Figure 6.30 Wordle Analysis of Trip Advisor Forum

Source: Trip Advisor Forum; 'What to do for a weekend in Harrogate?'

6.155 As can be seen from Figure 6.30, 'Betty's', 'gardens' and 'food' are all key words in discussions of Harrogate, accompanied with positive adjectives such as 'amazing', 'excellent', 'beautiful', and 'lovely'. Similar key words were identified by a Laterooms blog article, a Wordle analysis of which is shown in Figure 6.31 below.

Figure 6.31 Wordle Analysis of Laterooms Blog

Source: Laterooms Blog 'Happy Harrogate: 5 Reasons to Visit Britain's Happiest Town'

6.156 In terms of printed media we have analysed below the contents of an article about Harrogate that appeared recently in the Daily Telegraph (Figure 6.32) and also the contents of the Visit Harrogate Brochure (Figure 6.33). The newspaper article featured key words such as 'Turkish Baths', 'Betty's', 'shops' and 'Victorian-era' with prominent adjectives including 'relax', 'wonderful' and 'nice'. The Visit Harrogate brochure highlighted the words 'galleries', 'food' and 'quarter', in addition to the common references found in other sources to Betty's, the Turkish Baths and gardens.

Figure 6.32 Wordle Analysis of Daily Telegraph Article

Source: • Daily Telegraph, 'Val McDermid's Harrogate: My Kind of Town'

Figure 6.33 Wordle Analysis of Visit Harrogate Brochure

Source: Visit Harrogate Brochure (Retail and Attractions)

6.157 The Wordles give a good flavour of perceptions by bloggers and forum contributors relative to official guides. Whilst there is often a fair degree of commonality in terms of adjectives, certain key products appear less often across the board. Conference and theatre is absent completely, whilst spa and shopping appear far less often than could normally be expected. There also appears to be a low awareness of the Montpellier Quarter, suggesting on-going challenges to be overcome in terms of place-making and overall perceptions of the area as a destination.

Summary Harrogate Marketing Mix

6.158 A destination needs to consider the marketing mix in order to meet its consumers' needs effectively. The marketing mix, often referred to as the 'four Ps', comprises a consideration of:

- product
- price
- place
- promotion

6.159 Broad definitions are presented below.

Figure 6.34 Components of the Marketing Mix

6.160 No one element of the marketing mix is more important than another – each element ideally supports the others. Destinations modify each element in the marketing mix to establish an overall **brand image** and USP, or unique selling point that makes their products stand out from the competition.

6.161 Taking the five Mosaic population groupings highlighted earlier as being key to Harrogate, a four Ps summary analysis for Harrogate is presented below.

Table 6.15 Harrogate Marketing Mix Analysis

	Product	Price	Place	Promotion
Suburban Mindsets ***"predominantly middle class or skilled working class"***	Most likely to purchase mainstream brands. Key Harrogate brands; Wetherspoon, Carluccios, Jamie's Italian	Much of this group's personal wealth is tied up in their property. Financially stable, emphasis on value for money.	Most likely to shop at nationally known retail chains.	Responsive to advertising that illustrates value for money as well as endorsements from satisfied users. More likely to respond to advertisements in regional newspapers, to direct marketing, telephone marketing and door-to-door selling.
Professional Rewards ***"UK's professional and managerial class"***	Tastes are generally conservative, with preferences for good taste over ostentation. Key Harrogate brands; Betty's, Carluccios, Zizzi, Van Zellers, Orchid, Costa, Jamie's Italian, Turkish Baths, Harrogate Theatre	They seek value for money rather than the lowest prices and will pay a premium for brands renowned for quality and reliability.	Tend to shop at retail stores where service is a key component of the overall proposition.	Blogs, broadsheets and personal recommendations key.
Industrial Heritage ***"traditional and conservative"***	Loyal to trusted, popular products and brands. Key Harrogate brands; Betty's, Wetherspoons, traditional pubs	This group frequently buy on price rather than range or value.	This grouping frequents new out-of-town retail parks developed on former brown field sites and shop as much in large national retail chains as in small independents.	Industrial Heritage consumers prefer traditional sales approaches and promotions that emphasise value for money. They are responsive to door-to-door distribution and addressed mail, and are frequent readers of mid-market tabloid newspapers.
Alpha Territory ***"the most wealthy and influential individuals in the UK"***	Luxury items such as expensive brands of jewellery, cars, kitchens and furniture. Key Harrogate brands; Betty's, Van Zellers, the Orchid, iStore, Turkish Baths, Royal Hall	Quality and service have primacy over value for money.	Boutique, exclusive venues with the 'right' brands.	This group can be reached through media such as the financial press, leading business publications and through sponsorship of major sporting events to which many may be invited by friends and business partners.
Active Retirement ***"aged over 65, whose children have grown up"***	Key Harrogate brands; Betty's, Carluccios, Costa.	Mixed impact, may not be the main factor for all. Some will be struggling financially, some are likely to have an occupational pension accompanied by savings.	Neighbourhood shopping centres which often contain outlets which meet the demands for specialist foods and drink, hair salons, estate agents and legal services.	Traditional methods (see industrial heritage) predominate, with often low ability amongst this grouping with the internet.

Summary Comment - Town Centre Marketing

6.162 Analysis of the context, target markets and perceptions of Harrogate suggests the following points of relevance to the development of the HTCSM:

- There is currently a strategic vacuum in terms of marketing (and to a degree, product development). With the LEP yet to issue a tourism strategy, work yet to begin on a complete Destination Plan by Visit Harrogate, limited available research and no Town Centre Manager in place, it is important that steps are taken to bridge these gaps as soon as possible.
- Research suggests that word of mouth and personal recommendations appear critical to the vast majority of visitors to Harrogate, often at the expense of traditional methods such as brochures and the internet. This is slightly contradicted by the results of the Mosaic study, however, which suggests strong faith amongst key user groups for more traditional forms of advertising (e.g. newspaper based). The link between these two trends may be the presence of opinion infused pieces which predominate in traditional print media and, indeed blogs.
- Harrogate enjoys a healthy degree of relatively high spend, higher status users within its overall base of customers – including four times the average of the highest spenders in the UK, 'Alpha Territory'. Matching the experience, tailoring promotions and meeting expectations of these key groups with some commonalities will be critical to ensuring the on-going success of the masterplan. Where necessary, active consideration should be given to products likely to sustain the presence of higher spend customer groups (e.g. Alpha Territory, Professional Rewards) such as accommodation, independent quality retail and food and beverage, experiences such as spas and unique events, all of which will in turn help drive Harrogate's distinctiveness agenda.
- The Wordles provide a useful illustration of the gap between perceptions of policy makers and consumers. Betty's and the Turkish Baths are amongst the most cited individual facilities in the research, whereas other brands, notably the Montpellier Quarter fare less well. Thematically, conference, spa, festivals and events all appear under the radar in the perceptions of bloggers and consumers.

Summary and Conclusions

6.163 Analysis of the Harrogate tourism and leisure product suggests the following in terms of assets, opportunities and constraints:

Assets

- A solid core of loyal customers with a strong affection for the traditional, well-kept Harrogate townscape.
- A good stock of hotel beds, albeit with some deficiencies in branded budget and modern 3 /4 star provision relative to regional competitors.
- The Spa heritage is an undoubted asset, contributing towards Harrogate's distinctive identity despite being largely underplayed at present.

- The town centre is a regional giant in terms of conferences and exhibitions, able to compete with city-based destinations on the basis of a compact, ornate and high quality offer. This and the HIC as a whole is undoubtedly the strongest card in the deck for Harrogate's tourism offer and provides a gateway for further exploration of the town and wider district by delegates.
- There is a strong, established and innovative events programme and organisational infrastructure that is well executed, established and growing.
- The town centre has well established theatre and performance facilities in the Theatre and Royal Hall, although outside of these facilities the picture is somewhat patchy.
- There is an exciting mix of operators, predominantly independent, promoting a strong sense of distinctiveness.
- Betty's Tea Room – a genuinely world renowned institution.
- The Montpellier Quarter – a unique, characterful space with potential to become a well-known destination in the same way the Northern Quarter and Ropewalks have for Manchester and Liverpool, if handled sensitively.
- Valley Gardens and Crescent Gardens – two spaces with the potential for year round events space, if sufficient infrastructure is put in place.

Opportunities

- Revisit the HIC masterplan and revise proposals. Suggest King Street improvements, a link to the Majestic, pedestrian friendly measures, reconfiguration of lesser used halls to provide smaller, more flexible provision and enhanced linkages to Crescent Gardens are all worth active consideration. The support of this facility should be the number one priority for leisure and tourism in the masterplan
- Diversification of the hotel stock and additional bed spaces. The Council offices at Crescent Gardens and, potentially, the car park behind the Royal Baths may merit further consideration for a modern spa hotel, potentially of 5 star quality – both of which are absent from the current mix in Harrogate.
- King Street and Oxford Street – two south facing areas with potential for events and food and beverage uses, if developed sensitively.
- New visitor attraction with a family focus (potentially in Hall Q at the HIC), supported by a virtual town trail and upgrade of existing facilities (e.g. refurbish Royal Pump Rooms with popular IP theming, consider the potential to add accommodation to the Turkish Baths)
- Explore the potential to seed performance and cultural activity outside of the Theatre and Royal Hall, with a particular focus on the Montpellier Quarter initially.
- Upgrade Crescent Gardens and the lower area of the Stray to make staging events easier and better for customers.
- A new modern, high quality spa (potentially as part of new hotel or within Hall Q of the HIC) and a greater presence for treatments and health throughout the town centre.

- Additional forms of commercial leisure, notably casino, additional cinema screens and more urban forms of bowling (see All Star Lanes) which add a non-alcohol dependent aspect to the evening economy. In addition, consider the potential for newer, contemporary beer led concepts (e.g. Brewdog, new brewpub).
- Increase the amount of al-fresco eating and drinking areas throughout the town centre, particularly in areas with a southerly aspect. This could also extend to temporary beer gardens (ideally as part of, or in close proximity to key cultural facilities like the spiegeltent).

Constraints

- Available sites – there are very few available sites which afford potential for game changing interventions, such as a modern hotel of scale.
- Statutes limiting use of open space, particularly The Stray.
- Low levels of unit vacancy, which although not an issue in many ways, does limit the potential to diversify the offer and bring life to retail areas such as James Street after hours.
- Traffic flows and congestion, which together with the rail line can constrict customer flows in and around the town centre and reduce legibility.
- The predominance of small-scale retail sites with limited alternative uses.

7 LOCAL PROPERTY MARKET REVIEW

Introduction

7.1 In order to understand the level and nature of demand for land and property within Harrogate Town Centre we have undertaken a comprehensive review of transactional data for the most important land uses within the town centre – retail, leisure and offices. To analyse trends we have taken an extended data sample of 10 years, focussed solely on the town centre study area defined by the Borough Council. The sample covers the period from January 2004 to May 2014 and contains some 226 transactions, including both lettings and freehold sales.

7.2 The data has been analysed in four separate ways (focussing solely on lettings):

- the number of lettings and the total amount of floorspace let year-on-year;
- the average size of unit taken in each year;
- the rent levels achieved; and
- the yields achieved.

7.3 We have also obtained a list of the latest property requirements currently being sought by potential occupiers.

7.4 Our research and analysis has given us a comprehensive understanding of the characteristics of property that has been taken up in recent years, to allow conclusions to be drawn in respect of the scale and nature of likely demand for town centre uses in Harrogate. In addition, it also allows us to understand the values that different types of town centre development will generate, informing the assumptions to be applied at a later stage in the HTSCM when assessing the viability of proposed masterplan projects.

Retail and Other High Street Uses

Take Up and Unit Sizes

7.5 Table 7.1 below provides an analysis of the number of transactions relating to typical High Street uses (A1 to A3) that took place over the ten year assessment period.

Table 7.1 Analysis of High Street Transactions

Year		Take Up						
		0 - 100 sq. m.	101 - 200 sq. m.	201 - 300 sq. m.	301 - 400 sq. m.	401 - 500 sq. m.	501+ sq. m.	**Annual**
2004	No. Transactions	2	0	2	0	1	0	**5**
	Floorspace (sq. m)	177	0	434	0	425	0	**1036**
2005	No. Transactions	2	3	2	0	1	0	**8**
	Floorspace (sq. m)	69	485	456	0	407	0	**1417**
2006	No. Transactions	0	1	0	1	0	0	**2**
	Floorspace (sq. m)	0	195	0	334	0	0	**529**
2007	No. Transactions	1	4	1	0	0	1	**7**
	Floorspace (sq. m)	33	530	226	0	0	1139	**1928**
2008	No. Transactions	6	5	1	0	0	1	**13**
	Floorspace (sq. m)	368	637	279	0	0	1394	**2678**
2009	No. Transactions	16	9	3	1	0	2	**31**
	Floorspace (sq. m)	872	1417	775	377	0	1572	**5013**
2010	No. Transactions	11	12	5	1	0	3	**32**
	Floorspace (sq. m)	695	1835	1116	331	0	2307	**6284**
2011	No. Transactions	12	4	1	0	2	3	**22**
	Floorspace (sq. m)	709	596	255	0	863	3085	**5508**
2012	No. Transactions	15	7	0	1	0	1	**24**
	Floorspace (sq. m)	1033	1044	0	371	0	564	**3012**
2013	No. Transactions	9	7	3	2	1	2	**24**
	Floorspace (sq. m)	516	1106	806	742	413	1617	**5200**
2014 YTD	No. Transactions	5	0	1	0	0	0	**6**
	Floorspace (sq. m)	295	0	248	0	0	0	**543**
Complete	**No. Transactions**	**79**	**52**	**19**	**6**	**5**	**13**	**174**
	Floorspace (sq. m)	**4767**	**7845**	**4595**	**2155**	**2108**	**11678**	**33148**

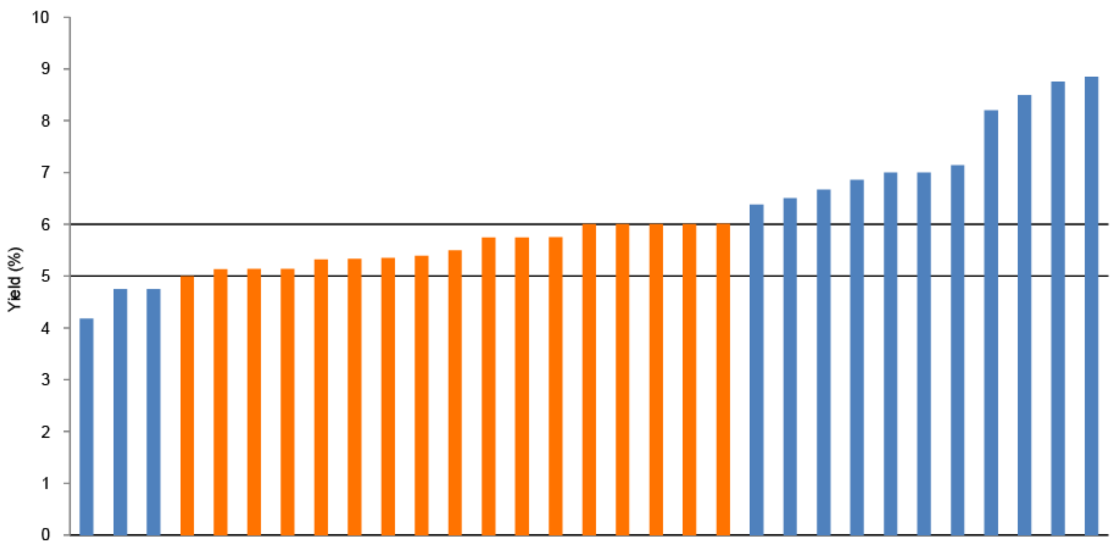
7.6 There are two key pieces of information that can be taken from this initial analysis. Firstly, the data shows that the last five years has seen much higher levels of activity compared to the previous five years. There are numerous factors that may have led to this, including the departure of retailers from the town centre (due to the recession and the failure of national retail operators), leading to significant floorspace becoming available and therefore much greater ‘churn’. It also suggests there was an amount of pent up demand ready to take up space as it became available, even through the recession. That said, one characteristic of retailing through the recession was short-term, opportunist retail tenancies so this may account for some of the increase in take up.

7.7 The second field of information in these data are trends relating to the size of unit that is generally taken up in the town centre. Units tend to be either at the smaller end of the scale (up to 200 sq. m.) or larger at over 500 sq. m. There are very few transactions for units in the mid-range of between 200 to 500 sq. m. This gives an indication of the unit sizes that are likely to be required in the future, but also reflects the characteristics of the existing property stock within the town centre. The historic nature of much of this property restricts the space that is available, and the ability to redesign and reconfigure that space.

Yields

7.8 Of the transactions recorded in Table 7.1, some 31 provided details of prevailing yields[5]. These transactions showed a broad range in yields over the assessment period, from 4.18 per cent to 8.85 per cent (as summarised in Figure 7.1). However, it should be noted that the data covers a number of sub-sectors of High Street uses as well as different types of operator, which can both have a bearing on yield. This is because yields are largely driven by the perceived strength of the covenant of the tenant(s), so yields will be higher where tenant(s) are smaller independent traders in sectors that are unproven or higher risk, than they would be if tenants are large multiples in established sectors.

Figure 7.1 Yield Analysis for High Street Uses



Yield Values reported in Harrogate Town Centre

7.9 More than half of the yield data is primarily focussed (51 per cent of the data) within the range of 5 per cent and 6 per cent, which is relatively low (i.e. good) and reflects the fact that Harrogate is seen as a strong, general low-risk retail destination.

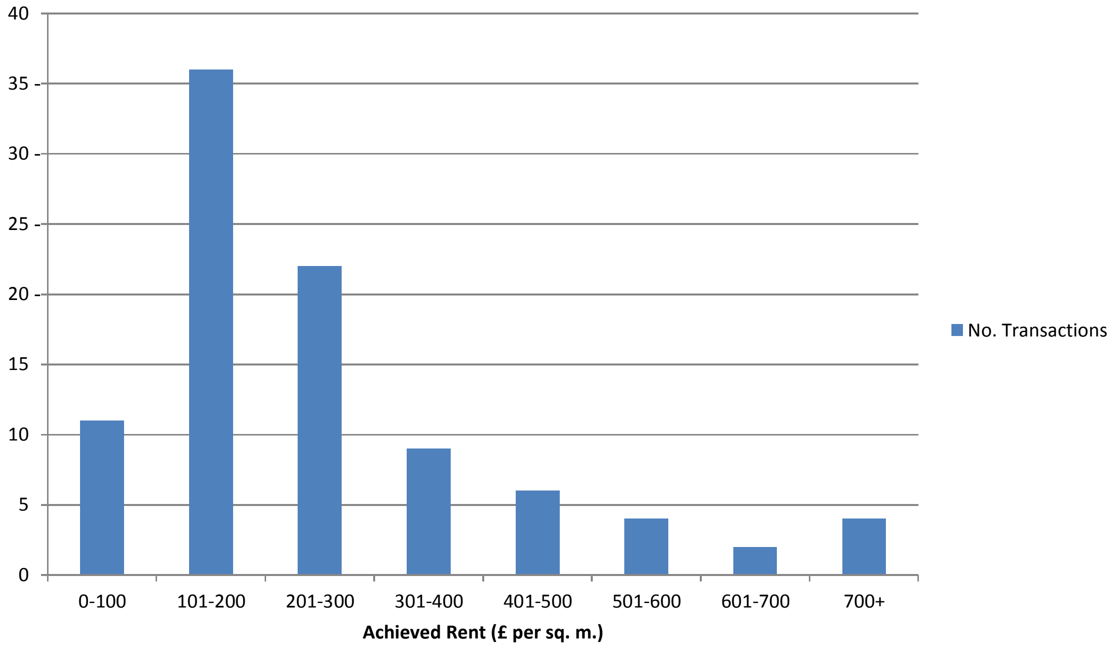
7.10 In addition to the above, we have supplemented this local data with analysis from the CBRE Prime Rent and Yield Monitor (Q2 2014). This suggests prime yields in Yorkshire of 5.5 per cent to 6.5 per cent and re-enforces the finding that Harrogate is a strongly performing centre.

[5] A rental yield is an important measure of the future income from an investment. Yields are calculated as a percentage, based on the property's cost, the annual income and the running costs. The yield value is also affected by property demand. Where a development type is in high demand the yield values tend to be lower and conversely when there is a low demand the yield goes up as the chances of a space being vacant increase.

Rental Values

7.11 In addition to yields, rental values are the other critical factor in determining the value of development. Figure 7.2 below provides an analysis of recent transactional data showing the distribution of overall levels of achieved rents in bands from less than £100 per sq. m to over £700 per sq.m.

Figure 7.2 Retail Rent Analysis



7.12 The chart shows that by far the greatest volume of transactions is in the £100-£200 per sq. m band and, to a lesser extent, the £200-£300 per sq. m band. There are examples where lower rents as well as much higher rents are achieved. As might be expected, lower rents are often found in more secondary locations as well as for larger units where values on a per sq. m basis tend to be lower. Conversely, the highest rents are mostly for very small units.

7.13 It is reasonable to assume that any new retail development will attract rental values at the upper end of the range of what is typical, given that brand new space will be of a quality and configuration that best meets tenant demands and aspirations.

Office

Take Up and Unit Size

7.14 Table 7.2 below provides an analysis of the office property transactions over the last ten years, showing the number of transactions and total floorspace transacted each year across various size bands. The data on office transactions shows a much more consistent picture than is the case for High Street floorspace. The number of transactions and the amount of floorspace transacted has remained relatively stable, albeit relatively small in scale, over the assessment period.

7.15 Similarly, whilst there is some polarisation in the size of office spaces typically sought – with the greatest demand for units of less than 200 sq. m and over 500 sq. m – the overall picture is one of demand across unit sizes.

Table 7.2 Analysis of Office Transactions

Year		Take Up						
		0 - 100 sq. m.	101 - 200 sq. m.	201 - 300 sq. m.	301 - 400 sq. m.	401 - 500 sq. m.	501+ sq. m.	Annual
2004	No. Transactions	2	1	0	0	0	1	4
	Floorspace (sq. m)	140	177	0	0	0	2239	2556
2005	No. Transactions	0	0	2	0	0	2	4
	Floorspace (sq. m)	0	0	498	0	0	1057	1555
2006	No. Transactions	10	4	2	0	1	1	18
	Floorspace (sq. m)	537	543	540	0	483	508	2611
2007	No. Transactions	4	1	2	1	0	0	8
	Floorspace (sq. m)	152	133	501	342	0	0	1128
2008	No. Transactions	5	3	1	1	1	1	12
	Floorspace (sq. m)	297	356	260	351	494	650	2408
2009	No. Transactions	6	3	1	1	1	2	14
	Floorspace (sq. m)	281	365	224	314	401	1035	2620
2010	No. Transactions	10	2	0	0	0	1	13
	Floorspace (sq. m)	510	227	0	0	0	520	1257
2011	No. Transactions	12	4	0	0	0	0	16
	Floorspace (sq. m)	817	599	0	0	0	0	1416
2012	No. Transactions	9	1	1	0	0	0	11
	Floorspace (sq. m)	480	127	212	0	0	0	819
2013	No. Transactions	15	4	2	0	0	0	21
	Floorspace (sq. m)	700	520	516	0	0	0	1736
2014	No. Transactions	3	1	0	0	1	0	5
	Floorspace (sq. m)	211	124	0	0	459	0	794
Complete	**No. Transactions**	**76**	**24**	**11**	**3**	**4**	**8**	126
	Floorspace (sq. m)	**4125**	**3171**	**2751**	**1007**	**1837**	**6009**	18900

Yields

7.16 Very limited data on yields in the office sector was available through the analysis of recent office transactions in Harrogate, which alone does not provide adequate evidence on which to base an assumption to be used in any future assessments of viability. As such, our assumptions have primarily been informed by the information included in the CBRE Prime Rent and Yield Monitor (Q2 2014) as well as more anecdotal evidence from consultations with agents active in the local market.

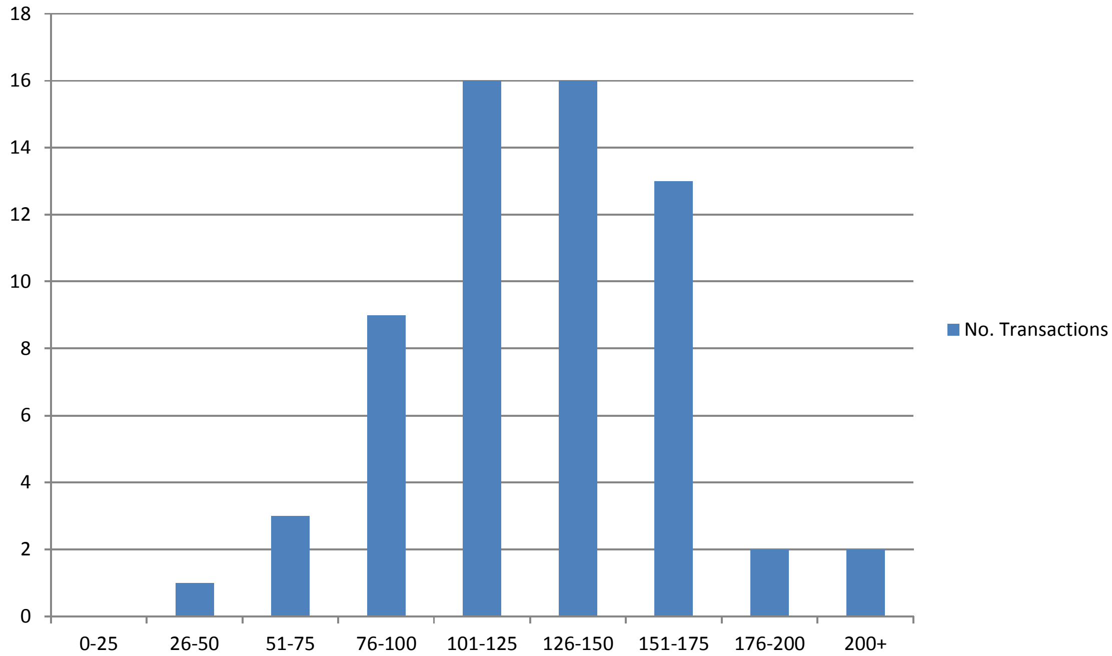
7.17 For the Yorkshire and Humber region, the CBRE Prime Rent and Yield monitor suggests office yields of approximately 8.1 per cent. However, the prime office market in the region is not Harroage and this data is more likely to reflect the characteristics of Central Leeds, Sheffield and York. Harrogate is not as strong an office market location and, as such, yields are likely to be somewhat higher than those achieved by the aforementioned regional comparators.

7.18 Making allowances for the slightly off-prime nature of Harrogate's office market, and taking account of the findings of consulations with agents, it is our view that yields for speculative office development in Harrogate Town Centre are likely to be in the region of 9 per cent.

Rental Values

7.19 Figure 7.3 below provides an analysis of recent transactions for office space and the rental values achieved. It shows the number of transactions at each band of rental value.

Figure 7.3 Office Rent Analysis



7.20 Figure 7.3 shows that the distribution of rental values is relatively broad. The greatest concentration of transactions is at values between £100 per sq. m and £175 per sq. m. As with retail space, it is reasonable to assume that rental values in brand new office space will be at the upper end of the typical values being achieved as the quality of the space is likely to be more attractive to tenants. As such, rents of c. £160-£170 per sq. m are likely to be achievable.

Other Commercial

7.21 We have also reviewed the data available for other commercial uses that could be developed as part of the HTCSM. This covers items such as hotels, cinemas, care homes, nightclubs and leisure centre type facilities.

7.22 Harrogate is an established destination with a range of hotels to cater for all types of visitor – from tourists to business users utilising the conference facilities. It is therefore expected that some hotel transactions would take place. The data gathered showed a limited amount of information however it was possible to identify hotel yields in the region of 7 per cent. Additional analysis of hotel developments has shown that mid-range hotels would be able to achieve values in the region of £45,000 to £65,000 per room, based on a development of approximately 80 rooms.

7.23 The data available for other uses was more limited, as might be expected for less frequently developed uses such as cinemas and nightclubs. The value data shown in the transactional data shows cinema development as achieving a rent of approximately £15 per sq. m at a yield of 5 per cent. This relates to a 2,500 sq. m cinema development in Harrogate Town Centre. The absence of recent transactions for these uses should not be taken as indicative of limited demand, as is demonstrated by the forthcoming proposals for cinema development on the site of the former Beale's department store.

Harrogate Business Survey

7.24 The findings of the business survey are fully summarised in Section 4 of this report. However, the key findings of relevance to the local property market relate to satisfaction with existing premises and intentions to relocate. In this respect, the survey found that the vast majority of businesses based in the town centre - which are overwhelmingly small, well established businesses - are satisfied with their existing accommodation and few are seeking to relocate in the short term. The main reasons for this were found to be satisfaction with the location, size and layout of existing premises

7.25 These findings correlate well with the relatively small scale demand for offices shown in the take up data, summarised above at Table 7.2. This provides further indication that new office development may not be viable, as a function of relatively limited demand.

7.26 The main priorities of local businesses for improvement of the town centre, as identified through the survey, are for reductions in traffic and congestion, and improvements to town centre car parking.

Property Requirements

7.27 Published property requirements for Harrogate come from a range of retail and leisure operators. Of requirements published in 2014, the largest are as follows:

- The Chinese Buffet (up to 10,000 sq. ft);
- Al Murad Tiles (up to 10,000 sq. ft);
- Frankie and Benny's (up to 8,000 sq. ft);
- Coast to Coast (up to 8,000 sq. ft);
- Chiquito (up to 8,000 sq. ft); and
- Multiyork (up to 7,500 sq. ft).

7.28 It is interesting to note that many of the largest floorspace requirements are from Class A3 operators. We also note outstanding requirements for high quality retailers such as Jo Malone, Chesca, Moshula and Neal's Yard.

7.29 We are not aware of any specific requirements for offices from commercial or public sector organisations. As illustrated by the analysis of office transactions demand is stable but low and the results of the business survey show that few businesses are looking to relocate in the short term.

7.30 However, we are aware that the Borough Council has current proposals to consolidate its functions within the town centre to a single site at Knapping Mount.

Offices at Crescent Gardens have already been put on the market and it is expected that office accommodation at Scottsdale House and Springfield House will be released in due course. These developments will provide new investment opportunities and good substantial increase the amount of office accommodation available in the town centre.

Summary and Implications

7.31 Based on the analyses above, if additional high street type retail development is to be brought forward as part of the HTCSM, we would recommend a scheme comprising a small number of units of 500-1,000 sq. m and a larger number of units of 100-300 sq. m. Rental values are likely to be in the region of £250-£300 per sq. m, with yields of c.6 per cent.

7.32 Given the relative diversity in the scale of office spaces being sought in Harrogate, if office floorspace is to be included within the HTCSM, our analysis suggests that a diverse range of unit sizes should be provided. Flexibility and the ability to combine and sub-divide suites will be important factors to successfully capturing demand.

7.33 That said, the overall scale of demand is somewhat limited and Harrogate is not perceived to be a strong office market in a regional context. This is reflected in relatively high yields of around 9 per cent for a speculative office development, and relatively low rental values of £160-£170 per sq. m. Given the usually high cost of land acquisition in town centres, these rental values and yields are unlikely to result in commercially viable speculative office development. This is likely to be exacerbated by the relative strength in Harrogate of competing uses such as retail and residential for which the market is much stronger and for which the values of development would exceed those for office uses.

7.34 A key constraint on any future development within the town centre will be the cost of purchasing the land and site assembly. The fragmented pattern of land ownership that is usually seen in town centres makes site assembly both a difficult and costly process. As such, the viability of development, even for stronger sectors such as retail, may be impacted upon.

8 ENVIRONMENTAL REVIEW

Introduction

8.1 This Environmental Review includes an appraisal of streets, road corridors, buildings, public realm and other spaces within Harrogate Town Centre. As has been noted in earlier sections of this report, the physical environment of the town centre is a significant part of Harrogate's appeal, both for residents and visitors. This appraisal will help to identify priorities for improvement that will then go on to form the basis for proposed HTCSM projects. A key objective of these projects will be to preserve and enhance the physical environment of the town centre in order to deliver economic and social benefits.

Overview of the Town Centre

8.2 Harrogate is a spa town which, historically, grew out of two small existing settlements. The town centre consists of a rich mix of 18th and 19th century Georgian and Victorian buildings, predominantly 2 to 3 storey in height (though there are a number of much taller and notable historic buildings). The dominant building material is sandstone. The establishment of The Stray in 1778, to link most of Harrogate's springs in one protected area, determined the pattern of the town's future development and defined the shape of the town centre restricting its development to the south and southwest. The Stray extends to and area of 200 acres (81 ha) and provides the town centre with a distinctive and unique setting. To the west of the town centre, on the edges of the study area is the attractive Valley Gardens, the town's main formal park on the site originally known as 'Bogs Field'.

8.3 Following the inter-war period the role of Harrogate as a spa destination began to decline. However, the town centre has managed to retain its unique historic grain and structure, despite the introduction of larger retail and commercial developments in the 20th century. The large international conference centre, hotels and high quality shopping centre have been successfully integrated and have largely contributed to the character of the town centre, supporting Harrogate's ongoing role as a tourist destination.

8.4 The compact town centre core provides an impressive mix of uses and attractions. Central to the town's attraction is its urban fabric, the historic and attractive buildings, the streetscape, public realm, and open spaces, which combined provide a character and ambience, that is unique to Harrogate. This is very clearly demonstrated by the visitor survey results that are summarised in Section 4 of this report. The existing building stock is well maintained, benefiting from good levels of investment, and there are hardly any vacant sites within the town centre. One dramatic and unique aspect of the town are the open spaces which surround the town centre and extend into its heart. The skyline is also important, due to the topography of the area, landmark buildings and mature trees, which create an attractive and memorable silhouette.

8.5 These physical attributes are protected to a degree by the conservation area which covers the study area, but constant maintenance, careful, proactive planning control and management of change are essential to ensure the town centre not only continues to prosper, but grasps every opportunity to protect what is best, while enhancing the environment and managing change for the benefit of those who live, work in and visit the town centre.

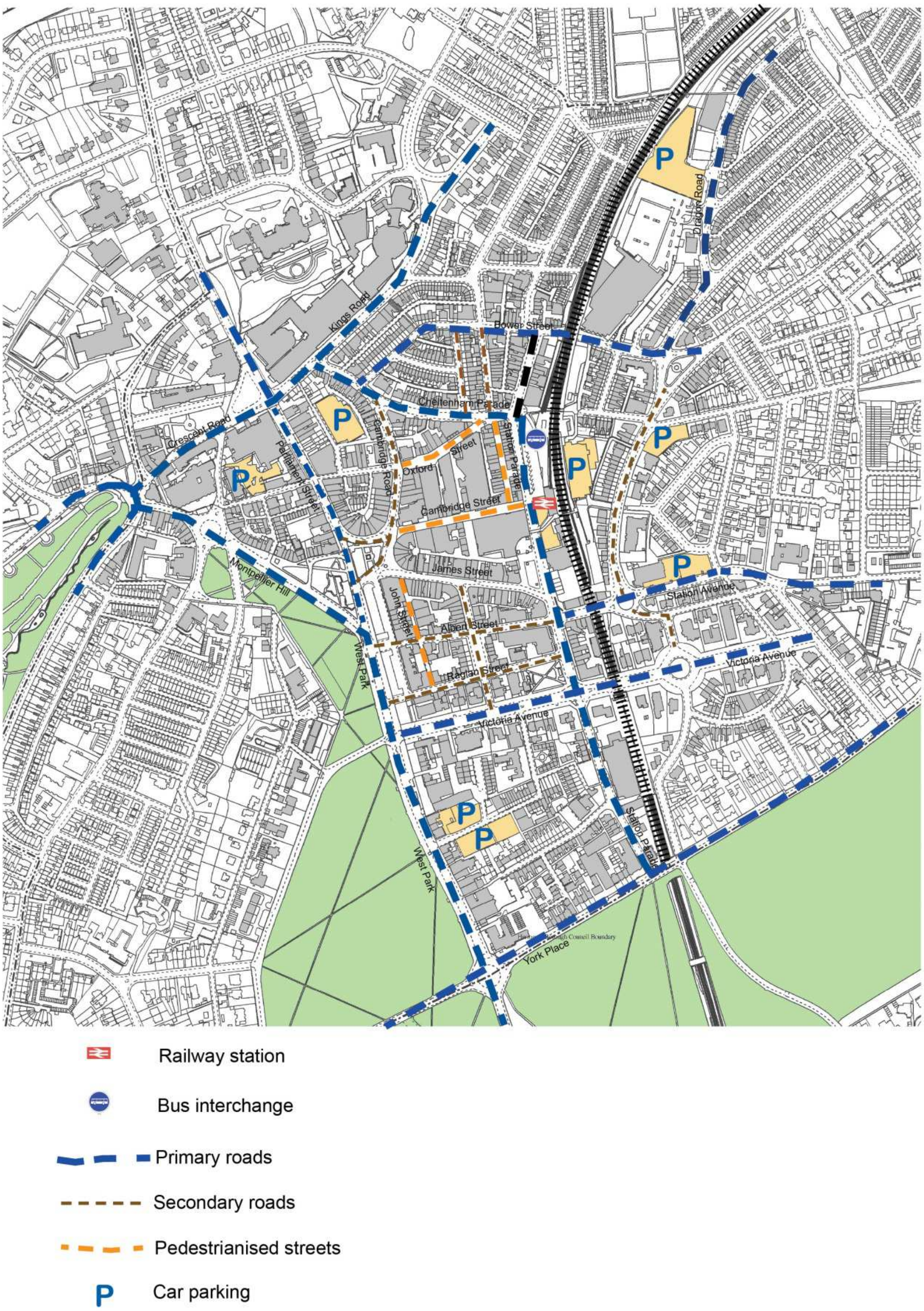
Key Diagrams

8.6 In the following diagrams we map key aspects of the town centre environment, including transport infrastructure and main routes, key destinations and important open spaces, and significant buildings and important viewpoints.

8.7 Figure 8.1 below shows main pedestrian and vehicular routes, car parking and main transport facilities within the town centre. This shows the pedestrianised core of the town centre, focused on Cambridge Street surrounded by a small network of secondary roads and primary routes. Primary routes run north to south along Parliament Street/West Park and Station Parade, and run east to west along Victoria Avenue, Cheltenham Parade and Bower Street. Primary access routes to the town centre are via the A61 which runs through the town centre and from the southwest where the A59 and A661 converge adjacent to The Stray. More local access routes are provided via Kings Road, Dragon Road and Station Avenue.

8.8 Figure 8.1 also shows that the railway and bus stations are co-located on the eastern side of the town centre and immediately adjacent to the main shopping area. Car parking facilities are dispersed throughout the town centre. There is a particular concentration to the east of the railway line, including the Victoria multi-storey car park. The western side of the town centre is served by the Jubilee multi-storey and by surface level car parks within the Montpellier Quarter which is located to the west of Parliament Street. Parking facilities at Dragon Road and Tower Street (including West Park multi-storey) are more peripheral, located further from the central shopping area but still within walking distance.

Figure 8.1 Town Centre Access and Transport Facilities

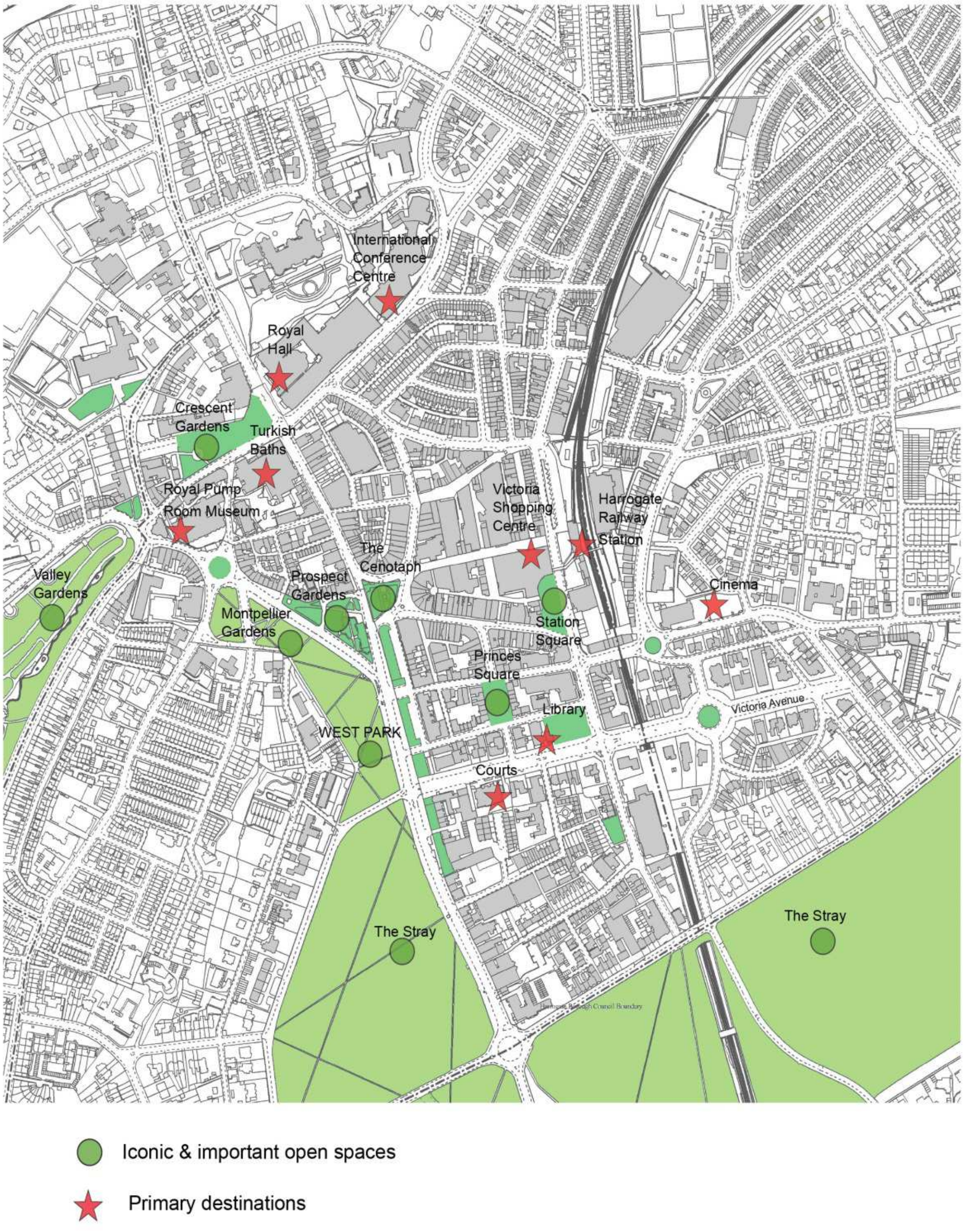


8.9 Figure 8.2 below maps main destinations within the town centre and important open spaces. The distribution of main destinations shows the railway station and Victoria Shopping Centre in the heart of the town centre with key visitor destinations, including the conference centre, museums and hotels towards the north of the town centre. On the southern side of the town centre around Victoria Avenue, there are a number of key public facilities including the library and courts.

8.10 Open spaces, and particularly green spaces, are particularly important to the character of the town centre, as confirmed by the findings of the visitor survey results that are summarised in Section 4 of this report. Figure 8.2 shows the large open spaces of The Stray to the south of the town centre that form an important and distinctive gateway. The Stray is protected by the Harrogate Stray Act (1985) which limits its use. The Stray extends along West Park into the heart of the town centre where more formal gardens are provided at Montpellier Hill and there is space for outdoor events (including the annual Christmas Market). Valley Gardens to the west of the town centre and bordering the Montepellier Quarter provide larger, formal gardens, including a pavilion and tennis courts.

8.11 Other spaces shown on Figure 8.2 include the area around the Cenotaph and Station Square. Both of these are prominent spaces at the centre of pedestrian movements within the town centre. The area around the Cenotaph is the most iconic space within the town centre, located at a confluence of a number of roads, highly visible from the A1 and connecting the main shopping area to the Montpellier Quarter. Station Square is an important gateway to the town centre, is also prominent on the A61 and provides the only formal ‘square’ within the town centre.

Figure 8.2 Main Destinations and Open Spaces

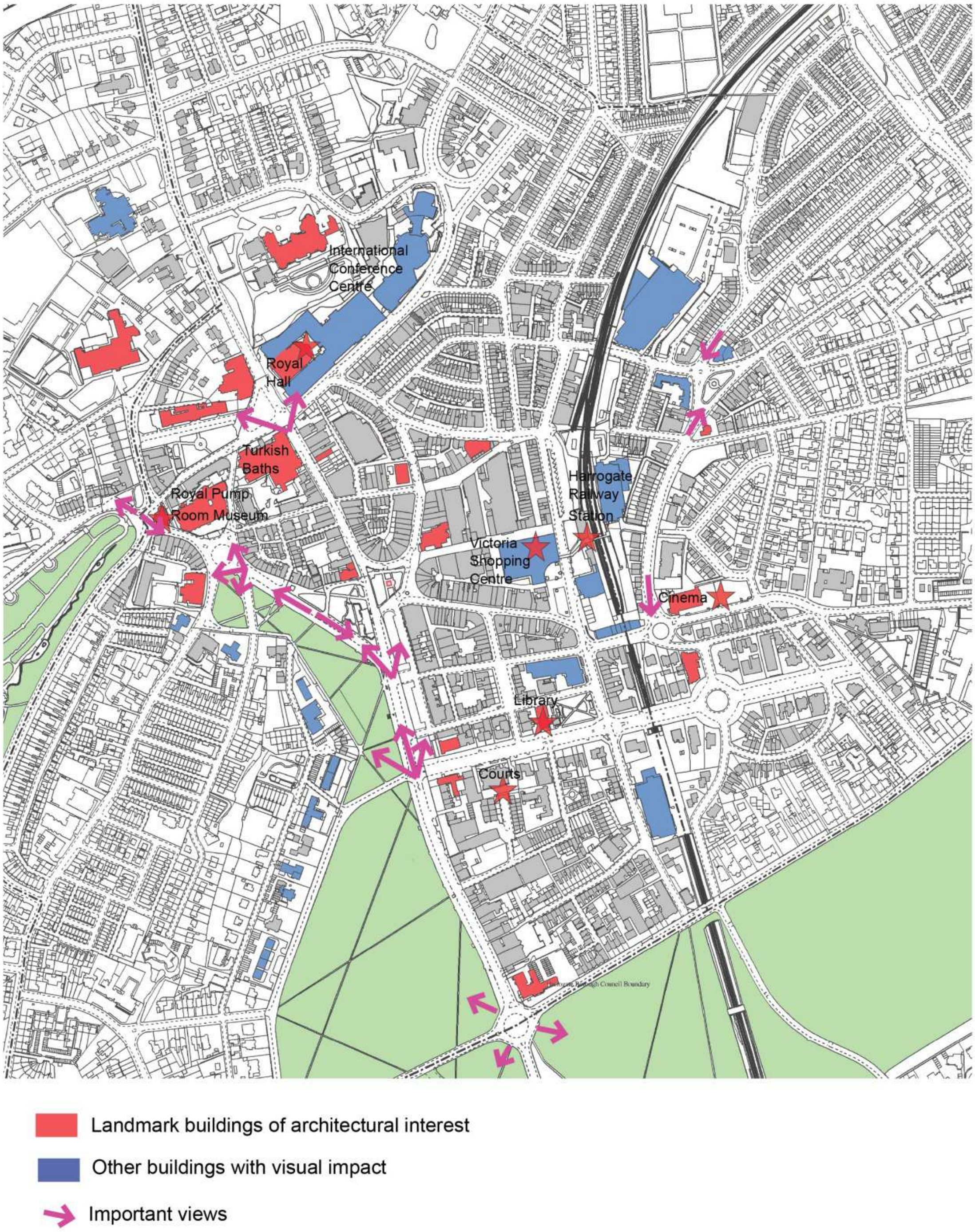


8.12 Figure 8.3 highlights landmark buildings within the town centre and highlights key views. Large landmark buildings are located to the northwest of the town centre and include the Turkish Baths, the Royal Hall, Majestic Hotel and the Royal Pump Room Museum. Smaller notable buildings are dotted around the town centre and include Prince of Wales Mansions on the southern approach to the town centre, Betty's Tearooms overlooking the Cenotaph and the Harrogate Theatre on Oxford Street. Given the topography of the town centre, buildings around the Cenotaph are particularly prominent. The cluster of distinctive buildings around Crescent Gardens also creates an important setting for the conference centre.

8.13 In terms of important views, the most significant are located on the western side of the town centre where the parkland of The Stray provides the town centre with a unique setting. Views north along the busy A61 are particularly important including at the junction with Victoria Avenue and at the junction with Kings Road. Very attractive views are also provided along Montpellier Hill, at The Crown roundabout and the entrance to Valley Gardens. These views are important to the setting of the Montpellier Quarter.

8.14 On the eastern side of the town centre there are a number of key views at important road junctions. This includes approaches to the roundabout at Station Bridge where the art deco Odeon cinema also provides a landmark building, although we note that many of the twentieth century buildings to the south of the railway station detract from views on the eastern side of the town centre and particularly along Station Parade.

Figure 8.3 Landmark Buildings and Key Views



Town Centre Character Areas and Corridors

8.15 In order to examine and evaluate the character and quality of the streetscape and townscape we have identified two types of ‘zones’ within the town centre – ‘character areas’ and ‘corridors’. The study area is sub-divided into five character areas and eight separate corridors, which are shown below in Figure 8.4. The character areas are broader areas, which have a degree of consistency, a unifying character and/or similar issues. The corridors are linear routes, which provide access within the town centre for both for vehicles and pedestrians. The corridors and character areas should not be considered to have precisely defined boundaries as there is a degree of overlap and integration between them.

8.16 In addition to the character areas and corridors we have also highlighted two particularly significant locations, which merit particular attention. These are the transport interchange on Station Parade and the area around the Cenotaph. The transport interchange comprises the railway station, the bus station, office and retail accommodation to the south of the railway station and public realm within the vicinity of Station Square. This area is considered to be significant due to its importance as a gateway location and also the potential for improvement, including the provision of better public transport facilities.

8.17 As noted above, the area around the Cenotaph forms the heart of the town centre. It sits at the junction of a number of key roads within the town centre, is prominent in views from the south and the west, and is surrounded by attractive buildings which typify the character of Harrogate. As such it is a critically important open space, the preservation and enhancement of which should be a key part of any future strategy for the town centre.

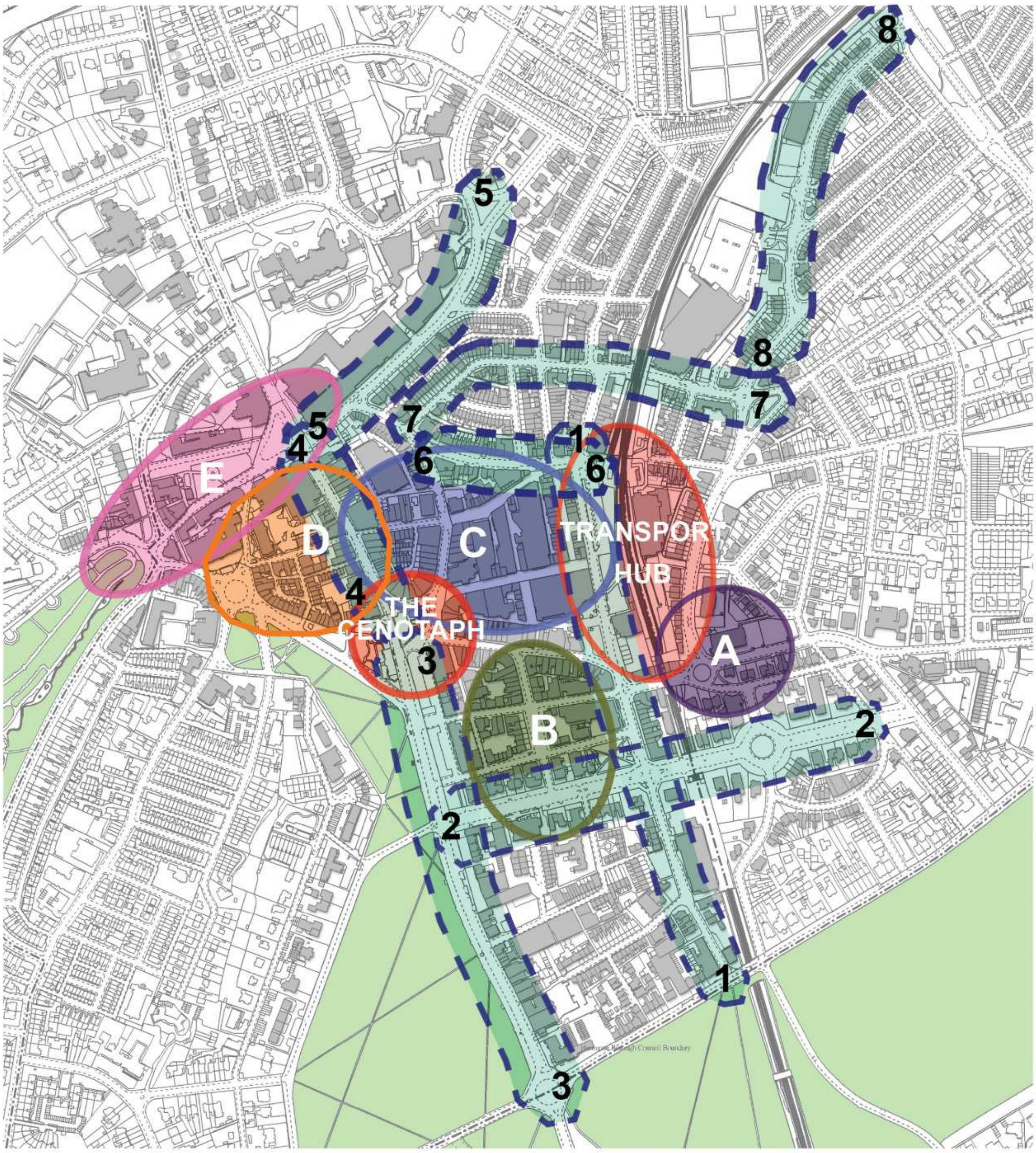
8.18 Volume 2 Appendix G contains our more detailed appraisal of the individual character areas and corridors. However, we summarise below the key points relating to each of the 13 different zones.

Character Areas

Odeon, Station, Avenue and Station Bridge

8.19 This area is a major bridging point linking the east and west of the town across the railway line but it is devoid of real character, with unattractive rear elevations of properties facing onto Station Avenue and an open car parking area behind the Odeon. However, as the location of the iconic Art Deco style Odeon Cinema and as a gateway into the heart of the town, it is an important urban space, with significant potential for improvement the street scene and the public realm.

Figure 8.4 Character Areas and Corridors



The Transport Hub/Interchange

The Cenotaph - Including surrounding buildings & gardens

Character Areas

A - Odeon, Station Avenue & Station Bridge

B - Princes Square

C - Retail Core

D - Montpellier Quarter

E - Crescent Gardens

Road Corridors

1- Station Road

2 - Victoria Avenue

3- West Park

4 - Parliament Street

5 - Kings Road

6 - Cheltenham Parade

7 - Cheltenham Mount & Bower Road

8 - Dragon Road

Princes Square

8.20 This is an attractive, historic square, now unfortunately dominated by parking and corporate advertising in the form a plethora of signage covering the windows and facades of the grand terraces, which enclose the space. The parked cars and signage undermine what could be a distinctive and most attractive space.

8.21 Several of the ground and basement floors have now been converted into restaurant/cafe use, some of which benefit from the use of small garden areas. This has improved amenity and brought life and activity to the space and the street. Princes Square is potentially an important linking space, connecting the premium shopping facilities on James Street to the leisure hubs that have developed on the lively John Street and on Albert Street around the former Beales department store.

Retail Core

8.22 The retail core is the focus for the majority of people visiting Harrogate and consequently the highest footfall is recorded in the area. The area essentially comprises, four east/west orientated streets and two north/south orientated streets, each with a different character.

8.23 Cambridge Street is one of three pedestrianised streets in the town centre and is undoubtedly the main thoroughfare for many pedestrians, a relatively broad street that is home to major high street retailers. It directly links attractions such as The Stray, Montpellier Quarter and Betty's Tea Rooms with the bus station, train station, car parks and taxi ranks. This is the retail/pedestrian spine at the centre of the town.

8.24 Oxford Street is wide and somewhat barren in feel when not full of people. This street has a distinctive feel, largely because to one side the original buildings have all been replaced by buildings of recent construction, large in scale and with mediocre quality facades. The quality of the paving on Oxford Street does not add character to the street and is a possible area for improvement.

8.25 The third pedestrianised street is Beulah Street, located directly across the road from the bus station. It has an attractive entrance with a wrought iron arch on Cheltenham Parade. The general quality / 'feel' of the street are not on a par with others in the retail core, and the shops are generally lower value retailers, with a scattering of budget cafes.

8.26 James Street to the southern edge of the centre is not pedestrianised, but provides one way vehicular access with parking to both sides of the road. The street is home to some fine architecture, essentially unspoilt by modern insertions. The street contains generally higher value, up market retailers. Though the street is architecturally attractive and relatively broad, it feels crowded and there is a definite vehicular/pedestrian conflict, with parked cars crammed along both sides of the road.

Montpellier Quarter

8.27 The Montpellier Quarter is one of the most important parts of the town centre. It is an area of exclusive independent shops, pavement cafes, bars & restaurants, and art/antique galleries. It is separated from the retail core by Parliament Street and from residential and built areas by The Stray and other open spaces. The facades of the buildings to the southern edge of the area provide a most attractive backdrop to The Stray and Prospect Gardens. It is a destination, strategically located at the junction of major open space, parks, heritage assets, pedestrian streets and vehicular routes.

Crescent Gardens

8.28 The Crescent Gardens area accommodates grand buildings of civic importance and landmarks including the Council Offices, Royal Hall, Exhibition Halls, Royal Pump Room Museum, Mercer Art Galleries and Studley Hotel. All these important buildings are located within the manicured setting of Crescent Gardens and the larger Valley Gardens. However, traffic and parking again impact upon the area and the buildings, and this detracts from the pedestrian and visitor experience.

Corridors

Station Parade

8.29 Station Parade runs in a north/south direction through the heart of the town centre and parallel with the railway line. To its northern end the road links into several streets lined with 2-3 storey stone terraces. At the southern end the road 'breaks out' of the built area into York Place with panoramic views out across the expansive Stray. The road provides the main access to the transport hub, which is located at the northern end. However, there is potential to rebalance pedestrian and vehicular movements within the corridor and improve public spaces such as Station Square.

Victoria Avenue

8.30 Victoria Avenue is a broad, formal, tree lined road enclosed by some fine stone buildings. There are a number of architecturally imposing and attractive Victorian villas on the avenue, particularly to the eastern end, several of which have been converted into offices. The mature trees are a particular feature, making a significant contribution to the character of this part of the town centre.

West Park

8.31 West Park one of the main vehicular access routes into the town centre. It provides a dramatic and attractive arrival into the town centre. The road is bounded to the east by the grand facades of imposing stone built terraces and to the west by the Stray. The Stray provides a unique setting and the landscape theme is further enhanced by floral displays to the eastern side of the road. These are particularly prominent to the front of Prospect Place, just before arriving at the Cenotaph.

Parliament Street

8.32 Parliament Street is a relatively short length of road running downhill from West Park and the Cenotaph to the King's Road (A61), where the Conference Centre is located. It is probably best known for 'Betty's Tea Rooms' an attractive corner building at the southern end of the street. Recent refurbishment and new building has taken place to the western side of the road, injecting some modern architectural interpretation and new activity. However, the busy road creates major severance for pedestrians moving from the retail core to the Montpellier Quarter and the historic buildings and parks to the west. The Kings Road junction is also poor and this is a particular problem given that it also serves as the main entrance to the Conference Centre.

Kings Road

8.33 King's Road is dominated by the International Conference Centre and Exhibition Hall, a large building, quite different in scale and architectural character to other buildings in the town centre. It nevertheless sits relatively comfortably within the street scene. This road links into the retail core along Cheltenham Parade, giving access to the restaurant quarter and Harrogate Theatre. At the western end of the road is the junction with Cheltenham Road and Parliament Street, a busy highway junction, but an important space as it links into the attractive Crescent Gardens and is bounded by several of the town's finest stone historic buildings.

Cheltenham Parade

8.34 As well as being a key vehicular route through the town centre, Cheltenham Parade/Crescent provides the main pedestrian link between the Conference Centre, the transport hub and the rest of the town centre. The bottom end of the road has become the focus for restaurant development and the road is lively and attractive, making it generally pleasant for pedestrians. Towards the top end of the road the side/rear elevation of Harrogate Theatre is prominent, but rather bland and imposing. Further east the road turns into Station Parade, also the entrance to the Bus Station; here the confluence of roads, footpaths, vehicles and pedestrians is not ideal, with pedestrians struggling to find an easy route across the road.

Cheltenham Mount and Bower Road

8.35 Cheltenham Mount is predominantly residential with attractive 3 storey bay fronted stone terraces. At the junction with Commercial Street the road becomes Bower Road and passes beneath the railway through an attractive stone arch bridge. Bower Road contains both older terraces and more recent new build properties, in particular a large Asda store. Considering its size the store frontage fits in quite well to the street scene, assisted visually by several mature street trees. The attractive stone bridge provides a gateway for significant footfall into town centre from Asda, the Dragon Road coach/car park and the residential areas to the east, but visually it is now blighted by a large conspicuous advertising hoarding located on the southern side of the road.

Dragon Road

8.36 Dragon Road has been included as it provides access to one of the town centre car parks (Dragon Road Car Park) and this car parking area is also used by coaches and commercial vehicles servicing the Conference Centre. The road is a relatively quiet, broad road with no distinct character, but two distinct sides. One side remains residential, with typical 3 storey stone built terraces. The other side of the road, the western edge, comprises a mix of recent development, including the Asda petrol filling station, the Dragon Road car park, two blocks of commercial units and some relatively modern brick built semi-detached and terraced housing.

Public Realm

8.37 As outlined within our assessment of town centre character areas and corridors, the quality of the public realm throughout the town centre is variable. The parks and green spaces within the town centre are of an excellent quality, particularly Valley Gardens on the edges of the town centre and the well maintained parkland of The Stray. Smaller gardens, such as those on Station Parade and at Crescent Gardens, are also clean and attractive. High quality floral displays are a distinctive feature of the town centre and are important to visitor perceptions, as highlighted in Section 4 of this report. However, some other important areas of public realm, such as that around the Cenotaph, are adversely affected by traffic and visual clutter, often caused by on-street parking.

8.38 Areas of hard landscaping in the town centre, including the pedestrianised retail core, are well maintained and appear to be subject to an adequate regime of street cleaning. Some localised litter problems occur, associated with activity in the main shopping area, events in the town centre and late night activity in the Parliament Street/Montpellier Quarter area. Street furniture, including litter bins, is generally of a good quality and seating is provided at locations throughout the town centre. However, there is scope to improve the provision of outdoor seating at popular locations such as the Cenotaph.

8.39 There is also scope to provide higher quality paving materials in a number of locations such as Oxford Street. In many locations the use of quality local materials would help to complement the striking architecture of the town centre. Aside from the mature tree planting to the edges of The Stray there are opportunities to introduce new street planting within the town centre, particularly along the route of the A61 where this would soften the appearance of the street scene.

8.40 The main public conveniences within the town centre are located on Station Parade (within the Victoria Shopping Centre) and at the Jubilee multi-storey car park. Opening hours of the facilities at Station Parade reflect those of the shopping centre, whilst the facilities at the Jubilee car park operate extended hours including providing 24 hour access. These facilities are considered to be of adequate quality, though the public conveniences at Jubilee car park would benefit from improved directional signage.

Servicing and Utilities

8.41 Notwithstanding the historic nature of large parts of the town centre, servicing of commercial and residential premises appears to be adequate. However, the predominance of on-street parking in some locations such as James Street and Cheltenham Parade provides some scope for conflict with servicing arrangements. Particular attention should also be paid to the servicing of the Victoria Shopping Centre and large retail units to James Street and Cambridge Street where existing access is taken via Station Square, and any changes that affect access to the narrower streets of the Montpellier Quarter. There is also scope to reduce the visibility of waste storage facilities and service areas within the retail core of the town centre.

8.42 In addition to these general issues, the servicing of the HIC is a particular problem , given the way that the complex has grown over time and the current constraints this places on the site. Significant numbers of deliveries and collections are required to support some events and existing servicing facilities could be extended and improved to increase the efficiency of these operations. We also note that delivery vehicles are currently required to park in the holding area at Dragon Road.

8.43 In terms of utility provision within the town centre (electricity, gas and water supplies), we understand that local development within the town centre would not have a significant effect on the strategic networks and there would be no constraints on local growth in this respect. The electricity distribution company in the area is Northern Powergrid and the gas distribution company is Northern Gas Networks. Yorkshire Water has responsibility for water supply and infrastructure. Further discussions would need to take place with suppliers in respect of any specific infrastructure requirements associated with the development of physical projects recommended by the HTCSM.

Safety and Security in the Town Centre

8.44 In general terms, Harrogate Town Centre provides a safe environment for residents and visitors. Natural surveillance is good throughout the town centre and is supported by the distribution and mix of activity, including flows of pedestrians and vehicular traffic. There are very few vacant or derelict sites within the town centre that might reduce perceptions of safety.

8.45 There is a CCTV network within the town centre that is supported by Radiolink facilities to which many retailers within the town centre subscribe. A Radiolink co-ordinator is supported by membership fees received from subscribers. Night-safe marshalls operate in the town centre at the weekend between the hours of 10pm and 4am to support the police and door supervisors.

8.46 Crime data provided by North Yorkshire Police for the three month period to November 2014 highlights those parts of the town centre which suffer concentrations of criminal activity and anti-social behaviour. Reported incidents within the town centre are concentrated in two broad areas; the retail core around Cambridge Street and the Parliament Street/Kings Road area. In terms of the latter, there are a range of incidents, although these mainly relate to shoplifting and anti-social behaviour.

8.47 The most commonly reported incidents on Parliament Street and Kings Road (including the Royal Baths and the lower end of Oxford Street) relate to anti-social behaviour. There is also a concentration of reported offences in this area relating to violence and drugs, however it must be noted that the overall number of incidences is relatively low. Other incidents are fairly evenly distributed in low numbers throughout other parts of the town centre.

Summary of Environmental Assets and Detractors

8.48 This review of the town centre environment has identified that Harrogate has a number of key assets that should be both preserved and enhanced by the HTCSM. A summary of the town centre's environmental assets includes:

- its important and attractive historic architecture and listed buildings. There is a consistent architectural style throughout the town centre with the majority of the buildings utilising local stone;
- an excellent mix of uses within a compact town centre with limited, but significant, redevelopment opportunities;
- a well-defined town centre retail core with a distinct Victorian architectural character;
- an established historic urban grain with interesting streets, alleys and squares;
- unique landscaped spaces including parks, formal gardens, street trees and floral displays; and
- a compact and walkable town centre with interlinked spaces.

8.49 A number of these assets are shown below in Figure 8.5.

Figure 8.5 Town Centre Environmental Assets


Station Parade – Victoria Jubilee monument & public garden square.


The Cenotaph – Cambridge & Prospect Crescents from Prospect Gardens


John Street – Cafe/Bar/Dining street ambience


Montpellier Quarter – Good street landscaping & floral display


Prospect Gardens and Montpellier Quarter


Bridge feature over Station Parade from Victoria Centre to Victoria Car Park

8.50 However, there are also a number of features within the town centre that detract from its overall environment. It will be important for the HTSCM to seek to address these issues as part of the overall strategy and specific masterplan projects. A summary of the features that detract from Harrogate's environment include:

- unattractive gateway buildings at the transport hub with poor integration and difficult movement across Station Parade;
- vehicular and pedestrian conflict at various locations throughout the town centre including Parliament Street, Kings Road and James Street;
- on-street car parking which visually obstructs the street scene and limits pedestrian movements, to the detriment of the overall functioning of the town centre and its public realm;
- a variable mix of signage and street furniture that lacks consistency;
- little use of local or natural materials within the streetscape to complement the stone buildings;
- a number of unattractive buildings and car parks, some of which have potential for redevelopment; and
- refuse collection and storage on side streets and alleys.

8.51 As described elsewhere within this section and at Appendix G, the particular areas which would benefit from environmental improvement to support the overall attractiveness of the town centre include the area around the transport hub and Station Parade, Bower Road, Dragon Road, Station Avenue and the Parliament Street/Kings Road junction.

8.52 Some examples of the features that detract from the town centre environment are shown below in Figure 8.6.

Figure 8.6 Town Centre Environmental Detractors

Traffic and road side parking along James Street is a visual an physical obstruction

Poor gateway, dreary environ at bus & rail interchange

Unattractive & bleak pedestrian streetscape, ‘carpeted’ in paviors

Important pedestrian thoroughfares blighted by bins refuse collection

Signage pollution on attractive frontages

Poor gateway to the town centre

9 TRANSPORT INFRASTRUCTURE REVIEW

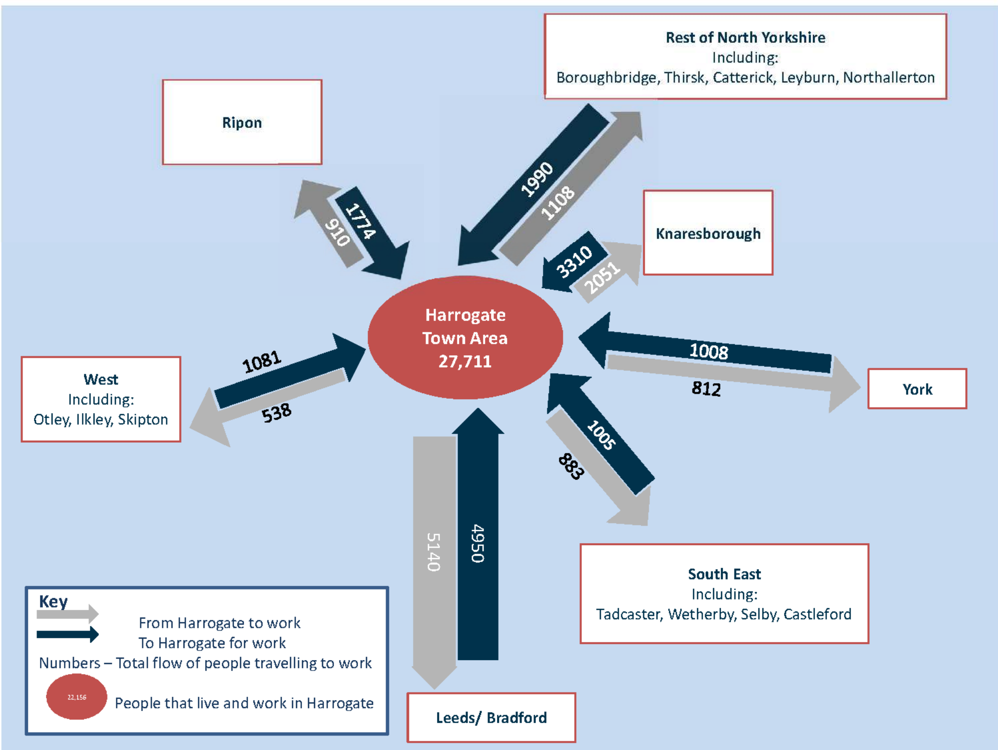
Introduction

9.1 This section reviews the state of the transport infrastructure that currently serves Harrogate Town Centre. As has been demonstrated in earlier sections of this report, transport is a key issue for the future development of the town centre and will need to be considered carefully in preparing the HTCSM. The scope of this assessment includes walking and cycling, public transport, parking and the local highway network.

Journey to Work Data

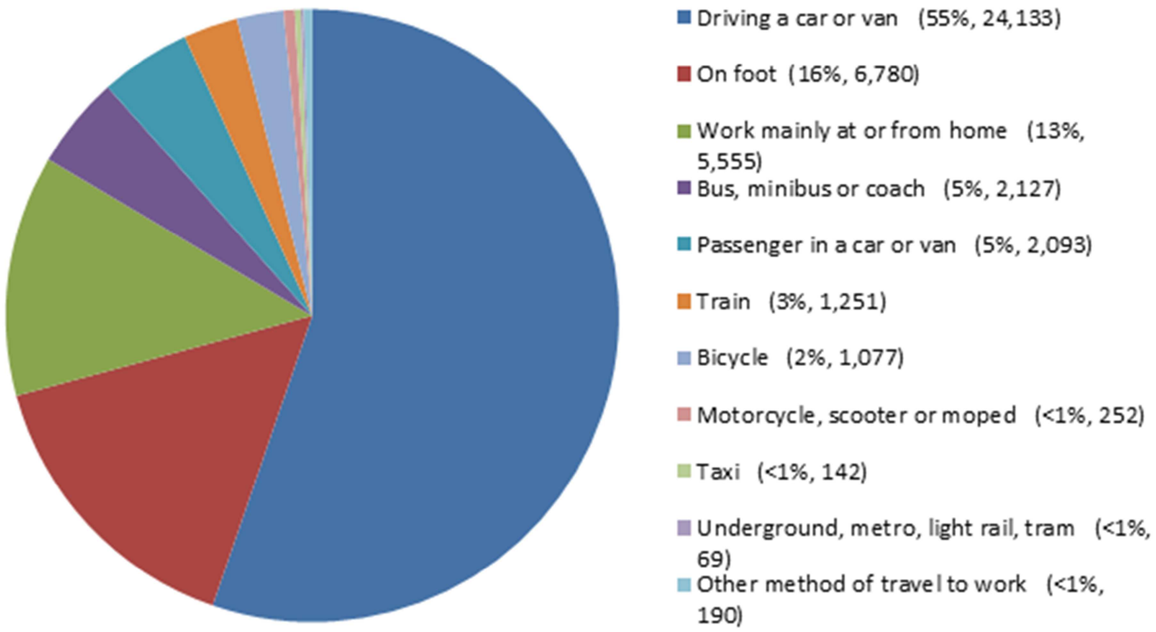
9.2 PBA has undertaken some analysis of journey to work statistics using data from the 2011 Census. Figure 9.1 below shows the key flows in and out of the town. Note that the number of people that live and work in Harrogate shown in Figure 9.1 includes the 5,555 workers within the Harrogate area who mainly work at/from home. It can be seen that a significant proportion of people who live in the Harrogate area also work within Harrogate (27,711 in total). A sizeable number of Harrogate residents also travel to work in the Leeds and Bradford area (5,150 residents); as well as to Knaresborough (2,051) and other destinations within North Yorkshire. Figure 9.1 also highlights the significant flows of commuters into Harrogate, with particularly high levels of in-commuting from the Leeds/Bradford conurbation (4,950), the neighbouring town of Knaresborough (3,310) and from Ripon (1,774).

Figure 9.1 Commuter Flows in and out of Harrogate (2011 Census Data)



9.3 We have also reviewed the mode of travel for journeys to work by Harrogate residents (see Figure 9.2 below). Due to the relatively high proportions of people who live and work in Harrogate, there are significant numbers of people who walk to work (16 per cent) which is notably higher than many other towns and cities in the north of England (the average figure for local authorities in the north of England is 10.6 per cent). Around 60 per cent of residents either drive to work or are a passenger in a car. Bus use is relatively low in the town, with only 5 per cent of residents travelling to work by bus (perhaps due to the relatively short distances that people are travelling to get to work); and only 2 per cent of the local population cycle to work. It can also be seen from Figure 9.2 that a relatively high proportion of Harrogate residents work from home (13 per cent).

Figure 9.2 Mode of Travel to Work by Harrogate residents



Walking and Cycling

9.4 The County Council's draft Wayfinding Strategy highlighted primary walking routes within the town centre (shown in Figure 9.3 below). These reflect main corridors of activity, running in both north/south and east/west directions. In addition, the draft Strategy also identified locations within a 5 minute walk of the War Memorial (at the heart of the town centre) and these are shown in Figure 9.4.

9.5 Figure 9.4 shows that key facilities within the town centre are within a reasonable walking distance, including the International Conference Centre, the bus and train stations, as well as key shopping destinations. This indicates that key facilities can be easily accessed by walking and that linked trips between key facilities by walking are also possible.

Figure 9.3 Primary Town Centre Pedestrian Routes

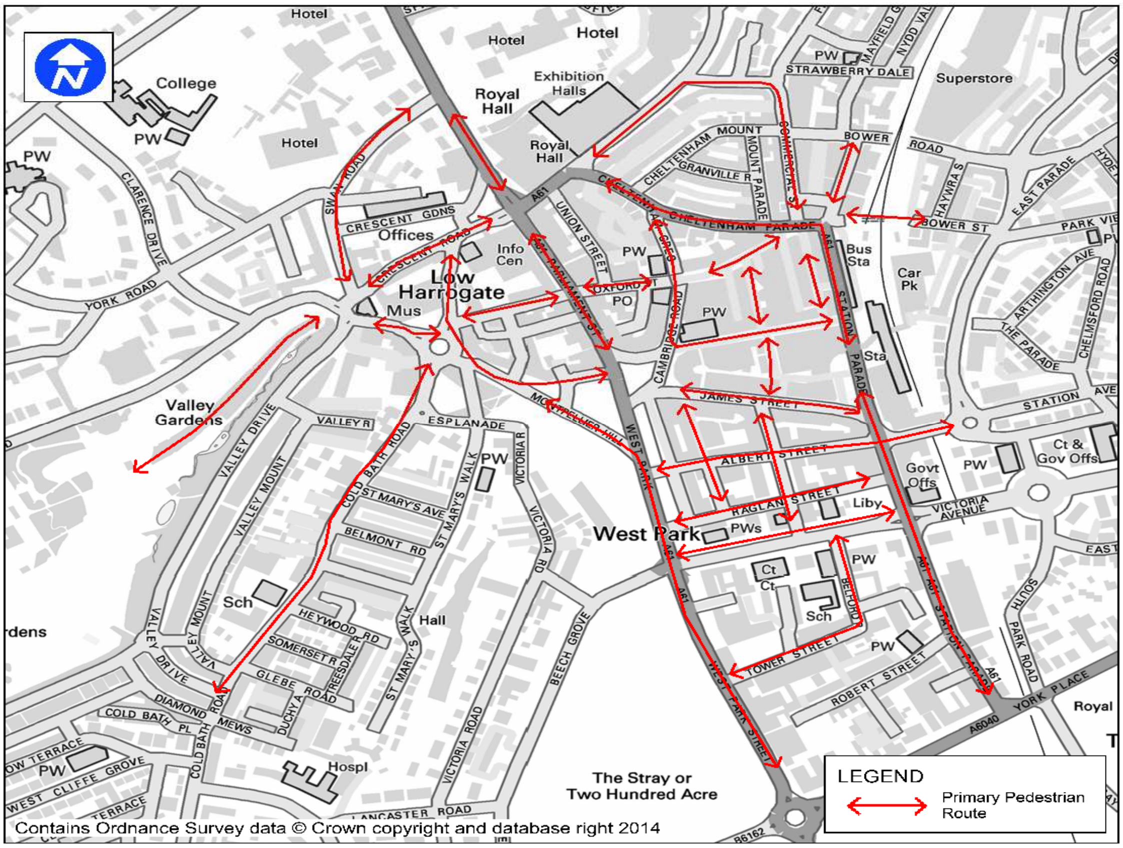
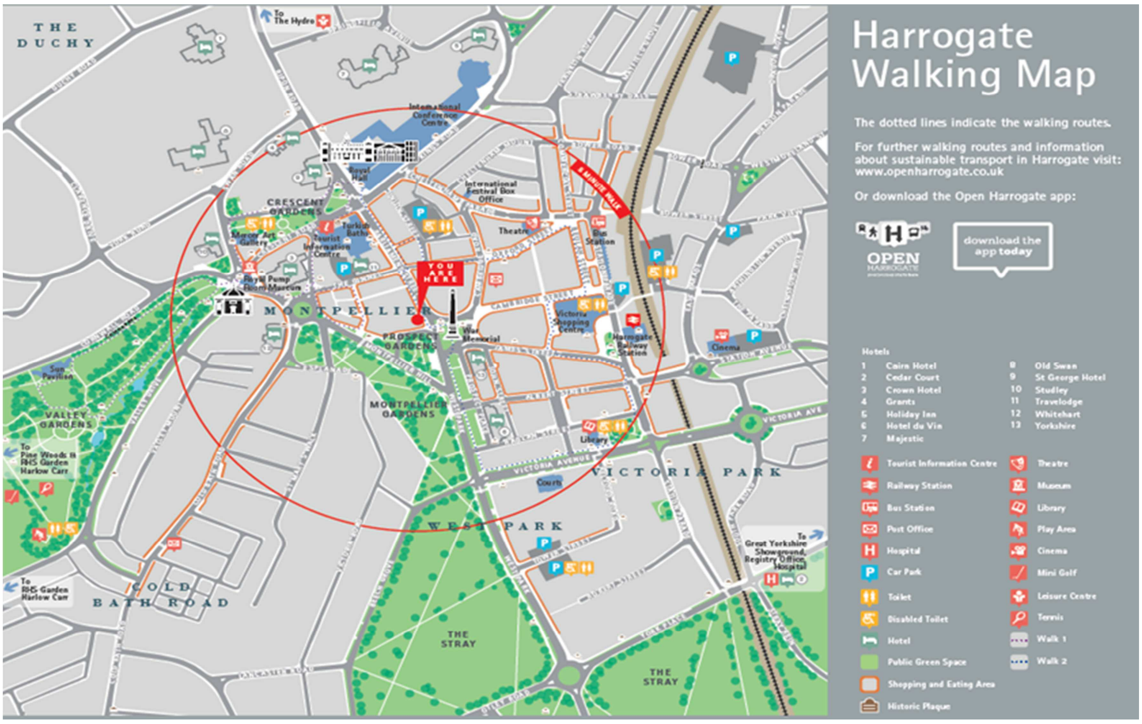


Figure 9.4 Harrogate Walking Map



Source: Placemarque

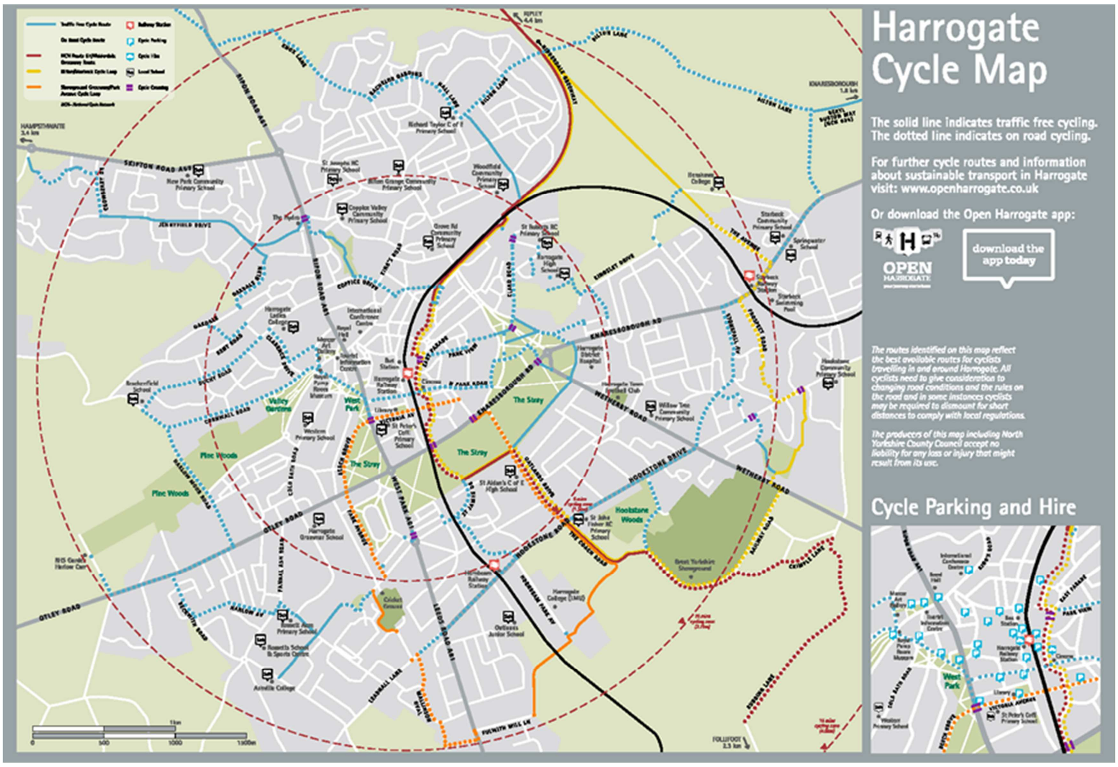
9.6 The Wayfinding Strategy that has been developed for Harrogate Town Centre will further help to encourage people to walk and it will assist pedestrian flows around the town centre. The first pilot totems and finger post signs have now been installed and are shown in Figure 9.5 below. It is expected that further signage infrastructure will be rolled out across the town centre into 2015 to support the Strategy.

Figure 9.5 New Wayfinding Totem and Finger Post Signs

9.7 A cycle map, showing cycle routes across the Harrogate urban area is available on the Open Harrogate website, and is shown in Figure 9.6. This shows that the town centre is served by several on-road cycle routes (indicated by dashed lines) from a range of destinations. These include the National Cycle Network Route 67/Nidderdale Greenway Route (shown in brown in Figure 9.6), the Bilton/Starbeck Cycle Loop (shown in yellow in Figure 9.6), as well as the Showground Greenway/Park Avenue Cycle Loop (shown in orange in Figure 9.6).

9.8 Figure 9.6 also shows that there is good cycle parking provision within the town centre, and this has been further improved by recent investment (see details below). There is also a cycle hire facility available at the railway station and in close proximity to the town centre bus station. Cycle facilities within the town centre are therefore reasonably good and provide a basis on which to encourage further journeys by bike.

Figure 9.6 Harrogate Cycling Map



Source: Open Harrogate (http://www.openharrogate.co.uk)

9.9 However, as shown by Figure 9.7, the quality of the cycle infrastructure within the town centre is variable with some on-road routes poorly marked out or providing limited function, being poorly integrated with the wider network of cycle routes.

Figure 9.7 Cycle Infrastructure (North Park Road & East Parade)

9.10 As part of North Yorkshire County Council's 2012 bid for Local Sustainable Transport Fund (LSTF) funding, several pedestrian and cycling improvements were proposed in Harrogate and Knaresborough. Pedestrian and cycling improvements that have now been completed include:

- Showground Greenway - the Greenway provides a shared surface path for cyclists and pedestrians travelling to the Great Yorkshire Showground site via existing public rights of way and bridleways. It aims to encourage those attending events at the Yorkshire Showground to alight at the nearby Hornbeam Park Rail Station and use this new route to reach their destination;
- the installation of a Toucan crossing at York Place/Oatlands Drive;
- a cycle route link between Park Chase and Bower Street (including the upgrading of a Toucan Crossing at East Parade/Park View);
- the provision of additional cycle storage at key locations in the town centre (44 new cycle parking spaces introduced or upgraded with a further 22 new spaces to be introduced in the 2014/15 financial year);
- Knaresborough Road/Church Square crossing upgrade and contraflow cycle lane (crossing upgrade works are now complete, with the contraflow cycle lane to be completed in the 2014/15 financial year);
- a new Pelican Crossing outside the entrance to Harrogate Railway Station; and
- the implementation of Phase 1 of the new town centre pedestrian Wayfinding signage.

9.11 In addition, planned pedestrian and cycling improvements for 2014/2015 include the following:

- improvements to pedestrian crossings at the Cheltenham Crescent/Kings Road junction (this will support pedestrian activity around the Conference Centre);
- providing shared use of the 'One Arch' pedestrian subway that is located to the north of the railway station;
- the creation of shared space at the junction of Cheltenham Crescent and Cheltenham Parade;
- improvements to pedestrian crossings at Lower Station Parade/Cheltenham Parade to provide better access to the bus station (officers are developing a scheme with a view to consulting with stakeholders as soon as a design is confirmed.);
- upgrading cycle signage; and
- Harrogate Hospital cycle link (officers are still considering alternative ways to assist cyclists crossing the Wetherby Road with a view to consulting with stakeholders as soon as a design is confirmed).

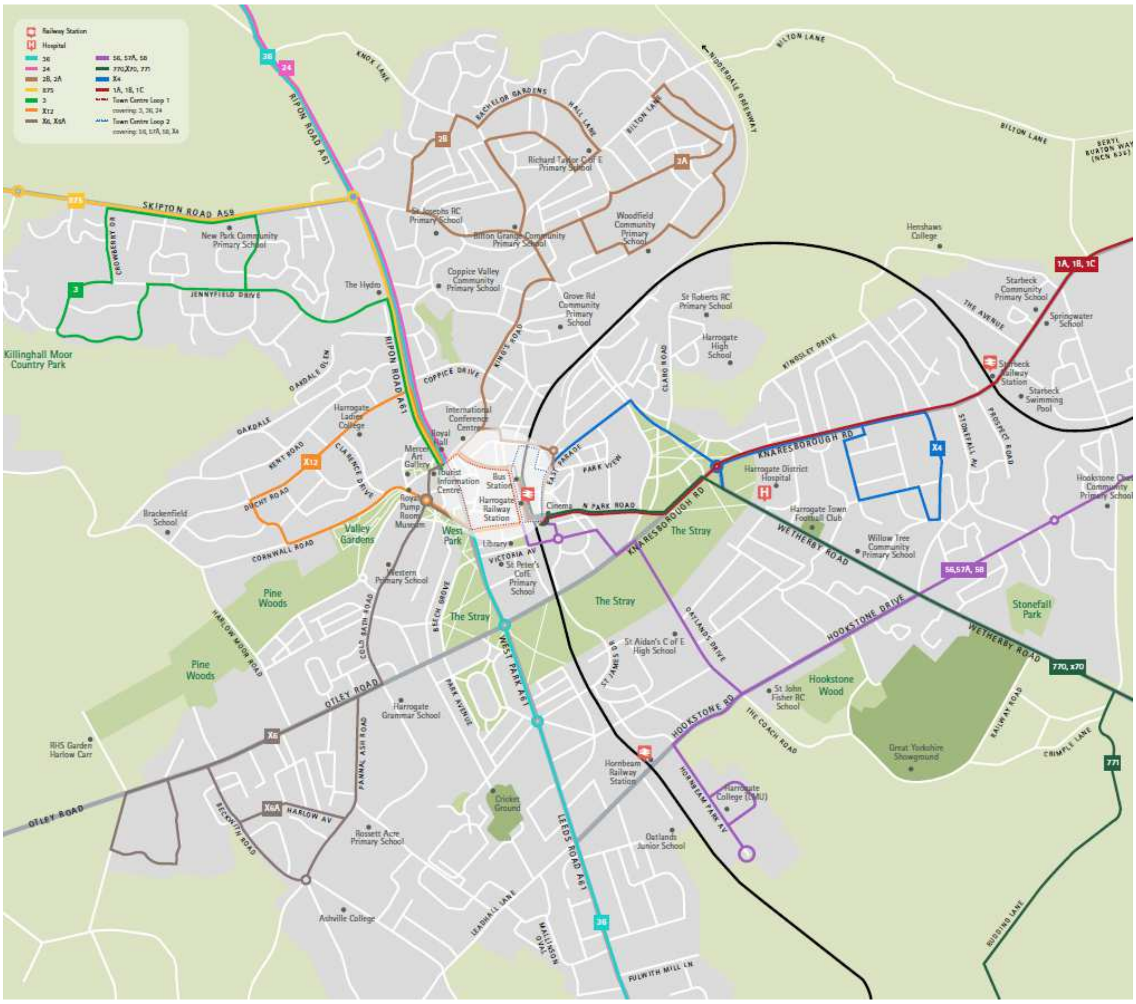
9.12 Maps of both completed and planned pedestrian and cycling improvements are provided in Appendix H.

Public Transport

Bus Services

9.13 A range of bus routes serve Harrogate Town Centre and a map of current services is shown in Figure 9.8 below.

Figure 9.8 Public Transport Map



Source: Placemarque

9.14 A summary of the main services which serve the town centre during the week is provided in Table 1 of Volume 2 Appendix I, along with route and operator information. Similar information is provided for services which serve the town centre at the weekend in Table 2 of Appendix I. These tables show that there are a range of regular services connecting the town centre to destinations across the urban areas of Harrogate and Knaresborough. The town also benefits from good longer distance services, especially to Leeds, Ripon and Wetherby.

9.15 The two main bus operators within Harrogate are Transdev Harrogate and District (H&D), which operate the most frequent services, and Harrogate Coach Travel using the Connexions brand. A range of fares are available from Transdev Harrogate and

District (H&D). The various ticket types and prices are summarised below in Table 9.1.

Table 9.1 Transdev Ticket Prices (offline ticket prices[6])

	GoldCard	Zone One	Start Tickets	Leeds 7	Go Leeds
Services available	All H&D services including 36	All H&D services including 36 within Harrogate and Knaresbourgh	All H&D services between Harrogate and Starbeck	36,770, 771 and 760	36, 770. 760 and Coastliner (within route restrictions)
Cost of Day Ticket	£8.00	£4.20	N/A	£14.00	N/A
Cost of 7-Day Ticket	£32.00	£19.00	N/A	N/A	N/A
Cost of 1 Month Ticket	£93.00	£55.00	£34.00	N/A	£56.00
12 journey ticket	£35.00	£20.00	£11.00	N/A	£20.00
Cost of 3 Month Ticket	£265.00	N/A	N/A	N/A	N/A
Cost of 6 Month Ticket	£477.00	N/A	N/A	N/A	N/A
Cost of 12 Month Ticket	£840.00	N/A	N/A	N/A	N/A

9.16 A range of fares and tickets are also available from Connexions. A summary of the tickets and fares for the main routes is shown below in Table 9.2.

Table 9.2 Connexions Ticket Prices[7]

	Connexions	Knaresborough Connexions X1	Wetherby Connexions X70	Otley Connexions	Starbeck Connexions X1
Services available	Valid across all Connexions Routes	Valid between Harrogate and Knaresborough on the X1 service.	Valid between Harrogate and Wetherby on service X70.	Valid between Harrogate and Otley on services X52 and X53.	Valid between Starbeck and Harrogate on service X1
Cost of Day Ticket	£7.00	N/A	N/A	N/A	N/A
Cost of 7-Day Ticket	N/A	£9.00	£15.00	£24.00	£7.00
Cost of 1 Month Ticket	N/A	£35.00	£60.00	£90.00	£26.00
Cost of 12 Month Ticket	N/A	£400.00	£700.00	£1,000	£360.00

9.17 The information in Tables 1 and 2 of Appendix I, as well as bus route information provided by Traveline Yorkshire[8] and Metro[9], has been used to identify the frequency

[6] http://www.harrogatebus.co.uk/fares/HarrogateAndDistrict/DayPeriodAnd12-journeyTickets_11.html (correct as of 04/08/2014)
[7] www.mymobiletickets.com (correct as of 04/08/14)
[8] http://www.yorkshiretravel.net/welcome.do
[9] https://www.wymetro.com/yournextbus/

of services from each bus stop in Harrogate. The frequency of services for weekdays and Saturdays, and Sundays, is shown in Figures 9.9 and Figure 9.10 respectively.

Figure 9.9 Weekday and Saturday Frequency of Services

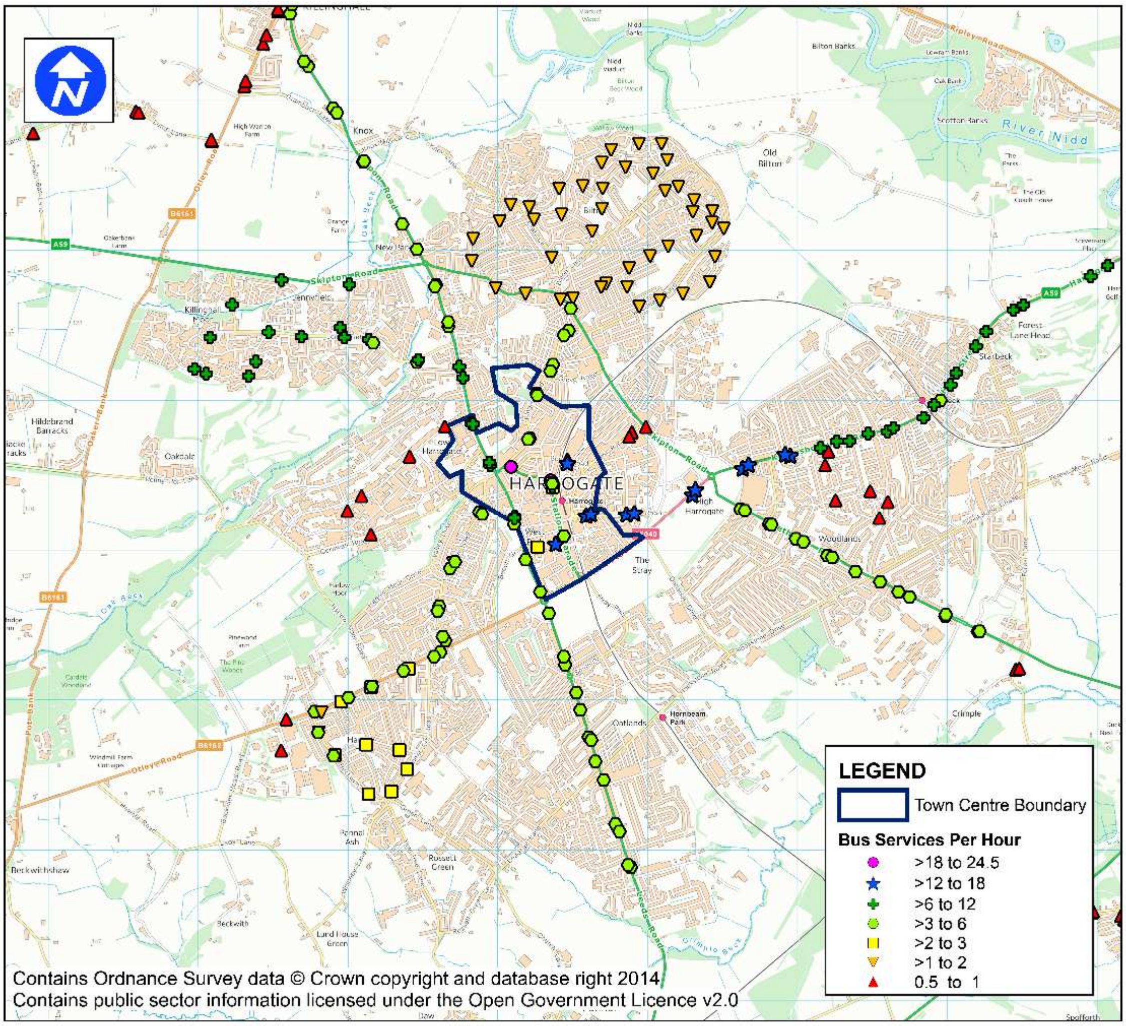
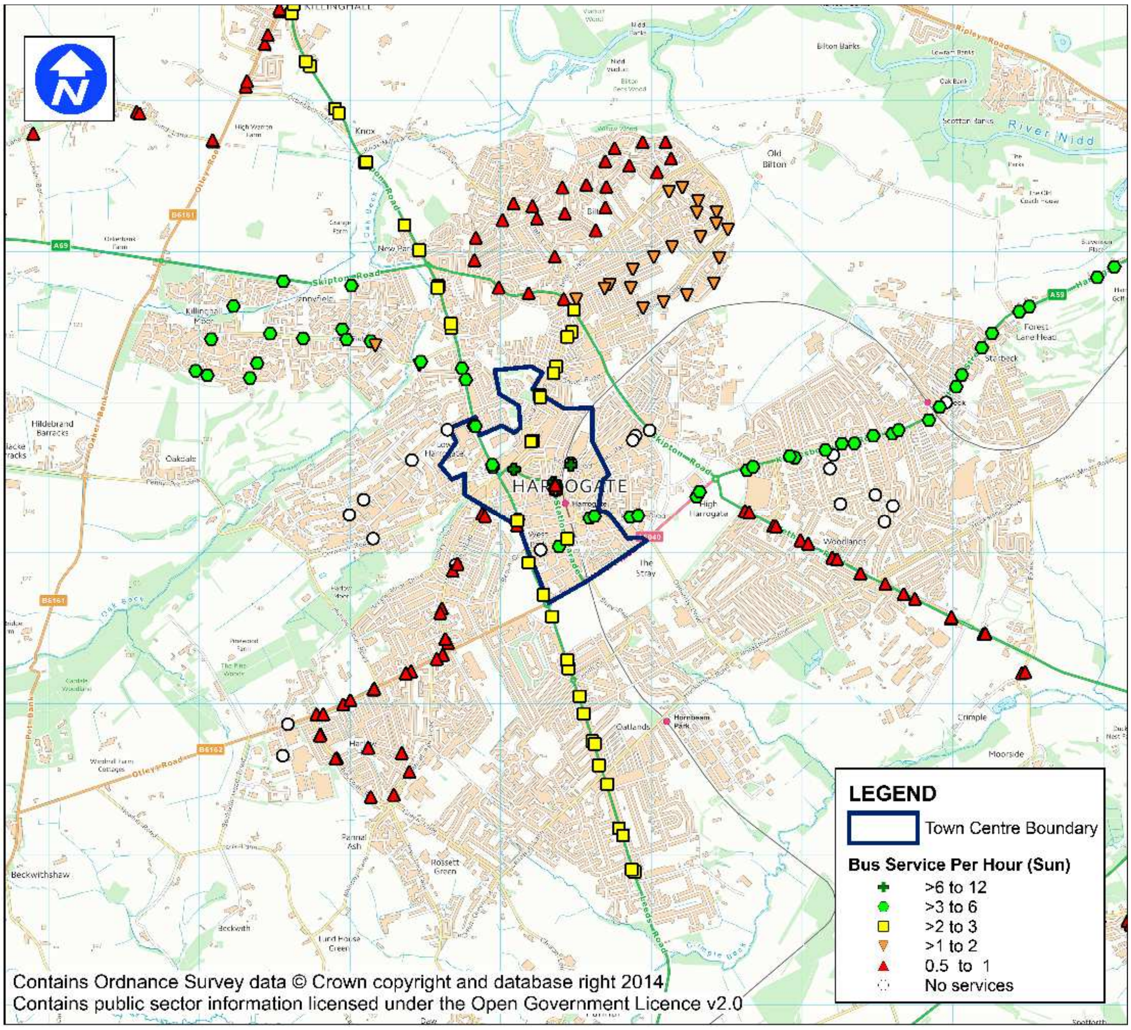


Figure 9.10 Sunday Frequency of Services



9.18 As shown by Figure 9.9 Harrogate Town Centre is served by a number of frequent bus services during the week and on Saturdays. In addition, Figure 9.9 identifies clear public transport corridors. These include:

- along the A61 (Ripon Road and Leeds Road) which runs north to south through the town centre; and
- along the A59 (Harrogate Road), which runs from the town centre to the east towards Knaresborough.

9.19 However, Figure 9.9 indicates that there are areas immediately to the west and east of the town centre are served by the low frequency X12 and X4 bus services respectively (both have a frequency of 1 per hour) e.g. around Kent Road/Duchy Road to the west of the town centre and the area to the north of High Harrogate.

9.20 As demonstrated in Figure 9.10, the town centre is also served by relatively frequent bus services on a Sunday, with relatively high frequencies along the main transport corridors highlighted above. However, the areas immediately to the west and east of the town centre which have limited services on other days, are not served by any bus services at all on Sundays.

9.21 Discussions with the Integrated Passenger Transport Team at North Yorkshire County Council indicated that the punctuality and reliability of bus services is considered reasonable, with no congestion issues relating soley to public transport. However, the discussions highlighted that pedestrian links to the Harrogate Bus Station are currently unattractive and this is considered to be a critical issue by the County Council.

9.22 Improvements to public transport services within Harrogate were included within North Yorkshire County Council's 2012 bid for LSTF funding. Completed improvements to date include:

- encouragement of bus usage on the A61 corridor through advertising and promotion as well as the installation of two new real time passenger information displays at Harrogate District Hospital;
- access to real time passenger information via mobile and smartphone technology is now provided from each of the 22 bus stops along Wetherby Road; and
- The Stray/Christ Church bus stop has also been relocated closer to the Empress roundabout and a bus shelter installed together with raised kerbs and a footway.

9.23 In addition, works are taking place to upgrade the traffic control system in the Harrogate area with the aim of minimising traffic congestion and improving bus priority. Procurement for the new Harrogate wide Urban Traffic Control system which will provide the system to enable a new bus priority system to function has commenced with the bus pre-emption system being implemented at traffic signals across the town later in 2014/15.

Rail Services

9.24 Harrogate Rail Station offers frequent services to a number of destinations, including Leeds, Knaresborough and York. A summary of services to main destinations is shown in Table 9.3.

Table 9.3 Rail Service Frequencies from Harrogate Station

Destination	Trip Time	Weekday frequency per hour (first and last services from Harrogate[10])	Saturday frequency per hour (first and last services from Harrogate)	Sunday frequency per hour (first and last services from Harrogate)
Leeds	40 mins	2 (06:05 – 20:43 1 (20:44 – 22:47)	2 (06:06 – 18:44) 1 (18:44 – 22:37)	1 (09:53 – 23:12)
Knaresborough	10 mins	2 (06:46 – 19:03) 1 (20:03 – 22:03)	2 (06:46 – 19:03) 1 (19:03 – 21:56)	1 (10:48 – 21:54)
York	30 mins	2 (06:46 – 08:21) 1 (08:21 – 21:03)	2 (06:45 – 08:17) 1 (08:17 – 21:05)	1 (10:48 – 20:33)

9.25 Access to the station from the town centre is currently via a pedestrian crossing on Station Parade. An image is of the access is shown below at Figure 9.11.

[10] http://www.wymetro.com/uploadedFiles/WYMetro/Content/TrainTravel/traintimetables/Harrogate.pdf (valid from18 May to 13 December 2014

Figure 9.11 Station Access from Station Parade

9.26 There are significant upgrades planned for the rail service to/from Harrogate with proposals to double the frequency of services to both York and Leeds. It is hoped that the line will be electrified as a result of the Government task force work which is currently undertaking an assessment of competing lines to prioritise a selection for electrification. Funding for the double tracking of the line has been agreed, however funding for the electrification of the line has not yet been secured.

9.27 At present there are approximately 1.3 million entries and exits per year to and from the station, which is clearly a very important gateway for residents and a variety of different visitors. Further consideration needs to be given to how this entrance to the town centre functions and could be improved. The County Council does have funding to enhance this area, secured via the Tesco development on Skipton Road. In addition, the Harrogate line improvements are likely to generate significantly increased patronage and Harrogate needs to be in a position to capitalise upon this.

9.28 Discussions with the Integrated Passenger Team at North Yorkshire County Council and the transport planning officer at the Borough Council indicated that the need to improve pedestrian links to the rail station is a critical issue for the future success of the town centre.

LSTF 2015/2016 Bid

9.29 North Yorkshire recently submitted bids for the 2015/2016 round of LSTF funding, with the first being the Harrogate Integrated Travel Project. The measures within this bid include:

- comprehensive integrated travel information for commuters, students and visitors;
- improved customer convenience and confidence, with smarter ticketing and sustainable connectivity;

- targeted promotion of public transport options between York, Harrogate and Leeds; and
- improved community transport options in rural areas.

9.30 However, North Yorkshire's bids were not included in the list of successful projects published on the 11th July 2014[11].

Parking

9.31 In this section we consider the provision of off-street and on-street car parking within Harrogate Town Centre.

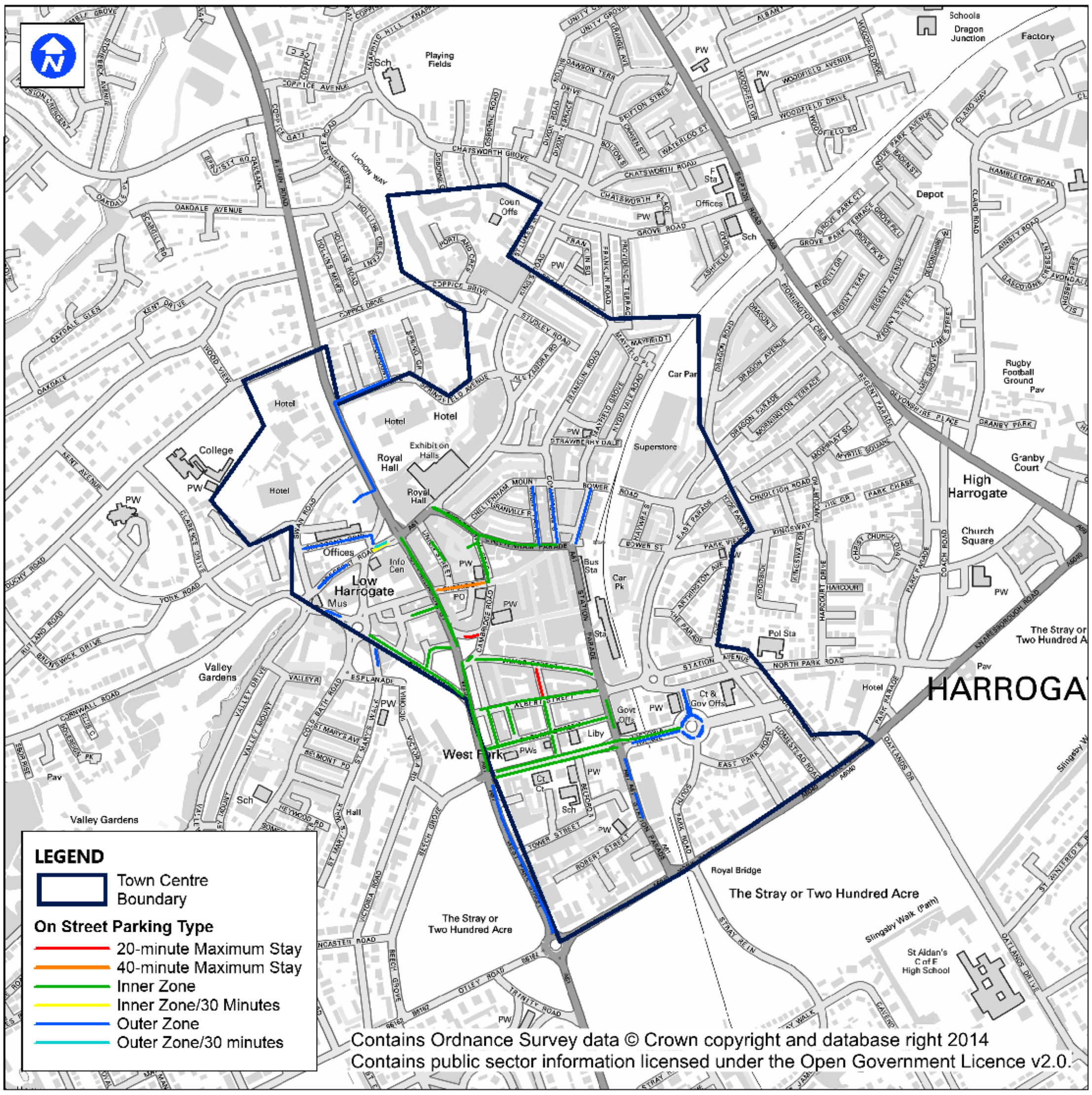
On-Street Parking

9.32 With regards to on-street parking, there are currently 1,004 on-street pay and display spaces and 4,114 on-street residents' permit/disc spaces within the town centre. On-street parking is subject to Civil Parking Enforcement (CPE), with CPE delivered by Harrogate Borough Council on behalf on North Yorkshire County Council.

9.33 The location of pay and display on-street parking is highlighted in Figure 9.12, based on information available from Harrogate Borough Council[12]. A small amount of on-street parking is limited to a maximum stay of 20 or 40 minutes with the majority, in both inner and outer zones, allowing for stays of up to 3 hours.

[11] https://www.gov.uk/government/publications/local-sustainable-transport-fund-funding-decisions-2015-to-2016
[12] http://www.harrogate.gov.uk/prkg/Pages/Parking-On-Street-PD.aspx

Figure 9.12 On-Street Parking in the Town Centre



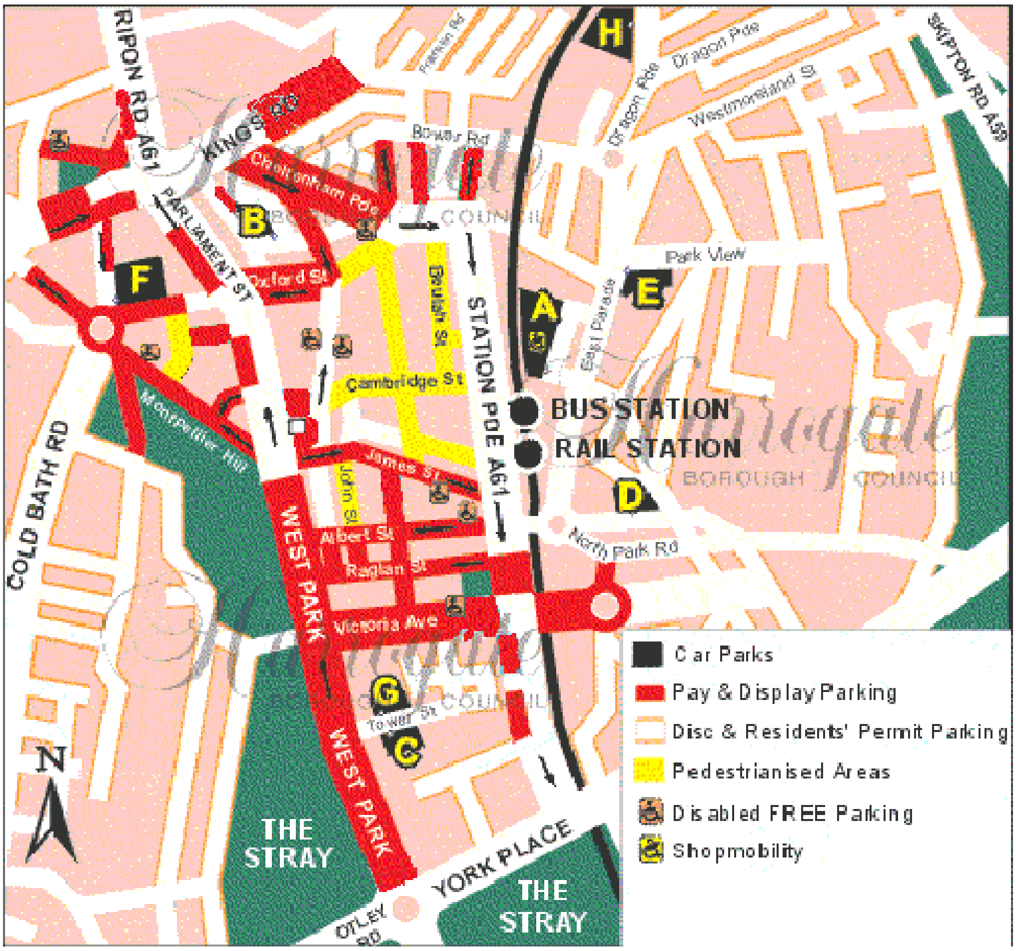
9.34 The pricing structure of the parking in Figure 9.12 is shown in Table 9.4. These charges apply from 8am to 6pm from Monday to Saturday (including bank holidays).

Table 9.4 On-Street Car Parking Pricing Structure

Time Period	Inner Zone	Outer Zone	20/40 Minute Maximum Stay
20 mins.	N/A	N/A	£0.50
30 mins.	£0.70	£0.60	N/A
40 mins.	N/A	N/A	£1.00
1 hour	£1.40	£1.20	N/A
1 hour 30 mins.	£2.10	£1.80	N/A
2 hours	£2.80	£2.40	N/A
2 hours 30 mins.	£3.50	£3.00	N/A
3 hours	£4.20	£3.60	N/A

9.35 The location of disc and residents' permit parking within the town centre is shown in Figure 9.13.

Figure 9.13 Location of On-Street Permit Parking within the Town Centre



Source: http://www.harrogate.gov.uk/prkg/Pages/Parking-Disc.aspx

9.36 Specific data relating to the occupancy levels of on-street parking facilities is not currently available for either pay and display or disc/permit parking. However, anecdotal evidence has been provided by the Parking Services manager:

- it is considered that the on-street pay and display parking in the central area is generally around 90/95 per cent full around the middle of the day; and
- in peripheral residential areas there are sufficient disc parking spaces available.

9.37 During PBA's visits to the town centre, we observed significant levels of on-street parking, with many areas across the centre being dominated by parked cars, often to the detriment of the street scene and to pedestrian and cycle movements. Some photos of on-street parking to James Street and Cambridge Road are shown below at Figure 9.14. There may be potential to rationalise on-street parking in certain areas to improve the public realm and to provide more space for pedestrian and cycling linkages. The Council might also consider reducing the permitted time limits for some on-street car parking in order to increase turnover.

Figure 9.14 On-street Parking on James Street and Cambridge Road

Coach Parking

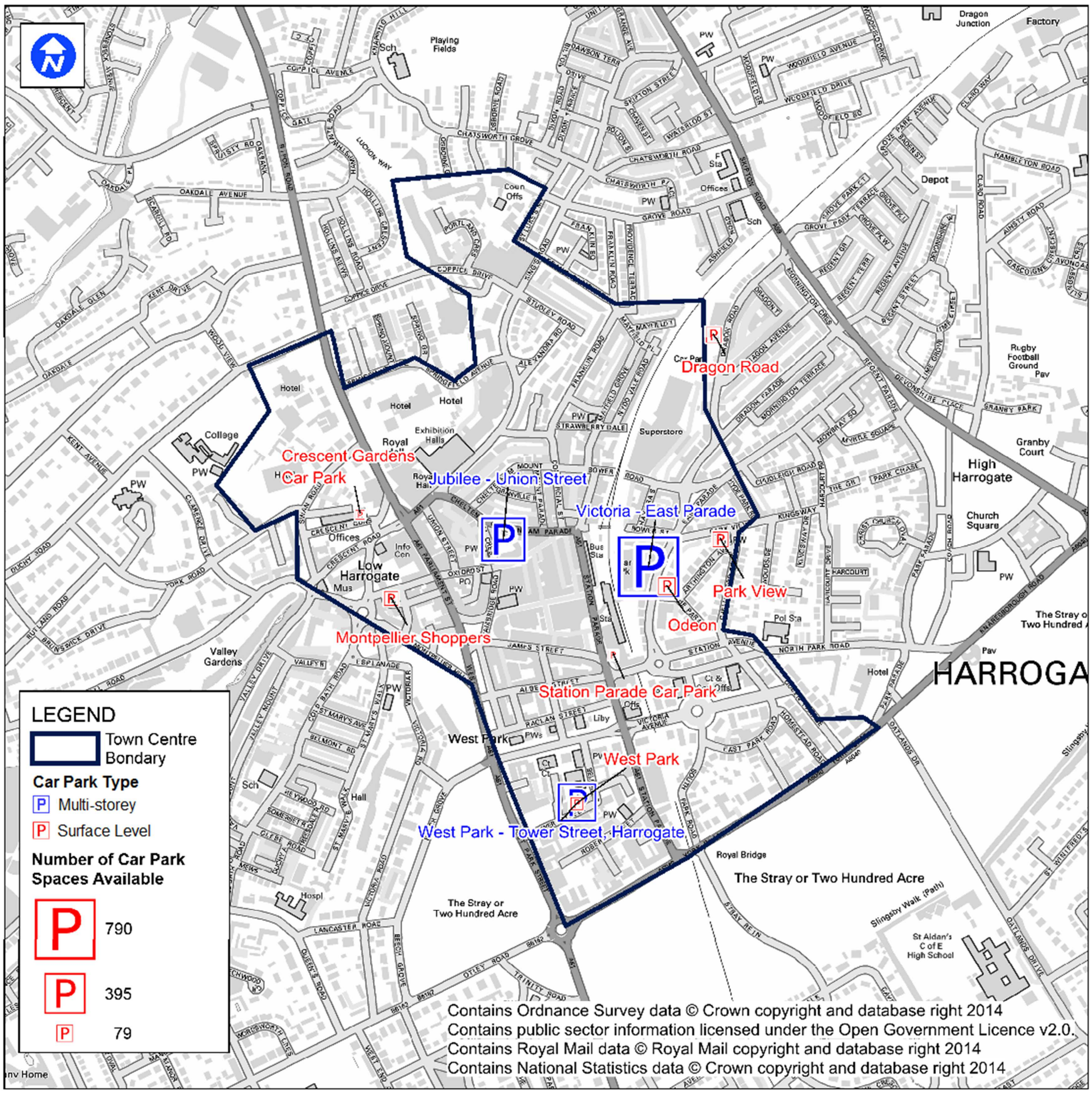
9.38 There is currently no designated coach park for Harrogate Town Centre. Dragon Road car park is used by coaches, but it is often closed for use as a holding area for vehicles servicing the Conference Centre. For example, there are significant periods between September and December 2014 when Dragon Road will be closed to coaches. However, the rendezvous point on St Mary's Walk, which incorporates sheltered passenger waiting facilities, is often used by coaches. Given the existing and potential importance of visitors arriving by coach to the local economy, it will be important to ensure that the future transport strategy for the town centre considers the provision of more formal parking facilities for coaches. It is important that such provision allows for overnight stays to provide a wider boost to the local visitor economy.

Off-Street Parking

9.39 Management of off-street parking is the responsibility of Harrogate Borough Council. The location of off-street parking in Harrogate Town Centre is shown below in Figure 9.15, based on information available from the Council's website[13].

[13] http://www.harrogate.gov.uk/prkg/Pages/Car-Parks-in-Harrogate.aspx

Figure 9.15 Off-Street Parking in the Town Centre



9.40 A summary of the spaces associated with each of the car parks shown in Figure 9.15 is summarised below in Table 9.5.

Table 9.5 Harrogate Town Centre Off-Street Car Parking Summary

Car Park	Total Car Parking Spaces[14]	Motor Bike Bay	Cycle Rack / Lockers	Harrogate Borough Council Parking Services Manager Comments
Victoria Multi-Storey Car Park (MSCP)	786	4	8	Usually about 35% full. However, does vary and busier at weekends. Full about 20 days per year. Mostly short stay users and tends to attract shoppers.
Jubilee MSCP	444	4	16	Usually about 60% full. Again varies due to events/conferences and Christmas. Probably full about 70 days per year. Mostly short stay and business users.
West Park MSCP	343	0	0	Usually about 30% full. Busier in run up to Christmas. New developments in area and leases agreed which will increase usage. New tariffs implemented in May 2014.
Odeon Surface Level Car Park (SLCP)	88	1	2	Generally 80% full during the day. Long stay users.
Park View SLCP	74	1	1	Generally 95% full during the day. Long stay users.
Dragon Road SLCP	73	0	0	25% full on days the car park is not being used by Harrogate International Centre (when it is closed to the public).
Montpellier Shoppers SLCP	56	0	0	Generally 100% full during the day. Long & short stay users.
West Park SLCP	50	0	2	Approximately 80% full with short term parking
Station Parade SLCP	25	0	0	Generally 100% full during the day. Short stay users.
Crescent Gardens SLCP	32	0	0	100% full Monday to Friday with permit holders, 90% full on the weekend with mixed long and short stay parking

9.41 As indicated in Table 9.5, the off-street car parks within the town centre are generally well used and the Parking Services Manager at Harrogate Borough Council was of the opinion that the car parks are pitched appropriately in terms of the mix and availability of short stay and long stay provision. The Parking Services Manager considered that West Park multi-storey car park is currently underutilised but new developments in the area and agreed leases are likely to increase usage of that facility.

9.42 With regard to occupancy, there is variance across the year depending on events and activities in the town centre, but peaks and troughs are largely consistent from year to year. Overall, the Borough Council's Parking Services Manager stated that off-street parking supply meets demand on all but 15 to 20 days of the year, especially during the weekends that lead up to Christmas.

[14] Including disabled and mother and baby

9.43 The pricing structure of the parking facilities in Table 9.5 is shown in Table 9.6. These charges apply from 8am to 6pm from Monday to Saturday (including bank holidays). Parking closer to the main shopping area is more expensive than parking on the periphery of the town centre and, in general, tariffs in multi-storey car parks are more expensive than surface level car parks.

Table 9.6 Off-Street Car Parking Tariffs

Car Park	Up to 1 hr	Up to 2 hrs	Up to 3 hrs	Up to 4 hrs	Up to 5 hrs	Up to 9hrs	Up to 12 hrs	Up to 24 hrs	Evening charge 6pm to midnight
Victoria - East Parade	£1.30	£2.60	£3.90	£5.20	£6.50	£11.70	-	£13.00	N/A
Jubilee - Union Street	£1.40	£2.80	£4.20	£5.60	£7.00	£12.60	-	£14.00	N/A
West Park - Tower Street	£0.70	£1.40	£2.00	£3.30	-	-	£4.80	£6.20	N/A
Odeon	£0.70	£1.40	£2.10	£2.80	£3.50	£6.30	-	£7.00	£1.10
Park View	£1.70	£1.40	£2.10	£2.80	£3.50	£6.30	-	£7.00	£1.10
Montpellier Shoppers	£1.10	£2.20	£3.30	£4.40	£5.50	£9.90	-	£11.00	£2.20
West Park	£0.70	£1.40	£2.10	£2.80	N/A	N/A	N/A	N/A	£1.10
Dragon Road	£0.00	£1.40	£2.60	£4.80	-	-	-	£6.20	£1.10
Station Parade	£1.60	£3.20	£4.80	£6.40	N/A	N/A	N/A	N/A	N/A
Crescent Gardens	£1.20	£2.40	£3.60	£0.00	N/A	N/A	N/A	N/A	N/A

Responses to HTCSM Visitor and Business Surveys

9.44 Some 36 per cent of respondents to the business survey indicated that more car parking would support the growth of their business, with 67 per cent indicating that improvements to town centre parking should be a priority. These views contrast with the car parking data for off-street car parks, which suggests significant spare capacity in several large town centre car parks.

9.45 The visitor survey results showed that 7.5 per cent of visitors stated that they disliked the ‘difficult/expensive car parking’ within the town centre, with 10.4 per cent indicating that Harrogate could be improved by ‘more or better parking’, and 1.0 per cent indicating that Harrogate could be improved by ‘cheaper’ car parking.

Access and Servicing

9.46 The predominance of on-street parking and traffic within the town centre not only detracts from the street scene and pedestrian movement but it can also be detrimental to the effective servicing of local businesses. This is exacerbated by the many narrow historic streets within the town centre. Hence, it is important that any changes to the highway network and parking provision in the town centre needs to take into account the servicing requirements of local businesses, and that a balanced strategy which considers all local road users is developed. Particular attention will need to be paid to the servicing of the Victoria Shopping Centre and large retail units to James Street and Cambridge Street where existing access is taken via Station Square, and any changes that affect access to the narrower streets of the Montpellier Quarter.

Highway Network

9.47 A strategic traffic assessment of the impacts of proposed growth in Harrogate and Knaresborough (2009 to 2014) was undertaken in November 2013 as part of the evidence base for the now withdrawn Harrogate District Sites & Policies DPD[15].

9.48 This involved assessing the strategic traffic impact of the preferred site options using the Harrogate and Knaresborough traffic model, developed for North Yorkshire County Council (further details of the model and assumptions can be found within the report). In the assessment, the following scenarios were compared:

- 2009 base – the results of the traffic impact of traffic surveys undertaken in 2009;
- Baseline 2024 – the results of the traffic impact of the growth attributed to increases in car usage by the existing population and increases in car usage from the implementation of major extant planning permissions; and
- DPD Scenario 2024 – the addition of the traffic impact of the draft site allocations proposed for Harrogate and Knaresborough in the Sites and Policies DPD (now withdrawn).

9.49 Scenarios were based on a PM peak (17:00- 18:00) on an average weekday (Monday to Friday). The evening peak was selected as the worst of the two peak hours and was based on actual traffic flows from the County Council's automatic traffic counters and journey times on the network.

9.50 The results of the assessment for each scenario are shown in Figures 9.16, 9.17 and 9.18 below.

[15] http://www.harrogate.gov.uk/plan/Documents/Planning%20Policy/Evidence%20Base/DS-P-LP_StrategicTraffic-Nov2013.pdf

Figure 9.16 Modelling Results for 2009 Base Scenario

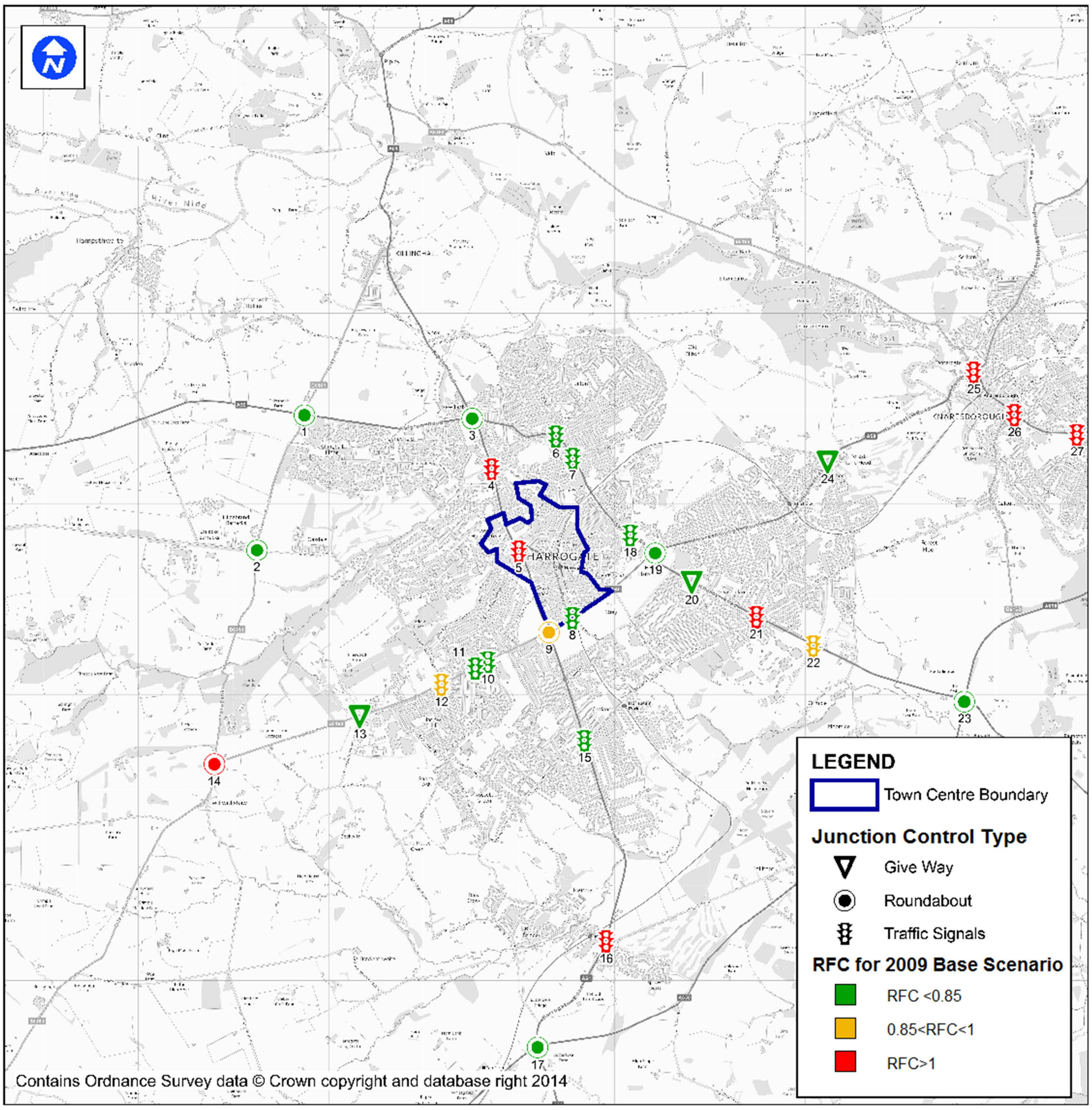


Figure 9.17 Modelling Results for 2024 Baseline Scenario

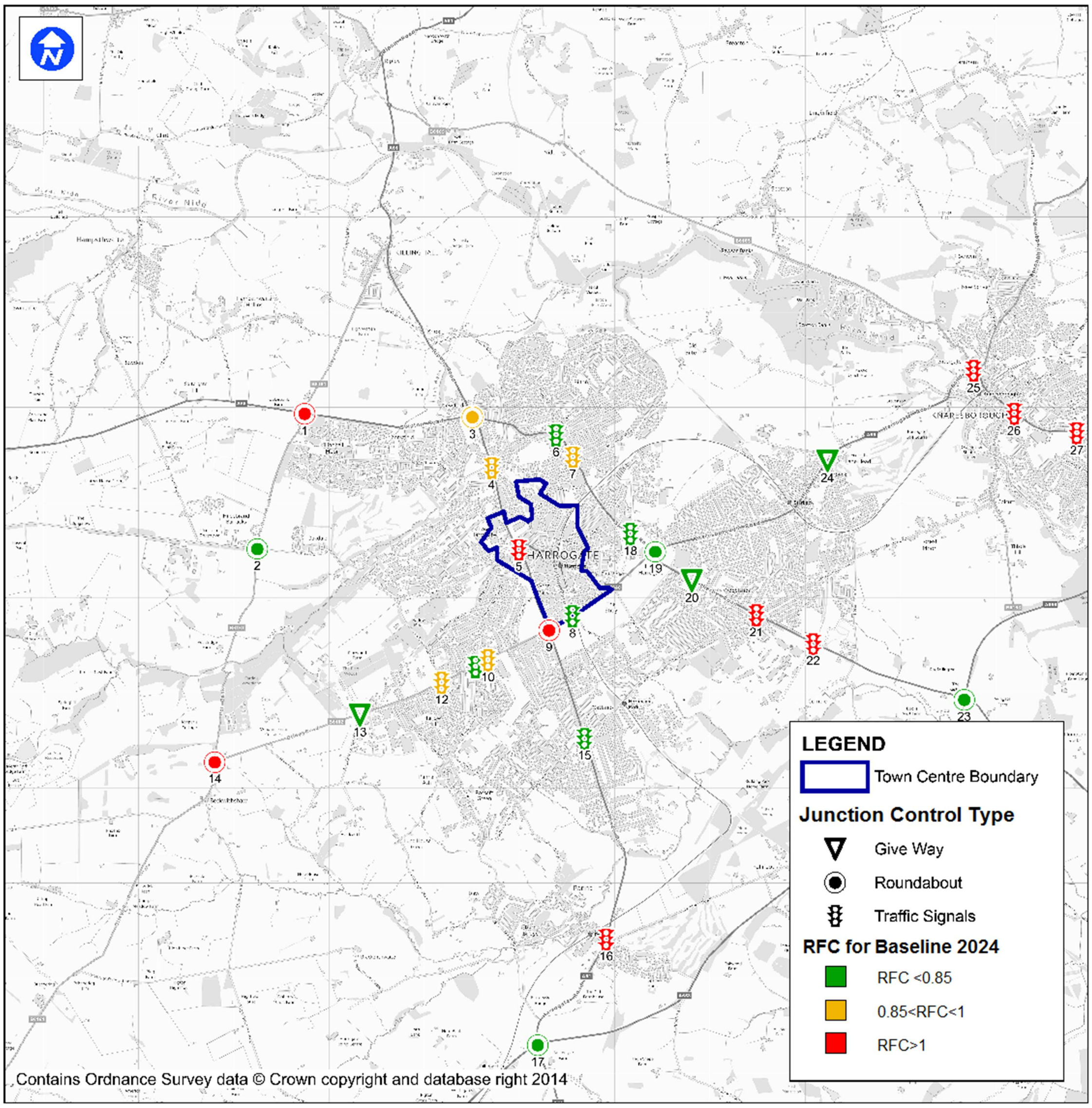
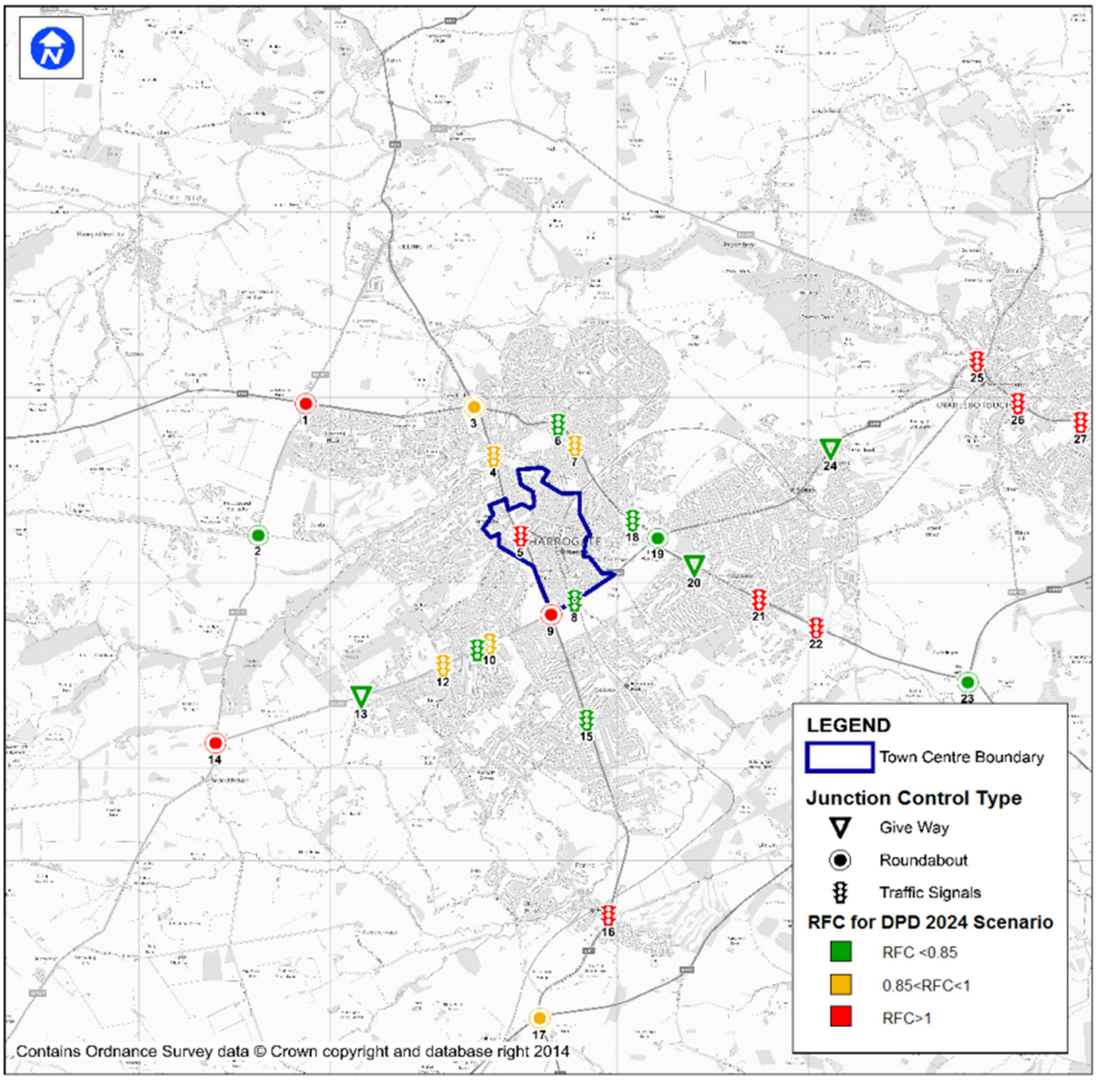


Figure 9.18 Modelling Results for DPD 2024 Scenario (without improvements)



9.51 As indicated by Figure 9.16, several junctions in the vicinity of the town centre are currently operating above or near capacity. This includes:

- Junction 4: Ripon Road/Jenny Field Drive traffic signals – operating at above capacity;
- Junction 5: Parliament Street/Ripon Road/King's Road traffic signals – operating above capacity; and
- Junction 9: Prince of Wales Roundabout – operating near capacity.

9.52 In addition to the above, discussions with the Highways and Transportation department of North Yorkshire County Council indicated that key locations which currently suffer congestion include Skipton Road/A59 and Bond End junction (Knaresborough Road/Starbeck – Junction 27).

9.53 As indicated by Figures 9.17 and 9.18, although the performance of Junction 4 is expected to improve in both 2024 scenarios, Junctions 5 and 9 are expected to continue to operate above capacity, with Junction 3 (Skipton Road/Ripon Road) predicted to operate near to capacity.

9.54 As part of the assessment, improvements, including optimised signal times, were tested for the DPD scenario. The junctions are assessed using the ratio of flow to capacity (RFC), which shows the demand flow compared to the available capacity Although optimised signal timings improve the performance of Junction 5, this junction is still predicted to operate close to capacity. However, improvements were not predicted to significantly affect the performance of Junction 3 or 4, although improvements were predicted to allow Junction 9 to operate below a ratio of flow to capacity (RFC) of 0.85.

9.55 In addition, as part of the 2012 LSTF bid, several improvements to the highway network have been completed or are planned for 2014/2015. Completed improvements include the A661/Railway Road – alterations to this junction were implemented during September 2013. The changes have improved traffic flows and reduced congestion.

9.56 Further improvements to junctions on the A661 corridor involving both physical changes to the road layout and/or changes to the traffic signal timings (software) are planned in 2014/15 including:

- Claro Road/Skipton Road – the existing traffic signal controlled junction is being modified to enable safe crossing facilities for both pedestrians and cyclists. The proposals include a change in the traffic control strategy with the aim of reducing congestion. This scheme is also being designed to cater for future housing development on Claro Road. Works are currently planned for Spring 2015.

Summary and Conclusions

9.57 Key facilities within Harrogate Town Centre, including the train station, bus station, the conference centre and shopping areas, are within reasonable walking distance of each other. However, discussions with North Yorkshire County Council indicated that pedestrian links to and from both the rail and bus stations are currently unattractive and poorly signed, which is a key barrier to movement within the town centre. The implementation of the new Wayfinding Strategy should help to encourage walking within the town centre.

9.58 There are several on-road cycle routes that pass through the town centre (generally converging at the rail station), which provide good access to surrounding areas. There has also been recent investment in cycle parking facilities within the town centre. However, cycle infrastructure in some areas of the town centre is in need of maintenance and is inconvenient for cyclists.

9.59 In terms of on-street parking facilities in the town centre, the maximum stay period is 3 hours. Although no occupancy data was available, discussions with Harrogate Borough Council indicated that these spaces are generally full during the daytime. In addition to these pay and display spaces, free disc parking is also available for disabled drivers and residents. Again, no occupancy data was available but the discussions with the Council indicated that there is sufficient disc parking space on the periphery of the town centre. On our visits to Harrogate, PBA observed very high levels of on-street parking across the town centre which, in many cases, was visually intrusive and acted as a barrier to walking and cycling.

9.60 With regard to off-street parking, occupancy data showed that in general the car parks are well-used, with supply meeting demand for most of the year with the exception of around 15/20 days a year, especially weekends before Christmas. However, the three largest multi-storey car parks are often significantly below capacity and could potentially accommodate additional demand associated with any reduction in on-street parking.

9.61 According to the business and visitor surveys undertaken for the HTCSM, approximately one third of businesses who responded indicated that more car parking would support the growth of their business, with approximately two-thirds of respondents stating that improvements to town centre parking should be a priority. However, the responses from the visitor survey accorded more with the Council's view of parking in the town centre, with only 8 per cent of respondents stating that they disliked 'difficult' or 'expensive' car parking within the town centre, and only 10 per cent and 1 per cent of respondents stating that the town centre could be improved by 'more/better parking' and 'cheaper' parking, respectively.

9.62 Our review of Harrogate's public transport facilities and services has indicated that the town centre is served by frequent bus services throughout the week and Saturday, with bus corridors identified along the A61 and the A59. However, Sunday services to the town centre are far less frequent, which results in several areas of Harrogate having access to a bus service of a frequency of one per hour or less. Discussions with North Yorkshire County Council indicate that the punctuality and reliability of bus services is reasonable, with no public-transport specific congestion issues noted. Relatively regular rail services are available to Leeds, York and Knaresborough throughout the week. In addition, as stated above, discussions with the County Council indicated that pedestrian access to the bus and rail stations is unattractive and is a critical issue.

9.63 Finally, a review of modelling work undertaken by the Borough Council and discussions with the County Council indicates that there are several locations within Harrogate that suffer from congestion issues. Key locations identified by the Borough Council include the Skipton Road/A59 and Bond End junction. In addition, modelling work indicates that several junctions within or in the vicinity of the town centre are currently operating above or near capacity, including the Parliament Street/Ripon Road/King's Road traffic signals, Parliament Street/Ripon Road/King's Road traffic signals and the Prince of Wales Roundabout. The modelling predicts that these junctions will continue to operate near or above capacity.

Table 9.7 Harrogate Town Centre Transport SWOT

Strengths	Weaknesses
- Most town centre facilities within a reasonable (5-10 min) walking distance. - There are a number of existing strategic cycle routes into the town centre. - Good bus services from a number of destinations into the town centre. - New wayfinding scheme (and app) will make the town centre much easier to navigate and will encourage more walking.	- Very variable cycle infrastructure quality. - Some pedestrian linkages within the town centre are of poor quality and are dominated by traffic and/or parked cars. - Dominance of on-street parking within the town centre has a negative impact on the street scene and on pedestrian and cycling provision and movement. - Poor pedestrian linkages to the rail and bus stations. - Busy traffic on many key roads within the town centre. - Congestion at key junctions in the town centre. - Gaps in bus provision to areas immediately to the east and west of the town centre.
Opportunities	**Threats**
- LSTF delivery will improve walking and cycling infrastructure. - Planned Urban Traffic Control Centre will help to improve congestion and bus reliability within the town centre. - Significant spare capacity in several of the large town centre car parks (Victoria, Jubilee, West Park and Dragon Road) which could allow some town centre on-street parking to be removed. - There is significant opportunity to encourage further travel behaviour change through promotion of walking, cycling and public transport use (with local residents and visitors), which would help to tackle congestion in the town centre.	- Future resources for funding sustainable transport improvements are uncertain which may undermine the town centre's ability to improve transport. - Improvements to rail and bus station may be dependent on a wider development scheme coming forward, which is a significant risk to delivery.

9.64 The findings of our baseline work, summarised above, indicate that the town centre has good sustainable transport links which present opportunities to encourage sustainable travel.

9.65 However, there are a number of weaknesses in the existing infrastructure. The quality of cycling infrastructure has been identified as poor in some areas, and pedestrian links between the rail station and bus station, and key transport interchanges, were identified as being unattractive. There are therefore opportunities to encourage sustainable transport usage through the improvement of these links.

9.66 With regards to parking, although pay and display is considered to be generally full during the day, there is considered to be sufficient free disc-parking on the periphery of the town centre. Furthermore, supply generally meets demands for off-street car parking within the town centre. This indicates that parking is not a major issue within the town centre, which is reinforced by responses from the HTSCM visitor survey. Finally, congestion at key junctions within the town centre may be exacerbated by future town centre development. Focussing on encouraging sustainable transport, as set out above, may help to reduce the impacts of this congestion.

10 SUMMARY OF FINDINGS

Introduction

10.1 Peter Brett Associates LLP has been commissioned by Harrogate Borough Council to prepare the Harrogate Town Centre Strategy and Masterplan (HTCSM) on its behalf. The main objective of this work is to provide a comprehensive assessment of the strengths and weaknesses of the town centre and to develop a vision and physical masterplan, including deliverable area-based projects and proposals. The Borough Council intends to adopt the HTCSM as a Supplementary Planning Document.

10.2 The purpose of this Baseline Report has been to provide an evidence base that will allow us to set out a coherent vision for the town centre and practicable objectives for achieving that vision as the next stage of our work. We have reported the results of a number of inter-related lines of enquiry concerning the current composition and performance of the town centre, its physical environment and infrastructure, and the local property market. In this final section we present a summary of our findings.

The Policy Context

10.3 In Section 2 of this report we reviewed the existing policy context, considering both planning and economic policies at national, sub-regional and local levels. It will be important that the HTCSM supports and builds upon existing policy objectives.

10.4 We have noted that the National Planning Policy Framework requires local planning authorities to positively seek opportunities to encourage sustainable development that delivers economic, social and environmental benefits. The HTCSM should reflect the need to support sustainable development and act as a positive and proactive exercise in ensuring that the future development of Harrogate Town Centre delivers economic, social and environmental benefits to the local community. In accordance with paragraphs 153 and 173 of the NPPF the HTCSM should be aspirational but also realistic and deliverable.

10.5 Turning to local planning policy, the Harrogate Core Strategy emphasises the need to focus new development in the town of Harrogate, to deliver adequate services and infrastructure, and to support a robust and diverse local economy, with particular attention paid to tourism. The HTCSM should recognise and support the priorities for Harrogate Town Centre, for conference and business tourism, and for transport improvements that are set out by the Core Strategy.

10.6 Economic development strategies are provided both at sub-regional level by the Local Enterprise Partnership (LEP) and at district level by the Borough Council. The LEP's strategic plans are high-level but do contain a number of key initiatives that are relevant to the development of the HTCSM, including the need to focus on new markets and unlock growth opportunities, deliver environmental improvements and distinctive places, and reduce congestion in Harrogate.

10.7 The District's own economic development strategy is heavily focused on the development of the visitor economy and particularly business tourism which is seen to be supporting many other sectors of the local economy in Harrogate. It contains a range of specific measures which should, where possible and appropriate, be supported by the HTCSM.

The Current Performance of the Town Centre

Composition of the Town Centre

10.8 In Section 3 of this Baseline Report we provided an overview of the current composition of the town centre, as defined by the HTCSM study area. Retail uses dominate the town centre which has a large and diverse shopping area. Convenience retail provision is dominated by the Asda and Waitrose foodstores whilst large non-food stores are distributed across the central shopping area, helping to generate a balanced flow of shoppers around the town centre's commercial core. Retailers in the important clothing and footwear sub-sector are concentrated on James Street and Cambridge Street though such retailers can be found throughout the town centre demonstrating the health its retail offer.

10.9 Food and drink uses are concentrated to the northern and southern edges of the commercial core, although pubs and bars are clearly concentrated towards the western side of the town centre. Town centre visitor accommodation, which is mainly provided by large hotels, is concentrated to the north-west of the town centre in the vicinity of the Conference Centre.

10.10 Offices and professional services uses are located towards the south of the town centre in the vicinity of Victoria Avenue and there are attractive, well established residential areas to the north, east and south of the study area.

Performance of the Town Centre

10.11 Our analysis of the performance of the town centre was set out in Section 4 and has considered the scale and nature of trade within the town centre, the performance of the town centre in the national rankings and the findings of our surveys of town centre visitors and businesses. These indicators all paint a similar picture; that of Harrogate Town Centre performing well and being a vibrant and viable destination both for local residents and visitors from further afield. The town centre has a strong local catchment area which it dominates, especially for comparison goods shopping. The town centre's mix of national multiple and quality independent retailers is good and representation from premium comparison goods retailers is a particular strength.

10.12 Despite the economic downturn, Harrogate has managed to improve its standing in national retail rankings. The retail turnover of the town centre is estimated to be just under £300 million and existing floorspace trades well. The town centre has managed to attract a number of premium retailers in recent years that have congregated in the James Street area. The clothing and footwear sub-sector is particularly strong in Harrogate and this is a key determinant of the attractiveness of a town centre.

10.13 The overall market position of the town centre offer is upmarket, traditional and more focussed towards older consumers. Its offer is distinct from Leeds City Centre but similar to York City Centre, except that Harrogate's offer is less tourist orientated and appeals to slightly older people. This is reflected in the profile of the town centre's leisure visitors who tend to be older but who, on average, spend more on trips to Harrogate than the regional average.

10.14 Visitors to the town centre (including both locals and tourists) have strongly positive views of Harrogate and the main reasons for these positive views are the town centre's architecture and its overall environment. The range and quality of shops in the town centre also strongly influences positive views of the town centre. Where visitors do think improvements can be made, these relate to further expansion of the town centre's retail offer and improved accessibility, particularly additional car parking.

10.15 The vast majority of businesses based in the town centre, which are overwhelmingly small, well established businesses, are satisfied with their existing accommodation and few are seeking to relocate in the short term. The main reasons for this are satisfaction with their location and the size and layout of their premises. The main priorities of local businesses for improvement of the town centre are a reduction in traffic and congestion, and improvements to town centre car parking.

10.16 We have also considered key trends that have emerged in recent years and that are likely to impact on future development in town centres. These trends – including the growth of online retailing and the consolidation of national store portfolios – have largely had a negative effect on town centres, many of which have seen declining demand for retail floorspace, especially in smaller centres that serve less affluent catchment areas.

10.17 However, Harrogate Town Centre appears to have been remarkably resilient to the impacts of many of these changes, reflecting its overall strength not only as a shopping centre but also as a tourist destination. Both its key local and visitor markets are relatively affluent. Changes in the leisure and tourism markets also offer considerable opportunities for Harrogate. We have noted that one of the greatest threats to the vitality and viability of Harrogate Town Centre may be legislative changes associated with the relaxation of permitted development which could undermine any strategy to support the town centre's retail core, its professional services sector and the provision of serviced visitor accommodation within the town centre.

10.18 In summary, it is therefore apparent that the town centre is performing well and has many existing strengths. These include its architecture and green spaces, the affluence and loyalty of its catchment area, and its visitor appeal. Preserving and building upon these strengths, whilst organically and intelligently diversifying the offer of the town centre and managing its success, will be a key priority for the development of the HTCSM.

Town Centre Assets

10.19 The preceding section has given a good overview of the strong performance of the town centre and its key strengths. Sections 6 to 9 of the Baseline Report have provided a more in-depth analysis of various aspects of the town centre that will be critical to the future performance of the town centre and the development of the HTCSM. The key assets of the town centre can be summarised as follows;

- the attractive and well preserved nature of the town centre's distinctive architecture;
- its large and well maintained green spaces and floral displays that provide the town centre with a unique setting;
- the strength and diversity of its retail offer, especially in terms of independent and premium retailers;
- the conference centre and business tourism that makes a significant contribution to the local economy;
- the good levels of car parking within the town centre and the location of the railway and bus stations immediately adjacent to the main shopping area; and
- the low vacancy rate and relatively small number of derelict or underutilised sites requiring redevelopment.

Areas for Improvement

10.20 The aforementioned strengths provide a number of opportunities to further enhance the performance of the town centre and to deliver additional economic benefits. These include:

- the redevelopment of the transport hub on Station Parade to greatly enhance this gateway to the town centre and provide new and improved public transport facilities;
- opportunities to build on business tourism to offer additional visitor attractions, possibly around a Spa theme, in order to attract a greater number of staying visitors;
- significant improvements to the public realm to reduce the dominance of traffic and to improve the town centre environment. This will support the movement of pedestrians within the town centre and create new spaces for markets and events that will further enhance the appeal of Harrogate to shoppers and tourists; and
- opportunities to improve the leisure offer of the town centre and particularly the food and drink offer, allied to public realm improvements.

Next Steps

10.21 The next steps in the development of the HTCSM are as follows:

- our analysis of town centre opportunities and constraints will inform a consideration of strategic options and the development of a vision for the town centre. This will underpin the HTCSM and set out the overarching economic, social and environmental objectives for the future development of the town centre;
- based on the vision and assessment of strategic scenarios, draft options for the town centre strategy and a long list of potential masterplan projects will be developed. These options and potential projects will be discussed with the Borough Council, key stakeholders and other interested parties;
- the strategy and masterplan documents will be preprared to set out a spatial framework plan and describe how the masterplan projects will help to deliver stated policy and strategic objectives. This will include an implementation plan describing how the HTCSM will be delivered; and
- the Borough Council will put the draft strategy and masterplan to public consultation, prior to it being adopted by the Council as a Supplementary Planning Document to deliver town centre improvements, attract investment and inform development management decision