

MILLER



Research Evaluation Consulting



Survey Report – Barnard Castle Market Towns Retail Distinctiveness Project

REPORT TO:

One North East Regional Development Agency

October 2006

Report Prepared by:



In partnership with



Contents

1	Introduction.....	4
2	Barnard Castle Town Centre – Overview.....	5
3	Survey Activities.....	7
4	Vitality and Viability Results	8
	Types of shops and services	8
	Occupier Profile.....	13
	Diversity of use.....	14
	Pedestrian footfall	15
	Vacancy rates	15
	Rental levels.....	16
	Retailer confidence surveys.....	16
	Consumer confidence	16
	Transport and Parking.....	17
	Accessibility.....	19
	Conclusions.....	20
5	Retail Distinctiveness Results	22
	Physical/Aesthetical Survey	23
	Visual Retail Survey.....	33
	Markets	41
	Customer Care.....	44
	Views from Local Businesses	46
6	Key Findings.....	52
	Level of Retail Distinctiveness	52
	SWOT Analysis	56
	Key Findings	57
	Next Steps.....	60

1 Introduction

The purpose of this report is to present our survey findings, specifically in relation to retail distinctiveness in the market town of Barnard Castle. Our survey approach and methodology is outlined in a separate report, titled – “*Measuring Retail Distinctiveness – Approach and Methodology*”. This report should be read in conjunction with this document for supplementary information on how the surveys were conducted and analysis undertaken.

This report presents the results from the various surveys and identifies the level of retail distinctiveness present within the town centre.

2 Barnard Castle Town Centre – Overview

Barnard Castle is the main district shopping centre within the Teesdale area.

The town centre has a primary shopping area which comprises Horsemarket, Market Place, Nos. 1 & 3 The Bank and Star Yard. No primary or secondary frontage designation is made in the adopted local plan. Arrival to the town centre from the east (Darlington/Bishop Auckland) is through Galgate and through Newgate and The Bank when arriving from the south from the A66. The Bowes Museum, a key tourism attraction is located on the south eastern edge of the town centre and is accessed from Newgate.



The boundaries of main town centres are often determined by road junctions or key physical landmarks within the town. In Barnard Castle from the eastern approach the core town centre starts at the junction with King Street and Marshall Street, however some shops and guest houses are located prior to this, with the retailing along these stretches tending to be local in scale. From the southern approach, the butter market (Market Cross) building punctuates the street and creates the divide between the primary shopping area and secondary area into The Bank and Newgate.



The main shopping streets within the town centre are Horsemarket, Market Place and Star Yard within small extensions into Star Yard and The Bank, creating the primary shopping area. The remainder of the town centre, which we will define as secondary for the purposes of this survey, comprises of Galgate, Newgate and The Bank. The Morrisons car park has a small element of retail and services such as a café and it provides access into Maxwells DIY & Hardware. Parking in the town centre is accommodated by the Galgate car park, accessed off Galgate and a smaller car park to the eastern side of Market Place accessed through King Street, Queen Street and Birch Road. On street parking is available in Galgate, Horsemarket, Market Place, Newgate and The Bank through traffic regulation orders, specifically with a maximum stay

restriction. The main bus terminus in the town centre is within Galgate with additional stages throughout the town.

Keynote buildings with the town centre include Witham Hall, the Butter Market (Market Cross) and St Mary's Parish Church. The tourism information centre is located on Flatts Road at the bottom of Galgate, towards Scar Top and the Castle.

No hotels are situated within the town centre but there are serviced accommodation located on Galgate, The Bank and neighbouring residential roads.



3 Survey Activities

In relation to the specific survey work, the following activities were undertaken.

- Desk-top assessment of town centre (using GOAD plans)
- Physical and visual survey of the town centre between the 18th and 20th July 2006
- Transport and parking assessment conducted on the 1st August 2006 by Martin Stockley Associates
- Mystery shopper survey (11) between the 18th and 20th July 2006
- Face to face business interviews (15) conducted between the 18th and 20th July
- Interviews with market and farmers' market co-ordinators

4 Vitality and Viability Results

In response to our key findings in stage 6 of this project, we concluded that in order to achieve retail distinctiveness in market towns, it was important to achieve the right balance in relation to range and choice for both local people and visitors. The existence of national retailers in market towns was therefore not identified as a threat but an opportunity if the right scale and level of complementarity is achieved. The survey stage has therefore responded to this and the general health of Barnard Castle's retail offer, its vitality and viability has been assessed so that we can understand its general condition, before measuring its distinctiveness in relation to the mix of independent shops, food and drink and other attractors.

The following results have been obtained from surveys undertaken between the 18th and 20th July 2006.

Types of shops and services

A total of 225 units represent Barnard Castle's town centre, which in addition to the primary shopping area includes shops and premises within the secondary areas. Of these, 90 are shops (A1 use class), 21 are financial and professional services (A2 use class) and 28 are either restaurants or cafes, drinking establishments or hot food takeaways (A3, A4 and A5 use classes respectively).

All of the national retailers are located within the primary shopping area on the eastern side of **Horsemarket** and **Market Place** with some additional stores such as Woolworths, Savers and a number of banks such as Nat West on the western side of Market Place. Most of these premises have rear servicing and have an excellent visibility to the customer as well as being close to on-street short stay parking. Pavement frontages are generally good especially on the eastern side of Market Place, with the immediate carriageway used for the weekly market on Wednesday. The main food store is Morrisons with vehicular access off Galgate, and the Co-op Supermarket and both stores have car parking provision, although not in their ownership. The dominance of national retailers tends to lessen as one moves outwards towards Galgate and towards the Butter Market (Market Cross). Within the primary shopping areas there is a good representation of local traders, predominantly occupying single frontage premises. This is evident towards the lower end of Market Place with a number of eating establishments, a women's boutique and a local bookshop. The Horse Market is also a focus for local independent traders with Boyes Department store being a key attractor, as well as a



butcher, farm shop, bric-a-brac, bakers and delicatessen / fruit and vegetables shop. The under-used Witham Hall sits at a strategic position within Horse Market and Market Place providing a key focus within the street-scene and opportunities for anchoring complimentary uses to the town centre.



Galgate is well provided for in terms of short stay and disabled parking provision within the centre of the street and alongside the shops. The area is a mixture of smaller units catering for cafes, hot food takeaways, the local post office, florists, public houses and shops selling outdoor wear, sports goods as well as betting offices and travel agents. A number of offices and financial services are located within this area as well. A recent investment in Galgate is McKays at No.29, which may stimulate further investment in the street and the attraction of other good quality comparison type outlets.

The Bank, is a street that has a different offer to the rest of the town centre as it is separated from the town by the Butter Market (Market Cross), creating a different space and experience as it slopes down to the River Tees. This creates a natural line between the primary shopping area and the peripheral secondary shopping area. The transition however, is announced well before the junction at the Butter Market (Market Cross) as you approach from the north, with Nos 2-10 having a diverse, quality offer including a Furnishing and Interior Decorator, Café, Restaurant and Domestic Appliance shop. Accessing the western side of



The Bank from Market Place is easier than crossing to the eastern side of The Bank, due to the location of the Butter Market (Market Cross), with the pedestrian route being convoluted and not direct. A number of antique shops, restaurants, specialist shops and public houses are located within the street, as well as a guest house.

Newgate provides a critical link with the Bowes Museum, yet only has a small representation of attractors along its frontage. The recently opened art gallery and the Black Lion Public House are set further along the road with St Mary's Parish Church and Hall on the opposite side.

A breakdown of land use and representation of national retailers within Barnard Castle town centre is shown in the tables below:

Use	Primary	Secondary
Shops (A1)	48	42
Fin & Prof Services (A2)	14	7
Restaurants and Cafes (A3)	8	7
Drinking Est.(A4)	3	4
Hot Food Take-Away (A5)	1	5
Business (B1)	1	9
Hotels (C1)	1	3
Res Institutions (C2)	1	0
Dwellings (C3)	0	39
Non Res Institutions (D1)	1	6
Sui generis (garages)	0	2
Total	78	124

Table 1 - Barnard Castle Town Centre - Retail, Services and Other Use

National Retailer Presence	
Bakers Oven	Finlays
Barclays Bank	HSBC
Blockbuster	Johnsons
Boots	Mackays
Britannia Building Society	Morrisons Supermarket
Clinton Cards	Natwest
Co-op Welcome	Savers
Corals	Stead & Simpson
CTN	Travel Care
Done Bookmakers	Victoria Wine
Edinburgh Woollen Mill	Woolworths

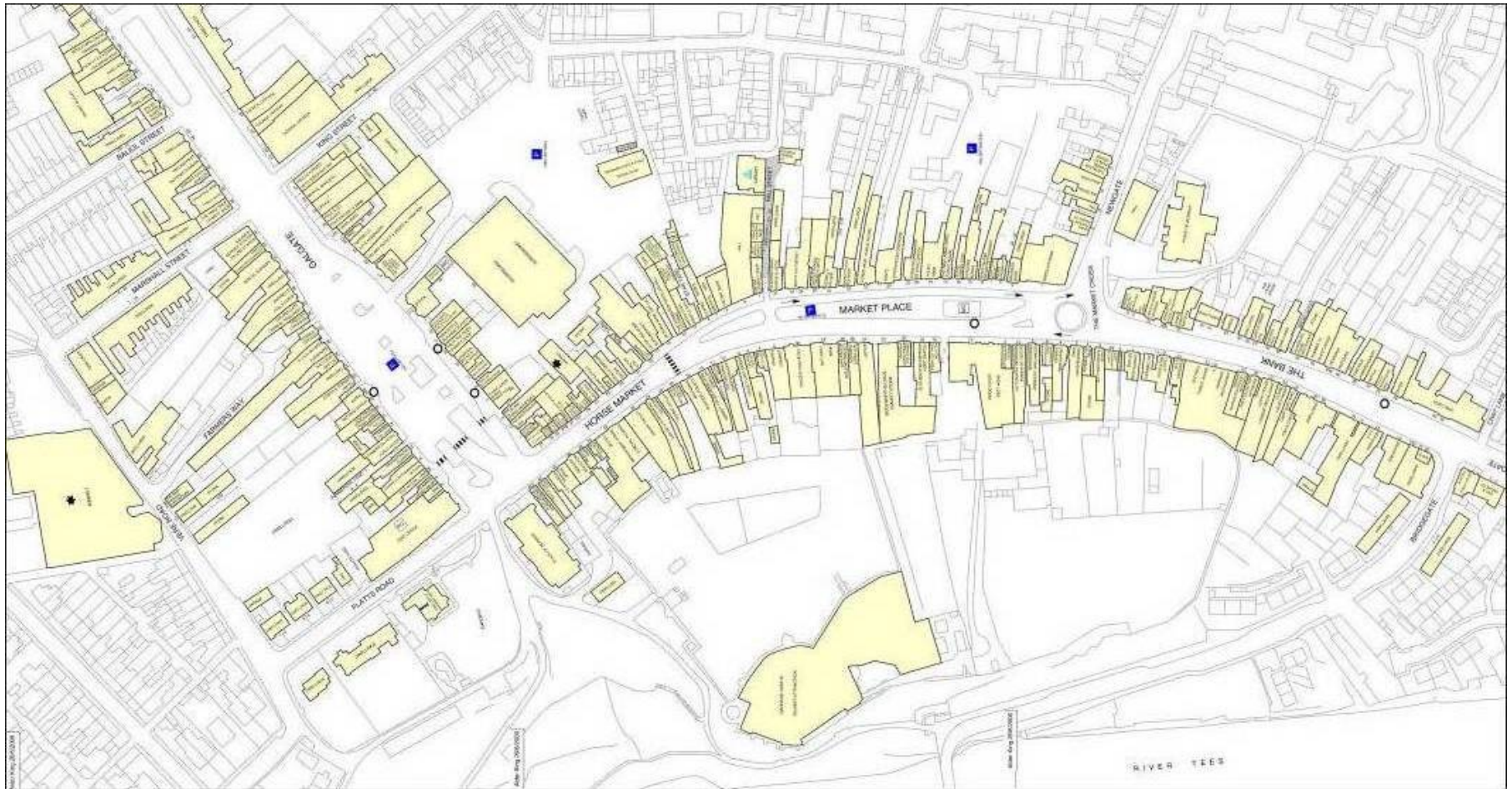
Table 2 - National Retailers Present in Barnard Castle - June 2006

In summary, Barnard Castle has a number of anchor national retailers such as Morrisons, Woolworths and the big banks within its town centre. It has a reasonable clothing offer, although menswear seems to be under-provided for as well as young people's fashion. Boyes Department store provides a wide range

of good and products, but requires updating and needs to be made more easily accessible. Chemists / health products, bakers, butchers and footwear outlets are well represented in the town, although our market research has identified gaps including clothing, a need for an additional supermarket from local people, electrical goods and other non-food goods. Nevertheless, the recent investment from MacKays seems to show some renewed interest in the town and is plugging a significant gap in the town's retail offer.

In relation to food and drink, there are no national chain food stores within the town centre and only the public houses are owned by major breweries. Most of the public houses provide “bar snacks” and light lunches and there is a perception that most public houses are local establishments and do not have the right offer for visitors in the daytime and evening. There are several restaurants in the town centre that are popular and seem to have a loyal local clientele. Tea rooms and cafes are well provided across the town centre and cater well for the visitor in terms of range and choice.

Figure 1 - Barnard Castle Town Centre



Occupier Profile

Most of the national retailers trade within the primary shopping area. This area comprises Horse Market and Market Place (with Morrisons trading at 23 Galgate), the rear of 7-21 Galgate and Mackays alongside at No.29. The most dominant presence of national retailers is on the eastern side of Horse Market and Market Place. Given the large size of buildings and hence frontages, the locality has a critical mass of “High Street” names.

Figure 2 - National Representation

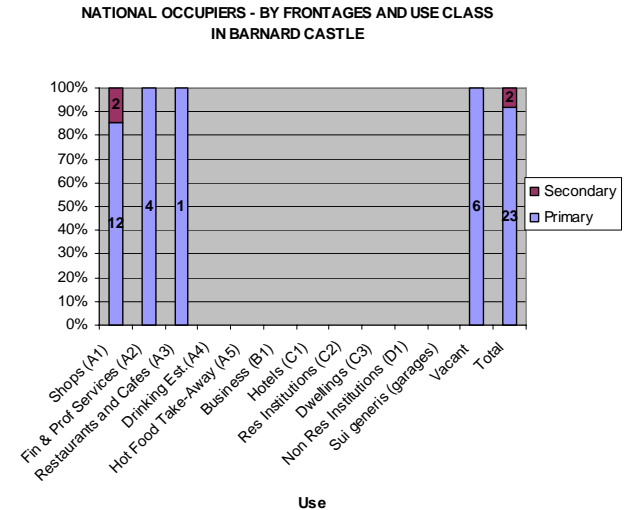
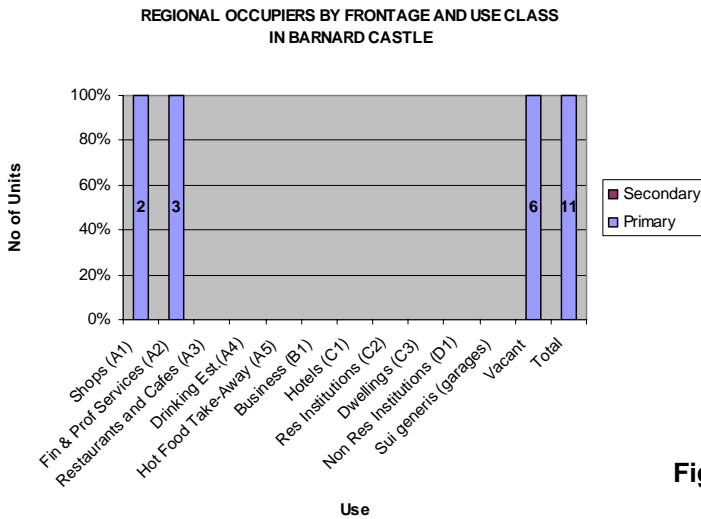


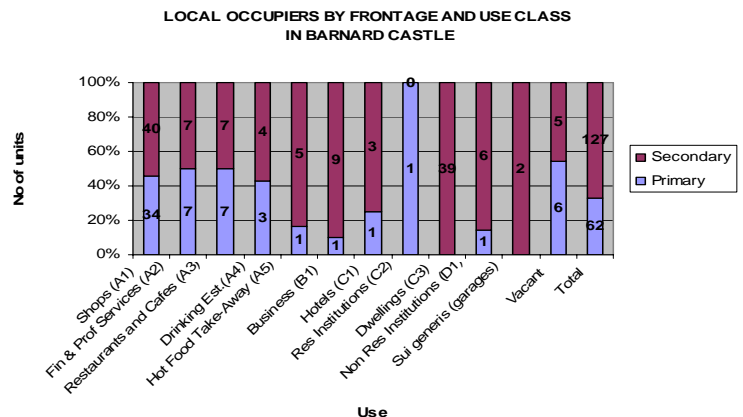
Figure 3 - Regional Representation



Regional occupiers tend to be predominantly financial services such as Darlington Building Society and local property agents. Local occupiers tend to populate those premises that are smaller in footprint and frontage and which generally sit either outside of the primary shopping area or in less attractive locations within the primary shopping area; normally where they meet the secondary areas. The Bank area is wholly comprised of local independent shops and

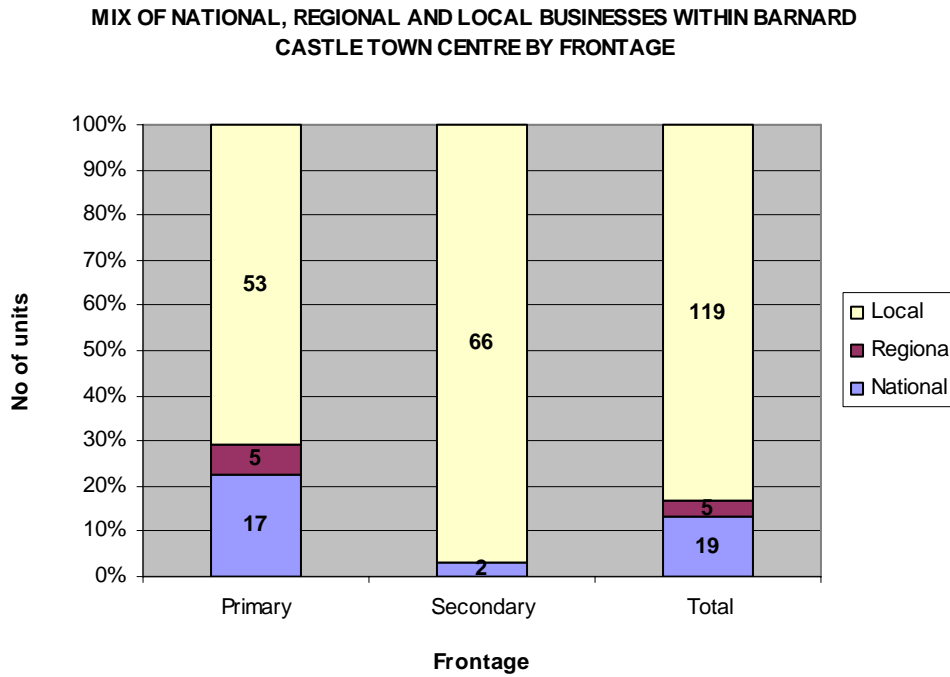
services which has organically created a specialist niche offer, although it is showing signs of under-performing and losing its identity. Galgate has a good environment that is an established basis for local traders in. The Bank and Newgate currently experience difficulties with parking and traffic

Figure 4 - Local Representation



and a lack of connectivity with the rest of the town centre.

Figure 5 - National/Regional/Local Retail Mix



Diversity of use

The town centre, in addition to its retail and associated services has the following neighbouring uses, which contributes to its overall diversity for local people and visitors. These include:

- Public houses
- A range of professional services (solicitors, estate agents, accountants)
- Tourist information centre, Council offices
- Hotel and Guest houses
- Dentists and health services
- Post Office
- Witham Hall
- Library

- Places of Worship and associated hall buildings
- Bowes Museum (located edge of town centre)

Pedestrian footfall

No pedestrian counts were taken at the time of the survey work, due to the scope of the project and resources. Nevertheless a visual assessment has identified the following characteristics.

The main car parking provision is towards the north eastern corner of the town centre within Galgate and the Morrisons supermarket car park. This is the origin for most pedestrian movement, in addition to shoppers flowing from on-street parking provision across the town centre. Key routes therefore include movement through Star Yard onto Horse Market and from Galgate, with shoppers splitting their journeys to continue along Horse Market and Market Place or using the controlled pedestrian crossing outside the Co-op Supermarket. Shoppers subsequently venture onto the west side of the primary shopping area with most shoppers stopping just beyond Woolworths.

The Butter Market (Market Cross) does create an end stop for some pedestrians who choose not to progress further whilst other more adventurous or inquisitive shoppers may venture on, possibly drawn by the glimpses of shops and restaurants that can be observed of The Bank through the colonnades of the Market Cross. The most direct way of accessing The Bank, from a distance, is through the west side of Market Place at the corner of Barclays Bank and the junction with Newgate. This can however be quite tortuous and difficult to navigate for first time visitors, due to lack of formal crossing points, pedestrian guard-rails and generally a poor pedestrian environment.

Controlled pedestrian crossing points are located in Galgate and Horse Market. At the time of the survey, the town appeared to have a good pedestrian flow across the primary shopping area between the hours of 10am and 2pm, although there was limited evening time street activity, with the exception of the Galgate area and those people visiting eating establishments within The Bank area.

Vacancy rates

At the time of the survey, Barnard Castle had a vacancy rate of 8% with 6 premises being vacant in the primary shopping area and 5 being vacant in a secondary position. Most vacancies are located in Horse Market, with the ex Yorkshire Bank being the dominant void, although this is now unfortunately being occupied by a bookmakers. Due to the poor pavement width and vehicle / pedestrian conflict towards the junction with Galgate, the upper end of Horse Market has 3 vacant premises. The Bank also has a

number of vacant premises. Whilst current vacancy rates are at the higher end of those experienced in many similar towns, it should be borne in mind that several of the properties are of the size and configuration that may prove difficult to let without substantive alternation and refurbishment work. There is also the significant issue of the lack of rear servicing for smaller shop units, especially towards the northern end of Horsemarket in addition to narrow pavement widths.

Rental levels

Current prime Zone A rents within the town are strong in comparison with other similarly sized market towns. There has been reasonable rental growth over recent years and there are reasonable prospects for growth in the future. However this is slightly dependent upon the success of landlords in attracting new lettings to vacant accommodation.

Primary	Rental value (per sq ft)
Horse Market	£45
Secondary	
Galgate	£25
In Town Office Rent (unmanaged)	£6 - £9

Retailer confidence surveys

As part of the Retail Distinctiveness project, Alder King, Property Consultants interviewed a number of national retailers to seek whether they had identified Barnard Castle town centre as a future investment. Of the 21 national retailers interviewed 4 expressed an interest in being located in Barnard Castle, subject to the right location, unit size and servicing requirements. National Retailers who do not identify Barnard Castle as a potential investment cited reasons such as the population being too small and not of the right economic profile. Interested retailers range from a fashion outlet to a bookshop and a chain of coffee houses. It may well be worth commenting that the 21 national retailers invited are typical of those retailers that trade in market towns. We could also comment that whilst the survey is not comprehensive (due to time and resource constraints) it is nonetheless a useful snapshot of the multiple retailer views on the town.

Consumer confidence

In relation to the needs of local shoppers, the Retail Distinctiveness project, with the assistance of MRUK Research met local people through focus groups held in the town centre. This session identified the following issues facing local people in relation to their satisfaction levels and confidence in the current retail offer.

Comments included:

- The number of empty shops on the high street which they consider ‘spoils’ the look of the town.
- General feeling that they can get most of what they need from the local shops and only have to go to Darlington or Richmond for larger items, or in the case of the younger population for clothes/music/entertainment.
- Lack of parking and particularly of free parking was high on the list of complaints. There is a free long stay car park in Barnard castle but it is often full.
- Lack of tea shops and good hotels.
- No cinema, theatre, dance halls and few children’s play facilities.
- Local people from Barnard Castle did not think there was sufficient activities and entertainment going on in the town to keep people in the town for long, unless visitors enjoy pottering around antique shops.
- They do have some specialist food shops in the town but did not consider there was anything available in Barnard Castle that you couldn’t get elsewhere, other than the furniture makers, which is well renowned.
- There was some criticism that many of the shops aimed their goods at tourists and the prices are high but most of the people prefer to buy from local shops and local people.
- There were some who would rather there was a bit more competition and a few more national retailers in the town. They were generally younger people, or people with young families.
- They are proud of the service in pubs and restaurants which they say is good and the service in local shops is also considered to be very friendly, with good personal service.

Transport and Parking

Barnard Castle displays a good degree of on street parking and traffic movement is generally fair, however off street parking could be improved. In this respect the town partially meets the needs of visitors and local users in terms of transport.

Barnard Castle is situated fairly high on the side of the banks of the River Tees. The Castle enjoys good views across the valley. As a result of this there are steep roads which run to the valley bottom. The through route over the river is blocked to heavy vehicles due to a weight limit imposed on the narrow stone built bridge. This effectively makes Barnard Castle a dead end to larger HGV traffic. This is deemed to be positive by many, but a significant amount of HGV traffic still enters along Newgate and negotiates a difficult roundabout junction upon which the Butter Market is situated. There have been several vehicle/building collisions as a consequence. HGVs then pass northbound along the town’s main streets.

HGV attraction is generated by the cattle market off Vere Road, businesses off Queen Street and deliveries to the supermarket and the rest of the town centre. These restrictions to HGV traffic ensure the vitality and lighter traffic in Barnard Castle.

Car users are well catered for by way of on street parking. This adds considerably to the vitality of passing trade and facilitates good access to the shops and retail experience. This is permitted on both sides of the Market Place, and both sides of Galgate. This parking is generally well used and many users significantly outlast the free time limit. Some business owners and workers tend to occupy these spaces all day. There are no parking wardens and therefore the system continues to be abused (new on street car parking regulations have been introduced since the survey). Pay and display parking is provided by the Galgate Car Park and additional long stay parking off Newgate road. The Galgate car park is well used by locals and visitors whilst the Newgate long term parking is used less by visitors as it is comparatively difficult to find. Opening up an entrance onto Newgate Road would greatly assist with access, identity and security. Better surfacing and lighting would also be beneficial.

Barnard Castle itself is hidden behind a frontage of shops and hotels, and is not easily recognisable from the town centre. The Castle does not have its own park facilities, which detracts from the viability of 'quick stop' visits, despite being a perceived main attraction.

Tourist information located opposite Barnard Castle provides a wealth of information about all facilities and traffic routes within Barnard Castle. It is believed that this helps to ensure that certain visitors seeking transport information are adequately catered for.

Public transport to Barnard Castle is considered good between Darlington, Bishop Auckland and Richmond. There is also a local small bus service around Barnard Castle which is considered important to the elder generation in part due to the hilly topography. There is a requirement for a trans-Pennine bus service to Penrith, which we understand was recently withdrawn. It is also understood that the Arriva evening service has been withdrawn from some areas and some routes. It has also been reported that a real time bus information system is to be introduced at the Galgate end of the town centre. There is no nearby train service available. The nearest is in Darlington. Commuter times are typically 25mins to Darlington.

Cycle routes are predominantly used by tourists and are not part of a local network but rather incorporate cycle tours between towns, using roadways.

Coaches with visitors generally park in the Galgate car park for free. Costs used to be £3 per stay, which have been subsidised by Teesdale Marketing by means of an annual contribution to Teesdale District Council. This is recognised by many as an asset but coach drivers would prefer to have a recognised set down bay, and retreat to an out of town parking area. There is however a coach set down bay, alongside the Tourist Information centre, but this is only available on market days, which is when it is most required, although this is not known to many drivers who have not contacted the tourist information centre.

There is no resident parking schemes in operation, but some residents living close to the Galgate car park find that parking is often used outside their properties rather than at the pay and display car parks.

Market stall holders generally consider that parking is insufficient on market days, as most of the cobbled areas along side Market Street are used by market itself. Most customers are considered to be locals and are affected by parking charges, which can often equate to the value of the goods they are buying. Despite this the stall holders do have the luxury of having vehicles at the rear of the stalls, and this prevents the additional traffic when setting up and packing up to and from another parking location.

It should be noted that there is only one traffic controlled crossing, which is good for through vehicle traffic as queues are avoided. Pedestrians generally cross the roads where they want, which is good for retail access, but this trend relies on a low volume of traffic for safety. Further consideration should be given to disabled users, whom cannot cross with the same ease and freedom.

Accessibility

Linkages between the Galgate car park and the long stay car park is generally direct, but poorly signed and has a back street appearance, however access is possible for disabled users and also fairly direct to the market stall areas. Access from the long stay car park to Barnard Castle is some distance and would not be enticing for this purpose.

Generally pavements are wide and movement of pedestrians is good. As mentioned previously roads leading down to Horsemarket and Market Place are relatively steep, and probably precludes disabled access along this road. However this does provide a natural resistance to growth of the town in this direction.

The position of the main bus stops is generally good and gives good access to both Barnard Castle and the Market areas. The bus stops are so arranged as not to affect the through flow of traffic, which enhances the attractiveness of the town as long queuing is avoided.

Stall holders state that access is difficult for disabled users to and from their stalls, as they are often required to negotiate double height kerbs as well as the cobbled streetscape. This is local to the east side of Market Street and can easily be corrected with effective use of drop kerbs or ramps.

Access from the coach park in Galgate car park to the attractions is a significant distance for the elderly, although the terrain is reasonably level in the main.

Bowes museum has its own car parking and therefore is almost a self contained unit when considering the effects of parking. It is understood that they lend their parking facilities when large events are being held.

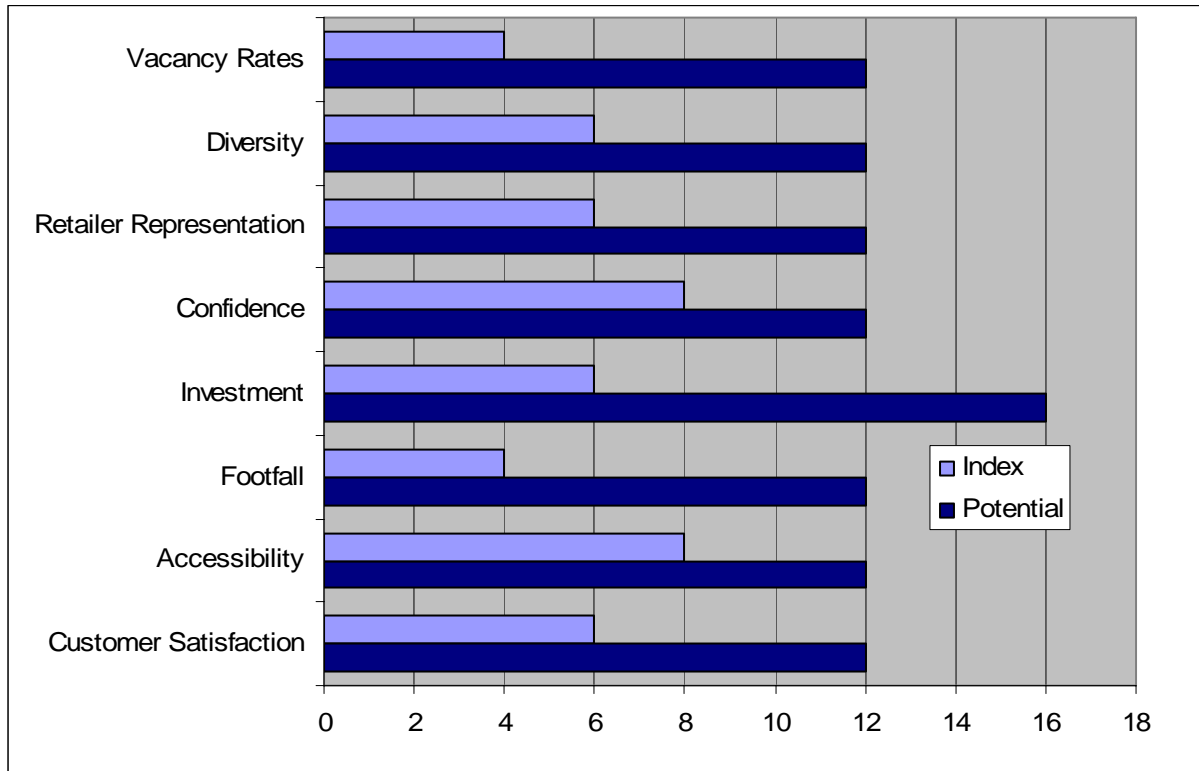
Conclusions

Our assessment of Barnard Castle's retail vitality and viability has identified the following key themes:

- 8% vacancy rates within the town centre, which is comparable to most market towns of this size, but notable vacancies in primary locations within Horse Market and Market Place. The Bank is also experiencing a number of voids within its specialist antiques shops.
- A reasonable level of diversity across the town centre with a number of complimentary uses such as the Parish Hall, Witham Hall (future usage), Tourist Information Centre, etc as well as health and professional services located within the town centre.
- A reasonable representation across national and local retailers in some goods and services, although some significant gaps in terms of comparison and bulky goods and other specialist products.
- Due to its isolated location and poor market strength, Barnard Castle is presently not identified as a key investment location for national retailers compared to other neighbouring towns in the North East.
- Footfall is centered along Horsemarket and Market Place with Galgate and the Market Cross acting as end stops to the retail area. The main Galgate car park is the key feeder for pedestrian routes into Horse Market and onto the rest of the town centre. Evening time offer is focussed in some areas of the town, with the town generally not having a diverse food and drink offer.
- Accessibility is generally good for the topography of the town, although access to and from the Galgate car park could be improved, with signage and clarity of routes need addressing.
- Local shoppers identify the neighbouring towns of Darlington and Bishop Auckland as key centres that have a better range of shops and services. Specific items include men's clothing, footwear,

bulky goods, electrical and other specialist as well as evening time activities such as a cinema and ten-pin bowling.

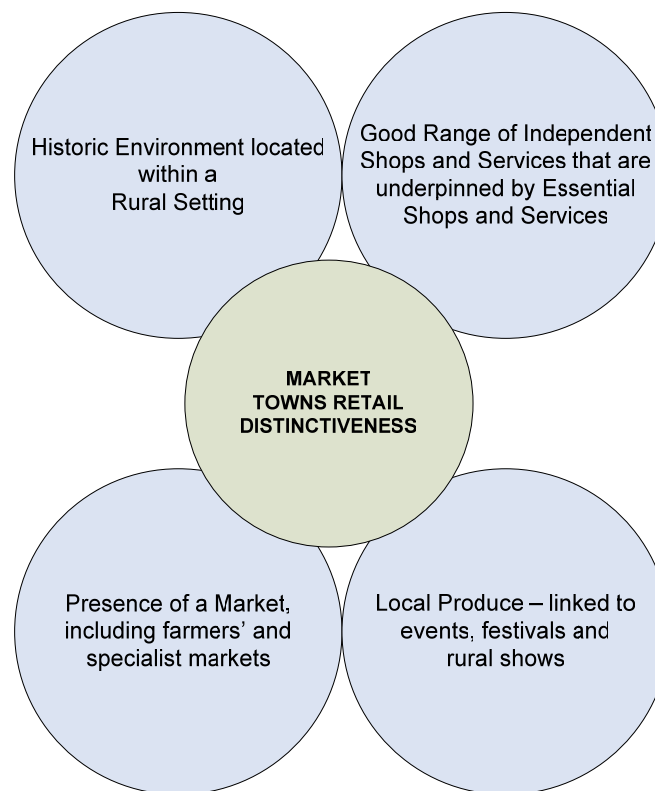
Figure 6 - Vitality and Viability Index - Barnard Castle



5 Retail Distinctiveness Results

The main focus of this project has been to define what makes market towns distinctive in relation to their retail and services. The basic conditions for a market town like Barnard Castle to function have been identified in section 4 to this report – Vitality and Viability. This section presents our assessment of retail distinctiveness, which is in response to the project's key findings, as shown in the figure below:

Figure 7- Key Findings - Retail Distinctiveness



The following types of survey have therefore been undertaken with the results shown overleaf:

- **Physical/Aesthetical**
- **Visual Retail Survey**
- **Markets**
- **Customer Care**
- **Views from Local Businesses**

Physical/Aesthetical Survey

To develop an assessment methodology that can be transferable to other towns, we have defined a series of scoreable key performance indicators, by examining and distilling the factors that most impinge on peoples perceptions of a place. A useful guide in this process has been the results of the MRUK survey, which provides some ranking of issues which attract visitors to market towns. Other source references have been:

- Town Centre and Viability: A review of the Health Check Methodology - February 2006.
- Countryside Council for Wales: Landmap Methodology.
- English Partnerships: Urban Design Compendium 2000.
- The Countryside Agency: Landscape Character Assessment Guidance for England and Scotland 2002.

A field survey was carried out to record information during a walking survey of the town. It starts at the larger scale and works downwards:

- **Town context and countryside setting**
- **Townscape of retail core**
- **Streetscape**
- **Street Elements**

This is purely a visual survey defined by those elements that influence character to produce a detailed description of the physical elements of the study area, including description of the wider countryside context, context within the town, and of the retail centre.

A retail core character appraisal summary was produced in bullet point form, to define the key characteristics that influence the distinctiveness of each town.

This is illustrated by a town plan showing key elements in the Character Appraisal. A further plan defines distinct character zones within the town, with descriptive text for each. A SWOT analysis of the town identifies strengths, weaknesses, opportunities and strengths of the town character.

Having established this baseline of how the character is defined, elements of the streetscape were assessed and rated numerically to provide a measure of their influence on the town's distinctiveness.

An important element of the survey was assessing individual shop fronts.

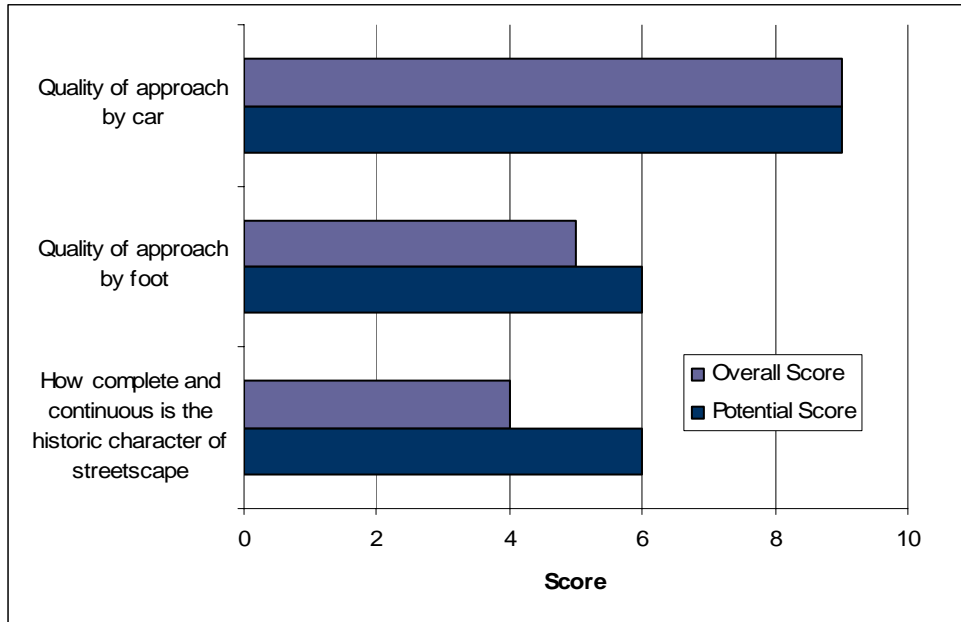
Shop fronts that contribute significantly to street frontage character in Barnard Castle show a more continuous spread throughout the retail core, with significant clustering on the north side of Market Place and south of Market Cross. This is generally reflected by the plan showing contributions of shop window displays to street character. Together these plans indicate that there is a fairly consistent street-scape character in the town, but is interrupted by vacant properties or poor examples.

Main Townscape Characteristics

- Street frontage development with clear building lines, historic plot widths, consistent scale and predominantly unbroken rooflines. Minor side roads and alleyways, often through archways under 1st floor, providing links to small shops, car parks and residential areas.
- Traditional shop fronts still retained or restored in majority of town
- 2 and 3 storey development, with upper storeys often used for residential apartments. Upper storeys and roof scapes display historical features in original stone materials.
- Variations in shop types and activity between different areas adds interest to retail core.
- Landmark features of Methodist Church, Market Cross and St Mary's Church.
- Some distinctive buildings and coherent groups of high visual interest.
- Recent paving through town in character with surroundings, and good quality materials used.
- Victorian style street furniture and lighting is a consistent and appropriate feature.
- Street and road signage is generally controlled and consistent with historic setting.
- Predominantly unspoilt shop façades, or good restorations, and generally shop signage is appropriate. Few illuminated signs, box signs, and no neon signs. Security shutters also absent.
- Few signs of graffiti or vandalism, even in areas not overlooked.
- The three main character zones of Galgate, Market Place and The Bank contribute to the overall interest of the town, forming a sequence of different character types.

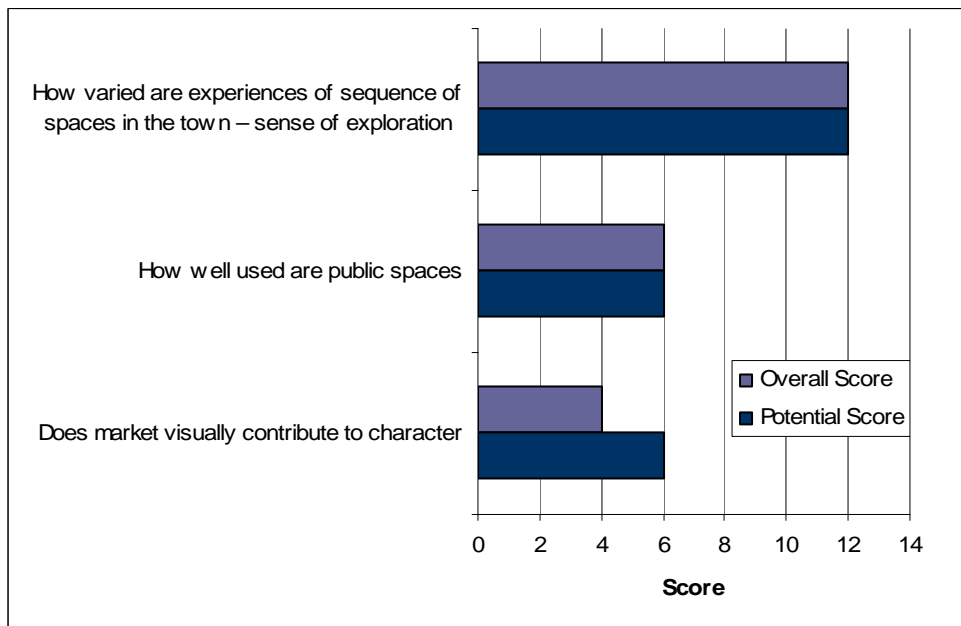
It should be acknowledged that the quality of the physical environment has been due to a programme of activity lead by Teesdale District Council and Teesdale Council including a shop front improvement scheme, historic centre re-paving programme, new gateway feature in Galgate, the Galgate/Scar Top/Castle townscape improvements and business grants to retailers from the District Council, amongst other initiatives.

Town Context



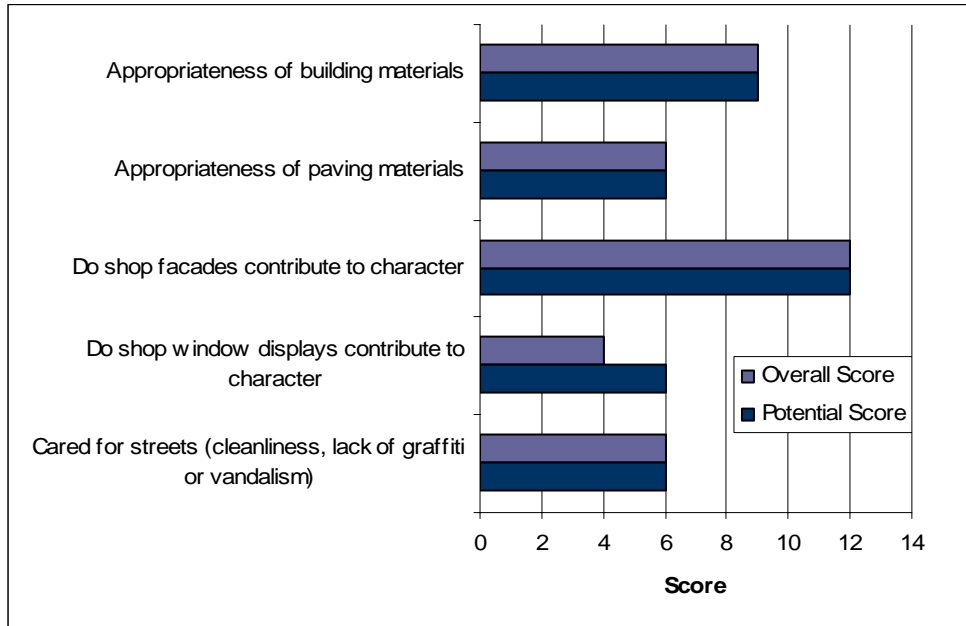
Source: Macgregor Smith – Physical/Aesthetical Survey

Townscape



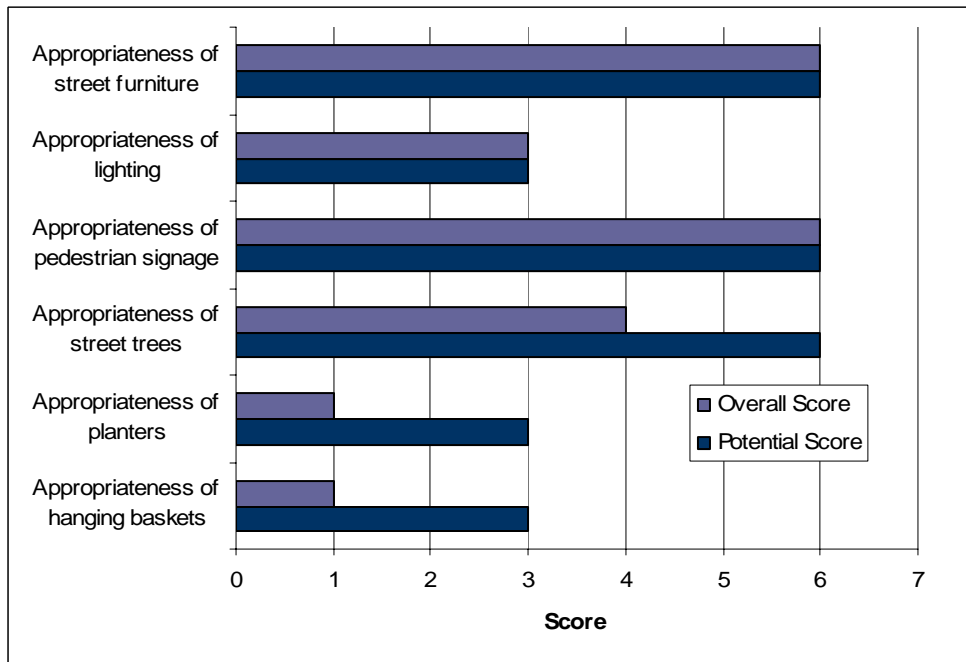
Source: Macgregor Smith – Physical/Aesthetical Survey

Streetscape



Source: Macgregor Smith – Physical/Aesthetical Survey

Street Elements



Source: Macgregor Smith – Physical/Aesthetical Survey

Figure 8 - Town Centre Core Character Appraisal

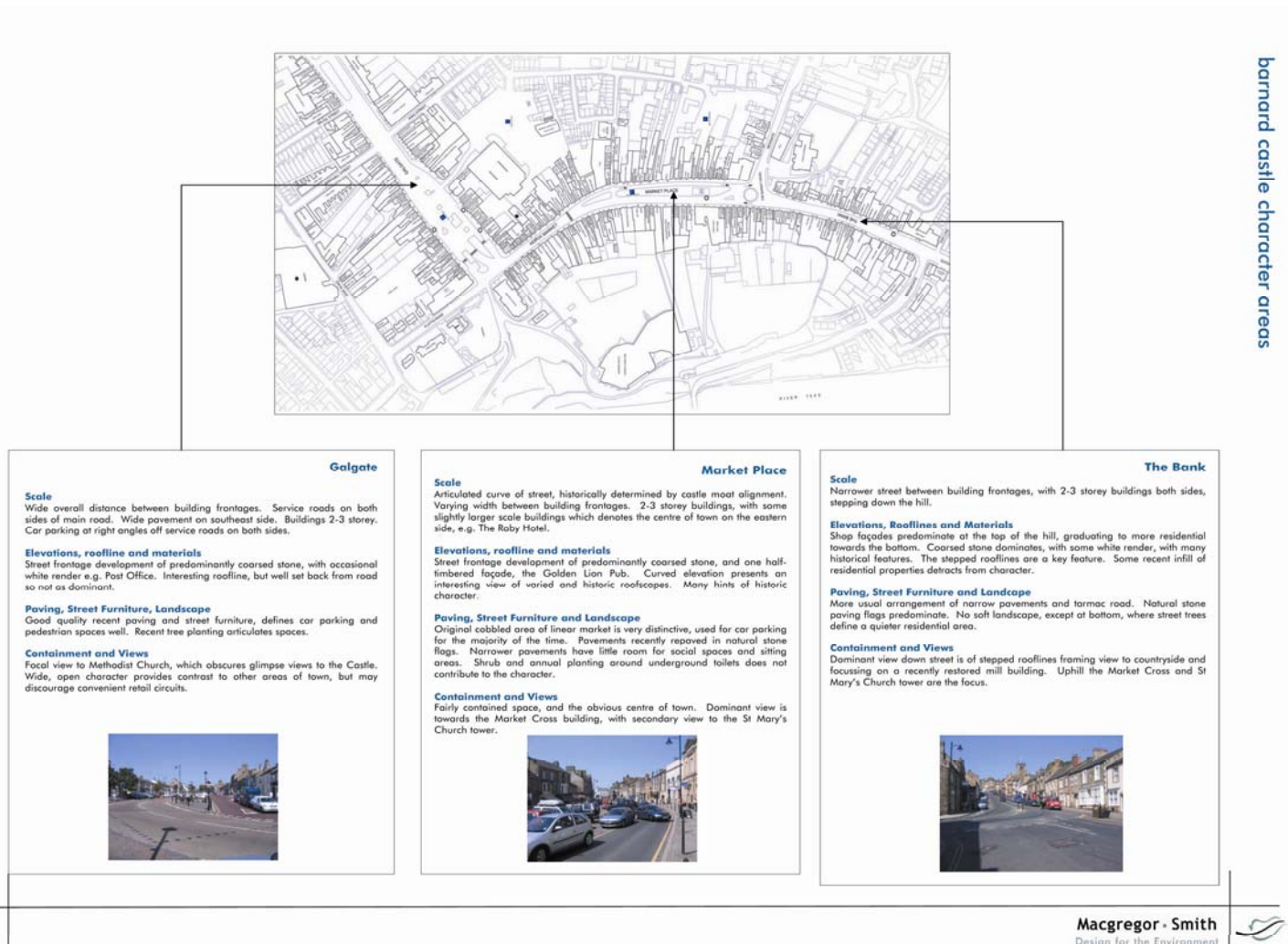


Figure 9 - Shop Front Facades

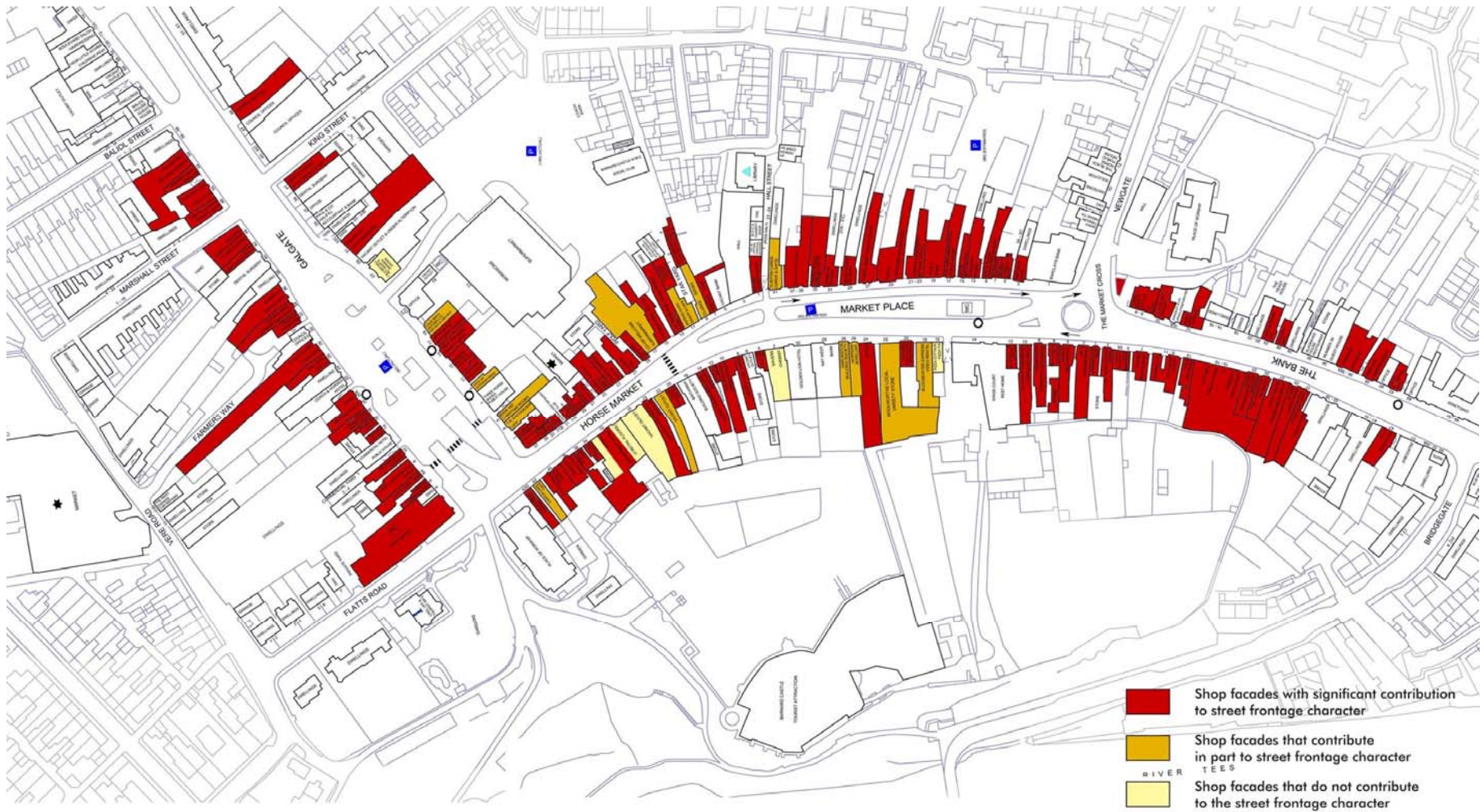
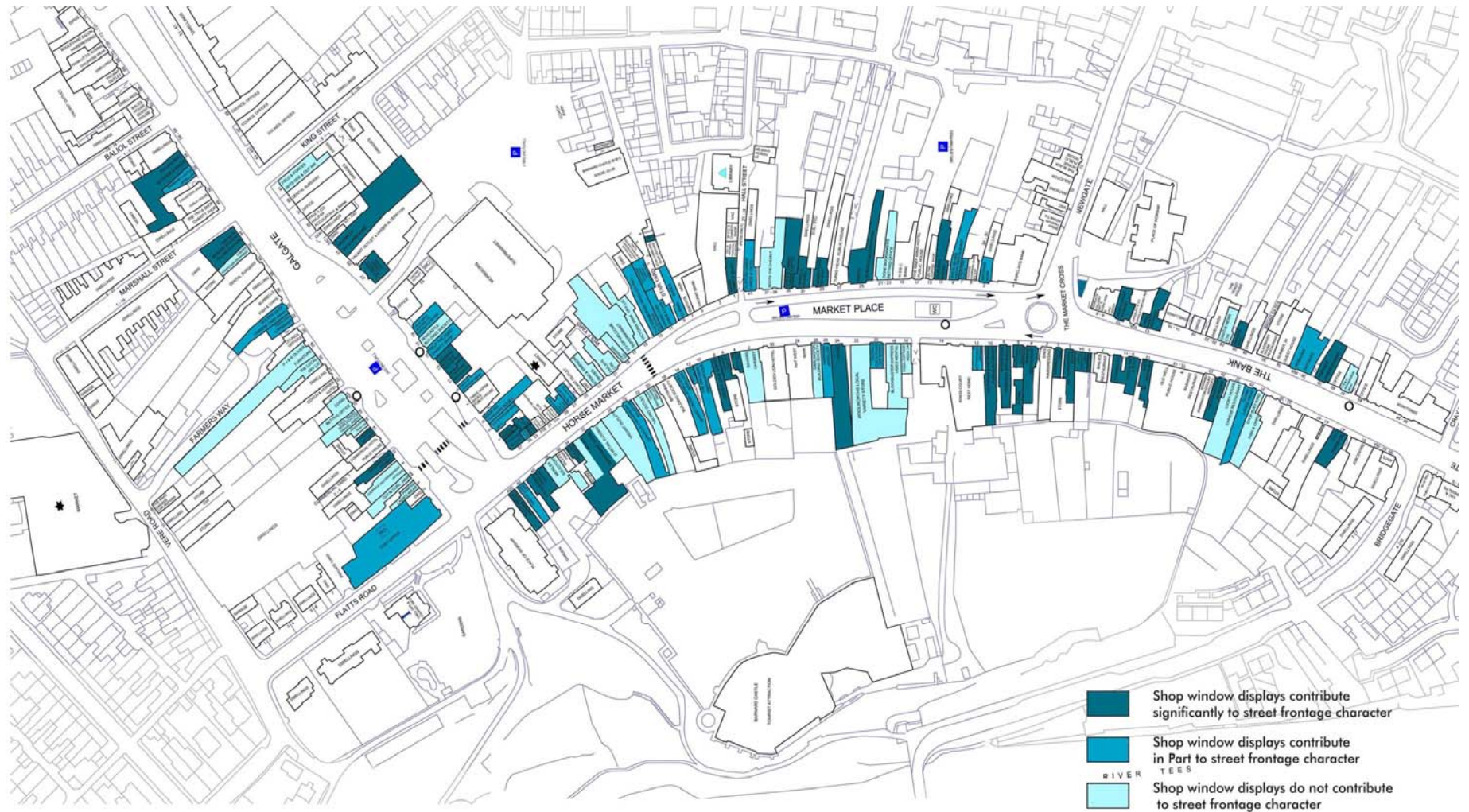
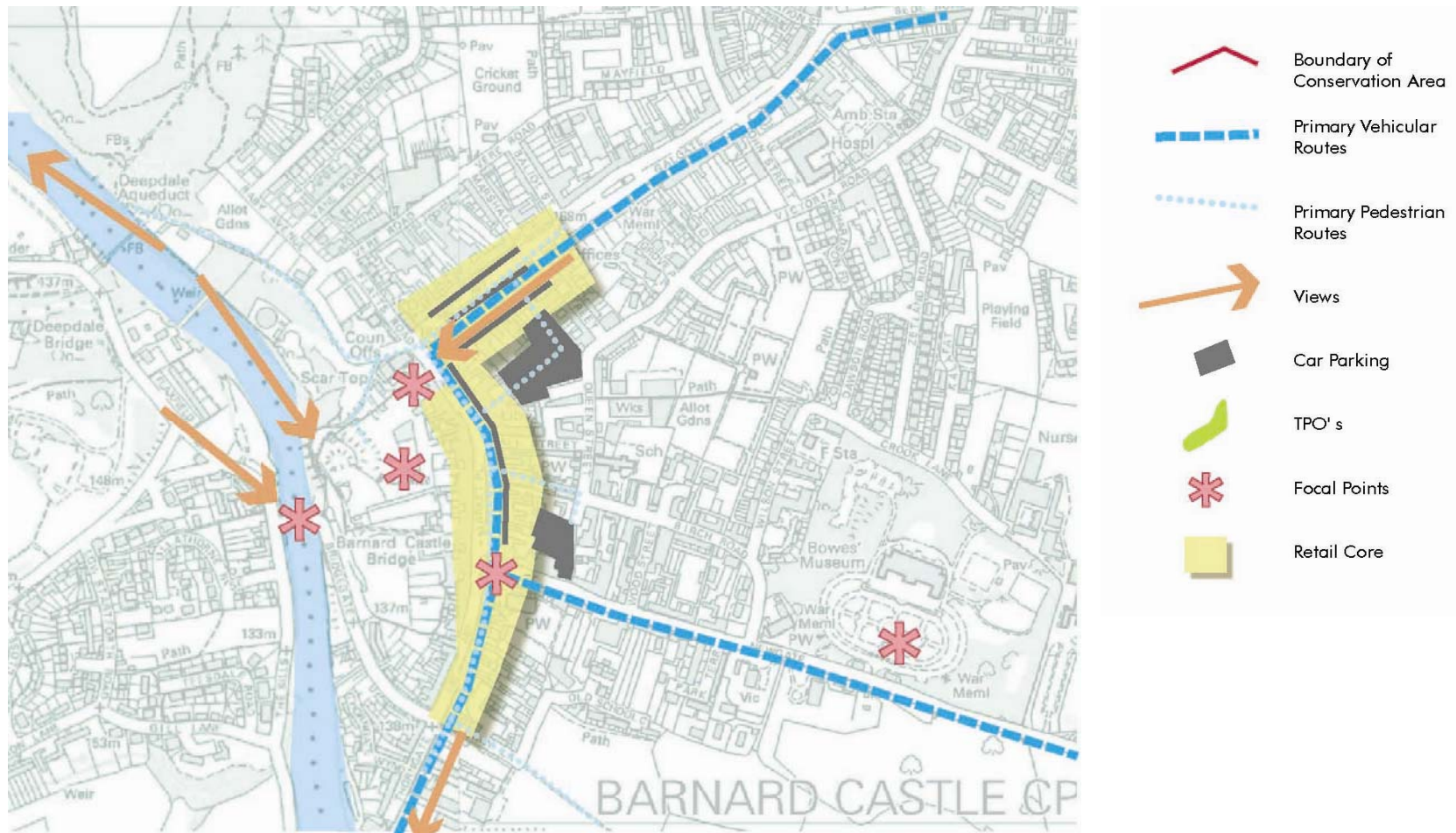


Figure 10 - Shop Window Displays



SWOT Analysis of Distinctiveness

Figure 11 - Analysis of Physical Distinctiveness



Strengths:

- The majority of the shop facades have retained their historical character.
- The Castle and the Bowes Museum as a tourist attraction.
- The backdrop of the Yorkshire Dales provides significant views from the town.
- Three defined character areas allow a sense of exploration and variety of experience.
- Uniformity of building, paving materials and street furniture create a cohesive streetscape.
- Key landmark buildings aid orientation.
- Vehicular approach from the west provides good views to the castle, and defined entrance to the town at County Bridge.
- Compact town that allows ease of exploration to the surrounding countryside.

Weaknesses:

- Market is small and lacks cohesiveness.
- The Castle is not easy to locate from within the town.
- The Bowes Museum is separated from the town.
- Pedestrian retail circuits are limited.
- Traffic circulation around the Market Cross is restricted.
- Poor orientation impedes pedestrian movement from car parking areas to the town centre.
- River Tees is not fully explored as a town asset.
- Car parking management.

Opportunities:

- Integrate Scar Top into the town as an enhanced amenity space.
- Improve access to and signage of The Castle.
- Develop a lighting strategy for key buildings including the Butter Market and the Methodist Church.
- Strengthen pedestrian routes into the town.
- Enhance areas of streetscape to allow opportunities for outdoor eating.
- Create an enhanced riverside walk, incorporating links into the town, and identify opportunities for enhancing The Demesnes area.
- Create pedestrian links to the Bowes Museum.

Threats:

- Any reduction to the size of the market.
- Traffic - specifically around the Butter Market.
- Vacant properties in key locations in the town centre.

Visual Retail Survey

Independent Retail

The independent retail sector in Barnard Castle is primarily found in the secondary retail areas of the town centre in the Galgate and The Bank area of the town centre, although some local retailers are scattered across the primary shopping area in Horse Market and Market Place.

In relation to goods and products that were identified as key attractors when visitors shop in market towns (MRUK research; June 2006), Barnard Castle has the following representation.

Gifts. Gifts were only visible as secondary products within card shops (and newsagents or in the local Tourist Information Centre and tended to not reflect the local scene.

Arts and Crafts. There are a number of art galleries that provides the opportunity to buy local products, including the Newgate Gallery and number of new outlets in The Bank and within Newgate. A pottery shop in upper Galgate also sells earthenware type Spanish products.



Books and Antiques. There are three bookshops in the town centre being the Christian Aid Bookshop in Galgate, Curlew Books in Market Place and All Things Book in The Bank. The Bank area is the focus for the antiques with seven antique shops surveyed in July, but since the survey at least one shop has closed.

Speciality Food. The town centre has no delicatessen but has a number of butchers, a farm shop and a greengrocers which displays food that is produced within the Teesdale area or region. There are two strong butchers within Galgate and on the corner with Horse Market that display local meat and associated products with the Marden Farm shop promoting its local suppliers. The Little Shop in Horse Market has diversified over recent years with its core fruit and vegetable offer now supplemented by a small delicatessen counter inside, offering local products.



Home Items. A key shop is Oswells located in a strategic premise within the Market Place. Whilst, the quality of the shop in terms of its window display, shop floor and attention to detail is exceptional, no local products are evident with lifestyle type goods being the emphasis. A Victorian and Georgian Furniture and Interior Decoration shop is also situated towards the end of Market Place next to the Bank, with Boyes Department store offering the typical range of household, kitchenware and furnishings, but again with no local identity.



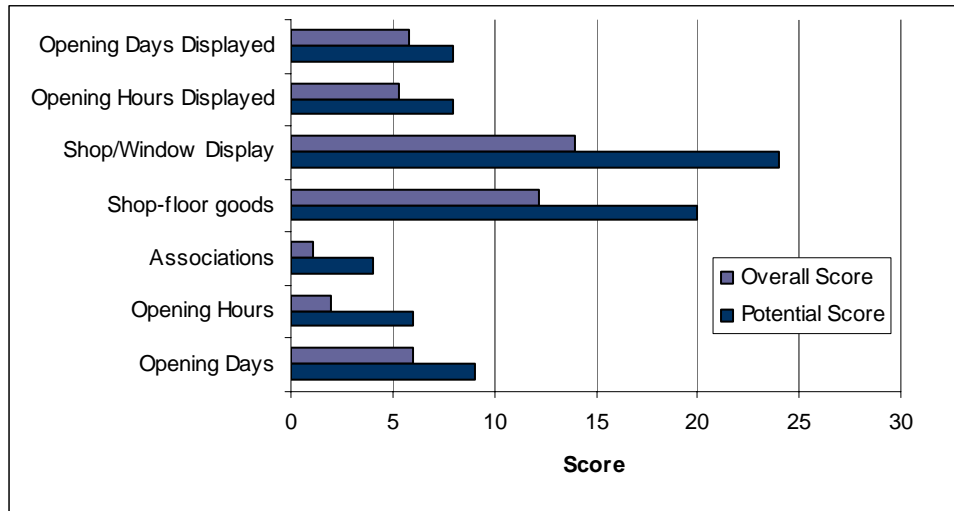
Outdoor Activities. Two outlets are located within the town centre, being Field and Forces Sport Goods and Outdoor Wear and 54 Degrees North, both in Galgate. 54 Degrees North has recently re-located from 31A and B Horse Market and provides general walking, outdoor pursuits type clothing and footwear with the Field and Forces shop having an association with army surplus and field sports. FE Wilkinson Sports Goods offer specialist shooting and fishing products, with a limited range of general outdoor wear.

The visual survey of independent retailers was designed to assess the distinctiveness and accessibility of the independent retail sector. The survey was held during August 2006 and included all the shops within categories described above. Factors examined included:

- Opening Hours Displayed – did the shops inform potential customers of their days and times of opening? This is based upon the issue of visitors arriving in a market town to find that shops of interest might not be open.
- Shop Window Display – did the retailers place any emphasis on local or specialist goods in their window displays, to bring visitors in?
- Shopfloor Goods – did the retailer place any emphasis on local or specialist goods on the shopfloor, to engage those who enter the shop?
- Opening Days / Opening Hours – was the shop open only during 9-5 Monday to Saturday, or did the retailer offer extended or variable opening hours to cater for customers who were unable to visit during traditional times?
- Associations – did the retailer show any signs of belonging to a wider commercial network?

All independent retailers within the sectors listed above were scored against the above criteria and results were weighted according to perceived importance, based on the results of the urban centre research.

Figure 12 – Visual Survey Results, Independent Retailers



Source: Miller Research – Visual Survey

Opening Hours / Days Displayed

Shops in Barnard Castle were the most likely of those across the three pilot towns to display information on their opening times and days, at just over 72% and 67% respectively. This was particularly important in some retail areas, such as the antiques shops on the Bank, which might not be open for more than two days per week.

Local or Specialist Goods

Shops in Barnard Castle scored relatively well on this measure, with 78% of retailers displaying some local or specialist products. In most cases this was specialist goods, although there were examples of local produce in the butchers and greengrocers. In terms of local or specialist goods on the shopfloor, the figure was similar, showing that retailers were able to carry through these themes into the range of goods for sale.

Opening Days and Hours

Barnard Castle again scored relatively well amongst the three pilot towns in terms of its hours and days of retail opening. More than 20% of shops included in the survey, with the majority opening Monday to Saturday. None of those surveyed opened for extended hours (ie beyond 9-5), possibly reflecting the lack of vibrancy in the town after 5.00 pm.

Trade or Product Associations

Barnard Castle rated low in terms of retailers displaying membership of trade associations – a measure of connectedness. Across those surveyed, only 28% of shops displayed any sign of association, implying a relatively low level of connectedness.

Independent Food and Drink

The independent food and drink sector in Barnard Castle comprises of an abundance of public houses that are primarily local drinking establishment, café and tea rooms and a number of restaurants. Public houses are found across the whole of the town centre as well as tea rooms and cafes with restaurants situated in the secondary areas.

In relation to specific food and drink establishments that were identified as key segments when visitors shop in market towns (MRUK research; June 2006), Barnard Castle has the following representation.

Tea/Coffee Shops. There are several tea and coffee shops across the town that are all local and quite established in terms of existence. These tend to be in single frontage units across the Market Place and within Horse Market.



Cafés. The Bakers Oven and Café occupies a prime location within Horse Market and Dales and Dream Café and Ice-cream Parlour is located at a key transition between the primary shopping area and the more specialist The Bank area. The Teesdale café is the largest café in the town but is situated to the rear of the Morrisons car park, picking up food shoppers and/or visitors to the car park.

Public Houses. There are ten public houses within the town centre with only four of them having a visible food offer. The Old Well Public House is an example of a restaurant type service, offering both indoor and outdoor eating (weather permitting). Most of the remaining public houses only cater for the sale and consumption of drinks and there is a general lack of family orientated public houses in the town centre.





Restaurants/Wine Bars. Five restaurants are located in the town centre, all set outside the primary shopping area within either Galgate or The Bank. An established name in the town and locality is Balgreaves located along The Bank. It is joined on the upper side of The Bank by Bailies and Penny's Restaurant and by a Chinese Restaurant – Lucky House situated the middle of The Bank. Valentines is the sole restaurant outside The Bank area in Galgate, which also offers a lunchtime menu, in contrast to the other four.

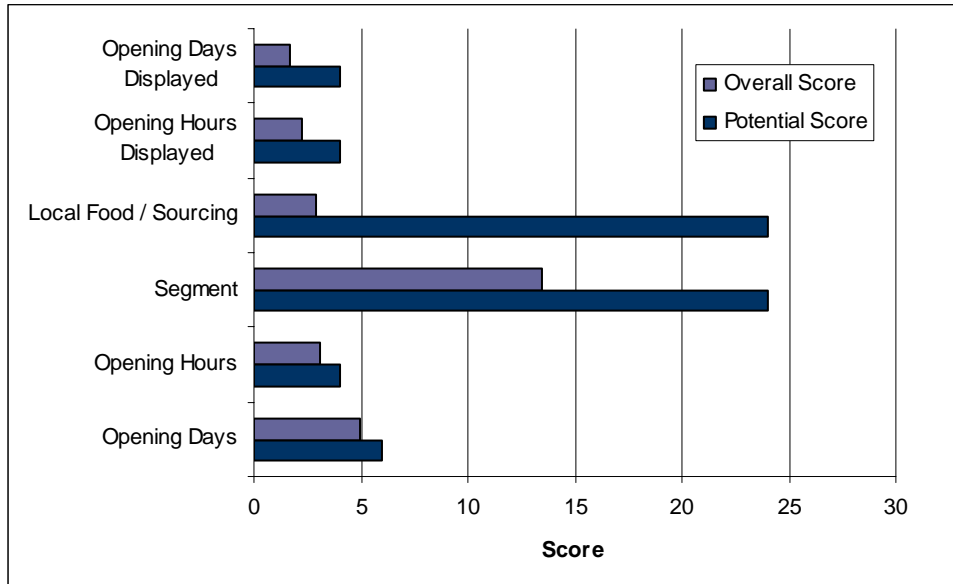
Sandwich Bars. One sandwich bar exists which is Oliver Twists outlet in Horsemarket. There are only cafés and tea rooms / coffee shops. **Oliver twist**

The visual survey of food and drink establishments was designed to assess the distinctiveness and accessibility of the sector. The survey was held during August 2006 and included all the premises within the categories described above. Factors examined included:

- Opening Hours Displayed – as with the survey of independent shops, did the food and drink establishments inform potential customers of their days and times of opening?
- Local Food / Sourcing – did the proprietors place any emphasis on local food or the sources of ingredients in their menus, to attract customers looking for local produce? Was the food on offer home made?
- Segment – What was the mix of food and drink premises? Was there a reasonable representation of fine dining and coffee shops, as well as takeaways and pubs offering food?
- Opening Days / Opening Hours – what was the range of opening hours? For example, was there a range of food and drink offers in the evening and mid-week?
- Associations – did the retailer show any signs of belonging to a wider commercial network?

All independent retailers within the sectors listed above were scored against the above criteria and results were weighted according to perceived importance, based on the results of the urban centre research.

Figure 13 – Visual Survey Results, Food and Drink Establishments



Source: Miller Research – Visual Survey

Opening Hours / Days Displayed

Premises in Barnard Castle scored fairly well amongst the three pilot towns, in terms of customer information on opening hours and days. More than half of all eating and drinking establishments displayed their times of opening, although the figure was lower for days of opening (42%). It should be noted that public houses were not rated on this measure.

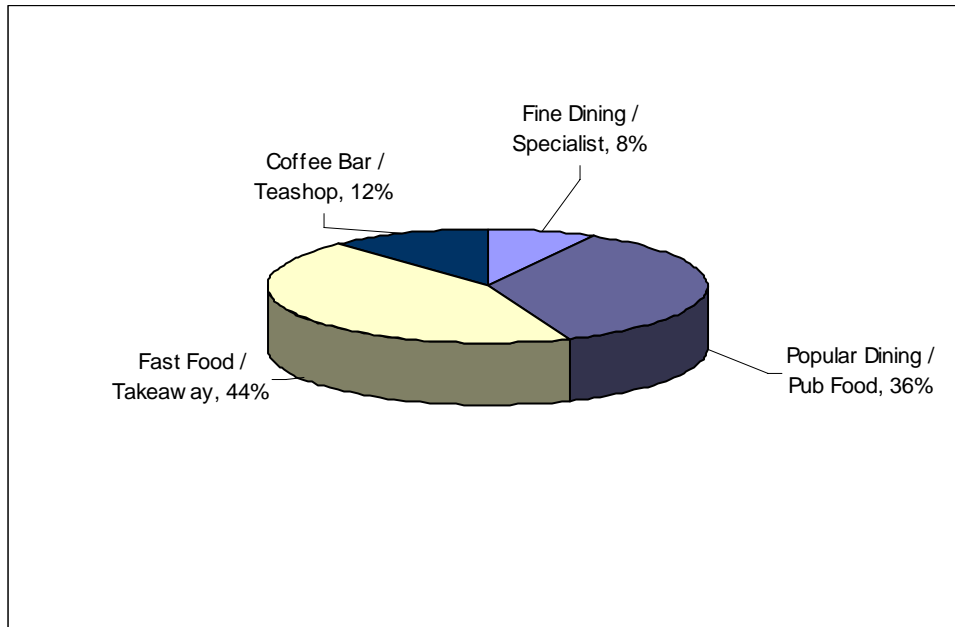
Local Food and Sourcing

None of the three pilot towns showed a strong presence of locally-sourced or distinctive food on their menus. In Barnard Castle, less than 20% of establishments made any reference to either sourcing or produce being home made. However, this was around average for the three towns.

Segment

The mix of food and drink establishments in Barnard Castle was at the lower end of the scale, in terms of comparisons with the other pilot towns. This reflects the relative lack of eating places, especially coffee shops and teashops, despite the presence of a small number of quality restaurants.

Figure 14 Food and Drink Establishments, by Segment

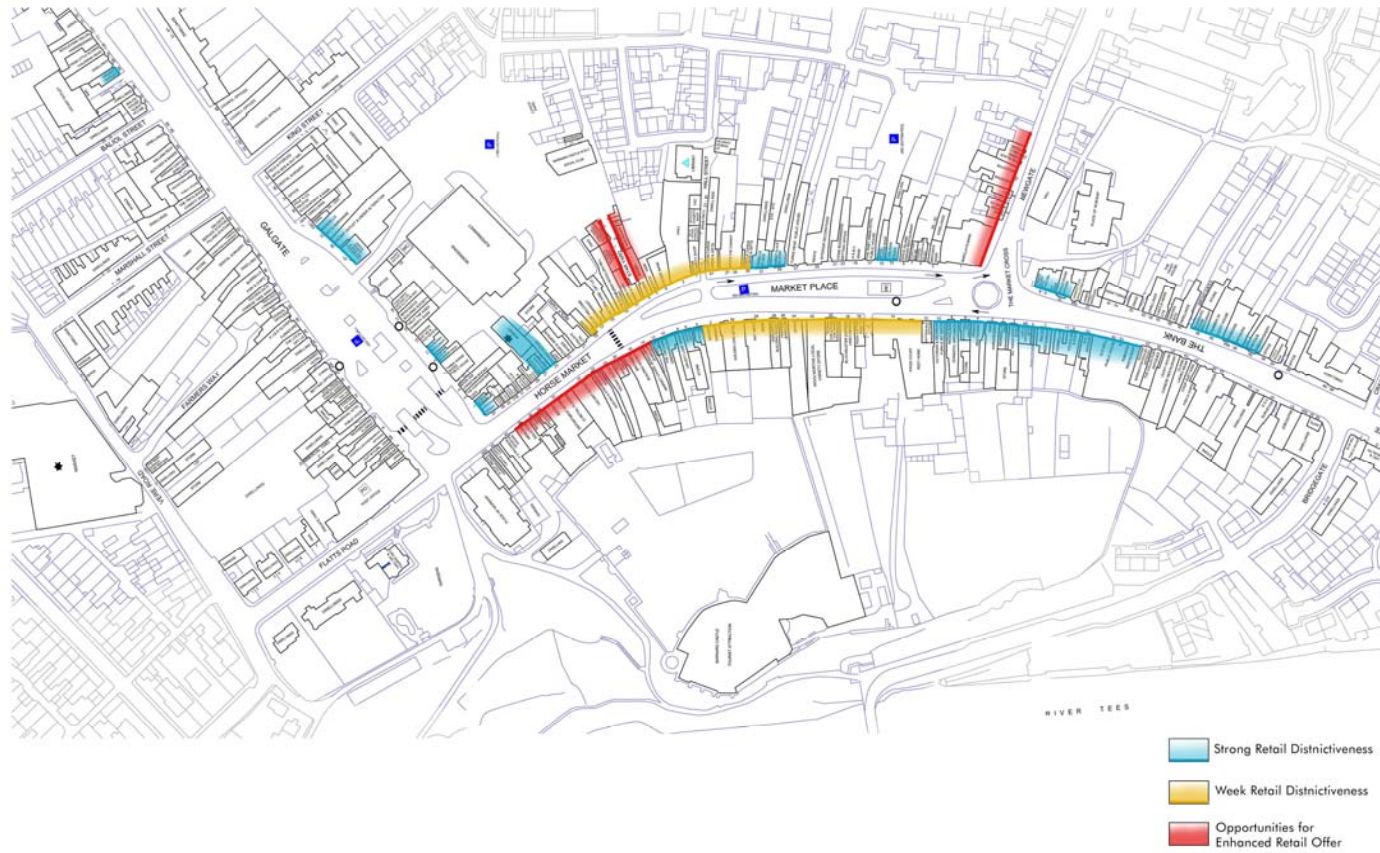


Source: Miller Research – Visual Survey

Hours and Days of Trading

Again, Barnard Castle was above average on these measures. Two-thirds of establishments were open seven days a week (reflecting the predominance of pub food and takeaways) and 53% were open both during the day and in the evening.

Figure 15 - Visual Survey - Retail Distinctiveness



Source: Miller Research – Visual Survey

Markets

Introduction

Barnard Castle general market (GM) is held in Market Place every Wednesday. Trading times are between 9.00 and 3.00 although it was observed that a number of traders do not adhere strictly to these times, generating a sense of disorder towards the latter part of the market day. The farmers' market (FM), in Barnard Castle, which is farmer accredited, takes place on the first Saturday of each month and generally runs from 10.00am to 3.00pm¹. The market has been running for 7 years and is organised by Teesdale Marketing. The market attracts approximately 25 producers and the vast majority of them fall into the 30 mile radius recommended by the National Association of Farmers' Markets.



Design

The market stalls are positioned in a single line parallel with the road. This layout ensures that the road through the town remains open during the hours of trading. However, it also means that the market does not have the same vibrant atmosphere of a more concentrated market arrangement and people did not appear to be visually drawn into the trading space. Indeed a substantial proportion of pedestrians on Market Place pavement by-passed the market completely without stopping at stalls even momentarily.

Furthermore there was no uniformity to the design of the stalls themselves at the GM and the quality of many of the structure was very poor. Both these points undermined the vibrancy and ambience of the market as a whole. Several of the traders did not have a stall structure at all, with one individual displaying goods on trestle tables and another vendor selling plants on the cobbled area in between stalls. The layout of the market became increasingly haphazard throughout the afternoon as individual vendors left at different times and spaces appeared between stalls that were subsequently used for parking. There is greater regularity in the stalls used for the FM, which are owned by Teesdale Marketing.

Traders

Approximately 15 stalls attend the GM selling various items including clothes, books, antiques, gifts, household equipment, animal feed, ICT equipment, cakes, plants, fruit and vegetables and cards. However, the GM does not have a sufficiently wide product base, and could be improved by incorporating

¹ It should be observed that comments on the Wednesday market relate to first hand observation whilst details of the farmers' markets are based upon a telephone interview with the market coordinator

a variety of new traders. The FM offers a broader range of products but could benefit from having more usual or distinctive producers.

Consumers

It was observed that OAPs and families make up a significant proportion of the customers, although it should be noted that the survey of the market was carried out during the school holidays and that the latter group could be reduced at other times of the year. The FM generally attracts about 1,500 visitors and the average spend per day-visitor is £12.40 per person. For visitors who are staying overnight this figure rises to £40.30 per person². A broad range of people are attracted to the FM and comprise a mixture of locals and visitors to the area. Visitors come from as far as Durham, and even Nottingham in response to special promotions and many market shoppers regularly visit a network of FM held at different times of the months in various market towns within the region.

Additional features

The producers at the FM have their own method of securing custom through 'co-opetition' which is a reciprocal arrangement whereby producers recommend each other to customers. This is beneficial to the FM as a whole by enhancing the commercial ambiance of the market day.

There is currently an idea being developed among the FM traders for a 'mutton renaissance' endorsed by Prince Charles and aiming to boost the mutton industry in the local area through the FM.

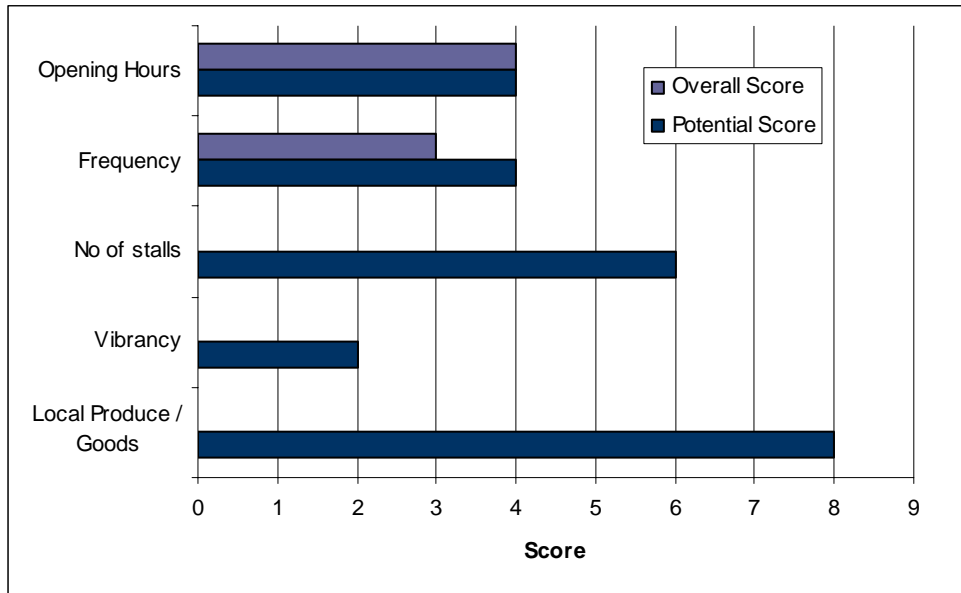
Impact of the market on the town

Most visitors to both the GM and the FM travel by car which can create parking problems in the town centre. Arguably the effect of the markets on parking in and around the town is disadvantageous for local business. People may be discouraged from visiting the town on market day because the stalls create greater congestion on the pavements and monopolise a considerable proportion of the town centre parking spaces.

A significant proportion of the FM visitors are returning customers, many of whom come to the town especially for the monthly event. The town is undoubtedly busier on trading days, and local eating establishments in particular claimed that business was better during the FM.

² Figures from a separate survey undertaken recently by Teesdale Marketing

Figure 16 Visual Survey Results, Markets



Source: Miller Research – Visual Survey. Note: Does not include Farmers' Markets

Customer Care

Greeting

Independent retailers in Barnard Castle scored predominantly well in the mystery customer surveys. The vast majority greeted the customer immediately or within a minute of their arrival in their establishment. This was usually in the form of a 'hello' but in some cases the greeting was more substantial and included a comment on the weather or the busy activity in the town sector. Almost every retailer was prepared to spend time with either the mystery shopper themselves or another customer. Examples included one individual who offered some information on the history of the Butter Market, and another who discussed the various merits of the Food Festival held recently in Barnard Castle.

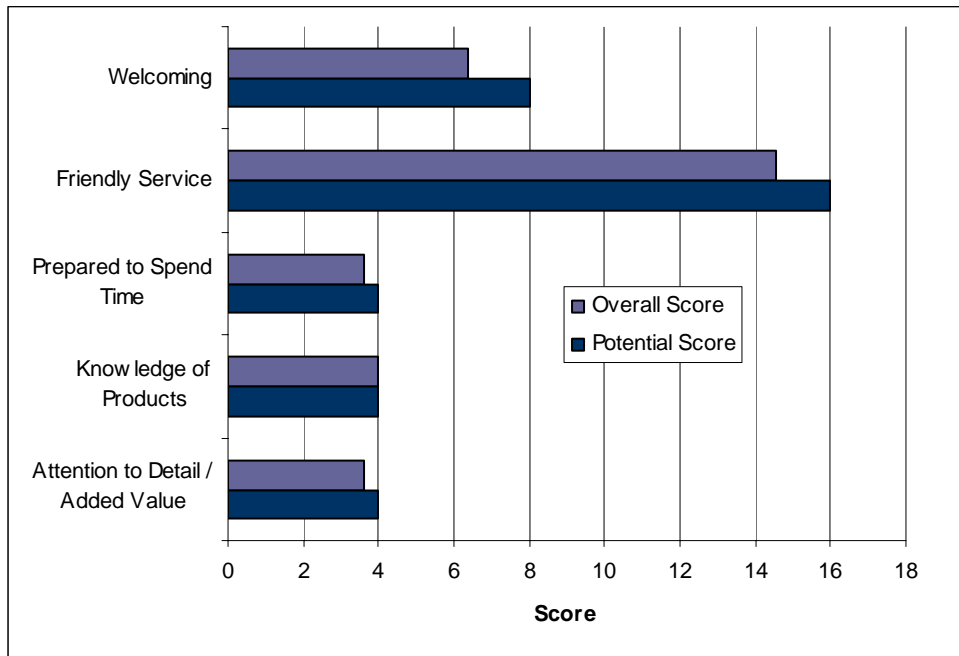
Knowledge of Products

Almost every retailer demonstrated some knowledge of their products. In eating and drinking establishments in particular proprietors and staff were willing to discuss their recipes and suggest alternatives to suit a particular customer's taste. One retailer offered information on their local supplier and the organic standards that applied to the majority of the produce. Another gave detailed advice on their climbing equipment and was willing to recommend products that were of best value.

Added Value

Almost every independent business displayed some form of added value or enhanced customer care. Only in one shop did the sales assistants appear marginally stressed and thus dealt with their customers comparatively swiftly. Examples of exemplary attention to detail or enhanced customer service were observed in a gift shop where the sales assistant was prepared to gift wrap an item purchased from their shop and an antiques shop where the proprietor was willing to give a brief tour of their large-scale establishment. In one eating establishment the waitress offered particularly friendly advice on a local speciality.

Figure 17 Mystery Shopper Results – Customer Service



Source: Miller Research – Mystery Shopper Survey

Views from Local Businesses

Business Profile & Changes

The views of independent retailers regarding the level of change in the commercial environment in Barnard Castle varied considerably. Many of those interviewed expressed concerns with declining trade and cited parking issues, competition from neighbouring towns and cities, national recession and changing consumer habits as causing this decline. Access to some of the businesses in the town centre is evidently a problem as several of the shops do not have rear access and on market days in particular the main street can become extremely congested making it problematic for lorries to access the shop. Several individuals however boasted an increase in business performance. An independent outdoor clothing shop for example experienced 30% increase in sales subsequent to moving premises. The move to a larger and better located property afforded the opportunity for the business to "re-invent itself" and to introduce new clothing lines, extend the general range of products and improve visual displays, precipitating this substantial commercial growth. Of those who reported positively on the commercial climate of Barnard Castle, a number felt that the town was a good location for many of the independent shops and businesses, as it is compact, has the road passing through the town centre and yet it is comparatively easy to access as a pedestrian. A minority of those interviewed reported no obvious changes in trade levels.

Customer Profile

Regarding customer profile, most businesses reported a wide ranging age profile of customers and a combination of local and visitor trade. Some of the more distinctive shops stated their awareness of people travelling to Barnard Castle from as far as Darlington and Middlesbrough. It was evident that a few of the businesses primarily targeted a local market with one shop in particular offering free delivery in and around Barnard Castle. By comparison several specialist shops capture a significant proportion of their trade through internet sales. Despite having a web-site themselves however, one specialist retailer believed the internet was harming their business by inducing people to shop from home rather than come into town where they are obliged to pay for parking and may not necessarily find prices more competitive. For the majority of the specialist independents, customers generally hear about their business through word of mouth.

Impact of markets on business

For the overwhelming majority of businesses the general market (GM) day is the worst day of the week for trade. Some were of the view that typical visitors to the market are generally looking for a bargain and are unlikely to be the type of individual to purchase quality goods from specialist independent retailers. Furthermore, the market monopolises space that would otherwise be used for customer parking and so

has a negative impact on trade. One retailer commented on the on-going deterioration in the quality of the market and suggested that it was bringing fewer people into the town than in previous years. A small number of respondents believed that the GM has nominal impact on their business.



Regarding the farmers' market (FM) several local business owners believed it attracts a different profile of customer than the GM and can thus have positive impact on trade. One individual in particular claimed that the FM appeals to "a different clientele of countrified people" who are often more likely to purchase the more specialist products sold in some of the small independent shops. There was a general perception among some retailers that the farmers' market has a more positive impact on their business than the regular market, in part because it is run more efficiently, with regulation sized stalls that are well maintained by Teesdale Marketing. In addition, the duration of the FM is not as long as the ordinary market and therefore uses parking spaces for a shorter period of time. A few respondents believed that the FM can impact negatively on their business partly because people are coming into town to purchase fresh produce and so choose not to stay in town and browse for as long a period of time as they might do otherwise. One independent retailer claimed that the FM generated unwanted competition for their fruit and vegetables. Whilst people who visit the farmers' market may come into the shop, in general the market hinders trade for this particular business.

Town as a retail centre

In response to questions about the town as a retail centre, several commentators reported at least five empty shops in retail centre of the town and several independent businesses replaced by discount stores and charity shops. Furthermore there has been a succession of closures of quality independent shops due to owners reaching natural age for retirement. Certain retailers who had been familiar with the town for many years commented on the slight acceleration in the closure of independent shops. Whilst some felt that Barnard Castle still retains some of its unique features, others in the town in gradually becoming more homogenised. More positively, some respondents believed that there is still a substantial range of small independent shops in Barnard Castle

In general Morrisons was not viewed as favourably as Safeway. Despite acknowledging distinct gaps in the retail offer in Barnard Castle, some retailers opposed the establishment of large multi-nationals in the town centre. Others specifically praised the absence of many nationals in Barnard Castle. It was felt by some however, that the town needs a better range of banks, as currently people are obliged to travel to other retail centres to visit many of the major national banks. A number of people believed that the town

lacked both sports shops and a quality electrical shop and that many of the independent businesses suffered because consumers were forced to travel to other towns to purchase such goods.

Strengths of the town



Regarding positive comments on the town, reported strengths included a decent car park, a good range of pubs, restaurants and cafes and the fact that Barnard Castle is easily accessible from many major towns and cities. A key strength of Barnard Castle is that the road runs right through the town centre and thus visitors are drawn to the various shops and businesses that are located along the route. The combined traffic and pedestrian movement contributes to the image of a

busy market town. Some felt that Barnard Castle has good sense of space and the shape and layout of the town centre boosts trade for local businesses. Others praised the attractive architecture in town centre and beautiful surroundings of Barnard Castle. Some retailers were of the view that customer service in many of the local shops is slower but is consequently friendly and more genuine and appears less automated than is found in large nationals. It was suggested that on a national level that the image of 'customer service' has become devalued and is characterised more by contrived politeness than natural friendliness.

Weaknesses and shortcomings of the town

Regarding the retail offer, some respondents felt that many of the shop units in the centre of town are too small to attract large nationals. In particular the town lacks a quality clothing retailer.

A large number of comments were expressed in criticism of the lack of conformity in opening hours among many of the independent shops as some are closed on different days and this is often due to the fact that owners of small businesses are regularly required to attend business fairs or visit whole-salers. For joint advertising in particular to work, there is a need for greater collaboration of shop opening times. It was felt that Teesdale Marketing could coordinate this. It has also been identified by Teesdale Marketing that the closure of shops and businesses on a Sunday is not supporting associated tourism activities in the town and District and support needs to be explored.

Parking is big problem and failure to find a parking space acts as a strong deterrent for visitors to stop in the town centre. According to some retailers there is currently insufficient signage prohibiting parking on the cobbles during market trading hours. Moreover, other reported poor traffic management in town

especially on market days when cars frequently trap market traders in by parking in spaces left by early leavers.

Another problem for the town is the lack of adequate signage on main roads around the town and the consequent failure to "lead" visitors into the town. One individual whose business was located at the bottom end of town felt that the steep gradient of some of the streets in Barnard Castle discouraged some visitors to the town, in particular OAPs.

The industrial heritage of the area and the negative perception that many people have of the North in general was felt by some to have perpetuated economic deterioration in Barnard Castle. Similarly others commented on the poor publicity of tourist events in town, whilst a joint venture campaign between Teesdale Marketing and Teesdale District Council has been proactive in developing a series of event guides for the town centre. For example, one retailer had not heard of the forthcoming food festival. One individual believed there is no overt emphasis on tourism in Barnard Castle and that consequently many visitors pass through en route to the coast or the moors without appreciating the various attractions of the town. Consequently there is the need for better national publicity for local tourist attractions such as the Bowes Museum and its multifarious events.

Business Support

Regarding business support, some of the local respondents claimed they had received support from Teesdale Marketing, with interviewees also coming into contact with Teesdale Enterprise Agency, naming a number of business advisors. Some respondents felt that there was clarity as to the function and role of Teesdale Enterprise Agency, in contrary to some hesitation as to the actual remit of Teesdale Marketing. General support has included contributions to funding for business web-sites, marketing and training, and guidance on maximising business rates reductions. Business Link has also provided help with establishing a business website and Teesdale Development Company offered financial advice to one individual. Some retailers were members of the Small Business Network that offers free banking and one respondent had qualified for Foot and Mouth relief. A number of businesses however reported no experience of business support in any form, although when subsequently asked if they would accept any support in the future, most responded positively. Some respondents did comment on being confused on who lead on business development advice in Barnard Castle and the need for greater clarity and rationalisation was called for by some local businesses.

Whilst not identified by any of the retailers and businesses interviewed, it should be acknowledged that the quality of the physical environment within the shopping areas has been due to a programme of activity lead by Teesdale District Council and Teesdale Council including a shop front improvement scheme,

historic centre re-paving programme, a new gateway feature in Galgate, the Galgate/Scar Top/Castle townscape improvements and business grants to retailers from the District Council, amongst other initiatives

Relationship with council

Most local businesses claimed that they had a poor relationship with the District Council with several criticising them for being quick to condemn late payment of business rates failing to and offer sufficient levels of rates relief for independents. One retailer criticised the County Council for opposing their pavement displays and claimed that street signage outside speciality shops can be very important for attracting customers.

A number of respondents openly criticised the District Council, expecting a better standard of service than what was being currently delivered. The view was expressed that the Council should take a more proactive role in efforts to introduce a greater variety of specialist independent shops, by offering reduced business rates and start-up grants to small businesses.

One individual claimed to have little contact with the Council and commented on the difficulty of distinguishing between the town, district and county council, and knowing which institution to approach for help with a particular problem. However, there were some positive perceptions of the District Council as a well-run institution.

Opportunities

One retailer expressed interest in an ICT course in order to maximise the potential benefits of their business website which they feel is currently underused.

Regarding tourism it was felt that Food festival needs to take place within central Barnard Castle itself because at present, the event at Bowes Museum draws people out of the town centre. The picturesque landscape, the castle, the Bowes Museum, the Butter Market and the aspect of Barnard Castle as a compact market town all need to be marketed better as tourist attractions through leaflets and internet advertising. It was suggested that speciality shops could have advertisements in the TIC as they are a key tourist attraction within the town centre.

There is already an established pattern of local people using the town bus, however, the service could be extended and be marketed more effectively, in order that tourists could use the local bus service which would in turn reduce the number of cars parking in the town centre.

In terms of parking generally, a number of local retailers felt that there is a need for a disc parking scheme in town centre. The cobbled area in the centre of the town is especially suited to such a scheme. Discs should be available from every local business which will bring people into shops and induce them to spend. Moreover, a two-hour maximum stay would ensure a quick turnover of potential customers. One individual felt that there is a need for an out of town park and ride facility. Another retailer suggested that the council offices be moved out of the town centre to reduce number of car parking spaces used by council workers.

Fundamental issues

Responses from independent retailers on the fundamental issues affecting Barnard Castle and their business centred largely on two issues: parking and declining visitor numbers. There is a perception from the retail sector that visitors have declined, yet bed night stays have increased since 2003, with an additional 17,000 for the whole District. The opportunity is therefore to market the town centre as a distinctive destination and a base for a number of attractions and experiences. For many, car-parking was a key theme. Free car-parking spaces are monopolised by local retailers and therefore limit the spaces available to visitors and potential customers. Moreover, many of the cars will remain in these spaces all day despite the 2 hour restrictions imposed on these areas, because local people know that there is no regular patrol in the town centre. It was felt that local businesses lose a significant proportion of trade to Northallerton because the town offers free parking facilities.

Several commentators reported insufficient numbers of visitors to the town to sustain independent businesses. It was felt by some that many people have a negative preconception of the town and that the town centre is poorly marketed as a tourist attraction.

One respondent highlighted the tension between the need to bring in more visitors to stimulate business growth and the threat to the environment and countrified way of life in the town. This individual expressed reservations at the development of an extensive tourism drive within Barnard Castle.

6 Key Findings

This survey has aimed to measure the level of distinctiveness within Barnard Castle town centre in the context of the three pilot towns, using the indicators developed across the previous sections. In the final distinctiveness compilation, three sets of indicators have been weighted up by a factor of 2, to account for their relative importance. These were:

- Independent Retail
- Food and Drink
- Physical / Aesthetic

In this way, an overall model has been devised, which is broadly in line with the relative importance of individual factors expressed by interviewees in the urban street surveys. Hence physical attributes, which contribute to factors such as perceptions of open space, historic character and overall atmosphere, are rated more highly than the retail offer and other factors.

Level of Retail Distinctiveness

The overall contribution of each set of indicators to the final score is as follows:

Indicator Set	Potential Points Contribution
Physical / Aesthetic	240
Independent Retail	168
Food and Drink	120
Markets	36
Customer Service	36
Total	600

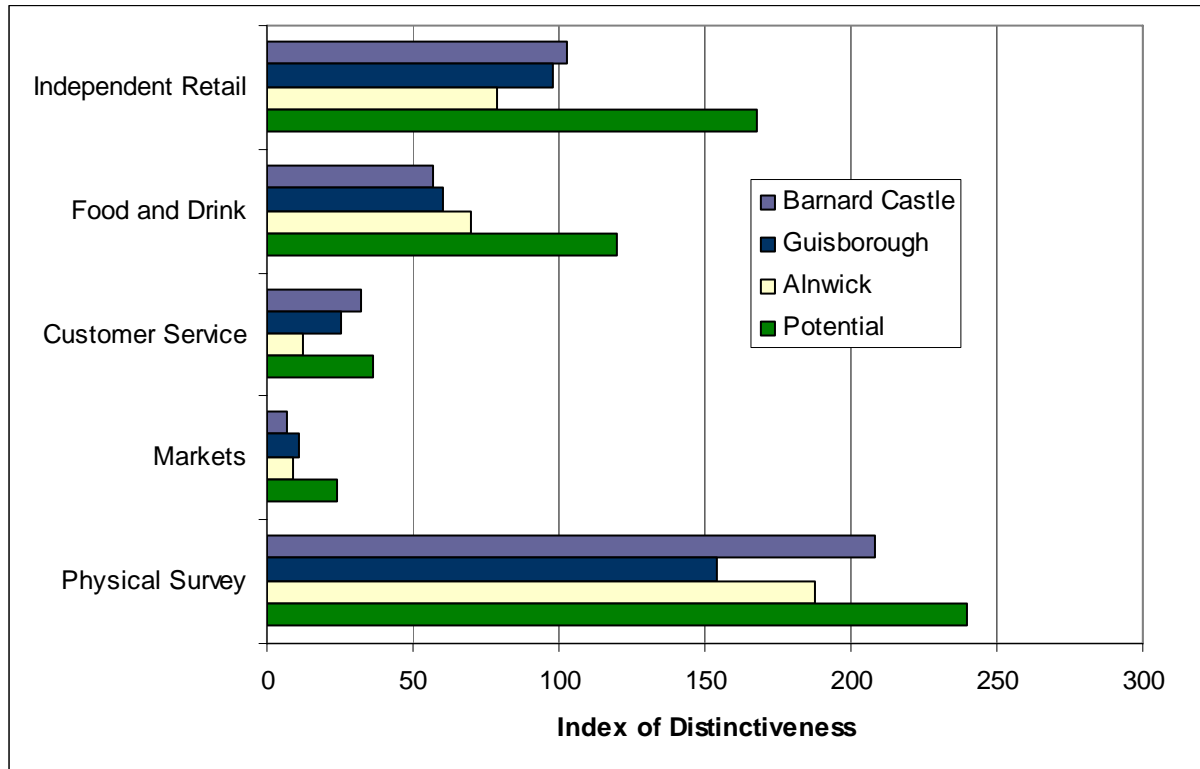
Whilst the assignment of these values will be the subject of further debate, the model can be said to be largely evidence-based and one which has been tested in physical situations through the piloting process.

In terms of overall results, towns were rated as follows, out of a total of 600 points:

- Alnwick – 358 points
- Barnard Castle – 407 points
- Guisborough – 348 points

These totals may be broken down as below:

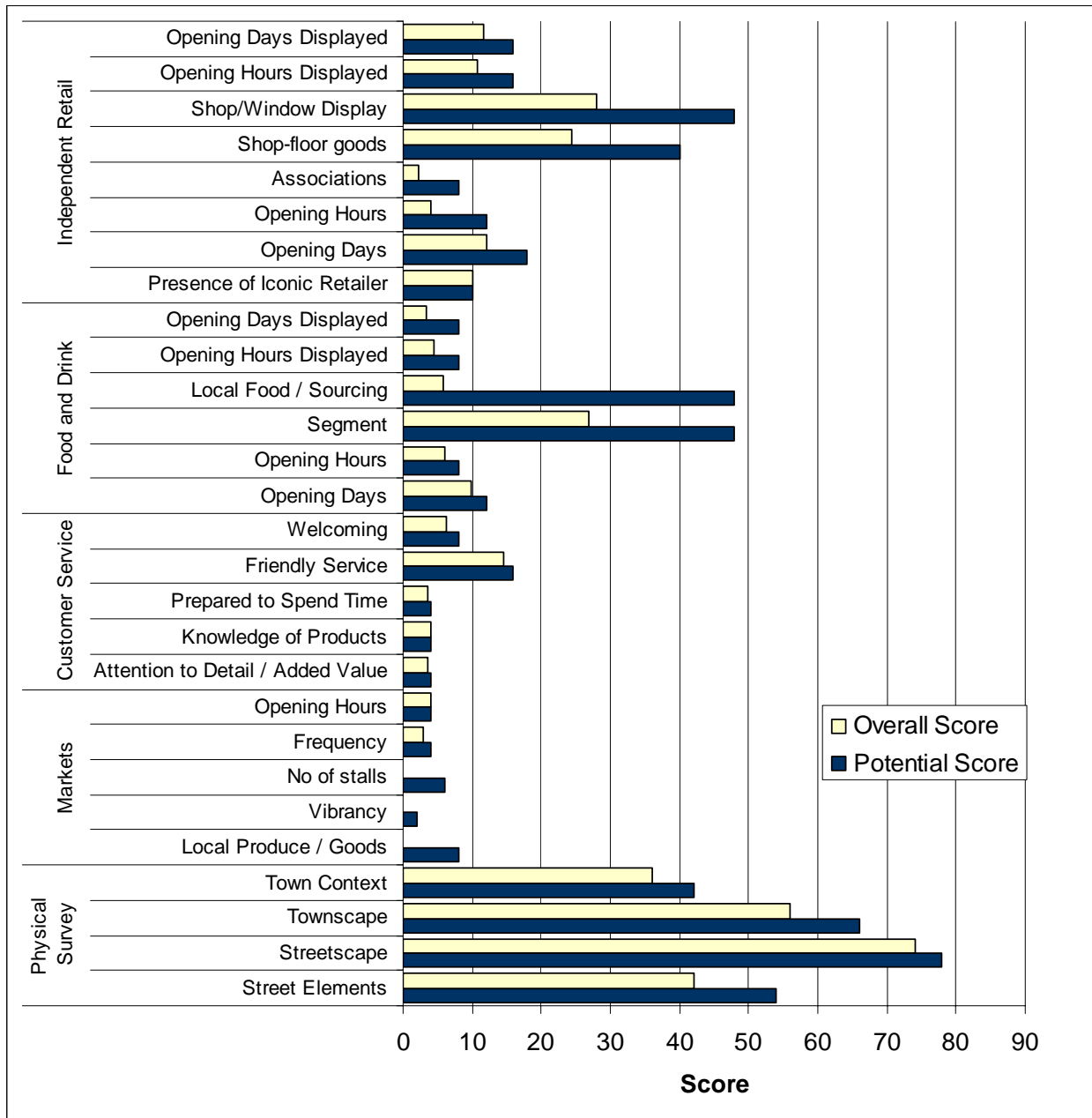
Figure 18 Pilot Towns – Comparative Scores for Retail Distinctiveness, by Indicator



Hence Barnard Castle scores highly on the physical makeup of the town, its independent retail sector and customer service, whilst it falls short on its markets and its food and drink offer.

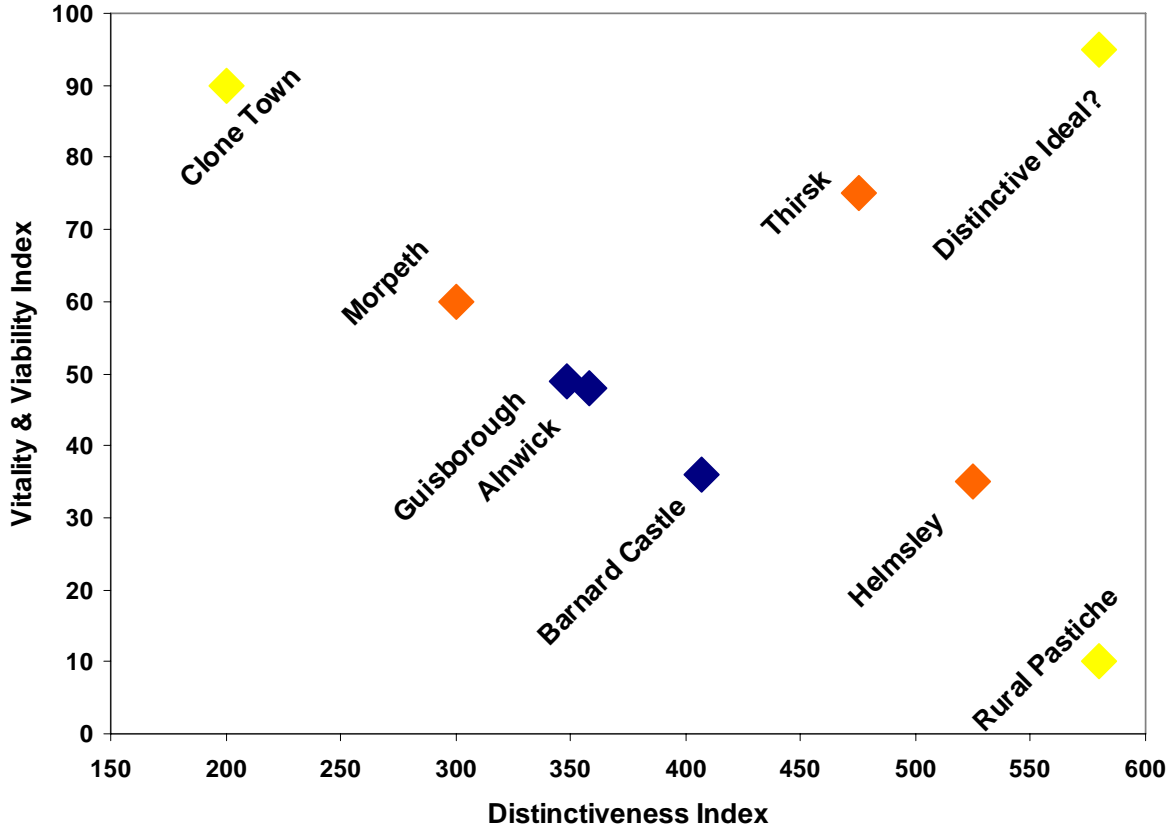
The graph overleaf breaks down the individual indicators further and begins to highlight possible areas for attention in terms of action planning.

Figure 19 - Summary of Distinctiveness Indicators Against Potential Scores



Using the results from the vitality and viability and retail distinctiveness surveys, we can indicate where the town centre is positioned against its full potential. The results are shown in the graph below:

Figure 20 - Relationship of Barnard Castle to the other pilot towns



The survey has attempted to capture the various levels of retail distinctiveness within a market town such as Barnard Castle. In analysing the results from the different surveys, we have identified the following key findings, overleaf.

SWOT Analysis

Whilst the survey stage has provided us with the opportunity to become more absorbed in Barnard Castle town centre, the overall project process to date has led to a more holistic and natural understanding of the town and the identification of its strengths and weaknesses, as identified in the table below.

Table 3 - SWOT Analysis - Barnard Castle

<p>Strengths</p> <ul style="list-style-type: none"> • Strong community • Good employment base • Character • Bowes museum • Good presence of independents • Arts / crafts / books / antiques base • Local products / produce • Isolation protects identity • Teesdale – landscape asset 	<p>Opportunities</p> <ul style="list-style-type: none"> • Gastro pubs • Walking / cycle network • Local food culture • Business networking • Maximising the use of redundant community buildings • Community arts festival • “Day out in BC” • Eco opportunities • Arts studios / workshops • Micro-brewery • Widen appeal of food festival • A66 dualling – access to markets / investment activity
<p>Weaknesses</p> <ul style="list-style-type: none"> • Fragmented / non-visible delivery body • Declining market • Car park management / enforcement • Lack of accommodation • Lack of restaurants • Pubs – local, not food / family focused • Bowes museum – detached from town • Empty shops in prime areas • Disconnected – layout and network • Employers not engaged • TIC Location • Marketing of town as a specific tourism destination for the consumer market • Lack of quality national chains • Lack of coach parking 	<p>Threats</p> <ul style="list-style-type: none"> • Large employers closing • A66 dualling – marginalisation / opening up competition • Land ownership constraining development • Marginal viability of shops • Declining visitor numbers • Competition from urban centres and other market towns • House prices • Unstable local authority • Lack of servicing for shops • Traffic around Butter Market • Market shrinking – could go below critical mass

Key Findings

- **Some leakage of trade but location of Barnard Castle creates a level of distinctiveness**
- **Quality townscape and space, but lacks connectivity across the town centre**
- **Keynote buildings positioned in prime locations and key attractors need better linkages**
- **Broad range of independent shops but appear isolated and lack cohesion or seen part of a network**
- **Some areas “closed for business”**
- **Opportunities for arts and crafts quarter and outlets**
- **Local food is present but not prominent**
- **The pub offer is very weak – local custom only**
- **General weekly market is poor, yet farmers market is a key draw**
- **Town has a great personality and culture – good added value – need to share best practise**
- **Town centre management and support – need for co-ordination and co-delivery**

Vitality and Viability

The town is perceived to provide an adequate level of shops and services, although the local community is accustomed to shopping out of the District for other food items, although these are predominantly comparison and specialist products. Whilst the vacancy rates for premises are not significantly high, the position of vacant premises is mostly within strategic locations contributing to a deteriorating image and weakening town centre offer. Parking needs to be more accessible and better managed in terms of enforcement, supply and linkage with the town centre, and how it services shops and key attractions, so that an extended pedestrian circuit is achieved. Whilst through traffic adds to the vibrancy and animation of the town centre, accessibility from the primary shopping area into the more specialist area of The Bank and onto the riverside is an issue.

Physical/Aesthetic

The town centre is historically developed on a spur of land reaching to the River Tees & terminating with the castle. The retail centre is essentially an 'L' shaped street pattern, with a compact development dictated by its historic street pattern. The highest point is at the northern end of Galgate to its lowest at the bottom of the Bank - approximately 40m. Car Parking is tucked away and there is little orientation to

allow movement to the town centre, with limited opportunity for pedestrian retail circuits. Pedestrian movement would be enhanced through the addition of pedestrian crossings on Newgate, Market Place and Bridgegate. Scar top is fairly well used at times, but is a missed opportunity and could be better integrated with the town. The town centre has broad and good public space, but lacks connectivity from top to bottom. There has been a clear demonstration that the quality of the town centre has been achieved already through the activity of Teesdale District Council and Teesdale Marketing, It should be acknowledged that the quality of the physical environment has been due to a programme of activity lead by Teesdale District Council and Teesdale Council including a shop front improvement scheme, historic centre re-paving programme, new gateway feature in Galgate, the Galgate/Scar Top/Castle townscape improvements and business grants to retailers from the District Council, amongst other initiatives. The key to future success is the continuity of materials but to also maximise the use of space and to improve accessibility across the various space and the promotion of activities. There are also missed opportunities for utilising under-utilised keynote buildings and spaces, as well as stronger pedestrian links between the Bowes Museum and the town centre.

Local Independent Retail

The town has a broad range of local Independent shops but sometimes appears isolated and disconnected due to the town centre environment, business rates and a lack of alignment with like minded shops and services. The availability and prominence of local goods and produce was the best out of the three pilot towns, but there needs to be further investment in local branding and merchandising. Whilst the retail and business sector operates in a visible manner in terms of opening days and hours The Bank is beginning to lose its cohesiveness due to it often appearing “closed for business”. It should be noted that there are a number of examples of proactive independent retailers that are not currently engaged with the local business infrastructure and could be further encouraged to contribute to a stronger retail offer. Opportunities for building on a number of art and crafts outlets exists with Newgate Street providing a key axis to the Bowes Museum and potential for drawing additional trade into the town centre. There is a key need for businesses to act as a collective and to explore associations and networking so that the overall local retail product is more legible and accessible.

Local Food and Drink

Local produce is present but not prominent within food and drink outlets, with local food sourcing and its marketing an issue. There is a high level of hot food takeaways within prominent frontages and spaces that require tighter planning control and a shortage of tea and coffee houses, compared to the other two pilot towns. The pub offer is very weak only catering in the main for local custom and not addressing the family and “gastro-pub” type markets. There is also little investment by major public house chains in the town centre. Whilst there is a steady base for evening time activity, in relation to fine dining/restaurants

there appears to be no co-ordinated strategy for drawing people into Barnard Castle beyond 6pm with restaurateurs working in a solus, “not in step” type manner.

Markets

The weekly general market is of a poor quality with the stalls appearing run-down and lacking any real integration with the rest of the town centre offer. The range and quality of the goods is poor with no overt presence of locally grown produce. The market seems to operate within its own rules and there appears to be a weakening customer base due to variable opening and closing times. Whilst the site of the market is well placed, there is anecdotal evidence that some retailers do not see the economic value it brings to the town centre and the wider economy. There is a need to enhance and consolidate the current market before any future growth and extension into the town centre. The farmers market is reported to have a positive impact on town centre business and is growing as a key showcase for over 25 local producers.

Customer Care

Barnard Castle has a great personality and culture within the town centre, due to the strong sense of pride that local people have. A warm welcome and good knowledge of products is apparent amongst retail staff, but there is a need for wider dissemination of best practise and for people becoming local ambassadors, sharing knowledge and techniques used to provide added value to shoppers and visitors.

Business Perspective

As in most rural market town communities, the relationship between the business community and the local authority can be testing due to differing needs priorities and timescales for action. Whilst retailers perceive Barnard Castle as a busy market town due to passing traffic and it acting as a through route to the A66 and beyond, visitors numbers are seen as declining by the retail sector, whilst the District has seen a positive up-turn in recent years with bed night stays increasing. However local demands on car parking are growing and a gradual “shaving off” of the local retail offer in terms of national and local shops and services has occurred over recent years. The need for better integration with other attractions such as the Bowes Museum and its events and festivals is required, so that the wider economic and social benefits are shared across the whole community and the town centre is weaved into the distinctive town appeal. Local businesses have identified the existence of a fragmented business and town centre delivery service with the need for a more co-ordinated and clearer protocol for engagement and support from current providers.

Next Steps

The survey stage of the Market Towns Retail Distinctiveness project is complete and provides a comprehensive assessment of where Barnard Castle is in relation to its level of retail distinctiveness. The next steps in the project process are identified below:

- To understand the key strengths of Barnard Castle town centre and how these can be maintained
- To identify where Barnard Castle town centre needs support and investment
- To identify any generic issues or themes that impact across all three of the pilot towns and whether these are endemic of market towns in the United Kingdom
- To develop a set of action plans that address opportunities and weaknesses within each of the pilot towns that meets local needs, is meaningful and realistic and develops stronger and sustainable local economies.

To reach this next stage of the project, the approach and level of engagement is significantly important if the final action plans and toolkit are to achieve benefits for all, and are owned by regional and local partners. The next stage will therefore involve an action planning workshop day for each of the pilot towns that will provide opportunities for local stakeholders, the business sector and the wider community to find out about the key findings from the survey stage and to help shape the emerging action plan.

The action planning days will be organised around a series of structured presentations for local partners during the lunchtime and evening and an open, drop-in surgery type session held throughout the day. In addition to face to face contributions, opportunities to make comments through email, the project web-site and through other channels will be made possible. A report of consultation will be issued to the client and steering group, which will be fed into the final action plan documents towards the end of the project process. It is clear from the survey stage, that many of the actions will not be purely physical interventions but will be based around the organisation, networking and development of town centres through an inclusive yet directed partnership approach.

