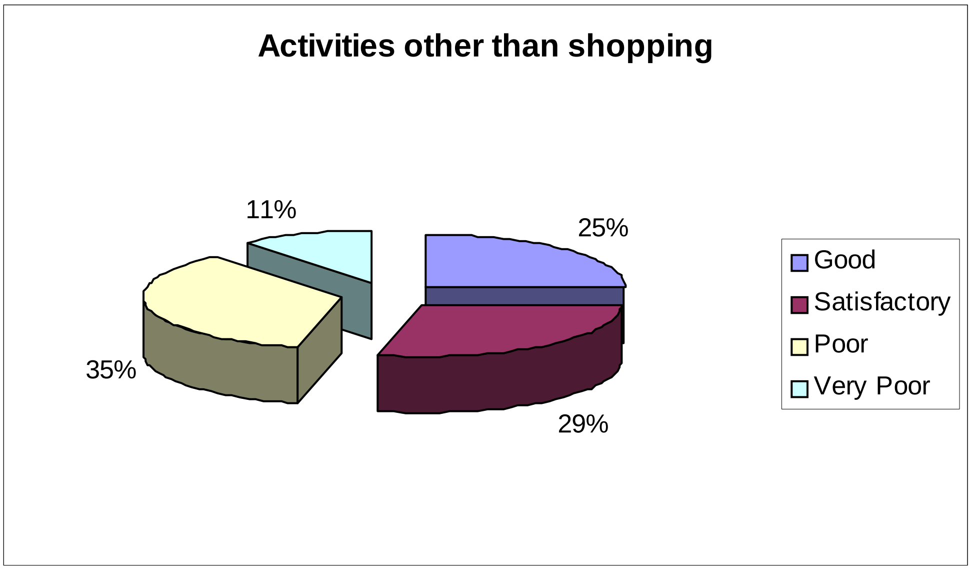
Question 18 concerned how far customers travel to visit the business. On average, 23% of customers travel less than 1 mile, 20% between 1 and 2 miles, 19% from 2 to 5 miles and 37% from more than 5 miles. This reflects both the rural nature of Settle and also the boost the town receives from tourism.

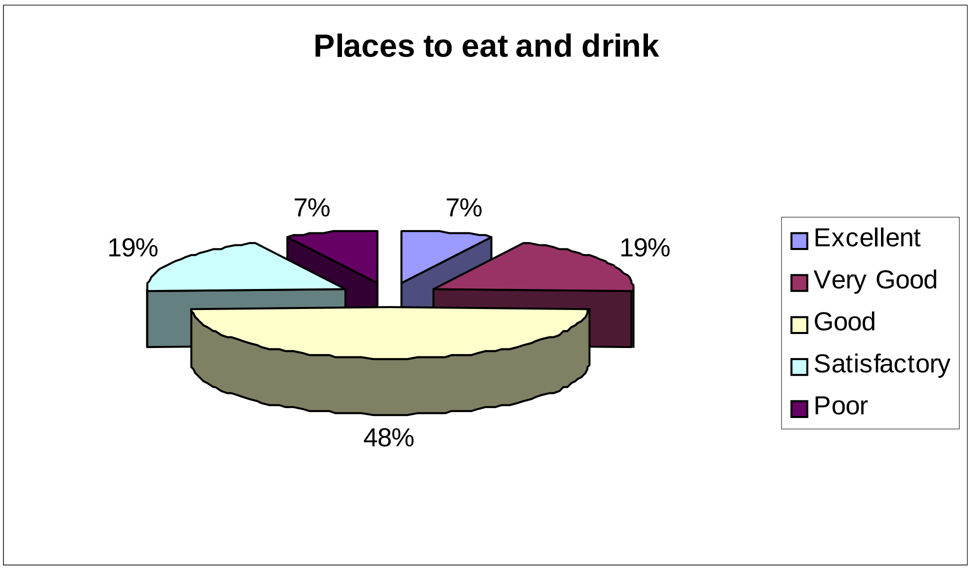


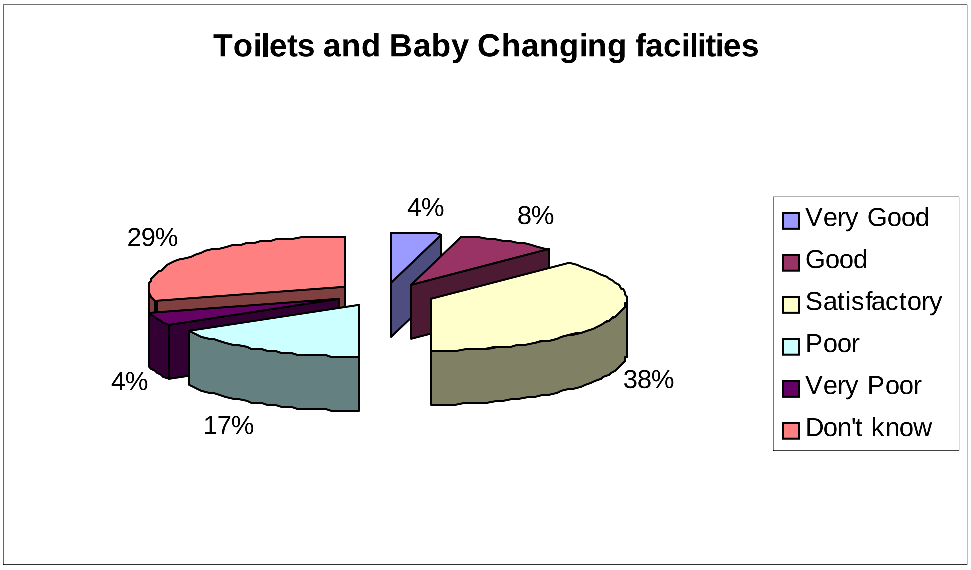
Question 20 - Respondents were asked to rate a range of aspects of the centre.

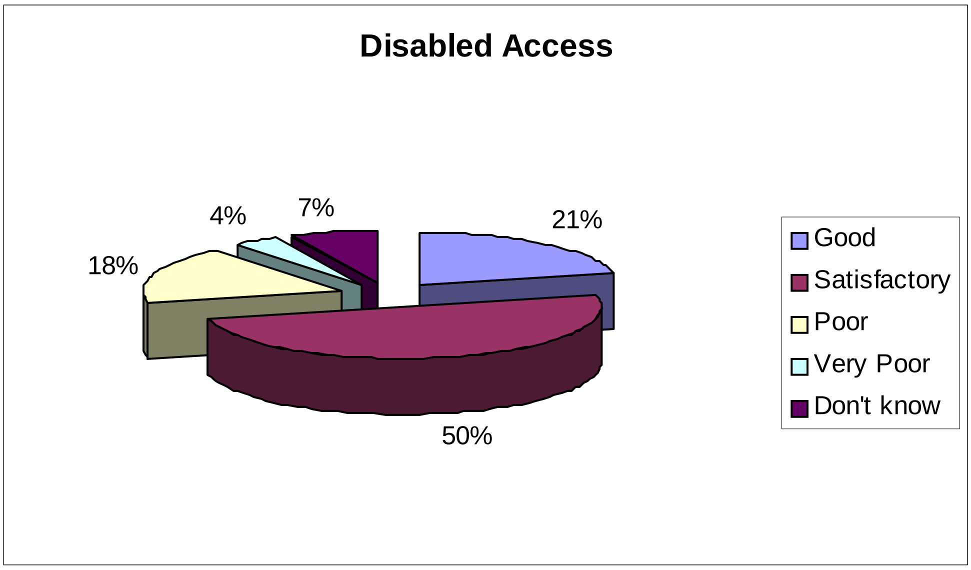


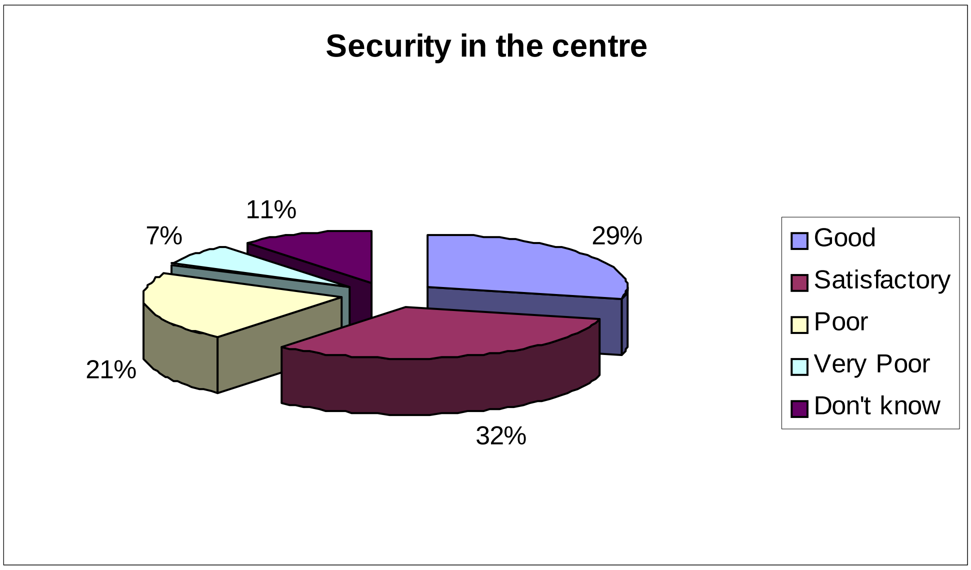

Settle Market
7%
4%
4%
11%
33%
41%
Excellent
Very Good
Good
Satisfactory
Poor
Very Poor

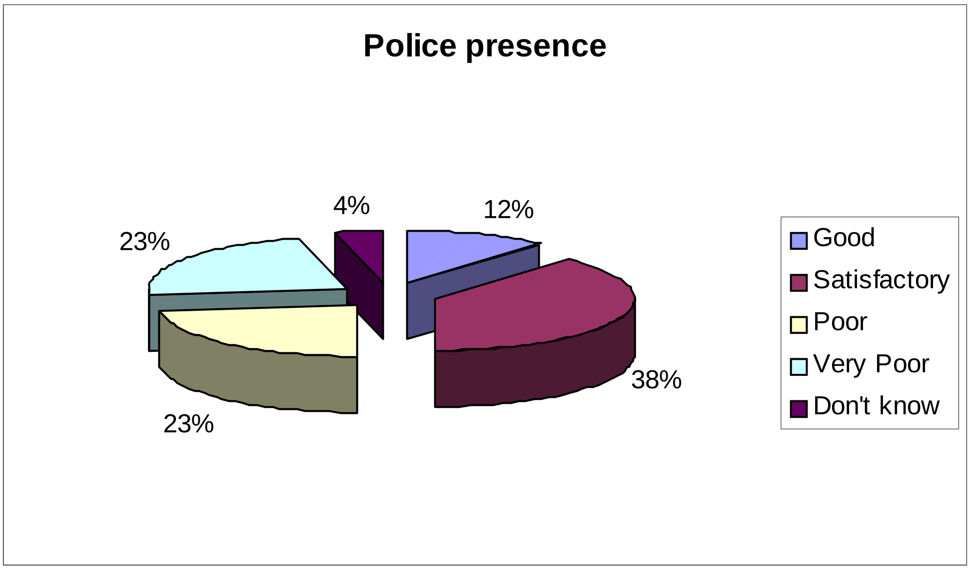

Activities other than shopping
11%
25%
35%
29%
Good
Satisfactory
Poor
Very Poor

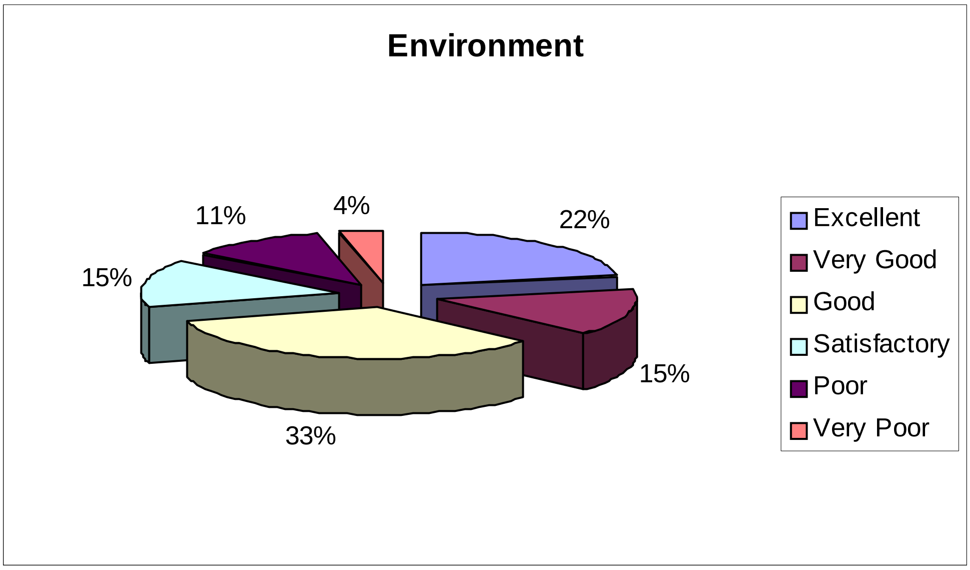

Places to eat and drink
7%
7%
19%
19%
48%
Excellent
Very Good
Good
Satisfactory
Poor

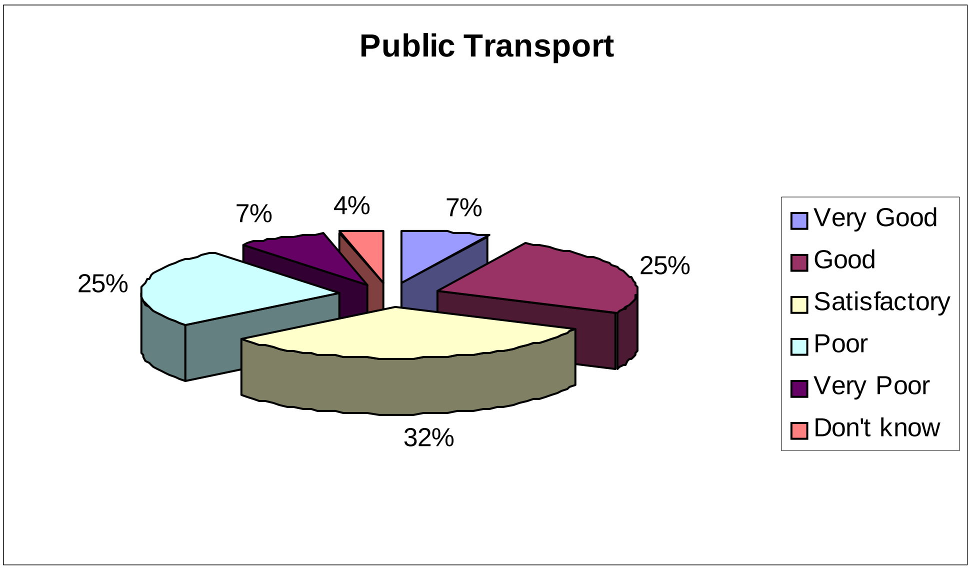

Toilets and Baby Changing facilities
4%
8%
29%
4%
17%
38%
Very Good
Good
Satisfactory
Poor
Very Poor
Don't know

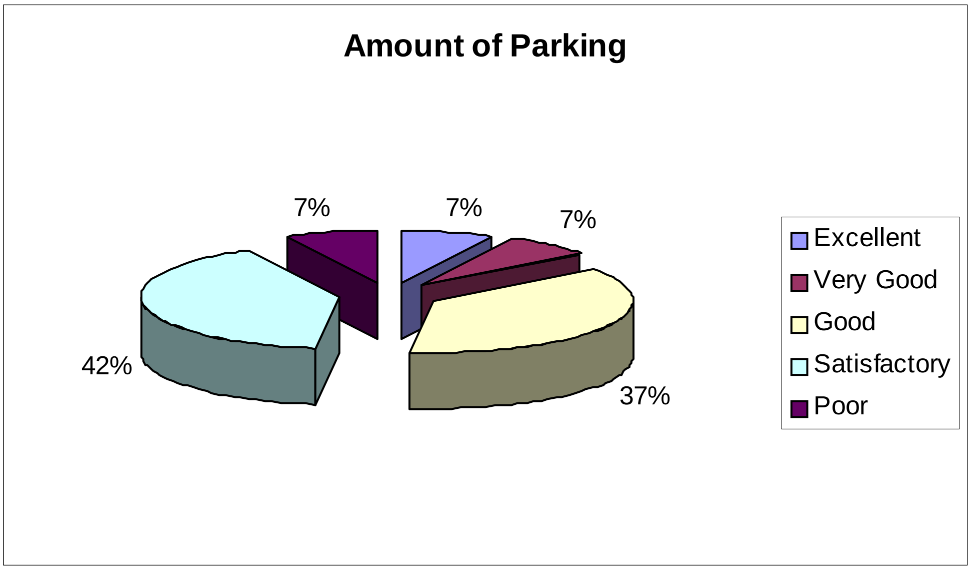

Disabled Access
21%
50%
18%
4%
7%
Good
Satisfactory
Poor
Very Poor
Don't know

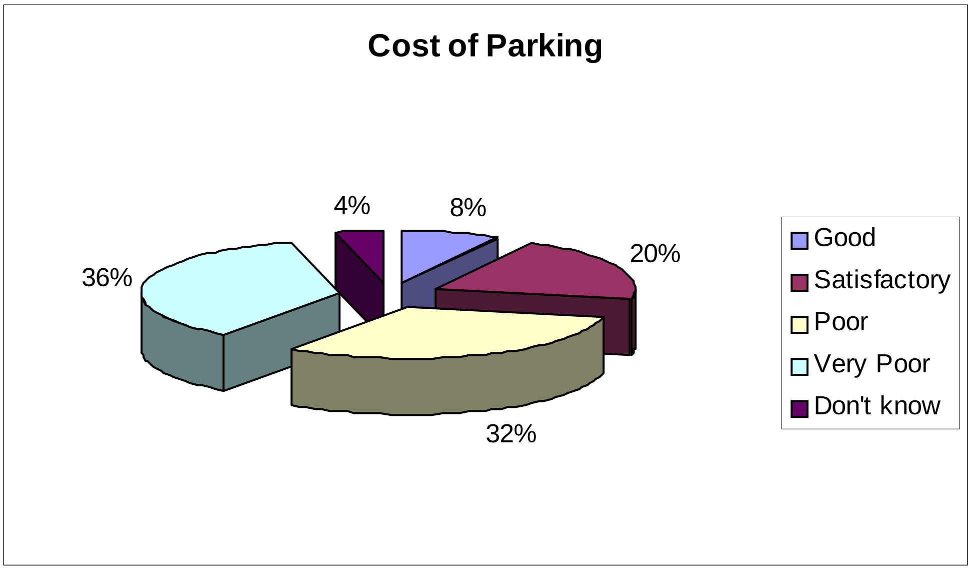

Security in the centre
29%
32%
21%
7%
11%
Good
Satisfactory
Poor
Very Poor
Don't know

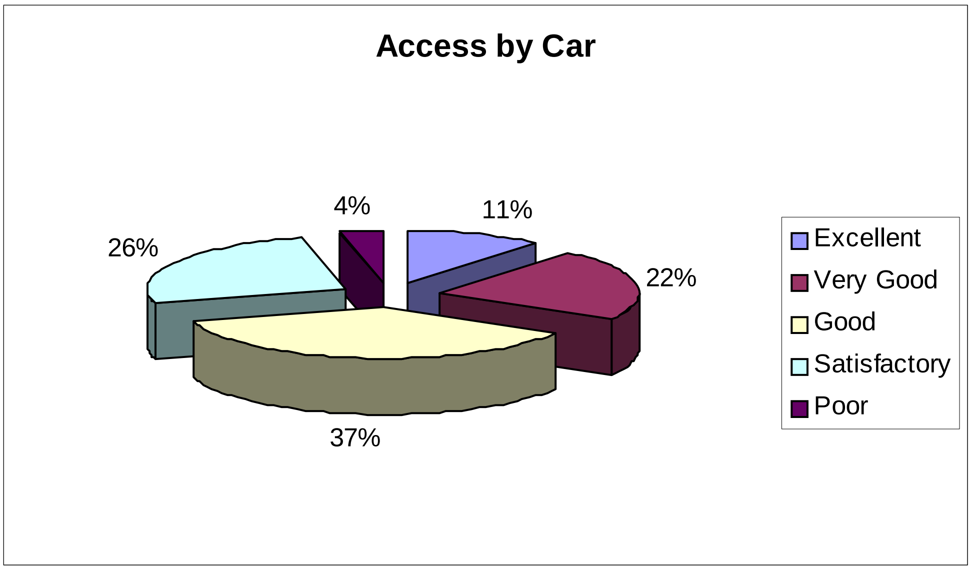

Police presence
4%
12%
23%
38%
23%
Good
Satisfactory
Poor
Very Poor
Don't know

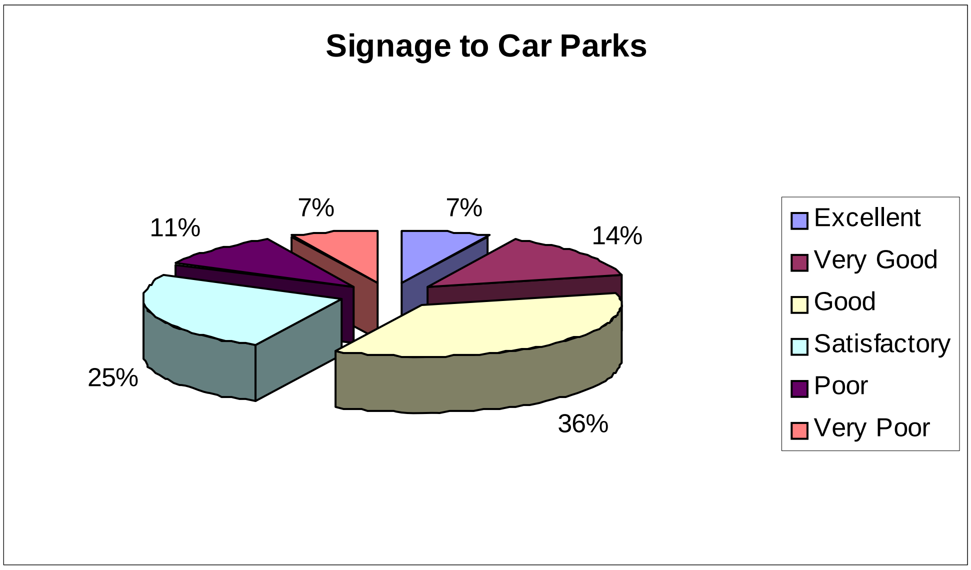

Environment
11%
4%
22%
15%
15%
33%
Excellent
Very Good
Good
Satisfactory
Poor
Very Poor

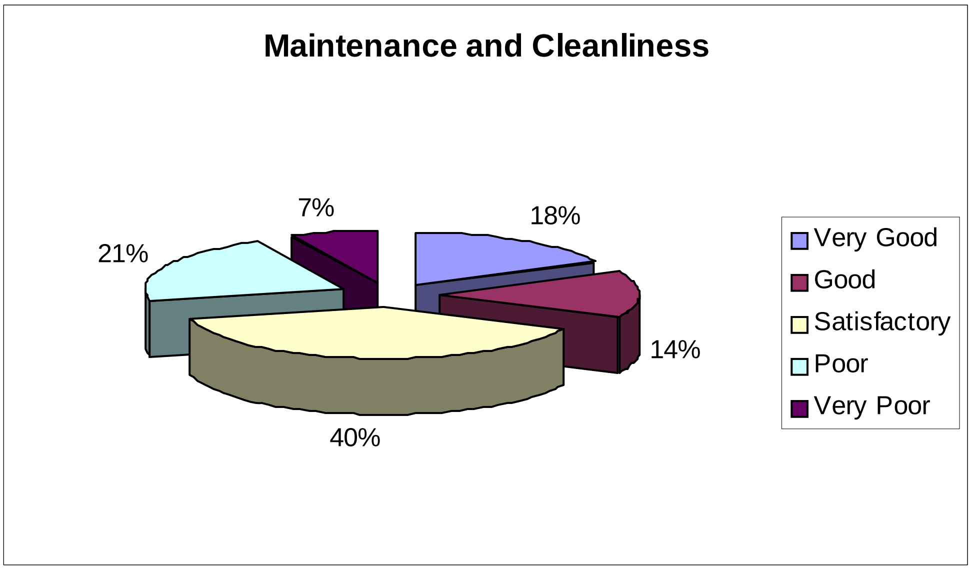

Public Transport
7%
4%
7%
25%
25%
32%
Very Good
Good
Satisfactory
Poor
Very Poor
Don't know


Amount of Parking
7%
7%
7%
42%
37%
Excellent
Very Good
Good
Satisfactory
Poor


Cost of Parking
4%
8%
20%
36%
32%
Good
Satisfactory
Poor
Very Poor
Don't know


Access by Car
4%
11%
26%
22%
37%
Excellent
Very Good
Good
Satisfactory
Poor





Question 21 - What do you think are the major strengths of Settle town centre?

There are two major themes which run through the comments made about the strengths of Settle. Firstly, although expressed in several different ways the majority of respondents make reference to Settle being a pretty market town with a lot of history and historic buildings set in a picturesque area. The second major strength noted is the nature of the shopping experience with most businesses being independent and family run with pleasant and helpful service. Another strength identified is the town's compact nature and also free parking, although this contradicts the worst rated aspect of the centre which is the cost of parking!

Question 22 - What do you think are the major weaknesses of Settle town centre?

Similarly to the question above, there are several themes running through the responses to this question. A number of respondents make reference to the heavy traffic, especially lorries accessing the quarry going right through the town centre. There are several references to the range of shops and also the poor appearance of a number of empty shops. Similarly, poor parking, the cost of parking and parking in the Market Place are mentioned by several respondents as an identified weakness. One respondent believes that allowing the fair to stay in the Market Place for two weeks every year is a weakness.

Question 23 - What improvements/additional features would you like to see in Settle town centre?

In many ways, the response to this question is linked to the weaknesses identified above. There is a desire to see lorries and other HGVs banned from the centre or certainly between 9am and 5pm and several respondents believe they should be banned from coming in from the eastern side and should only be allowed access to the quarry from the west. This is obviously a very important issue in the eyes of the businesses in Settle. Many respondents believe that parking in the Market Place should be more restricted or even barred, with the area made pedestrianised or more market uses explored and the area generally improved. Increased police presence is also seen as a key improvement with more foot patrols and one respondent thinks the garden in front of the Police station should be improved. Lastly, mentioned a couple of times is the need to improve the range of shops and also the range of other activities for tourists.

Question 24 - Do you wish to make any other comments about Settle town centre?

The responses to this question are set out below (verbatim).

'Lighting at night is terrible. Too many empty shop units. Stop wagons on market days and weekends before a visitor is killed.'

'Settle Market Place is at least 20 years behind the times in the management of traffic and parking in and around the Square. Some limited short stay parking is needed but most of the cars in the centre park in a haphazard way for most of the day without penalty. A comprehensive review of this civic space is needed to provide local people and visitors with a space they can be proud of. Traffic calming and restrictions need to be put in place to provide pedestrians with space to amble about, sit and relax and admire the wonderful buildings and scenery.'

'Business Rates – These continue to rise annually well above inflation levels and we receive very little service for these high charges. Not only would this help existing shops, but would encourage new ventures to open and fill up the empty ones.'

'Settle shop keepers have a mixed reputation vis-a-vis friendliness and helpfulness – a bit of PR training go amiss sometimes. People come to the YDNP for its visual beauty and for the recreation it offers (walking, cycling etc.) yet they very often don't feel welcome – not just particularly in Settle, but in the Park generally. If we are to use the internet to boast new businesses, we need broadband. We were going to be fast-tracked for it as part of the foot and mouth recovery programme – what happened?'

'There's always plenty of talk about improvements but very little action!'

'Things are improving slowly. Many shop units are small in size and this was one of my problems as my business expanded. Fortunately I was able to secure a good sized premises in a main location. There are a lot of small businesses "off the beaten track" which could benefit from sign posting. Rents and rates are a problem when roads are closed for water works, gas works, road repairs which together with foot and mouth made trading in the town very difficult for several years. Uninterrupted trading patterns must be allowed or kept to a minimum. Once trade is lost it is difficult to attract people back. The Yorkshire Tourist Board could advertise this region more and the government through taxation could fund the TIC. Local Councils work hard and have meagre sums of money to invest particularly here in Settle. Taxation is high – returns are low! I feel optimistic for the future of the area – people are dedicated and work long hours in improving and revitalising this area and I am pleased that ideas are continuing to develop but progress is slow. I won't feel the benefit but perhaps young people wanting to stay in to live and work here will benefit.'

'Nice village that can be quite in winter and busy in the summer, but high consumption of alcohol on weekends is not attractive.'

'Heavy traffic particularly quarry wagons need re-routing (urgently). Settle Town Council seem to have a negative attitude to retailers/business. They should be more pro-active. Grant aid is needed to help businesses to improve premises. Many businesses still close on Wednesday afternoons. Why? I think that the proposed RMT Plans for a hub, and to use the Town Hall as a business centre are good, but help will be needed to push these plans through. There is a will in C.R.E. (Chamber of Trade) to be involved in these projects. This should be encouraged. The market place and surrounding area needs a more rigid cleaning policy.'

'Foot and mouth disease had a dreadful affect on our business, but having been here many years had "reserves" that we could use, unlike many other businesses. School groups, caring clubs and tourists were prohibited, and to a certain extent, quite understandably. However very little was done to entice the regular visitors back, and whilst jobs in tourism and catering are poorly paid they are jobs. An area or town has the greatest difficulty in regenerating itself without a 'strong' base. Local people need to be encouraged to use local facilities whilst they are available and keep the prosperity within the area, thereby encouraging entrepreneurial development and new businesses. As with other market towns, the building and introduction of an "out of town" supermarket leads to a slow death at the centre. Booths supermarket is here to stay, and as their customers drive to their free car park, shop in Booths, and drive back home, might a free shuttle bus from Booth's car park to the market square, and back be used on a trial period to introduce these people to the specialist outlets that remain in the centre of Settle.'

Appendix 3 – Visitor Survey Questionnaire & Analysis

Job No. 240104 January 2004

NEMS market research

SKIPTON / SETTLE STREET SHOPPERS' / VISITORS' SURVEY

INTERVIEWER: AT THE RELEVANT QUESTIONS READ OUT EITHER SKIPTON / SETTLE DEPENDING ON THE TOWN CENTRE YOU ARE WORKING IN

INTRODUCTION: Good morning/afternoon, I am …… from NEMS market research, an independent market research company. We are conducting a market research survey about people's shopping habits, and I wonder if you can spare a few minutes.

ASK ALL:

Q.1 What is the **main** reason for your visit to Skipton / Settle Town Centre today ?

DO NOT READ OUT. ONE ANSWER ONLY

	(1)	
* Food shopping (not takeaways, cafe, restaurant)	1	GO TO Q.2
** Non-food shopping (e.g. shoes, clothes, jewellery)	2	GO TO Q.2
Using services (e.g. bank, building society, etc.)	3	GO TO Q.2
Health Services (e.g. doctors, dentist, etc)	4	GO TO Q.2
Work / business	5	GO TO Q.2
Education / college	6	GO TO Q.2
Visiting / meeting friends / relatives	7	GO TO Q.2
Eating / drinking out	8	GO TO Q.2
Leisure (sports / entertainment etc.)	9	GO TO Q.2
Library	A	GO TO Q.2
Visiting the market	B	GO TO Q.2
Tourism / Skipton Castle	C	GO TO Q.2
Other (PLEASE WRITE IN)	D	GO TO Q.2
Day visit	E	CLOSE INTERVIEW

ASK THOSE WHO DID NOT ANSWER "**DAY VISIT**" AT Q.1

Q.2 Will you combine the main purpose of your trip today with some other purpose ?

	(2)	
Yes	1	GO TO Q.3
No	2	GO TO Q.4

ASK THOSE WHO ANSWERED "**YES**" AT Q.2, OTHERS GO TO Q.4

Q.3 What other things will you do today ?

CAN BE MULTICODED

	(3)
* Food shopping (not takeaways, cafe, restaurant)	1
** Non-food shopping (e.g. .shoes, clothes, jewellery)	2
Using services (e.g. bank, building society etc.)	3
Health services (e.g. doctors, dentist etc.)	4
Work / business	5
Education / college	6
Visiting / meeting friends / relatives	7
Eating / drinking out	8
Leisure (sports / entertainment / museums, etc.)	9
Library	A
Visiting the market	B
Tourism / Skipton Castle	C
Other (PLEASE WRITE IN)	D
(Don't know / not sure)	E

---

* ASK THOSE WHO ANSWERED "**FOOD SHOPPING**" AT **Q.1** OR **Q.3**, OTHERS GO TO Q.6

Q.4 Are you doing your main food shopping in Skipton / Settle Town Centre today ?

	(4)	
Yes	1	GO TO Q.5
No	2	GO TO Q.6

ASK THOSE WHO ANSWERED "**YES**" AT Q.4, OTHERS GO TO Q.6

Q.5 What food stores have you visited, or will you visit in Skipton / Settle today ?

CAN BE MULTICODED. DO NOT READ OUT

	(5)
Morrisons	1
Tesco	2
Spar	3
Co-Op	4
Other (PLEASE WRITE IN)	5

GO TO Q.7

ASK THOSE WHO ANSWERED "**NO**" AT Q.4, OTHERS GO TO Q.7

Q.6 Where do you usually do your main food shopping ?

DO NOT READ OUT

	(6)
Asda, Colne	1
Asda, Harrogate	2
Booths, Ilkley	3
Booths, Settle	4
Co-Op, Cross Hills	5
Co-Op, Settle	6
Co-Op, Skipton	7
Kwik Save, Ilkley	8
Morrisons, Keighley	9
Morrisons, Skipton	A
Safeway, Harrogate	B
Sainsbury, Keighley	C
Spar, Settle	D
Tesco, Ilkley	E
Tesco, Skipton	F
Other (PLEASE WRITE IN)	G

____

ASK ALL:

Q.7 How often do you do your main food shopping ?

	(7)
Daily	1
Twice weekly	2
Weekly	3
Fortnightly	4
Monthly	5
Less often	6
Other (PLEASE WRITE IN)	7
______________________________	
(Don't know)	8

ASK ALL: SHOWCARD 'A'

Q.8 How much do you spend on your main food shopping ?

READ OUT:

	(8)
Less than £10	1
£11 - £20	2
£21 - £50	3
£51 - £100	4
£100 - £200	5
£201 or more	6
(Don't know)	7

ASK ALL:

Q.9 Where else do you shop for food ?

RANK IN ORDER OF MENTIONED

	1st mention (9)	**2nd mention** (10)	**3rd mention** (11)
Asda, Colne	1	1	1
Asda, Harrogate	2	2	2
Booths, Ilkley	3	3	3
Booths, Settle	4	4	4
Co-Op, Cross Hills	5	5	5
Co-Op, Settle	6	6	6
Co-Op, Skipton	7	7	7
Kwik Save, Ilkley	8	8	8
Morrisons, Keighley	9	9	9
Morrisons, Skipton	A	A	A
Safeway, Harrogate	B	B	B
Sainsbury, Keighley	C	C	C
Spar, Settle	D	D	D
Tesco, Ilkley	E	E	E
Tesco, Skipton	F	F	F
Other (PLEASE WRITE IN)	G	G	G
______________________________			
(Nowhere else)	H	H	H

ASK ALL:

Q.10 How often do you do your top up food shopping ?

	(12)	
Daily	1	
Twice weekly	2	
Weekly	3	
Fortnightly	4	
Monthly	5	
Less often	6	
Other (PLEASE WRITE IN)	7	
(Don't know)	8	
(Don't do top-up shopping)	9	GO TO Q.12

ASK THOSE WHO DO TOP-UP SHOPPING AT Q.10, OTHERS GO TO Q.12

Q.11 How much do you spend on your top up food shopping ?

READ OUT:

	(13)
Less than £10	1
£11 - £20	2
£21 - £50	3
£51 - £100	4
£100 - £200	5
£201 or more	6
(Don't know)	7

** ASK THOSE WHO ANSWERED "**NON-FOOD-SHOPPING**" AT **Q.1** OR **Q.3**, OTHERS GO TO Q.13

SHOWCARD 'B'

Q.12 Which of these types of non-food shopping will you do today in Skipton / Settle Town Centre ?

CAN BE MULTICODED

	(14)
Clothing / footwear	1
Toys	2
Large household goods	3
Jewellery / gifts	4
DIY / ironmongery	5
Records / books	6
Furniture/carpets	7
Sports goods	8
Small (everyday) household goods	9
Chemist	A
Optician	B
Florist	C
Electrical	D
Other (PLEASE WRITE IN)	E
(Don't know)	F

ASK ALL:

Q.13 Is Skipton / Settle / Town Centre your **main** centre for clothes / footwear shopping ?

	(15)	
Yes	1	GO TO Q.15
No	2	GO TO Q.14

ASK THOSE WHO ANSWERED "**NO**" AT Q.13, OTHERS GO TO Q.15

Q.14 Where do you **mainly** go to buy clothes / footwear shopping ?

ONE ANSWER ONLY

	(16)
Bradford City Centre	1
Harrogate Town Centre	2
Ilkley Town Centre	3
Keighley Town Centre	4
Leeds City Centre	5
Nelson and Colne	6
Skipton Town Centre	7
Catalogue / mail order / Internet	8
Other (PLEASE WRITE IN)	9
(Don't know)	A

ASK ALL:

Q.15 What is the **main** reason for choosing Skipton / Settle Town Centre for a shopping trip ?

ONE ANSWER ONLY (17)

Choice / quality / range of shops	1
Choice / quality / range of services such as. banks, building societies, etc	2
Choice / quality / range of places to eat and drink	3
Affordable prices	4
Late night shopping	5
Safe / secure shopping environment	6
Attractive shopping environment	7
Parking provision	8
Close to home	9
Close to work	A
Presence of other amenities	B
On way to Dales	C
Other (PLEASE WRITE IN) ______________________	D
(Don't know)	E
(Not here for shopping)	F

ASK ALL:

Q.16 How long do you intend to spend in Skipton / Settle Town Centre today ?

ONE ANSWER ONLY (18)

Up to ½ an hour	1
About an hour	2
About 1 ½ hours	3
About 2 hours	4
2 -3 hours	5
3 hours or more	6
(Don't know)	7

ASK ALL:

Q.17 What improvements, if any, would you like to see to the shopping facilities in Skipton / Settle Town Centre ?

CAN BE MULTICODED

(19)

Additional multiple traders (e.g. Marks & Spencer, Argos, River Island etc)	1
Additional small specialist traders	2
A wider choice of food shops	3
A wider choice of non-food shops	4
Fewer charity and £1 shops	5
More coffee shops	6
More shops / cafes open in the early evening	7
Other (PLEASE WRITE IN) ______________________	8
(Don't know)	9

ASK ALL:

Q.18 Please state what you particularly like about Skipton / Settle Town Centre ?
DO NOT PROMPT. ONE ANSWER ONLY

ASK ALL:

Q.19 What else do you like about Skipton / Settle Town Centre ?
DO NOT PROMPT. CAN BE MULTICODED

	Q.18 1st mention (20)	**Q.19 Other mentions** (21)
Nothing	1	1
Close to home	2	2
Easy to get to on foot	3	3
Easy access by public transport	4	4
Easy access by private vehicle	5	5
Proximity of parking to shops	6	6
Parking costs	7	7
Not too busy / crowded	8	8
Ease of parking	9	9
Choice of shops	A	A
Quality of Shops	B	B
Skipton Market	C	C
Choice of services (banks / building societies)	D	D
Choice of places to eat / drink	E	E
Facilities for shoppers (e.g. toilets, mother/baby, seating, etc.)	F	F
Attractiveness of environment	G	G
Other amenities (e.g. museum / library, etc.)	H	H
Safe / secure environment	I	I
Other (PLEASE WRITE IN) ________________	J	J
(Don't know / none mentioned)	K	K

ASK ALL:

Q.20 What do you particularly dislike about Skipton / Settle Town Centre ?
DO NOT PROMPT. ONE ANSWER ONLY

ASK ALL:

Q.21 What else do you particularly dislike about Skipton / Settle Town Centre?
DO NOT PROMPT. CAN BE MULTCODED

	Q.20 1st mention (22)	**Q.21 Other mentions** (23)
Nothing	1	1
Traffic congestion	2	2
Difficulty of crossing roads	3	3
Not enough choice of shops	4	4
Not enough clothes shops	5	5
Poor quality shops	6	6
To few multiple retailers	7	7
Too many charity shops	8	8
Prices too high	9	9
Too few pubs / restaurants / eating places	A	A
Lack of parking	B	B
Cost of parking	C	C
Poor facilities (e.g. seating, toilets, etc.)	D	D
Poor accessibility / difficult to get to	E	E
Streets dirty / litter	F	F
Everything	G	G
Other (PLEASE WRITE IN) ________________	H	H
(Don't know / none mentioned)	I	I

ASK ALL:

Q.22 Do you ever come to Skipton / Settle Town Centre in the evenings?

	(24)	
Yes	1	GO TO Q.24
No	2	GO TO Q.25

ASK THOSE WHO SAID '**YES**' AT Q.22, OTHERS GO TO Q.24:

Q.23 What do you do in Skipton / Settle Town Centre in the evening?

DO NOT PROMPT. CAN BE MULTICODED

	(25)
Sports facilities	1
Health & fitness clubs	2
Pubs	3
Restaurants	4
Services (e.g. cash tills)	5
Take away food	6
Walk about / look around	7
Cinema	8
Night-clubs	9
Amusement arcade	A
Theatre	B
Museum	C
Other (PLEASE WRITE IN)	D
(Don't know / none mentioned)	E

ASK ALL:

Q.24 What leisure facilities would you like to see in Skipton / Settle Town Centre ?

DO NOT PROMPT. CAN BE MULTICODED

	(26)
Bingo	1
Other sports facilities	2
More health & fitness clubs	3
Restaurants	4
Better theatre	5
More Night-clubs	6
Late night shopping	7
Ten-pin bowling	8
Arts Centre	9
Skateboard / rollerblade park	A
Early evening facilities	B
Additional cultural facilities	C
Other (PLEASE WRITE IN)	D
(Don't know / none mentioned)	E

ASK ALL: SHOWCARD 'C'

Q.25 How important are the following amenities to you in creating an attractive town centre ?

READ OUT:

ROTATE ORDER. TICK START	**Very important** (27)	**Important** (28)	**Unimportant** (29)	**(Don't know)** (30)
A wide range of food shops	1	1	1	1
A wide range of non-food shops	2	2	2	2
A wide range of independent / speciality shops	3	3	3	3
High quality / exclusive shops	4	4	4	4
Shops related to tourist activity	5	5	5	5
Value / discount shops	6	6	6	6
Cafes / pubs / restaurants	7	7	7	7
Good / easy pedestrian access	8	8	8	8
Good / easy access by car	9	9	9	9
Ease of finding a car parking space	A	A	A	A
Provision of recreation/leisure (e.g. cinema)	B	B	B	B
Pleasant town centre environment	C	C	C	C
Culturally diverse	D	D	D	D
Safety	E	E	E	E
Easy to get around	F	F	F	F
A good quality traditional market	G	G	G	G
Maintenance and cleanliness	H	H	H	H

ASK ALL:

Q.26 How did you travel here today ?

	(31)
Car / van (driver)	1
Car / van (passenger)	2
Bus / coach	3
Train	4
Taxi	5
Walked	6
Bicycle	7
Motorcycle / moped / scooter	8
Other (PLEASE WRITE IN)	9
_______________________________	
(Don't know / can't remember)	A

CLASSIFICATION

NAME: ____

ADDRESS: ____

____

POST CODE: ☐☐☐☐ ☐☐☐ TEL. NO. ______________________________

SEX: (32)

Male	1
Female	2

AGE GROUP: (33)

16 - 24 years	1
25 - 34 years	2
35 - 44 years	3
45 - 54 years	4
55 - 64 years	5
65+ years	6
(Refused)	7

OCCUPATION OF CHIEF WAGE EARNER: ______________________________

(34)

AB	1
C1	2
C2	3
DE	4

ADULTS IN HOUSEHOLD (16+): (35)

One	1
Two	2
Three	3
Four or more	4

CHILDREN IN HOUSEHOLD: (36)

0 - 4 years	1
5 - 10 years	2
11 - 15 years	3

NO. OF CARS IN HOUSEHOLD: (37)

One	1
Two	2
Three	3
Four or more	4

DAY OF INTERVIEW: (38)

Monday	1
Tuesday	2
Wednesday	3
Thursday	4
Friday	5
Saturday	6

TIME OF INTERVIEW: (39)

10:00-11:00	1
11:01-12:00	2
12:01-13:00	3
13:01-14:00	4
14:01-15:00	5
15:01-16:00	6
16:01-17:00	7
17:01-18:00	8

LOCATION OF INTERVIEW: (40)

Skipton	1
Settle	2

DECLARATION: I certify that the interview has been personally carried out by me with the informant and conducted within the MRS Code of Conduct. I further certify that the informant is not a friend or relative of mine and I have not interviewed him / her on any survey in the last six months.

INTERVIEWER'S SIGNATURE: ______________________________ DATE: ____________________

Prepared by:
Donaldsons
St Paul's House
23 Park Square South
Leeds
LS1 2ND
Telephone 0113 246 1161
Facsimile 0113 244 1637

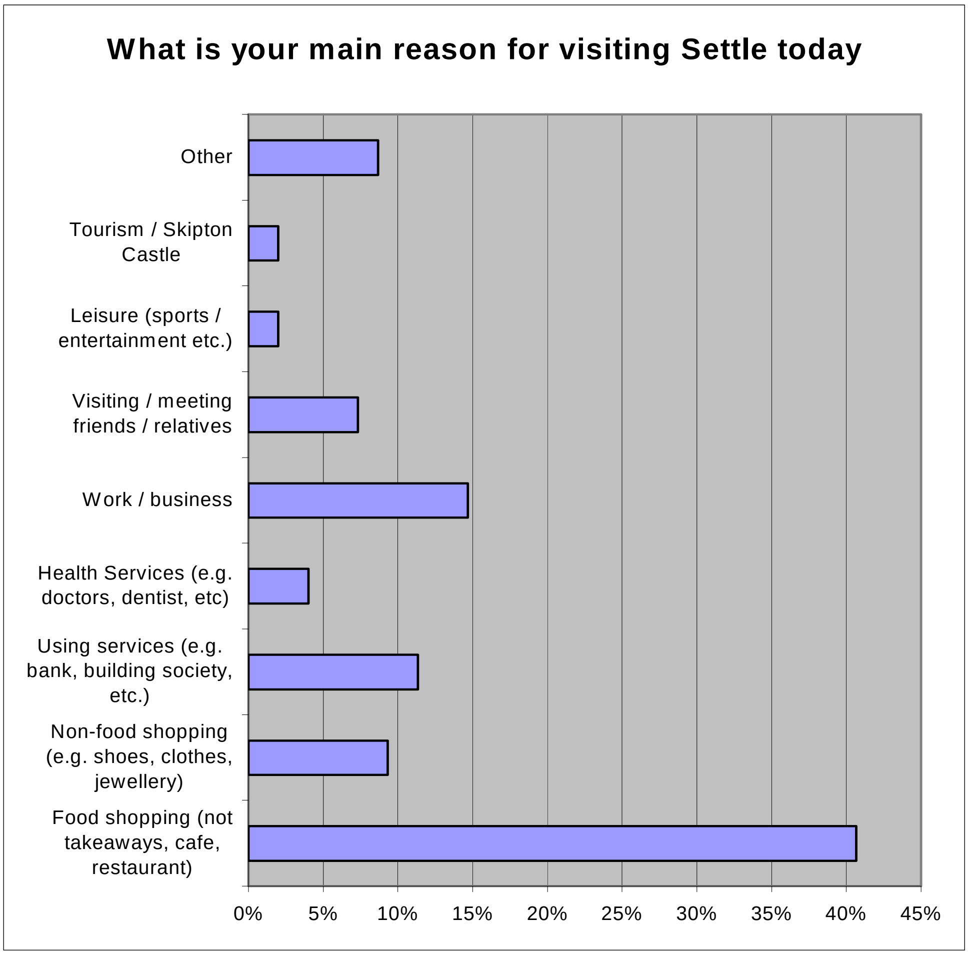
August 2004

CRAVEN DISTRICT COUNCIL

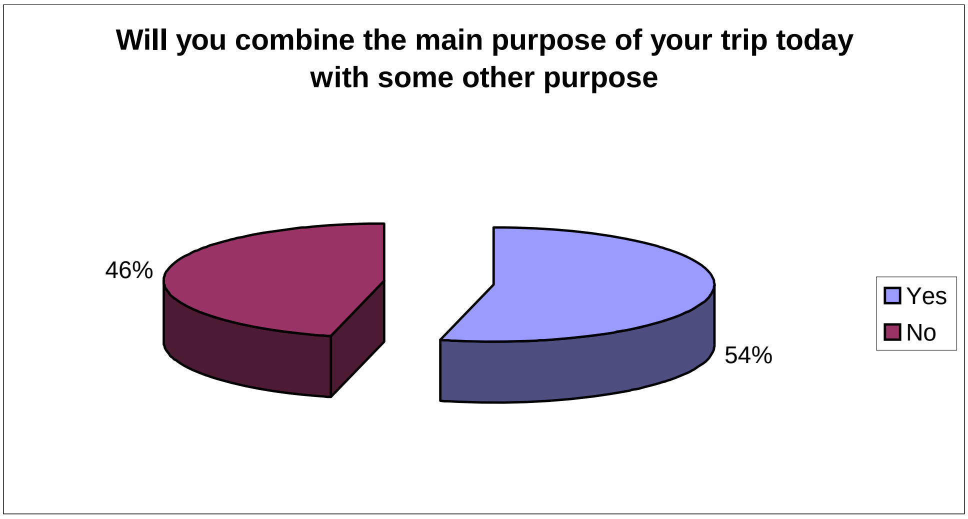
Settle Health Check In-Street Survey Appendix

Settle Heath Check In-Street Survey

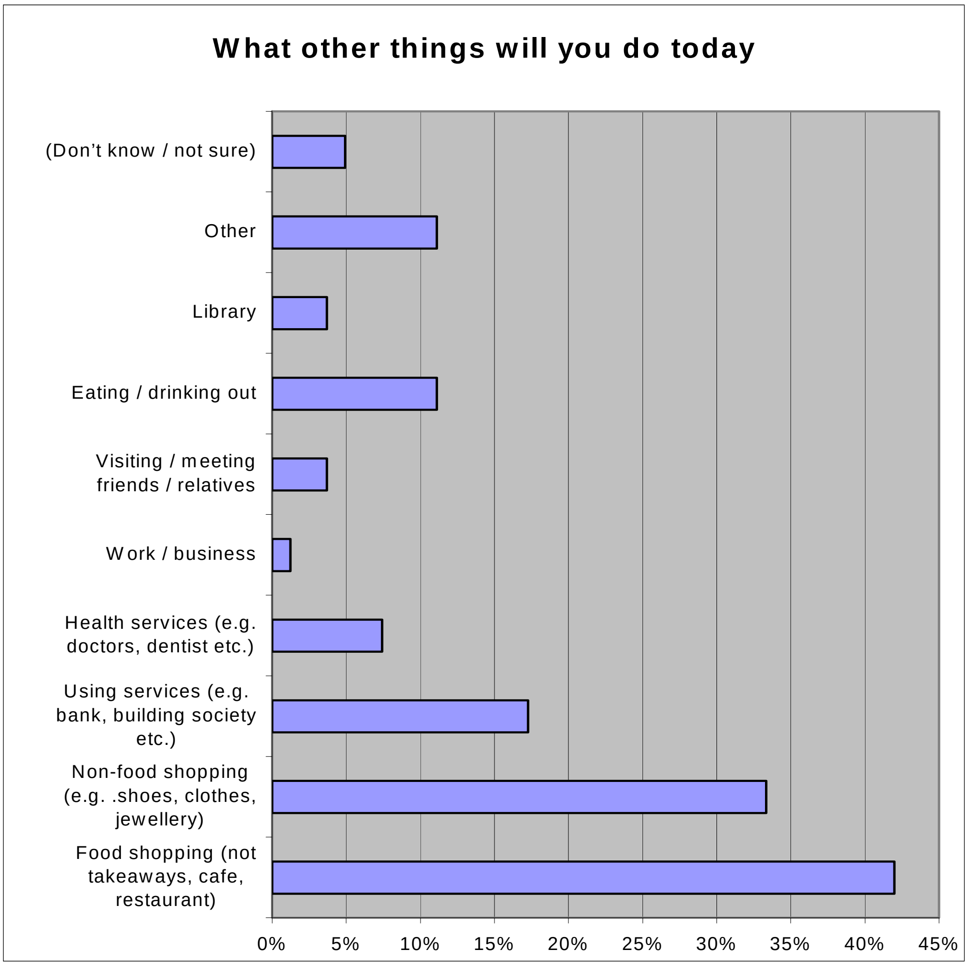
Question One – What is the main reason for your visit to Settle town centre today?



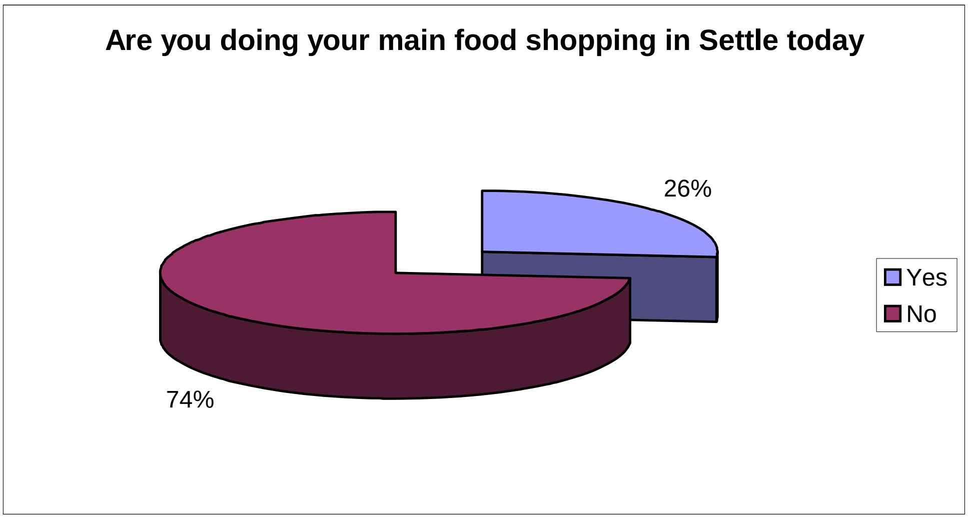
Question Two – Will you combine the main purpose of your trip today with some other purpose?



Question Three – What other things will you do today?



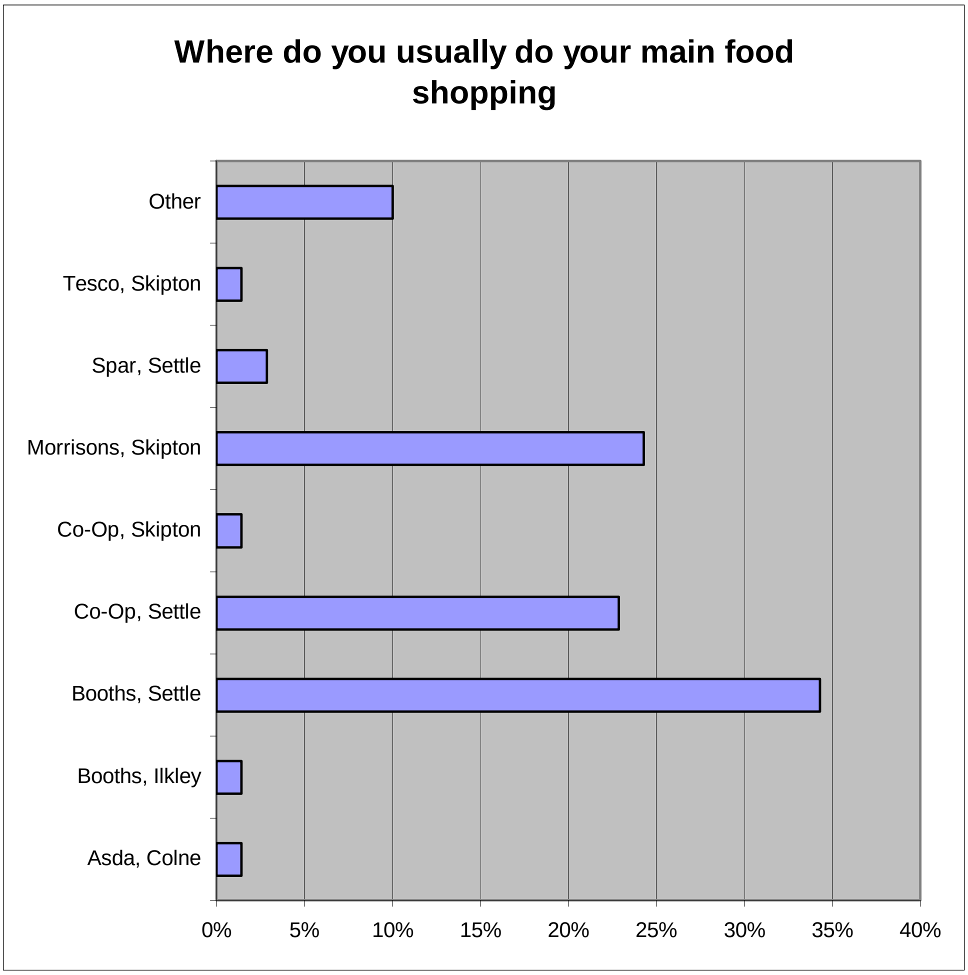
Question Four – Are you doing your main food shopping in Settle town centre today?



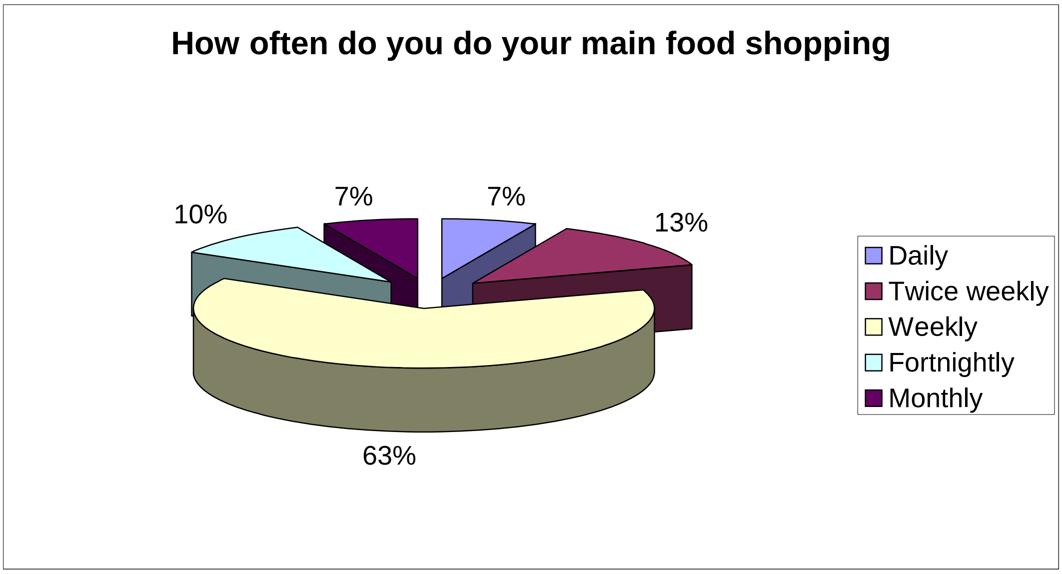
Question Five – What foodstore have you visited today?

Of those carrying out main food shopping on the day of the survey, 60% were shopping at the Co-op and 12% at Booths. Over a third were visiting the butcher (some in addition to the supermarket), while the remainder were patronising unnamed local shops. It should be noted that – quite intentionally - all the interviews were carried out in the town centre itself. Clearly, if a proportion had been conducted outside the Booths store, there would have been a different level of response (as evidenced by the following question), but the intention was to capture those who were using the traditional town centre for a variety of purposes.

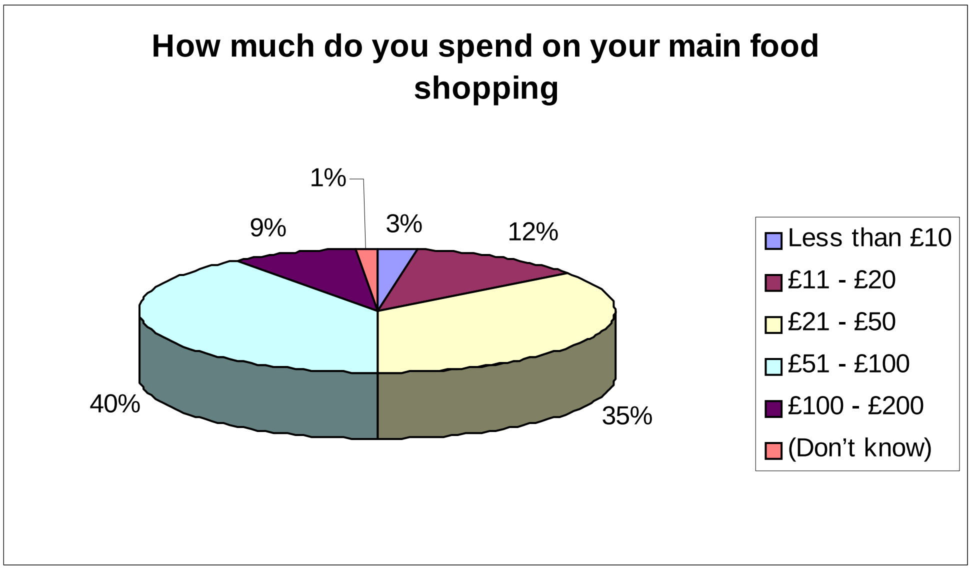
Question Six – Where do you usually do your main food shopping?



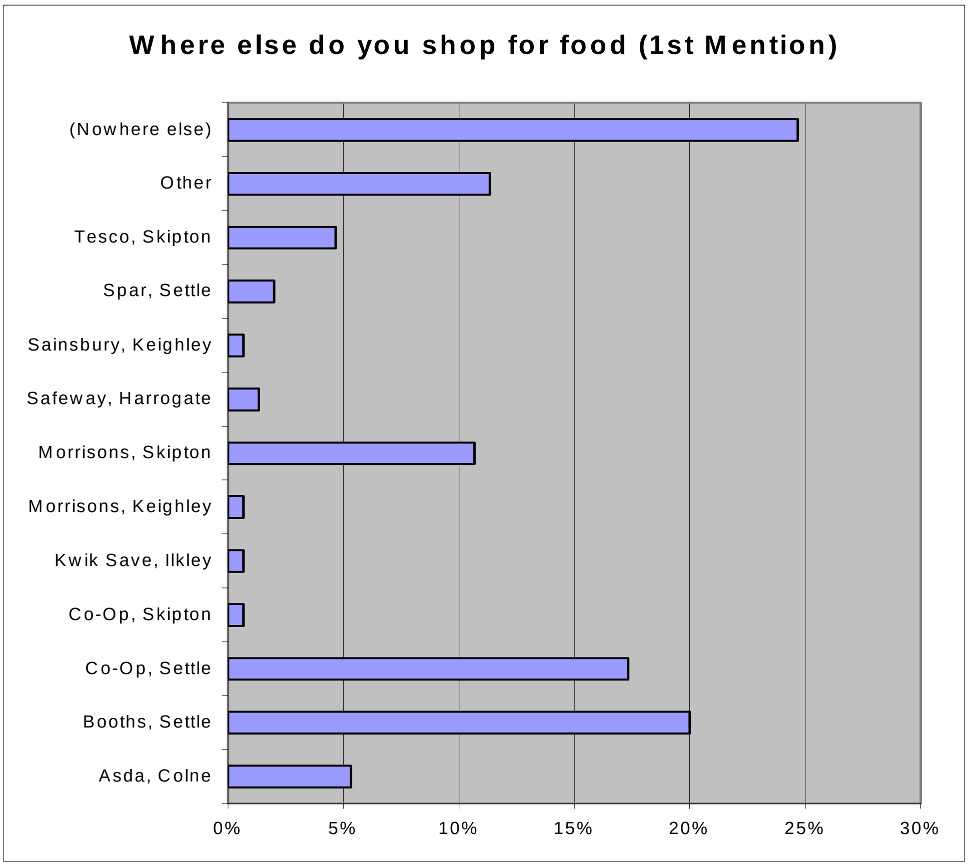
Question Seven – How often do you do your main food shopping?



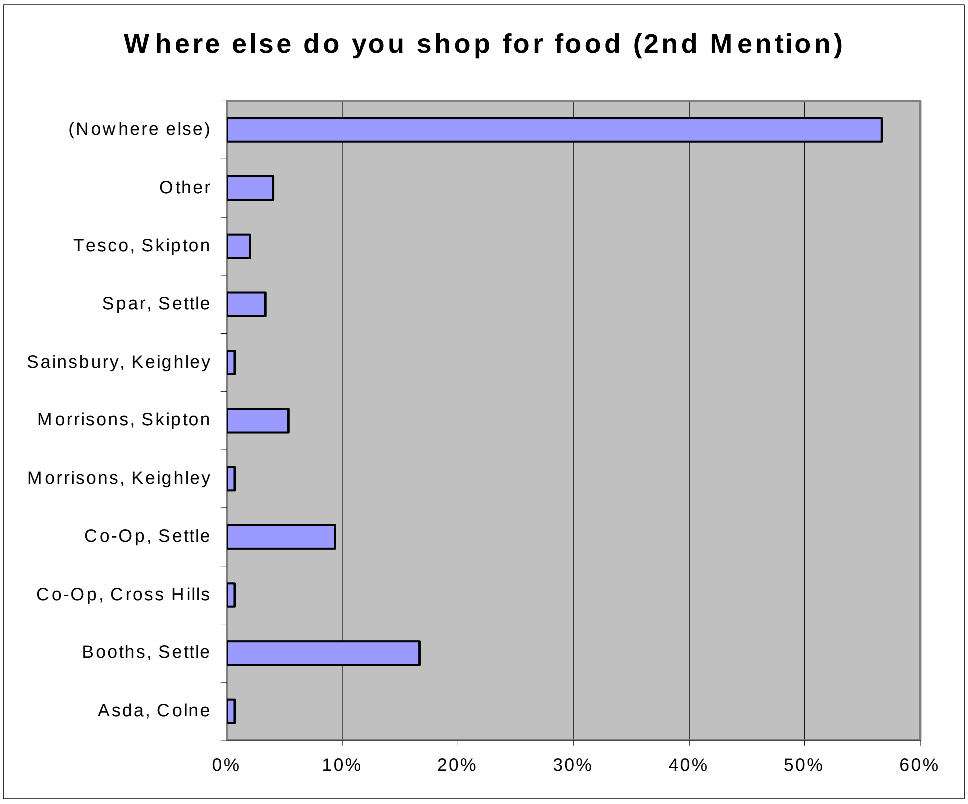
Question Eight - How much do you spend per week on your main food shopping ?



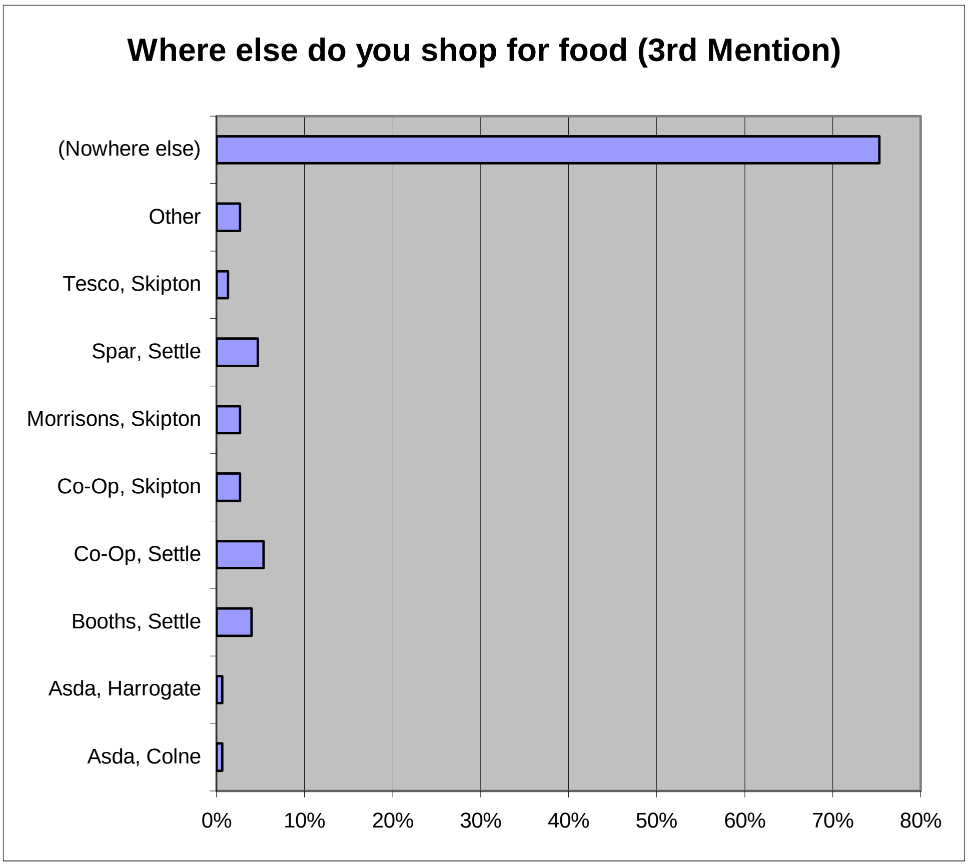
Question Nine – Where else do you shop for food? (1st Mention)



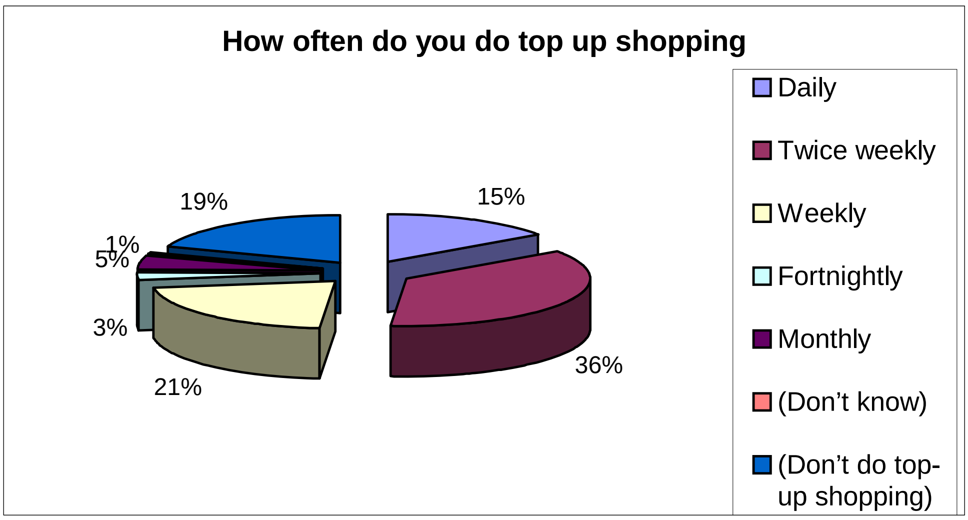
2nd Mention


Where else do you shop for food (2nd Mention)
(Nowhere else)
Other
Tesco, Skipton
Spar, Settle
Sainsbury, Keighley
Morrisons, Skipton
Morrisons, Keighley
Co-Op, Settle
Co-Op, Cross Hills
Booths, Settle
Asda, Colne
0%
10%
20%
30%
40%
50%
60%

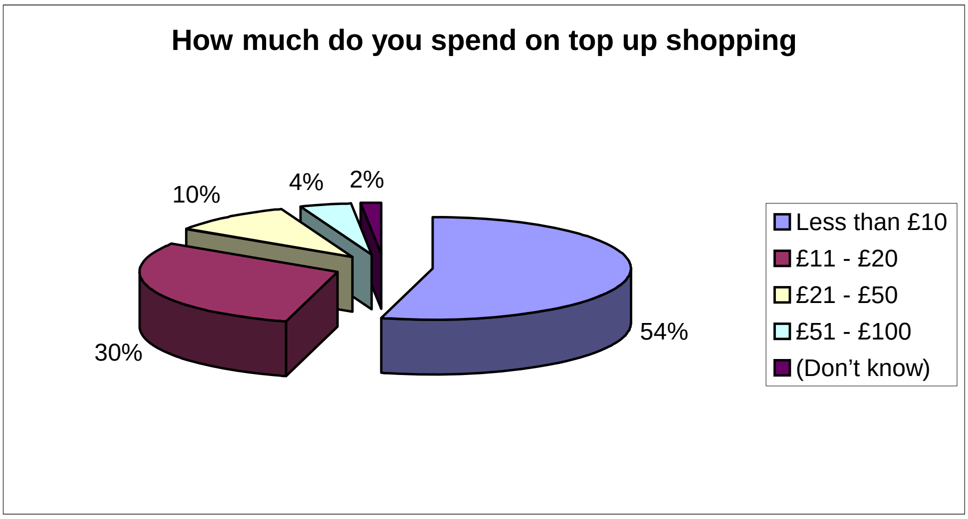
3rd Mention



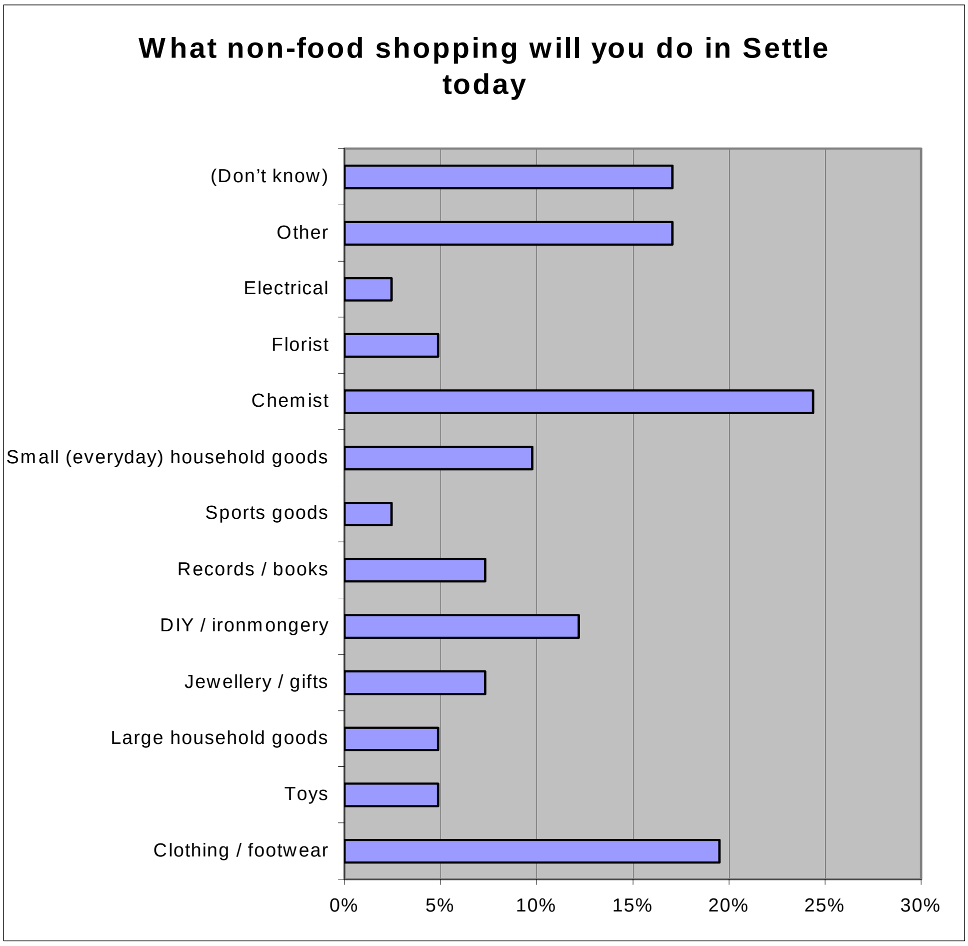
Question Ten – How often do you do top up food shopping?



Question Eleven - How much do you spend per week on top up food shopping?

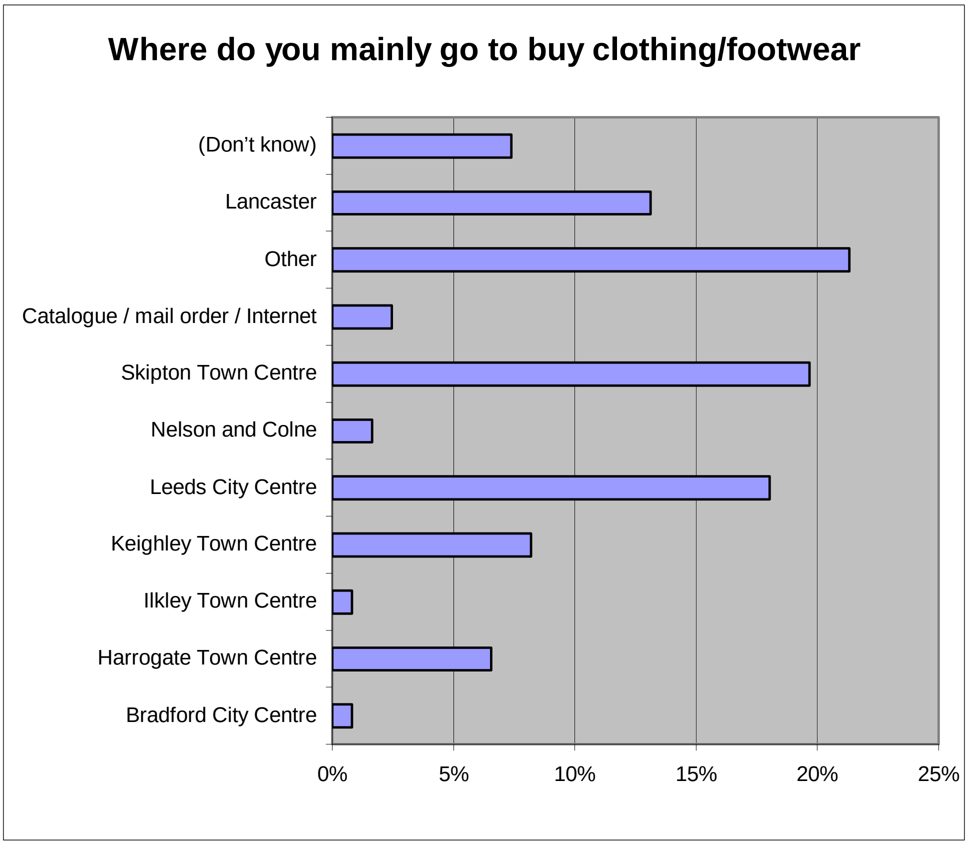


Question Twelve – Which of these types of non-food shopping will you do in Settle town centre?

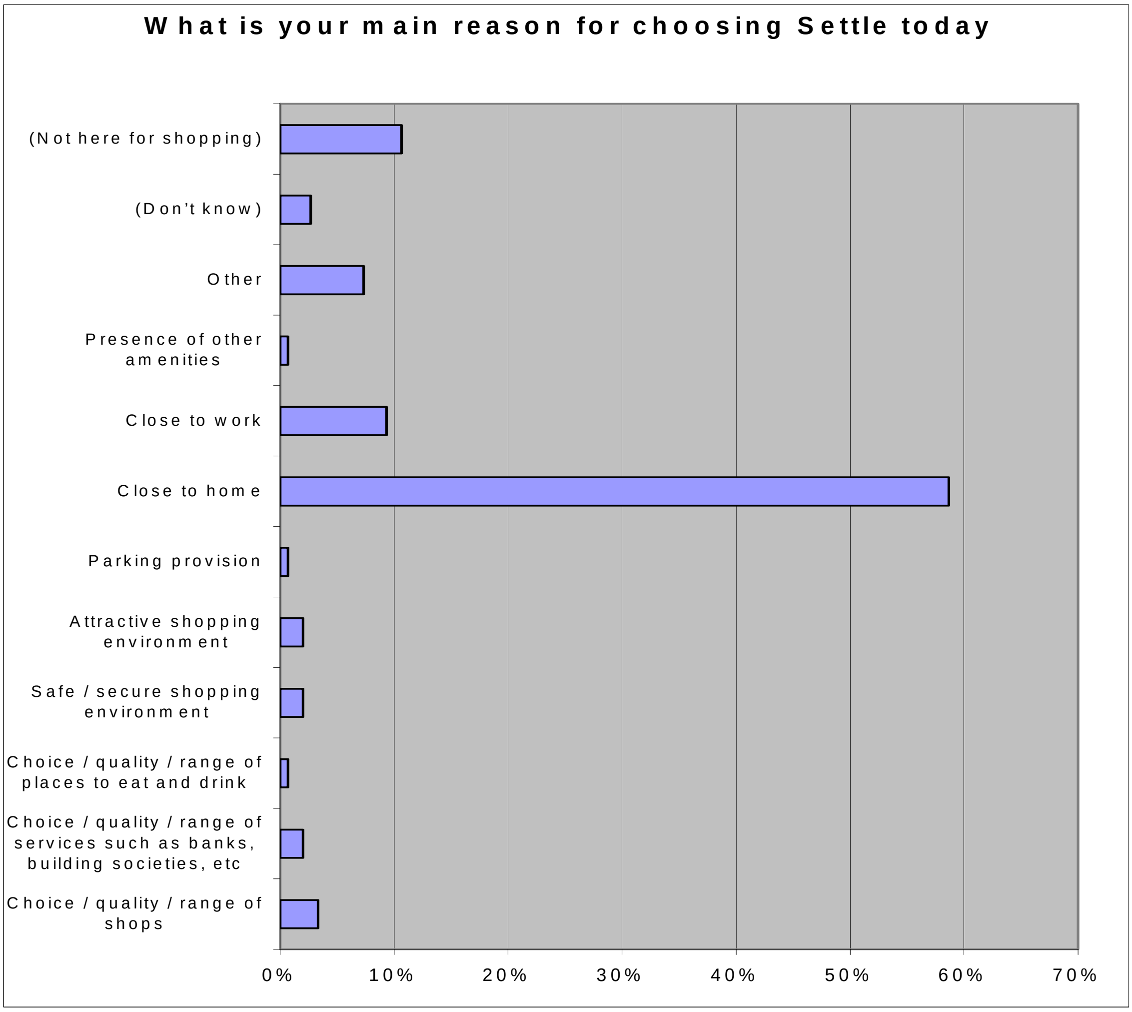


Question Thirteen – Is Settle town centre your main centre for clothes/footwear shopping?

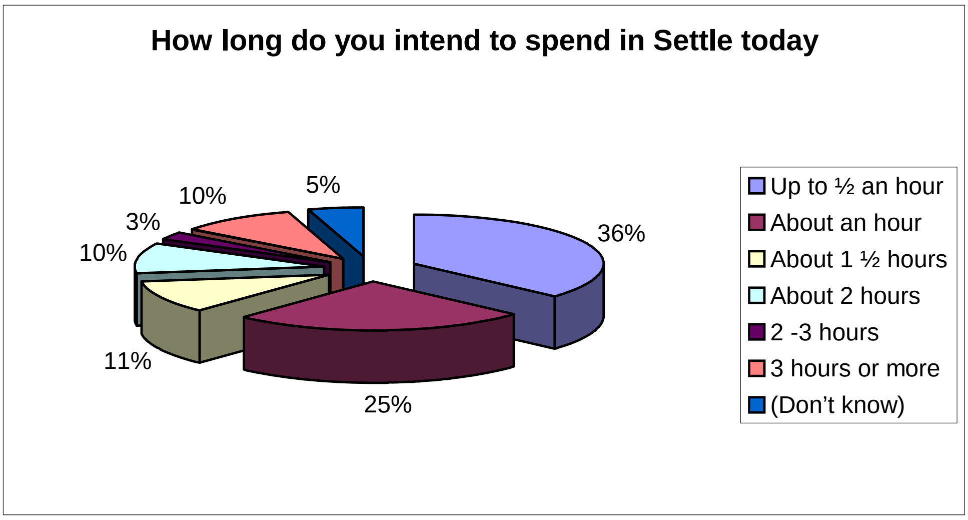
Question Fourteen - Where do you usually go to buy clothes/footwear?



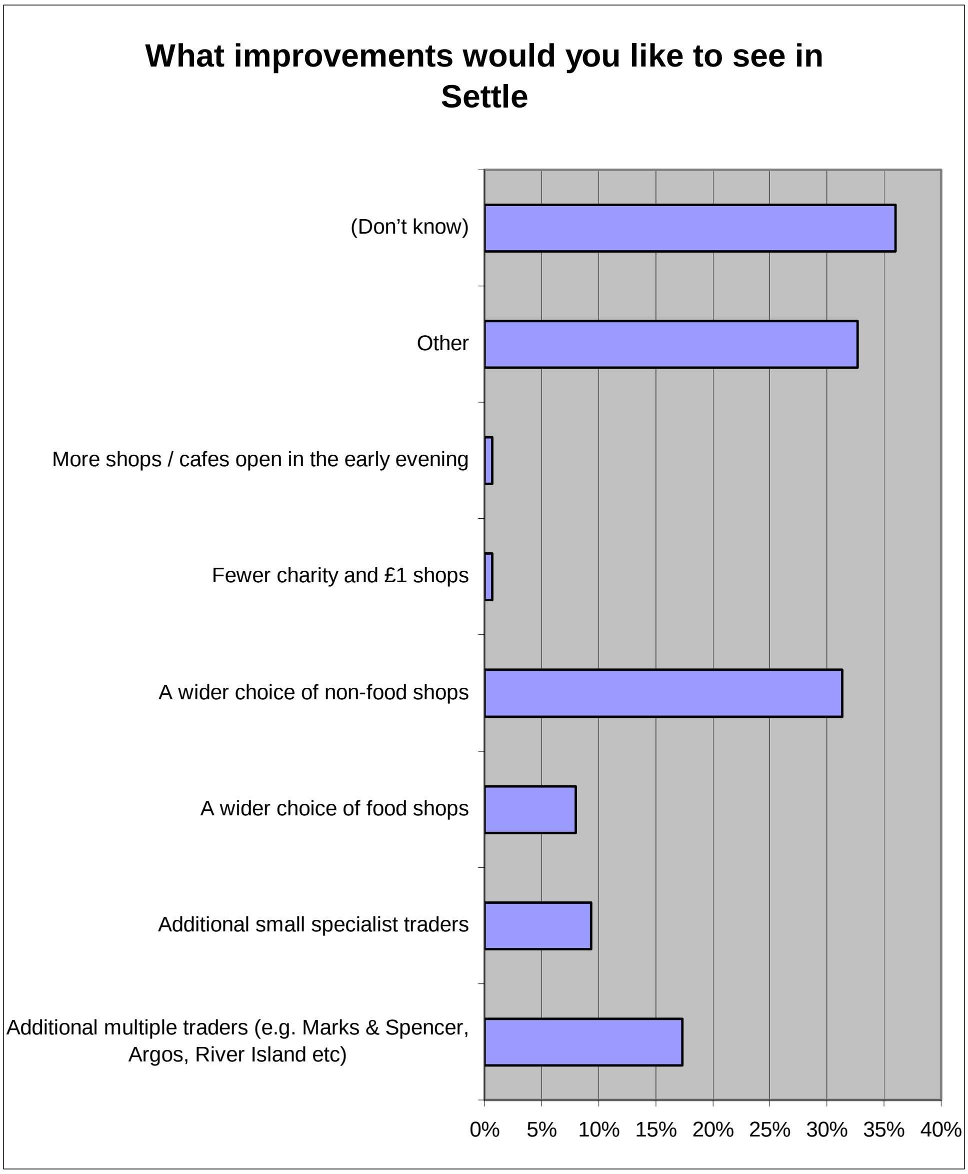
Question Fifteen – What is the main reason for choosing Settle town centre for a shopping trip?



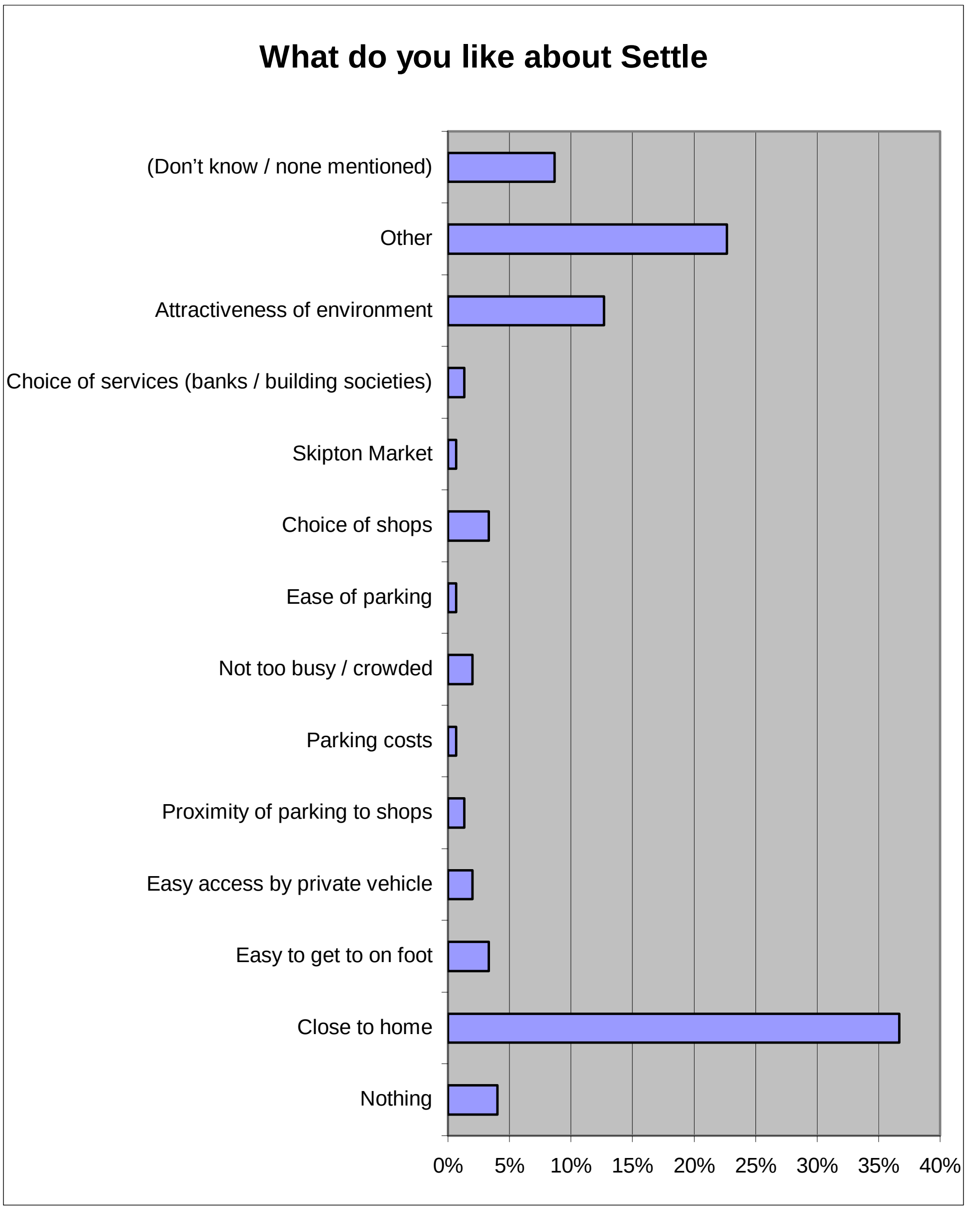
Question Sixteen – How long do you intend to spend in Settle town centre today?



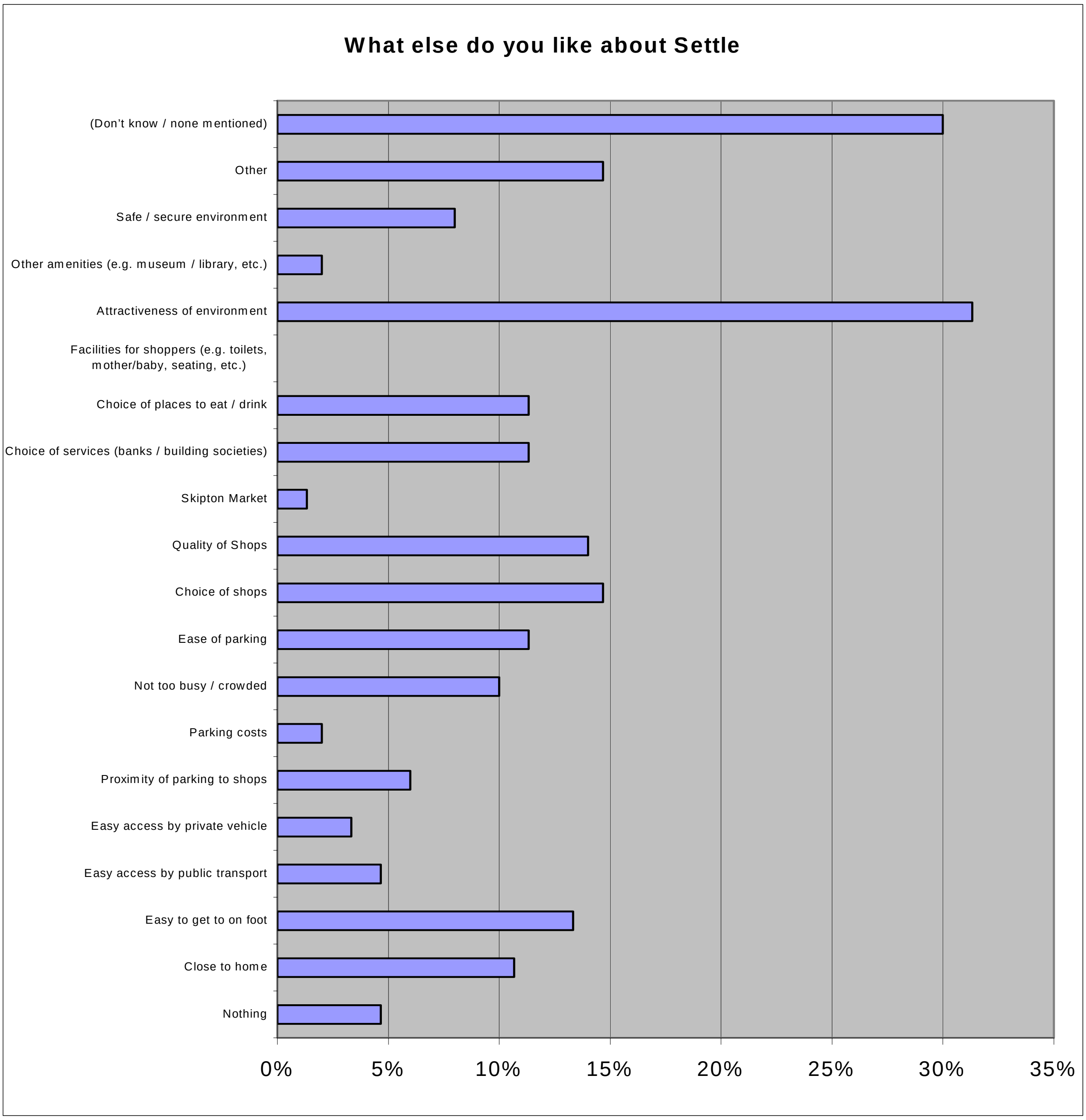
Question Seventeen - What improvements, if any, would you like to see to the shopping facilities in Settle Town Centre?



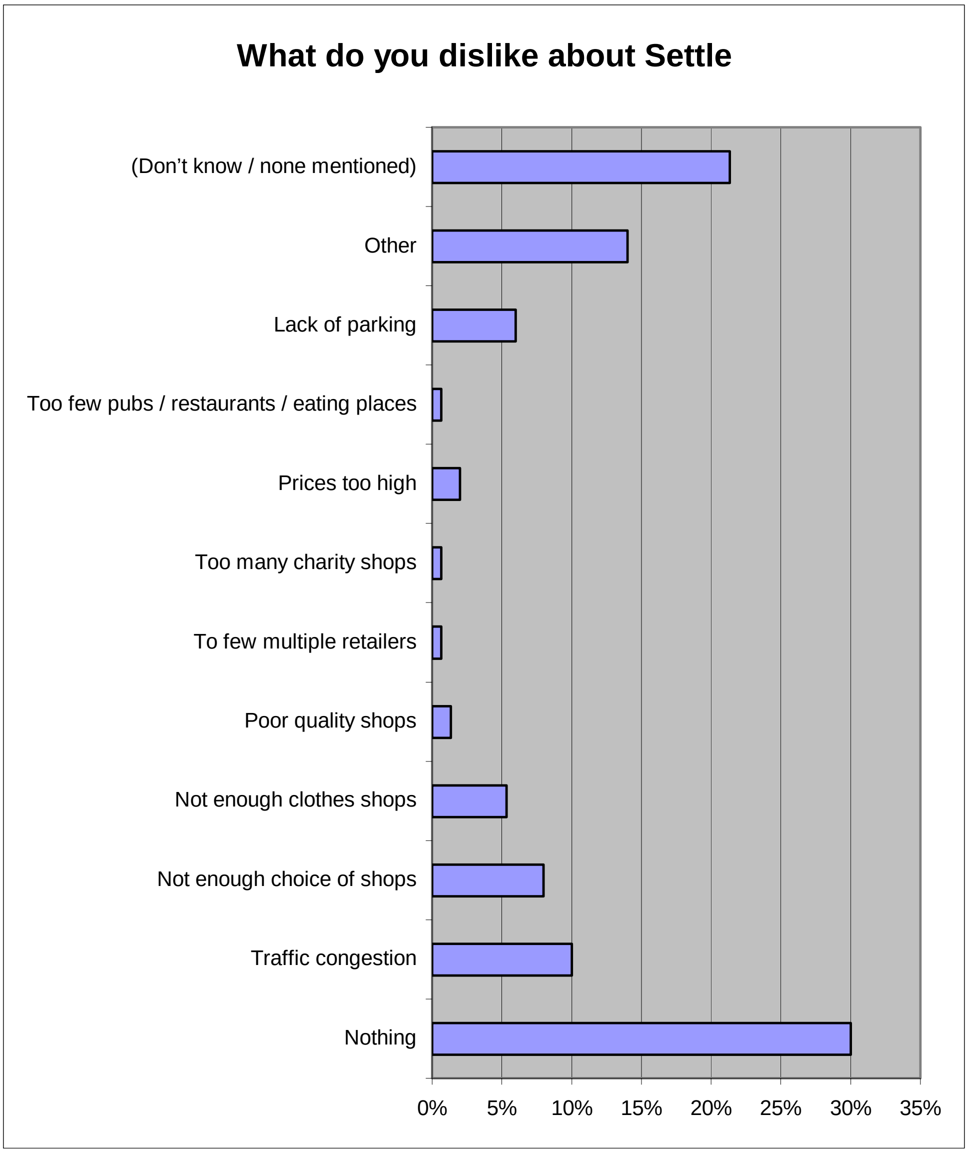
Question Eighteen - Please state what you particularly like about Settle Town Centre?



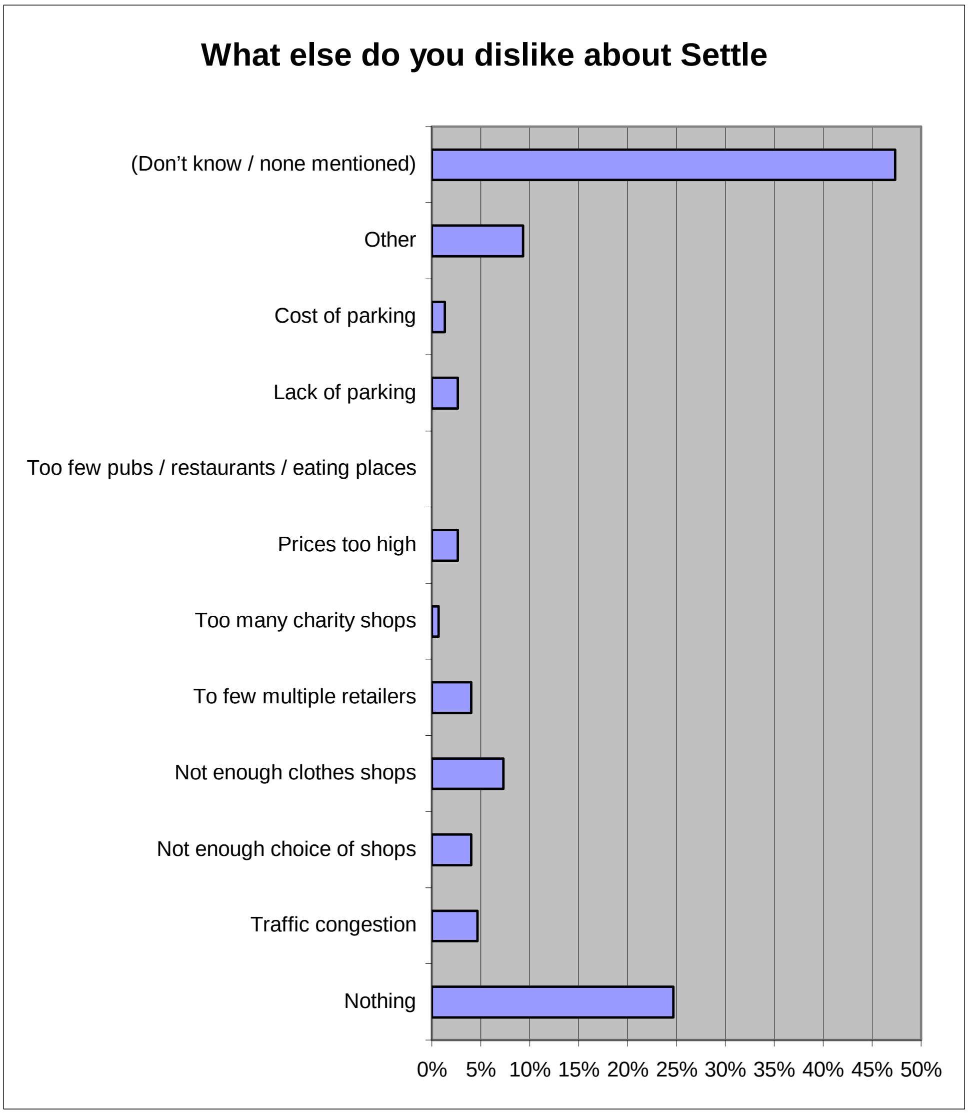
Question Nineteen - What else do you like about Settle Town Centre?



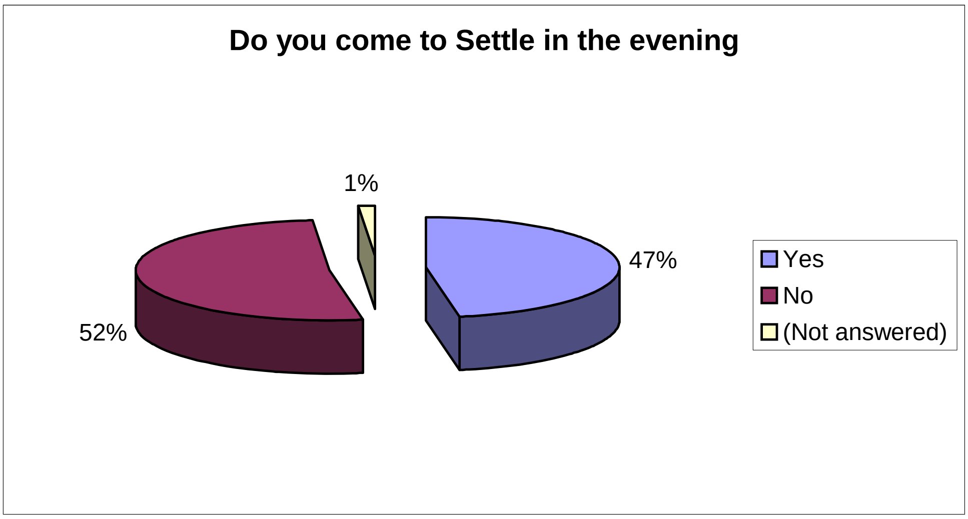
Question Twenty - What do you particularly dislike about Settle Town Centre?



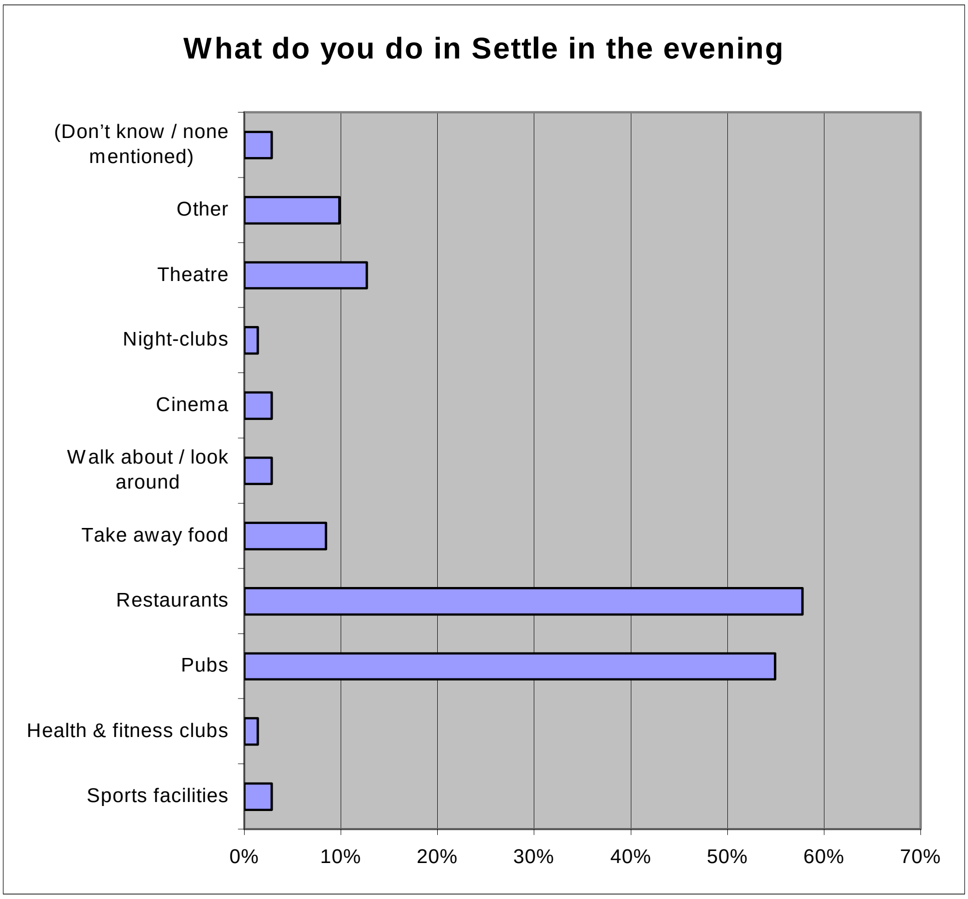
Question Twenty One - What else do you particularly dislike about Settle Town Centre?



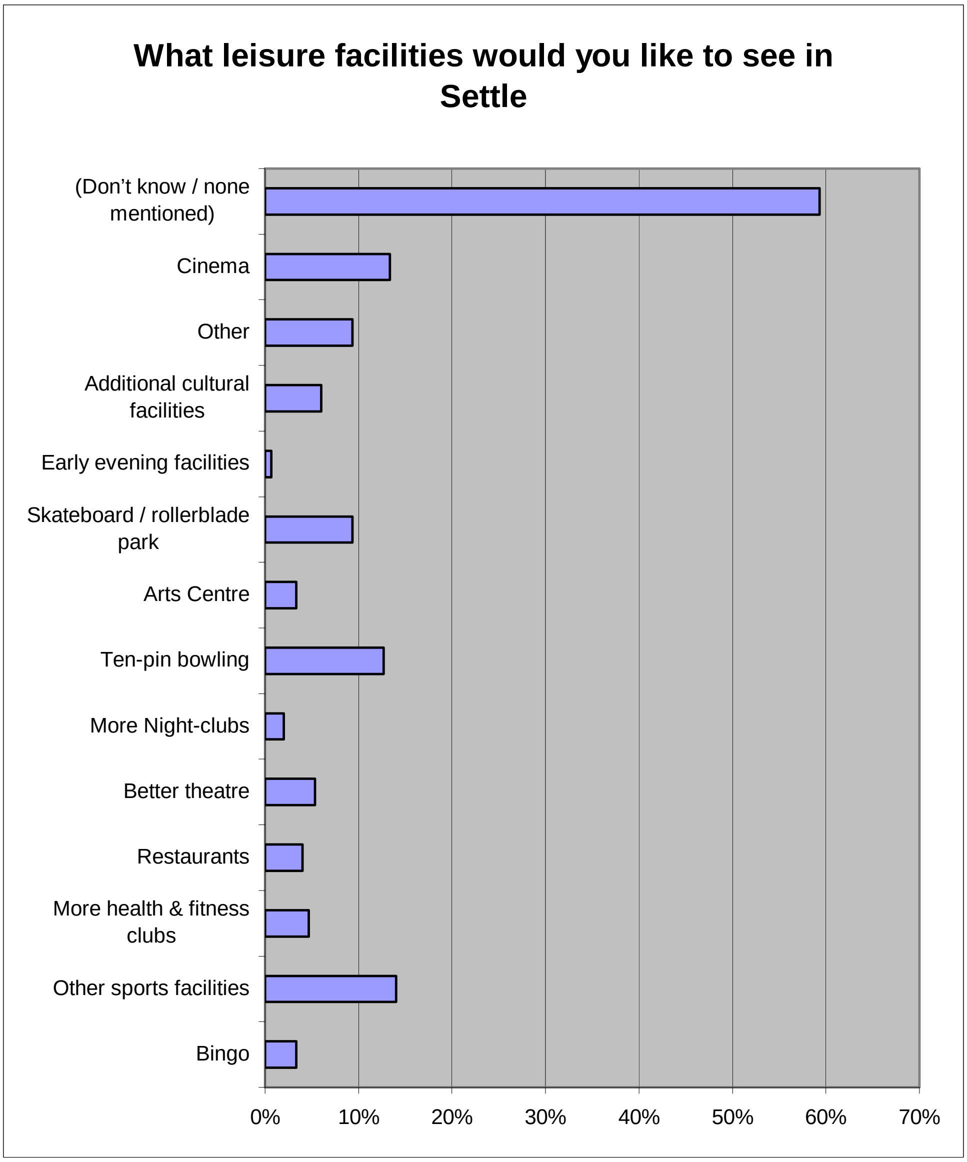
Question Twenty Two - Do you ever come to Settle Town Centre in the evenings?



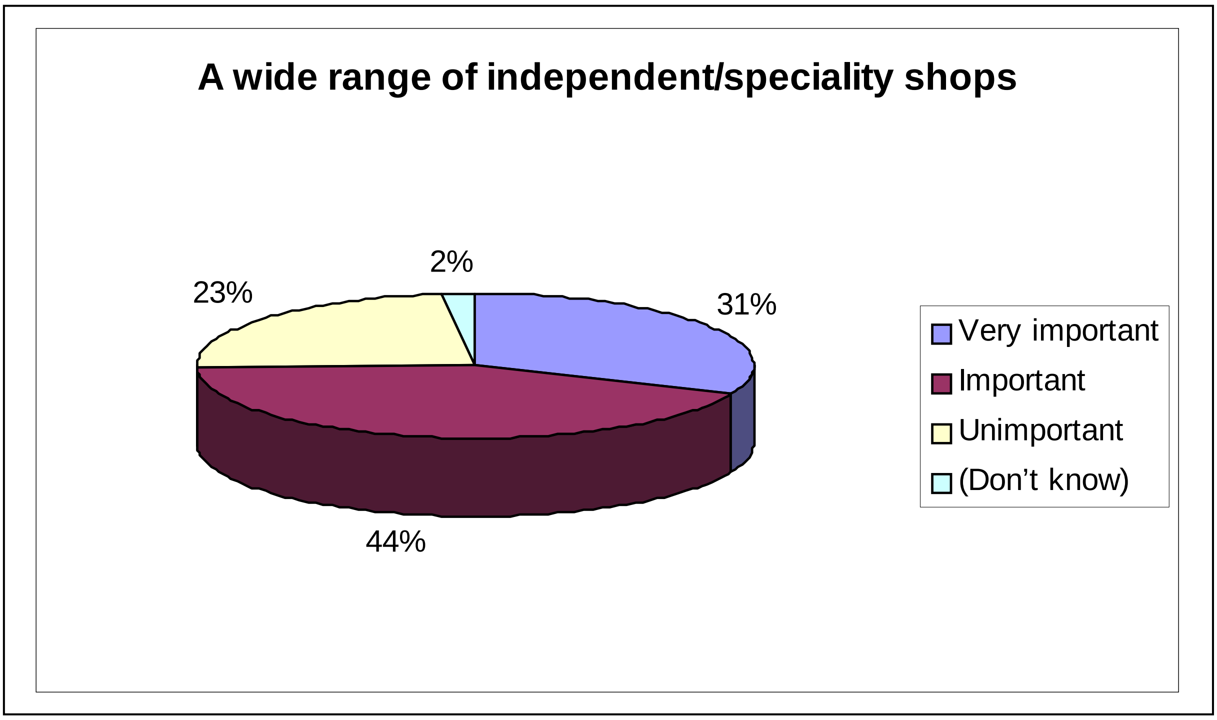
Question Twenty Three - What do you do in Settle Town Centre in the evening?

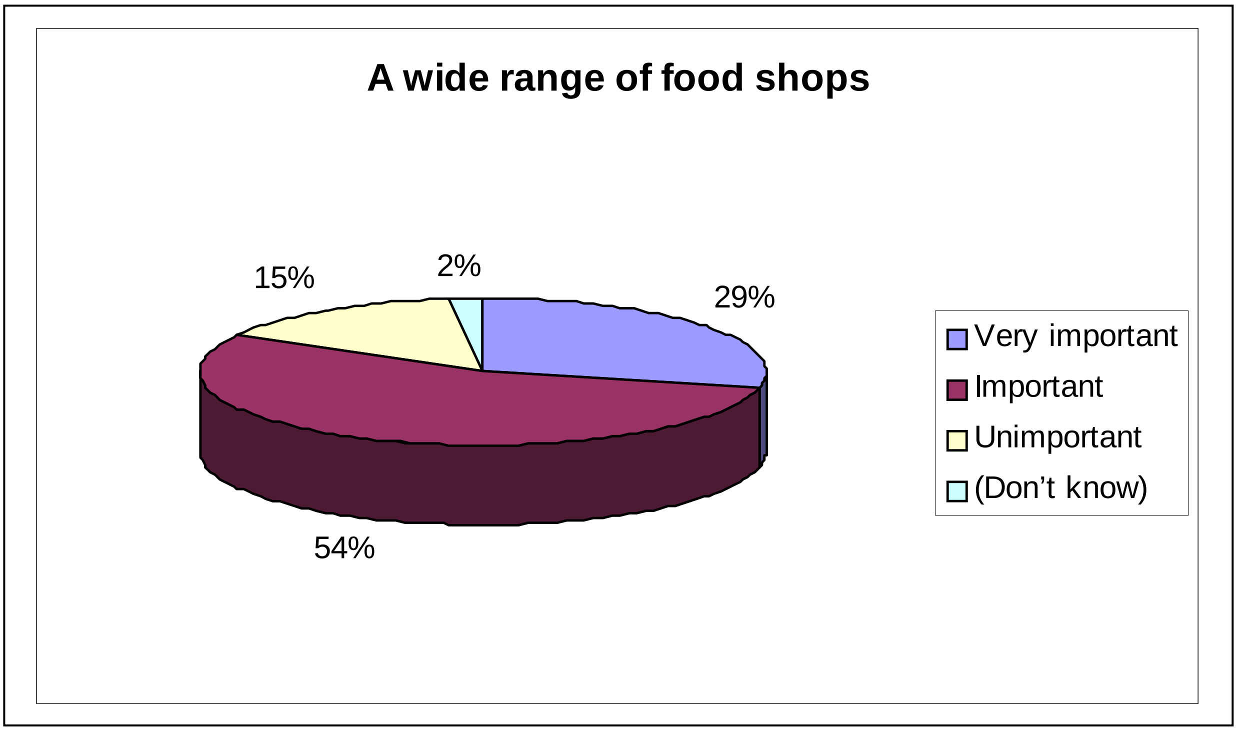


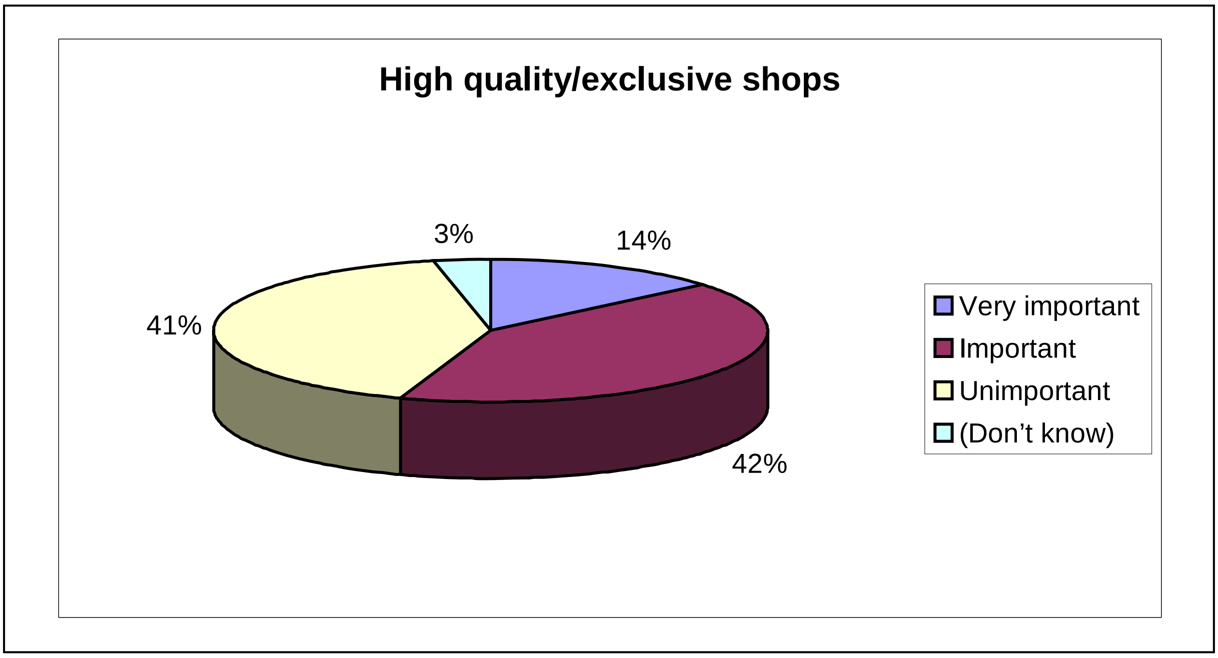
Question Twenty Four - What leisure facilities would you like to see in Settle Town Centre?

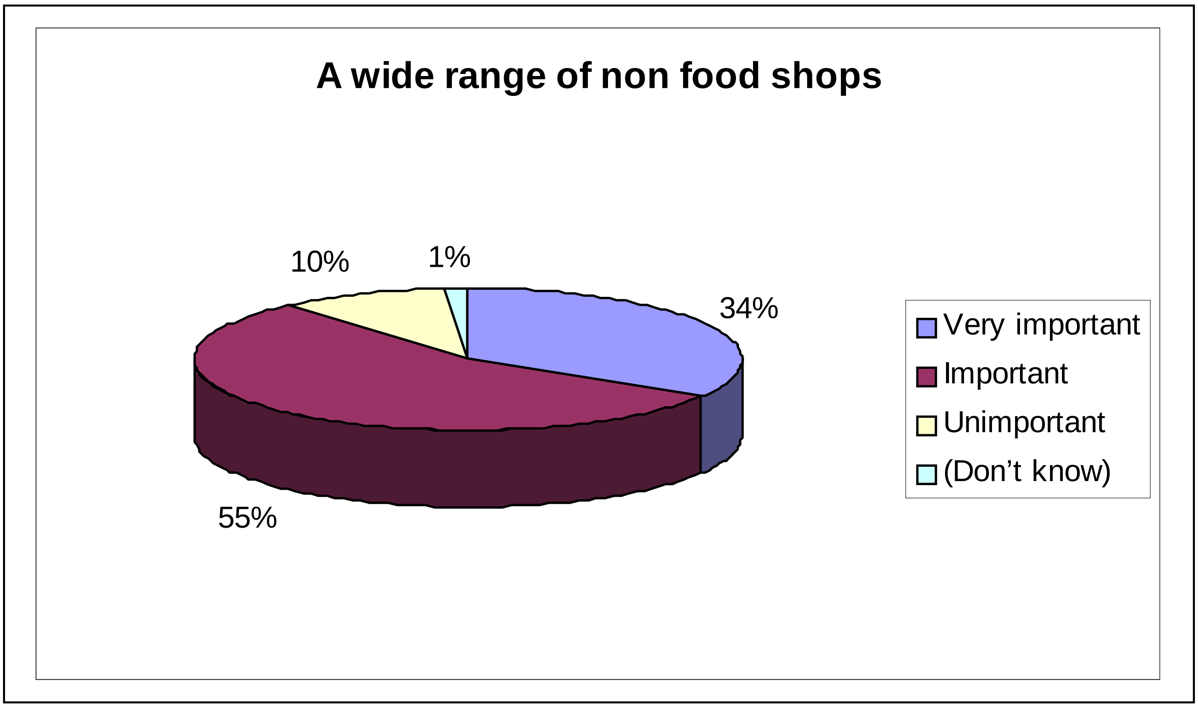


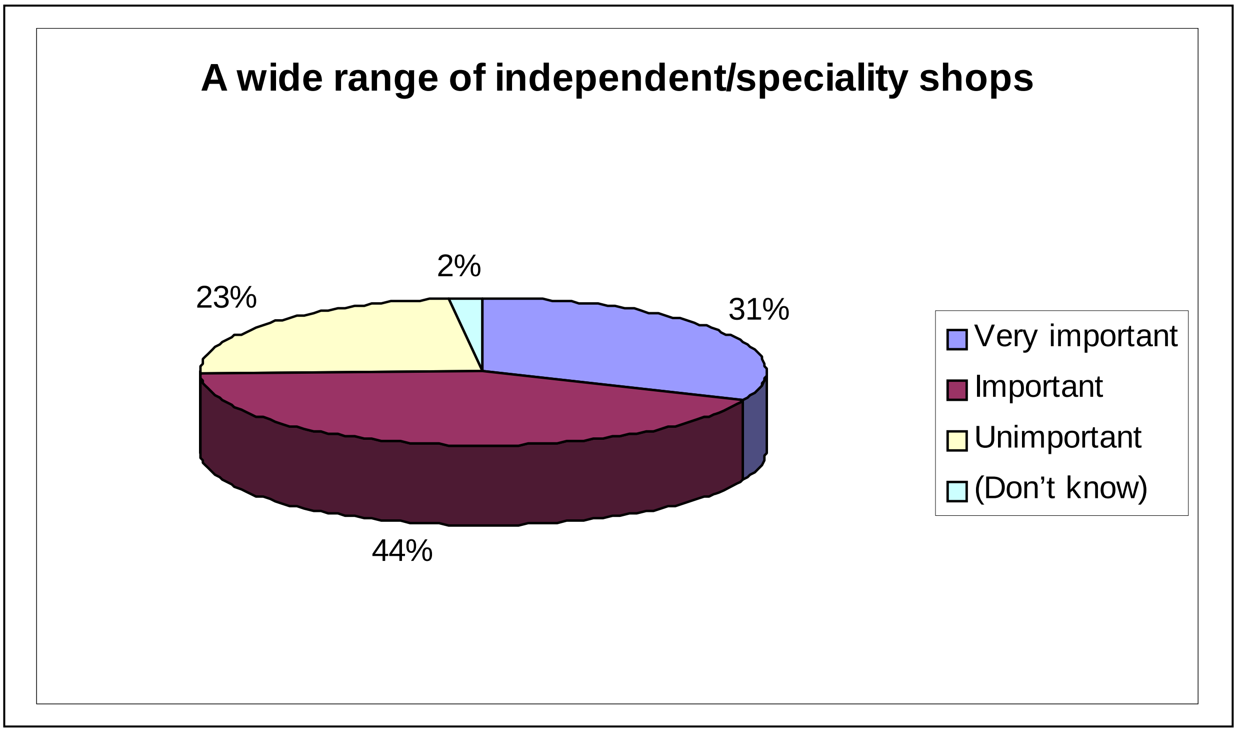
Question Twenty Five - How important are the following amenities to you in creating an attractive town centre ?

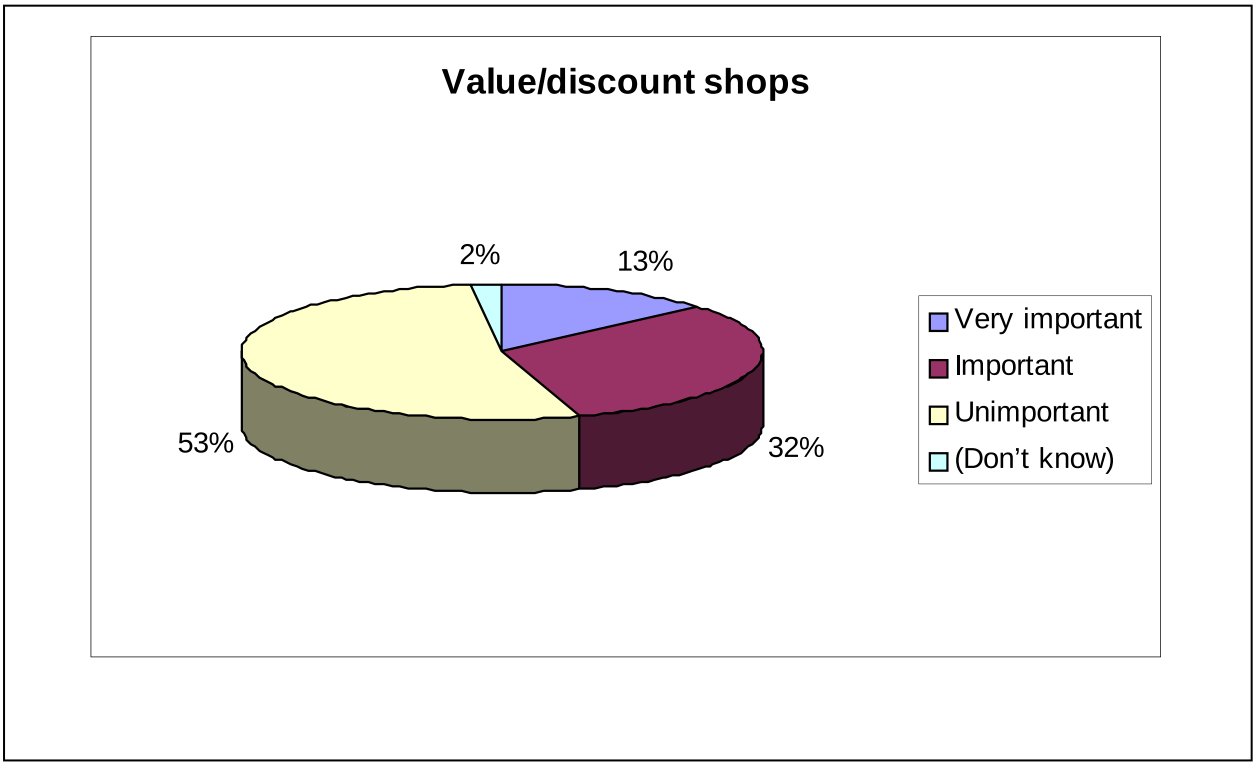


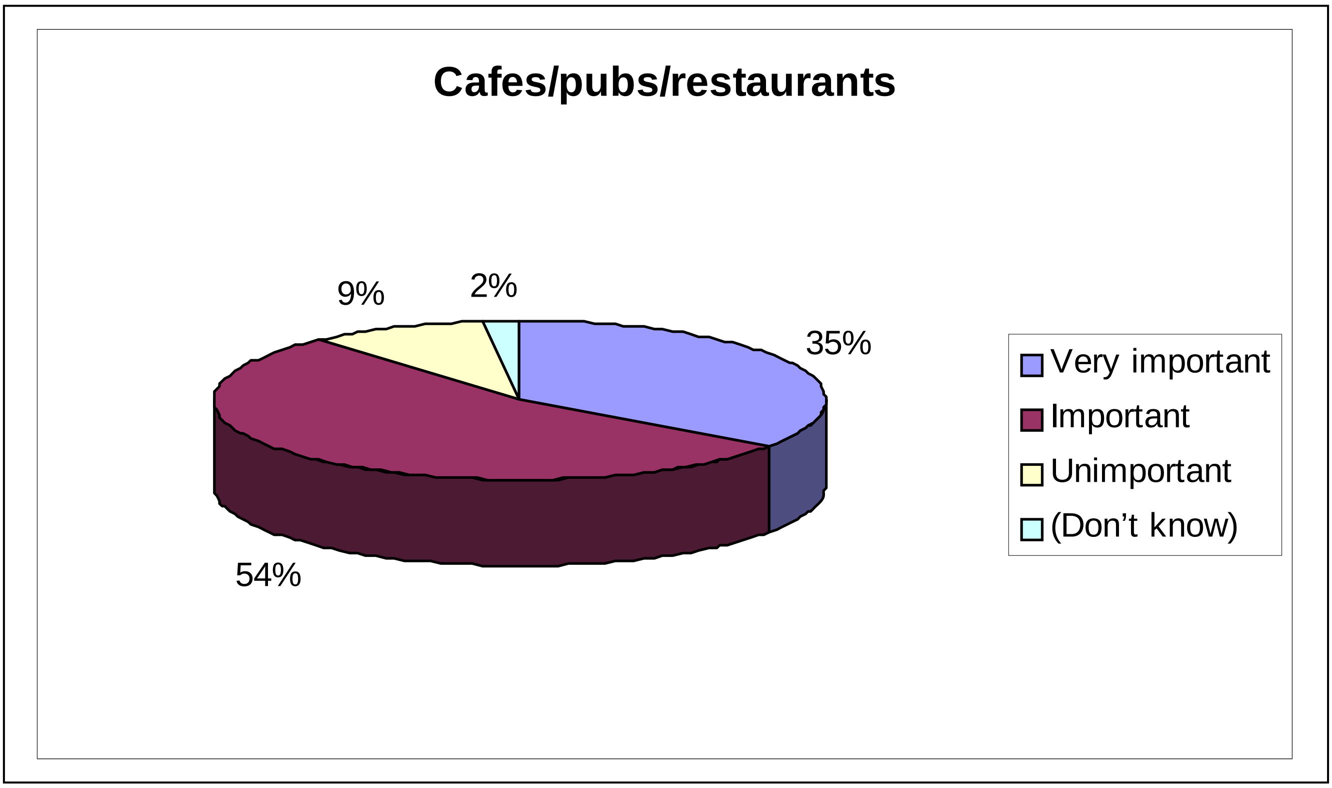


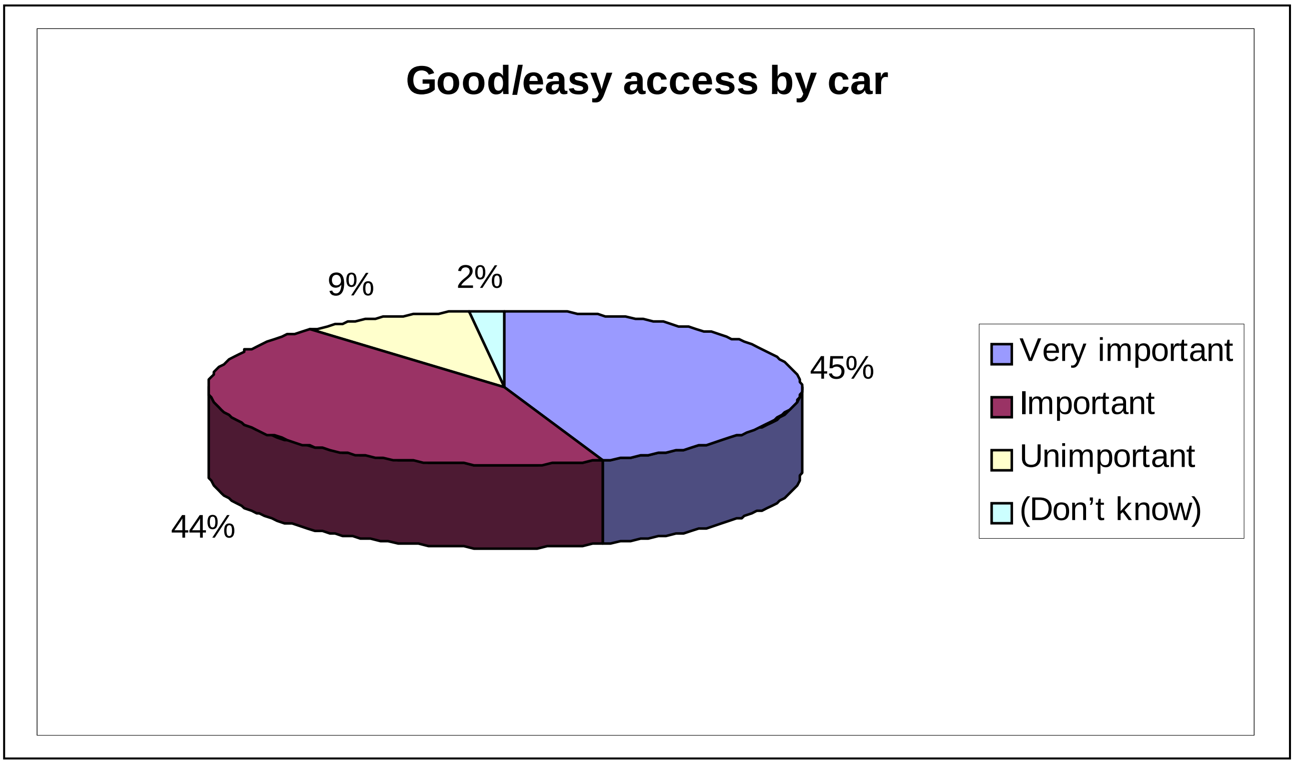

High quality/exclusive shops
3%
14%
41%
42%
Very important
Important
Unimportant
(Don't know)

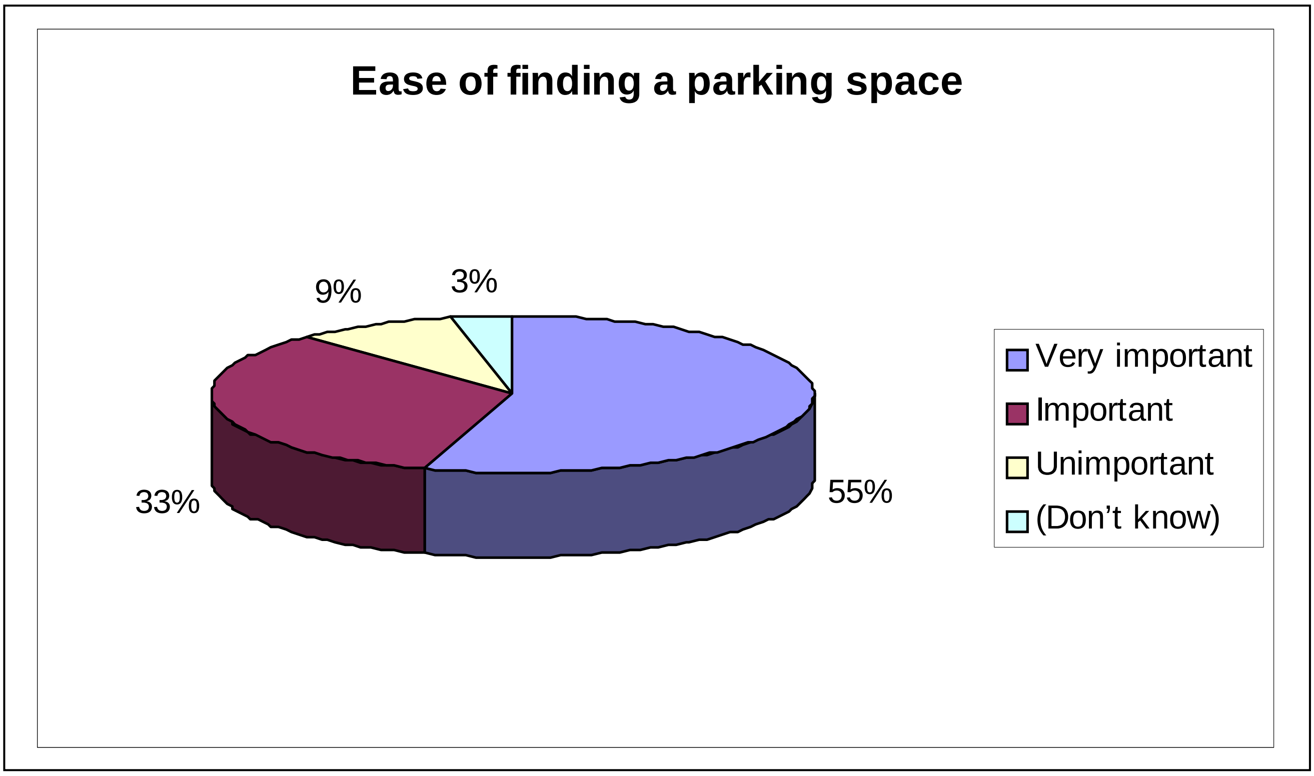

A wide range of non food shops
10%
1%
34%
55%
Very important
Important
Unimportant
(Don't know)

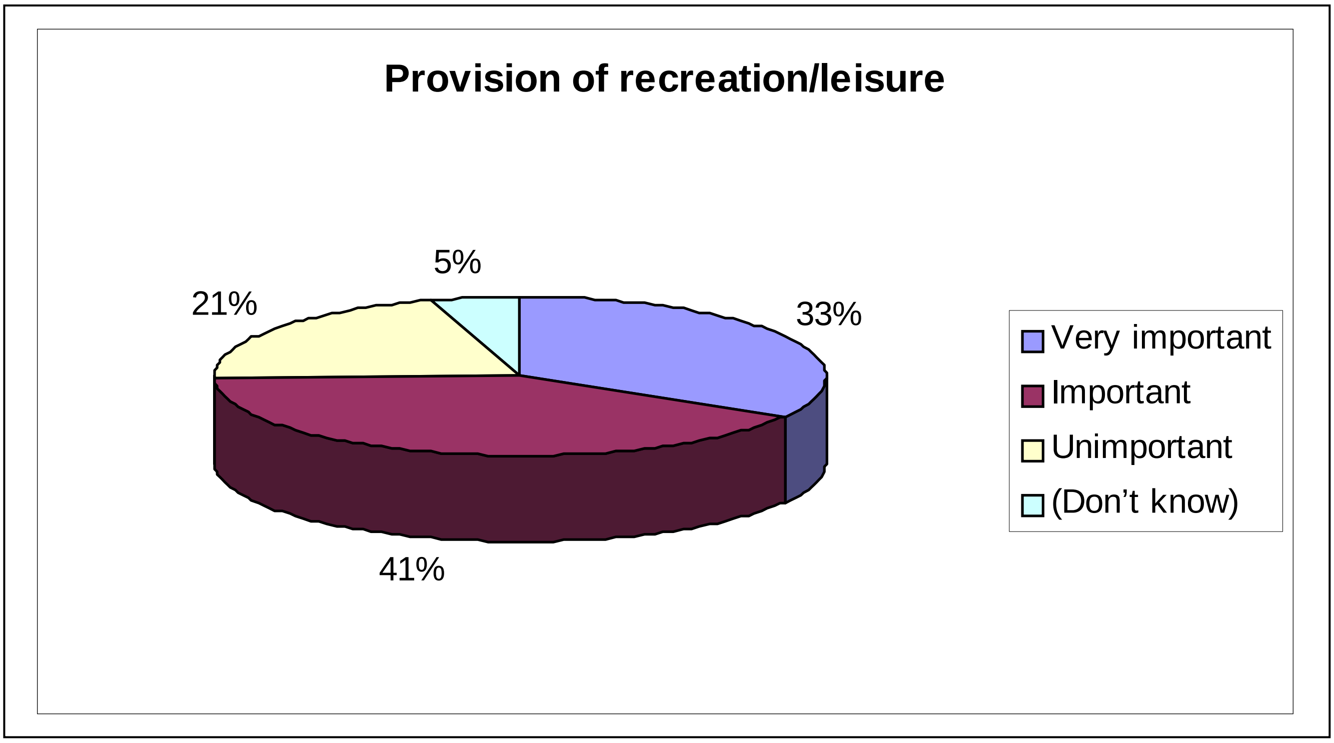

A wide range of independent/speciality shops
2%
23%
31%
44%
Very important
Important
Unimportant
(Don’t know)

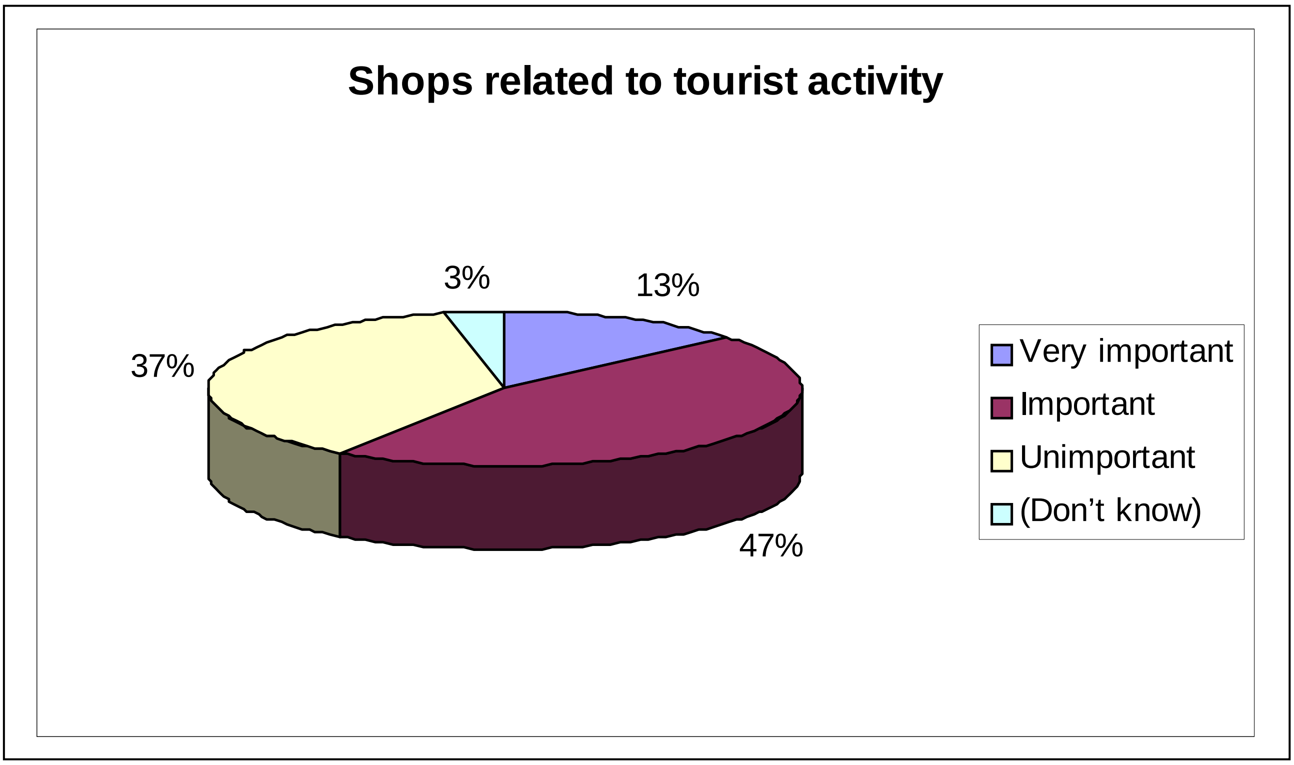

Value/discount shops
2%
13%
53%
32%
Very important
Important
Unimportant
(Don’t know)

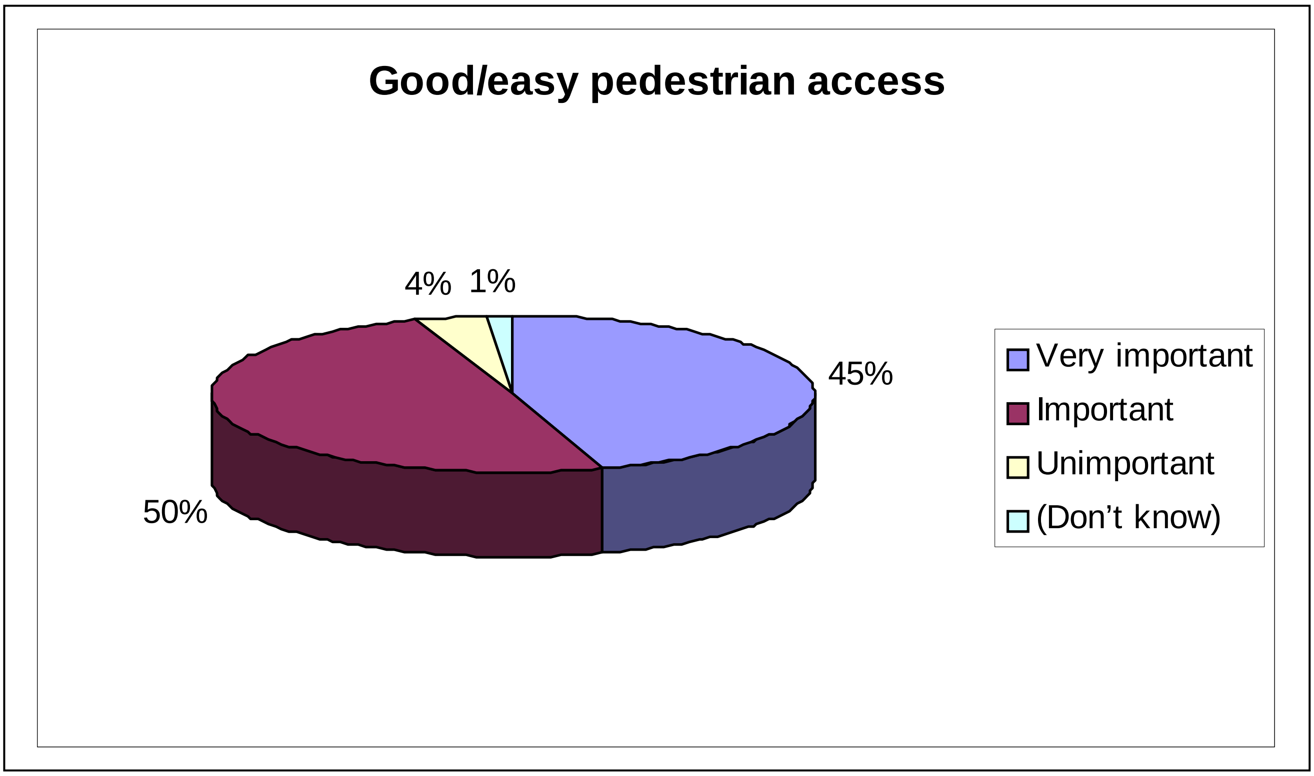

Cafes/pubs/restaurants
9%
2%
35%
54%
Very important
Important
Unimportant
(Don't know)

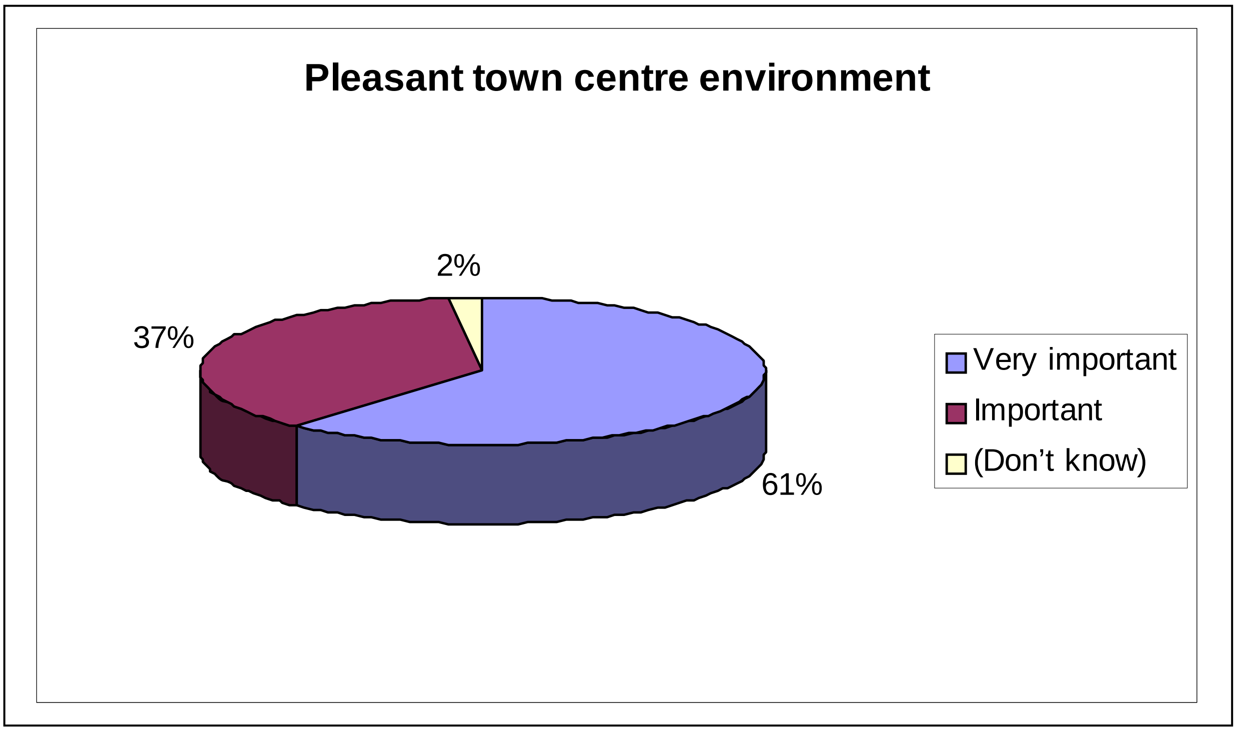

Good/easy access by car
9%
2%
45%
44%
Very important
Important
Unimportant
(Don't know)

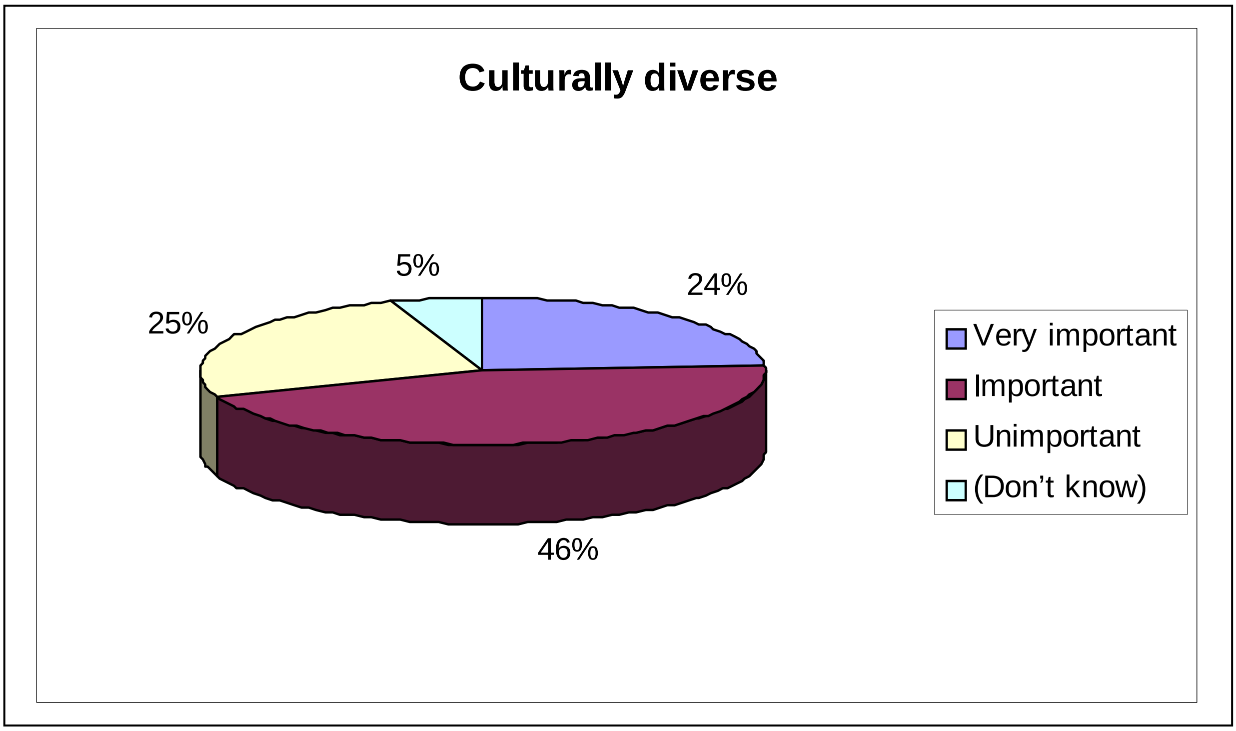

Ease of finding a parking space
9%
3%
33%
55%
Very important
Important
Unimportant
(Don't know)

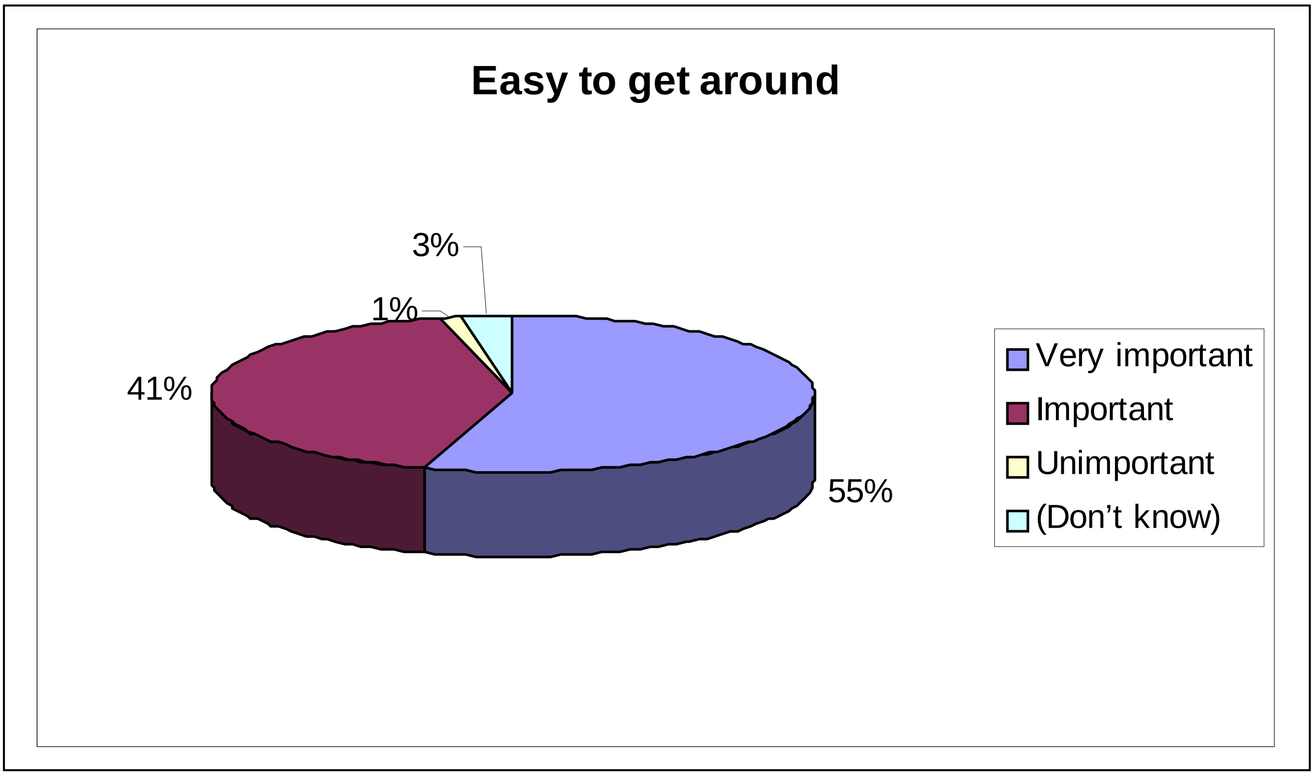

Provision of recreation/leisure
5%
21%
33%
41%
Very important
Important
Unimportant
(Don't know)

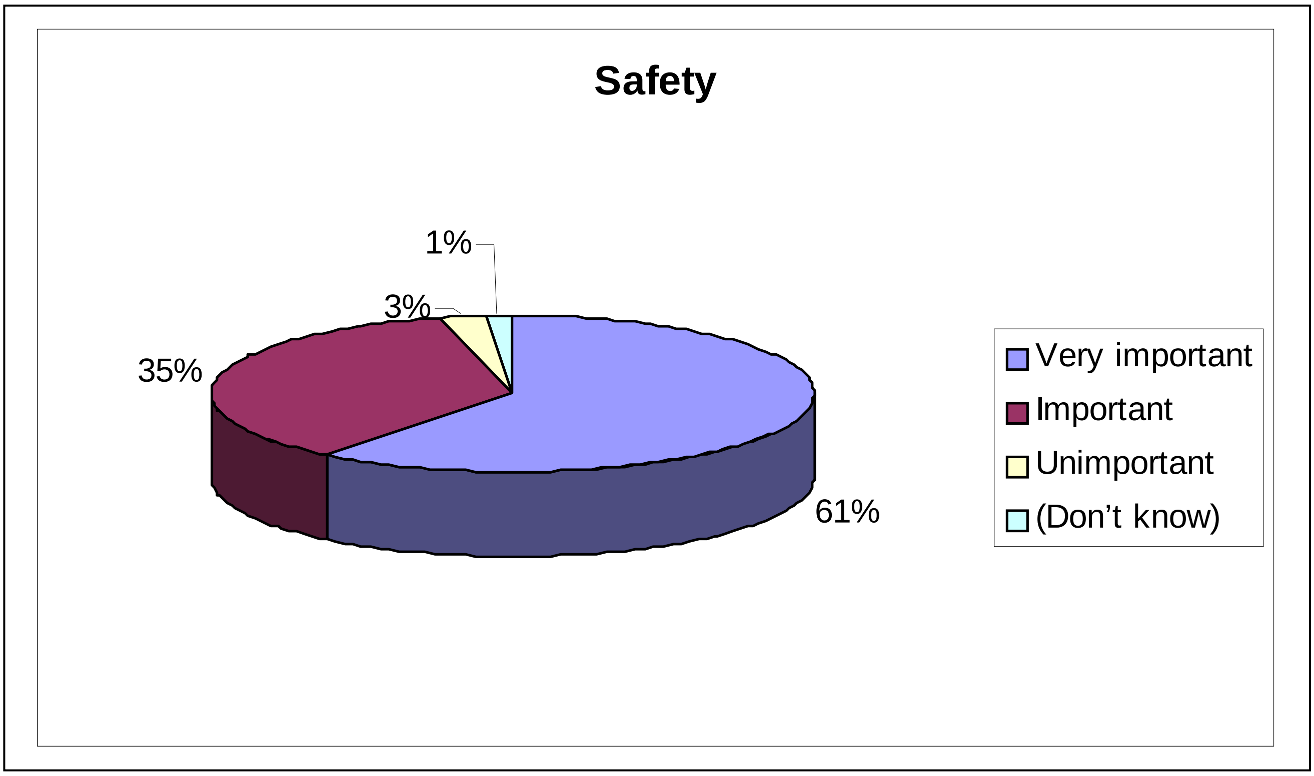

Shops related to tourist activity
3%
13%
37%
47%
Very important
Important
Unimportant
(Don't know)

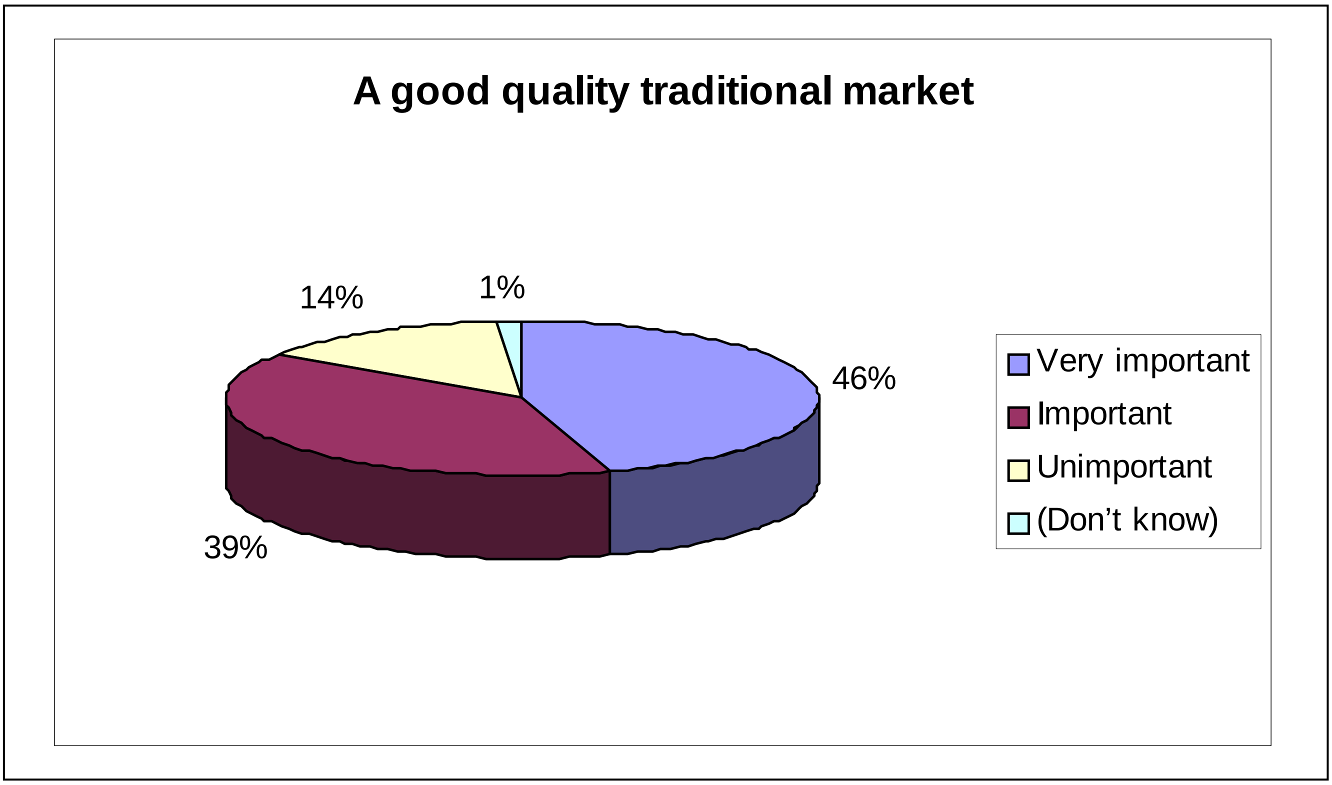

Good/easy pedestrian access
4%
1%
45%
50%
Very important
Important
Unimportant
(Don't know)


Pleasant town centre environment
2%
37%
61%
Very important
Important
(Don't know)

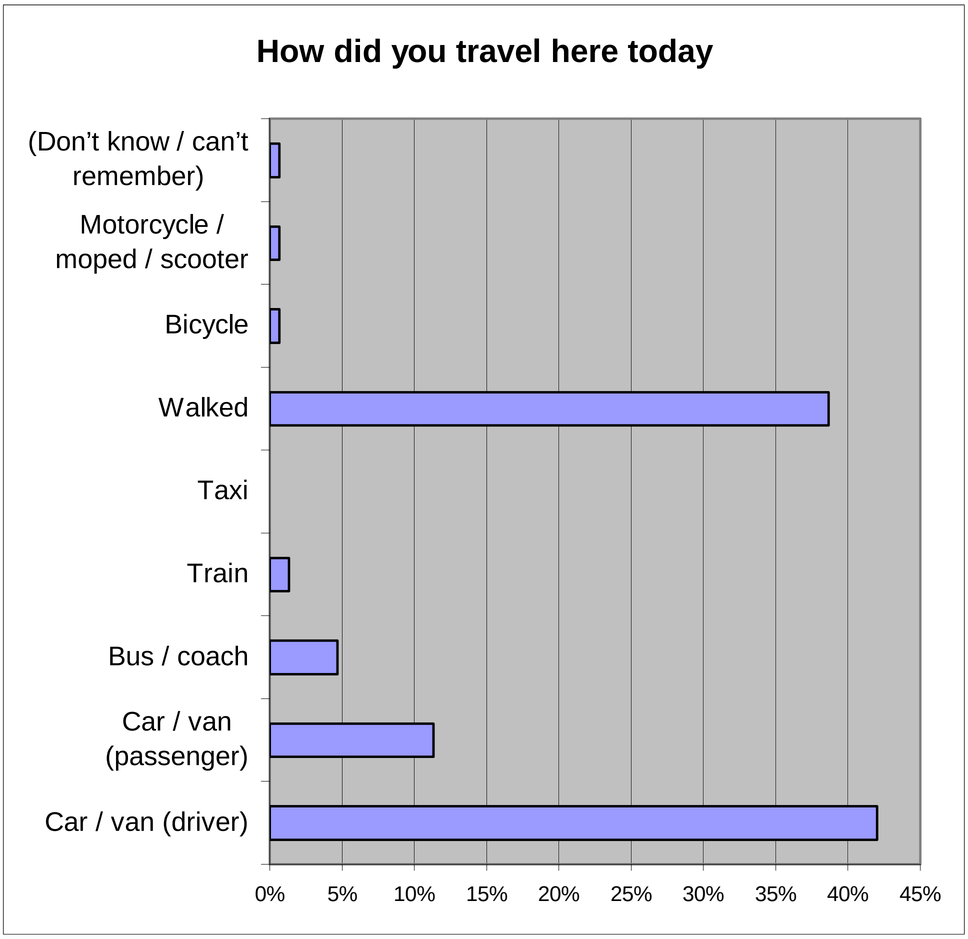

Culturally diverse
5%
24%
25%
46%
Very important
Important
Unimportant
(Don't know)


Easy to get around
3%
1%
41%
55%
Very important
Important
Unimportant
(Don't know)


Safety
1%
3%
35%
61%
Very important
Important
Unimportant
(Don't know)


A good quality traditional market
14%
1%
46%
39%
Very important
Important
Unimportant
(Don't know)

Question Twenty Six - How did you travel here today?



Signed: **Date:**

Name: **Position:**

For and on behalf of Donaldsons

St Paul's House
23 Park Square South
Leeds
LS1 2ND

48 Warwick Street, London W1B 5NL
Tel: +44(0)20 7534 5000 Fax: +44(0)20 7434 0045
www.donaldsons.co.uk
enquiries@donaldsons.co.uk

Donaldsons Offices

Birmingham
120 Edmund Street, Birmingham,
B3 2ED
Tel: +44 (0)121 212 1090
Fax: +44 (0)121 212 1099

Cheltenham
Vittoria House, Vittoria Walk, Cheltenham,
GL50 1TW
Tel: +44 (0)1242 521 102
Fax: +44 (0)1242 221 754

Leeds
St Paul's House, 23 Park Square South,
Leeds, LS1 2ND
Tel: +44 (0)113 246 1161
Fax: +44 (0)113 244 1637

Bristol
Beech House, 6 St.Paul's Road, Clifton,
Bristol, BS8 1LT
Tel: +44 (0)117 923 9520
Fax: +44 (0)117 923 9521

Edinburgh
9 Hope Street, Edinburgh,
EH2 4EL
Tel: +44 (0)131 260 7300
Fax: +44 (0)131 225 8970

Manchester
Century House, 11 St.Peter's Square,
Manchester, M2 3DN
Tel: +44 (0)161 237 9977
Fax: +44 (0)161 237 3311

Glasgow
90 St.Vincent Street, Glasgow, G2 5UQ
Tel: +44 (0)141 221 2871
Fax: +44 (0)141 221 1099

In association with
Donaldsons Portugal
Rua São João da Mata 37-39, Piso 1°,
1200 - 846 Lisboa, Portugal
Tel: +35 121 396 3696
Fax: +35 121 396 3703
