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CRAVEN DISTRICT COUNCIL

# Craven's Smaller Centres
# Cross Hills Health Check

## Report



## Appendices

## GLOSSARY

| | | |
|---|---|---|
| **GIS** | **-** | **Geographic Information System** |
| **ITZA** | **-** | **In Terms of Zone A** |
| **SQ.FT** | **-** | **Square Feet** |
| **M²** | **-** | **Metres Squared** |
| **CDC** | **-** | **Craven District Council** |
| **DVD** | **-** | **Digital Versatile Disc** |

# 1 Introduction

1.1 Craven District Council has commissioned Donaldsons to undertake retail health check studies of four centres in the District, including Cross Hills. This is to assist in the preparation of the revision of the Local Plan/Local Development Framework and also to promote a future strategy for the District's centres.

1.2 The study comprises the following elements:

- An overview of Cross Hills and a consideration of its socio-economic profile;
- A health check of the vitality and viability of Cross Hills; 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 allow the Council to revise its existing policies and proposals for retail development in the smaller centres, with supporting justification, for the purposes of the LP/LDF preparation, 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 Cross Hills, 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.

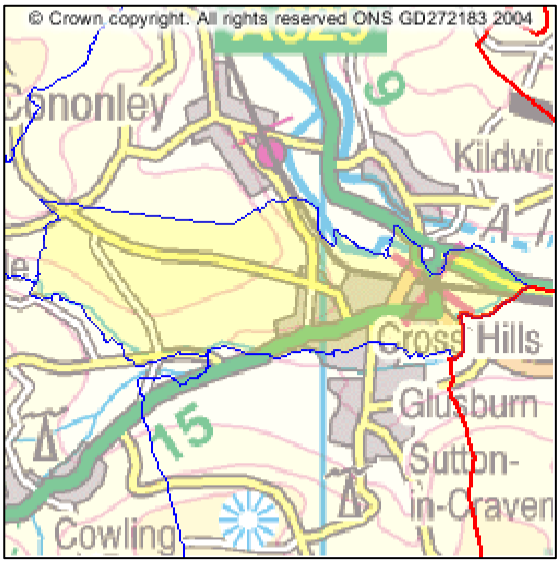
1.10 The nature of Cross Hills is such that there is little or no transactional evidence on which to base an accurate analysis of economic performance. Nevertheless, we have addressed the centre in terms of how well it performs its designated role and in comparison to the other centres within each classification.

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 Cross Hills is located in Glusburn ward, which has a population of 3,902, of whom 3,803 live in households according to the 2001 Census. The centre is located just off the A650 approximately 8 kilometres (5 miles) to the south east of Skipton. The buildings in the centre date mainly from the Victorian period, interspersed with some newer development, most notably, the Co-operative foodstore constructed in 2001. The centre is very linear in nature with the vast majority of the retail offer located on Main Street.

2.2 Lifestyle profiles for Cross Hills are set out in detail below, The data source for most of this information is the 2001 Census unless otherwise stated.




**Car Ownership**

| | Glusburn Ward | Craven | England and Wales |
|---|---|---|---|
| **Have no car or van** | 22.0 | 18.9 | 26.8 |
| **Have 2 or more cars or vans** | 31.1 | 34.2 | 29.4 |

2.3 Craven District has a considerably higher than national average level of car ownership, a reflection of the general prosperity of the area as well as its relatively rural nature and limited public transport services. From the figures above, it can be seen that, in a District context, a relatively large proportion (22%) of households in Glusburn have no car or van, but this is still significantly lower than the national (England and Wales) average. Most households have at least one car or van; 47% having one, and 32% having two or more.

**Household Tenure**

| | Glusburn | Craven | England and Wales |
|---|---|---|---|
| **Owner occupied** | 81.7 | 76.8 | 68.9 |
| **Rented from Council, Housing Association or Registered Social Landlord** | 10.4 | 9.6 | 19.2 |
| **Private rented or lived rent free** | 7.9 | 13.6 | 11.9 |

2.4 According to the 2001 Census, 97% of the resident population in Glusburn live in households, of which there are 1,667, with the remaining 3% living in communal establishments. The level of owner-occupation of houses is significantly higher than the national average (as it is throughout the Craven District). Consequently, the level of rented property is lower than the national average, both in the private and the council/social housing sectors.

**Employment**

Resident population aged 16 to 74 (percentage)

| | Glusburn | Craven | England and Wales |
|---|---|---|---|
| **Employed** | 70.1 | 65.6 | 60.6 |
| **Unemployed** | 1.6 | 2.0 | 3.4 |
| **Economically active full-time students** | 1.7 | 2.0 | 2.6 |
| **Retired** | 15.6 | 17.2 | 13.6 |
| **Economically inactive students** | 2.8 | 3.4 | 4.7 |
| **Looking after home/family** | 3.5 | 4.5 | 6.5 |
| **Permanently sick or disabled** | 2.9 | 3.6 | 5.5 |
| **Other economically inactive** | 1.8 | 1.8 | 3.1 |

Source: 2001 Census, ONS.

2.5 The level of unemployment in the ward is very low at only 1.6%. At 70.1%, employment is higher than both the national and the District average.

**Employment by Sector Glusburn Ward**

| Industry of Employment (Males 16-74 in Employment) | Percentage |
|---|---|
| | |
| **Agriculture/Hunting/Forest** | 3% |
| **Fishing** | 0% |
| **Mining & Quarrying** | 1% |
| **Manufacturing** | 27% |
| **Electric Gas & Water** | 1% |
| **Construction** | 13% |
| **Wholesale and Retail Trade; Repair of Motor Vehicles** | 16% |
| **Hotels & Catering** | 3% |
| **Transport Storage and Communication** | 6% |
| **Financial intermediation** | 4% |
| **Real Estate; Renting and Business Activities** | 9% |
| **Public Administration & Defence** | 4% |
| **Education** | 5% |
| **Health & Social Work** | 5% |
| **Other** | 3% |

| Industry of Employment (Females 16-74 in Employment) | |
|---|---|
| | **Percentage** |
| **Agriculture/Hunting/Forest** | 1% |
| **Fishing** | 0% |
| **Mining & Quarrying** | 0% |
| **Manufacturing** | 9% |
| **Electric Gas & Water** | 0% |
| **Construction** | 2% |
| **Wholesale and Retail Trade; Repair of Motor Vehicles** | 16% |
| **Hotels & Catering** | 7% |
| **Transport Storage and Communication** | 3% |
| **Financial intermediation** | 7% |
| **Real Estate; Renting and Business Activities** | 9% |
| **Public Administration & Defence** | 3% |
| **Education** | 11% |
| **Health & Social Work** | 27% |
| **Other** | 4% |

2.6 The office of national statistics has altered the way in which this data is presented and there are more categories than previous Census information provided. It does, however, provide a split by gender which is useful. The tables above show manufacturing to be a key area of employment for the ward as is true at District level. Retail is a vital area for both sexes, whilst construction is an important employment area for men, and health and social work accounts for over a quarter of all female employment within the ward, with education another 11%.

# 3 The Surveys

**The Retailer/Business Operator Survey**

3.1 This survey was distributed to all retailers and most business operators within the 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 16 completed questionnaires. This represents a response rate of 28% which is about average 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, service operators and professional and commercial businesses. This number and range of responses, whilst not allowing a particularly robust analysis of the survey, assists greatly in the Health Check assessment in that it provides an insight into the performance and views of those working in Cross Hills. It is not possible to use this sample as a proxy for the entire town centre because Cross Hills is relatively small and results can be skewed without a very high response rate town.

3.3 It should be noted that not every question was answered by all respondents. A copy of the questionnaire and a summary of the survey responses is included in Appendix 2, while the key findings of the survey are set out below.

3.4 13 respondents operate independent businesses and the other 3 are branches of national multiple businesses (although one is a franchisee), which is to be expected given the size of the town. Respondents display an above average awareness of who their customers are (whether predominantly regular, occasional or passers by), how far they travel, and how much, on average, they spend – which tends not to be the case in centres with a predominance of multiple operators.

3.5 There seems to be a high proportion of long-established businesses in Cross Hills – 50% of respondents have been trading in the town for over twenty years and just one has been in business for less than 2 years. Whilst this is an aspect of the town where the survey findings could be skewed by a higher than representative number of long-standing traders amongst the respondent sample, in this case our knowledge of the town indicates that there is in fact a significant level of longevity of business.

3.6 On average, respondent businesses employ between 1 and 2 full time and between 5 and 6 part time staff although the greatest number employed in a single business is 14 full time. In total, the 14 respondent businesses answering this question employ 47 full time and 45 part time staff.

3.7 85% of respondents are happy with their current accommodation. One of those who are dissatisfied finds the premises too small and proposes expansion within the property. The other finds the accommodation too fragmented and may decide to relocate out of Cross Hills. One respondent foresees possible closure of the business within the near future and another, whilst being satisfied with current accommodation, proposes internal expansion.

3.8 Some 38% 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, these respondents clearly acknowledge the importance of property maintenance/enhancement. Unfortunately, they appear to be in the minority in Cross Hills.

3.9 44% of respondents indicate that they open regularly on Sundays but this includes only 25% of respondent retailers. The majority who do not open on Sundays either believe there is insufficient trade/demand to do so or quite understandably feel that, as they work five and a half or six days per week, they need a day off – one mentions the fact that staff are unwilling 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:

- 54% indicate an improvement in trade;
- 23% indicate no change in their trading levels; and
- 23% report a decline in trade.

Over the last year:

- 50% indicate an improvement in trade;
- 29% indicate no change in their trading levels; and
- 21% report a decline in trade.

3.11 Reasons given for improvement include:

- Improvements made to premises;
- Growing reputation;
- Growth in local population;
- More business from a wider area;
- Quality of service;
- Better product range; and
- The conflict in Iraq.

Reasons given for decline include increased competition, former/ongoing effects of Foot and Mouth Disease and reduced consumer spending.

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

- 49% expect an improvement in trade;
- 38% expect no change; and
- 13% expect a decline.

3.13 Reasons for anticipated improvement are business becoming more established, more opportunity for custom and improved premises.

3.14 Reasons given for anticipated decline in trade are increased.competition from elsewhere and changes in consumer habits.

3.15 Over half of the respondents provided turnover details which we are, of course, treating as confidential information. Six retailers provided this information, indicating that, whilst one or two are trading at above average levels for their particular types of business, there are also those 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, although we have reflected these details in our analysis of the results of the Household Survey.

3.16 Respondents were asked to consider fourteen aspects of the town centre, rating them as excellent, very good, good, satisfactory, poor or very poor. One solitary aspect is regarded as good or better by more than 50% - the choice of places to eat and drink. Those regarded as satisfactory or better by more than 50% are:

| Town Centre Aspect | Good or Better | Satisfactory |
|---|---|---|
| Choice of places to eat and drink | 58% | 14% |
| Access by public transport | 46% | 40% |
| Quality of shops | 38% | 49% |
| Access by car | 34% | 39% |
| Security | 29% | 50% |
| Signage of car parks | 27% | 40% |
| Range of shops | 25% | 44% |
| Disabled access | 20% | 40% |
| Amount of car parking | 12% | 56% |

Cross Hills.compares rather disappointingly with Settle, where 7 aspects of the town centre are rated as good or better by more than 50% of those responding to the Settle retailer/ business operator survey.

3.17 By contrast, four aspects are very poorly regarded by respondents (more than 50% poor or very poor):

- Adequacy of police presence 73% poor or worse
- Activities other than shopping 62% poor or worse
- Attractiveness of environment 60% poor or worse
- Toilet/baby-changing facilities 60% poor or worse

Another aspect which scores relatively poorly is maintenance/cleanliness (50% poor or worse). All respondents have a view on just four of the aspects, while in the other ten, between 1 and 3 either do not know how good or otherwise they believe the particular feature to be, or simply did not volunteer an opinion.

3.18 When asked to identify the strengths of the town centre, over 60% mention one or more feature, most prominent of which is the friendly, village atmosphere. Other strengths mentioned include the high quality, personal service of specialist retailers, the town's convenient location and the fact that Cross Hills is an "excellent residential area".

3.19 All but 2 respondents believe the town has weaknesses, and some list several. Those most frequently mentioned are congestion with heavy traffic passing through the town centre, inadequate car parking and too much litter.

3.20 Other features mentioned by a number of respondents are:

- lack of policing;
- a poor range/choice of shops;
- poor signage to the town centre;
- vandalism; and
- insufficient activities for young people.

3.21 Respondents were asked what improvements they would like to see in the town centre and there are a number of positive suggestions, the most popular of which are additional car parking and environmental improvements (tree/flower planting, 'tidying up' the town centre and an improved street/footpath cleansing regime), followed by a greater/more frequent police presence.

3.22 Others suggest:

- more litter bins;
- the introduction of effective speed calming measures;
- better supervision of school children at lunchtime and after school;
- development of a community centre;
- grants to encourage shop improvements and to make Cross Hills more environmentally friendly;
- a business incentive scheme or business rates relief scheme to attract new traders; and
- improved pedestrian crossings.

3.23 Although there were a number of positive suggestions and various strengths identified, a significant proportion of respondents display a rather gloomy, negative attitude about Cross Hills, demonstrated in the lack of enthusiasm about its various aspects or for investment in premises and the willingness to identify weaknesses rather than strengths.

### The Household Survey

*3.24* NEMS, an accredited Market Research Agency, was 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.

3.25 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.

3.26 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.

*3.27* The results of the entire survey are analysed in detail in the Skipton Retail Study, whilst those pertaining to Cross Hills are considered in this report. The survey area was divided into nine zones, each comprising one or more wards, zone 1 being Cowling, Glusburn and Sutton In Craven. The total population of zone 1, according to the 2001 Census, is 9,478, of whom 9,257 live in households (the remainder residing in communal establishments) - *source*: *Office of National Statistics.*

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

3.29 Residents in most parts of the survey area sometimes visit Cross Hills, for a variety of purposes, although unsurprisingly the numbers diminish with distance from the centre. The proportion in each zone and the predominantly cited reason is set out below:

| | **Zone 1 Cowling, Glusburn, Sutton-in-Craven** | **Zone 2 Aire Valley with Lothersdale, West Craven** | **Zone 3 Skipton South, Skipton West** | **Zone 4 Embsay with Eastby, Skipton East, Skipton North** | **Zone 5 Barden Fell, Grassington Upper Wharfedale** | **Zone 6 Gargrave and Malhamdale, Hellifield and Long Preston** | **Zone 7 Penyghent, Settle And Ribblebanks** | **Zone 8 Ingleton and Clapham** | **Zone 9 Bentham** |
|---|---|---|---|---|---|---|---|---|---|
| **Sometimes Visit** | 61.1% | 28.6% | 10.7% | 8.8% | 1.3% | 4.4% | 1.3% | 1.6% | 0.0% |
| **Most Quoted Purpose of Visit** | Top-up food shopping | Top-up food shopping | Meeting friends | Meeting friends | Nothing in particular | General shopping | Nothing in particular | Meeting friends | N/A |

3.30 Cross Hills is also used for main food shopping by 20% of those in zone 1 who ever visit the centre. In addition to all forms of shopping and meeting friends, Cross Hills is visited for:

- Banking/financial services, post office;
- Leisure activities;
- Eating/drinking;
- The Library;
- Personal care/medical services – dentist/doctor/hairdresser, beautician etc; and
- Work.

3.31 When considering usage of Cross Hills by residents of the different wards in zone 1, the survey reveals that the centre is used by 89% of those in Cowling, 59% of those in Glusburn (even though the centre is actually in the Glusburn ward) and 48% of those in Sutton in Craven.

3.32 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)

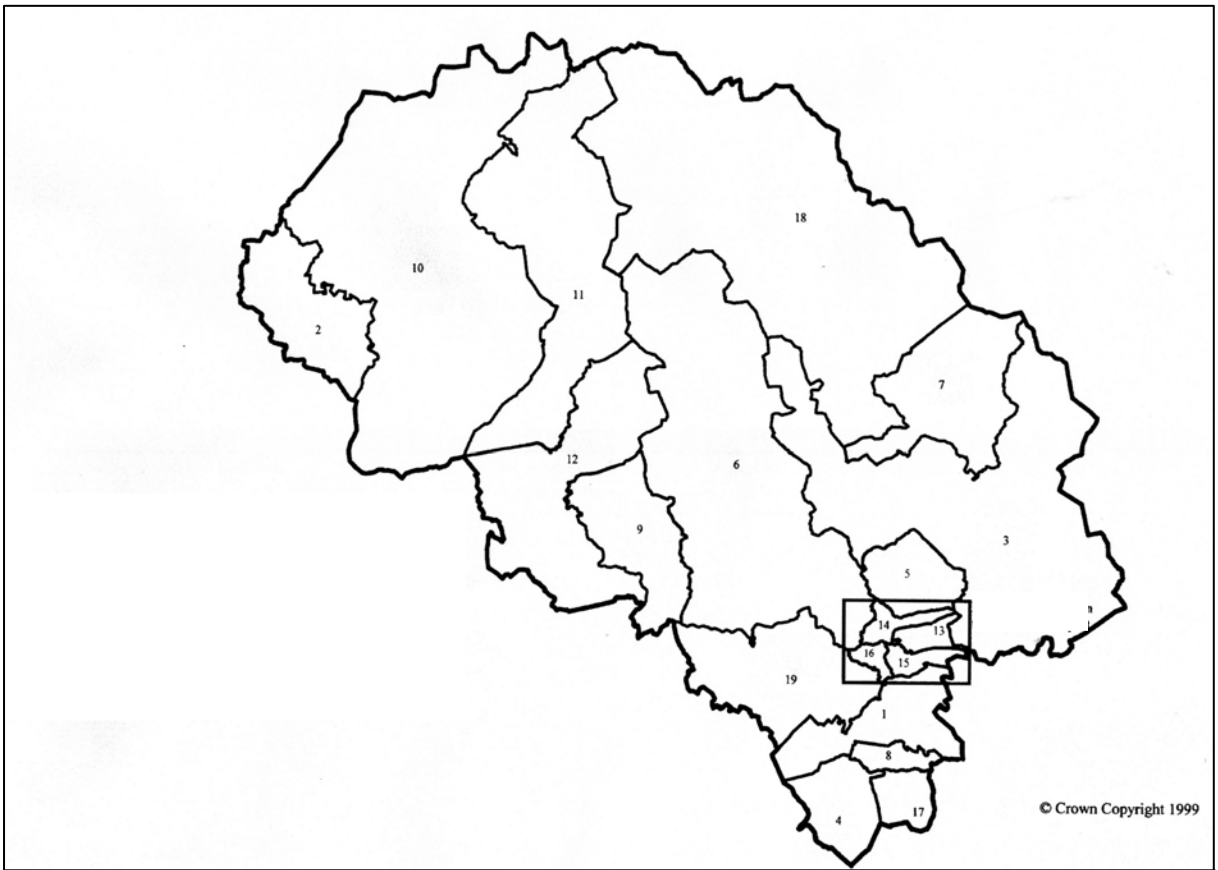
Zone 5: Barden Fell(3), Grassington(7), Upper Wharfedale(18)

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 – 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)

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

- its closeness to home (48%);
- 'nothing' (21%);
- good choice of shops (14%);
- attractive, pleasant environment (12%);
- shops all close together (11%);
- good quality shops (7%); and
- presence/convenience of banks, building societies and other services

11 other aspects are also liked, each by a small percentage of residents.

3.34 Local residents (those in zone 1) particularly like (again many mentioning more than one aspect):

- its closeness to home (60%);
- the good choice of shops (17.5%);
- shops all close together (16%);
- 'nothing' (15%);
- attractive, pleasant environment (14%);
- good quality shops (7.5%); and
- presence/convenience of banks, building societies and other services (6%).

8 other aspects are also liked, each by a small percentage of residents.

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

- 'nothing' (44%);
- traffic congestion (20.5%);
- 'don't know' (15%);
- not enough choice of shops (6%); and
- too busy/crowded (4%). (which we find particularly surprising).

9 other aspects are also disliked, each by a small percentage of residents.

3.36 Local residents (those in zone 1) particularly dislike (again many mentioning more than one aspect):

- 'nothing' (30%);
- traffic congestion (25%);
- 'don't know' (19%);
- dirty streets/litter (5%);
- lack of safety/personal security/hooligans (4%) and
- too busy/crowded (4%).

8 other aspects are also disliked, each by a small percentage of residents.

3.37 75% of zone 1 residents enjoy leisure activities outside the home, the most popular of which is walking, closely followed by playing sport and eating/dining. 24 other activities are also enjoyed as the main leisure activity outside the home (only one was asked for), each by a small percentage of residents. These include playing sport, eating out, swimming, drinking, the cinema, gardening, cycling, bowling and photography. 28% of these residents participate in their activity in Skipton, 18% in Keighley, just 12% in Cross Hills and 10% in various venues at different times. A very small percentage visits each of Cowling, Harrogate, Colne, Leeds, Bradford, Blackburn and Settle for main leisure purposes.

3.38 The majority of residents spend very little on their main leisure activity – 57% spend less than £20 per month, which is not surprising given the predominance of walking and playing sport.

### Comparison Shopping

3.39 Leaving aside food shopping, just 3.8% of households in zone 1 (and nobody in the other zones) regard Cross Hills as their main comparison goods shopping centre), which is not surprising, given the size and nature of the centre. All of those who do regard Cross Hills as their main centre reside in Glusburn - which contrasts with the findings at 3.30, where considerably more residents of Cowling use Cross Hills than either those in Glusburn or Sutton in Craven. Skipton is regarded as the main comparison centre by 44% of residents and Keighley by 43%. When considered on a ward by ward basis, the favoured centres are:

- Cowling Keighley 59%, Skipton 26%, Colne 11%
- Glusburn Skipton 48%, Keighley 35%, Cross Hills 9.3%
- Sutton-in-Craven Skipton 50%, Keighley 42%.

Other centres mentioned by just a handful of respondents in zone 1 are Colne, Leeds, Harrogate and Manchester.

3.40 Cross Hills is the selected normal venue for 13% of zone 1 residents for the purchase of personal care goods (cosmetics, toiletries etc.). Patronage of the centre in other sectors is even lower and nobody claims to 'normally' buy clothing or footwear in Cross Hills, preferring instead to go to Skipton, Keighley or Leeds where they can find several shops selling a wide range of goods for all occasions.

3.41 It is clear that Cross Hills does not play a major role as a comparison goods centre, which is to be expected in a secondary retailing/local service centre. Whilst a limited range of a number of comparison goods may be found in the centre (clothing, footwear, cards, gifts, jewellery, toiletries, hardware etc), it tends to cater for general everyday needs of the local community and occasional specialist needs (for example bicycles, antiques) but not for higher order comparison requirements in any of the retail sectors.

3.42 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.

3.43 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 1 as at the 2001 Census (9,257). Thus the comparison goods expenditure generated in zone 1 is currently around £18.51M (9,257 @ £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.

3.44 It is clear from the survey results that a very small proportion of this expenditure – around £1M representing a market share of 5% - is devoted to Cross Hills and this situation is unlikely to change to any great extent. Whilst there is, in theory, plenty of capacity for new comparison retail floorspace in the centre, in reality it is unlikely to attract many new retailers, given the proximity and offer of Skipton and Keighley. There are always exceptions, of course, and Terrain Cycles, a specialist cycle retailer, has demonstrated how a specialist business can succeed in a small, secondary local centre, the profile of which does not meet the criteria of the modern High Street retailer.

3.45 More than half the comparison retailers who responded to our business survey are patronised by customers from outside the immediate area (i.e. from more than 5 miles away), including some businesses which are not normally regarded as particularly specialised, some achieving significant levels of such patronage. These customers clearly find that Cross Hills satisfies their particular needs or is a convenient location to carry out certain types of shopping.

3.46 For example, as is investigated in slightly more detail at 3.52 below in relation to convenience goods, it is likely that many of the staff and pupils of South Craven School buy a variety of comparison goods from local shops, and the same is true of others who work in Cross Hills but who do not necessarily live in the area or who would not otherwise shop in the centre.

### Convenience Shopping

3.47 The following table sets out where residents in zone 1 carry out their main food/grocery shopping and further breaks this information down on a ward by ward basis. A small, but not insignificant, proportion of residents patronise Cross Hills for this purpose, but the survey found that nobody in any other zone does so. (It should be noted that there may well be a handful of residents of other zones who do in fact carry out their main food shopping in Cross Hills, as a survey sample of this size cannot be 100% accurate, but we are confident that any such exceptions are not significant).

| USUAL DESTINATION FOR MAIN FOOD SHOPPING | ZONE 1 % | Glusburn | Cowling | Sutton-in-Craven |
|---|---|---|---|---|
| **Cross Hills** | | | | |
| Co-Op | 6.1% | 14.8% | 0.0% | 0.0% |
| **Other Craven** | | | | |
| Skipton | 64.2% | 62.9% | 40.7% | 78% |
| Settle | 1.5% | 3.7% | 0.0 | |
| **Other Areas** | | | | |
| Keighley | 20.6% | 16.7% | 37.0% | 16.0% |
| Colne | 3.1% | 0.0% | 14.8% | 0.0% |
| Other towns | 3.9% | 1.9% | 3.7% | 6.0% |
| Internet/Delivered | 0.8% | 0.0% | 3.7% | 0.0% |

3.48 The survey demonstrates that Cross Hills is not a significant venue for main food shopping, but is an important centre for top-up requirements, supporting a relatively high amount of convenience floorspace.

3.49 The table below demonstrates the usage of Cross Hills for top-up purposes.

| USUAL DESTINATION FOR TOP UP FOOD SHOPPING | ZONE 1 % | ZONE 2 % | Glusburn | Cowling | Sutton-in-Craven |
|---|---|---|---|---|---|
| **Crosshills** | 44.3% | 5.2% | 59.3% | 48.1% | 26.0% |
| Local Shops | 6.1% | 2.6% | 0.0% | 18.5% | 6.0% |
| Skipton | 27.5% | 23.4% | 22.2% | 11.1% | 42.0% |
| Elsewhere | 13.0% | 5.2% | 16.8% | 14.8% | 8.0% |
| Don’t do top-up | 9.2% | 57.1% | 1.9% | 7.4% | 18.0% |
| Don’t know | 0.0% | 6.5% | 0.0% | 0.0% | 0.0% |

3.50 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 1 is currently around £14M. The conventional split between main and top-up expenditure is 70%/30%, but the survey results indicate that in zone 1 it is approximately 60%/40%.

3.51 Based on the survey results, Cross Hills is currently retaining some £3M of the £14M or achieving a market share in zone1 of 21.4%. In addition, the town is achieving some £120,000 of the convenience goods expenditure generated in zone 2.

3.52 The survey does not, of course, take into account the expenditure in Cross Hills by visitors or others who live outside the study area, whose contribution in many towns is essential to their survival. Given the nature and size of the convenience shops in Cross Hills, and taking into account some of the responses to the Retailer and Business survey, we estimate that the centre benefits from a significant additional expenditure, in convenience goods, from outside its immediate area and is achieving a convenience goods turnover of at least £7M.

3.53 For example, in estimating this additional turnover, we believe that Cross Hills is likely to benefit from a significant amount of expenditure, predominantly in convenience goods (e.g. lunch time trade), from the staff and pupils of South Craven School (around 1,700 pupils and 150 staff). We are unable to produce an accurate estimate of the value of this trade to Cross Hills as we have no information on the percentage of pupils eating school lunches or taking packed meals from home, but we believe that many of those pupils will also purchase extra food, sweets and drinks in the centre. We also acknowledge that the expenditure of staff and pupils living in the zone 1 area may have already been taken into account, to a certain extent, within the analysis of the household survey.

3.54 Nevertheless, if just 25% of pupils and 33% of staff each spend £10 per week over the school year (38 weeks), the total expenditure enjoyed by businesses in Cross Hills will be in the region of £180,000 per annum. Similarly, the centre clearly benefits from expenditure by others who work in, but do not necessarily reside in, the local area.

3.55 Whilst a considerable proportion of convenience expenditure is leaking out of Cross Hills, it is in our view unlikely that the centre will recover a significant amount of that leakage, given the attraction of the larger superstores in Skipton and Keighley, particularly for main food shopping.

3.56 Cross Hills serves its local community very well in respect of top-up shopping and caters for many of its basic everyday comparison needs. However, it lacks the range of outlets and goods to satisfy all comparison needs and, in particular, higher order purchases. Given the proximity of Skipton and Keighley and the shopping facilities available there, we do not regard Cross Hills as having any significant potential for retail growth.

# 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 the Cross Hills 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 may be seen that service and comparison retail facilities dominate the centre in terms of numbers of outlets, representing between them 64% of the retail units in Cross Hills. The 5 convenience units account for a significant amount of floorspace with a large foodstore and two convenience stores on Main Street, a butcher, baker and the Snax 24 convenience store attached to the petrol station on Station Road.

| | No. Of Units | % Total |
|---|---|---|
| **Convenience** | 5 | 7.04% |
| **Comparison** | 23 | 32.39% |
| **Service** | 38 | 53.21% |
| **Vacant** | 3 | 4.23% |
| **Miscellaneous** | 2 | 2.81% |
| **Total** | **71** | 100% |

4.2 In addition to the pure retail offer, considered in more detail below, Cross Hills provides a variety of services and other facilities, including a public library, dentist and chiropodist, all on Main Street, a Post Office close to the junction of Keighley Road and Main Street, a Dentist on Main Street, a Chiropodist again located on Main Street, and a school / private day nursery and health centre in Ashville Terrace.

4.3 There are two public houses on Keighley Road. Other food and drink leisure venues include a traditional fish and chip shop on Keighley Road and the Main Street Sandwich Bar (self-styled as 'The Legendary Sandwich Experience), the Village Café and Chinese and Italian Restaurants all located on Main Street. The Chinese restaurant provides a take away service and there is an Indian takeaway also on Main Street.

4.4 Other services include two banks and two building societies, estate agents, solicitors hairdressers and a beauty salon.

### Retailer Representation

4.5 Cross Hills is made up predominately of small independent retailers most of whom operate service businesses. There is representation from multiples in terms of foodstore provision which includes the Spar and Co-op. The Co-op is an excellent development which took place around two years ago and has helped to sustain the centre which was at the time considered by local people to be failing. Cross Hills is a very linear centre and the Co-op goes some way to breaking up this problem by opening up the main retail pitch. It also provides valuable car parking in a square in front of the store. The importance of the Co-op was emphasised in the District wide household survey, which found that 15% of Glusburn's residents carry out their main food shopping at the store, and a significantly greater proportion (in Glusburn and Cowling) undertake top up shopping there.  From observation, it is clear that many of the stores customers link their food shopping trips with visits to other facilities within Cross Hills.


Co-op Cross Hills

4.6 The Spar is a reasonable store although it is somewhat tired in terms of its internal fit out, and would benefit from refurbishment, which we understand is planned for the near future.

4.7 With the exception of the “high street” banks, Cross Hills’ other retailers are established independent traders.  As with many smaller centres, there is concern that, when these proprietors retire, there is seldom a family member waiting to take over the business as used to happen.  It is almost impossible to sell a small business nowadays and there is a genuine fear that if such shops close, it may be difficult to find new business occupiers to maintain the critical mass necessary to sustain the health of the centre.  In Cross Hills, it is likely that the Co-op will survive well and that some businesses will continue to benefit from “spin off” trade, however, the domino effect of the closure of a few key businesses in small centres cannot be underestimated.

4.8 It is considered that in Cross Hill there will generally be demand from small start up businesses which cannot afford the rentals commanded by larger town centres. The problem here is that landlords are often reluctant to take on such tenants, considering them poor covenants.  If they do take the risk, start-up businesses frequently have a limited life span, which would result in a greater turnover of property in the future and a lack of cohesion within the centre.

4.9 One example which bucks this trend, however, is Terrain Cycles which is located either side of the Spar, and occupies the first floor (which over sails the Spar and Nice n Spicy – see photograph) where it has a showroom.  Like many cycle shops, Terrain located in Cross Hills, having purchased a previous bike business, because the rentals offered were reasonable enough to allow the establishment of their brand in an area which is very popular with cyclists.  Once established Terrain expanded their premises and took a lease on the building to the left of the Spar to give the shop more presence and mostly make it "look" like a big shop. Terrain is now known nationally and has a strong mail order side to its main shop trade. The shop brings people from a wide catchment area including Leeds, and these visitors have the potential to use other shops and businesses within the town, provided that the goods and services they demand are available.

Terrain Showroom


Terrain Cycles

4.10 The Main Street Sandwich bar, pictured below, also appears to trade well, undoubtedly capitalising on the main road position and passing trade. The business has made good use of a small stand alone unit fronting the high street, although here again it is unlikely that this unit would be occupied by anyone other than a small independent given its size and age. Nevertheless, the proprietor of this business has created an inviting environment through clever design of windows and signage and an innovative product range.


Main Street Sandwich Bar

4.11 Another well-established independent is that of Bella Napoli. The Italian restaurant has a very good reputation and has traded in Cross Hills for a number of years.

4.12 There is an established very large Antiques centre located outside of the main retail area at the junction of the A6068 and Keighley road. It benefits from its main road position and plentiful car parking, as well as its inviting window displays.


The Antiques Centre

4.13 In addition to the Antiques centre, there are other uses which are located outside of the main retail area, but within the Cross Hills settlement itself. These include the Burberry Factory shop which is located off the A6068, and opposite the Antiques centre are a small garden centre, another antiques shop, and a Public House.

4.14 There are a limited number of retailers on Station Road, the largest of which is the Furniture shop located towards its northern most end. Station Road also has one of two petrol filling stations both of which have small general stores within. The station road filling station has the SNAX 24 hour concept, whilst the Esso Garage near the roundabout at the junction with the A629, has a Sunwin Co-op store. The latter is of some concern in terms of the health of Cross Hills. This filling station is adjacent to the main business park which could well bring valuable lunchtime trade into the centre of Cross Hills. The Co-op within the filling station however, is within easier reach of the centre and it is likely that this takes a considerable amount of this trade.

**The Proportion of Vacant Street Level Property**

4.15 The level of vacant properties is limited to 3 at present, one of which – located on Ashville Terrace is unlikely to suit anyone other than a small sandwich shop or similar as it is very small and dated. This limited turn over of property is a reflection of the fact that the majority of retailers are long established independents.

4.16 We understand that there was until recently a greengrocers in the centre, which was vacant at the commencement of our study but which has now been let as a clothes shop. We have, however, been unable to confirm the terms of this letting.

**Retail Rents**

4.17 From our discussions with local agents it appears that few transaction have taken place in recent times, although we anticipate that given the amount of small independents it is likely that a number are owned freehold.

4.18 We are aware of one recent transaction in respect of one of the units occupied by Terrain Cycles. We understand that the unit to the extreme left i.e. adjacent to the vacant Dress Agency, was recently sold. The unit included the upper floors which are residential, and the price achieved was reported to be close to £120,000. The rental passing on the retail element is £1,750 per annum and the current lease has some 18 months to expiry. Discussions with the agent reveal that Terrain is unlikely to renew its lease and therefore this unit will most likely become vacant in 18 months time.

4.19 From our discussions with agents and our own experience, we are of the opinion that rentals in Cross Hills are in the range of £160 - £215 per $m^2$ (£15 - £20 per sqft) in terms of zone A.

**Commercial Yields on Non-Domestic Property**

4.20 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.

4.21 Commercial funding institutions and investors are unlikely to view Cross Hills as a key location in which to invest, given that it is such a small centre and there is also a 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.

4.22 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**

4.23 The main pedestrian flow movement in Cross Hills is centred around the Co-op and along Main Street. Having visited Cross Hills both during the week and at the weekend, we could not perceive any time when the centre was particularly busy, with the notable exception of the period immediately after school closing time (and to a lesser extent that before school opening time). We have also seen relatively large numbers of school pupils in the centre at lunch times, particularly during periods of good weather. We find that, relative to the catchment area that it serves, Cross Hills is well used.

## Accessibility

### Car

4.24 Cross Hills is relatively accessible by car given that its primary retail area is situated on the A6068 which is a main route to Nelson / Colne, and also the M65. There are therefore, strong links into the A629 which provides good access to Skipton to the North and Bingley to the south east, and of course to Leeds and Bradford which, with the opening of the Bingley Bypass are now considerably more accessible.

### Rail

4.25 Travel by train is via Steeton, which is the nearest station to Cross Hills, some 2.5 km (1.6miles) to the east. Steeton provides good links to Leeds and Bradford, and is popular with commuters. Travelling by train to the West provides good links into the Dales although travel to Manchester is more problematic with multiple changes necessary.

4.26 There has in the past been talk of a new station at Cross Hills although at the present time, we understand that the proposal is still at the feasibility stage, and remains a long term proposition. This would of course make Cross Hills more popular in terms of a Residential Location, and may attract more commuters.

### Bus

4.27 Bus links are good given the main road position of the high street, and there are regular services to Keighley , Skipton and surrounding areas.

### Customer Views and Behaviour

4.28 Our household survey has identified that Cross Hills' primary catchment area is limited to the area covered by zone 1 – the Glusburn, Cowling and Sutton-in-Craven wards, comprising a population in households of 9,257 as at the 2001 Census.

4.29 Within this primary catchment area, just 9.3% of Glusburn residents (equivalent to 3.8% of zone 1) regard Cross Hills as their main comparison goods shopping centre. When looking at shopping patterns, Cross Hills is achieving a market share of just over 5% of comparison expenditure, indicating a leakage out of the area of some £17.5M.

4.30 Cross Hills achieves a market share of around 21% of convenience expenditure within its primary catchment area, indicating a leakage of some £11M.

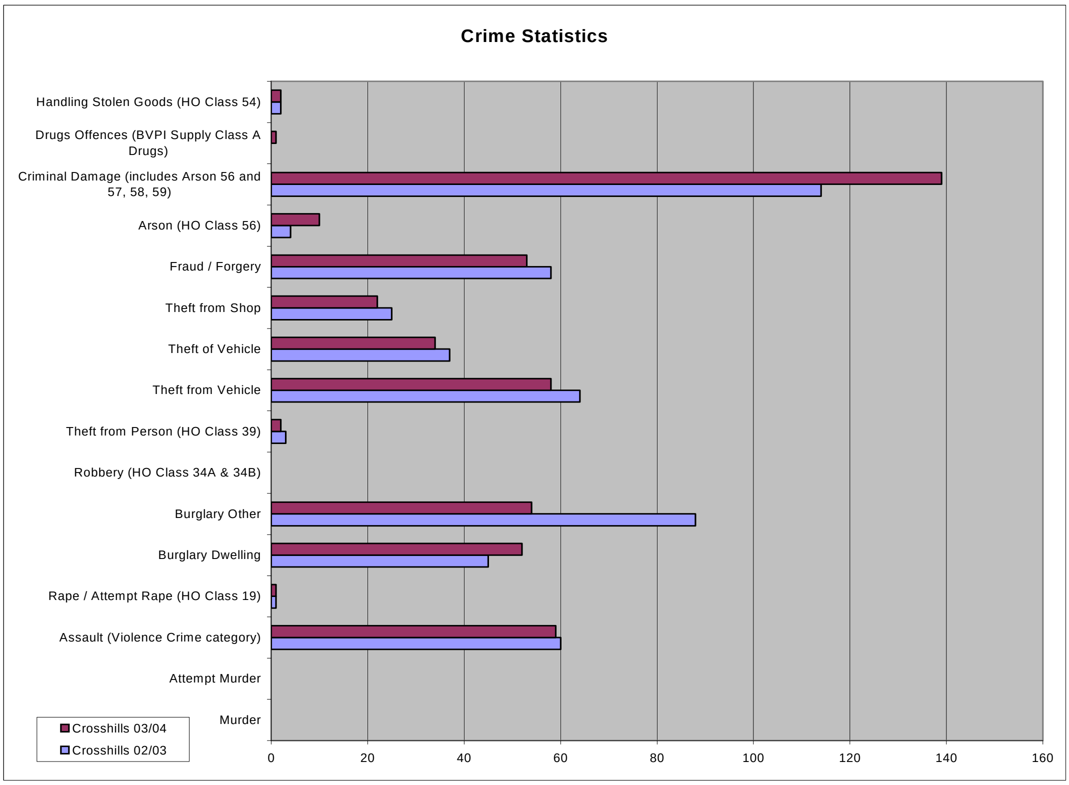
4.31 Customers particularly like Cross Hills' convenient location (proximity to home being rated as its top attraction). Relatively few customers acknowlege other likes - its choice of shops being cited by 17.5%, the fact that the shops are all close together by 16% and its attractive/pleasant environment by just 14%. Other features appreciated by even fewer include are the quality of the shops and the presence of financial and other services.

4.32 Relatively few customers are able to find anything to dislike about Cross Hills, which is encouraging. Heading the list of dislikes (mentioned by 25% of the zone 1 sample) is traffic congestion. Other dislikes, mentioned by even fewer customers, include dirty streets/litter, lack of safety/personal security/"hooligans" and the belief that the village is too busy/crowded.

**Perceptions of Safety and Occurrence of Crime**

| | Cross Hills 02/03 | Cross Hills 03/04 |
|---|---|---|
| Murder | 0 | 0 |
| Attempt Murder | 0 | 0 |
| Assault (Violence Crime category) | 60 | 59 |
| Rape / Attempt Rape (HO Class 19) | 1 | 1 |
| Burglary Dwelling | 45 | 52 |
| Burglary Other | 88 | 54 |
| Robbery (HO Class 34A & 34B) | 0 | 0 |
| Theft from Person (HO Class 39) | 3 | 2 |
| Theft from Vehicle | 64 | 58 |
| Theft of Vehicle | 37 | 34 |
| Theft from Shop | 25 | 22 |
| Fraud / Forgery | 58 | 53 |
| Arson (HO Class 56) | 4 | 10 |
| Criminal Damage (includes Arson 56 and 57, 58, 59) | 114 | 139 |
| Drugs Offences (BVPI Supply Class A Drugs) | 0 | 1 |
| Handling Stolen Goods (HO Class 54) | 2 | 2 |
| | 501 | 487 |

*Source: North Yorkshire Police*



4.33 From the above information it is clear that in general terms, crime levels within Cross Hills are relatively low although offences of criminal damage have increased by 21.9% over the last 12 months.

4.34 In general all of the other crimes recorded are relatively low in volume terms and the results show a reduction of the majority over the last twelve months.

4.35 This said, the retailer and business questionnaires received make a number of comments regarding criminal damage – in particular one trader who appears to be having considerable trouble with youths and has had a number of windows smashed. There are also comments about a lack of police presence within the centre, which could easily be addressed given the close proximity of the police station.

### Town Centre Environmental Quality

4.36 The single most significant drawback, in terms of the town centre environmental quality of Cross Hills, is the presence of the main road. The majority of the shops are converted terraced houses that have presumably capitalised on the passing trade over the years to form a small local shopping centre. The problem here is that the pavements were not designed to take this into account and are therefore of a fairly standard width providing insufficient division between the motor vehicle and pedestrian which results in a rather intimidating shopping experience.


Peking Chinese

4.37 This position is helped somewhat by the presence of a pedestrian crossing and traffic lights, although it is felt that improvements could be made through traffic calming measures. Furthermore, we feel that an opportunity exists to better define the centre, perhaps by providing features at the key gateways and even changing the road surface within the retail core.

4.38 Given that the centre is small, there in not much scope for open space. We have already mentioned that the Co-op site goes some way to reducing the linear nature of the centre. Additionally, there is a small area of green space on the main high street. In urban design terms this format is somewhat dated and more could, we feel, be made of it.

Open Space Main Street

Untidy Private Space – Main Street

4.39 Conversely there are areas which would benefit from tidying up such as the area pictured above. Situated on Main Street, we assume this area is in private ownership. Efforts should, however, be made to urge the owners to clear up this area.

4.40 Many of the shop fronts and fascia boards throughout the centre would benefit from improvement or redecoration. There are notable exceptions including, for example, Main Street Sandwich Bar where considerable efforts have been made to maintain premises and display goods to a high standard.

# 5 SWOT ANALYSIS

5.1 Our research has enabled us to carry out a SWOT analysis (Strengths, weaknesses, opportunities and threats) of Crosshills.

**Strengths**

- The Road – Passing Trade
- Good quality centrally located car park
- Surrounded by dense immediate catchment population
- Strong pull of top up shoppers
- Good choice of top up shopping

**Weaknesses**

- The Road – insufficient pavement width for safe separation of heavy traffic
- Prevalent negative attitude of retailers
- Linear yet fragmented High Street
- Some degree of neglect/dirty shop fronts – whilst somewhat a product of the road, better management would help.

**Opportunities**

- Possible relocation of Library to provide more modern Library/learning facility and creation of quality public realm area to break up linear High Street.
- Shop front improvement scheme
- Refurbishment of vacant and neglected buildings.
- Effective traffic calming scheme

**Threats**

- Decline of retail provision following retirement of independent retailers.
- Domino effect on remaining businesses
- Increase in traffic, damaging environmental quality and deterring visitors
- Doing nothing

# 6 Conclusions and Recommendations

6.1 Overall, Cross Hills is a small service centre, with a number of established independent businesses, which caters for the local residents. The addition of the Co-op is a welcome one and goes some way to breaking up the linear nature of the centre, whilst providing a key attraction evidenced by its use for top up shopping.

6.2 Given the retirement of some proprietors in the coming years, it is difficult to see sufficient demand for space within the centre, to sustain it in its current format over time. It is likely therefore that Cross Hills will contract, and centre around the Co-op store.

6.3 Furthermore, the survey analysis concludes that a considerable proportion of convenience expenditure is leaking out of Cross Hills, and that in our view it is unlikely that the centre will recover a significant amount of that leakage, given the attraction of the larger superstores in Skipton and Keighley, particularly for main food shopping.

6.4 Cross Hills does, however, serve its local community very well in respect of top-up shopping and caters for many of its basic everyday comparison needs. However, it lacks the range of outlets and goods to satisfy all comparison needs and, in particular, higher order purchases. Given the proximity of Skipton and Keighley and the shopping facilities available there, we do not regard Cross Hills as having any significant potential for retail growth.

6.5 This said, we do consider that opportunities present themselves to help the future of Crosshills by addressing some of its key problems. We would therefore recommend the following:-

- Consideration of a shop front improvement scheme
- Consideration of the feasibility of relocating the Library and creating new public realm to break up the linear nature of the centre
- Consideration of a traffic calming scheme
- Better definition of the retail area by providing “gateway features”

6.6 It is also worth undertaking consultation with the local traders to encourage them to buy in to any proposals. This may bring them together more and address the negative attitude which we have encountered. By working together, they may have a greater desire to drive forward the future of Cross Hills.

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## Appendix 1 – Plan of Cross Hills Retail Area

## Appendix 2 – Retailer/Business Questionnaire & Analysis

Appendices

# RETAILER/BUSINESS QUESTIONNAIRE

Donaldsons have been appointed by the District Council to undertake a study to assist in the preparation of the Local Development Framework for the District. Your contribution will be vital to this process and to our understanding of the issues that are important to businesses in Crosshills. We would be very grateful if you could complete this short questionnaire and return it in the envelope provided.

Please note that although your name and address are requested, no information will be published which will identify any individual respondent. If you do not wish to answer any question, please feel free to leave it blank. Any information received will be treated in the strictest confidence.

| |
|---|
| **1.a.Trading Name:** |
| |
| **1.a. Business Address:** |
| |
| **2. Telephone Number:** |
| |
| **3. Goods Traded/Services Offered** |
| |

4. **Are you part of a national multiple chain, a franchisee or an independent retailer/business?** (Please tick appropriate response)

| | | | |
|---|---|---|---|
| National Multiple | | Independent Business | |
| Regional Multiple | | Franchisee | |

**5. How many staff work on the premises?**

| | | | |
|---|---|---|---|
| Full Time | | Part Time | |

**6. How long has your business occupied your premises in Crosshills?**

| | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| Less than 1 year | | 1-2 years | | 2-5 years | | 5-10 years | | 10-20 years | | 20+ years | |

| |
|---|
| **7.a. What is your total floor area (inc. storage accommodation) (sq. ft.)?** |
| |
| **7.b. What is your net sales area(sq. ft.) ?** |
| |
| **8.a. Are you satisfied with your current accommodation?** |

| | | | |
|---|---|---|---|
| Yes | | No | |

| |
|---|
| **8.b. If no, why not?** |
| |
| **9.a. Given the choice what would your optimum unit size be?** |

| | | | |
|---|---|---|---|
| **Up to 45 m² (500 ft²)** | | **185 – 370 m² (2,000 – 4,000 ft²)** | |
| **45 – 90 m² (500 – 1,000 ft²)** | | **370 – 555 m² (4,000 – 6,000 ft²)** | |
| **90 – 140 m² (1,000 – 1,500 ft²)** | | **555 – 930 m² (6,000 – 10,000 ft²)** | |
| **140 – 185 m² (1,500 – 2,000 ft²)** | | **Over 930 m² (10,000 ft²)** | |

| |
|---|
| **10. Do you have any plans for investment in your current premises – shop front works, refurbishment, redecoration etc. ? (Please detail):** |
| |

| | |
|---|---|
| **11. Do you expect any of the following changes to your business over the next few years:** | |
| Expansion within current premises | |
| Relocation to alternative premises in Crosshills | |
| Contraction within current premises | |
| Closure of current premises | |
| Relocation to alternative premises outside Crosshills | |
| Other (please detail) | |

| |
|---|
| **12.a. Do you currently trade on Sundays?** |

| | | | |
|---|---|---|---|
| **Yes** | | **No** | |

| |
|---|
| **12.b. If no, do you have any plans to do so?** |

| | | | |
|---|---|---|---|
| **Yes** | | **No** | |

| |
|---|
| **12.c. If no, why not?** |
| |

| **13. Approximately, what is the turnover of your business?** |
| --- |
| £ per week/annum (delete as appropriate) |

| **14. Has your business traded better, worse or about the same in?** | | | |
| --- | --- | --- | --- |
| | Improved | No change | Declined |
| Last twelve months | | | |
| Last two years | | | |

| **15. If you have experienced a change in turnover during either of these periods, can you identify any particular reason?** |
| --- |
| |

| **16.a. What are your expectations for trading over the next two years?** | | |
| --- | --- | --- |
| Improving | Static | Worse |
| | | |

| **16.b. If you expect the trading conditions to change, do you have any particular reason for this change?** |
| --- |
| |

| **17. Are most of your customers:** | |
| --- | --- |
| Regular | |
| Occasional | |
| Passers By | |
| Tourists | |
| All of the above | |
| Don’t Know | |

| **18. Where do your customers come from?** | |
| --- | --- |
| Within 1 mile | % |
| 1 to 2 miles | % |
| 2-5 miles | % |
| 5 miles or more | % |

| **19. How much do your customers spend on average?** | | | |
| --- | --- | --- | --- |
| Less than £10 | | £31-£50 | |
| £11-£20 | | £51-£100 | |
| £21-£30 | | More than £100 | |

**20. Listed below are a number of features considered important to shoppers when choosing where to shop. Please rate the Crosshills features according to how good you feel the provision of each one is.**

| **FEATURE** | **RATING (Please tick appropriate response)** | | | | | | |
|---|---|---|---|---|---|---|---|
| | Excellent | Very Good | Good | Satisfactory | Poor | Very Poor | Don't Know |
| **Range of Shops** | | | | | | | |
| **Quality of Shops** | | | | | | | |
| **A wide range of activities other than shopping** | | | | | | | |
| **Choice of places to eat and drink** | | | | | | | |
| **Toilet and Baby changing facilities** | | | | | | | |
| **Disabled access into and around the centre** | | | | | | | |
| **Security in the shopping area and car parks** | | | | | | | |
| **Adequate Police presence** | | | | | | | |
| **Attractive environment** | | | | | | | |
| **Access by public transport** | | | | | | | |
| **Amount of car parking** | | | | | | | |
| **Access by car** | | | | | | | |
| **Appropriate signage to car parks** | | | | | | | |
| **Maintenance and cleanliness** | | | | | | | |

**21. As a retailer/business person, what do you think are the major strengths of Crosshills Town Centre?**

**22. As a retailer/business person, what do you think are the major weaknesses of Crosshills Town Centre?**

**23. What improvements/additional features would you like to see in Crosshills Town Centre?**

**24. Do you wish to make any other comments about Crosshills Town Centre?**

Please feel free to continue overleaf or on a separate sheet of paper.

**Thank you for taking the time to complete this Questionnaire.**

An envelope is provided for your use, but should that be mislaid, we would be grateful if you could return the questionnaire to:

Amanda Eaton
Donaldsons
St Paul's House
23 Park Square South
LEEDS
LS1 2ND

CRAVEN DISTRICT COUNCIL

# Cross Hills Town Centre Health Check

# Appendix 2

# Retailer & Business Questionnaire Analysis

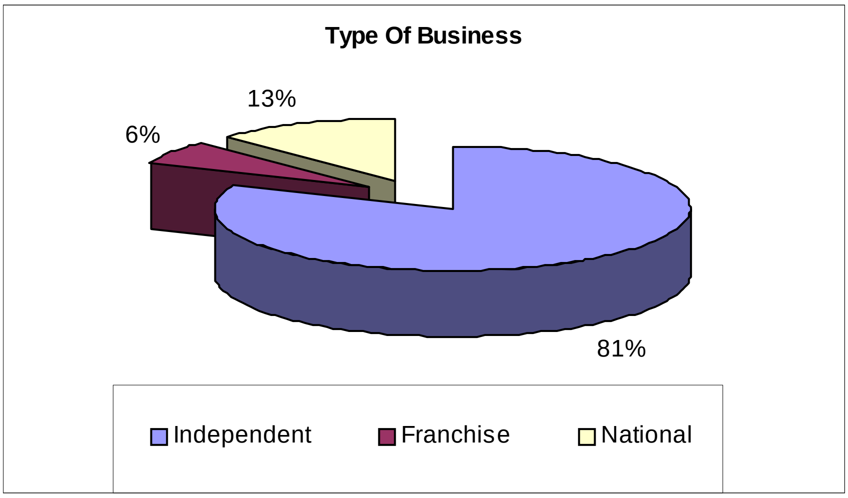
## Appendix 2 – Cross Hills Retailer and Business Questionnaire

A retailer and business survey was distributed amongst the retailers and businesses in the town to canvas their views on a range of issues affecting the town and area. Responses were received from 16 of the businesses in the town, which is an average return rate of 28%.

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 number, goods sold/service offered)

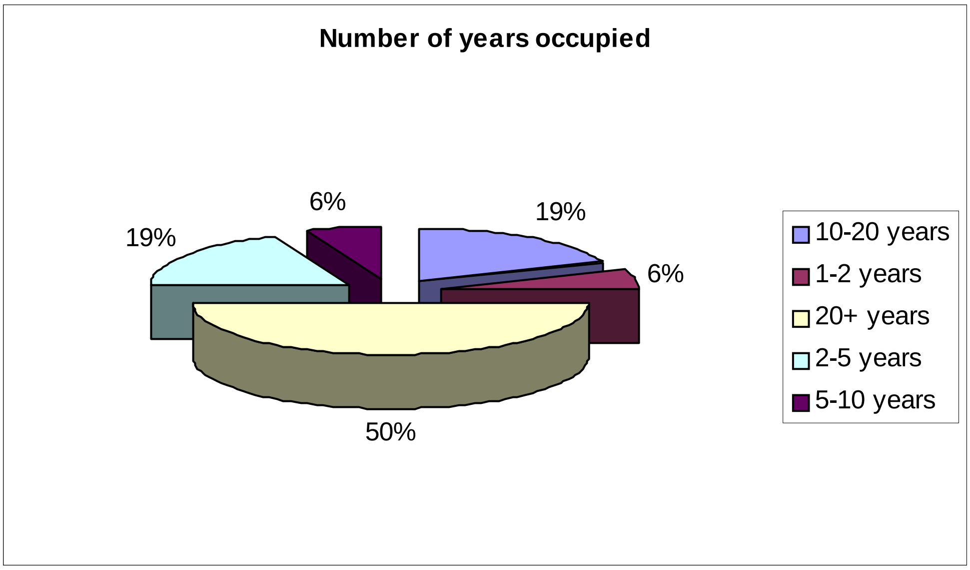
**Question 4 – Are you part of a national multiple chain, a franchisee or an independent?**




**Question 5 - How many staff work on the premises?**

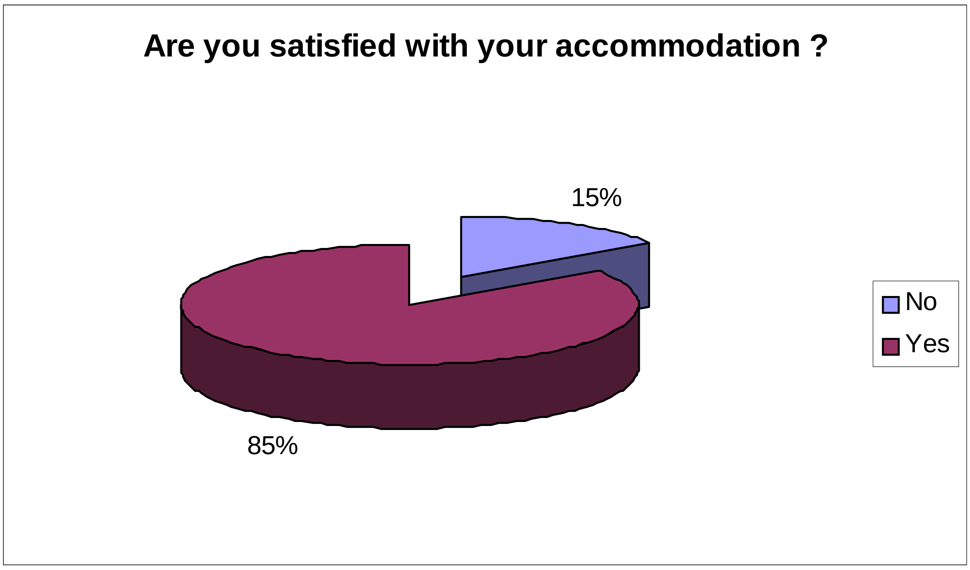
The respondents between them employ 49 full time and 45 part time staff. One respondent employs 14 full time staff, but no part time and one employs 4 full time and 10 part time. On average, the businesses employ 2.9 full time and 4.1 part time staff.

**Question 6 - How long has your business occupied premises in Cross Hills?**

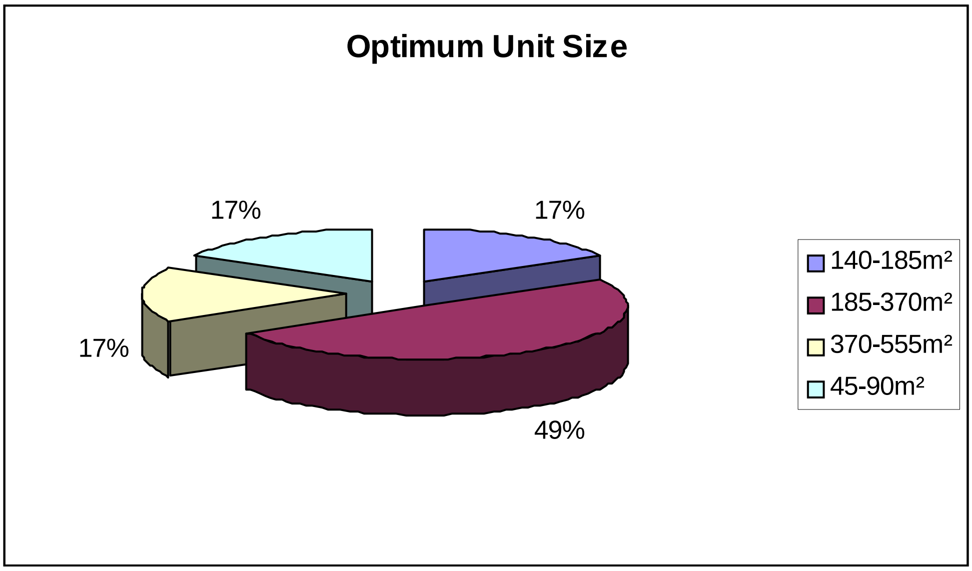



**Question 7** – requested details of floor area occupied. Only 8 respondents answered this question: 4 trade from units of less than 93m² (1,000 ft²) gross, while the other 4 occupy units of between 204m² (2,200 ft²) and 604m² (6,500 ft²) gross.

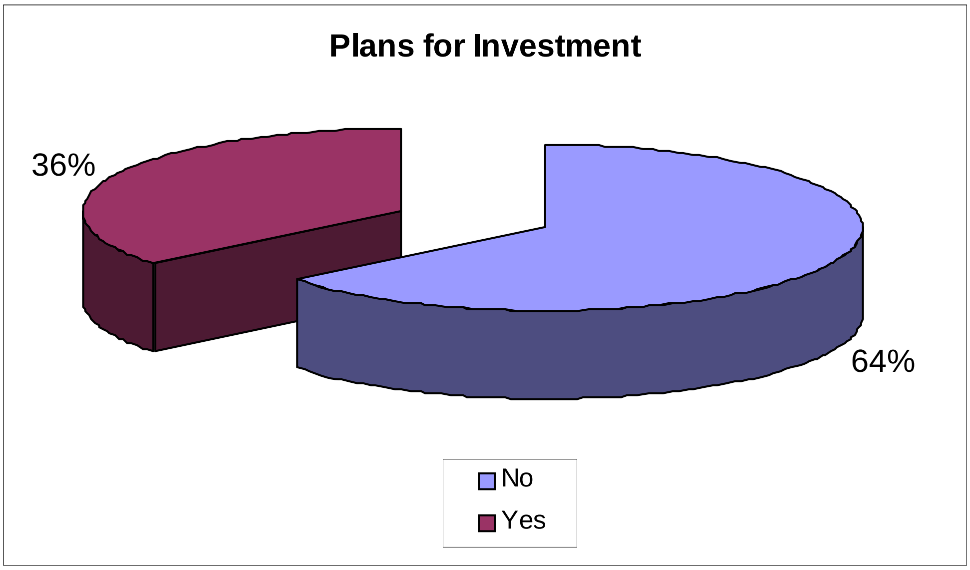
**Question 8 - Are you satisfied with your Accommodation?**



**Question 9 - Given the choice what would your optimum unit size be?**



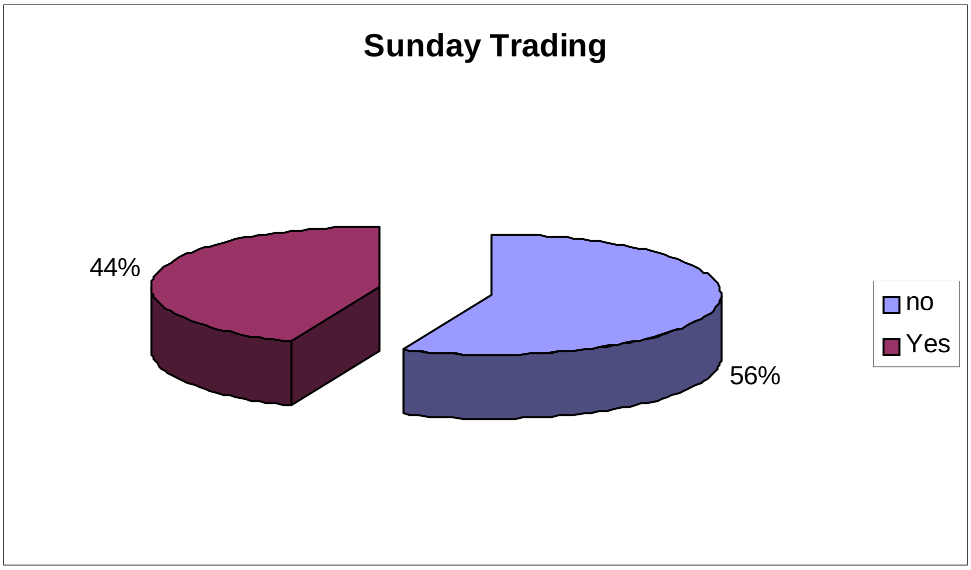

**Question 10 - Do you have any plans for investment?**



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

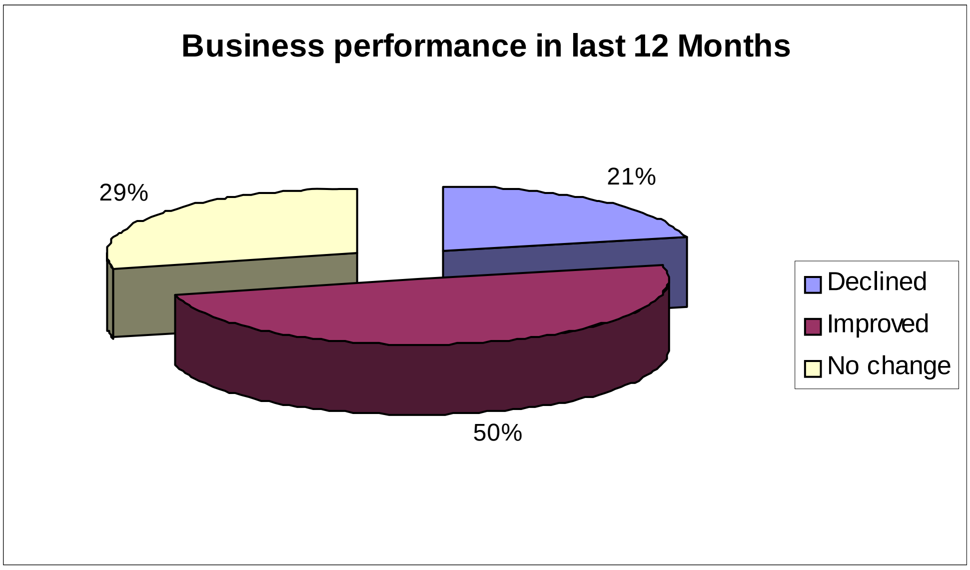
Responses received to this question were few although we identified that two firms are looking to expand, one firm is considering closing its business over the next two years, and one company is considering relocation within Cross Hills.

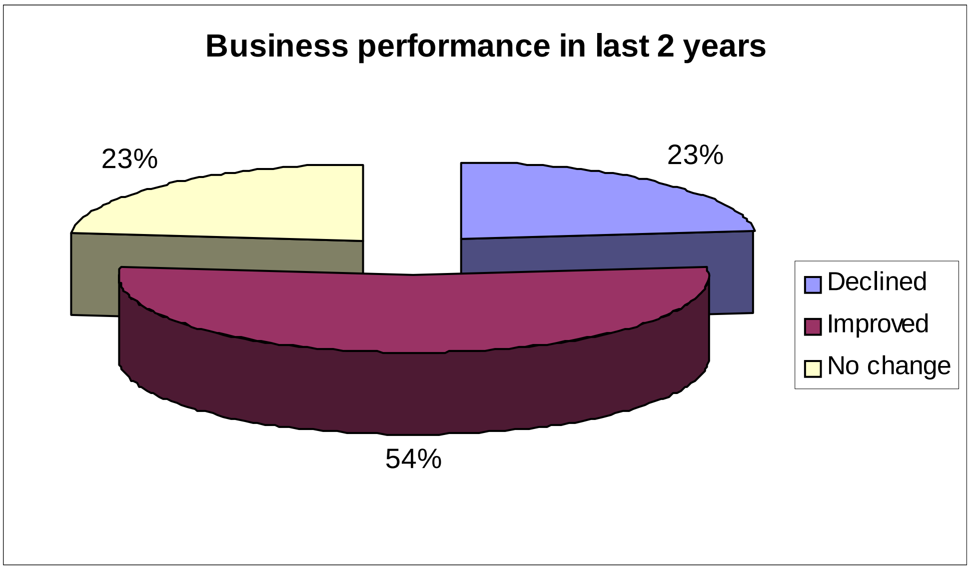
**Question 12a - Do you currently trade on Sundays?**




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

**Question 14 - Has your business traded better, worse or about the same in the last twelve months and two years?**





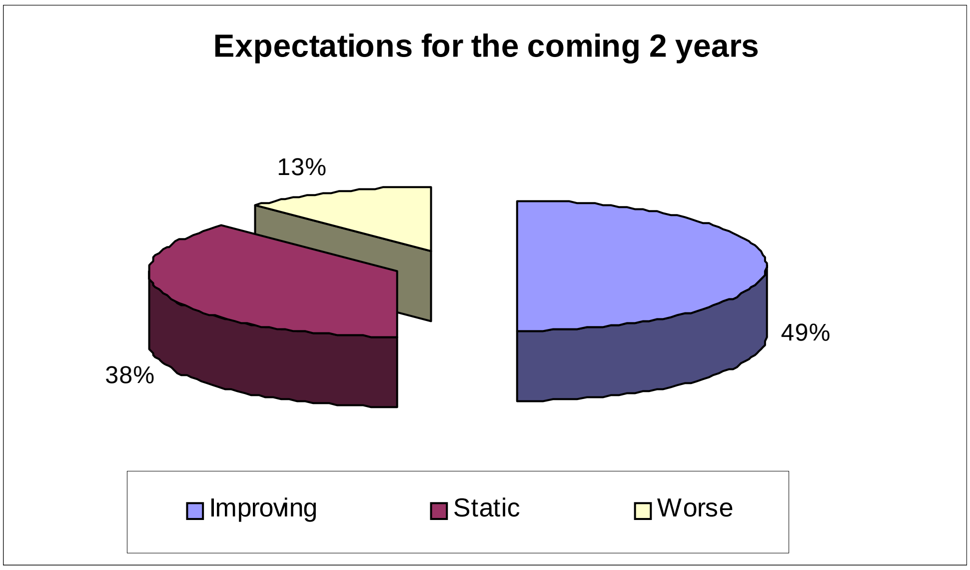

**Question 15 - If you have experienced a change in turnover during either of these periods, can you identify any particular reason?**

Reasons given for improvement include:

- Growth in residential accommodation locally;
- Refurbishment to the main area of the shop;
- Increase in local home/hand made products and some wholesale trade; and
- Quality of Service.

Reasons given for decline include excessive competition, fallout from the Foot and Mouth Disease, competition from bigger town stores, and a reduction in the spending power of the general public. One respondent believes that more people shopping in retail parks and large 'one stop' shops has resulted in a decline in turnover.

**Question 16 - What are your expectations for the next 2 years?**

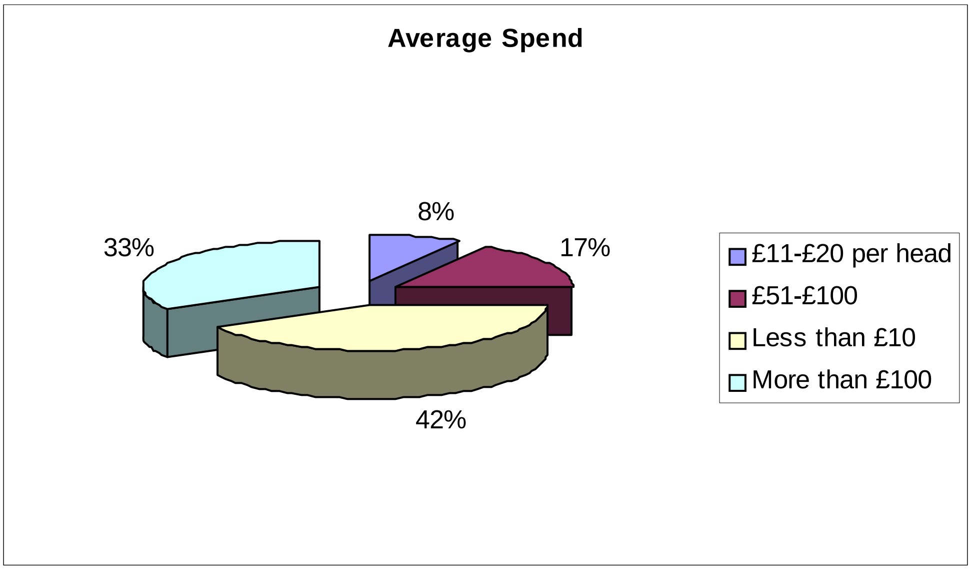


**Questions 17 – 19: These questions relate to the respondents' knowledge of their customers.**

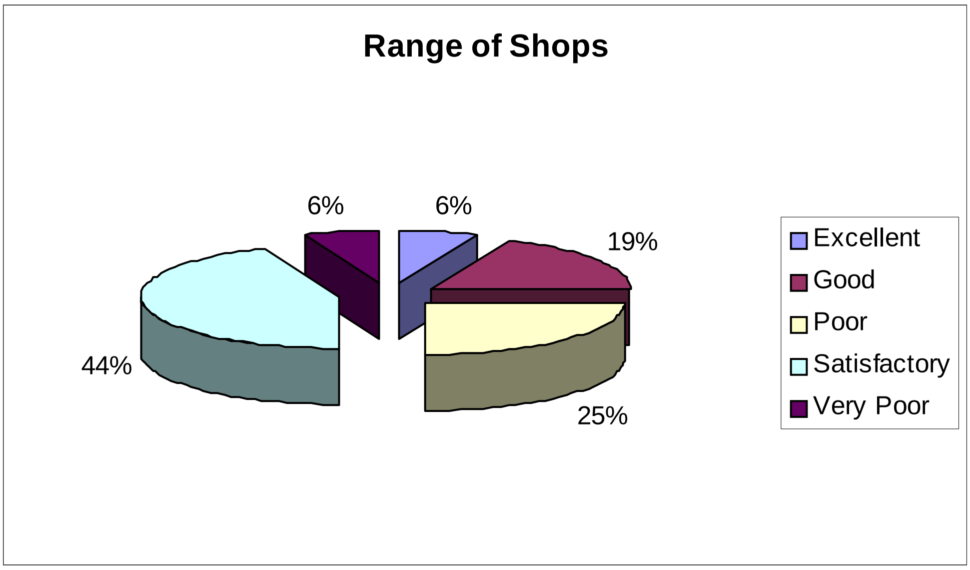
The majority of respondents are well aware of where their customers come from and what proportion are regular, occasional, passers-by or tourists. 5 businesses benefit from customers of all types, a further 5 find their trade is almost entirely from regulars. 4 companies benefit from both regular an occasional customer. The other respondents are patronised by a combination of one or more category of customer.

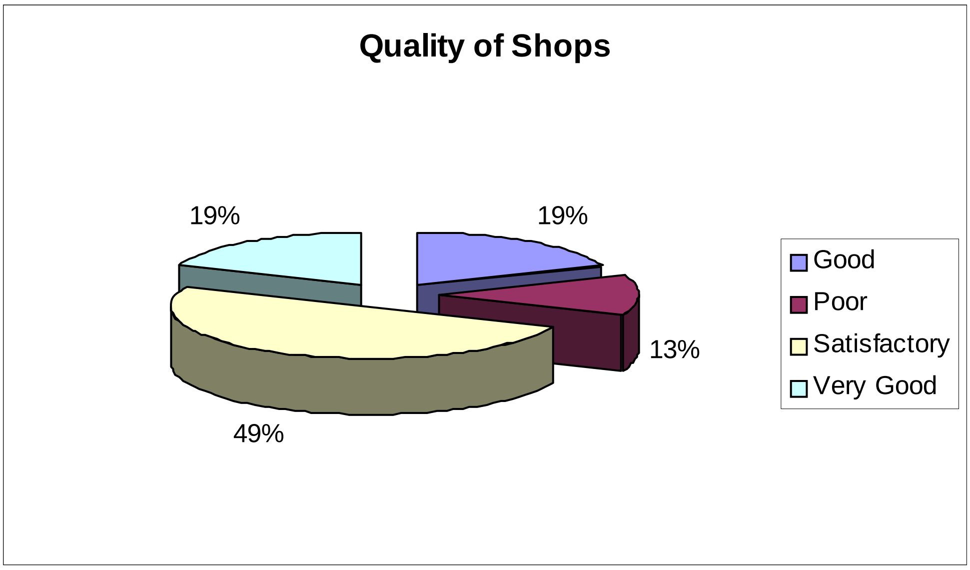
Question 18 concerned how far customers travel to visit the business. On average, 30% of customers travel less than 1 mile, 24% between 1 and 2 miles, 25% between 2 and 5 miles and 20% more than 5 miles. This reflects both the rural nature of Skipton and also the boost the town receives from tourism.

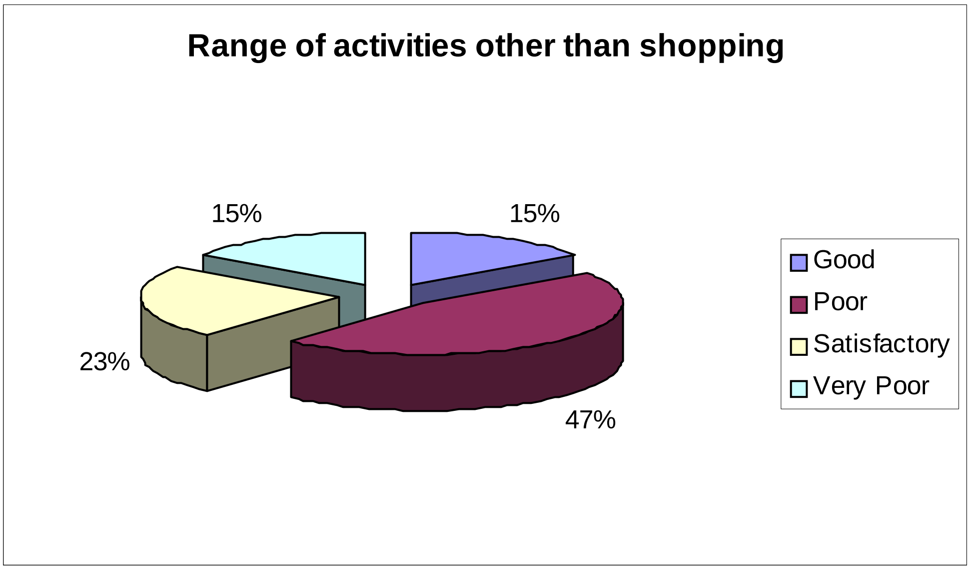
**Question 19 - Average customer spend?**

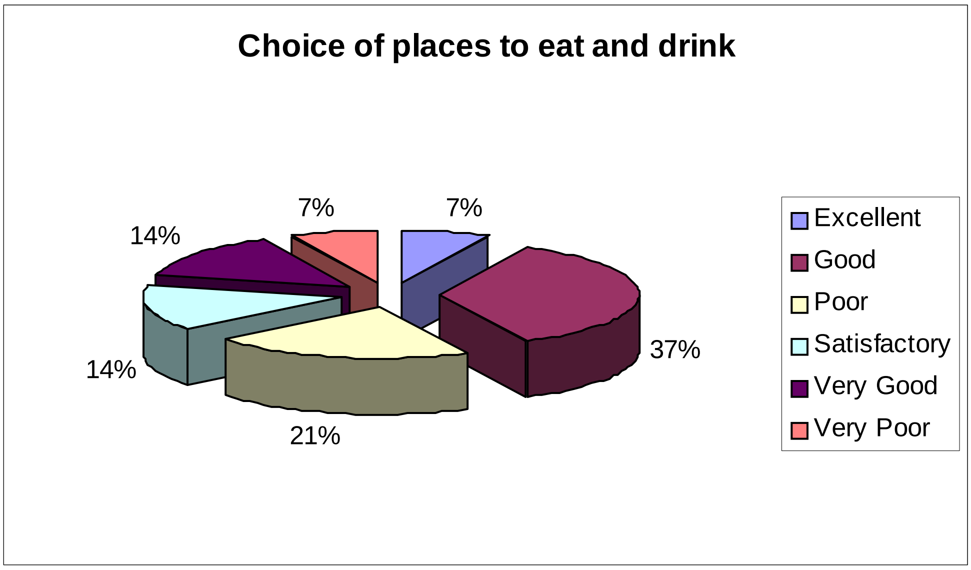


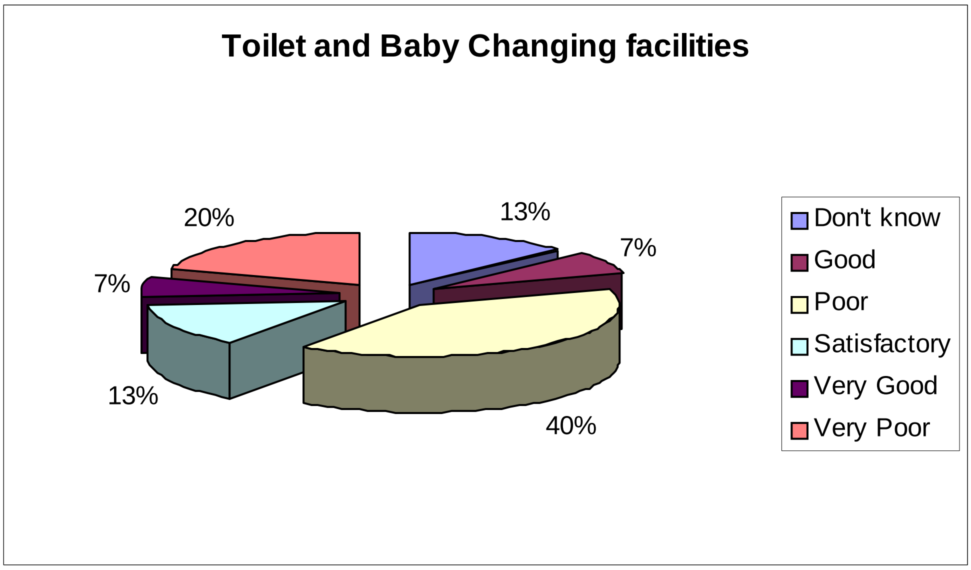
**Question 20 - This question asked respondents to rate a number of aspects of Cross Hills.**

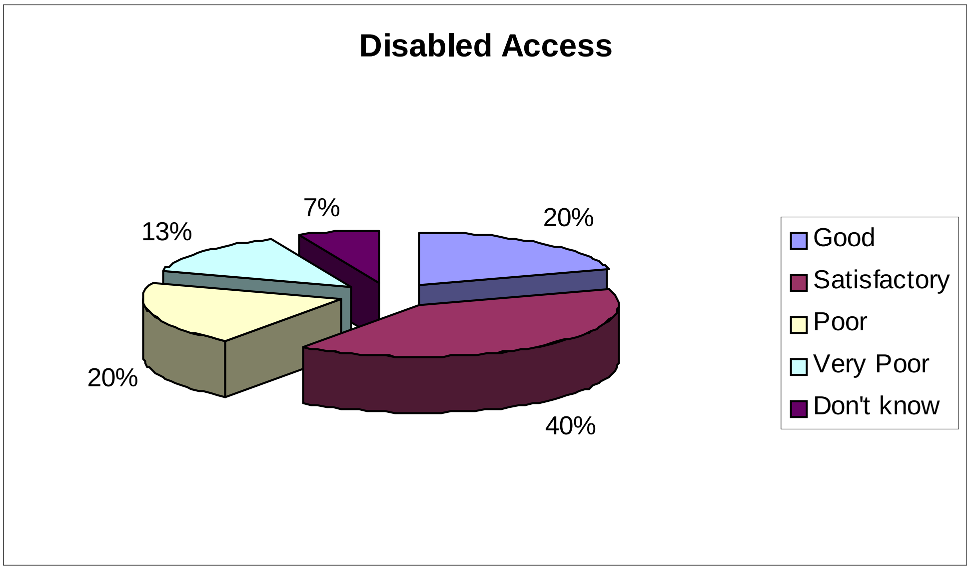


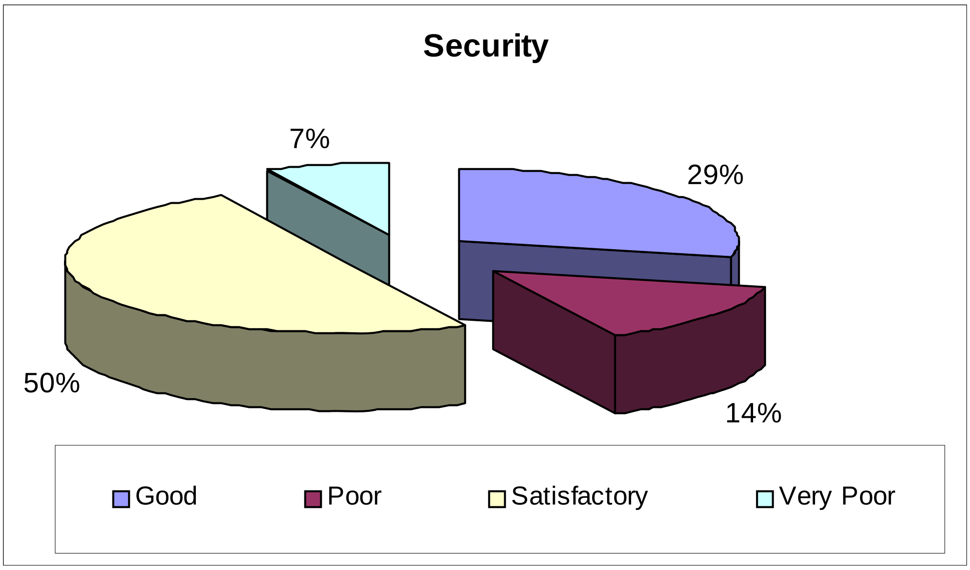



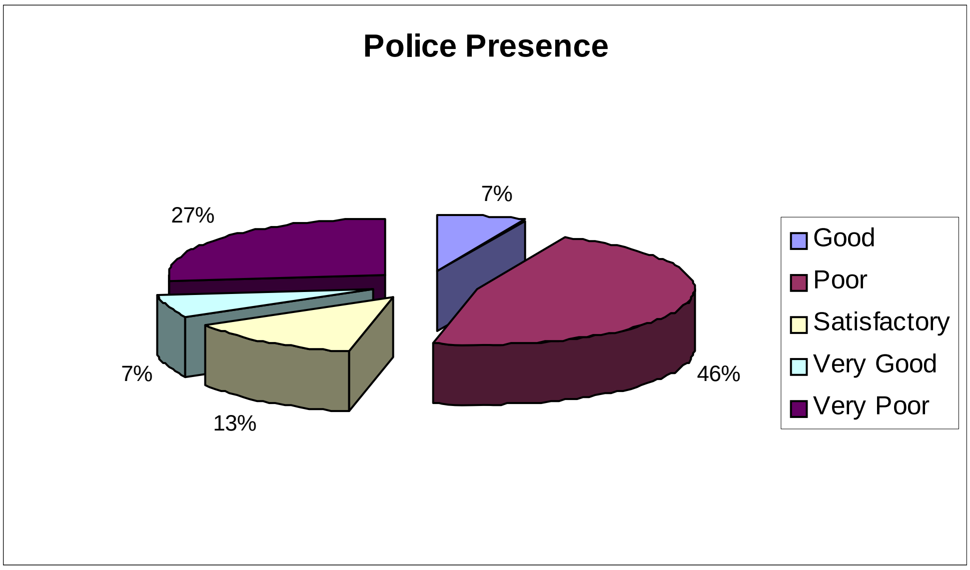

Range of activities other than shopping
15%
15%
23%
47%
Good
Poor
Satisfactory
Very Poor

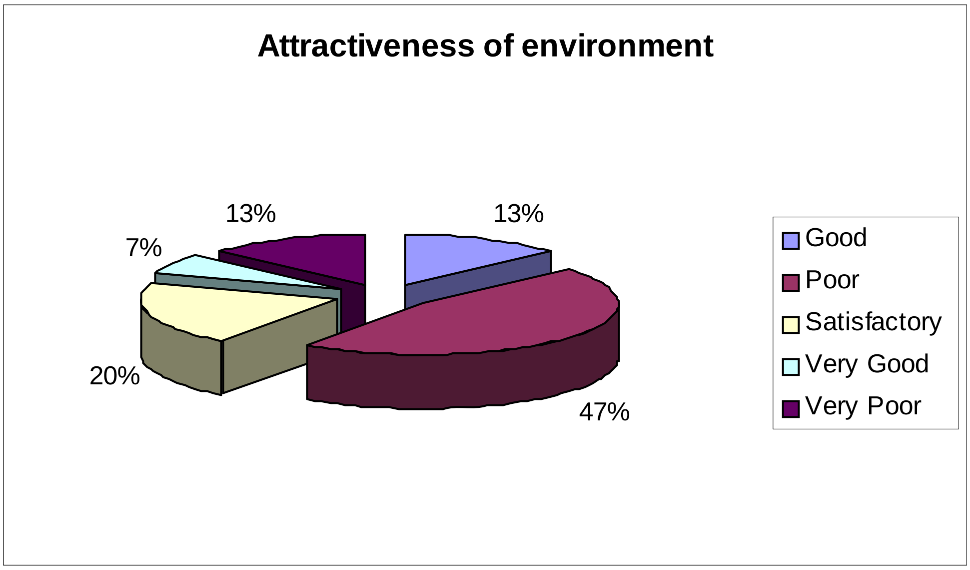

Choice of places to eat and drink
7%
7%
14%
14%
37%
21%
Excellent
Good
Poor
Satisfactory
Very Good
Very Poor

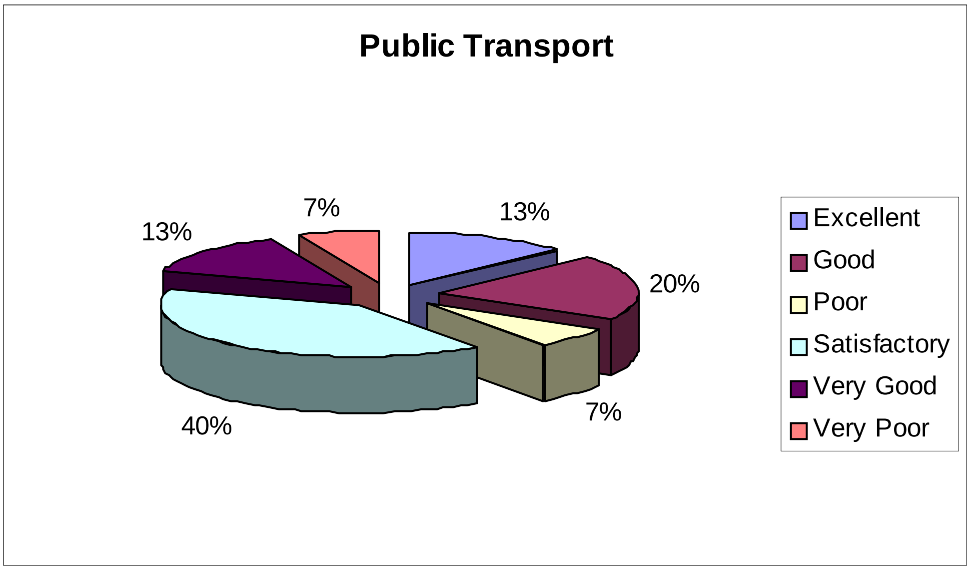

Toilet and Baby Changing facilities
20%
13%
7%
7%
13%
40%
Don't know
Good
Poor
Satisfactory
Very Good
Very Poor

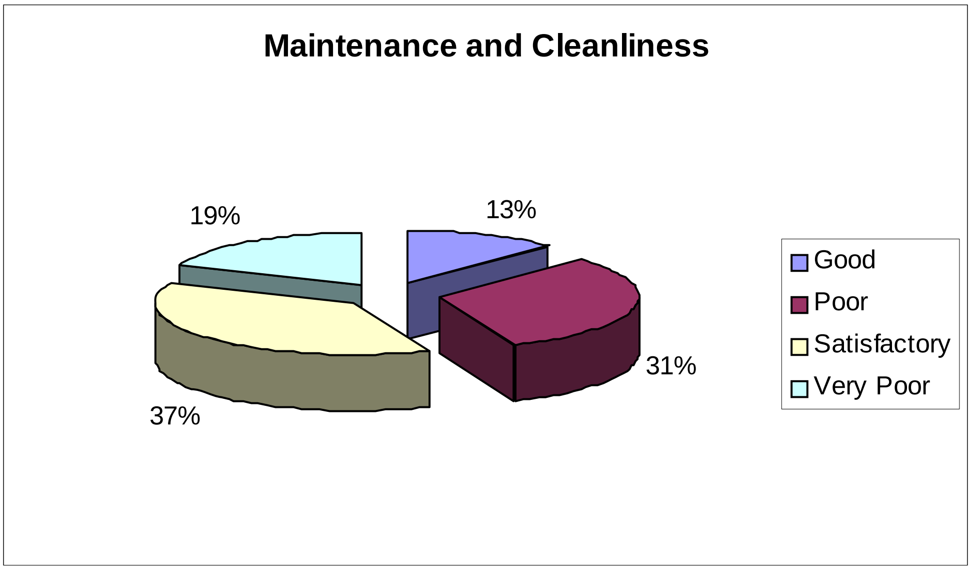

Disabled Access
7%
13%
20%
20%
40%
Good
Satisfactory
Poor
Very Poor
Don't know

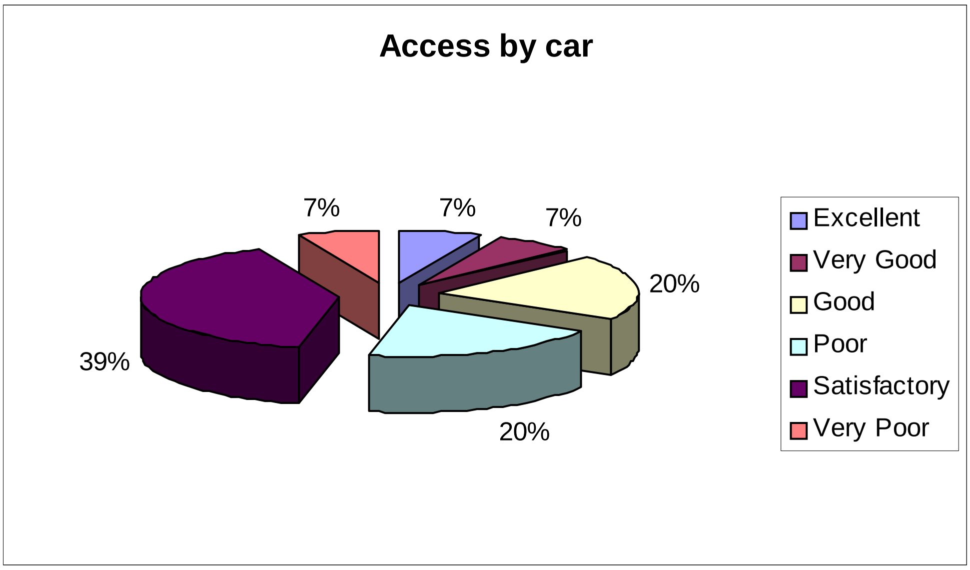

Security
7%
29%
50%
14%
Good
Poor
Satisfactory
Very Poor

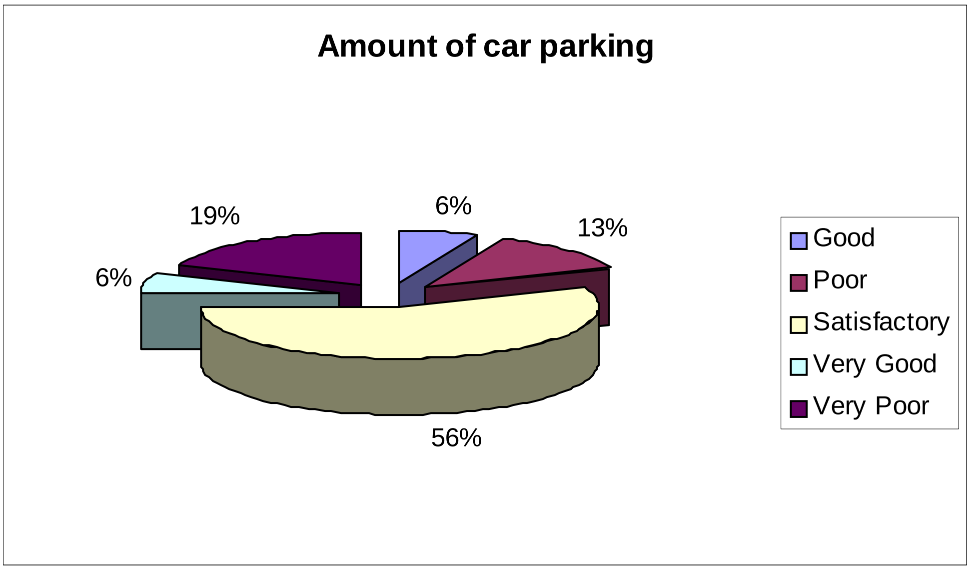

Police Presence
7%
27%
7%
13%
46%
Good
Poor
Satisfactory
Very Good
Very Poor


Attractiveness of environment
13%
13%
7%
20%
47%
Good
Poor
Satisfactory
Very Good
Very Poor


Public Transport
13%
7%
13%
20%
7%
40%
Excellent
Good
Poor
Satisfactory
Very Good
Very Poor


Maintenance and Cleanliness
19%
13%
31%
37%
Good
Poor
Satisfactory
Very Poor


Access by car
7%
7%
7%
20%
39%
20%
Excellent
Very Good
Good
Poor
Satisfactory
Very Poor


Amount of car parking
19%
6%
13%
6%
56%
Good
Poor
Satisfactory
Very Good
Very Poor

**Questions 21-23. These asked respondents to comment on strengths and weaknesses in Crosshills and also potential improvements which could be made.**

## Strengths

- *Quality of shops, convenience.*
- *Major raod to Lancashire - brings trade. Loyal local cutomers.*
- *Adequate car parking. Friendly village atmosphere.*
- *It is an excellent residential area, this gives strength to the shopping outlets.*
- *Plenty of shops offering a wide range.*
- *Nice location good main street village shopping.*
- *Personal service. High quality specialist foods/butchers. High quality advice for service industries.*
- *All are independent traders who are happy to oblige customers and give advice on items for sale*

## Weaknesses

- *Inadequate policing. Plenty of young yobs hanging around public toilets and car park Vandalism. The general cleanliness in town is poor.*
- *Lots of road works. Less practical shops ie more fancy ones. Traffic congestion.*
- *Very limited range of shops.*
- *Main street becomes too congested with traffic passing through.*
- *Major weaknesses litter. Due to school kids at dinner times. Inadequate car parking.*
- *Lack of parking, at the South end of the village.*
- *Closure of retail premises, especially greengrocer.*
- *Lack of parking areas.*
- *No where for the younger end (ie. 10-16 years) to go.*
- *Lack of car parking*
- *Litter, traffic congestion.*
- *Lack of quality shops and poor road signs to Cross Hills.*
- *Too much through traffic, resulting in difficulty for customers often, not only to park but to actually get here!*
- *Limited choice*

## Improvements

- *More businesses with more employees.*
- *More bins.*
- *Development of a Community Centre.*
- *Improved parking.*
- *Effective traffic speed management.*
- *More pedestrian access.*
- *More car parking and more supervision of school kids at lunchtimes.*
- *More car parking near my shop.*
- *More Police protection for our premises when pubs. Close of Friday nights and weekends. I have had 2 windows smashed in a period of less than one month.*
- *More car parking.*

**Question 24 - Do you wish to make any other comments about Cross Hills?**

Three respondents have made additional comments about Cross Hills, as set out below.

*'The main street could be made to look more attractive if the local Council encouraged businesses to do so, grants could be given to make it more environmentally friendly.'*

*'Crosshills reflects the problems faced by all small towns and villages ie. people are now brainwashed into thinking that the only way to shop is by car, to a one stop multipurpose retail park. I feel that unless parking is made available the progressive decline of small business is inevitable.'*

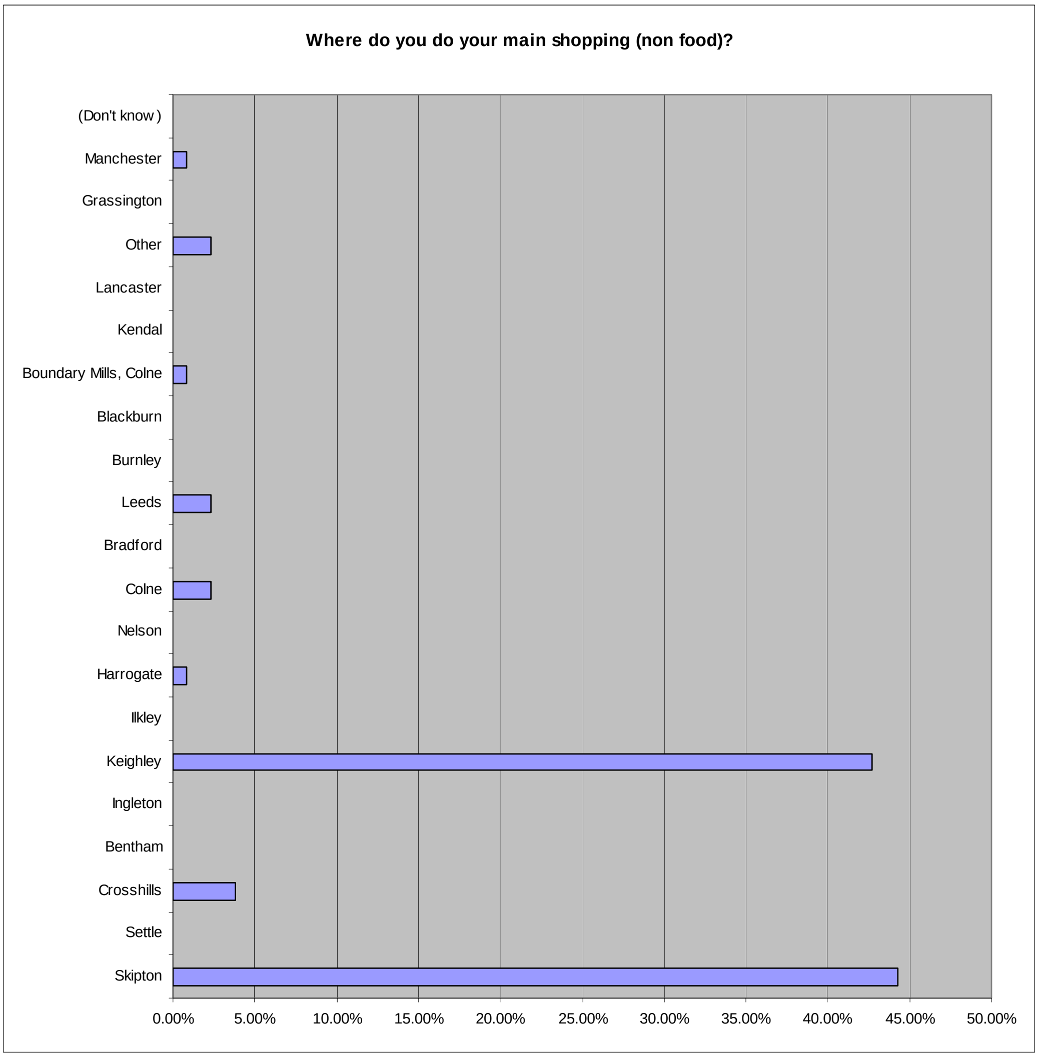
*'Better Policing of village, also to be able to contact Police more easier (instead of being transferred to York than back to Skipton) should be able to contact Crosshills Station direct, local community fought long and hard to reopen. Should now consider again about By-pass with the amount of traffic which goes through the village. Should be a 30 mph zone through out and not just certain streets.'*

## Appendix 3 – Street Survey Questionnaire and Analysis

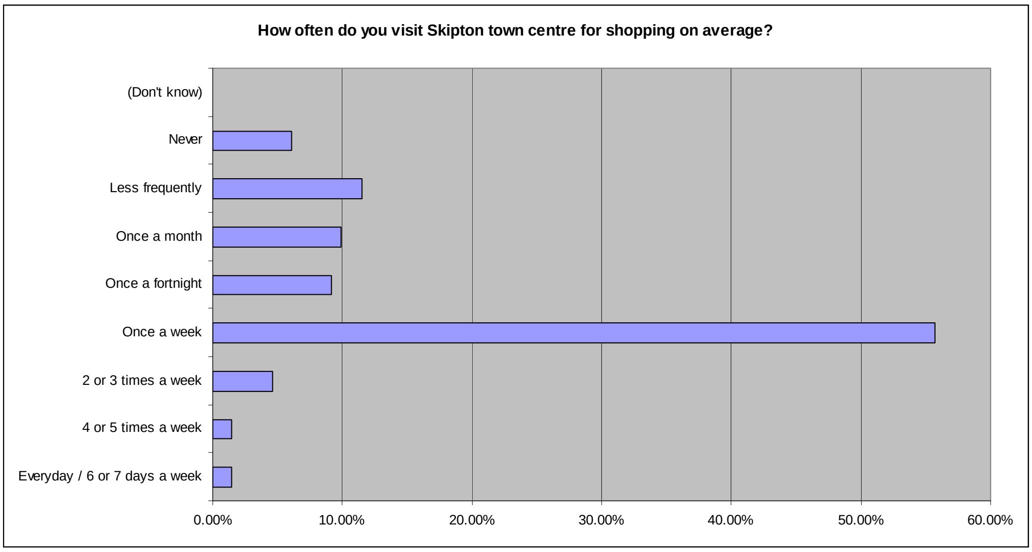
# Appendix 3 - Telephone Survey Analysis

The following is an analysis of the responses to the household (telephone) survey made by residents of Zone 1 (Cowling, Glusburn and Sutton-in-Craven Wards). We have excluded most of the responses which are not relevant to the performance of Cross Hills.

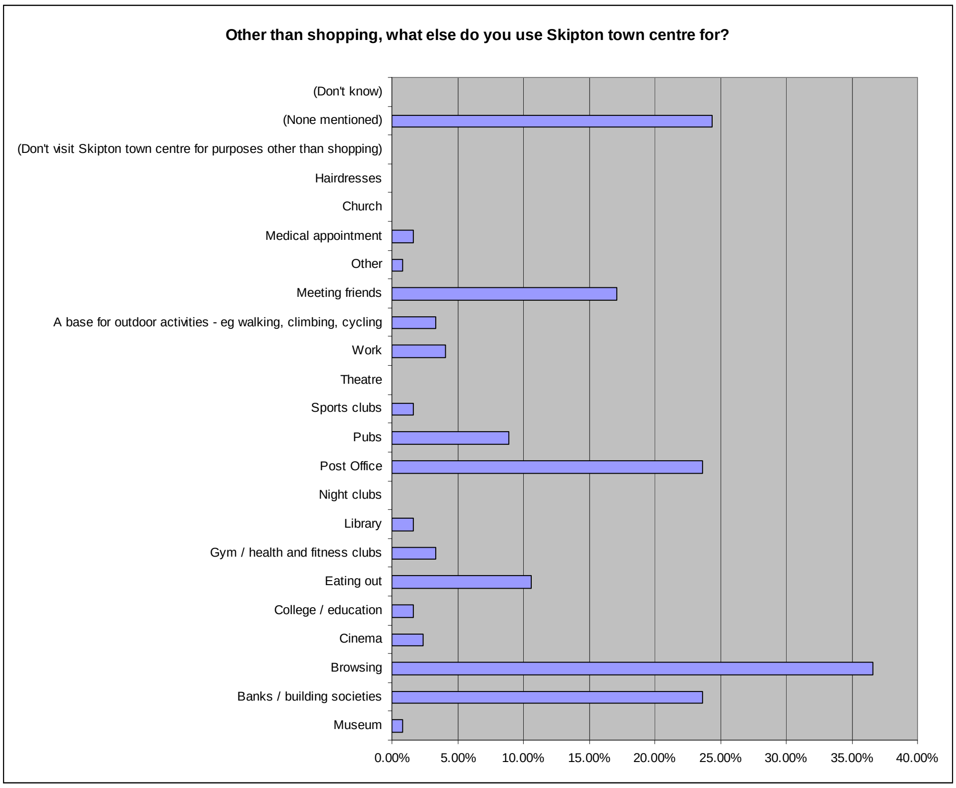
### Question 1 - Leaving aside food shopping, where would you regard as your household's main shopping centre?



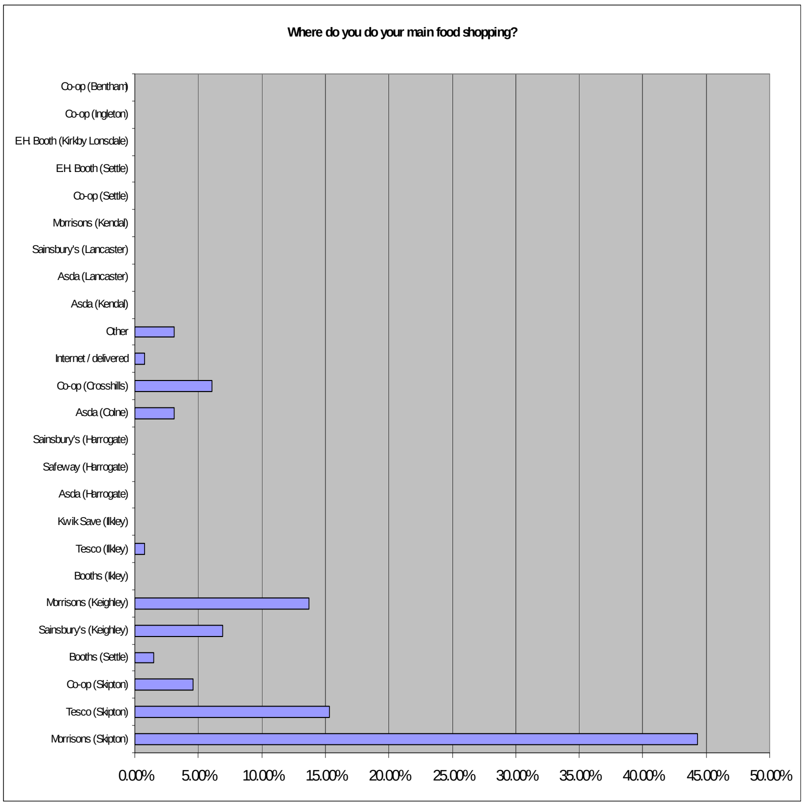
## Question 2 - How often do you visit Skipton town centre for shopping on average?



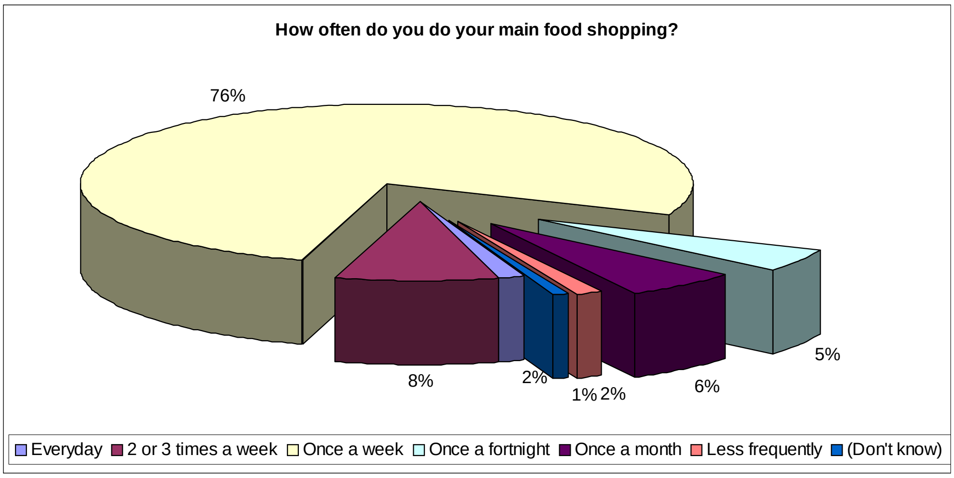
## Question 4 : Other than shopping, what else do people in your household use Skipton town centre for?



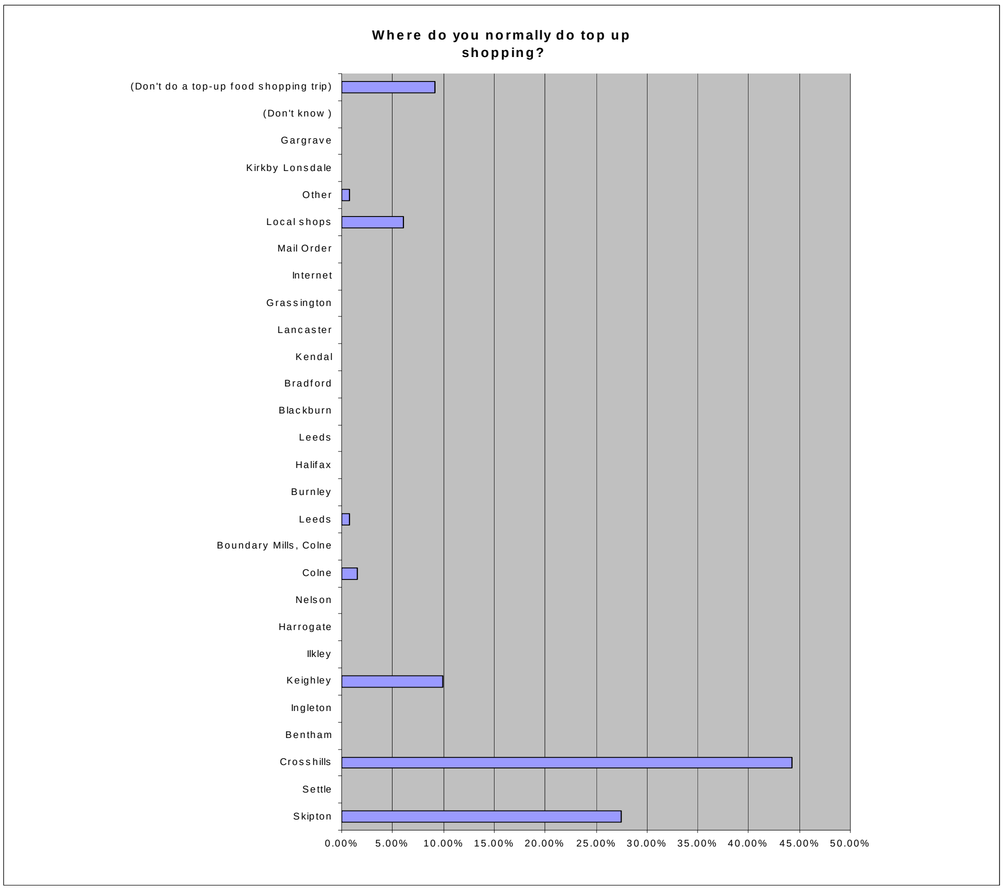
### Question 14: Where do you usually go for your household's main food shopping ?



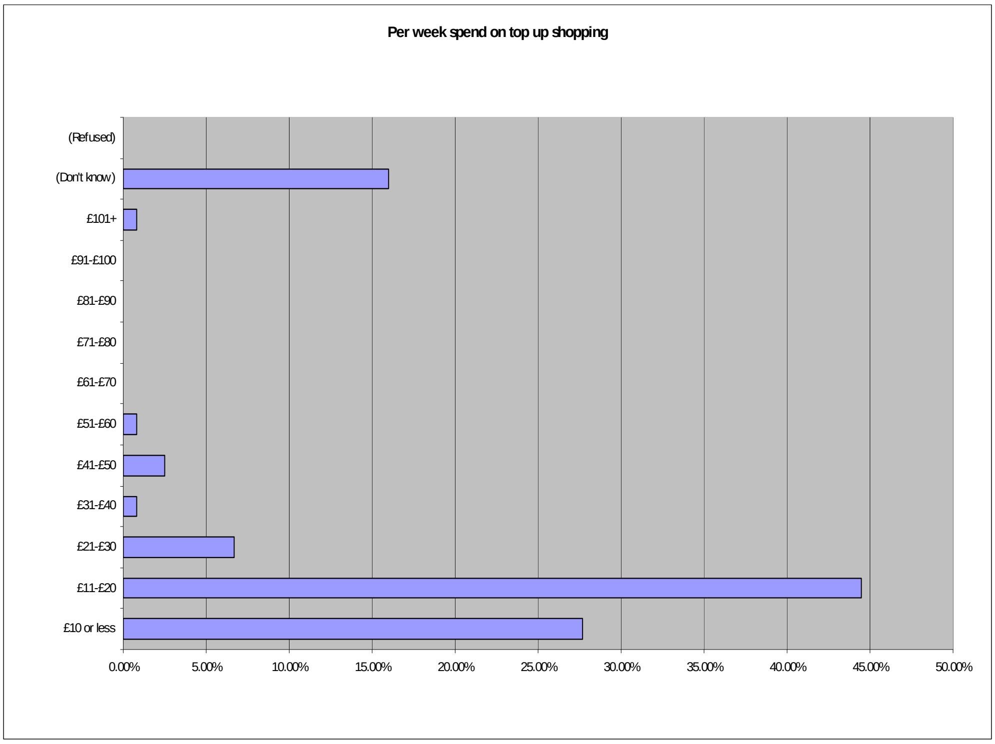
## Question 19 - How often do you do your main food shopping?



**Question 20 - Where do you mostly do any top-up food shopping (ie. Between main food shopping trips) ?**

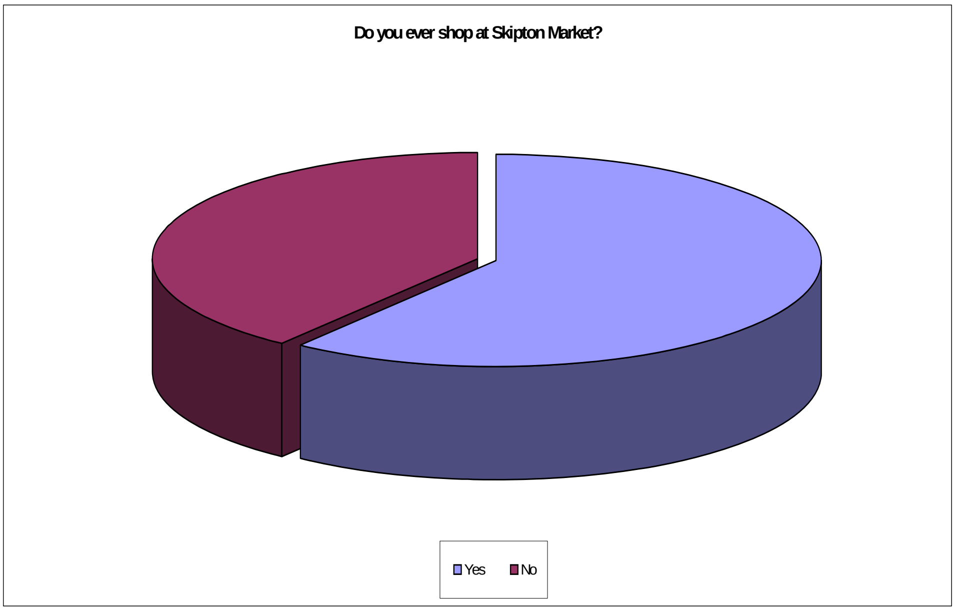


**Question 21 :About how much a week would you say you spend on your top-up shopping ?**

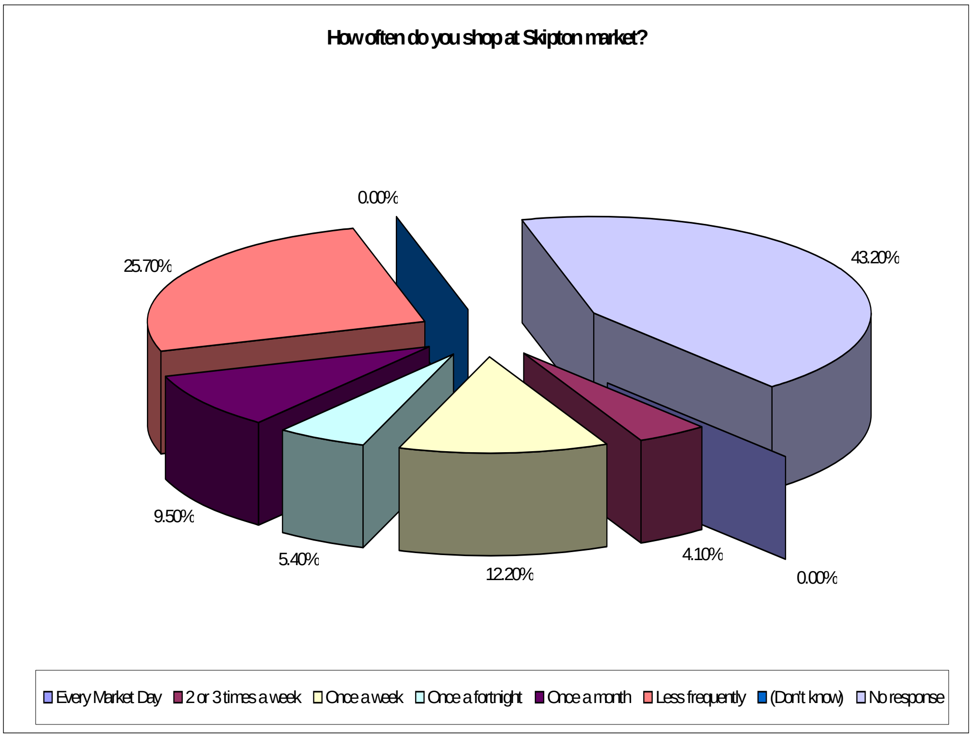


**The following two questions have been considered together with question 22 for comparison purposes.**

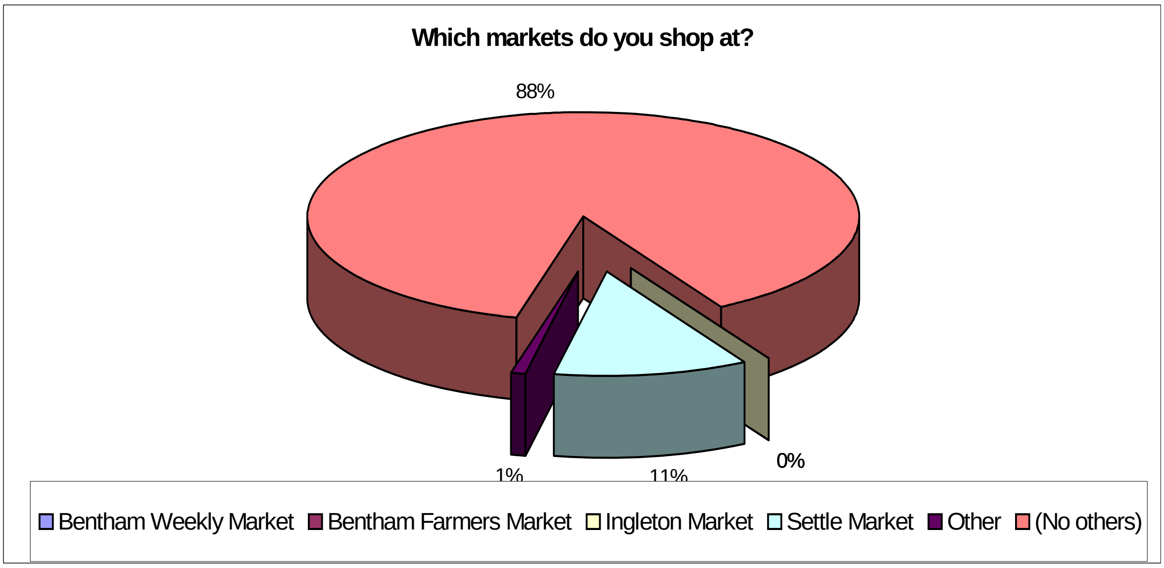
### Question 9 - Do you ever shop at Skipton market?



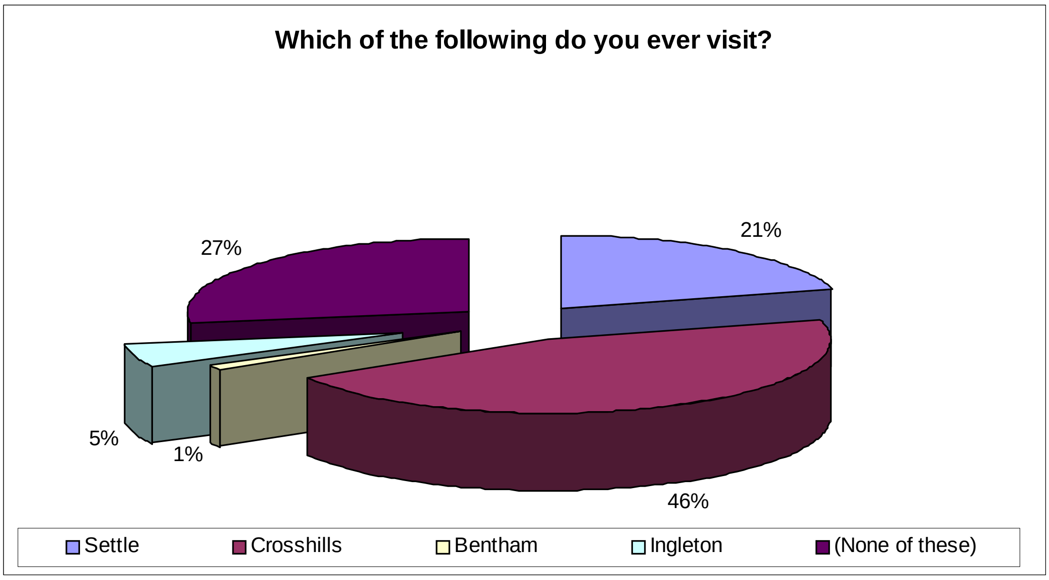

### Question 10 - How often do you shop at Skipton market ?



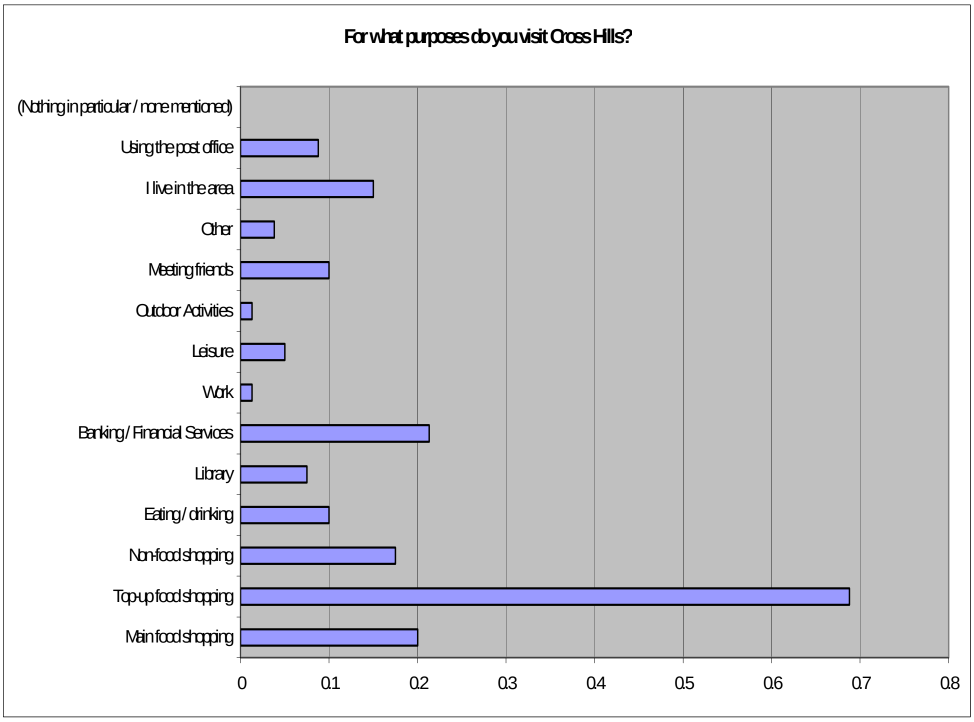
**Question 22 - Which of the following markets do you ever shop at ?**



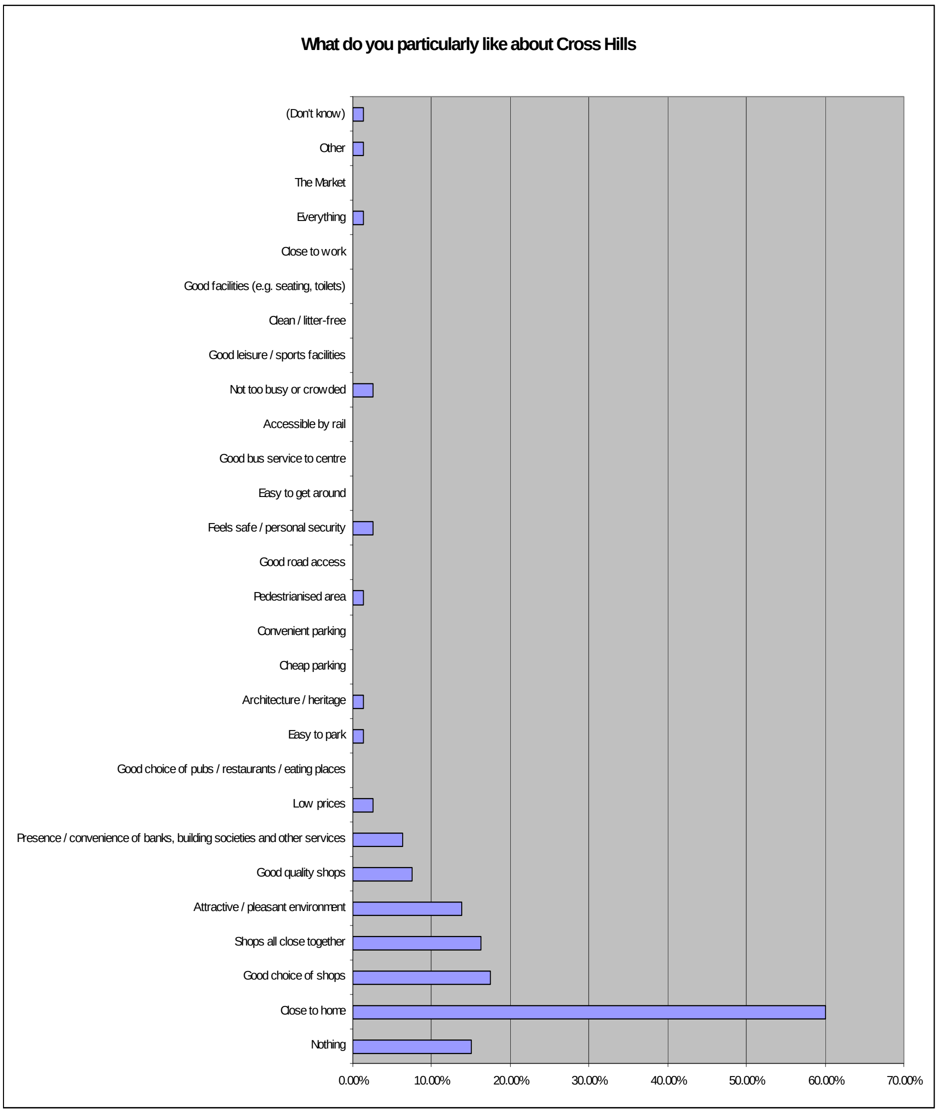

**Question 23 - Which of the following do you ever visit?**



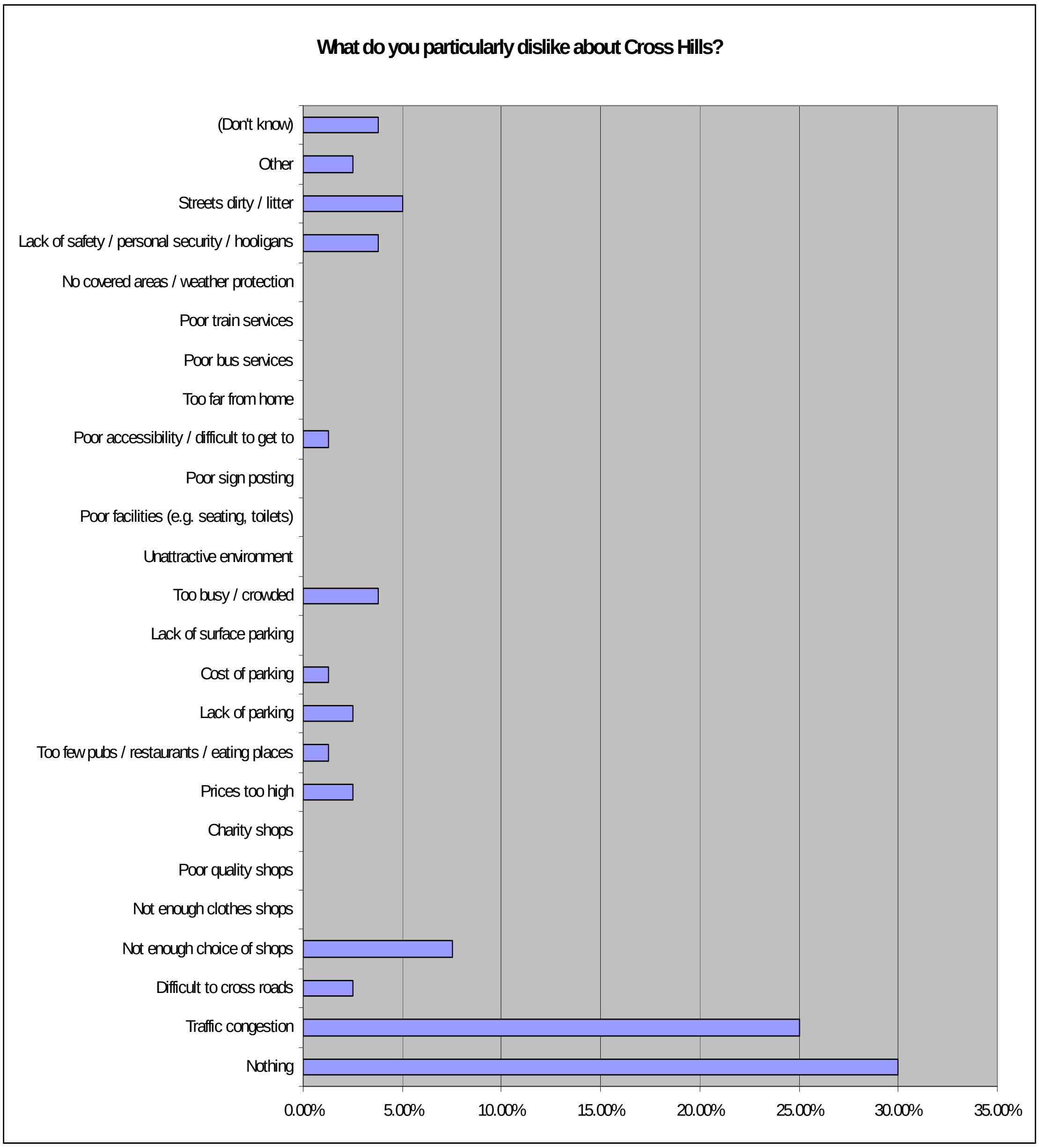
## Question 24B - For what Purpose do you visit Cross Hills?



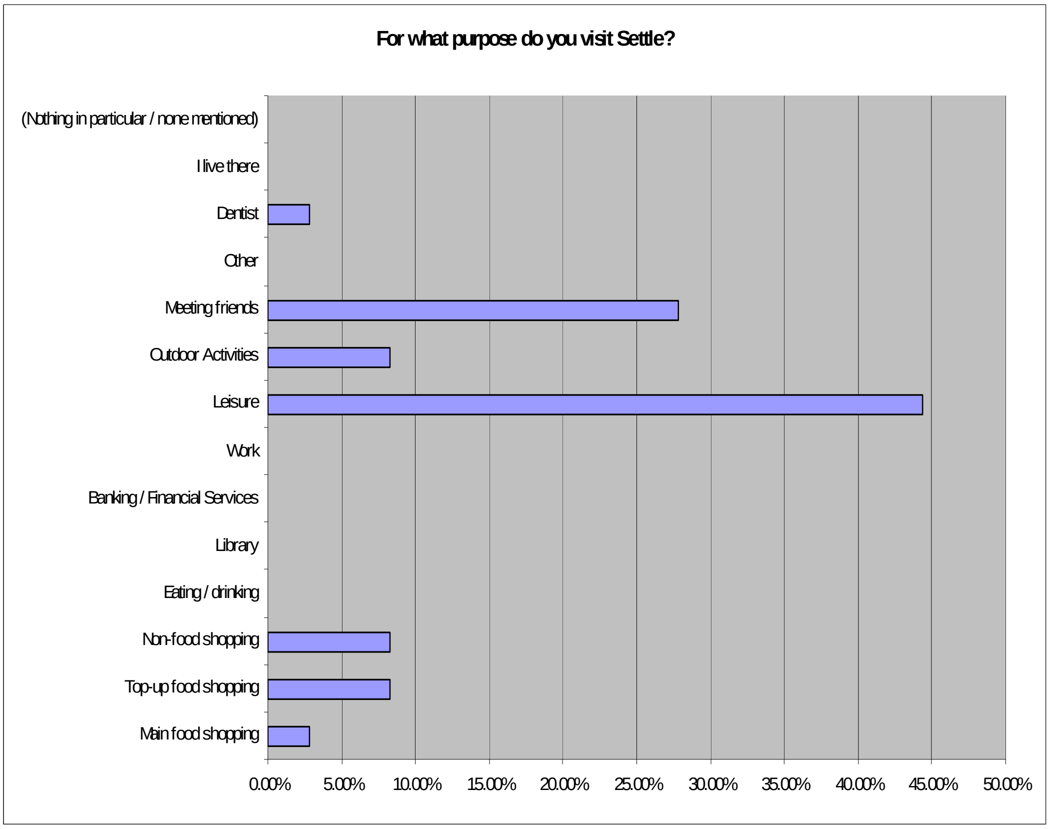
## Question 25B - What do you particularly like about Crosshills?



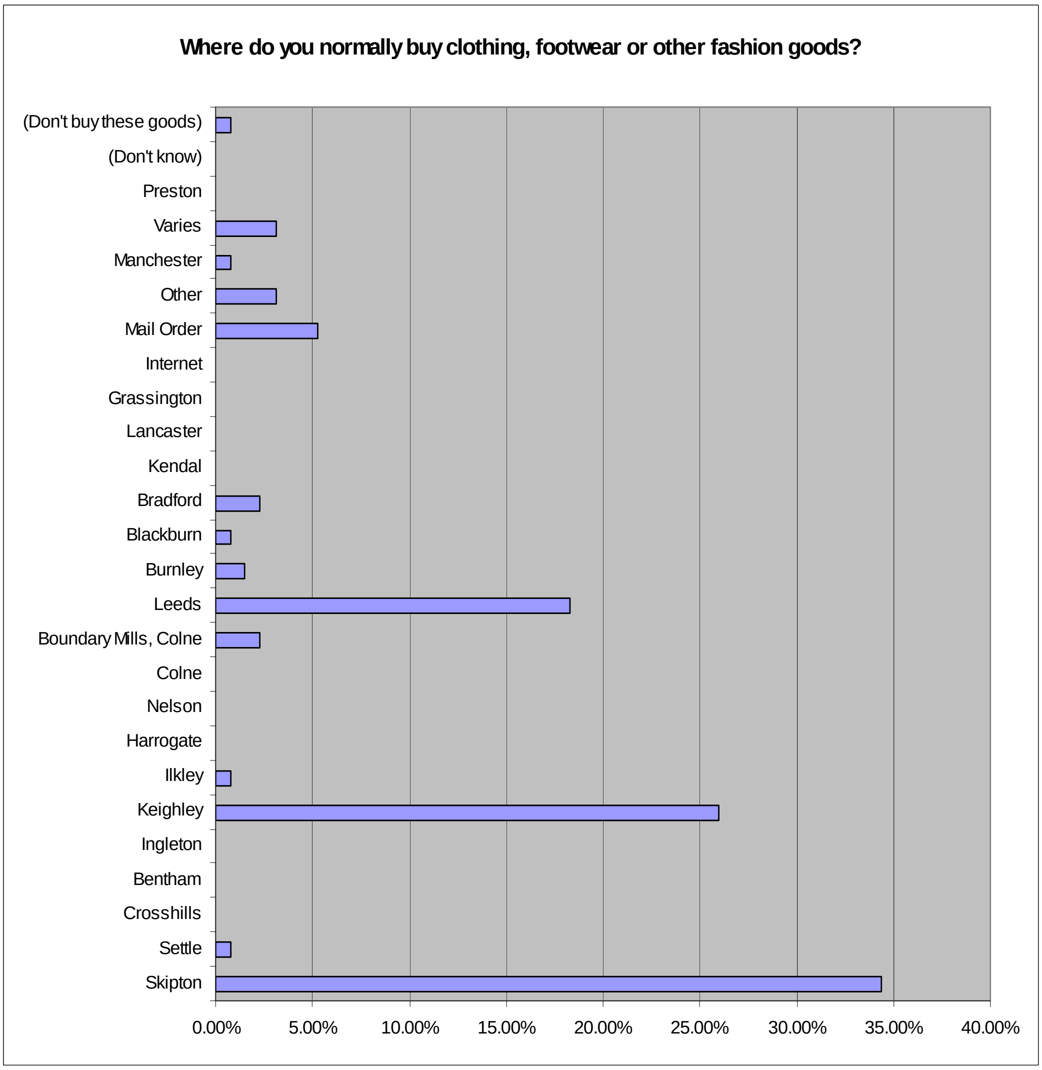
## Question 26B - What do you particularly dislike about Cross Hills?



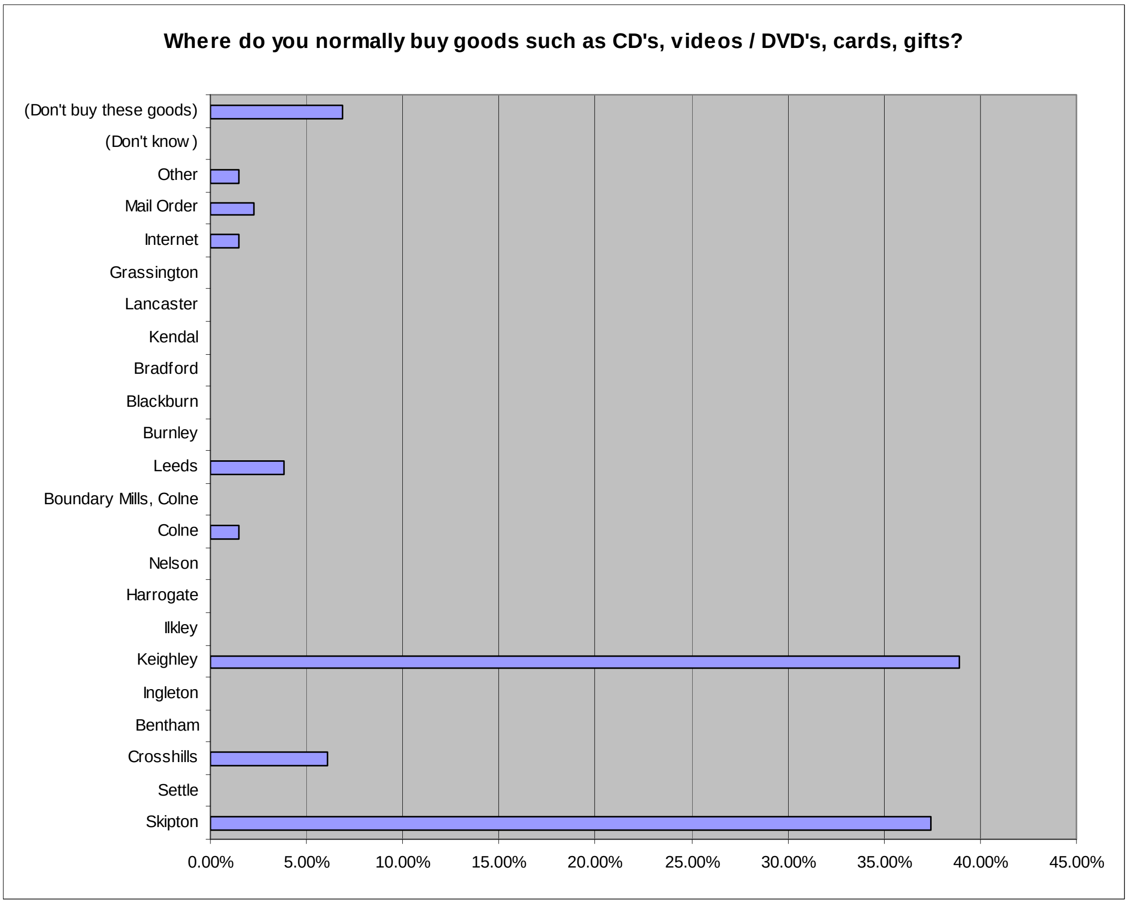
**Question 24A For what purpose do you visit Settle ?**



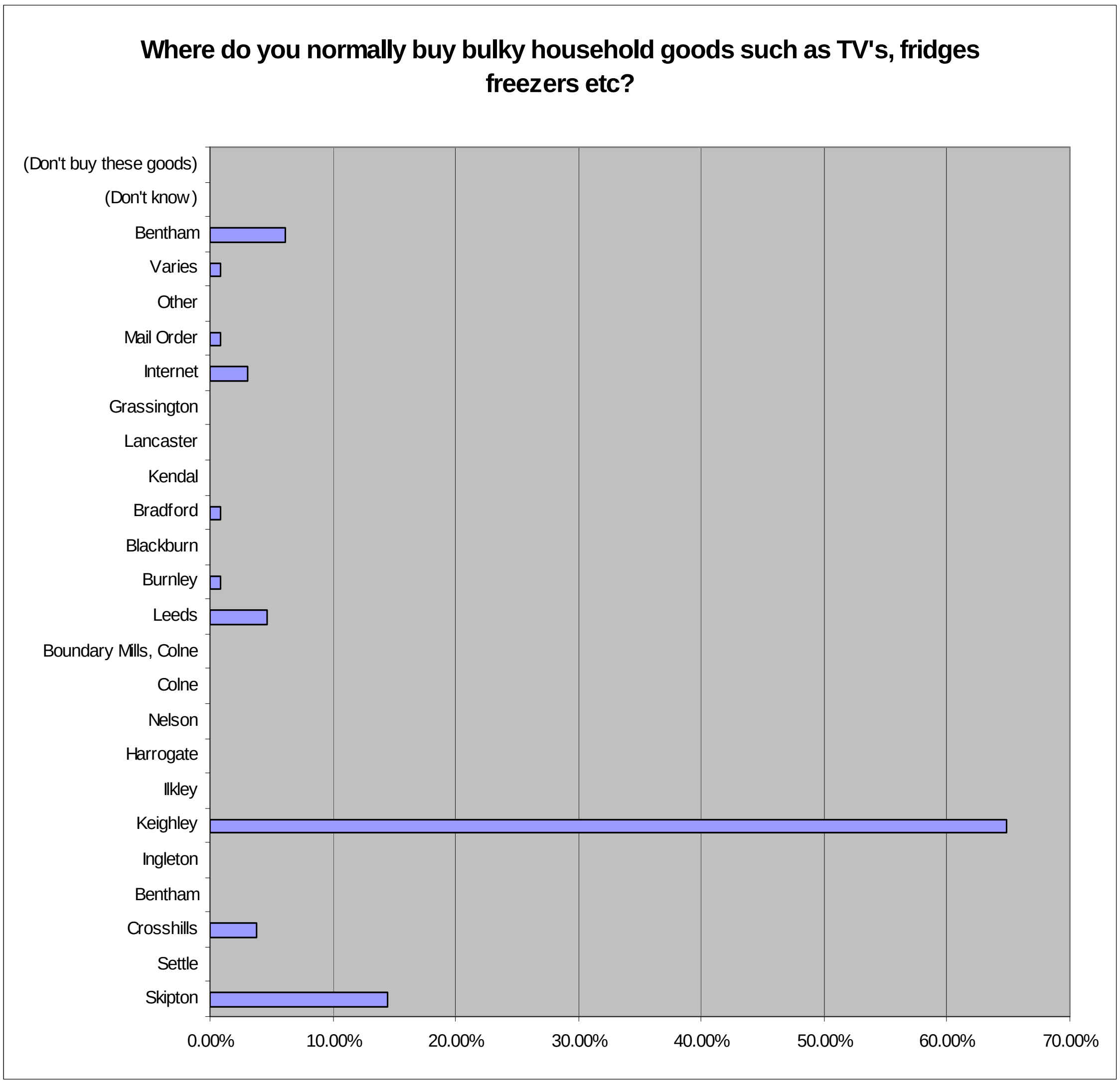
## Question 27: Where do you normally buy clothing, footwear or other fashion goods?



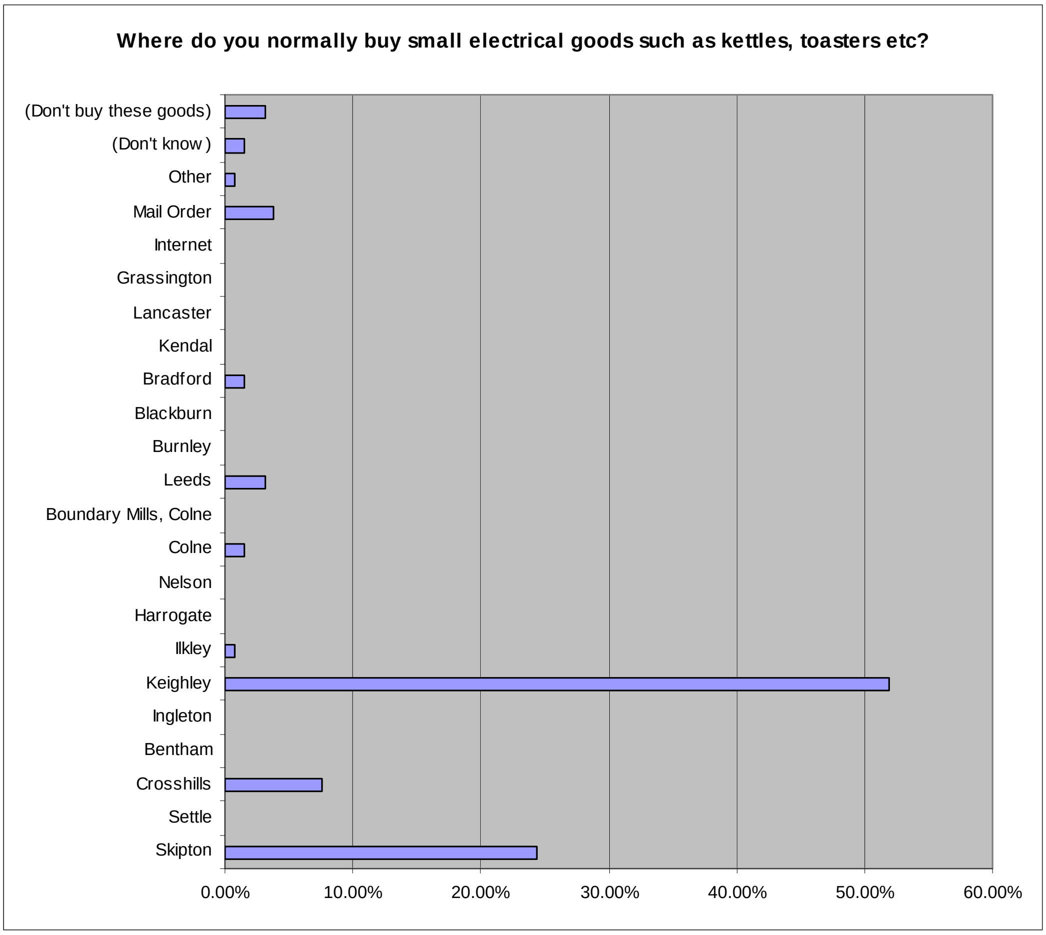
**Question 28 - Where do you normally buy goods such as CDs, videos / DVD's, cards, gifts?**



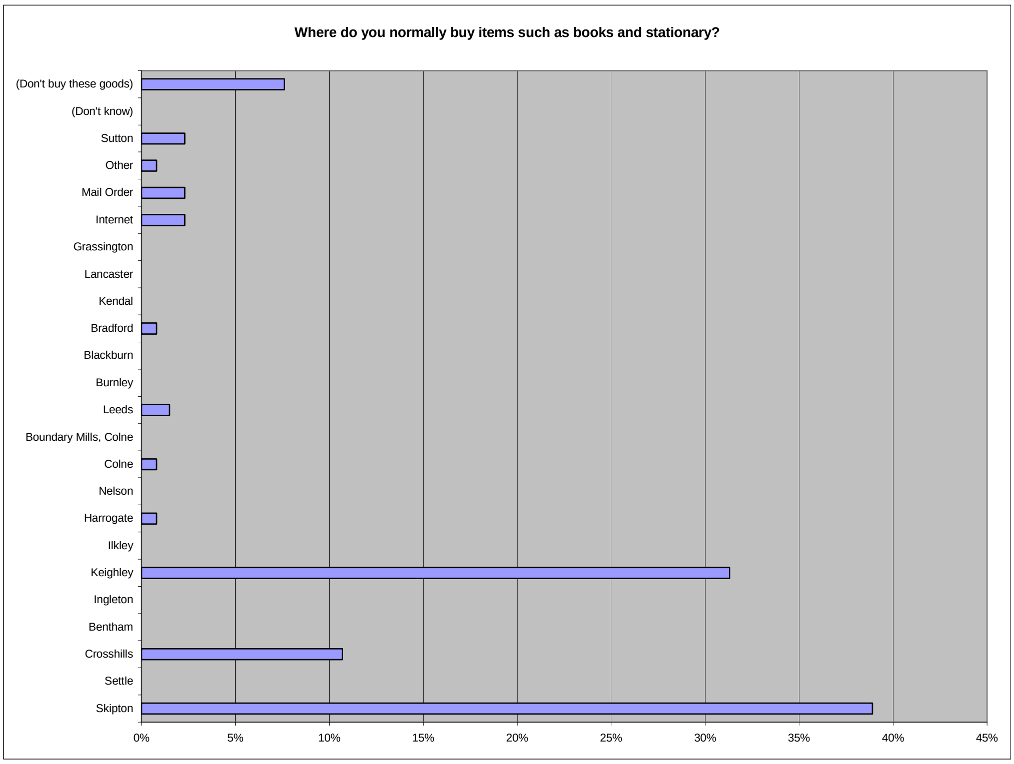
**Question 29 - Where do you normally buy bulky household goods such as TVs, fridges, freezers etc ?**



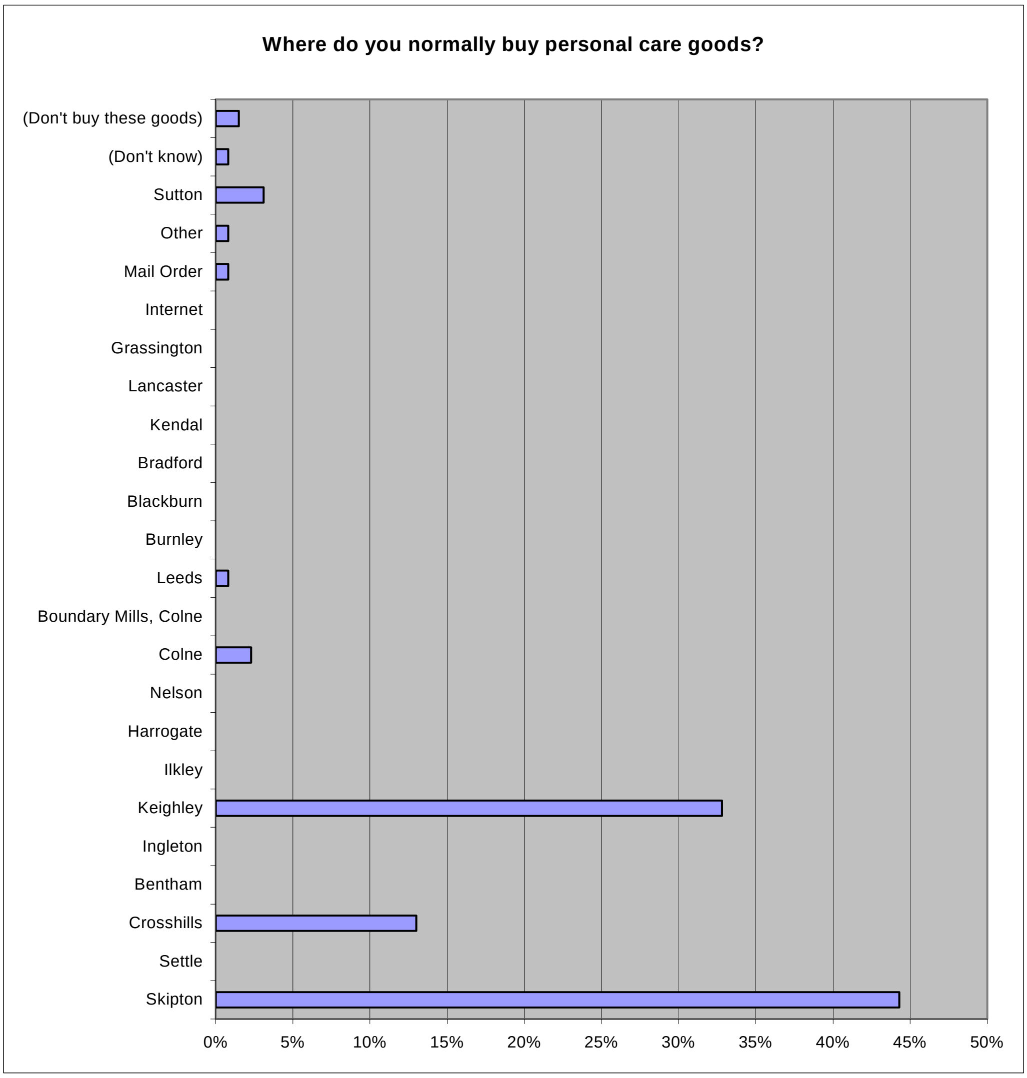
**Question 30 - Where do you normally buy small electrical goods such as kettles, toasters etc ?**



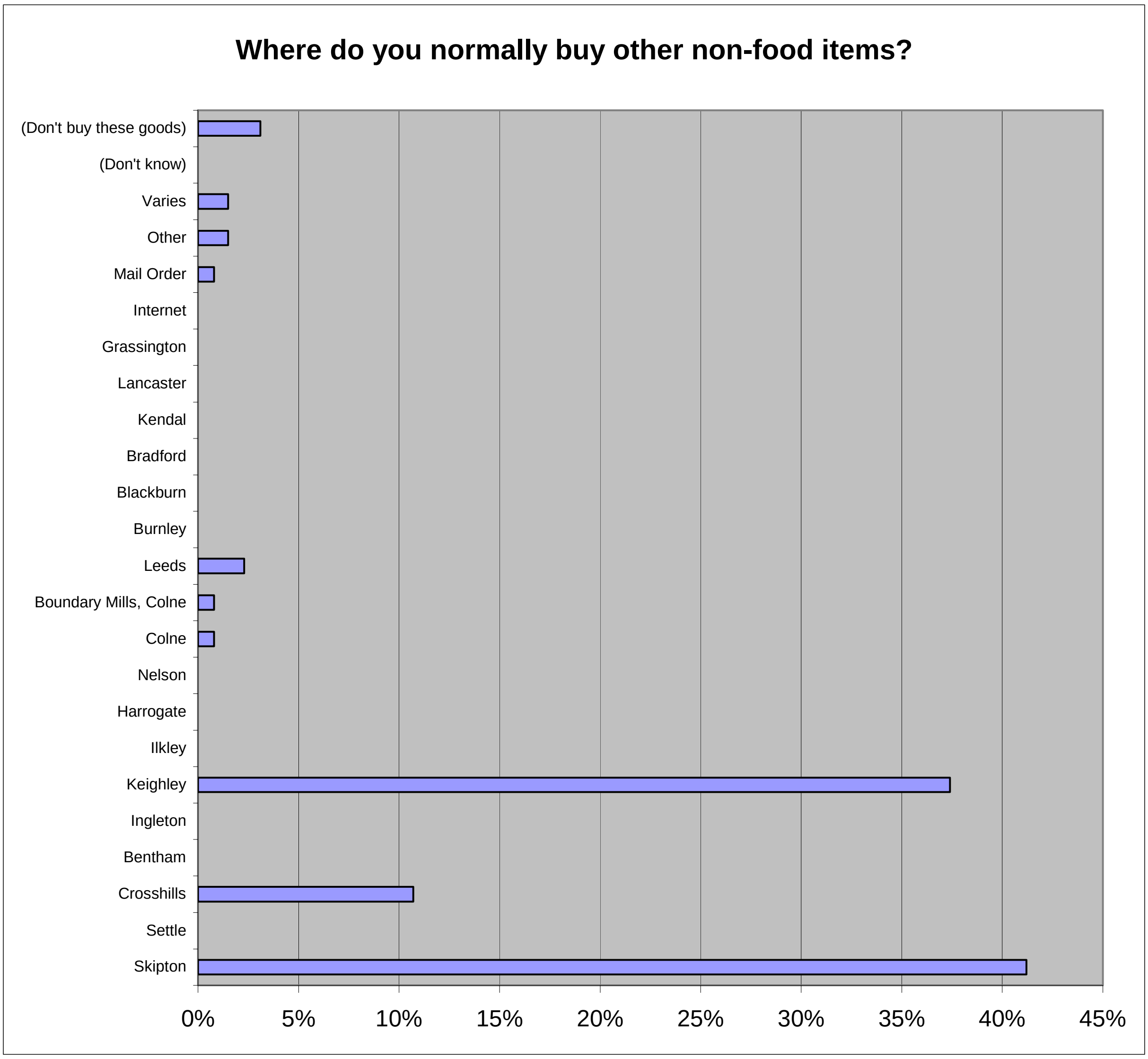
## Question 31 - Where do you normally buy items such as books and stationery ?



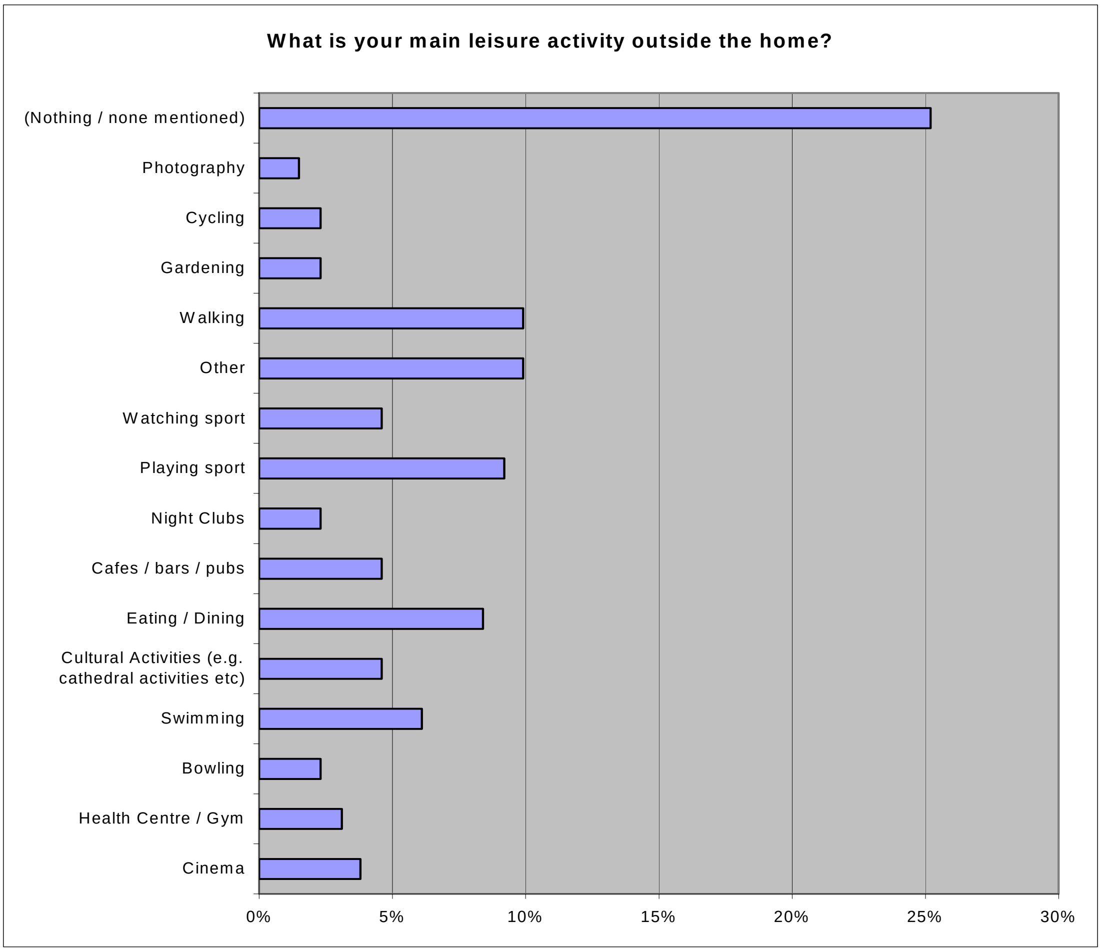
## Question 32 - Where do you normally buy personal care goods ?



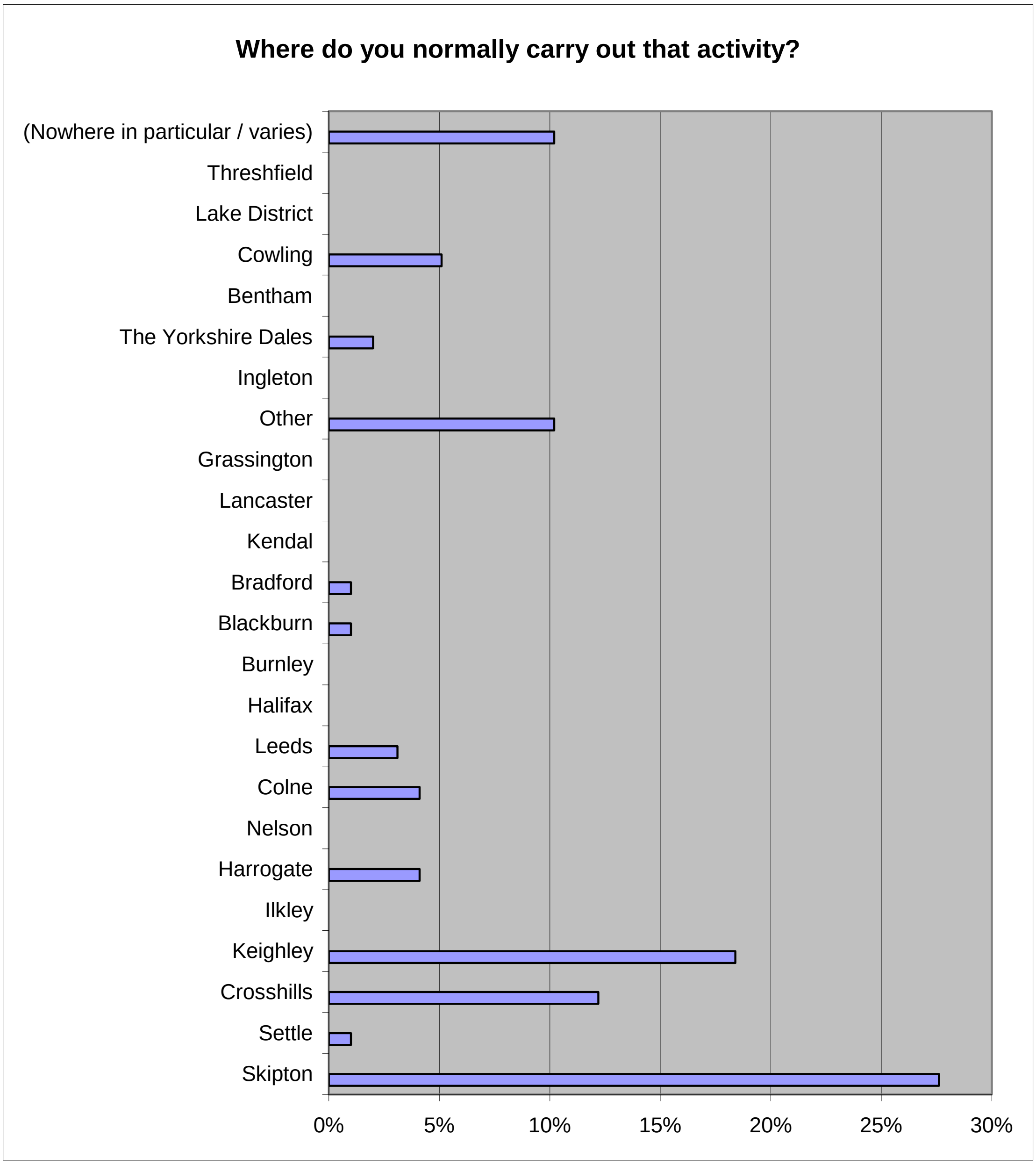
**Question 33 - Where do you normally buy other non-food items ?**



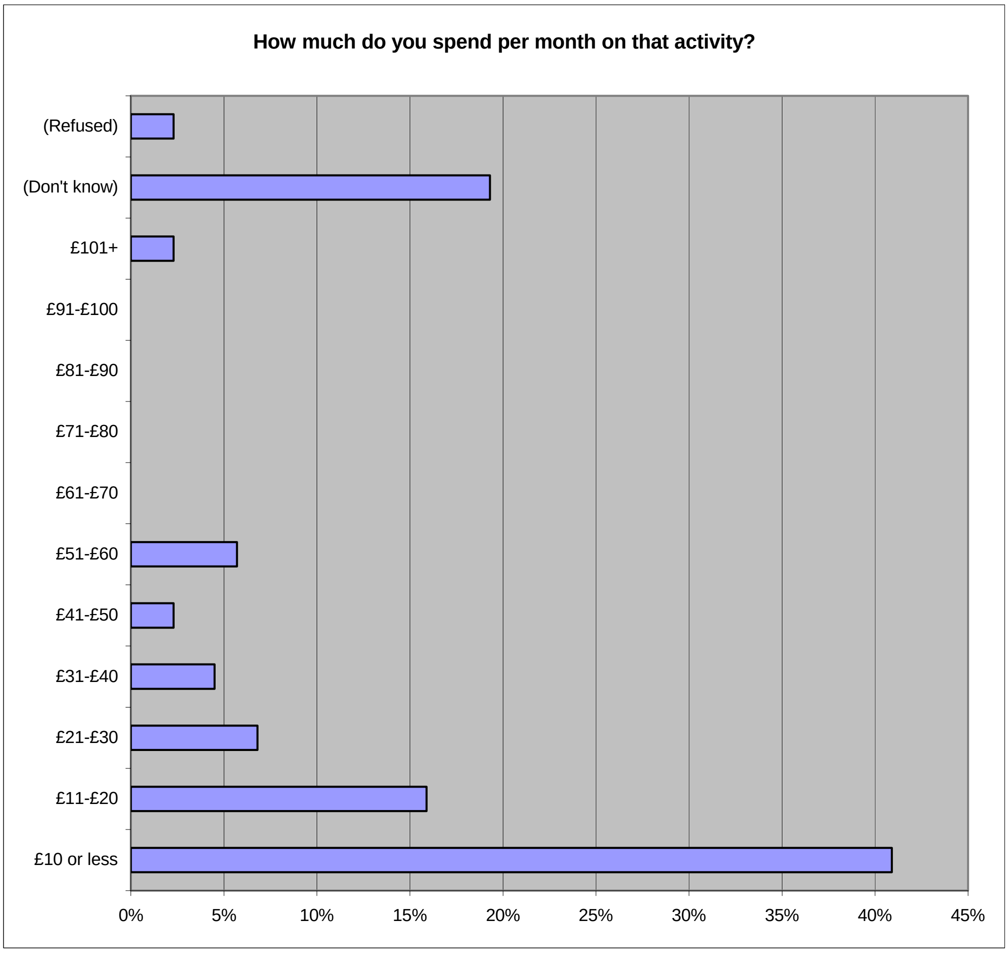
**Question 34 - What is your main leisure activity outside the home?**



**Question 35 - Where do you normally carry out that activity?**



**Question 36 - About how much do you spend per month on that activity ?**



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