North Hertfordshire Retail Study Update 2016

North Herts District Council

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1.0 Introduction

Background and Study Objectives

1.1 Nathaniel Lichfield & Partners (NLP) was commissioned by North Hertfordshire District Council to prepare a Town Centre and Retail Study in 2009. The retail capacity projections have been regularly monitored and updated in 2011, 2012, 2013 and 2014. NLP has been commissioned to undertake a full update for 2016, based on new customer survey data.

1.2 The new town centre and retail study provides a more up to date position in relation to the potential growth of North Hertfordshire up to 2031. This study has been prepared in accordance with the requirements of the NPPF, and provides a future strategy for meeting additional town centre development floorspace requirements within towns, town centres and strategic housing allocations. The work undertaken is split into three specific parts:

- updating survey information;
- town centre health checks (Hitchin, Letchworth Garden City, Baldock and Royston); and
- review of strategy and the way forward.

Part 1 - Survey information

1.3 A household telephone survey (1,000 interviews) of residents living within the catchment area of the four towns in the District and on-street surveys of shoppers/visitors (600 interviews) within the four town centres has been undertaken. This survey information has informed the assumptions within the strategy, and provides up to date evidence on current shopping and leisure patterns.

Part 2 - Town centre health checks

1.4 Town Centre health checks were undertaken within the four centres in 2009. Additionally the Council has monitored these centres since 2004. New health checks have been carried out as part of this study. A qualitative analysis of the existing hierarchy of centres within the District and sub-region has also been carried out.

1.5 The analysis helps to measure the vitality and viability of each centre and establish the centres existing role.

Part 3 - Review of strategy

1.6 This study provides a fresh look at the town centre and retail environment in North Hertfordshire, including an assessment of the need for main town centre uses and the opportunities to meet these needs.

Report Structure

1.7 Section 2 of this report describes the shopping hierarchy. Section 3 outlines current retail trends and provides a district wide retail capacity and a retail need assessment. Section 4 assesses the scope for other town centre uses including food and beverage and commercial leisure uses. Section 5 explores opportunities for accommodating growth. Section 6 provides the recommendations and conclusions.

2.0 The Shopping Hierarchy

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in North Herts District and the surrounding sub-region.

Centres in North Hertfordshire and Surrounding Area

2.4 North Hertfordshire District is bounded by Central Beds, East Hertfordshire, Luton, South Cambridgeshire, Stevenage, St Albans, Uttlesford and Welwyn Hatfield. The District contains four main town centres, Hitchin, Letchworth Garden City, Royston and Baldock. These centres compete with each other, and also centres within surrounding authority areas.

2.5 The Javelin Group's publishes a UK Shopping venues ranking called VENUESCORE, which provides a straight forward toll for comparing shopping destinations. VENUESCORE ranks the UK's top 3,000 retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. The results for North Hertfordshire and other selected centres are shown in Table 2.1. Each destination is given a weighted score for the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiplies. The score attributed to each retailer is weighted depending on their overall impact on shopping patterns, for example a large department store will achieve a high score. The VENUESCORE data for more centres in the sub-region is also shown on Figure 2.2.

2.6 In general the VENUESCORE closely correlates to the actual market size of the shopping destination in terms of consumer expenditure. VENUESCORE also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale). The market positon relates specifically to the fashion offer together with other easily classifiable operators.

2.7 Cambridge is a top tier centre and is the only “upscale” centre in the sub-region, which suggests it has an excellent and high quality comparison retail offer, comparable with other top destinations across the country. Milton Keynes is also a top tier centre, with a slightly lower market position “upper middle” compared with Cambridge’s “upscale” position. St Albans is a second tier centre relatively high in the rankings, at a slightly lower market position than Cambridge i.e. “upper middle”. Luton and Bedford are second tier centres relatively high in the rankings, but at a lower market position “middle”, which suggests these centres have more comparison multiples than St Albans, but the retail offer is generally more mid-market.

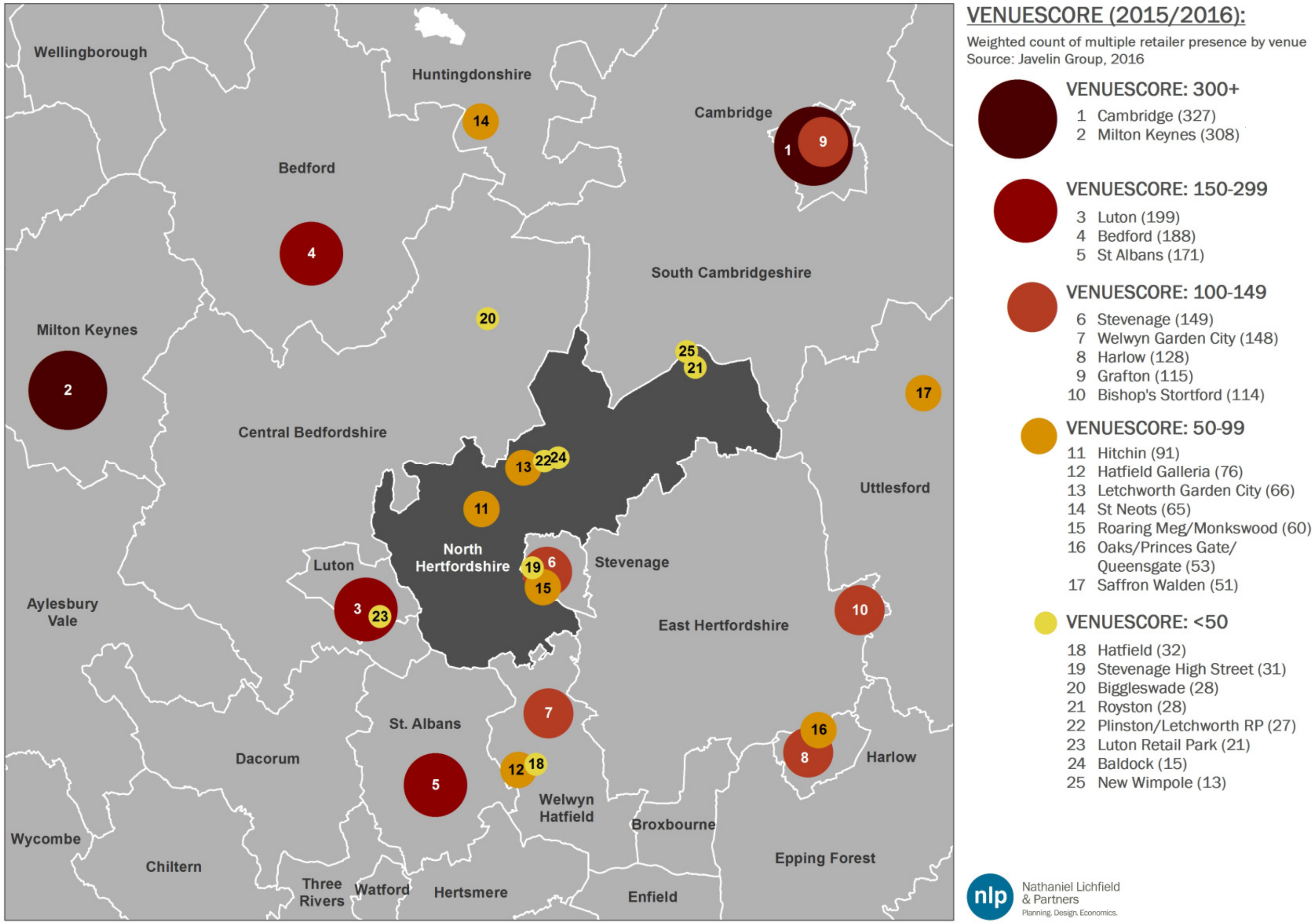
Table 2.1 VENUSCORE UK Shopping Index

Centre	UK Rank	VENUESCORE	Market Position
Cambridge	26	327	Upscale
Milton Keynes	34	308	Upper Middle
Luton	91	199	Middle
Bedford	100	188	Middle
St Albans	125	171	Upper Middle
Stevenage	157	149	Lower Middle
Welwyn GC	160	148	Middle
Harlow	193	128	Lower Middle
Cambridge - Grafton	222	115	Middle
Bishop's Stortford	224	114	Middle
Hitchin	**297**	**91**	**Middle**
Hertford	354	79	Middle
Hatfield Galleria	100	76	Upper Middle
Letchworth GC	**435**	**66**	**Lower Middle**
St Neots	445	65	Middle
Saffron Walden	600	51	Middle
Hatfield	1,003	32	Lower Middle
High St - Stevenage	1,047	31	Middle
Biggleswade	1,151	28	Lower Middle
Royston	**1,151**	**28**	**Middle**
Baldock	**2,034**	**15**	**Lower Middle**

Source: VENUESCORE, Javelin Group 2015/16

2.8 Most of the centres within the sub-region, including the four main centres in North Hertfordshire, are “middle” or “lower middle” in terms of market position. Hitchin is ranked higher than Letchworth Garden City and has a higher market position i.e. “middle” compared with “lower middle”. Both centres are ranked significantly below Stevenage and Welwyn Garden City, but Hitchin has a higher market position than Stevenage. Hitchin and Letchworth Garden City are third tier centres within the hierarchy.

Figure 2.1 North Hertfordshire Shopping Hierarchy – VENUESCORE



Source: Javelin Group 2015/16

2.9 Royston and Baldock are much smaller centres fourth tier centres, with relatively low scores. These centres have a smaller number of multiple retailers overall. Royston has a much lower VENUESCORE than Letchworth Garden City (28 compared with 66), but has a slightly higher market position (middle compared with lower middle), which suggests Royston has less multiple comparison retailers, but a higher proportion of the fashion retailers present are classified as having a higher market position, rather than discount/value end of the market

2.10 Figure 2.1 indicates that residents in North Hertfordshire District have good access to a number of large centres, as well as having a choice of smaller centres for day to day shopping needs. The outflow of retail expenditure from the District, particularly comparison goods, is significant and this is likely to remain high in the future.

2.11 In addition to VENUESCORE and market position, each destination is assessed in terms of a range of other attributes, as follows:

- Age focus (is the offer targeting younger or older consumers?)
- *Fashionability* of its offer (is the clothing offer traditional or progressive?)
- Food/service bias (how strong is the food and beverage offer?)

2.12 The Javelin Group classifies retailers in terms of their "fashionability" ranging from "traditional" at one end, the "updated classic", "fashion moderate", "fashion forward" through to "progressive" at the other, i.e. least fashionable to the most fashionable. Shopping destinations in London dominate the most "progressive" venues, such as Carnaby Street and Bond Street.

2.13 The age positon of the fashion offer is also classified ranging from "young", "middle" to "old", for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and others such as Evans and Edinburgh Woollen Mill appealing more to the old.

2.14 The results for the four main centres in North Hertfordshire are shown in Table 2.2.

Table 2.2 Centre Attributes

Centre	Age	Fashion Position	Food/Service Index (ave. =100)
Hitchin	Old	Traditional	140
Letchworth GC	Old	Updated	101
Royston	Old	Moderate	65
Baldock	Old	Moderate	n/a *

Source: Javelin Group 2015/16 * Food/Service index not provided for smaller centres

2.15 The centres tend to cater for older customers with moderate or traditional tastes. Letchworth Garden City is the most fashion progressive but still caters predominantly for older customers.

2.16 Hitchin has a particularly strong food and beverage offer. Unfortunately Javelin does not provide a food/service score for Baldock. Baldock's food and beverage is accessed in the health check for the centre in Appendix 5.

Existing Retail Provision in North Hertfordshire

2.17 An assessment of the existing retail and service provision in the main centres is provided in the centre health checks included at Appendix 5. A summary of existing retail provision in provided in Table 2.3 below.

Table 2.3 Existing Class A Retail Provision in North Hertfordshire

Centre	Number Shop Units*	Convenience Floorspace (sq.m gross)	Comparison Floorspace (sq.m gross)	Food and Beverage (sq.m gross)
Hitchin	359	9,960	30,250	10,216
Letchworth Garden City	251	11,220	16,150	5,320
Baldock	92	10,920	4,530	6,460
Royston	162	2,080	6,327	6,941
Large out of centre stores	13	19,109	9,342	-
Total	**877**	**53,289**	**66,599**	**28,939**

Sources: North Hertfordshire Council April 2015, VOA, StorePoint * Class A1-A5 including vacant units

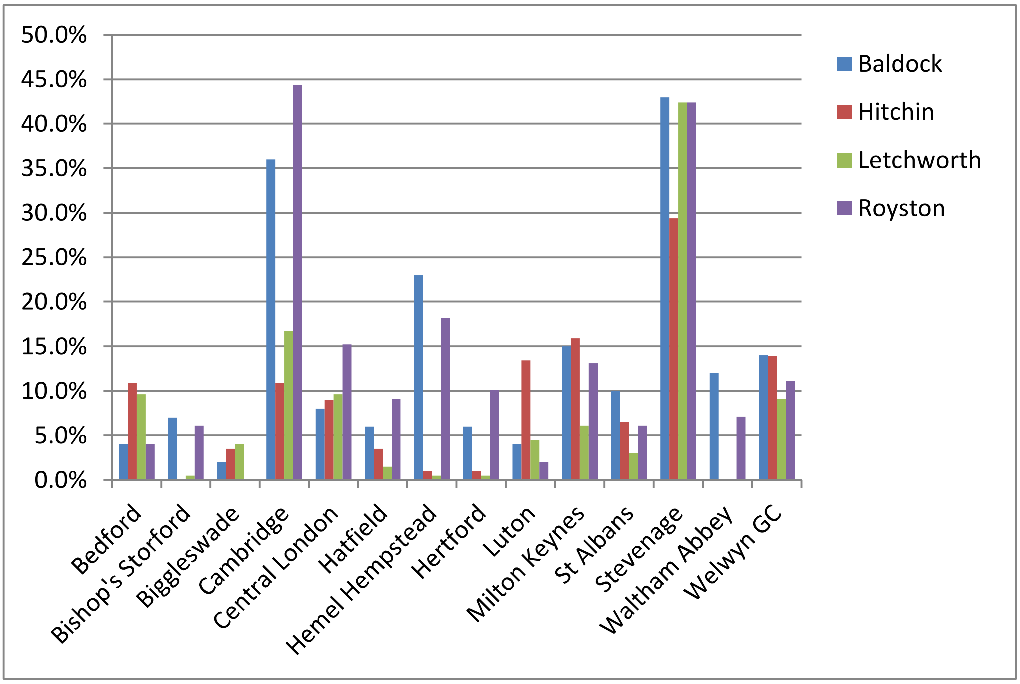
2.18 A more detailed breakdown of the existing retail floorspace is provided in the capacity assessment in Appendix 2, 3 and 4. Table 2.3 and the town centre health checks confirm that Hitchin and Letchworth Garden City are the main comparison goods shopping destinations within the District. However all four centres cater for food and grocery shopping and food/beverage needs.

2.19 Hitchin and Letchworth Garden City provide a reasonable range of shops and facilities that serve their settlements and nearby villages. They have a critical mass of convenience and comparison shopping floorspace and a good range of non-retail services. Nevertheless both centres fall within the catchment areas of larger centres, in particular Stevenage town centre and the large retail parks in Stevenage.

2.20 Baldock and Royston are smaller centres that serve their respective settlements and smaller catchment areas, providing a more limited range of shops and non-retail services.

2.21 The in-street survey results indicate that customers within the four main centres regularly shop at other centres outside the District, as shown in Figure 2.2. This graph shows Cambridge and Stevenage (including retail parks) have a particularly strong draw. Customers have a wide choice of destinations and shop in more than one centre.

Figure 2.2 Other Shopping Destinations Regularly Used by Visitors (% of all visitors)



Source: NEMS In-Street Survey 2016

2.22 National and local policy indicates that it is important for the District's town centres to maintain and strengthen their role in the retail hierarchy. The smaller centres should continue to perform a more local function meeting day to day shopping and service needs.

3.0 Retail Need Assessment

Introduction

3.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

3.2 The Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in North Hertfordshire District in the period from 2016 to 2031. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health centres in Appendix 5.

Study Area

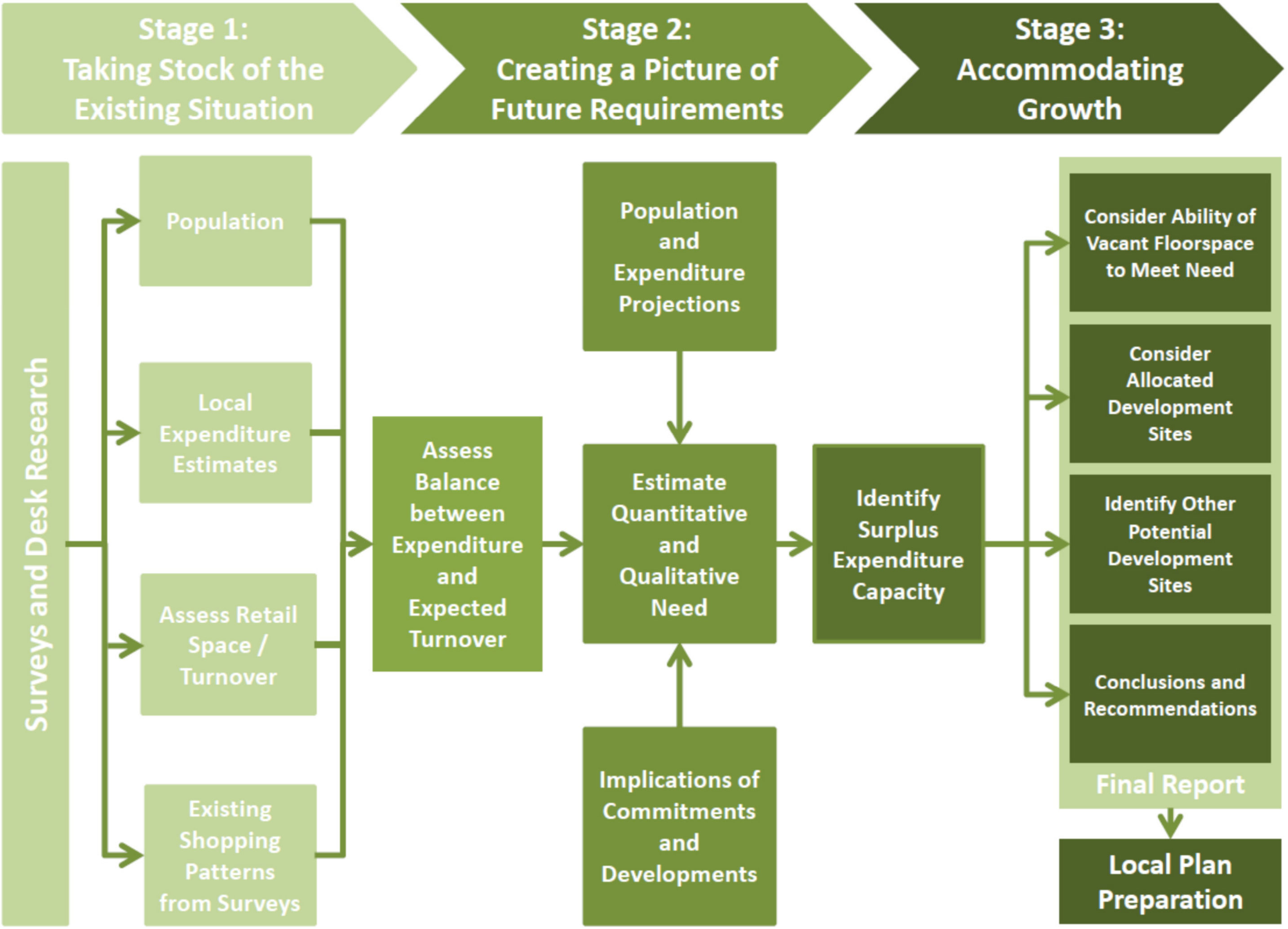
3.5 The quantitative analysis is based on the defined study area, as adopted in the 2009 study, which covers the catchment areas of the main shopping destinations in the District.

3.6 The Study Area is sub-divided into 7 zones as shown in Appendix 1. The survey zones are based on postcode areas, and take into consideration the extent of the primary catchment areas of the four main town centres i.e. Hitchin, Letchworth Garden City, Royston and Baldock.

3.7 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area zones to centres outside, but conversely expenditure inflow from surrounding areas.

3.8 The methodology is summarised in Figure 3.1 overleaf and set out in more detail in Appendix 1.

Figure 3.1: Methodology for Estimating Future Requirements for Retail Floorspace



Retail Trends

3.9 This section considers the changes in the retail sector nationally and the potential implications for North Hertfordshire District.

3.10 The economic downturn had a significant impact on the retail sector. A large number of national operators failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. BHS and Austin Reed are the latest operators experiencing difficulties, which suggest market conditions are still challenging. Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators was affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

3.11 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2016 to 2020). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national tends within the retail sector is set out below.

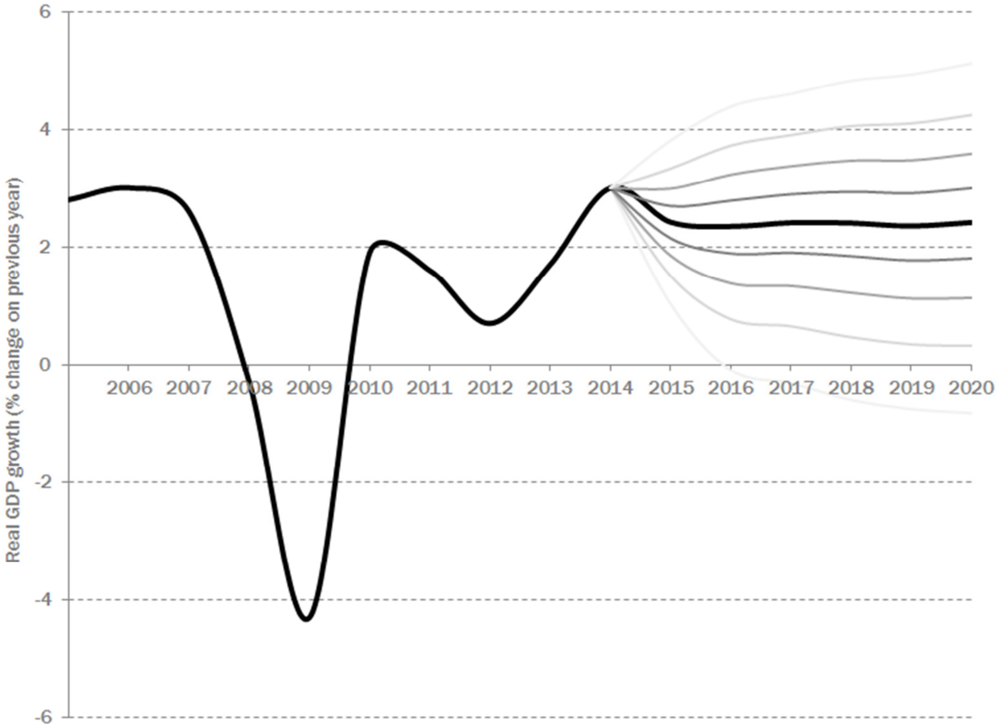
Expenditure Growth

3.12 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.13 Figure 3.2 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014. The OBR forecasts that growth will be slightly above 2% per year from 2015 onwards.

3.14 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. These national trends are anticipated to be mirrored in North Hertfordshire.

Figure 3.2 Forecast GDP Growth to 2020



Source: ONS, OBR

3.15 For convenience goods, Experian anticipates limited growth (0.1% per annum). For comparison goods, higher levels of growth are expected in the future (3% per annum), still at a lower rate than previous pre-recession trends. Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.

3.16 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to about 14% in 2012. Vacancy rates have recovered to 11.8% in 2015.

3.17 There were 111 vacant Class A shop units within the four main centres in North Hertfordshire in 2009, an overall vacancy rate of 12.7%, which was slightly higher than the Goad national average at that time (11.4%). The current vacancy rate recorded in 2015 has improved marginally to 11.1%, which is now slightly below the 2015 national average of 11.8%.

3.18 Hitchin (5.6%) and Baldock (6.5%) have vacancy rates significantly below the national average (11.4%), but Letchworth Garden City (18.7%) and Royston (14.2%) are under-performing in terms of vacancy rates. These figures suggest that during the recession, Hitchin and Baldock have recovered at a much faster rate than the national average, whilst Letchworth Garden City and Royston have experience an increase in vacancy rates.

New Forms of Retailing

3.19 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within North Hertfordshire.

3.20 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 13 (October 2015) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for over a tenth of total retail sales…

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2015 against 4.7% in June 2008...

…non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 57.3 million internet users in the UK (representing 88.4% of the population) in mid-year 2014 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.8% by 2020 rising to 19.6% by the mid-2030s."

3.21 This retail update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.22 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.23 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

3.24 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade. This trend has been evident in North Hertfordshire, with a number of smaller local convenience stores operated by the main food store retailers.

3.25 A number of proposed larger food stores have not been implemented across the country. Tesco has not implemented their proposed store extension at Baldock, and this may be evidence of this national trend, and the move away from larger stores to smaller formats.

3.26 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is less evident in North Hertfordshire, although there is a Lidl store in Letchworth, which has recently expanded. The discount sector is actively expanding and may look for opportunities in North Hertfordshire in the future.

3.27 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.28 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak during and after the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. The retail warehouse sector is represented primarily in Letchworth, but has not expanded in recent years. Some bulky goods retail warehouses have closed and have been re-occupied by other non-bulky retailing i.e. Family Bargains.

3.29 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. In many centres, charity shops have occupied vacated shop premises during the recession. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.

3.30 This trend is not particularly evident in North Hertfordshire. Charity shops account for 5.7% of all comparison shops within the four main centres, compared with the national average of 8.4%.

3.31 The discount comparison sector has also grown significantly in recent years. This sector is represented in Hitchin and Letchworth e.g. Poundland stores.

3.32 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres. Whilst represented, this growth trend is not particularly evident in North Hertfordshire.

3.33 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, e.g. Cambridge and Milton Keynes. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping. Comparison goods shopping has declined in many smaller centres and this trend is evident in North Hertfordshire.

3.34 The continuation of these trends will influence future operator requirements in North Hertfordshire with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

3.35 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is higher i.e. Hitchin. It is unlikely these changes will have a significant impact on North Hertfordshire, because the centres already have a broad mix of retail and non-retail uses. It may help to reduce vacancy rates, particularly in Letchworth Garden City and Royston, where vacancy rates are higher.

3.36 These trends are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.37 Shopping behaviour will continue to change and the high street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

Population and Expenditure

3.38 The District's projected population for 2011 to 2031 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected to 2031 based on the North Hertfordshire Strategic Housing Market Appraisal (see notes to Table 1 in Appendix 2) and the Office of National Statistics sub-national projections 2014 for parts of the study area outside the District.

3.39 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2031. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

3.40 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 11% from £518.25 million in 2016 to £603.26 million in 2031, as shown in Table 3 (Appendix 2).

3.41 Comparison goods spending is forecast to double between 2016 and 2031, increasing from £831.12 million in 2016 to £1,532.2 million in 2031, as shown in Table 3 (Appendix 3).

3.42 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

3.43 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2016

3.44 Existing convenience goods retail sales floorspace within North Hertfordshire District is just over 28,500 sq.m net, as set out in Table 9 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores.

3.45 Comparison goods retail floorspace (including comparison sales in large food stores) within North Hertfordshire District is estimated to be around 53,700 sq.m net, as shown in Table 9 in Appendix 3.

Existing Spending Patterns 2016

3.46 The results of the household shopper questionnaire survey undertaken by NEMS in February 2016 have been used to estimate existing shopping patterns within the study area zones. The results are shown in Appendix 6.

Convenience Shopping

3.47 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top up shopping.

3.48 A summary of food and grocery shopping patterns for main food shopping trips for selected stores only is shown in Table 3.1. Results are provided for the four core zones and the study area as a whole (see total column).

Table 3.1 Main Food and Grocery Last Trip (main destinations mentioned by respondents)

Destination	% Market Share in each Zone				
	1 Hitchin	2 Letchworth	3 Baldock	4 Royston	SA Total
Sainsbury's Hitchin	41.6	-	-	-	**8.6**
Waitrose Hitchin	20.1	3.2	3.0	0.5	**5.9**
Asda Hitchin	7.9	-	-	-	**1.6**
Morrison's Letchworth	5.8	39.3	2.9	-	**7.9**
Sainsbury's Letchworth	9.4	25.4	10.6	5.5	**8.3**
Lidl Letchworth	2.3	10.7	13.1	1.2	**3.5**
Morrison's Royston	-	-	-	6.1	**1.2**
Tesco Royston	-	-	1.1	49.7	**9.6**
Tesco Express Royston	-	-	-	7.7	**1.5**
Tesco Extra Baldock	0.9	10.8	47.3	1.7	**6.5**
Sainsbury's Stevenage	4.6	4.3	-	-	**2.3**
Sainsbury's Biggleswade	-	-	3.4	0.4	**1.9**
Tesco Stevenage	1.6	-	-	-	**3.4**
Waitrose Cambridge	-	-	-	7.6	**1.5**
Waitrose Welwyn GC	-	-	1.2	-	**1.2**
Co-op Buntingford	-	-	-	1.9	**0.4**
Sainsbury's Buntingford	-	-	-	0.9	**0.2**
Internet	1.4	3.9	7.9	11.5	**6.7**

Source: NEMS Household Survey February 2016

3.49 The survey results indicate there is a good retention of main food and grocery shopping trips within the each town. There are cross flows of main food shopping trips to and from Hitchin, Letchworth Garden City and Baldock, but the overall trip retention is high. There is a limited amount of leakage to large food stores in Stevenage, Biggleswade and Welwyn.

3.50 The cross flows of main food shopping trips to and from Royston and the three other towns is more limited, due to the travel distances involved. Trip retention is relatively high in Royston with some leakage to stores in Cambridge and

Buntingford. Home delivery is higher in the Royston zone followed by Baldock which may be due to the more remote rural settlements in these zones and the presence of large Tesco store providing a home delivery service.

3.51 Table 4 (Appendix 2) indicates the proportion of total convenience goods expenditure (main and top up trips) within each zone attracted to each destination.

3.52 Hitchin retains 71.4% of expenditure within its respective zone and Letchworth retains 82.2%. Most of the leakage from Hitchin is attracted to Stevenage and most of the leakage from Letchworth is attracted to Tesco Extra at Baldock.

3.53 Baldock retains a lower proportion (52.6%), with 31.2% attracted to Letchworth Garden City. Royston retains 64.8%, but this figure relates to an extensive rural zone. The catchment area of food stores in Cambridge and Buntingford also have a reasonable draw from the Royston zone.

3.54 On balance there appears to be limited potential to increase North Hertfordshire's market share of convenience goods expenditure within the study area. The future strategy should seek to maintain current market shares.

3.55 The level of convenience goods expenditure attracted to shops/stores in North Hertfordshire District in 2016 is estimated to be £314.95 million as shown in Table 5, Appendix 2, or £305.17 million excluding local shops outside the four main towns. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4.

3.56 The total benchmark turnover of identified existing convenience sales floorspace within North Hertfordshire District is £278.14 million (Table 9, Appendix 2).

3.57 These figures suggest that convenience goods retail sales floorspace in the District is collectively trading 9.7% above the national average. Facilities appear to be trading particularly well in Royston at 19% above average, and to a lesser extent Hitchin (15%).

3.58 The estimate of global expenditure surplus (£27.03 million) within North Hertfordshire District as a whole, i.e. the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities, is relatively insignificant and does not suggests facilities are over-trading to an extent that there is unacceptable in-store congestion.

Comparison Shopping

3.59 A summary of comparison goods shopping patterns is shown in Table 3.2. Results are provided for the four core zones and the study area as a whole.

3.60 The results indicate that the retention of comparison good shopping trips is generally lower than for convenience good shopping. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more range and choice of shops. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region.

3.61 Hitchin is the main comparison shopping destination with 15.1% of all respondents across the study area as a whole indicating they do most of their non-food shopping in Hitchin, compared with 10.6% in Letchworth, 4.5% in Royston and 1.2% in Baldock.

Table 3.2 Non-Food Shopping (main destination used by respondents)

Destination	% Market Share in each Zone				
	1 Hitchin	2 Letchworth	3 Baldock	4 Royston	SA TOTAL
Hitchin	44.1	10.7	9.3	0.9	**15.1**
Letchworth GC	5.7	39.5	21.1	2.8	**10.6**
Royston	-	-	0.6	23.5	**4.5**
Baldock	-	-	12.8	1.9	**1.2**
Biggleswade	0.4	0.8	7.6	0.9	**2.0**
Buntingford	-	-	-	0.5	**0.1**
Cambridge	1.2	3.6	9.4	55.8	**12.2**
Central London	4.5	-	0.6	-	**1.4**
Luton	0.9	0.8	-	-	**5.6**
Milton Keynes	0.4	1.5	-	0.4	**3.3**
Stevenage	22.4	21.9	12.9	3.6	**15.2**
Welwyn GC	7.2	9.4	11.1	-	**9.3**
Internet	4.8	6.9	6.0	6.1	**6.2**

Source: NEMS Household Survey June 2015

3.62 Table 4 (Appendix 3) sets out the proportion of comparison goods expenditure within each zone that is spent within North Hertfordshire District. Stevenage and to a lesser extent Welwyn, attract a significant number of customers from the Hitchin, Letchworth and Baldock zones. Cambridge has a significant draw from the Royston zone.

3.63 The estimated comparison goods expenditure currently attracted by shopping facilities within North Hertfordshire District is £288.83 million in 2016, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the District area. The average sales density for existing comparison goods sales floorspace in the main centres in the District (53,687 sq.m net) is £5,261 per sq.m net, as shown in Table 3.3. The comparable figure in the 2009 study was £5,017 per sq.m net (price adjusted), which suggests sales densities have grown in real terms by a modest 4.9% between 2009 and 2016.

3.64 Based on our recent experience across the country average sales densities for comparison floorspace usually range from £4,000 to £8,000 per sq.m net. The higher end of this range is usually only achieved by very successful shopping centres, which reflects the higher proportion of quality multiple retailers.

Table 3.3: Comparison Goods Average Sales Densities

Centre	Average Sales Density 2016 (£ per sq.m net)
Hitchin	£5,087
Letchworth Garden City	£5,176
Royston	£8,355
Baldock	£3,081
Average	**£5,261**

3.65 Table 3.3 indicates that trading levels amongst comparison facilities in North Hertfordshire vary significantly between the four towns. The average sales density figures should be viewed in the context of the type of floorspace in each town. Comparison facilities in Hitchin and Letchworth Garden City are trading at a similar average sales density, below the middle of the typical range highlighted above. Hitchin and Letchworth's figures reflect a mix of high streets and large format store facilities.

3.66 The Baldock figure includes the large element of comparison sales within the Tesco Extra store. The household survey results may not fully reflect comparison good expenditure attracted to this Tesco store, i.e. expenditure during linked food and grocery shopping trips.

3.67 The Royston average sales density is relatively high because the town predominantly has high street shop units with small sales areas.

3.68 Overall trading levels are reasonable across the District. There is no evidence to suggest existing comparison sales floorspace is under or over-trading, or that there is surplus comparison expenditure available to support new development at present. Existing floorspace appears to be trading satisfactorily in difficult market conditions.

Capacity for Convenience Goods Floorspace

3.69 Given the relatively high expenditure retention rates, it is appropriate and realistic to plan to maintain the District's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents.

3.70 Separate market shares have been adopted for urban extensions to the north of Letchworth Garden City, Baldock, Stevenage/Knebworth and also east of Luton, on the basis that these developments include local shopping provision to meet the day to day needs of residents within the development. Future market shares are shown in Table 6 in Appendix 2.

3.71 Based on the market shares in Table 6, the future level of available convenience goods expenditure at 2021, 2026 and 2031 is shown at Tables 7, 8 and 9 in Appendix 2.

3.72 The total level of convenience goods expenditure available for shops in the District between 2016 and 2031 is summarised in Table 11 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £314.95 million in 2016 to £360.57 million in 2031.

3.73 Table 11 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is an existing expenditure surplus of £27.03 million convenience goods expenditure. This surplus will increase to £39.01 million by 2021. Continued future growth produces a surplus of £57.46 million in 2026, increasing to £72.65 million in 2031.

3.74 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 12. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £12,095 per sq.m. This figure is based on the average turnover of the main food supermarket operators (Asda, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provide by main operators rather than small independent convenience shops.

3.75 The short term capacity figures up to 2021 suggest surplus of available convenience goods expenditure could support a small amount of additional floorspace, 3,225 sq.m net (4,607 sq.m gross). .

3.76 In the long term, surplus expenditure at 2031 could support 6,007 sq.m net of sales floorspace (8,581 sq.m gross) in the District as a whole, as shown in Table 12, Appendix 2.

Previous Retail Floorspace Projections 2009 and 2013

3.77 The 2009 retail study provided projections up to 2021 and 2026. The 2013 update of the 2009 study also provided projections for 2031. Convenience goods floorspace projections (net sales) are compared in Table 3.4.

Table 3.4 North Hertfordshire District Wide Convenience Goods Floorspace Projections

Retail Study	Convenience Goods Floorspace Net Sales Sq.M		
	2021	2026	2031
2009 Study	4,782	6,998	-
2013 Update*	1,440	3,263	5,196
2016 Study	3,225	4,751	6,007

Source: NLP retail studies for North Hertfordshire *revised to exclude Tesco extension in Baldock

3.78 The floorspace projections were higher in 2009. The main reasons for this reduction are set out below.

1 Convenience expenditure was projected to increase by 2.6% between 2007 and 2014, however allowing for inflation, expenditure actually reduced by about 15% during this period due to the recession.

2 An annual future growth rate of 0.7% was adopted up to 2026. Experian's latest recommended growth rate is only 0.1% per annum.

3 As a result of the above, expenditure per capita projections in 2009 (taking into account inflation) were 17% higher for 2021 and 19% higher for 2026. NB - some of the reduction in expenditure growth has been offset by reductions in the average sales density of food store operators.

Capacity for Comparison Goods Floorspace

3.79 The household survey suggests that the District's retention of comparison goods expenditure is generally lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in nearby authorities, in particular Stevenage, Welwyn Hatfield and Cambridge.

3.80 Future improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the District. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the District to increase their market share of expenditure. In particular town centre regeneration proposals in Stevenage and Hatfield may draw additional trade from North Hertfordshire depending on the scale and quality of shops, services and leisure facilities that are actually implemented. It is unlikely expenditure leakage to these towns will increase significantly. Nevertheless the environmental improvements within these regeneration projects should improve the relative attraction of these towns. On this basis, floorspace capacity projections within this study assume constant market shares, with improvements in North Hertfordshire counter-balanced by improvements in surrounding authorities.

3.81 Some retail development will be necessary in North Hertfordshire District in order to prevent market shares falling significantly in the future. An appropriate strategy for North Hertfordshire District should seek to prevent market shares falling significantly, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

3.82 The Council should plan to protect the existing role of centres, recognising these centres fall within the catchment area of higher order regional and sub-regional centres. The centres in North Hertfordshire District will maintain an important role in providing a range and choice of shopping facilities that are locally accessible. Residents in North Hertfordshire should not be expected to travel to larger centres further afield for all forms of shopping.

3.83 Available comparison goods expenditure has been projected forward to 2021, 2026 and 2031 in Tables 7, 8 and 9 in Appendix 3, and summarised in Table 11. Available comparison expenditure to facilities within the District is expected to increase from £288.83 million in 2016 to £525.03 million in 2031.

3.84 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2016 (i.e. satisfactory levels), as shown in Table 10 (Appendix 3). Current trading levels are considered to be satisfactory. Table 11 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian (Retail Planner Briefing Note 13 – October 2015). Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

3.85 By 2021 within North Hertfordshire District as a whole there will be an expenditure surplus of £23.41 million. By 2026, future expenditure growth generates an expenditure surplus of £73.7 million, which will grow to £136.3 million by 2031.

3.86 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 12 in Appendix 3, adopting an average sales density of £6,000 per sq.m in 2016, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2021 could support 3,534 sq.m net of sales floorspace (4,713 sq.m gross). This represents a 5% increase in sales floorspace across the District.

3.87 In the long term, surplus expenditure at 2031 could support 16,879 sq.m net of sales floorspace (22,505 sq.m gross) in the District as a whole, as shown in Table 12, Appendix 3.

Previous Retail Floorspace Projections 2009 and 2013

3.88 Comparison goods floorspace projections (net sales) produced within previous studies and this report are compared in Table 3.5.

Table 3.4 North Hertfordshire District Wide Comparison Goods Floorspace Projections

Retail Study	Comparison Goods Floorspace Net Sales Sq.M		
	2021	2026	2031
2009 Study	21,801	36,269	-
2013 Update*	3,698	8,564	13,849
2016 Study	3,534	10,0767	16,879

Source: NLP retail studies for North Hertfordshire *revised to exclude Tesco extension in Baldock

3.89 The floorspace projections were significantly higher in 2009. The main reasons for this reduction are set out below.

- Experian's local expenditure estimate for the study area at 2016 is 6% lower than previously projected in 2009, due to the effects of the recession.

- Future comparison expenditure was projected to increase by 4.6% per annum between 2016 and 2026. Experian's latest recommended growth rate is only 3% per annum.
- The deduction for special forms of trading was only 8.9% in 2009. Experian's latest forecast for 2021 and 2026 is 15%.
- As a result of the above, expenditure per capita projections in 2009 were 21% higher for 2021 and 29% higher for 2026 then the current 2016 study.

Qualitative Need for Retail Floorspace

3.90 Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Convenience Goods Shopping

3.91 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that over 86% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

3.92 The capacity projections in this section suggest there is scope for additional convenience retail floorspace within North Hertfordshire District. The potential level of surplus expenditure available within the District at 2016 is estimated to be £27 million, which could support 2,235 sq.m net of new sales floorspace. This floorspace projection does not include the potential sale of comparison goods within proposed food stores. Most of this surplus expenditure relates to Hitchin (£11.4 million) and Royston (£11.4 million).

Hitchin

3.93 The range and choice of goods available within the Waitrose and Sainsbury stores in Hitchin are satisfactory. These two large stores are supported by Marks & Spencer Simply Food, Asda, Tesco Express and Iceland. Only 5 respondents in the household shopper survey (0.5% of the total) suggested more food supermarkets would make them shop more often in Hitchin.

3.94 The in-street survey results indicated that over 72% of visitors rated the size and quality of supermarkets in Hitchin as “quite good” or “very good”, compared with only 7.5% “quite poor” or “very poor”. Only 2% of in-street visitors suggested an improvement to food store provision.

3.95 Residents in Hitchin also have access to food stores in Letchworth, and the cross flow of expenditure suggested by the household survey results support this.

3.96 There is no obvious qualitative deficiency in food store provision in Hitchin.

Letchworth Garden City

3.97 The range and choice of goods available within the Sainsbury and Morrison’s stores in Letchworth Garden City is good. These two large stores are supported by Iceland and Lidl and a number of smaller convenience stores. Only 11 respondents in the household shopper survey (1.1% of the total) suggested more food supermarkets would make them shop more often in Letchworth Garden City.

3.98 The in-street survey results indicated that nearly 78% of visitors rated the size and quality of supermarkets in Letchworth Garden City as “quite good” or “very good”, compared with only 8% “quite poor” or “very poor”. Less than 1% of in-street visitors suggested an improvement to food store provision.

3.99 Residents in Letchworth Garden City also have access to food stores in Hitchin and Baldock, and the cross flow of expenditure suggested by the household survey results support this.

3.100 There is no obvious qualitative deficiency in food store provision in Letchworth Garden City.

Royston

3.101 The range and choice of goods available within the Tesco store in Royston is good. This store is supported by Morrison’s and Tesco Express stores. Tesco is the main food superstore in Royston. Morrison’s is a much smaller store. Proposals for a new Waitrose, if implemented, will help to improve choice and absorb surplus expenditure capacity in Royston.

3.102 Only 13 respondents in the household shopper survey (1.3% of the total) suggested more food supermarkets would make them shop more often in Royston.

3.103 The in-street survey results indicated that nearly 62% of visitors rated the size and quality of supermarkets in Royston as “quite good” or “very good”, compared with 17% “quite poor” or “very poor”. Royston has the lowest level of satisfaction with food store provision. Only 1% of in-street visitors suggested an improvement to food store provision.

3.104 In qualitative terms food store provision could be improved in Royston, through increased competition and choice.

Baldock

3.105 Tesco Extra dominates food and grocery provision in Baldock. Only 9 respondents in the household shopper survey (0.9% of the total) suggested more food supermarkets would make them shop more often in Baldock.

3.106 The in-street survey results indicated that 65% of visitors rated the size and quality of supermarkets in Baldock as “quite good” or “very good”, compared with only 4% “quite poor” or “very poor”. Only 1% of in-street visitors suggested an improvement to food store provision.

3.107 Residents in Baldock also have access to food stores in Letchworth Garden City, and the cross flow of expenditure suggested by the household survey results support this.

3.108 There is no obvious qualitative deficiency in food store provision in Baldock.

High Street Comparison Shopping

3.109 As indicated in Section 2, Hitchin and Letchworth Garden City are third tier centres within the hierarchy. Their market positon is “middle” and “lower middle” in terms of market position. Hitchin is ranked higher than Letchworth Garden City and has a higher market position i.e. “middle” compared “lower middle”. Both centres are ranked significantly below Stevenage and Welwyn, but Hitchin has a higher market position than Stevenage.

3.110 Royston and Baldock are much smaller centres fourth tier centres, with a relatively low VENUESCORE. These centres have a smaller number of multiple retailers.

3.111 The centre health checks in Appendix 5 indicate that Hitchin and Letchworth Garden City have a reasonable proportion of comparison retail units compared with the national average. Hitchin and Letchworth Garden City have a reasonable selection of national multiples, complemented by a range of independent traders. Comparison retailers in Royston and Baldock are predominantly small independent traders.

Hitchin Town Centre

3.112 Hitchin is ranked higher than Letchworth Garden City in VENUESCORE’s national rank, because it has more national multiples. Hitchin town centres is also larger in terms of comparison floorspace (around 30,000 sq.m gross).

3.113 Hitchin has 153 comparison shops and has representation in most comparison goods categories, but there is generally a limited choice of outlets within some specialist categories.

3.114 In total 50 respondents in the household shopper survey (5% of the total) suggested a better choice of clothing shops would make them shop more often in Hitchin. Other results were:

- better choice of shops in general (4.7%);
- better quality shops (1.9%);
- more large shops (2.3%);
- more independent shops (1.3%).

3.115 The in-street survey results indicated that nearly 76% of visitors rated the range of shops and services in Hitchin as “quite good” or “very good”, compared with only 11% “quite poor” or “very poor”. In addition 87% of visitors rated the quality of shops and services in Hitchin as “quite good” or “very good”, compared with only 5% “quite poor” or “very poor”.

3.116 In-street visitors were asked what improvements they would like to see, the key results relating to comparison shopping were:

- increased range of national/multiple chain stores (21.4%);
- increased range of local/speciality retailers (10.9%);
- improved quality of shops and services (5.5%); and
- improved outdoor market (10.4%).

3.117 These results suggest there is a reasonable degree of satisfaction with comparison goods shopping facilities in Hitchin, but there is scope for improvement that could help to attract more customers.

Letchworth Garden City Town Centre

3.118 Letchworth Garden City town centre is smaller than Hitchin in terms of the number of comparison shops (88) and comparison sales floorspace (around 16,000 sq.m gross) and VENUESCORE.

3.119 Letchworth Garden City also has representation in most comparison goods categories, but the choice of outlets is limited in each category.

3.120 In total 134 respondents in the household shopper survey (13.3% of the total) suggested a better choice of shops in general would make them shop more often in Letchworth Garden City. Other results were:

- better choice of clothing shops (6.2%);
- better quality shops (7.2%);
- more large shops (2.2%);
- more independent shops (0.9%).

3.121 The in-street survey results indicated that 49% of visitors rated the range of shops and services in Letchworth Garden City as “quite good” or “very good”, compared with nearly 34% “quite poor” or “very poor”. In addition 60% of visitors rated the quality of shops and services in Letchworth Garden City as "quite good" or "very good", compared with over 31% "quite poor" or "very poor".

3.122 In-street visitor's suggested improvements were:

- increased range of national/multiple chain stores (37.9%);
- increased range of local/speciality retailers (29.3%); and
- improved quality of shops and services (14.6%).

3.123 These results suggest there is a higher degree of dissatisfaction with comparison goods shopping facilities in Letchworth Garden City than in Hitchin, and there is scope for improvements that could help to attract more customers.

Royston Town Centre

3.124 Royston town centre is smaller than Hitchin and Letchworth in terms of the number of comparison shops (50) and comparison sales floorspace (around 6,000 sq.m gross). Royston has a limited choice of shops in comparison goods categories.

3.125 In total 109 respondents in the household shopper survey (10.8% of the total) suggested a better choice of shops in general would make them shop more often in Royston. Other results were:

- better choice of clothing shops (4.1%);
- better quality shops (2.8%);
- more large shops (1.4%);
- more independent shops (0.8%).

3.126 The in-street survey results indicated that 41% of visitors rated the range of shops and services in Royston as "quite good" or "very good", compared with 17% "quite poor" or "very poor". In addition 62% of visitors rated the quality of shops and services in Royston as "quite good" or "very good", compared with over 21% "quite poor" or "very poor".

3.127 In-street visitor's suggested improvements were:

- increased range of national/multiple chain stores (13.1%);
- increased range of local/speciality retailers (18.23%);
- improved quality of shops and services (5.1%); and
- improved outdoor market (14.1%).

3.128 These results suggest there is a higher degree of dissatisfaction with comparison goods shopping facilities in Royston than in Hitchin, but less dissatisfaction than in Letchworth Garden City. There is scope for improvements that could help to attract more customers.

Baldock Town Centre

3.129 Baldock is the smallest centre in terms of the number of comparison shops (24) and comparison sales floorspace (around 4,500 sq.m gross). The range and choice of comparison goods shops is limited.

3.130 In total 136 respondents in the household shopper survey (13.6% of the total) suggested a better choice of shops in general would make them shop more often in Baldock. Other results were:

- better choice of clothing shops (3.6%);
- better quality shops (2.1%);
- more large shops (2.2%);
- more independent shops (1.4%).

3.131 The in-street survey results indicated that 63% of visitors rated the range of shops and services in Baldock as “quite good” or “very good”, compared with nearly 18% “quite poor” or “very poor”. In addition 61% of visitors rated the quality of shops and services in Baldock as “quite good” or “very good”, compared with 14% “quite poor” or “very poor”.

3.132 In-street visitor’s suggested improvements were:

- increased range of national/multiple chain stores (9%);
- increased range of local/speciality retailers (11%);
- improved quality of shops and services (10%); and
- improved outdoor market (5%).

3.133 These results suggest there is some dissatisfaction with comparison goods shopping facilities in Baldock. Given that Baldock is a small centre, customer’s expectation may be lower than in larger centres such as Hitchin and Letchworth Garden City. Nevertheless there is scope for improvements that could help to attract more customers.

Large Format Stores/Retail Warehouses

3.134 There are seven retail warehouses in North Hertfordshire, primarily in Letchworth Garden City. The provision of DIY stores is reasonable with Wickes and Topps Tiles, but B&Q and Focus have closed their stores. There are no furniture or electrical outlets and only one carpet store. Family Bargains have taken stores previously occupied by bulky good retail warehouse operators.

3.135 The household survey results indicate that there is a relatively low retention of shopping trips for retail warehouse type goods such as DIY, electrical and other bulky goods items in North Hertfordshire. Leakage from North Hertfordshire for these goods is predominately to facilities in Stevenage. The market share of bulky goods trips from the study area (last destination) attracted to the District is as follows:

- domestic electrical goods 9.2%;

- other electrical goods 5.6%;
- furniture, soft furnishings and floor-coverings 10.8%;
- DIY/hardware 31.4%;
- garden items 29.3%.

3.136 These results reflect the retail warehouse provision in the District, i.e. DIY stores but no furniture or electrical outlets.

3.137 The bulky goods sector has been hit hard by the economic downturn and operator demand for premises is weak, and this is likely to continue in the short term. In the longer term there may be potential to improve this sector.

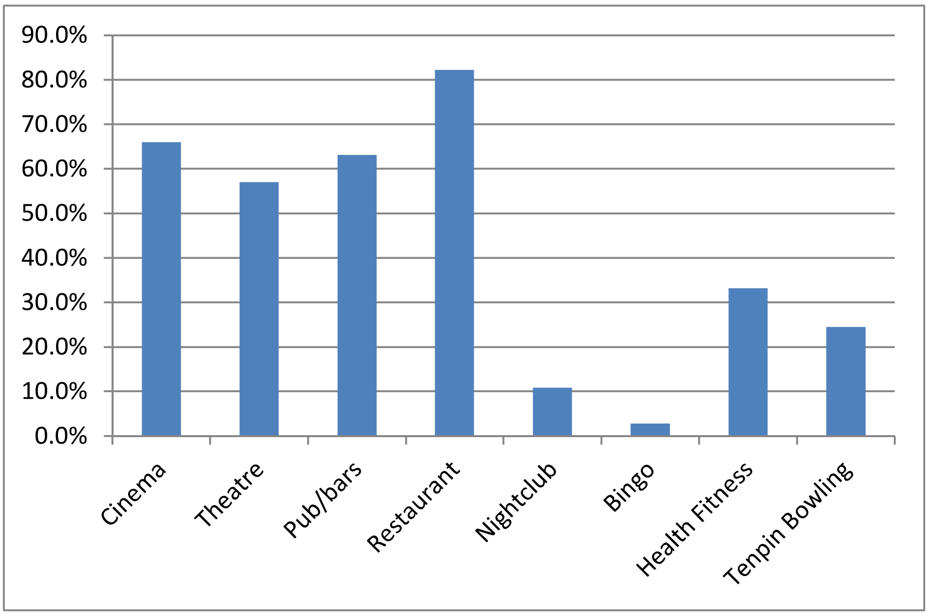
4.0 Requirement for Other Town Centre Uses

Introduction

4.1 This section assesses the potential for commercial leisure and other town centre uses in North Hertfordshire District, including cinemas, tenpin bowling, bingo, theatres, nightclubs, private health/fitness suites and catering, pubs and bars.

4.2 Household survey respondents were asked about their family's leisure activities. The participation rates within the study area are shown in Figure 4.1. An assessment of these sectors in set out in this section.

Figure 4.1 Leisure Participation (% of Households)



Source: NEMS Household Survey 2016

Commercial Leisure Uses

4.3 Residents in North Hertfordshire District have relatively good access to range of commercial leisure and entertainment facilities in neighbouring authorities, where most of the key sectors are represented.

4.4 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

4.5 North Hertfordshire District's population has good access to major leisure parks in Stevenage, Luton and Cambridge. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities.

Cinemas

4.6 The household survey results indicate that 66% of households within the study area visit the cinema. The main destinations visited by these participating households were:

Table 4.1 Main Cinema Trip Destinations

Destination of Last Trip	% of Participating Households
Letchworth Garden City	40.2
Stevenage	28.5
Cambridge	8.4
Hatfield	5.7
Luton	4.8
Welwyn Garden City	3.3

Source: NEMS Household Survey February 2016

4.7 The only permanent full time cinema within North Hertfordshire District is the Broadway Cinema in Letchworth Garden City, with 4 screens and 840 seats. The Royston Picture Palace has around 2-3 screenings per week.

4.8 The study area's population in 2016 (241,600 people) will generate 628,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). The market shares estimated from the household survey suggests about 251,000 of these cinema trips (40% of the total) are attracted to the Broadway Cinema in Letchworth Garden City. The survey results suggest the Broadway Cinema attracted about 320 trips per seat in 2016, which is above the national average of around 230 trips per seat. The Letchworth cinema offers tickets at an affordable price, starting from £5, which may explain its higher than average usage.

4.9 Based on the national average trips per cinema seat (230 trips per seat), 251,000 trips in the District as a whole in 2016 generates demand for 1,091 cinema seats, which suggest a current under-supply of 251 seats.

4.10 The study area's population in 2031 (284,900 people) will generate 741,000 cinema trips per annum, based on the national average visitation rate (2.6 trips per annum). If North Hertfordshire attracts 40% of these trips (296,400) then the demand for cinema seats would increase from 1,091 in 2016 to 1,289. The current under-supply of seats would increase from 251 seats to 449 seats.

4.11 If North Hertfordshire District can increase its market share of cinema trips then there could be scope for a small independent cinema.

Theatres

4.12 In total 57% of respondents to the household survey indicated that they visit the theatre. When asked where they had last visited the theatre, the following main destinations were mentioned.

Table 4.2 Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Central London	55.7
Stevenage	12.2
Cambridge	10.4
Milton Keynes	5.9
Hitchin	4.2
Dunstable	3.3
Letchworth Garden City	2.2

Source: NEMS Household Survey February 2016

4.13 North Hertfordshire appears to attract only 6.4% of theatre trips.

4.14 Data from the British Theatre Consortium, UK Theatre and the Society of London Theatre (2013) estimates annual theatre attendance in the East of England Region was 34.8 per 100 people. Based on this average, the North Hertfordshire Study Area's population in 2016 (241,600 people) will generate 84,000 theatre trips per annum. The household survey results suggest most of these trips will be attracted to Central London, with only 5,300 trips attracted to North Hertfordshire District. The Study Area's population at 2031 (284,800 people) could generate about 99,000, an increase of 15,000 trips, but based on current market shares a small proportion of these additional trips are likely to be attracted to North Hertfordshire District.

4.15 There is no clear need for additional theatre provision in North Hertfordshire District.

Private Health and Fitness Clubs

4.16 The household survey indicates that 33.2% of respondents or their families visit health/fitness clubs. Of the participating households, the main destinations mentioned are summarised in Table 4.3.

4.17 North Hertfordshire attracts about 60% of health and fitness trips within the study area.

Table 4.3 Main Health and Fitness Trip Destinations

Destination of Last Trip	% of Participating Households
Letchworth Garden City	23.4
Hitchin	17.3
Royston	14.8
Stevenage	9.4
Biggleswade	4.5
Harpenden	3.7
Central London	2.6
Luton	2.6
Knebworth	2.6
Cambridge	2.4
Baldock	1.7

Source: NEMS Household Survey February 2016

4.18 The Sport England/Active Places data indicates there are 18 health and fitness suites in the District, one of which is for a school's private use only. The 14 suites open to the general public (including registered members) have 677 fitness stations and there are 741 stations in total, as shown in Table 4.4.

4.19 The study area's population in 2016 (241,600 people) is projected to grow to 284,900 by 2031. Health and fitness facilities in North Hertfordshire District attract 60% of the population in the study area, i.e. 145,000 in 2016 and 171,000 in 2031. North Hertfordshire District currently has about 5.1 fitness stations per 1,000 people (741 stations in total).

4.20 The East of England region has 753 Sport England registered health and fitness suites with 33,925 fitness stations (average of 45 stations per suite). This existing provision equates to 5.6 fitness stations per 1,000 people.

4.21 If North Hertfordshire District's health and fitness catchment population had the same provision per head of population as the East of England average (5.6 stations per 1,000 people) then the number of fitness stations would be 812, which implies an existing under-supply of 71 stations.

4.22 The catchment population is projected to increase to 161,800 at 2031 (60% of 284,900 people), which would generate demand for 958 health and fitness stations compared with the current provision 741 station.

Table 4.4: North Hertfordshire Health and Fitness Clubs (Sport England/Active Places Data 2014)

Name/Location	Type	No. Stations
Chesfield Downs Country Club, Hitchin	Pay and Play	37
Fitness Hub, Letchworth GC	Pay and Play	24
Heath Sports Centre, Royston	Pay and Play	23
Hitchin Sports Centre, Hitchin	Sports Club/Association	20
Archers, Hitchin	Pay and Play	80
Knights Templar Sports Centre, Baldock	Membership	41
Letchworth Garden City RUFC	Sports Club/Association	12
Letchworth Sports and Tennis Club	Pay and Play	50
North Hertfordshire Leisure Centre, Letchworth GC	Pay and Play	70
Nuffield Health, Letchworth GC	Membership	60
Odyssey Health Fitness Club, Knebworth	Membership	80
Peak Physique and Fitness, Hitchin	Pay and Play	30
Pride Fitness, Letchworth GC	Pay and Play	44
Royston Leisure Centre	Pay and Play	40
St Christopher School, Letchworth GC	Sports Club/Association	20
Princess Helena College, Hitchin	Private Use	12
Wilmotts Gym, Royston	Pay and Play	18
Xchange Fitness, Hitchin	Pay and Play	80
TOTAL		**741**

4.23 On the basis that North Hertfordshire District attracts 60% of health and fitness trips from the study area, there could be scope for 217 additional fitness, or about 2 to 3 health and fitness facilities. Based on existing provision and markets share of trips in the study area the priority for new facilities appears to be Letchworth Garden City and Royston.

Tenpin Bowling

4.24 North Hertfordshire has no ten pin bowling facilities. In total 24.5% of respondents to the household survey indicated that they visit ten-pin bowling alleys. The main destinations are set out in Table 4.5.

Table 4.5 Main Ten Pin Bowling Destinations

Destination of Last Trip	% of Participating Households
Stevenage	69.7
Cambridge	11.7
Watford	3.4
St Albans	2.6
Dunstable	2.5
Luton	2.4

Source: NEMS Household Survey February 2016

4.25 The study area's population in is 241,600 and is projected to grow to 284,900 by 2031. This population could theoretically support 20 lanes, based on one lane per 12,000 people (national average) in 2016 increasing to 24 lanes in 2031. These figures and the availability of ten pin bowling facilities in Stevenage, Cambridge and Luton suggest that a tenpin bowling facility may not be viable in the District.

Bingo, Games of Chance and Gambling

4.26 There are no mainstream bingo facilities or commercial casinos in North Hertfordshire District. There are a number of betting shops within the District and there is representation in all four main town centres, 10 in total. In total only 2.8% of respondents to the household survey indicated that they visit bingo halls. The main destinations are as follows.

Table 4.6 Main Bingo Destinations

Destination of Last Trip	% of Participating Households
Stevenage	46.8
Luton	25.0
Bedford	7.4
Biggleswade	6.6
Hitchin	6.0

Source: NEMS Household Survey February 2016

4.27 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require buildings of between 2,000 - 3,000 sq.m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 within freestanding towns (source: Business In Sport and Leisure BISL).

4.28 The adult (over 18) population of North Hertfordshire study area (around 180,000 people) would generate about 315,000 admissions based on the national participation rate (1.75 trips per adult). Based on national average figures (113,000 admissions per club), the study area population could in theory support 2-3 bingo facilities.

4.29 These figures and the availability of bingo facilities in Stevenage and Luton suggest that a bingo hall would not be viable in the District. The catchment population of the main towns in the District is unlikely to be sufficient to support a commercial casino.

Nightclubs/Live Music Venues

4.30 In total 10.8% of respondents to the household survey indicated that they visit nightclubs/live music venues. The main destinations are shown in Table 4.7. Hitchin is the main destination (11.9%) in the District followed by Royston (2%). The survey results suggest residents are prepared to travel reasonably long distances to visit nightclubs/music venues and Central London is a major draw.

Table 4.7 Main Nightclub Destinations

Destination of Last Trip	% of Participating Households
Central London	24.6
Cambridge	21.6
Hitchin	11.9
St Albans	11.8
Stevenage	7.0
Bedford	6.0
Milton Keynes	5.4
Luton	2.4
Royston	2.0

Source: NEMS Household Survey February 2016

4.31 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. Legislation that has extended licensing hours for other drinking establishments and banned smoking indoors in public buildings removed the industry's main competitive advantage.

Customers now visit pubs or bars that hold late night events. Nightclubs also came under pressure during the economic downturn.

4.32 There is no clear need for additional nightclub facilities in North Hertfordshire District.

Other Services, Restaurants, Bars and Takeaways

4.33 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

4.34 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly.

4.35 The key categories for food and beverage offers are:

1. **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
2. **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
3. **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and
4. **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

4.36 Food and beverage establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres.

National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

Food and Beverage Expenditure

4.37 Experian's latest 2014 local expenditure figures have been adopted. Food and beverage expenditure per capita projections are shown in Table 2, Appendix 4. These figures indicate that the average expenditure in the study area for food and beverages consumed away from the home plus takeaways eaten at home is £1,231 per capita in 2016. The total food and beverage expenditure in the study area is £299.91 million in 2016, see Table 3, Appendix 4.

4.38 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 23% between 2016 and 2031. Taking into account population growth, total food and drink expenditure within the study area is expected to increase from £299.91 million in 2016 to £435.22 million in 2031, an increase of about 45% (Table 3, Appendix 4).

Food and Beverage Expenditure Patterns

4.39 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2016) penetration rates are shown in Table 4, Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within North Hertfordshire District is £159.41 million in 2016.

4.40 The retention rate in North Hertfordshire is reasonably high at around 51%. An appropriate strategy for North Hertfordshire should be to maintain this existing market share.

4.41 Available food and beverage expenditure has been projected forward to 2031 in Tables 7 to 9, Appendix 4. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Tables 10 in Appendix 4. Surplus expenditure has been converted into floorspace projections in Table 11, Appendix 4, using an average sales density of £5,000 per sq.m, inflated by 1% per annum. The floorspace projections are broken down in Table 4.8 below.

Table 4.8 Food and Beverage Floorspace Projections

	Floorspace (sq.m gross)		
	By 2021	By 2026	By 2031
Hitchin	885	1,787	2,659
Letchworth Garden City	372	772	1,170
Royston	376	687	831
Baldock	127	491	279
Urban extensions	289	719	876
Other North Herts	81	184	279
Total	**2,131**	**4,640**	**7,027**

Conclusions

4.42 The commercial leisure assessment in this section suggests:

- There is a theoretical under-supply of 251 cinema seats in the District, which will increase to 449 seats by 2031 due to population growth. The District could support a small independent cinema, although operator demand for this type of facility is uncertain.
- There could be scope for about 2-3 additional health and fitness clubs with a total of 217 fitness stations in the District by 2031. The priority for new facilities appears to be Letchworth Garden City and Royston
- There is no clear need for additional theatre facilities, tenpin bowling, bingo or nightclubs in North Hertfordshire over the plan period, due to existing provision in competing towns.
- There is a requirement for around an additional 7,027 sq.m gross of food and beverage floorspace in North Hertfordshire District by 2031.

5.0 # Accommodating Growth

Introduction

5.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

5.2 The National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

5.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

5.4 This section assesses the scope to accommodate growth within North Hertfordshire District's main centres.

Floorspace Projections

5.5 The floorspace projections set out in the previous sections assume that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres e.g. Stevenage;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in North Hertfordshire District;
- the ability of North Hertfordshire District's to maintain its existing market share of expenditure in the future in the face of increasing competition;

- the potential impact new development may have on existing centres.

5.6 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

5.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. The long term impact of home shopping on floorspace projections is uncertain.

5.8 The quantitative and qualitative assessment of the potential for new Class A retail floorspace within the previous sections suggests there is scope for new development within North Hertfordshire District during the Plan period (to 2031). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

5.9 The projections up to 2031 suggest there is scope for 8,581 sq.m gross of convenience goods floorspace, 22,505 sq.m gross of comparison goods floorspace and 7,027 sq.m gross of Class A3 to A5 space. In total 38,113 sq.m gross could be provided by 2031. Tables 5.1 and 5.2 summarise the floorspace projections by location up to 2026 and 2031.

Table 5.1: Summary of Floorspace Projections **2026** (sq.m gross)

Area	Convenience	Comparison	Food/Drink	Total
Hitchin	1,711	3,935	1,787	7,433
Letchworth Garden City	1,229	3,724	772	5,725
Royston	2,197	2,306	687	5,190
Baldock	393	959	491	1,843
Urban extensions	1,239	2,330	719	4,288
Other North Herts	17	181	184	382
Total	**6,787**	**13,435**	**4,640**	**24,862**

Source: Table 12 in Appendix 2 and Appendix 3 and Table 11 in Appendix 4.

Table 5.2: Summary of Floorspace Projections **2031** (sq.m gross)

Area	Convenience	Comparison	Food/Drink	Total
Hitchin	1,879	6,602	2,659	11,140
Letchworth Garden City	1,592	6,436	1,170	9,198
Royston	2,486	3,650	968	7,104
Baldock	795	1,712	831	3,338
Urban extensions	1,803	3,796	1,120	6,719
Other North Herts	26	309	279	614
Total	**8,581**	**22,505**	**7,027**	**38,113**

Source: Table 12 in Appendix 2 and Appendix 3 and Table 11 in Appendix 4.

5.10 Long term floorspace capacity forecasts up to 2026 and beyond are susceptible to change due to unforeseen circumstances. These long term projections are not only subject to changes in terms of population growth, but also growth in expenditure per capita and growth in turnover efficiencies. Experian's recommended growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Small variations in Experian's recommended growth rates (i.e. published annually) can lead to large variations in floorspace capacity when projected over a long period, therefore long term projections must be treated with caution and kept under review.

5.11 The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in North Hertfordshire.

5.12 Future retail development should be phased in accordance with the tables above. The identification of opportunities to meet the 2026 floorspace projections should be the priority, including the potential to accommodate growth within vacant shop premises. It will not be necessary to bring forward opportunities to accommodate longer term growth after 2026, and these long term projections will need to be monitored and kept under review. Broad areas where long term growth may be accommodated should be identified, and if necessary brought forward if the projected levels of growth are achieved.

5.13 The sequential approach suggests that designated centres should be the first choice for retail and leisure development. Development should be appropriate in terms of scale and nature to the centre in which it is located. In accommodating future growth, the following issues should be taken into consideration:

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?

- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

5.14 The existing stock of premises will have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed and a growth rate of 1% per annum is assumed for food and beverage floorspace. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

5.15 There were currently 96 vacant shop units (around 10,600 sq.m gross) within District in April 2015, an overall vacancy rate of 11.1%, which is just below the Goad national average (11.8%).

5.16 The pre-recession (2009) vacancy rate was around 7% in the District. Hitchin and Baldock already have vacancy rates lower than 7% and there may be less scope to accommodate growth in these two centres. Recent evidence in Royston suggests the vacancy rate has fallen since April 2015, but there is potential to accommodate growth in the remaining vacant units.

5.17 There were 23 vacant units in April 2015 with a total floor area of 3,200 sq.m gross. More recent evidence suggests there are 19 vacant units. If the vacancy rate in Royston fell to 7%, then 8 vacant premises would be occupied with a total floorspace of around 1,100 sq.m gross.

5.18 There is potential to accommodate growth in vacant shop premises in Letchworth Garden City. There were 47 vacant units in April 2015 with a total floor area of 4,200 sq.m gross. Most vacant units are small (less than 100 sq.m) and there are only 4 units over 200 sq.m. However if the vacancy fell from 18.7% to 7%, then 29 vacant premises would be occupied with a total floorspace of around 2,600 sq.m gross.

5.19 The short term priority in the aftermath of the recession and slow recovery should be the reoccupation of vacant floorspace, but this should not preclude investment within appropriate town centre locations.

Potential Development Opportunities

5.20 A review of potential development sites was undertaken in the four main centres in the District in 2009 and this was revisited in 2013 and re-assessed against the following factors:

- existing land uses and availability, categorised as follows:
  - short to medium term – up to 2021;
  - long term - likely to be completed after 2021;
- commercial potential for retail/leisure development and the most likely form of development, categorised as follows:
  - prime site - likely to attract a developer and occupiers;

  - secondary site – which may generate limited demand or only demand for a specific kind of use.

- potential scope to accommodate additional retail/leisure floorspace (net increase), categorised as follows:
  - small scale - under 1,000 sq.m gross floorspace;
  - medium scale – 1,000 to 2,500 sq.m gross floorspace;
  - large scale - over 2,500 sq.m gross floorspace;
- potential development constraints; and
- possible alternative uses.

5.21 The overall development prospects of each opportunity, taking on board all of the factors listed above, was categorised as follows:

- Good - development sites that have good prospects for providing additional retail/leisure floorspace, and should be considered for implementation in the short to medium term;
- Reasonable - development sites which are well located and may provide potential for additional floorspace, although obstacles to development will need to be overcome, but implementation may only be achieved in the long term; and
- Poor - development sites that may be unattractive or unsuitable for retail or leisure development where their delivery is very uncertain.

5.22 The overall rating was based on an initial evaluation for each site, rather than a detailed appraisal of development constraints, land ownership and potential development costs. This evaluation provided a framework within which the Council could consider the implementation of a development strategy for each centre.

5.23 Development delivered up to 2026 could now be considered to be short to medium term, and development pots 2026 should now be considered to be long term.

Hitchin

5.24 The projection for additional floorspace to accommodate new Class A1 to A5 uses in Hitchin could be 7,400 sq.m gross by 2026, increasing to 11,100 sq.m gross by 2031. Only a small part of this projection can be met by the reoccupation of vacant floorspace in the town centre.

5.25 Three potential development sites were previously identified Hitchin that could accommodate new floorspace. The capacity for these three sites was as follows:

- Churchgate Development Area (2,000 to 4,000 sq.m gross);
- The Post Office site (600 sq.m gross); and
- Paynes Park (up to 3,000 sq.m gross).

5.26 Based on the previous site appraisals, there is theoretical scope to accommodate most of the short to medium term floorspace projection up to 2026 in Hitchin, or about two thirds of the long term projection up to 2031.

5.27 As recommended in 2013, the Churchgate and Paynes Park areas could be allocated for mixed use retail led development in the emerging development plan and the Churchgate area lends itself to phased development. In order to achieve this objective these two sites would need to be assembled and brought forward in the short term, recognising that construction is likely to take 2-3 years and the completed development will not achieve full and settled trading levels for another two years.

5.28 The 2013 study recommended that the Churchgate site should be allocated for retail led mixed use development, and this allocation should provide the necessary flexibility to enable developers/investors to work up a viable scheme. The Council could also consider Compulsory Purchase Order powers to assemble the sites.

5.29 If it is not possible to accommodate all projected growth at 2026, because the three opportunity sites listed above are not delivered, then this may result in a reduction in Hitchin’s market share of expenditure. If these opportunity sites cannot be secured to help maintain Hitchin’s market share by 2026, then it may be necessary to redistribute growth from Hitchin to Letchworth Garden City. For example, Hitchin attracts about 12% of its comparison trade from the Letchworth Garden City, Baldock and Royston zones.

5.30 Even if the three opportunity sites are delivered by 2026, longer term growth up to 2031 may require further development sites to be identified. In the longer term, particularly after 2026, it may be appropriate to plan for a reduction in Hitchin’s market share within these areas, because this would not have an adverse impact on shopping travel patterns and the length of shopping trips.

Letchworth Garden City

5.31 The projection for additional Class A1 to A5 floorspace in Letchworth Garden City could be 5,700 sq.m gross by 2026 increasing to 9,200 sq.m gross by 2031, of which 2,600 sq.m gross could be met by the reoccupation of vacant floorspace. The priority in the short term (up to 2021) should be the reoccupation of vacant shop units, leaving 3,100 sq.m gross to be delivered by 2026 or 6,600 sq.m gross by 2036.

5.32 The three potential development areas were identified within Letchworth Garden City, as follows:

- The Wynd (up to 4,500 sq.m gross of additional floorspace);
- Arena Parade (up to 5,000 sq.m gross of additional floorspace);
- Junction of Gernon Road/Broadway (up to 1,000 sq.m gross).

5.33 With vacant floorspace, these sites are theoretically capable of accommodating all the floorspace projection up to 2031, and could absorb up to 3,900 sq.m gross of additional floorspace transferred from other centres e.g. Hitchin and Baldock. In effect additional development in Letchworth Garden City would assist in clawing back expenditure leakage to Hitchin and Baldock, and some of the identified growth in Hitchin and Baldock could be transferred to Letchworth Garden City.

Baldock

5.34 The projection for additional Class A1 to A5 floorspace in Baldock could be 1,800 sq.m gross by 2026, increasing to 3,300 sq.m gross by 2031.

5.35 If proposals remerge to extend the Tesco store in Baldock then a significant element of this projection could be accommodated at the Tesco store. Previously 1,800 sq.m net of additional sales floorspace was proposed, which if implemented increase the amount of convenience and comparison sales floorspace in the store (around 2,600 sq.m gross).

5.36 Limited other potential to accommodate major development was identified in Baldock. As indicated above, retail capacity could be transferred from Baldock to Letchworth Garden City, alternatively growth could be accommodated by new retail facilities associated within urban extensions.

Royston

5.37 The projection for additional Class A1 to A5 floorspace in Royston could be 5,200 sq.m gross by 2026, increasing to 7,100 sq.m gross by 2031 of which 1,100 sq.m gross could be met by the reoccupation of vacant floorspace.

5.38 Three potential development sites were identified within Royston in previous studies, as follows:

- Angel Pavement redevelopment (up to 800 sq.m gross additional);
- Princes Mews East and West (up to 500 sq.m gross additional); and
- End of Upper King Street (up to 500 sq.m gross addition).

5.39 These sites (if delivered) and the reoccupation of vacant floorspace (1,100 sq.m) would be capable of accommodating over half of floorspace projection up to 2026, or about a 40% of the projection up to 2031.

5.40 The 2013 study suggested the town hall area in Royston could accommodate longer term up to 2031. Development proposals for a Waitrose store on land at the Royston Business Park, if implemented, could accommodate the convenience goods projection up to 2031 (2,700 sq.m gross). We understand alternative retail development proposals may emerge for this site.

Urban Extensions

5.41 The retail floorspace projections assume 16,500 new dwellings will be completed in the District over the plan period, including urban extensions to the north of Letchworth, north of Baldock, east of Luton, north of Hitchin and around Stevenage and Knebworth. Population growth accommodated within these new dwellings is a key driver of the retail floorspace projections within this report, in particular the convenience goods floorspace projections.

5.42 Within urban extensions new local shopping facilitates will be required within the urban extensions in order to ensure residents have access to day to day shops and services. Ideally all new dwellings should be within walking distance of a local centre or parade of shops, about 500 to 800 metres.

5.43 We understand a number of urban extensions are likely to be included as part of the local plan, as follows:

- North of Hitchin (700 homes);
- North of Baldock (2,800 homes);
- North of Letchworth (900-1,000 homes);
- North of Stevenage (900-1,000 homes in North Hertfordshire); and
- East of Luton (2,100 homes).

5.44 The floorspace projections in this report assume an allowance for local shopping facilities within these four urban extensions. Based on NLP's experience, local shopping facilities could retain around 30% of convenience goods expenditure (i.e. primarily top up food and grocery shopping) and up to 20% of comparison goods expenditure (lower order goods brought on a regular basis) and 20% for food/beverage expenditure.

5.45 Based on this approach, proposed urban extensions could provide the following Class A retail floorspace:

- North of Hitchin Letchworth - convenience goods of 100 sq.m net (150 sq.m gross), comparison goods of 200 sq.m net (250 sq.m gross) and 100 sq.m gross of other Class A2 to A5 non-retail services
- North of Letchworth - convenience goods of 200 sq.m net (300 sq.m gross), comparison goods of 500 sq.m net (650 sq.m gross) and 200 sq.m gross of other Class A2 to A5 non-retail services;
- North of Baldock - convenience goods of 500 sq.m net (750 sq.m gross), comparison goods of 1,000 sq.m net (1,300 sq.m gross) and 400 sq.m of other Class A2 to A5 non-retail services;
- North of Stevenage - convenience goods of 300 sq.m net (400 sq.m gross) and comparison goods of 750 sq.m net (1,000 sq.m gross) and 300 sq.m of other Class A2 to A5 non-retail services; and
- East of Luton - convenience goods of 250 sq.m net (350 sq.m gross) and comparison goods of 600 sq.m net (850 sq.m gross) and 250 sq.m of other Class A2 to A5 non-retail services.

5.46 These approximate figures are indicative only, but the provision of new local centres within urban extensions can make a contribution towards meeting the longer term retail floorspace projections. The retail development strategy will need to be reviewed when the position on housing development and the masterplans for urban extensions become clearer.

5.47 It is possible that the urban extensions at Letchworth Garden City and Baldock could accommodate additional growth attributed to Hitchin, Letchworth Garden City and Baldock within the floorspace projections.

6.0 Policy Approaches

Introduction

6.1 The 2013 study provided a review of shopping frontage and boundary policies options within North Hertfordshire. The 2013 study noted that it is important that town centres maintain their primary retail function, whilst increasing their diversity with a range of complementary uses, promoting competitive town centre environments.

6.2 The importance of a balance between retail and leisure activity has increased since 2013, as town centres increasingly need to compete with on-line shopping. Town centres need a good mix of uses that extend activity throughout the daytime and into the evenings.

Town Centre Boundaries

6.3 The designation of a primary shopping areas or centre boundaries is important when applying the sequential approach and directing retail and town centre uses to sustainable locations.

6.4 The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

6.5 Baldock and Royston are relatively small town centres that are predominantly surrounded by residential uses. These centres do not have significant areas adjoining the PSA where other commercial uses are located e.g. leisure, business and other main town centre uses. As indicated in the 2013 study, in these two centres the town centre boundary would not extend significantly beyond the shopping frontages.

6.6 The 2013 report recommended that in Baldock and Royston the town centre boundary should be tightly drawn around the designated primary and secondary frontages and that the supporting text to new policies should make clear that designed primary/secondary frontages constitute the town centre boundary. There are no reasons to change this recommended approach based on changes since 2013.

6.7 Hitchin and Letchworth Garden City are larger centres, but are also predominantly surrounded by residential uses. In Letchworth Garden City the 2013 study recommended that in Hitchin and Letchworth Garden City separate town centre and primary shopping area boundaries should be designated.

6.8 In Letchworth civic and office uses should be included within a wider town centre boundary. The study suggested the primary shopping area and town centre boundary should extend the same distance to the north, east and south of the centre. In Hitchin office/employment uses adjacent to the shopping area could also be included within the wider town centre boundary.

6.9 The 2013 study recommended that the Primary Shopping Areas in Hitchin and Letchworth Garden City should be tightly draw around the designated as primary and secondary frontages. The wider town centre boundary should include the primary shopping area and other adjacent commercial areas, where other main town centre uses should be encouraged.

6.10 Recommendations for emerging policy suggested the first preference for Class A retail uses will be within the defined Primary Shopping Areas in Hitchin and Letchworth Garden City, the defined Town Centre boundaries in Baldock and Royston and local centres. The first preference for other main town centre uses should be the Town Centre boundaries of all centres and local centres.

6.11 As before, retail and other main town centre uses outside of these areas will need to comply with the sequential approach and impact tests as set out in the NPPF.

6.12 There are no reasons to change this recommended approach based on changes since 2013.

Primary and Secondary Shopping Frontages

6.13 The NPPF indicates that policies that control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. Planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. The NPPF provides limited guidance on the definition of primary and secondary frontages, or how policy should seek to balance diversity and the need to maintain retail uses in town centres.

6.14 The NPPF does not suggest that shopping frontage policies must be adopted in all town centres, but this approach could result in the deterioration of shopping frontages in the District, and this could undermine their role as shopping centres.

6.15 The number of vacant units is low in Hitchin and Baldock. In Letchworth and Royston the vacancy rate is higher than the national average, but there are limited concentrations of vacant units. There is no need to relax shopping policies in order to encourage non-retail uses to reoccupy vacant units or to regenerate rundown areas. As a result shopping frontage policies are still required in North Hertfordshire to maintain the appropriate mix of town centres, in order to maintain the vitality and viability of centres and prevent adverse impacts on residential amenity.

6.16 A ban on changes of use from Class A1 across frontages would not promote diversity and could stifle investment, which would be potentially damaging to the vitality and viability of centres. In secondary shopping areas the introduction of more restrictive shop frontage policies may be inappropriate as it could lead to an increase in vacant units, because demand for Class A1 retail occupiers is unlikely to be as strong within peripheral parts of the town centres. In addition there is no evidence that suggests North Hertfordshire's town centres have a harmful or disproportionately high level of non-shop uses at present, or that the proportion of non-retail uses has increased significantly since 2009.

6.17 The designation of primary and secondary frontages remains an appropriate approach in Hitchin, Letchworth Garden City and Royston, but a clear policy approach should be considered relating to these frontages. The wording of these policies should provide sufficient flexibility to allow non-retail uses to secure representation in town centres, where the proposed use would not be harmful to the town centres vitality and viability or residential amenity.

6.18 In Baldock there is no obvious area where there is a predominance of Class A1 retail use. The secondary frontage designation should continue to be defined.

6.19 The Council should continue to protect against the loss of ground floor Class A1 retail uses within designated primary frontages. However, if the policy is to be defensible then the primary frontages should be appropriately drawn, and should not include areas where Class A1 use is not the predominant use or where some degree of flexibility and diversification would be acceptable or necessary to maintain or enhance a declining shop frontage.

6.20 Primary frontage policies generally fall into three broad categories:

- an embargo on non-Class A1 retail uses within tightly drawn primary frontages, but with a more flexible approach in secondary shopping frontages;
- maximum thresholds for non-retail uses in shopping frontages; and
- criteria based policies relating to impacts e.g. economic and amenity.

6.21 The first approach provides clarity but is relatively inflexible and may prevent non-retail uses that would enhance the vitality and viability of the centre, unless there are exceptional circumstances that may apply.

6.22 Under the second approach policies can include a maximum limit of frontage to be in non-A1 retail uses, either in terms of the proportion of uses or measured frontage. These types of policies can relate to individual sections of the frontages or the frontages as a whole. These types of policies are more difficult to monitor and apply.

6.23 The third approach offers the most flexibility and allows decision makers to consider applications on a case by case basis, but this approach provides less clarity for investors/applicants and more subjective criteria can be challenged.

6.24 In North Hertfordshire, primary shopping frontages can be appropriately drawn where there is a predominance of Class A1 retail uses within Hitchin, Letchworth Garden City and Royston. A strong restriction on all changes of use from Class A1 can be maintained in these frontages if a flexible approach is adopted in secondary frontages.

6.25 Within the primary shopping frontages in Hitchin, Letchworth Garden City and Royston there should be a strong presumption against the loss of ground floor Class A1 units, unless the proposed use can demonstrate exceptional circumstances where it is essential to promote the vitality and viability of that part of the town centre. These proposals would need to show that they do not undermine the retail function of the centre and will not disrupt shopping pattern/footfall and will attract people to the centre, enhancing the centre's vitality and viability.

6.26 In order to promote extended trading hours restaurants, café and bars (Class A1, A3 and A4) could be encouraged to locate in designated secondary shopping frontages in Hitchin, Letchworth Garden City, Baldock and Royston town centres, and there should be no policy restriction on these uses, other than amenity/transport impact issues dealt with by separate policies.

6.27 Acceptable alternative uses at ground floor level within secondary frontages should be confined to A2 (financial and professional services), A5 (takeaways), D1 (non-residential institutions), D2 (assembly and leisure). These uses should be permitted where they do not undermine the retail function of the centre and where the proposal will attract people to the centre. They should also retain an active shop frontage.

Potential Changes to Designated Frontages

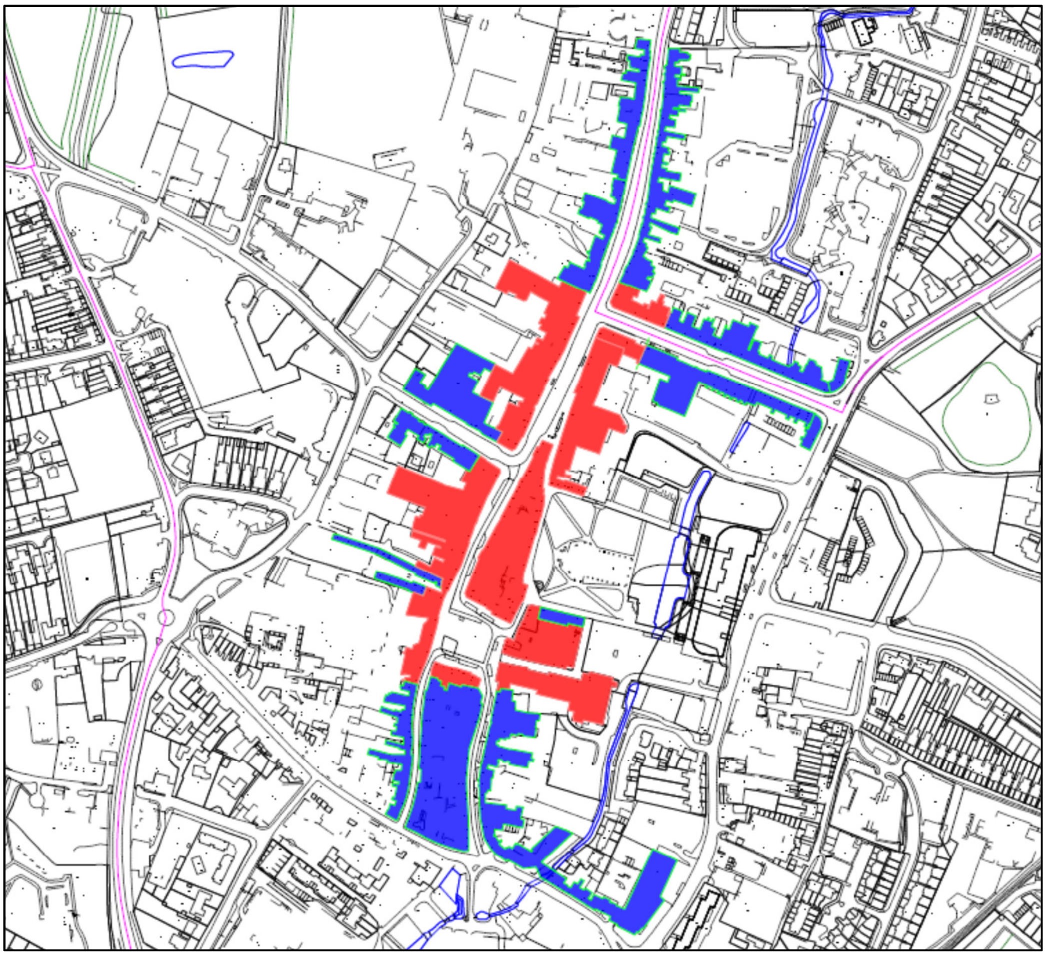
6.28 If the policy approach outlined above is adopted then some amendments to the designated primary and secondary frontages should be considered, as set out below.

6.29 **Hitchin** – previously the primary shopping frontages have been relatively tightly drawn within the core area of the centre, and account for around half of the centre as a whole. The most obvious area that could be considered for reclassification as secondary frontage is Hermitage Road. There is a case for re-designating the eastern two thirds of Hermitage Road to secondary frontage to encourage diversity.

6.30 The primary frontage along Bancroft should not extend north of Hermitage Road on both sides because this area is peripheral to the prime pitch and no longer has a predominance of Class A1 retail use.

6.31 The narrow pedestrian route on the northern side of Churchgate contains small outlets and is not on the main retail circuit. This area could also be re-designated as secondary frontage. The potential primary (shown in red) and the secondary (shown in blue) frontage designations are shown in Figure 6.1 below.

Figure 6.1: Potential Primary and Secondary Frontages in Hitchin Town Centre



6.32 **Letchworth Garden City** – the primary shopping frontages relates to main shopping circuit for pedestrians i.e. Eastcheap, Leys Avenue and Garden Square Shopping Centre. It has been suggested that the east side of Eastcheap near the cinema could be identified as a cultural quarter. The Arena Parade frontage of Arena House could also be considered for uses complementary to the cinema.

6.33 Retail uses on the north side of Station Road provide important supporting services i.e. adjacent to the Station and near the roundabout to the east. These uses could be designated as secondary frontage, where a flexible approach will be adopted.

6.34 The frontages in the southern area of the town centre including Morrison's, south of Eastcheap and the southern and west side of Arena Parade could be reallocated from primary to secondary frontage. These frontages are occupied primarily by small independent traders and are not on the main shopping circuit. The frontages do not contain a predominance of Class A1 retail use.

6.35 The potential primary (shown in red) and the secondary (shown in blue) frontage designations are shown in Figure 6.2 below.

Figure 6.2: Potential Primary and Secondary Frontages in Letchworth Garden City Town Centre

6.36 **Royston** – the primary shopping frontage can be tightly drawn within the core area of the centre, along the High Street where the largest retail units and national multiple operators are concentrated. Other frontages have a broad mix of uses and can be designated as secondary frontages, including an extension along Melbourne Street and the southern side of Baldock Street.

6.37 The potential primary (shown in red) and the secondary (shown in blue) frontage designations are shown in Figure 6.3 below.

6.38 **Baldock** – as indicated above it is not necessary to define separate primary and secondary shopping frontages. Some existing commercial units can be included in the secondary frontages e.g. the northern side of Whitehorse Street. The westernmost part of the centre can be excluded from the secondary frontage. The potential secondary frontage designation is shown in Figure 6.4 below.

Figure 6.3: Potential Primary and Secondary Frontages in Royston Town Centre

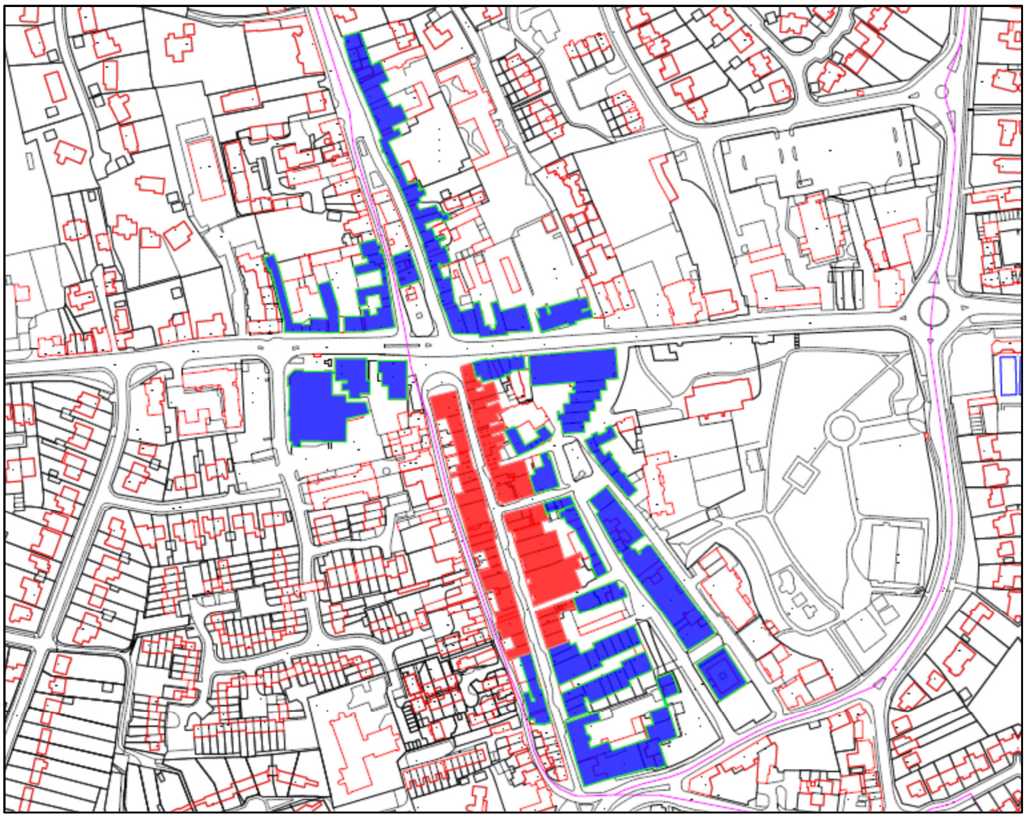
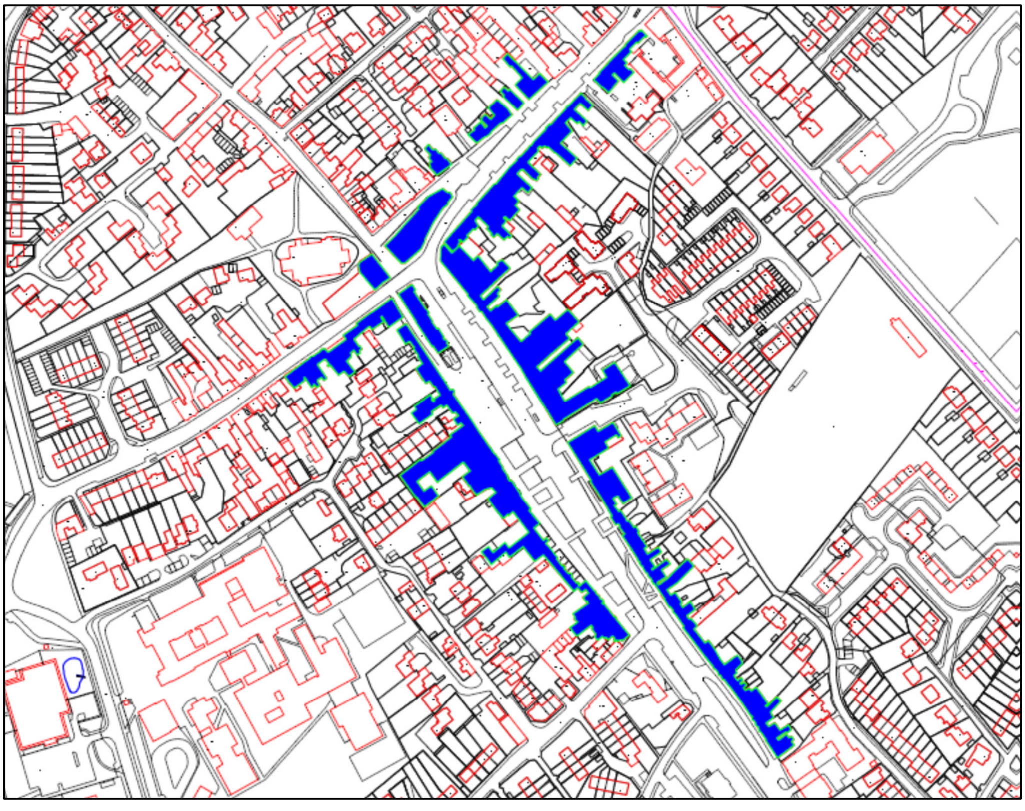


Figure 6.4: Potential Secondary Frontages in Baldock Town Centre



7.0 Conclusions

7.1 This report provides an update of the District wide needs assessment for retail and commercial leisure development in North Hertfordshire up to 2031. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in North Hertfordshire

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period i.e. 2031. It is necessary to consider how development should be phased and distributed within the District.

7.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.4 Long term forecasts beyond 2026 will be susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2026 is attributable to projected growth in spending per capita as well as population growth. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should also be monitored along with the affect proposals may have on the demand for additional development in North Hertfordshire.

Retail Floorspace Projections

7.5 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. However, the impact of Internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and Internet services utilise existing stores, therefore, internet sales will not always significantly reduce the demand for shop floorspace. In addition, some of the growth in Internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

7.6 The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new retail development within North Hertfordshire. The projections suggest new floorspace (over and above commitments) should be distributed as follows set out in Tables 7.1 to 7.3.

7.7 The floorspace projections in Tables 7.1 to 7.3 do not take into account the development proposals or commitments. If commitments are implemented then they will need to be subtracted from the floorspace projections.

7.8 These projections also assume the market share and role of each centre will remain unchanged in the future. If a retail development proposal within a town centre exceeds the respective floorspace projection for the town, then this does not necessarily mean the proposal should be refused planning permission, subject to the development being consistent with the role, character and catchment area of the town centre.

Table 7.1: Convenience Goods Retail Floorspace Projections

Centre	Additional Retail Floorspace Sq.M Gross (assuming net to gross ratio of 70%)			
	2016-2021	2021-2026	2026-2031	Total 2016-2031
Hitchin*	1,500	200	200	**1,900**
Letchworth G C	800	400	400	**1,600**
Royston	1,800	400	300	**2,500**
Baldock	0	400	400	**800**
Urban extensions	500	800	500	**1,800**
Other	0	0	0	**0**
Total	**4,600**	**2,200**	**1,700**	**8,600**

* Hitchin figures include local facilities required within the North Hitchin urban extension.

Table 7.2: Comparison Goods Retail Floorspace Projections

Centre	Additional Retail Floorspace Sq.M Gross (assuming net to gross ratio of 75%)			
	2016-2021	2021-2026	2026-2031	Total 2016-2031
Hitchin*	1,400	2,500	2,700	**6,600**
Letchworth G C	1,200	2,500	2,700	**6,400**
Royston	1,000	1,300	1,300	**3,600**
Baldock	200	800	700	**1,700**
Urban extensions	800	1,500	1,600	**3,900**
Other	100	100	100	**300**
Total	**4,700**	**8,700**	**9,100**	**22,500**

* Hitchin figures include local facilities required within the North Hitchin urban extension.

Table 7.3: Food and Beverage Floorspace Projections

Centre	Additional FAB Floorspace Sq.M Gross			
	2016-2021	2021-2026	2026-2031	Total 2016-2031
Hitchin	900	900	800	**2,600**
Letchworth G C	400	400	400	**1,200**
Royston	400	300	300	**1,000**
Baldock	100	400	300	**800**
Urban extensions	200	400	500	**1,100**
Other	100	100	100	**300**
Total	**2,100**	**2,500**	**2,400**	**7,000**

* Hitchin figures include local facilities required within the North Hitchin urban extension.

Accommodating Future Growth

7.9 The sequential approach suggests that town and centres should be the first choice for retail development. In North Hertfordshire District the preferred location for retail development needs to be carefully considered, particularly for major development which may have an extensive catchment area.

7.10 The existing stock of premises should have a role in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops in Letchworth Garden City could help to accommodate future growth.

7.11 Growth in sales densities and vacant shops will not be able to accommodate all the future growth in retail expenditure, therefore potential development sites need to be identified to accommodate growth over the plan period.

Convenience Goods Development

7.12 On the basis of the assumption that existing convenience retailers trade at national average turnover levels, the quantitative capacity analysis indicates there is potential for further convenience goods floorspace (6,800 sq.m gross) within the District up to 2026, increasing to 8,600 sq.m gross by 2031. Based on existing shopping patterns, a significant proportion of the projected expenditure surplus is concentrated in Royston (2,500 sq.m gross by 2031). The quantitative capacity in Royston could be met by the proposals for a Waitrose food store.

7.13 Local shopping facilities within urban extensions should make a contribution towards meeting the convenience goods floorspace projections. Around 2,000 sq.m gross could be provided within urban extensions in the form of local shopping provision, including North Hitchin.

7.14 Within Baldock town centre there is limited potential for convenience goods floorspace. However retail floorspace capacity from other parts of the District projection could be accommodate in Baldock if proposals to extend the Tesco store re-emerge, or transferred to local facilities within the Baldock urban extension.

7.15 In Hitchin and Letchworth there may be scope for some convenience retail development perhaps in the form of store extensions, mezzanine floors, or additional growth could be transferred to the North Letchworth urban extension. There appears to be no over-riding need to identify sites for additional large food stores in Hitchin or Letchworth. The long term projections suggest convenience good floorspace in Hitchin or Letchworth will be trading on average 16% above benchmark levels in 2031. This level of trading is unlikely to result in unacceptable levels of in-store congestion, recognising stores trade within a range around the company average sales density.

Comparison Goods Development

7.16 The strategy should seek to concentrate further comparison retail development within Hitchin and Letchworth Garden City town centres, as the main comparison shopping destinations in the District. The strategy should seek to maintain their current position in the shopping hierarchy and seek to maintain the District's existing market share of expenditure. There may be scope to transfer retail capacity from Hitchin and Baldock to Letchworth Garden City if growth cannot be accommodated in these centres.

7.17 The quantitative capacity analysis indicates that in the short to medium term up to 2026 there could be scope for about 13,400 sq.m gross of comparison floorspace in the District as a whole, and this could increase to 22,500 sq.m gross by 2031.

7.18 The Council should seek to identify sites within the designated centres to meet the short to medium term floorspace projections up to 2026, and then longer term opportunities to meet projections up to 2031.

7.19 Local shopping facilities within urban extensions should also make a contribution towards meeting the comparison goods floorspace projections. At least 3,900 sq.m gross could be provided within urban extensions in the form of local shopping provision.

7.20 Elsewhere Major comparison retail proposals (2,500 sq.m gross or more) outside the designated centres will be required to demonstrate there is no significant adverse impact on designated centres. All retail development of more than a local scale should comply with the sequential approach to site selection.

Commercial Leisure and Other Town Centres Uses

7.21 The provision of leisure, entertainment and cultural facilities within the District is limited but reflects the size of its catchment and the fact that residents also have good access to facilities in neighbouring towns such as Stevenage, Luton and Cambridge. The District's location within the catchment area of these larger centres will limit the potential for further commercial leisure and entertainment facilities.

7.22 There may be potential for 2-3 additional health club facilities in the District over the plan period, with the priority being Letchworth Garden City and Royston. There appears to be limited scope for other commercial leisure uses due to the existing provision within and/or near the District.

7.23 The quantitative capacity analysis indicates that in the short to medium term up to 2026 there could be scope for about 4,600 sq.m gross of food and beverage floorspace in the District as a whole, and this could increase to 7,000 sq.m gross by 2031. In qualitative terms the main priority is Letchworth Garden City, and demand for this use may help to reduce the existing vacancy rate.

7.24 Local shopping facilities within urban extensions should also make a contribution towards meeting the food and beverage floorspace projections. At least 1,100 sq.m gross could be provided within urban extensions.

Distribution of Development

7.25 Large-scale development which serves a significant part of the District should be concentrated within the larger centres, i.e. in Hitchin and Letchworth Garden City town centres.

7.26 Hitchin and Letchworth Garden City are the largest centres and should continue to act as the principal centres within the District. Baldock and Royston should complement Hitchin and Letchworth Garden City town centres by providing for main and bulk convenience food shopping and a reasonable range of comparison shopping facilities and other services. The village and neighbourhood centres should cater for top-up and basket convenience shopping and services, but are likely to provide a more limited range of comparison shopping.

7.27 The sequential approach indicates that town, district and local centres are the preferred location for new retail/leisure/cultural development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve will be relevant in assessing the area of search for sequential sites.

7.28 The NPPF 2012 indicates that the impact of retail development over 2,500 sq.m gross should be tested but local authorities can consider setting lower local thresholds. The Planning Practice Guidance provides more guidance on setting a locally appropriate thresholds, and indicates it will be important to consider the:

- scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy;
- impact on any other planned investment.

7.29 In terms of scale Royston and Baldock are relatively small centres with around 6,000 sq.m gross of comparison and convenience retail floorspace (excluding Tesco in Baldock). Development of 2,500 sq.m would be significant in relation to the scale of existing retail floorspace in these centres. Royston also has a relatively high vacancy rate and may be vulnerable to impacts from smaller scale development. A reduced locally set threshold of 500 sq.m gross should be considered in Baldock and Royston, due to the scale of these town centres and the floorspace projections set out above.

7.30 Hitchin and Letchworth Garden City are much larger centres around 40,000 sq.m gross and 27,000 sq.m gross of comparison and convenience retail floorspace respectively. Based on the scale and relative health of Hitchin and the lack of planned investment it may be difficult to justify an impact threshold of less than 2,500 sq.m gross. In Letchworth the lower existing floorspace and higher vacancy rate could justify a lower threshold. A reduced locally set threshold of 1,000 sq.m gross should be considered in Letchworth Garden City.

7.31 Future plan policies should continue to define shopping frontages, primary shopping areas and town centre boundaries, necessary for applying the sequential approach and also maintain an appropriate mix of uses within town centre.

Implementation and Monitoring

7.32 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the District, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre; and

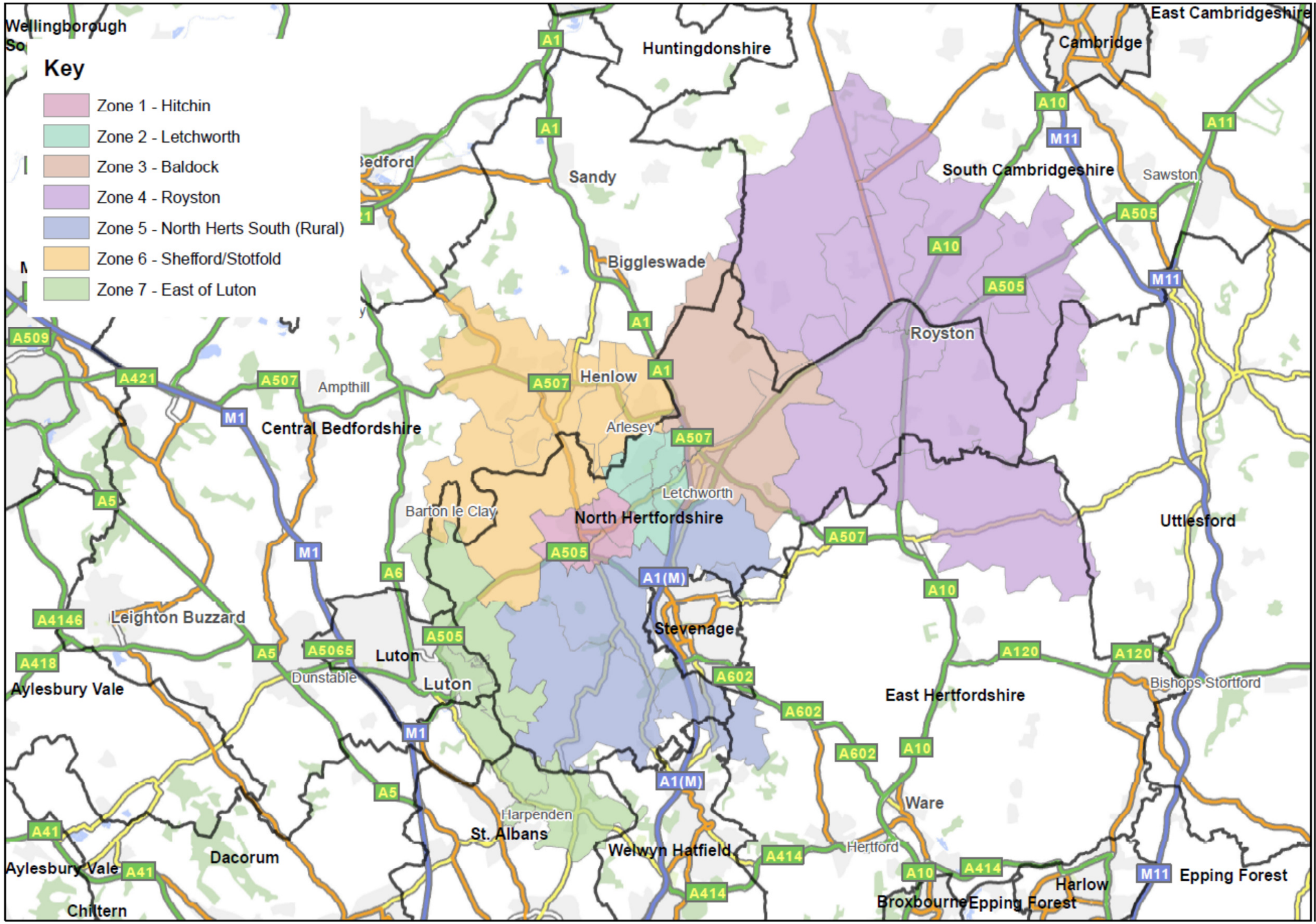
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

7.33 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.34 These key inputs into the capacity assessment can be amended to provide revised floorspace capacity projections.

Appendix 1 Study Area and Methodology


Key
Zone 1 - Hitchin
Zone 2 - Letchworth
Zone 3 - Baldock
Zone 4 - Royston
Zone 5 - North Herts South (Rural)
Zone 6 - Shefford/Stotfold
Zone 7 - East of Luton
Wellingborough
Huntingdonshire
Cambridge
East Cambridgeshire
South Cambridgeshire
Sawston
Sandy
Biggleswade
Royston
Henlow
Arlesey
Letchworth
North Hertfordshire
Ampthill
Central Bedfordshire
Barton le Clay
Uttlesford
Stevenage
Leighton Buzzard
Luton
Dunstable
Aylesbury Vale
East Hertfordshire
Bishops Stortford
Harpenden
St. Albans
Welwyn Hatfield
Hertford
Ware
Dacorum
Chiltern
Harlow
Broxbourne
Epping Forest

Retail Capacity Assessment – Methodology and Data

Price Base

1 All monetary values expressed in this study are at 2014 prices, consistent with Experian's base year expenditure figures for 2014 (Retail Planner Briefing Note 13, October 2015) which is the most up to date information available.

Retail Expenditure

2 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2014 have been obtained.

3 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 13) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

4 Experian's EBS growth forecast rates for 2014 to 2017 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.2% for 2014 to 2015, +0.1% for 2015 to 2016 and +0.3% for 2017; for comparison goods: +5.3% for 2014-2015, +3.2% for 2015-2016 and +2.9% for 2017.

5 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.1% per annum for convenience goods after 2017 and 3% per annum growth for comparison goods after 2017 increasing to 3.2% after 2022. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

6 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing

in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2014 is:

- 8.3% of convenience goods expenditure; and
- 14.9% of comparison goods expenditure.

7 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2014 are:

- 2.5% of convenience goods expenditure; and
- 11.2% of comparison goods expenditure.

8 The projections provided by Experian suggest that these percentages could increase to 4.7% and 15.1% by 2022 respectively, and estimated at 5.8% and 14.6% by 2031. These figures have been adopted in this assessment.

9 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

10 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow, however the pace of e-commerce growth will moderate markedly after about 2023. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.9% by 2022, rising to only 19.4% by 2031.

11 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

12 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the February 2016 household survey.

13 The total turnover of shops within North Hertfordshire is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Benchmark Turnover Levels

14 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

15 Changes in convenience goods sales areas since the 2013 update have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and the Council’s land use surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

16 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within North Hertfordshire and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. The total benchmark turnover of identified convenience sales floorspace within North Hertfordshire is £278.14 million (Tables 9 Appendix 2).

Mintel’s Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net.

Appendix 2 Convenience Goods Capacity

Table 1 : Population Projections

	2011	2016	2021	2026	2031
1 - Hitchin	32,689	34,255	34,670	35,112	35,566
2 - Letchworth Garden City	35,086	36,766	37,566	37,783	37,961
2A - North Letchworth Urban Extension	0	0	663	1,437	2,210
3 - Baldock	12,907	13,525	13,765	13,883	13,985
3A - North Baldock	0	0	995	3,757	6,188
4 - Royston	42,884	45,128	48,048	50,272	52,044
5 - North Herts South (Rural)	23,876	25,029	25,183	25,647	25,947
5A - Stevenage/Knebworth Urban Extensions	0	0	815	3,510	5,540
6 - Shefford/Stotfold	40,504	43,643	46,423	48,967	51,136
7 - East of Luton	41,038	43,278	45,663	47,819	49,645
7A - Luton Urban Extension	0	0	309	2,409	4,641
	228,984	**241,623**	**254,100**	**270,596**	**284,862**

Sources:

Experian Census Population 2011
N.Herts District (16,500 new dwellings and 30,982 between 2011 and 2031)
Distribution of population based on NHDC housing developments
ONS 2014 SNPP Population Projections for neighbouring authorities

Table 2: Convenience Goods Expenditure Per Capita (2014 Prices)

Expenditure Per Capita	2016	2021	2026	2031
1 - Hitchin	£2,073	£2,055	£2,052	£2,045
2 - Letchworth Garden City	£2,062	£2,044	£2,042	£2,035
2A - North Letchworth UE	£2,062	£2,044	£2,042	£2,035
3 - Baldock	£2,160	£2,141	£2,139	£2,131
3A - North Baldock UE	£2,160	£2,141	£2,139	£2,131
4 - Royston	£2,276	£2,257	£2,254	£2,246
5 - North Herts South (Rural)	£2,229	£2,210	£2,207	£2,199
5A - Stevenage/Knebworth UE	£2,147	£2,128	£2,126	£2,118
6 - Shefford/Stotfold	£2,174	£2,156	£2,153	£2,145
7 - East of Luton	£2,053	£2,036	£2,033	£2,026
7A - Luton UE	£2,147	£2,128	£2,126	£2,118

Sources: *Experian local estimates of 2014 convenience goods expenditure per capita*
Excluding special forms of trading.
Experian Business Strategies - forecast annual growth rates (Briefing Note 13)

Table 3: Total Available Convenience Goods Expenditure (£M - 2014 Prices)

Study Area	2016	2021	2026	2031
1 - Hitchin	£70.99	£71.24	£72.06	£72.74
2 - Letchworth Garden City	£75.81	£76.80	£77.14	£77.24
2A - North Letchworth UE	£0.00	£1.36	£2.93	£4.50
3 - Baldock	£29.21	£29.48	£29.69	£29.80
3A - North Baldock UE	£0.00	£2.13	£8.03	£13.19
4 - Royston	£102.71	£108.43	£113.30	£116.88
5 - North Herts South (Rural)	£55.78	£55.64	£56.59	£57.06
5A - Stevenage/Knebworth UE	£0.00	£1.73	£7.46	£11.73
6 - Shefford/Stotfold	£94.89	£100.08	£105.43	£109.71
7 - East of Luton	£88.86	£92.96	£97.22	£100.58
7A - Luton UE	£0.00	£0.66	£5.12	£9.83
Total	**£518.25**	**£540.50**	**£574.98**	**£603.26**

Sources: *Table 1 and Table 2*

Table 4: Base year Convenience Shopping Penetration Rates 2016

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff'd/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Waitrose, Hitchin	21.8%	2.9%	0.0%	1.8%	0.0%	0.6%	4.8%	0.0%	5.2%	3.1%	0.0%	5.0%
M&S Simply Food, Hitchin	4.8%	0.6%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.3%	0.9%	0.0%	5.0%
Sainsbury, Hitchin	29.5%	0.5%	0.0%	0.5%	0.0%	0.0%	8.1%	0.0%	7.4%	1.0%	0.0%	5.0%
Asda, Hithcin	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.3%	0.0%	0.0%	5.0%
Iceland, Hitchin	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%	0.0%	5.0%
Other Hitchin	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.2%	0.0%	5.0%
Hitchin Sub-Total	**71.4%**	**4.0%**	**0.0%**	**2.9%**	**0.0%**	**0.6%**	**20.3%**	**0.0%**	**13.2%**	**5.4%**	**0.0%**	**n/a**
Morrisons, Letchworth GC	5.1%	35.0%	0.0%	2.8%	0.0%	0.0%	0.3%	0.0%	2.8%	0.0%	0.0%	5.0%
Iceland, Letchworth GC	0.0%	1.3%	0.0%	5.8%	0.0%	0.0%	0.4%	0.0%	0.4%	0.0%	0.0%	5.0%
Sainsbury, Letchworth GC	7.9%	24.5%	0.0%	10.5%	0.0%	5.0%	0.0%	0.0%	6.8%	0.2%	0.0%	5.0%
Lidl, Letchworth GC	2.3%	12.3%	0.0%	11.7%	0.0%	1.7%	0.4%	0.0%	2.8%	0.1%	0.0%	5.0%
Other Letchworth GC	0.2%	9.1%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	5.0%
Letchworth GC Sub-Total	**15.5%**	**82.2%**	**0.0%**	**31.2%**	**0.0%**	**6.7%**	**1.1%**	**0.0%**	**12.9%**	**0.3%**	**0.0%**	**n/a**
Morrison's, Royston	0.0%	0.0%	0.0%	0.0%	0.0%	13.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Tesco, Old North Road	0.0%	0.0%	0.0%	2.1%	0.0%	39.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Royston	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	0.3%	0.0%	0.0%	0.0%	0.0%	5.0%
Royston Sub-Total	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**0.0%**	**64.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**n/a**
Tesco Extra, Baldock	1.7%	9.5%	0.0%	47.4%	0.0%	1.9%	0.2%	0.0%	7.1%	0.0%	0.0%	15.0%
Other Baldock	0.0%	0.1%	0.0%	5.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Baldock Sub-Total	**1.7%**	**9.6%**	**0.0%**	**52.6%**	**0.0%**	**1.9%**	**0.2%**	**0.0%**	**7.1%**	**0.0%**	**0.0%**	**n/a**
Other North Hertfordshire	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	14.8%	0.0%	0.0%	0.0%	0.0%	1.0%
North Letchworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
North Baldock UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	0.0%	0.0%	0.0%	1.0%
East Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	1.0%
District Area Total	**88.6%**	**95.8%**	**0.0%**	**93.7%**	**0.0%**	**74.0%**	**36.7%**	**30.0%**	**33.2%**	**5.7%**	**30.0%**	**n/a**
Stevenage	10.3%	2.6%	0.0%	0.3%	0.0%	0.7%	45.9%	70.0%	3.6%	0.1%	0.0%	n/a
Cambridge	0.0%	0.3%	0.0%	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Luton	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	30.3%	70.0%	n/a
Welwyn Garden City	0.6%	0.1%	0.0%	0.9%	0.0%	0.4%	10.2%	0.0%	0.0%	12.1%	0.0%	n/a
Other	0.3%	1.2%	0.0%	4.9%	0.0%	24.0%	5.7%	0.0%	63.2%	51.8%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***0.0%***	***100.0%***	***0.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	**n/a**

Source: *Market shares based on NEMS 2016 household survey results*

Table 5: Base Year Convenience Expenditure 2016 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext	% Inflow	Total Expend
Expenditure 2016	**£70.99**	**£75.81**	**£0.00**	**£29.21**	**£0.00**	**£102.71**	**£55.78**	**£0.00**	**£94.89**	**£88.86**	**£0.00**	**n/a**	**£518.25**
Waitrose, Hitchin	£15.48	£2.20	£0.00	£0.53	£0.00	£0.62	£2.68	£0.00	£4.93	£2.75	£0.00	£1.54	£30.72
M &S Simply Food, Hitchin	£3.41	£0.45	£0.00	£0.18	£0.00	£0.00	£0.33	£0.00	£0.28	£0.80	£0.00	£0.29	£5.74
Sainsbury, Hitchin	£20.94	£0.38	£0.00	£0.15	£0.00	£0.00	£4.52	£0.00	£7.02	£0.89	£0.00	£1.78	£35.68
Netto, Hithcin	£6.11	£0.00	£0.00	£0.00	£0.00	£0.00	£1.51	£0.00	£0.28	£0.00	£0.00	£0.42	£8.31
Iceland, Hitchin	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.18	£0.00	£0.05	£1.03
Other Hitchin	£4.40	£0.00	£0.00	£0.00	£0.00	£0.00	£1.84	£0.00	£0.00	£0.18	£0.00	£0.34	£6.76
Hitchin Sub-Total	**£50.69**	**£3.03**	**£0.00**	**£0.85**	**£0.00**	**£0.62**	**£11.32**	**£0.00**	**£12.53**	**£4.80**	**£0.00**	**£4.41**	**£88.24**
Morrisons, Letchworth GC	£3.62	£26.53	£0.00	£0.82	£0.00	£0.00	£0.17	£0.00	£2.66	£0.00	£0.00	£1.78	£35.57
Iceland, Letchworth GC	£0.00	£0.99	£0.00	£1.69	£0.00	£0.00	£0.22	£0.00	£0.38	£0.00	£0.00	£0.17	£3.46
Sainsbury, Letchworth GC	£5.61	£18.57	£0.00	£3.07	£0.00	£5.14	£0.00	£0.00	£6.45	£0.18	£0.00	£2.05	£41.07
Lidl, Letchworth GC	£1.63	£9.32	£0.00	£3.42	£0.00	£1.75	£0.22	£0.00	£2.66	£0.09	£0.00	£1.00	£20.09
Other Letchworth GC	£0.14	£6.90	£0.00	£0.12	£0.00	£0.00	£0.00	£0.00	£0.09	£0.00	£0.00	£0.38	£7.63
Letchworth GC Sub-Total	**£11.00**	**£62.31**	**£0.00**	**£9.11**	**£0.00**	**£6.88**	**£0.61**	**£0.00**	**£12.24**	**£0.27**	**£0.00**	**£5.39**	**£107.83**
Morrison's, Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£14.28	£0.00	£0.00	£0.00	£0.00	£0.00	£0.75	£15.03
Tesco, Old North Road	£0.00	£0.00	£0.00	£0.61	£0.00	£40.98	£0.00	£0.00	£0.00	£0.00	£0.00	£2.19	£43.78
Other Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£11.30	£0.17	£0.00	£0.00	£0.00	£0.00	£0.60	£12.07
Royston Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.61**	**£0.00**	**£66.56**	**£0.17**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£3.54**	**£70.88**
Tesco Extra, Baldock	£1.21	£7.20	£0.00	£13.85	£0.00	£1.95	£0.11	£0.00	£6.74	£0.00	£0.00	£5.48	£36.54
Other Baldock	£0.00	£0.08	£0.00	£1.52	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£1.68
Baldock Sub-Total	**£1.21**	**£7.28**	**£0.00**	**£15.36**	**£0.00**	**£1.95**	**£0.11**	**£0.00**	**£6.74**	**£0.00**	**£0.00**	**£5.56**	**£38.21**
Other North Hertfordshire	£0.00	£0.00	£0.00	£1.43	£0.00	£0.00	£8.26	£0.00	£0.00	£0.00	£0.00	£0.10	£9.78
North Letchworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
North Baldock UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stevenage UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
East Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
District Area Total	**£62.90**	**£72.62**	**£0.00**	**£27.37**	**£0.00**	**£76.01**	**£20.47**	**£0.00**	**£31.50**	**£5.06**	**£0.00**	**£19.01**	**£314.95**
Stevenage	£7.31	£1.97	£0.00	£0.09	£0.00	£0.72	£25.60	£0.00	£3.42	£0.09	£0.00	n/a	£39.20
Cambridge	£0.00	£0.23	£0.00	£0.06	£0.00	£0.92	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.21
Luton	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.84	£0.00	£0.00	£26.92	£0.00	n/a	£27.90
Welwyn Garden City	£0.43	£0.08	£0.00	£0.26	£0.00	£0.41	£5.69	£0.00	£0.00	£10.75	£0.00	n/a	£17.62
Other	£0.21	£0.91	£0.00	£1.43	£0.00	£24.65	£3.18	£0.00	£59.97	£46.03	£0.00	n/a	£136.38
Other Sub Total	**£8.09**	**£3.18**	**£0.00**	**£1.84**	**£0.00**	**£26.71**	**£35.31**	**£0.00**	**£63.39**	**£83.79**	**£0.00**	**n/a**	**£222.31**
Total Expenditure	**£70.99**	**£75.81**	**£0.00**	**£29.21**	**£0.00**	**£102.71**	**£55.78**	**£0.00**	**£94.89**	**£88.86**	**£0.00**	**n/a**	**£537.26**

Source: *Table 3 and Table 4*

Table 6: Future Convenience Shopping Penetration Rates 2021-2031

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff'd/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Waitrose, Hitchin	21.8%	2.9%	0.0%	1.8%	0.0%	0.6%	4.8%	0.0%	5.2%	3.1%	0.0%	5.0%
M&S Simply Food, Hitchin	4.8%	0.6%	0.0%	0.6%	0.0%	0.0%	0.6%	0.0%	0.3%	0.9%	0.0%	5.0%
Sainsbury, Hitchin	29.5%	0.5%	0.0%	0.5%	0.0%	0.0%	8.1%	0.0%	7.4%	1.0%	0.0%	5.0%
Asda, Hithcin	8.6%	0.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.3%	0.0%	0.0%	5.0%
Iceland, Hitchin	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	0.2%	0.0%	5.0%
Other Hitchin	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	3.3%	0.0%	0.0%	0.2%	0.0%	5.0%
Hitchin Sub-Total	**71.4%**	**4.0%**	**0.0%**	**2.9%**	**0.0%**	**0.6%**	**20.3%**	**0.0%**	**13.2%**	**5.4%**	**0.0%**	**n/a**
Morrisons, Letchworth GC	5.1%	34.0%	25.0%	2.8%	0.0%	0.0%	0.3%	0.0%	2.8%	0.0%	0.0%	5.0%
Iceland, Letchworth GC	0.0%	1.3%	0.0%	5.8%	5.0%	0.0%	0.4%	0.0%	0.4%	0.0%	0.0%	5.0%
Sainsbury, Letchworth GC	7.9%	23.5%	15.0%	10.5%	7.0%	5.0%	0.0%	0.0%	6.8%	0.2%	0.0%	5.0%
Lidl, Letchworth GC	2.3%	12.3%	10.0%	11.7%	8.0%	1.7%	0.4%	0.0%	2.8%	0.1%	0.0%	5.0%
Other Letchworth GC	0.2%	9.1%	5.0%	0.4%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	5.0%
Letchworth GC Sub-Total	**15.5%**	**80.2%**	**55.0%**	**31.2%**	**20.0%**	**6.7%**	**1.1%**	**0.0%**	**12.9%**	**0.3%**	**0.0%**	**n/a**
Morrison's, Royston	0.0%	0.0%	0.0%	0.0%	0.0%	13.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Tesco, Old North Road	0.0%	0.0%	0.0%	2.1%	0.0%	39.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Other Royston	0.0%	0.0%	0.0%	0.0%	0.0%	11.0%	0.3%	0.0%	0.0%	0.0%	0.0%	5.0%
Royston Sub-Total	**0.0%**	**0.0%**	**0.0%**	**2.1%**	**0.0%**	**64.8%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**n/a**
Tesco Extra, Baldock	1.7%	9.5%	10.0%	41.6%	40.0%	1.9%	0.2%	0.0%	7.1%	0.0%	0.0%	15.0%
Other Baldock	0.0%	0.1%	0.0%	5.0%	5.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Baldock Sub-Total	**1.7%**	**9.6%**	**10.0%**	**46.6%**	**45.0%**	**1.9%**	**0.2%**	**0.0%**	**7.1%**	**0.0%**	**0.0%**	**n/a**
Other North Hertfordshire	0.0%	0.0%	0.0%	4.9%	0.0%	0.0%	14.8%	0.0%	0.0%	0.0%	0.0%	1.0%
North Letchworth UE	0.0%	1.0%	30.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
North Baldock UE	0.0%	1.0%	0.0%	5.0%	30.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	0.0%	0.0%	0.0%	1.0%
East Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	30.0%	1.0%
District Area Total	**88.6%**	**95.8%**	**95.0%**	**93.7%**	**95.0%**	**74.0%**	**36.7%**	**30.0%**	**33.2%**	**5.7%**	**30.0%**	**n/a**
Stevenage	10.3%	2.6%	5.0%	0.3%	0.0%	0.7%	45.9%	70.0%	3.6%	0.1%	0.0%	n/a
Cambridge	0.0%	0.3%	0.0%	0.2%	0.0%	0.9%	0.0%	0.0%	0.0%	0.0%	0.0%	n/a
Luton	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.5%	0.0%	0.0%	30.3%	70.0%	n/a
Welwyn Garden City	0.6%	0.1%	0.0%	0.9%	0.0%	0.4%	10.2%	0.0%	0.0%	12.1%	0.0%	n/a
Other	0.3%	1.2%	0.0%	4.9%	5.0%	24.0%	5.7%	0.0%	63.2%	51.8%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	**n/a**

Source: *Market shares based on NEMS 2016 household survey results and NLP estimates for urban extensions*

Table 7: Future Convenience Expenditure 2021 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext	% Inflow	Total Expend
Expenditure 2021	**£71.24**	**£76.80**	**£1.36**	**£29.48**	**£2.13**	**£108.43**	**£55.64**	**£1.73**	**£100.08**	**£92.96**	**£0.66**	**n/a**	**£540.50**
Waitrose, Hitchin	£15.53	£2.23	£0.00	£0.53	£0.00	£0.65	£2.67	£0.00	£5.20	£2.88	£0.00	£1.56	£31.26
M &S Simply Food, Hitchin	£3.42	£0.46	£0.00	£0.18	£0.00	£0.00	£0.33	£0.00	£0.30	£0.84	£0.00	£0.29	£5.82
Sainsbury, Hitchin	£21.02	£0.38	£0.00	£0.15	£0.00	£0.00	£4.51	£0.00	£7.41	£0.93	£0.00	£1.81	£36.20
Netto, Hithcin	£6.13	£0.00	£0.00	£0.00	£0.00	£0.00	£1.50	£0.00	£0.30	£0.00	£0.00	£0.42	£8.35
Iceland, Hitchin	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.19	£0.00	£0.05	£1.04
Other Hitchin	£4.42	£0.00	£0.00	£0.00	£0.00	£0.00	£1.84	£0.00	£0.00	£0.19	£0.00	£0.34	£6.78
Hitchin Sub-Total	**£50.87**	**£3.07**	**£0.00**	**£0.85**	**£0.00**	**£0.65**	**£11.30**	**£0.00**	**£13.21**	**£5.02**	**£0.00**	**£4.47**	**£89.44**
Morrisons, Letchworth GC	£3.63	£26.11	£0.34	£0.83	£0.00	£0.00	£0.17	£0.00	£2.80	£0.00	£0.00	£1.78	£35.66
Iceland, Letchworth GC	£0.00	£1.00	£0.00	£1.71	£0.11	£0.00	£0.22	£0.00	£0.40	£0.00	£0.00	£0.18	£3.62
Sainsbury, Letchworth GC	£5.63	£18.05	£0.20	£3.09	£0.15	£5.42	£0.00	£0.00	£6.81	£0.19	£0.00	£2.08	£41.62
Lidl, Letchworth GC	£1.64	£9.45	£0.14	£3.45	£0.17	£1.84	£0.22	£0.00	£2.80	£0.09	£0.00	£1.04	£20.84
Other Letchworth GC	£0.14	£6.99	£0.07	£0.12	£0.00	£0.00	£0.00	£0.00	£0.10	£0.00	£0.00	£0.39	£7.81
Letchworth GC Sub-Total	**£11.04**	**£61.59**	**£0.75**	**£9.20**	**£0.43**	**£7.26**	**£0.61**	**£0.00**	**£12.91**	**£0.28**	**£0.00**	**£5.48**	**£109.55**
Morrison's, Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£15.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.79	£15.86
Tesco, Old North Road	£0.00	£0.00	£0.00	£0.62	£0.00	£43.26	£0.00	£0.00	£0.00	£0.00	£0.00	£2.31	£46.19
Other Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£11.93	£0.17	£0.00	£0.00	£0.00	£0.00	£0.64	£12.73
Royston Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.62**	**£0.00**	**£70.26**	**£0.17**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£3.74**	**£74.79**
Tesco Extra, Baldock	£1.21	£7.30	£0.14	£12.26	£0.85	£2.06	£0.11	£0.00	£7.11	£0.00	£0.00	£5.48	£36.51
Other Baldock	£0.00	£0.08	£0.00	£1.47	£0.11	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.09	£1.74
Baldock Sub-Total	**£1.21**	**£7.37**	**£0.14**	**£13.74**	**£0.96**	**£2.06**	**£0.11**	**£0.00**	**£7.11**	**£0.00**	**£0.00**	**£5.56**	**£38.25**
Other North Hertfordshire	£0.00	£0.00	£0.00	£1.44	£0.00	£0.00	£8.24	£0.00	£0.00	£0.00	£0.00	£0.10	£9.78
North Letchworth UE	£0.00	£0.77	£0.41	£0.29	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£1.48
North Baldock UE	£0.00	£0.77	£0.00	£1.47	£0.64	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£2.91
Stevenage UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.01	£0.53
East Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.20	£0.00	£0.20
District Area Total	**£63.12**	**£73.57**	**£1.29**	**£27.62**	**£2.02**	**£80.24**	**£20.42**	**£0.52**	**£33.23**	**£5.30**	**£0.20**	**£19.40**	**£326.93**
Stevenage	£7.34	£2.00	£0.07	£0.09	£0.00	£0.76	£25.54	£1.21	£3.60	£0.09	£0.00	n/a	£40.70
Cambridge	£0.00	£0.23	£0.00	£0.06	£0.00	£0.98	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.27
Luton	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£0.00	£0.00	£28.17	£0.46	n/a	£29.60
Welwyn Garden City	£0.43	£0.08	£0.00	£0.27	£0.00	£0.43	£5.68	£0.00	£0.00	£11.25	£0.00	n/a	£18.13
Other	£0.21	£0.92	£0.00	£1.44	£0.11	£26.02	£3.17	£0.00	£63.25	£48.15	£0.00	n/a	£143.28
Other Sub Total	**£8.12**	**£3.23**	**£0.07**	**£1.86**	**£0.11**	**£28.19**	**£35.22**	**£1.21**	**£66.85**	**£87.66**	**£0.46**	**n/a**	**£232.98**
Total Expenditure	**£71.24**	**£76.80**	**£1.36**	**£29.48**	**£2.13**	**£108.43**	**£55.64**	**£1.73**	**£100.08**	**£92.96**	**£0.66**	**n/a**	**£559.91**

Source: *Table 3 and Table 6*

Table 8: Future Convenience Expenditure 2026 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext	% Inflow	Total Expend
Expenditure 2026	**£72.06**	**£77.14**	**£2.93**	**£29.69**	**£8.03**	**£113.30**	**£56.59**	**£7.46**	**£105.43**	**£97.22**	**£5.12**	**n/a**	**£574.98**
Waitrose, Hitchin	£15.71	£2.24	£0.00	£0.53	£0.00	£0.68	£2.72	£0.00	£5.48	£3.01	£0.00	£1.60	£31.97
M &S Simply Food, Hitchin	£3.46	£0.46	£0.00	£0.18	£0.00	£0.00	£0.34	£0.00	£0.32	£0.87	£0.00	£0.30	£5.93
Sainsbury, Hitchin	£21.26	£0.39	£0.00	£0.15	£0.00	£0.00	£4.58	£0.00	£7.80	£0.97	£0.00	£1.85	£37.00
Netto, Hithcin	£6.20	£0.00	£0.00	£0.00	£0.00	£0.00	£1.53	£0.00	£0.32	£0.00	£0.00	£0.42	£8.46
Iceland, Hitchin	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.45	£0.00	£0.00	£0.19	£0.00	£0.05	£1.06
Other Hitchin	£4.47	£0.00	£0.00	£0.00	£0.00	£0.00	£1.87	£0.00	£0.00	£0.19	£0.00	£0.34	£6.87
Hitchin Sub-Total	**£51.45**	**£3.09**	**£0.00**	**£0.86**	**£0.00**	**£0.68**	**£11.49**	**£0.00**	**£13.92**	**£5.25**	**£0.00**	**£4.56**	**£91.29**
Morrisons, Letchworth GC	£3.67	£26.23	£0.73	£0.83	£0.00	£0.00	£0.17	£0.00	£2.95	£0.00	£0.00	£1.82	£36.41
Iceland, Letchworth GC	£0.00	£1.00	£0.00	£1.72	£0.40	£0.00	£0.23	£0.00	£0.42	£0.00	£0.00	£0.20	£3.97
Sainsbury, Letchworth GC	£5.69	£18.13	£0.44	£3.12	£0.56	£5.66	£0.00	£0.00	£7.17	£0.19	£0.00	£2.16	£43.13
Lidl, Letchworth GC	£1.66	£9.49	£0.29	£3.47	£0.64	£1.93	£0.23	£0.00	£2.95	£0.10	£0.00	£1.09	£21.85
Other Letchworth GC	£0.14	£7.02	£0.15	£0.12	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.40	£7.93
Letchworth GC Sub-Total	**£11.17**	**£61.87**	**£1.61**	**£9.26**	**£1.61**	**£7.59**	**£0.62**	**£0.00**	**£13.60**	**£0.29**	**£0.00**	**£5.66**	**£113.29**
Morrison's, Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£15.75	£0.00	£0.00	£0.00	£0.00	£0.00	£0.83	£16.58
Tesco, Old North Road	£0.00	£0.00	£0.00	£0.62	£0.00	£45.21	£0.00	£0.00	£0.00	£0.00	£0.00	£2.41	£48.24
Other Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£12.46	£0.17	£0.00	£0.00	£0.00	£0.00	£0.66	£13.30
Royston Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.62**	**£0.00**	**£73.42**	**£0.17**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£3.91**	**£78.12**
Tesco Extra, Baldock	£1.22	£7.33	£0.29	£12.35	£3.21	£2.15	£0.11	£0.00	£7.49	£0.00	£0.00	£6.03	£40.19
Other Baldock	£0.00	£0.08	£0.00	£1.48	£0.40	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.10	£2.07
Baldock Sub-Total	**£1.22**	**£7.41**	**£0.29**	**£13.84**	**£3.62**	**£2.15**	**£0.11**	**£0.00**	**£7.49**	**£0.00**	**£0.00**	**£6.13**	**£42.26**
Other North Hertfordshire	£0.00	£0.00	£0.00	£1.45	£0.00	£0.00	£8.38	£0.00	£0.00	£0.00	£0.00	£0.10	£9.93
North Letchworth UE	£0.00	£0.77	£0.88	£0.30	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£1.97
North Baldock UE	£0.00	£0.77	£0.00	£1.48	£2.41	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£4.71
Stevenage UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.24	£0.00	£0.00	£0.00	£0.02	£2.26
East Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.54	£0.02	£1.55
District Area Total	**£63.84**	**£73.90**	**£2.79**	**£27.82**	**£7.63**	**£83.84**	**£20.77**	**£2.24**	**£35.00**	**£5.54**	**£1.54**	**£20.47**	**£345.38**
Stevenage	£7.42	£2.01	£0.15	£0.09	£0.00	£0.79	£25.98	£5.22	£3.80	£0.10	£0.00	n/a	£45.55
Cambridge	£0.00	£0.23	£0.00	£0.06	£0.00	£1.02	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.31
Luton	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.85	£0.00	£0.00	£29.46	£3.59	n/a	£34.04
Welwyn Garden City	£0.43	£0.08	£0.00	£0.27	£0.00	£0.45	£5.77	£0.00	£0.00	£11.76	£0.00	n/a	£18.77
Other	£0.22	£0.93	£0.00	£1.45	£0.40	£27.19	£3.23	£0.00	£66.63	£50.36	£0.00	n/a	£150.40
Other Sub Total	**£8.21**	**£3.24**	**£0.15**	**£1.87**	**£0.40**	**£29.46**	**£35.82**	**£5.22**	**£70.42**	**£91.68**	**£3.59**	**n/a**	**£250.06**
Total Expenditure	**£72.06**	**£77.14**	**£2.93**	**£29.69**	**£8.03**	**£113.30**	**£56.59**	**£7.46**	**£105.43**	**£97.22**	**£5.12**	**n/a**	**£595.45**

Source: *Table 3 and Table 6*

Table 9: Future Convenience Expenditure 2031 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A N.Letchworth	Zone 3 Baldock	Zone 3A N.Baldock	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext	% Inflow	Total Expend
Expenditure 2031	**£72.74**	**£77.24**	**£4.50**	**£29.80**	**£13.19**	**£116.88**	**£57.06**	**£11.73**	**£109.71**	**£100.58**	**£9.83**	**n/a**	**£603.26**
Waitrose, Hitchin	£15.86	£2.24	£0.00	£0.54	£0.00	£0.70	£2.74	£0.00	£5.71	£3.12	£0.00	£1.63	£32.52
M &S Simply Food, Hitchin	£3.49	£0.46	£0.00	£0.18	£0.00	£0.00	£0.34	£0.00	£0.33	£0.91	£0.00	£0.30	£6.01
Sainsbury, Hitchin	£21.46	£0.39	£0.00	£0.15	£0.00	£0.00	£4.62	£0.00	£8.12	£1.01	£0.00	£1.88	£37.62
Netto, Hithcin	£6.26	£0.00	£0.00	£0.00	£0.00	£0.00	£1.54	£0.00	£0.33	£0.00	£0.00	£0.43	£8.55
Iceland, Hitchin	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.46	£0.00	£0.00	£0.20	£0.00	£0.05	£1.08
Other Hitchin	£4.51	£0.00	£0.00	£0.00	£0.00	£0.00	£1.88	£0.00	£0.00	£0.20	£0.00	£0.35	£6.94
Hitchin Sub-Total	**£51.93**	**£3.09**	**£0.00**	**£0.86**	**£0.00**	**£0.70**	**£11.58**	**£0.00**	**£14.48**	**£5.43**	**£0.00**	**£4.64**	**£92.72**
Morrisons, Letchworth GC	£3.71	£26.26	£1.12	£0.83	£0.00	£0.00	£0.17	£0.00	£3.07	£0.00	£0.00	£1.85	£37.02
Iceland, Letchworth GC	£0.00	£1.00	£0.00	£1.73	£0.66	£0.00	£0.23	£0.00	£0.44	£0.00	£0.00	£0.21	£4.27
Sainsbury, Letchworth GC	£5.75	£18.15	£0.67	£3.13	£0.92	£5.84	£0.00	£0.00	£7.46	£0.20	£0.00	£2.22	£44.35
Lidl, Letchworth GC	£1.67	£9.50	£0.45	£3.49	£1.06	£1.99	£0.23	£0.00	£3.07	£0.10	£0.00	£1.13	£22.69
Other Letchworth GC	£0.15	£7.03	£0.22	£0.12	£0.00	£0.00	£0.00	£0.00	£0.11	£0.00	£0.00	£0.40	£8.03
Letchworth GC Sub-Total	**£11.27**	**£61.94**	**£2.47**	**£9.30**	**£2.64**	**£7.83**	**£0.63**	**£0.00**	**£14.15**	**£0.30**	**£0.00**	**£5.82**	**£116.36**
Morrison's, Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£16.25	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£17.10
Tesco, Old North Road	£0.00	£0.00	£0.00	£0.63	£0.00	£46.64	£0.00	£0.00	£0.00	£0.00	£0.00	£2.49	£49.75
Other Royston	£0.00	£0.00	£0.00	£0.00	£0.00	£12.86	£0.17	£0.00	£0.00	£0.00	£0.00	£0.69	£13.71
Royston Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.63**	**£0.00**	**£75.74**	**£0.17**	**£0.00**	**£0.00**	**£0.00**	**£0.00**	**£4.03**	**£80.57**
Tesco Extra, Baldock	£1.24	£7.34	£0.45	£12.40	£5.28	£2.22	£0.11	£0.00	£7.79	£0.00	£0.00	£6.50	£43.32
Other Baldock	£0.00	£0.08	£0.00	£1.49	£0.66	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.12	£2.34
Baldock Sub-Total	**£1.24**	**£7.41**	**£0.45**	**£13.89**	**£5.93**	**£2.22**	**£0.11**	**£0.00**	**£7.79**	**£0.00**	**£0.00**	**£6.62**	**£45.66**
Other North Hertfordshire	£0.00	£0.00	£0.00	£1.46	£0.00	£0.00	£8.44	£0.00	£0.00	£0.00	£0.00	£0.10	£10.01
North Letchworth UE	£0.00	£0.77	£1.35	£0.30	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£2.44
North Baldock UE	£0.00	£0.77	£0.00	£1.49	£3.96	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.06	£6.28
Stevenage UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.52	£0.00	£0.00	£0.00	£0.04	£3.56
East Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.95	£0.03	£2.98
District Area Total	**£64.44**	**£73.99**	**£4.27**	**£27.93**	**£12.53**	**£86.49**	**£20.94**	**£3.52**	**£36.42**	**£5.73**	**£2.95**	**£21.35**	**£360.57**
Stevenage	£7.49	£2.01	£0.22	£0.09	£0.00	£0.82	£26.19	£8.21	£3.95	£0.10	£0.00	n/a	£49.09
Cambridge	£0.00	£0.23	£0.00	£0.06	£0.00	£1.05	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£1.34
Luton	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.86	£0.00	£0.00	£30.48	£6.88	n/a	£38.36
Welwyn Garden City	£0.44	£0.08	£0.00	£0.27	£0.00	£0.47	£5.82	£0.00	£0.00	£12.17	£0.00	n/a	£19.24
Other	£0.22	£0.93	£0.00	£1.46	£0.66	£28.05	£3.25	£0.00	£69.34	£52.10	£0.00	n/a	£156.01
Other Sub Total	**£8.29**	**£3.24**	**£0.22**	**£1.88**	**£0.66**	**£30.39**	**£36.12**	**£8.21**	**£73.29**	**£94.85**	**£6.88**	**n/a**	**£264.03**
Total Expenditure	**£72.74**	**£77.24**	**£4.50**	**£29.80**	**£13.19**	**£116.88**	**£57.06**	**£11.73**	**£109.71**	**£100.58**	**£9.83**	**n/a**	**£624.61**

Source: *Table 3 and Table 6*

Table 10: Convenience Goods Floorspace and Benchmark Turnover (2014 Prices)

Town		Net Sales Floorspace Sq M	% Convenience Sales	Convenience Sales Floorspace Sq M	Turnover to Sales Floorspace Density Per Sq M	Total Convenience Turnover £M
Hitchin	Waitrose, Town Centre	2,375	90%	2,138	£11,665	£24.93
	Marks & Spencer Simply Food	331	100%	331	£10,329	£3.42
	Sainsbury's, Whinbush Road	2,308	85%	1,962	£11,690	£22.93
	Asda, Town Centre	712	95%	676	£15,213	£10.29
	Iceland, Town Centre	473	95%	449	£7,933	£3.56
	Other town centre	1,100	100%	1,100	£5,000	£5.50
	Tesco Express, Station Lyon Court	278	95%	264	£11,058	£2.92
	Local shops	650	100%	650	£5,000	£3.25
	Total	**8,227**		**7,570**	**£10,147**	**£76.81**
Letchworth Garden City	Morrison's, Town Centre	3,005	85%	2,554	£10,849	£27.71
	Sainsbury Local, Town Centre	197	95%	187	£11,690	£2.19
	Iceland, Town Centre	468	95%	445	£7,933	£3.53
	Other town centre	2,230	95%	2,119	£5,000	£10.59
	Sainsbury, Third Avenue	4,116	75%	3,087	£11,690	£36.09
	Tesco Express, Bedford Road	244	95%	232	£11,058	£2.56
	Tesco Express, Southfields Road	416	95%	395	£11,058	£4.37
	Iceland, Plinston Retail Park	450	95%	428	£7,933	£3.39
	Lidl, Jubilee Road	1,400	80%	1,120	£7,723	£8.65
	Local shops	760	100%	760	£5,000	£3.80
	Total	**13,286**		**11,326**	**£9,084**	**£102.88**
Royston	Morrison's, Town Centre	1,239	90%	1,115	£10,849	£12.10
	Tesco Express, Town Centre	273	95%	259	£11,058	£2.87
	Other town centre	450	100%	450	£5,000	£2.25
	Tesco, Old North Road	5,040	75%	3,780	£11,058	£41.80
	Local shops	100	100%	100	£5,000	£0.50
	Total	**7,102**		**5,704**	**£10,433**	**£59.51**
Baldock	Tesco Extra, High Street	5,719	56%	3,195	£11,058	£35.33
	Other town centre	620	100%	620	£5,000	£3.10
	Local shops	100	100%	100	£5,000	£0.50
	Total	**6,439**		**3,915**	**£9,944**	**£38.93**
GRAND TOTAL		**35,054**		**28,516**	**£9,754**	**£278.14**
		Comparison Sales Floorspace in Food Stores Sq M Net				**6,538**

Sources: *IGD Food Store Directory, VOA, ORC StorePoint Food Store Directory*
North Hertfordshire Floorspace Survey April 2015 *Mintel Sales densities for food stores*

Table 11: Convenience Goods Surplus Expenditure 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Available Expenditure				
Hitchin	£88.24	£89.44	£91.29	£92.72
Letchworth Garden City	£107.83	£109.55	£113.29	£116.36
Royston	£70.88	£74.79	£78.12	£80.57
Baldock	£38.21	£38.25	£42.26	£45.66
Other North Hertfordshire	£9.78	£9.78	£9.93	£10.01
North Letchworth UE	£0.00	£1.48	£1.97	£2.44
North Baldock UE	£0.00	£2.91	£4.71	£6.28
Stevenage UE	£0.00	£0.53	£2.26	£3.56
East Luton UE	£0.00	£0.20	£1.55	£2.98
North Hertfordshire Total	**£314.95**	**£326.93**	**£345.38**	**£360.57**
Benchmark Turnover Existing				
Hitchin	£76.81	£76.81	£76.81	£76.81
Letchworth Garden City	£102.88	£102.88	£102.88	£102.88
Royston	£59.51	£59.51	£59.51	£59.51
Baldock	£38.93	£38.93	£38.93	£38.93
Other North Hertfordshire	£9.78	£9.78	£9.78	£9.78
North Letchworth UE	£0.00	£0.00	£0.00	£0.00
North Baldock UE	£0.00	£0.00	£0.00	£0.00
Stevenage UE	£0.00	£0.00	£0.00	£0.00
East Luton UE	£0.00	£0.00	£0.00	£0.00
North Hertfordshire Total	**£287.92**	**£287.92**	**£287.92**	**£287.92**
Expenditure Deficit/Surplus				
Hitchin	£11.43	£12.63	£14.48	£15.91
Letchworth Garden City	£4.95	£6.67	£10.41	£13.48
Royston	£11.37	£15.27	£18.60	£21.05
Baldock	-£0.72	-£0.68	£3.33	£6.73
Other North Hertfordshire	£0.00	-£0.01	£0.15	£0.22
North Letchworth UE	£0.00	£1.48	£1.97	£2.44
North Baldock UE	£0.00	£2.91	£4.71	£6.28
Stevenage UE	£0.00	£0.53	£2.26	£3.56
East Luton UE	£0.00	£0.20	£1.55	£2.98
North Hertfordshire Total	**£27.03**	**£39.01**	**£57.46**	**£72.65**

Source: Tables 1 and 5 to 10

Table 12: Convenience Floorspace Projections 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Expenditure Deficit/Surplus				
Hitchin	£11.43	£12.63	£14.48	£15.91
Letchworth Garden City	£4.95	£6.67	£10.41	£13.48
Royston	£11.37	£15.27	£18.60	£21.05
Baldock	-£0.72	-£0.68	£3.33	£6.73
Other North Hertfordshire	£0.00	-£0.01	£0.15	£0.22
North Letchworth UE	£0.00	£1.48	£1.97	£2.44
North Baldock UE	£0.00	£2.91	£4.71	£6.28
Stevenage UE	£0.00	£0.53	£2.26	£3.56
East Luton UE	£0.00	£0.20	£1.55	£2.98
North Hertfordshire Total	**£27.03**	**£39.01**	**£57.46**	**£72.65**
Turnover Density of New Floorspace £ per sq m*	£12,095	£12,095	£12,095	£12,095
New Sales Floorspace Sq M Net				
Hitchin	945	1,044	1,197	1,315
Letchworth Garden City	409	551	861	1,114
Royston	940	1,263	1,538	1,740
Baldock	-59	-56	275	557
Other North Hertfordshire	0	-1	12	18
North Letchworth UE	0	123	163	202
North Baldock UE	0	241	390	519
Stevenage UE	0	43	187	294
East Luton UE	0	16	128	246
North Hertfordshire Total	**2,235**	**3,225**	**4,751**	**6,007**
Gross Floorspace Sq M				
Hitchin	1,350	1,492	1,711	1,879
Letchworth Garden City	584	787	1,229	1,592
Royston	1,343	1,804	2,197	2,486
Baldock	-85	-80	393	795
Other North Hertfordshire	0	-1	17	26
North Letchworth UE	0	175	232	289
North Baldock UE	0	344	557	742
Stevenage UE	0	62	267	420
East Luton UE	0	24	183	352
North Hertfordshire Total	**3,193**	**4,607**	**6,787**	**8,581**

** average sales density for four main food store operators (Asda, Morrison's, Sainsbury's, Tesco and Waitrose)*

Appendix 3 Comparison Goods Capacity

Table 1 : Population Projections

	2011	2016	2021	2026	2031
1 - Hitchin	32,689	34,255	34,670	35,112	35,566
2 - Letchworth Garden City	35,086	36,766	37,566	37,783	37,961
2A - North Letchworth Urban Extension	0	0	663	1,437	2,210
3 - Baldock	12,907	13,525	13,765	13,883	13,985
3A - North Baldock	0	0	995	3,757	6,188
4 - Royston	42,884	45,128	48,048	50,272	52,044
5 - North Herts South (Rural)	23,876	25,029	25,183	25,647	25,947
5A - Stevenage/Knebworth Urban Extensions	0	0	815	3,510	5,540
6 - Shefford/Stotfold	40,504	43,643	46,423	48,967	51,136
7 - East of Luton	41,038	43,278	45,663	47,819	49,645
7A - Luton Urban Extension	0	0	309	2,409	4,641
	228,984	**241,623**	**254,100**	**270,596**	**284,862**

Sources:

Experian Census Population 2011
N.Herts District (16,500 new dwellings and 30,982 between 2011 and 2031)
Distribution of population based on NHDC housing developments
ONS 2014 SNPP Population Projections for neighbouring authorities

Table 2: Comparison Goods Expenditure Per Capita (2014 Prices)

Expenditure Per Capita	2016	2021	2026	2031
1 - Hitchin	£3,223	£3,646	£4,283	£5,038
2 - Letchworth Garden City	£3,002	£3,396	£3,989	£4,691
2A - North Letchworth Urban Extension	£3,002	£3,396	£3,989	£4,691
3 - Baldock	£3,359	£3,800	£4,464	£5,250
3A - North Baldock	£3,359	£3,800	£4,464	£5,250
4 - Royston	£3,760	£4,253	£4,996	£5,876
5 - North Herts South (Rural)	£3,834	£4,338	£5,096	£5,993
5A - Stevenage/Knebworth Urban Extensions	£3,438	£3,889	£4,568	£5,373
6 - Shefford/Stotfold	£3,643	£4,121	£4,841	£5,694
7 - East of Luton	£3,242	£3,667	£4,308	£5,066
7A - Luton Urban Extension	£3,438	£3,889	£4,568	£5,373

Sources:

Experian local estimates of 2014 comparison goods expenditure per capita
Excluding special forms of trading.
Experian Business Strategies - forecast annual growth rates (Briefing Note 13)

Table 3: Total Available Comparison Goods Expenditure (£M - 2014 Prices)

Zone	2016	2021	2026	2031
1 - Hitchin	£110.41	£126.42	£150.39	£179.16
2 - Letchworth Garden City	£110.36	£127.56	£150.72	£178.09
2A - North Letchworth UE	£0.00	£2.25	£5.73	£10.37
3 - Baldock	£45.43	£52.31	£61.98	£73.42
3A - North Baldock UE	£0.00	£3.78	£16.77	£32.49
4 - Royston	£169.66	£204.35	£251.16	£305.80
5 - North Herts South (Rural)	£95.97	£109.24	£130.69	£155.50
5A - Stevenage/Knebworth UE	£0.00	£3.17	£16.03	£29.77
6 - Shefford/Stotfold	£158.99	£191.32	£237.06	£291.15
7 - East of Luton	£140.29	£167.45	£206.00	£251.52
7A - Luton Urban Extension	£0.00	£1.20	£11.00	£24.94
Total	**£831.12**	**£989.05**	**£1,237.54**	**£1,532.20**

Sources: *Table 1 and Table 2*

Table 4: Base year Comparison Shopping Penetration Rates 2016

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Hitchin	41.7%	10.4%	0.0%	3.8%	0.0%	0.3%	16.7%	0.0%	18.3%	4.7%	0.0%	5.0%
Letchworth Garden City	6.5%	46.7%	0.0%	27.2%	0.0%	2.9%	2.5%	0.0%	9.5%	0.3%	0.0%	5.0%
Royston	0.0%	0.1%	0.0%	1.1%	0.0%	26.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Baldock	0.5%	3.8%	0.0%	19.9%	0.0%	0.8%	0.1%	0.0%	0.9%	0.0%	0.0%	5.0%
Other North Hertfordshire	0.3%	0.0%	0.0%	2.5%	0.0%	0.3%	4.4%	0.0%	0.0%	0.1%	0.0%	1.0%
North Letchworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Baldock UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage/Knebworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
District Area Total	**49.0%**	**61.0%**	**0.0%**	**54.5%**	**0.0%**	**31.2%**	**23.7%**	**0.0%**	**28.7%**	**5.1%**	**0.0%**	**n/a**
Stevenage	22.4%	20.3%	0.0%	16.7%	0.0%	10.5%	35.0%	0.0%	17.9%	2.2%	0.0%	n/a
Cambridge	3.2%	3.9%	0.0%	8.9%	0.0%	43.4%	1.2%	0.0%	1.0%	0.0%	0.0%	n/a
Luton	2.1%	1.0%	0.0%	0.0%	0.0%	0.4%	1.6%	0.0%	4.7%	27.0%	0.0%	n/a
Welwyn Garden City	12.2%	7.6%	0.0%	8.8%	0.0%	1.6%	22.6%	0.0%	3.5%	23.7%	0.0%	n/a
Other	11.1%	6.2%	0.0%	11.1%	0.0%	12.9%	15.9%	0.0%	44.2%	42.0%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***0.0%***	***100.0%***	***0.0%***	***100.0%***	***100.0%***	***0.0%***	***100.0%***	***100.0%***	***0.0%***	**n/a**

Source: *Market shares based on NEMS 2016 household survey results*

Table 5: Base Year Comparison Expenditure 2016 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2016	**£110.41**	**£110.36**	**£0.00**	**£45.43**	**£0.00**	**£169.66**	**£95.97**	**£0.00**	**£158.99**	**£140.29**	**£0.00**	**n/a**	**£831.12**
Hitchin	£46.04	£11.48	£0.00	£1.73	£0.00	£0.51	£16.03	£0.00	£29.10	£6.59	£0.00	£5.87	£117.34
Letchworth Garden City	£7.18	£51.54	£0.00	£12.36	£0.00	£4.92	£2.40	£0.00	£15.10	£0.42	£0.00	£4.94	£98.86
Royston	£0.00	£0.11	£0.00	£0.50	£0.00	£45.64	£0.00	£0.00	£0.00	£0.00	£0.00	£2.43	£48.68
Baldock	£0.55	£4.19	£0.00	£9.04	£0.00	£1.36	£0.10	£0.00	£1.43	£0.00	£0.00	£0.88	£17.55
Other North Hertfordshire	£0.33	£0.00	£0.00	£1.14	£0.00	£0.51	£4.22	£0.00	£0.00	£0.14	£0.00	£0.06	£6.40
North Letchworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Baldock UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
District Area Total	**£54.10**	**£67.32**	**£0.00**	**£24.76**	**£0.00**	**£52.93**	**£22.75**	**£0.00**	**£45.63**	**£7.15**	**£0.00**	**£14.19**	**£288.83**
Stevenage	£24.73	£22.40	£0.00	£7.59	£0.00	£17.81	£33.59	£0.00	£28.46	£3.09	£0.00	n/a	£137.67
Cambridge	£3.53	£4.30	£0.00	£4.04	£0.00	£73.63	£1.15	£0.00	£1.59	£0.00	£0.00	n/a	£88.26
Luton	£2.32	£1.10	£0.00	£0.00	£0.00	£0.68	£1.54	£0.00	£7.47	£37.88	£0.00	n/a	£50.99
Welwyn Garden City	£13.47	£8.39	£0.00	£4.00	£0.00	£2.71	£21.69	£0.00	£5.56	£33.25	£0.00	n/a	£89.07
Other	£12.26	£6.84	£0.00	£5.04	£0.00	£21.89	£15.26	£0.00	£70.27	£58.92	£0.00	n/a	£190.48
Total Expenditure	**£110.41**	**£110.36**	**£0.00**	**£45.43**	**£0.00**	**£169.66**	**£95.97**	**£0.00**	**£158.99**	**£140.29**	**£0.00**	**n/a**	**£845.31**

Source: *Table 3 and Table 4*

Table 6: Future Comparison Shopping Penetration Rates 2021-2031

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Hitchin	41.7%	10.4%	0.0%	3.8%	0.0%	0.3%	16.7%	0.0%	18.3%	4.7%	0.0%	5.0%
Letchworth Garden City	6.5%	45.7%	40.0%	26.2%	18.0%	2.9%	2.5%	0.0%	9.5%	0.3%	0.0%	5.0%
Royston	0.0%	0.1%	0.0%	1.1%	0.0%	26.9%	0.0%	0.0%	0.0%	0.0%	0.0%	5.0%
Baldock	0.5%	3.8%	0.0%	18.9%	17.0%	0.8%	0.1%	0.0%	0.9%	0.0%	0.0%	5.0%
Other North Hertfordshire	0.3%	0.0%	0.0%	2.5%	0.0%	0.3%	4.4%	0.0%	0.0%	0.1%	0.0%	1.0%
North Letchworth UE	0.0%	1.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Baldock UE	0.0%	0.0%	0.0%	2.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage/Knebworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	0.0%	1.0%
Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	1.0%
District Area Total	**49.0%**	**61.0%**	**60.0%**	**54.5%**	**55.0%**	**31.2%**	**23.7%**	**20.0%**	**28.7%**	**5.1%**	**20.0%**	**n/a**
Stevenage	22.4%	20.3%	20.0%	16.7%	15.0%	10.5%	35.0%	80.0%	17.9%	2.2%	0.0%	n/a
Cambridge	3.2%	3.9%	5.0%	8.9%	10.0%	43.4%	1.2%	0.0%	1.0%	0.0%	0.0%	n/a
Luton	2.1%	1.0%	0.0%	0.0%	0.0%	0.4%	1.6%	0.0%	4.7%	27.0%	80.0%	n/a
Welwyn Garden City	12.2%	7.6%	10.0%	8.8%	10.0%	1.6%	22.6%	0.0%	3.5%	23.7%	0.0%	n/a
Other	11.1%	6.2%	5.0%	11.1%	10.0%	12.9%	15.9%	0.0%	44.2%	42.0%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	**n/a**

Source: *Market shares based on NEMS 2016 household survey results and NLP estimates for urban extensions*

Table 7: Future Comparison Expenditure 2021 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2021	**£126.42**	**£127.56**	**£2.25**	**£52.31**	**£3.78**	**£204.35**	**£109.24**	**£3.17**	**£191.32**	**£167.45**	**£1.20**	**n/a**	**£989.05**
Hitchin	£52.72	£13.27	£0.00	£1.99	£0.00	£0.61	£18.24	£0.00	£35.01	£7.87	£0.00	£6.83	£136.53
Letchworth Garden City	£8.22	£58.30	£0.90	£13.71	£0.68	£5.93	£2.73	£0.00	£18.18	£0.50	£0.00	£5.74	£114.88
Royston	£0.00	£0.13	£0.00	£0.58	£0.00	£54.97	£0.00	£0.00	£0.00	£0.00	£0.00	£2.93	£58.60
Baldock	£0.63	£4.85	£0.00	£9.89	£0.64	£1.63	£0.11	£0.00	£1.72	£0.00	£0.00	£1.02	£20.50
Other North Hertfordshire	£0.38	£0.00	£0.00	£1.31	£0.00	£0.61	£4.81	£0.00	£0.00	£0.17	£0.00	£0.07	£7.35
North Letchworth UE	£0.00	£1.28	£0.45	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£1.74
Baldock UE	£0.00	£0.00	£0.00	£1.05	£0.76	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£1.82
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.63	£0.00	£0.00	£0.00	£0.01	£0.64
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.24	£0.00	£0.24
District Area Total	**£61.94**	**£77.81**	**£1.35**	**£28.51**	**£2.08**	**£63.76**	**£25.89**	**£0.63**	**£54.91**	**£8.54**	**£0.24**	**£16.64**	**£342.31**
Stevenage	£28.32	£25.89	£0.45	£8.74	£0.57	£21.46	£38.23	£2.54	£34.25	£3.68	£0.00	n/a	£164.12
Cambridge	£4.05	£4.97	£0.11	£4.66	£0.38	£88.69	£1.31	£0.00	£1.91	£0.00	£0.00	n/a	£106.08
Luton	£2.65	£1.28	£0.00	£0.00	£0.00	£0.82	£1.75	£0.00	£8.99	£45.21	£0.96	n/a	£61.66
Welwyn Garden City	£15.42	£9.69	£0.23	£4.60	£0.38	£3.27	£24.69	£0.00	£6.70	£39.69	£0.00	n/a	£104.66
Other	£14.03	£7.91	£0.11	£5.81	£0.38	£26.36	£17.37	£0.00	£84.56	£70.33	£0.00	n/a	£226.86
Total Expenditure	**£126.42**	**£127.56**	**£2.25**	**£52.31**	**£3.78**	**£204.35**	**£109.24**	**£3.17**	**£191.32**	**£167.45**	**£1.20**	**n/a**	**£1,005.70**

Source: *Table 3 and Table 6*

Table 8: Future Comparison Expenditure 2026 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2026	**£150.39**	**£150.72**	**£5.73**	**£61.98**	**£16.77**	**£251.16**	**£130.69**	**£16.03**	**£237.06**	**£206.00**	**£11.00**	**n/a**	**£1,237.54**
Hitchin	£62.71	£15.67	£0.00	£2.36	£0.00	£0.75	£21.82	£0.00	£43.38	£9.68	£0.00	£8.23	£164.62
Letchworth Garden City	£9.78	£68.88	£2.29	£16.24	£3.02	£7.28	£3.27	£0.00	£22.52	£0.62	£0.00	£7.05	£140.94
Royston	£0.00	£0.15	£0.00	£0.68	£0.00	£67.56	£0.00	£0.00	£0.00	£0.00	£0.00	£3.60	£72.00
Baldock	£0.75	£5.73	£0.00	£11.71	£2.85	£2.01	£0.13	£0.00	£2.13	£0.00	£0.00	£1.33	£26.65
Other North Hertfordshire	£0.45	£0.00	£0.00	£1.55	£0.00	£0.75	£5.75	£0.00	£0.00	£0.21	£0.00	£0.09	£8.80
North Letchworth UE	£0.00	£1.51	£1.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.03	£2.68
Baldock UE	£0.00	£0.00	£0.00	£1.24	£3.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.05	£4.64
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£3.21	£0.00	£0.00	£0.00	£0.03	£3.24
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£2.20	£0.02	£2.22
District Area Total	**£73.69**	**£91.94**	**£3.44**	**£33.78**	**£9.22**	**£78.36**	**£30.97**	**£3.21**	**£68.04**	**£10.51**	**£2.20**	**£20.43**	**£425.78**
Stevenage	£33.69	£30.60	£1.15	£10.35	£2.52	£26.37	£45.74	£12.83	£42.43	£4.53	£0.00	n/a	£210.20
Cambridge	£4.81	£5.88	£0.29	£5.52	£1.68	£109.01	£1.57	£0.00	£2.37	£0.00	£0.00	n/a	£131.11
Luton	£3.16	£1.51	£0.00	£0.00	£0.00	£1.00	£2.09	£0.00	£11.14	£55.62	£8.80	n/a	£83.33
Welwyn Garden City	£18.35	£11.45	£0.57	£5.45	£1.68	£4.02	£29.53	£0.00	£8.30	£48.82	£0.00	n/a	£128.18
Other	£16.69	£9.34	£0.29	£6.88	£1.68	£32.40	£20.78	£0.00	£104.78	£86.52	£0.00	n/a	£279.36
Total Expenditure	**£150.39**	**£150.72**	**£5.73**	**£61.98**	**£16.77**	**£251.16**	**£130.69**	**£16.03**	**£237.06**	**£206.00**	**£11.00**	**n/a**	**£1,257.96**

Source: *Table 3 and Table 6*

Table 9: Future Comparison Expenditure 2031 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A NLUE	Zone 3 Baldock	Zone 3A BUE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2031	**£179.16**	**£178.09**	**£10.37**	**£73.42**	**£32.49**	**£305.80**	**£155.50**	**£29.77**	**£291.15**	**£251.52**	**£24.94**	**n/a**	**£1,532.20**
Hitchin	£74.71	£18.52	£0.00	£2.79	£0.00	£0.92	£25.97	£0.00	£53.28	£11.82	£0.00	£9.90	£197.90
Letchworth Garden City	£11.65	£81.39	£4.15	£19.24	£5.85	£8.87	£3.89	£0.00	£27.66	£0.75	£0.00	£8.60	£172.03
Royston	£0.00	£0.18	£0.00	£0.81	£0.00	£82.26	£0.00	£0.00	£0.00	£0.00	£0.00	£4.38	£87.63
Baldock	£0.90	£6.77	£0.00	£13.88	£5.52	£2.45	£0.16	£0.00	£2.62	£0.00	£0.00	£1.70	£33.98
Other North Hertfordshire	£0.54	£0.00	£0.00	£1.84	£0.00	£0.92	£6.84	£0.00	£0.00	£0.25	£0.00	£0.10	£10.49
North Letchworth UE	£0.00	£1.78	£2.07	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.04	£3.89
Baldock UE	£0.00	£0.00	£0.00	£1.47	£6.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£8.05
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£5.95	£0.00	£0.00	£0.00	£0.06	£6.01
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£4.99	£0.05	£5.04
District Area Total	**£87.79**	**£108.63**	**£6.22**	**£40.01**	**£17.87**	**£95.41**	**£36.85**	**£5.95**	**£83.56**	**£12.83**	**£4.99**	**£24.91**	**£525.03**
Stevenage	£40.13	£36.15	£2.07	£12.26	£4.87	£32.11	£54.42	£23.81	£52.12	£5.53	£0.00	n/a	£263.49
Cambridge	£5.73	£6.95	£0.52	£6.53	£3.25	£132.72	£1.87	£0.00	£2.91	£0.00	£0.00	n/a	£160.48
Luton	£3.76	£1.78	£0.00	£0.00	£0.00	£1.22	£2.49	£0.00	£13.68	£67.91	£19.95	n/a	£110.80
Welwyn Garden City	£21.86	£13.53	£1.04	£6.46	£3.25	£4.89	£35.14	£0.00	£10.19	£59.61	£0.00	n/a	£155.98
Other	£19.89	£11.04	£0.52	£8.15	£3.25	£39.45	£24.72	£0.00	£128.69	£105.64	£0.00	n/a	£341.34
Total Expenditure	**£179.16**	**£178.09**	**£10.37**	**£73.42**	**£32.49**	**£305.80**	**£155.50**	**£29.77**	**£291.15**	**£251.52**	**£24.94**	**n/a**	**£1,557.11**

Source: *Table 3 and Table 6*

Table 10 - Comparison Floorspace

Town	Location	Gross Floorspace Sq M	Net Sales Floorspace Sq M
Hitchin	Town centre comparison shops	30,250	19,663
	Comparison floorspace in food stores	n/a	657
	Family Bargains	2,499	2,124
	Hitchin Local Centres	890	623
	Hitchin Total		**23,067**
Letchworth Garden City	Town centre comparison shops	16,150	11,305
	Comparison floorspace in food stores	n/a	1,960
	Letchworth Local Centres	363	254
	Carpetright	500	400
	Topps Tiles	500	400
	Pets at Home, Plinston RP	984	836
	Family Bargains, Plinston RP	1,294	1,100
	Halfords, Plinston RP	777	660
	Wickes DIY Store, Plinston RP	2,425	2,183
	Letchworth Total		**19,098**
Royston	Town centre comparison shops	6,327	4,429
	Comparison floorspace in food stores	n/a	1,398
	Royston Total		**5,827**
Baldock	Town centre comparison shops	4,530	3,171
	Comparison floorspace in food stores	n/a	2,524
	Baldock Total		**5,695**
GRAND TOTAL	**GRAND TOTAL**	**n/a**	**53,687**

Sources: North Hertfordshire Floorspace Survey April 2015, Completely Retail and VOA

Table 11: Comparison Goods Surplus Expenditure 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Available Expenditure				
Hitchin	£117.34	£136.53	£164.62	£197.90
Letchworth Garden City	£98.86	£114.88	£140.94	£172.03
Royston	£48.68	£58.60	£72.00	£87.63
Baldock	£17.55	£20.50	£26.65	£33.98
Other North Hertfordshire	£6.40	£7.35	£8.80	£10.49
North Letchworth UE	£0.00	£1.74	£2.68	£3.89
Baldock UE	£0.00	£1.82	£4.64	£8.05
Stevenage/Knebworth UE	£0.00	£0.64	£3.24	£6.01
Luton UE	£0.00	£0.24	£2.22	£5.04
North Hertfordshire Total	**£288.83**	**£342.31**	**£425.78**	**£525.03**
Benchmark Turnover Existing				
Hitchin	£117.34	£129.55	£143.03	£157.92
Letchworth Garden City	£98.86	£109.15	£120.51	£133.05
Royston	£48.68	£53.75	£59.35	£65.52
Baldock	£17.55	£19.38	£21.39	£23.62
Other North Hertfordshire	£6.40	£7.07	£7.81	£8.62
North Letchworth UE	£0.00	£0.00	£0.00	£0.00
Baldock UE	£0.00	£0.00	£0.00	£0.00
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00
Luton UE	£0.00	£0.00	£0.00	£0.00
North Hertfordshire Total	**£288.83**	**£318.89**	**£352.09**	**£388.73**
Expenditure Deficit/Surplus				
Hitchin	n/a	£6.98	£21.58	£39.98
Letchworth Garden City	n/a	£5.73	£20.43	£38.98
Royston	n/a	£4.85	£12.65	£22.11
Baldock	n/a	£1.12	£5.26	£10.37
Other North Hertfordshire	n/a	£0.28	£0.99	£1.87
North Letchworth UE	n/a	£1.74	£2.68	£3.89
Baldock UE	n/a	£1.82	£4.64	£8.05
Stevenage/Knebworth UE	n/a	£0.64	£3.24	£6.01
Luton UE	n/a	£0.24	£2.22	£5.04
North Hertfordshire Total	**n/a**	**£23.41**	**£73.70**	**£136.30**

Source: Tables 1 and 5 to 8

Table 11: Comparison Floorspace Projections 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Expenditure Deficit/Surplus				
Hitchin	n/a	£6.98	£21.58	£39.98
Letchworth Garden City	n/a	£5.73	£20.43	£38.98
Royston	n/a	£4.85	£12.65	£22.11
Baldock	n/a	£1.12	£5.26	£10.37
Other North Hertfordshire	n/a	£0.28	£0.99	£1.87
North Letchworth UE	n/a	£1.74	£2.68	£3.89
Baldock UE	n/a	£1.82	£4.64	£8.05
Stevenage/Knebworth UE	n/a	£0.64	£3.24	£6.01
Luton UE	n/a	£0.24	£2.22	£5.04
North Hertfordshire Total	**n/a**	**£23.41**	**£73.70**	**£136.30**
Turnover Density of New Floorspace £ per sq m	£6,000	£6,624	£7,314	£8,075
New Sales Floorspace Sq M Net				
Hitchin	n/a	1,054	2,951	4,951
Letchworth Garden City	n/a	864	2,793	4,827
Royston	n/a	733	1,730	2,737
Baldock	n/a	170	719	1,284
Other North Hertfordshire	n/a	42	136	232
North Letchworth UE	n/a	263	366	482
Baldock UE	n/a	275	634	996
Stevenage/Knebworth UE	n/a	97	443	745
Luton UE	n/a	37	304	624
North Hertfordshire Total	**n/a**	**3,534**	**10,076**	**16,879**
Gross Floorspace Sq M				
Hitchin	n/a	1,406	3,935	6,602
Letchworth Garden City	n/a	1,153	3,724	6,436
Royston	n/a	977	2,306	3,650
Baldock	n/a	226	959	1,712
Other North Hertfordshire	n/a	56	181	309
North Letchworth UE	n/a	351	489	643
Baldock UE	n/a	366	846	1,329
Stevenage/Knebworth UE	n/a	129	590	993
Luton UE	n/a	49	405	832
North Hertfordshire Total	**n/a**	**4,713**	**13,435**	**22,505**

Appendix 4 Food and Beverage Capacity

Table 1 : Population Projections

	2011	2016	2021	2026	2031
1 - Hitchin	32,689	34,255	34,670	35,112	35,566
2 - Letchworth Garden City	35,086	36,766	37,566	37,783	37,961
2A - North Letchworth Urban Extension	0	0	663	1,437	2,210
3 - Baldock	12,907	13,525	13,765	13,883	13,985
3A - North Baldock	0	0	995	3,757	6,188
4 - Royston	42,884	45,128	48,048	50,272	52,044
5 - North Herts South (Rural)	23,876	25,029	25,183	25,647	25,947
5A - Stevenage/Knebworth Urban Extensions	0	0	815	3,510	5,540
6 - Shefford/Stotfold	40,504	43,643	46,423	48,967	51,136
7 - East of Luton	41,038	43,278	45,663	47,819	49,645
7A - Luton Urban Extension	0	0	309	2,409	4,641
	228,984	**241,623**	**254,100**	**270,596**	**284,862**

Sources:

Experian Census Population 2011
N.Herts District (16,500 new dwellings and 30,982 between 2011 and 2031)
Distribution of population based on NHDC housing developments
ONS 2014 SNPP Population Projections for neighbouring authorities

Table 2: Food and Beverage Per Capita (2014 Prices)

Expenditure Per Capita	2016	2021	2026	2031
1 - Hitchin	£1,234	£1,325	£1,419	£1,521
2 - Letchworth Garden City	£1,094	£1,174	£1,257	£1,347
2A - North Letchworth UE	£1,094	£1,174	£1,257	£1,347
3 - Baldock	£1,199	£1,286	£1,377	£1,476
3A - North Baldock	£1,199	£1,286	£1,377	£1,476
4 - Royston	£1,321	£1,417	£1,518	£1,627
5 - North Herts South (Rural)	£1,360	£1,459	£1,563	£1,675
5A - Stevenage/Knebworth UE	£1,232	£1,322	£1,416	£1,518
6 - Shefford/Stotfold	£1,238	£1,328	£1,422	£1,524
7 - East of Luton	£1,238	£1,328	£1,422	£1,524
7A - Luton UE	£1,232	£1,322	£1,416	£1,518

Sources: *Experian local estimates of 2014 food and beverage expenditure per capita*
Experian Business Strategies - forecast annual growth rates (Briefing Note 13)

Table 3: Total Food and Beverage Expenditure (£M - 2014 Prices)

Zone	2016	2021	2026	2031
1 - Hitchin	£42.29	£45.92	£49.81	£54.08
2 - Letchworth Garden City	£40.21	£44.09	£47.49	£51.15
2A - North Letchworth UE	£0.00	£0.78	£1.81	£2.98
3 - Baldock	£16.21	£17.70	£19.12	£20.65
3A - North Baldock	£0.00	£1.28	£5.17	£9.14
4 - Royston	£59.60	£68.09	£76.30	£84.67
5 - North Herts South (Rural)	£34.03	£36.74	£40.07	£43.46
5A - Stevenage/Knebworth UE	£0.00	£1.08	£4.97	£8.41
6 - Shefford/Stotfold	£54.01	£61.65	£69.64	£77.96
7 - East of Luton	£53.56	£60.64	£68.00	£75.68
7A - Luton UE	£0.00	£0.41	£3.41	£7.04
Total	**£299.91**	**£338.38**	**£385.79**	**£435.22**

Sources: *Table 1 and Table 2*

Table 4: Base Year food and Beverage Penetration Rates 2016

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Hitchin	74.6%	17.7%	0.0%	14.5%	0.0%	1.5%	33.2%	0.0%	41.0%	6.5%	0.0%	5.0%
Letchworth Garden City	2.9%	60.2%	0.0%	8.1%	0.0%	1.6%	0.6%	0.0%	10.6%	0.0%	0.0%	5.0%
Royston	0.3%	0.3%	0.0%	0.0%	0.0%	33.8%	0.0%	0.0%	0.5%	0.0%	0.0%	5.0%
Baldock	1.4%	2.4%	0.0%	46.9%	0.0%	0.3%	0.0%	0.0%	1.7%	0.0%	0.0%	5.0%
Other North Hertfordshire	0.9%	2.7%	0.0%	11.1%	0.0%	1.2%	11.4%	0.0%	0.5%	0.5%	0.0%	1.0%
North Letchworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Baldock UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage/Knebworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
District Area Total	**80.1%**	**83.3%**	**0.0%**	**80.6%**	**0.0%**	**38.4%**	**45.2%**	**0.0%**	**54.3%**	**7.0%**	**0.0%**	**n/a**
Stevenage	4.8%	3.7%	0.0%	2.3%	0.0%	5.3%	19.1%	0.0%	2.4%	1.3%	0.0%	n/a
Cambridge	0.4%	0.6%	0.0%	7.5%	0.0%	30.3%	1.6%	0.0%	1.0%	0.0%	0.0%	n/a
Luton	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.1%	0.0%	n/a
Welwyn Garden City	0.9%	2.2%	0.0%	0.6%	0.0%	0.0%	19.8%	0.0%	0.6%	4.0%	0.0%	n/a
Other	13.8%	9.4%	0.0%	9.0%	0.0%	26.0%	14.3%	0.0%	41.7%	74.6%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***0.0%***	***100.0%***	***0.0%***	***100.0%***	***100.0%***	***0.0%***	***100.0%***	***100.0%***	***0.0%***	**n/a**

Table 5: Base Year Fodd and Beverage Expenditure 2016 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2016	**£42.29**	**£40.21**	**£0.00**	**£16.21**	**£0.00**	**£59.60**	**£34.03**	**£0.00**	**£54.01**	**£53.56**	**£0.00**	**n/a**	**£299.91**
Hitchin	£31.55	£7.12	£0.00	£2.35	£0.00	£0.89	£11.30	£0.00	£22.14	£3.48	£0.00	£4.15	£82.98
Letchworth Garden City	£1.23	£24.21	£0.00	£1.31	£0.00	£0.95	£0.20	£0.00	£5.73	£0.00	£0.00	£1.77	£35.40
Royston	£0.13	£0.12	£0.00	£0.00	£0.00	£20.15	£0.00	£0.00	£0.27	£0.00	£0.00	£1.09	£21.75
Baldock	£0.59	£0.97	£0.00	£7.60	£0.00	£0.18	£0.00	£0.00	£0.92	£0.00	£0.00	£0.54	£10.80
Other North Hertfordshire	£0.38	£1.09	£0.00	£1.80	£0.00	£0.72	£3.88	£0.00	£0.27	£0.27	£0.00	£0.08	£8.48
North Letchworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Baldock UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
District Area Total	**£33.87**	**£33.50**	**£0.00**	**£13.07**	**£0.00**	**£22.89**	**£15.38**	**£0.00**	**£29.33**	**£3.75**	**£0.00**	**£7.63**	**£159.41**
Stevenage	£2.03	£1.49	£0.00	£0.37	£0.00	£3.16	£6.50	£0.00	£1.30	£0.70	£0.00	n/a	£15.54
Cambridge	£0.17	£0.24	£0.00	£1.22	£0.00	£18.06	£0.54	£0.00	£0.54	£0.00	£0.00	n/a	£20.77
Luton	£0.00	£0.32	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.02	£0.00	n/a	£7.34
Welwyn Garden City	£0.38	£0.88	£0.00	£0.10	£0.00	£0.00	£6.74	£0.00	£0.32	£2.14	£0.00	n/a	£10.57
Other	£5.84	£3.78	£0.00	£1.46	£0.00	£15.50	£4.87	£0.00	£22.52	£39.95	£0.00	n/a	£93.91
Total Expenditure	**£42.29**	**£40.21**	**£0.00**	**£16.21**	**£0.00**	**£59.60**	**£34.03**	**£0.00**	**£54.01**	**£53.56**	**£0.00**	**n/a**	**£307.54**

Source: *Table 3 and Table 4*

Table 6: Future Food and Beverage Penetration Rates 2021-2031

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stott'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow
Hitchin	74.6%	17.7%	10.0%	14.5%	10.0%	1.5%	33.2%	0.0%	41.0%	6.5%	0.0%	5.0%
Letchworth Garden City	2.9%	59.2%	55.0%	8.1%	5.0%	1.6%	0.6%	0.0%	10.6%	0.0%	0.0%	5.0%
Royston	0.3%	0.3%	0.0%	0.0%	0.0%	33.8%	0.0%	0.0%	0.5%	0.0%	0.0%	5.0%
Baldock	1.4%	2.4%	0.0%	44.9%	40.0%	0.3%	0.0%	0.0%	1.7%	0.0%	0.0%	5.0%
Other North Hertfordshire	0.9%	2.7%	0.0%	11.1%	5.0%	1.2%	11.4%	0.0%	0.5%	0.5%	0.0%	1.0%
North Letchworth UE	0.0%	1.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Baldock UE	0.0%	0.0%	0.0%	2.0%	20.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Stevenage/Knebworth UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	0.0%	0.0%	0.0%	1.0%
Luton UE	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	20.0%	1.0%
District Area Total	**80.1%**	**83.3%**	**85.0%**	**80.6%**	**80.0%**	**38.4%**	**45.2%**	**20.0%**	**54.3%**	**7.0%**	**20.0%**	**n/a**
Stevenage	4.8%	3.7%	3.0%	2.3%	0.0%	5.3%	19.1%	80.0%	2.4%	1.3%	80.0%	n/a
Cambridge	0.4%	0.6%	0.0%	7.5%	10.0%	30.3%	1.6%	0.0%	1.0%	0.0%	0.0%	n/a
Luton	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	13.1%	0.0%	n/a
Welwyn Garden City	0.9%	2.2%	2.0%	0.6%	0.0%	0.0%	19.8%	0.0%	0.6%	4.0%	0.0%	n/a
Other	13.8%	9.4%	10.0%	9.0%	10.0%	26.0%	14.3%	0.0%	41.7%	74.6%	0.0%	n/a
Market Share Total	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	***100.0%***	**n/a**

Source: *Market shares based on NEMS 2016 household survey results and NLP estimates for urban extensions*

Table 7: Future Food and Beverage Expenditure 2021 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2021	**£45.92**	**£44.09**	**£0.78**	**£17.70**	**£1.28**	**£68.09**	**£36.74**	**£1.08**	**£61.65**	**£60.64**	**£0.41**	**n/a**	**£338.38**
Hitchin	£34.26	£7.80	£0.08	£2.57	£0.13	£1.02	£12.20	£0.00	£25.27	£3.94	£0.00	£4.59	£91.87
Letchworth Garden City	£1.33	£26.10	£0.43	£1.43	£0.06	£1.09	£0.22	£0.00	£6.53	£0.00	£0.00	£1.96	£39.16
Royston	£0.14	£0.13	£0.00	£0.00	£0.00	£23.02	£0.00	£0.00	£0.31	£0.00	£0.00	£1.24	£24.84
Baldock	£0.64	£1.06	£0.00	£7.95	£0.51	£0.20	£0.00	£0.00	£1.05	£0.00	£0.00	£0.60	£12.01
Other North Hertfordshire	£0.41	£1.19	£0.00	£1.96	£0.06	£0.82	£4.19	£0.00	£0.31	£0.30	£0.00	£0.09	£9.34
North Letchworth UE	£0.00	£0.44	£0.16	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.60
Baldock UE	£0.00	£0.00	£0.00	£0.35	£0.26	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.62
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.22	£0.00	£0.00	£0.00	£0.00	£0.22
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.08	£0.00	£0.08
District Area Total	**£36.79**	**£36.73**	**£0.66**	**£14.27**	**£1.02**	**£26.15**	**£16.61**	**£0.22**	**£33.47**	**£4.24**	**£0.08**	**£8.50**	**£178.74**
Stevenage	£2.20	£1.63	£0.02	£0.41	£0.00	£3.61	£7.02	£0.86	£1.48	£0.79	£0.33	n/a	£18.35
Cambridge	£0.18	£0.26	£0.00	£1.33	£0.13	£20.63	£0.59	£0.00	£0.62	£0.00	£0.00	n/a	£23.74
Luton	£0.00	£0.35	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£7.94	£0.00	n/a	£8.30
Welwyn Garden City	£0.41	£0.97	£0.02	£0.11	£0.00	£0.00	£7.28	£0.00	£0.37	£2.43	£0.00	n/a	£11.58
Other	£6.34	£4.14	£0.08	£1.59	£0.13	£17.70	£5.25	£0.00	£25.71	£45.23	£0.00	n/a	£106.18
Total Expenditure	**£45.92**	**£44.09**	**£0.78**	**£17.70**	**£1.28**	**£68.09**	**£36.74**	**£1.08**	**£61.65**	**£60.64**	**£0.41**	**n/a**	**£346.88**

Source: *Table 3 and Table 6*

Table 8: Future Food and Beverage Expenditure 2026 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2026	**£49.81**	**£47.49**	**£1.81**	**£19.12**	**£5.17**	**£76.30**	**£40.07**	**£4.97**	**£69.64**	**£68.00**	**£3.41**	**n/a**	**£385.79**
Hitchin	£37.16	£8.41	£0.18	£2.77	£0.52	£1.14	£13.30	£0.00	£28.55	£4.42	£0.00	£5.08	£101.53
Letchworth Garden City	£1.44	£28.11	£0.99	£1.55	£0.26	£1.22	£0.24	£0.00	£7.38	£0.00	£0.00	£2.17	£43.37
Royston	£0.15	£0.14	£0.00	£0.00	£0.00	£25.79	£0.00	£0.00	£0.35	£0.00	£0.00	£1.39	£27.82
Baldock	£0.70	£1.14	£0.00	£8.59	£2.07	£0.23	£0.00	£0.00	£1.18	£0.00	£0.00	£0.73	£14.64
Other North Hertfordshire	£0.45	£1.28	£0.00	£2.12	£0.26	£0.92	£4.57	£0.00	£0.35	£0.34	£0.00	£0.10	£10.39
North Letchworth UE	£0.00	£0.47	£0.36	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£0.84
Baldock UE	£0.00	£0.00	£0.00	£0.38	£1.03	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£1.43
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.99	£0.00	£0.00	£0.00	£0.01	£1.00
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.68	£0.01	£0.69
District Area Total	**£39.90**	**£39.56**	**£1.53**	**£15.41**	**£4.14**	**£29.30**	**£18.11**	**£0.99**	**£37.81**	**£4.76**	**£0.68**	**£9.51**	**£201.71**
Stevenage	£2.39	£1.76	£0.05	£0.44	£0.00	£4.04	£7.65	£3.98	£1.67	£0.88	£2.73	n/a	£25.60
Cambridge	£0.20	£0.28	£0.00	£1.43	£0.52	£23.12	£0.64	£0.00	£0.70	£0.00	£0.00	n/a	£26.89
Luton	£0.00	£0.38	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£8.91	£0.00	n/a	£9.29
Welwyn Garden City	£0.45	£1.04	£0.04	£0.11	£0.00	£0.00	£7.93	£0.00	£0.42	£2.72	£0.00	n/a	£12.72
Other	£6.87	£4.46	£0.18	£1.72	£0.52	£19.84	£5.73	£0.00	£29.04	£50.73	£0.00	n/a	£119.09
Total Expenditure	**£49.81**	**£47.49**	**£1.81**	**£19.12**	**£5.17**	**£76.30**	**£40.07**	**£4.97**	**£69.64**	**£68.00**	**£3.41**	**n/a**	**£395.30**

Source: *Table 3 and Table 6*

Table 9: Future Food and Beverage Expenditure 2031 £ Million (2014 Prices)

Centre/Facilities	Zone 1 Hitchin	Zone 2 Letchworth	Zone 2A Letchw'th UE	Zone 3 Baldock	Zone 3A Baldock UE	Zone 4 Royston	Zone 5 South (Rural)	Zone 5A Urban Ext.	Zone 6 Sheff/Stotf'd	Zone 7 East of Luton	Zone 7A Urban Ext.	% Inflow	Total Expend
Expenditure 2031	**£54.08**	**£51.15**	**£2.98**	**£20.65**	**£9.14**	**£84.67**	**£43.46**	**£8.41**	**£77.96**	**£75.68**	**£7.04**	**n/a**	**£435.22**
Hitchin	£40.35	£9.05	£0.30	£2.99	£0.91	£1.27	£14.43	£0.00	£31.96	£4.92	£0.00	£5.59	£111.78
Letchworth Garden City	£1.57	£30.28	£1.64	£1.67	£0.46	£1.35	£0.26	£0.00	£8.26	£0.00	£0.00	£2.39	£47.89
Royston	£0.16	£0.15	£0.00	£0.00	£0.00	£28.62	£0.00	£0.00	£0.39	£0.00	£0.00	£1.54	£30.87
Baldock	£0.76	£1.23	£0.00	£9.27	£3.65	£0.25	£0.00	£0.00	£1.33	£0.00	£0.00	£0.87	£17.36
Other North Hertfordshire	£0.49	£1.38	£0.00	£2.29	£0.46	£1.02	£4.95	£0.00	£0.39	£0.38	£0.00	£0.11	£11.47
North Letchworth UE	£0.00	£0.51	£0.60	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.01	£1.12
Baldock UE	£0.00	£0.00	£0.00	£0.41	£1.83	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.02	£2.26
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.68	£0.00	£0.00	£0.00	£0.02	£1.70
Luton UE	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.41	£0.01	£1.42
District Area Total	**£43.32**	**£42.61**	**£2.53**	**£16.64**	**£7.31**	**£32.51**	**£19.65**	**£1.68**	**£42.33**	**£5.30**	**£1.41**	**£10.57**	**£225.86**
Stevenage	£2.60	£1.89	£0.09	£0.47	£0.00	£4.49	£8.30	£6.73	£1.87	£0.98	£5.64	n/a	£33.06
Cambridge	£0.22	£0.31	£0.00	£1.55	£0.91	£25.66	£0.70	£0.00	£0.78	£0.00	£0.00	n/a	£30.12
Luton	£0.00	£0.41	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£9.91	£0.00	n/a	£10.32
Welwyn Garden City	£0.49	£1.13	£0.06	£0.12	£0.00	£0.00	£8.61	£0.00	£0.47	£3.03	£0.00	n/a	£13.90
Other	£7.46	£4.81	£0.30	£1.86	£0.91	£22.01	£6.22	£0.00	£32.51	£56.46	£0.00	n/a	£132.54
Total Expenditure	**£54.08**	**£51.15**	**£2.98**	**£20.65**	**£9.14**	**£84.67**	**£43.46**	**£8.41**	**£77.96**	**£75.68**	**£7.04**	**n/a**	**£445.80**

Source: *Table 3 and Table 6*

Table 10 - Food and Beverage Units/Floorspace

Town	Number Units Class A3	Number Units Class A4	Number Units Class A5	Total Class A3- A5	Total Floorspace Sq M
Hitchin	47	22	27	96	17,157
Letchworth Garden City	18	3	14	35	5,947
Royston	15	7	10	32	6,941
Baldock	13	9	5	27	6,460
	93	**41**	**56**	**190**	**36,505**

Sources: North Hertfordshire Floorspace Survey April 2015

Table 11: Food and Beverage Surplus Expenditure 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Available Expenditure				
Hitchin	£82.98	£91.87	£101.53	£111.78
Letchworth Garden City	£35.40	£39.16	£43.37	£47.89
Royston	£21.75	£24.84	£27.82	£30.87
Baldock	£10.80	£12.01	£14.64	£17.36
Other North Hertfordshire	£8.48	£9.34	£10.39	£11.47
North Letchworth UE	£0.00	£0.60	£0.84	£1.12
Baldock UE	£0.00	£0.62	£1.43	£2.26
Stevenage/Knebworth UE	£0.00	£0.22	£1.00	£1.70
Luton UE	£0.00	£0.08	£0.69	£1.42
North Hertfordshire Total	**£159.41**	**£178.74**	**£201.71**	**£225.86**
Benchmark Turnover Existing				
Hitchin	£82.98	£87.21	£91.66	£96.34
Letchworth Garden City	£35.40	£37.21	£39.10	£41.10
Royston	£21.75	£22.86	£24.03	£25.25
Baldock	£10.80	£11.35	£11.93	£12.53
Other North Hertfordshire	£8.48	£8.92	£9.37	£9.85
North Letchworth UE	£0.00	£0.00	£0.00	£0.00
Baldock UE	£0.00	£0.00	£0.00	£0.00
Stevenage/Knebworth UE	£0.00	£0.00	£0.00	£0.00
Luton UE	£0.00	£0.00	£0.00	£0.00
North Hertfordshire Total	**£159.41**	**£167.54**	**£176.09**	**£185.07**
Expenditure Deficit/Surplus				
Hitchin	n/a	£4.65	£9.87	£15.44
Letchworth Garden City	n/a	£1.95	£4.27	£6.79
Royston	n/a	£1.98	£3.79	£5.62
Baldock	n/a	£0.67	£2.71	£4.82
Other North Hertfordshire	n/a	£0.43	£1.02	£1.62
North Letchworth UE	n/a	£0.60	£0.84	£1.12
Baldock UE	n/a	£0.62	£1.43	£2.26
Stevenage/Knebworth UE	n/a	£0.22	£1.00	£1.70
Luton UE	n/a	£0.08	£0.69	£1.42
North Hertfordshire Total	**n/a**	**£11.20**	**£25.62**	**£40.79**

Source: Tables 1 and 5 to 9

Table 12: Food and Beverage Floorspace Projections 2016 to 2031 (£ Millions)

Centre	2016	2021	2026	2031
Expenditure Deficit/Surplus				
Hitchin	n/a	£4.65	£9.87	£15.44
Letchworth Garden City	n/a	£1.95	£4.27	£6.79
Royston	n/a	£1.98	£3.79	£5.62
Baldock	n/a	£0.67	£2.71	£4.82
Other North Hertfordshire	n/a	£0.43	£1.02	£1.62
North Letchworth UE	n/a	£0.60	£0.84	£1.12
Baldock UE	n/a	£0.62	£1.43	£2.26
Stevenage/Knebworth UE	n/a	£0.22	£1.00	£1.70
Luton UE	n/a	£0.08	£0.69	£1.42
North Hertfordshire Total	**n/a**	**£11.20**	**£25.62**	**£40.79**
Turnover Density of New Floorspace £ per sq m	£5,000	£5,255	£5,523	£5,805
New Floorspace Sq M Gross				
Hitchin	n/a	885	1,787	2,659
Letchworth Garden City	n/a	372	772	1,170
Royston	n/a	376	687	968
Baldock	n/a	127	491	831
Other North Hertfordshire	n/a	81	184	279
North Letchworth UE	n/a	115	153	193
Baldock UE	n/a	117	259	390
Stevenage/Knebworth UE	n/a	41	182	293
Luton UE	n/a	16	125	245
North Hertfordshire Total	**n/a**	**2,131**	**4,640**	**7,027**

Appendix 5 Town Centre Health Checks

A. Hitchin Town Centre

Hitchin is the main shopping and commercial centre in North Hertfordshire. The centre serves shoppers from across the District with a large number of retail and service uses. Hitchin is the western most centre within North Hertfordshire. Letchworth Garden City, Baldock and Royston are all located to the north east of Hitchin.

Hitchin's key roles include:

- convenience shopping – including specialist bakers, butchers, newsagents and frozen food shops. There are two large food stores over 2,000 sq. m net - Sainsbury's and Waitrose and a medium sized Asda (less than 1,000 sq.m net). There is also a small Mark & Spencer Simply Food store and Morrison's Local. These facilities serve main food and grocery shopping trips and basket/top-up food shopping trips;
- comparison shopping - a good range of multiple and independent shops selling a range of high and lower order comparison goods. There is a good selection of multiples, mainly located around Market Place and on the High Street.
- services – including a range of high street national banks, cafés, restaurants, takeaways, travel agents, hairdressers/beauty parlours and estate agents;
- entertainment – including pubs and bars; and
- community facilities –several government offices, advice centres, health centres, leisure centres and employment agencies.

The in-street survey in Hitchin provides an indication of the varied role of the town centre. The results indicated that shopping was the main activity (over 48% of respondent main purpose for visiting). This was the second highest figure in the District, behind Letchworth Garden City (over 54%).

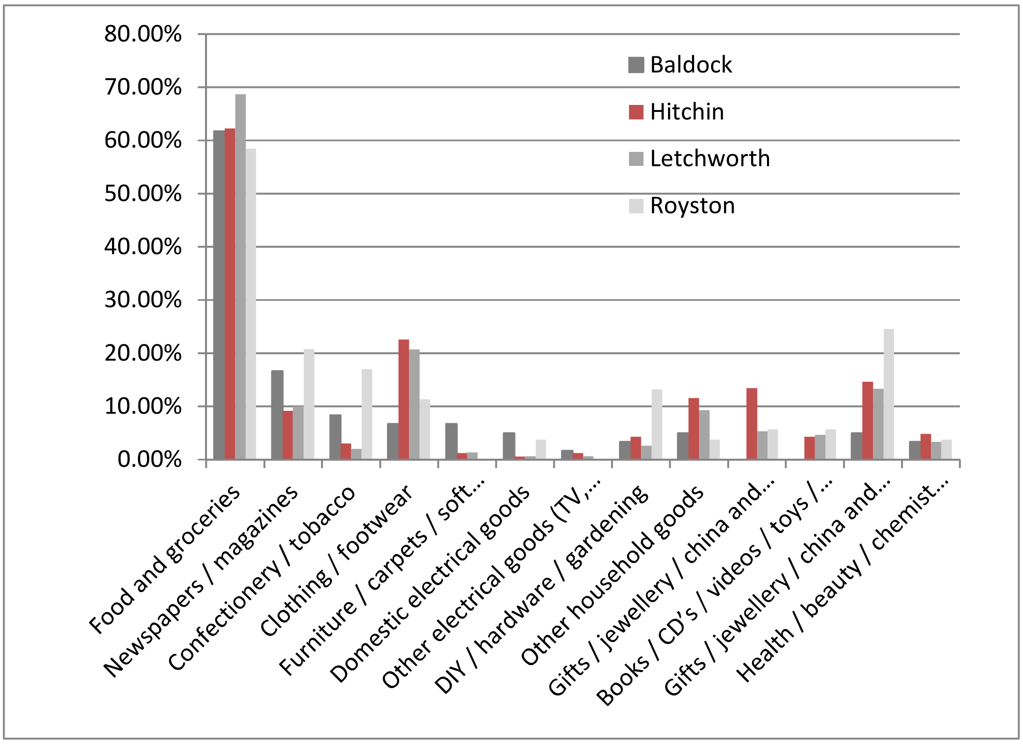
The average expenditure per shopper on comparison goods was £22.50, which is the highest figure in the District, compared with £18.13 in Letchworth Garden City. The average spend per shopper on convenience goods was £17.16, compared with the District average of £18.83.

The average expenditure on eating and drinking out was £6.20, which is the highest in the District, and much higher than the average (£3.96).

The types of products purchased by visitors are shown in the graph below. The pattern of spending is similar to other centres in the District, but Hitchin has high proportions of customers buying higher order comparison goods, such as clothing/footwear and gifts/jewellery/china/glass.

Over 46% of visitors interviewed in Hitchin town centre intended to visit leisure, entertainment or places to eat and drink, which was the highest in the District (average 35.6%).

Figure A.0.1 Types of Goods Purchased in Each Centre (% of Visitors)



Source: NEMS In-Street Survey 2016

The average length of stay in the shopping area in Hitchin was 101 minutes compared with the 90 minutes average for all four centres, only Royston was higher at 102 minutes. The average frequency of trips to Hitchin was 2.33 trips per week, slightly above the average (2.27 trips per week).

Mix of Uses and Retailer Occupation

Hitchin has a total of 359 retail/service units. The diversity of uses present in Hitchin in terms of the number of ground floor units is set out in Table A.1 as at April 2015, compared against the national average.

Table A1 Hitchin Centre Use Class A Mix by Unit

Type of Unit	Units 2009	Units 2015	% of Units 2015	
			Hitchin%	UK Average (1)
A1 Comparison Retail	157	153	42.6	35.8
A1 Convenience Retail	25	27	7.5	8.4
A1 Services (1)	44	51	14.2	12.3
A2 Services (2)	33	36	10.0	12.3
A3 Restaurants/Cafés	34	43	12.0	9.0
A4 Pubs/bar	18	18	5.0	4.5
A5 Takeaways	11	11	3.1	5.9
Vacant	36	20	5.6	11.8
Total	**358**	**359**	**100.0**	**100.0**

Source: North Herts Land Use Surveys April 2015.
(1) UK average for all town centres surveyed by Goad Plans (2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

The centre has a broadly similar mix of uses compared with the national average. The proportions of comparison shops, A1 services and A3 restaurants are higher than the national averages, whilst the proportions of non-retail services (A2 and A5) are slightly below the national average. The proportion of vacant units is significantly below the national average.

Between 2009 and 2015 the number of comparison shops reduced by 4, despite the reduction (-16) in vacant units. Vacant units in Hitchin at 2009 appear to have been re-occupied predominantly by Class A3 uses and nonretail A1 services, which suggests Hitchin has diversified its evening economy since 2009.

Table A1 Hitchin Centre Use Class A Mix by Unit

Type of Unit	Units 2009	Units 2015	% of Units 2015	
			Hitchin%	UK Average (1)
A1 Comparison Retail	157	153	42.6	35.8
A1 Convenience Retail	25	27	7.5	8.4
A1 Services (1)	44	51	14.2	12.3
A2 Services (2)	33	36	10.0	12.3
A3 Restaurants/Cafés	34	43	12.0	9.0
A4 Pubs/bar	18	18	5.0	4.5
A5 Takeaways	11	11	3.1	5.9
Vacant	36	20	5.6	11.8
Total	**358**	**359**	**100.0**	**100.0**

Source: North Herts Land Use Surveys April 2015.
(1) UK average for all town centres surveyed by Goad Plans (2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

Despite the small reduction in comparison outlets, Hitchin still has a reasonable selection of comparison shops (153 units) reflecting the centre's role as the main shopping and commercial centre in North Hertfordshire. Table A2 provides a breakdown of comparison shop uses by goods categories.

Table A2 Hitchin Town Centre Breakdown of Comparison Units

Type of Unit	Hitchin			2015 % UK Average*
	Units 2009	Units 2015	% 2015	
Clothing and footwear	40	47	30.7	25.0
Furniture, carpets and textiles	20	12	7.8	7.4
Booksellers, arts, crafts and stationers	12	10	6.5	10.6
Electrical, gas, music and photography	18	13	8.5	9.4
DIY, hardware and homewares	8	7	4.6	6.4
China, glass, gifts and fancy goods	7	14	9.1	4.6
Cars, motorcycles and motor access	3	1	0.6	1.3
Chemists, drug stores and opticians	10	14	9.1	10.0
Variety, department and catalogue	2	2	1.3	1.6
Florists, nurserymen and seedsmen	3	2	1.3	2.3
Toys, hobby, cycle and sport	6	3	2.0	5.2
Jewellers	6	10	6.5	5.0
Charity, second-hand shops	)	12	7.8	8.4
Other comparison retailers	) 20	6	3.9	2.9
Total	**157**	**153**	**100.0**	**100.0**

Source: North Herts Land Use Surveys *UK average for centres surveyed by Goad Plans (June 2015)

All categories of comparison goods trade are represented in Hitchin, and there is a reasonable choice of outlets in most categories. Hitchin has a particularly good provision of 'clothing and footwear', 'china, glass, gifts and fancy goods' and 'jewellers'. The range of comparison retailers is broadly similar in comparison to the 2009 survey. Overall, these results indicate that the centre provides a good range and choice of comparison goods.

There is a good representation of major national multiple comparison retailers, these include:

- Argos
- Bath Store
- Boots the Chemist
- Card Factory
- Carpetright
- Carphone Warehouse
- Claire's
- Clinton Cards
- Dorothy Perkins
- EE
- Fat Face
- Halfords
- Jo Jo
- Lloyds Chemist
- M&Co
- Magnet
- Milletts
- Monsoon
- New Look
- Next
- O2
- Phase 8
- Poundland
- Scope
- Shoe Zone
- Specsavers
- Superdrug
- The Clarks Shop
- Vision Express
- Vodafone
- WH Smith
- Waterstones
- White Stuff
- Wilkinsons

National multiple retailers in Hitchin are concentrated around the central High Street/Bancroft area. The Marks & Spencer Simply Food and Morrison's Local are centrally located on Bancroft, but the Sainsbury, Asda and Waitrose stores occupy more peripheral locations. Independents can be found throughout the shopping centre however they are primarily located within the more peripheral areas including Bridge Street, Bucklesbury, Churchgate, Sun Street and Hermitage Road.

Hitchin has two large food stores (over 2,000 sq.m net). The Sainsbury's and Waitrose stores offer a reasonable range of goods suitable for bulk food shopping. These large food stores are supported by a number of small convenience stores i.e. Asda, Iceland and Marks and Spencer Simply Food stores that are suitable for basket and top-up food shopping. The centre has a good selection of small, predominantly independent, convenience shops and market stalls.

Service Uses

Hitchin Centre has a good range of service uses, with a choice of service providers across all of the categories, as shown in Table A3. Hitchin has a good range of service uses, with a good choice in all categories as shown in Table A3. The proportion of units in each category is broadly similar to the national average. Hitchin has an excellent provision of Class A3 restaurants/cafés and hairdressers/beauty outlets. These sectors have grown significantly since 2009. Hitchin has lower proportions of Class A5 takeaways, betting shops and travel agents.

Table A3 Hitchin Analysis of Selected Service Uses

Type of Unit	Hitchin			% 2015 UK Average*
	Units 2009	Units 2015	%	
Restaurants/cafés	34	43	29.5	22.5
Fast food/takeaways	11	11	7.5	14.8
Pubs/bars	18	18	12.3	11.1
Banks/other financial services	20	18	12.3	11.8
Betting shops/casinos	3	3	2.1	3.8
Estate agents/valuers	10	15	10.3	9.1
Travel agents	3	1	0.7	2.2
Hairdressers/beauty parlours	30	36	24.6	22.7
Laundries/dry cleaners	2	1	0.7	2.1
Sub-Total	**131**	**146**	**100.0**	**100.0**
Other A1 Retail Services	9	13		
Total	**140**	**159**		

Source: Goad 2015 *UK average for all town centres surveyed by Goad Plans (June 2015)

The centre has a reasonable representation of banks and financial services including; HSBC, Lloyds TSB, NatWest, Halifax, Barclays and Santander.

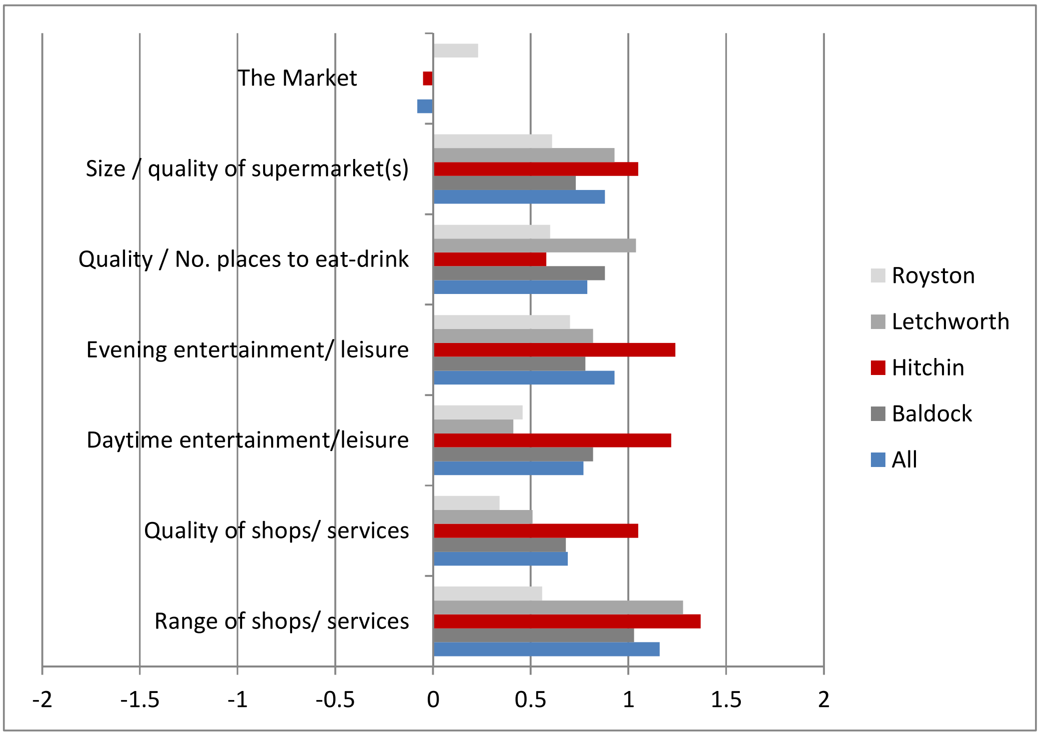
In addition to these Class A service uses Hitchin town centre is represented by other non-retail uses, including several social clubs, health and fitness clubs, therapy centres and a snooker hall. There are also several health centres, dental surgeries and doctor's surgeries.

Customer Views on Shops and Services

Respondents to the in-street survey in Hitchin were asked to rate the town centre from "very poor" (-2) to "very good" (+2) in terms of seven factors relating to shops, services and entertainment/leisure facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = "quite good") for these factors, apart from the markets in Hitchin and Royston, with negative scores.

These results suggest reasonable levels of satisfaction with shops and services, particularly in Hitchin, which outscores most of the other centres.

Figure A.2 How Visitors Rate Centres for Shops, Services and Facilities (% of visitors)



Source: NEMS In-Street Survey 2016

Supply and Quality of Commercial Premises

There are 20 vacant units in Hitchin (1,800 sq.m gross). The vacancy rate is only 5.6%, which is lower than the national average (11.8%). The number of vacant units has declined significantly since the 2009 survey (by 16 units). The vacant units are generally spread throughout the centre. Vacancies generally small retail units (less than 200 sq.m gross) reflecting the increasing preference for modern retailers to occupier larger retail units. There are a limited amount of vacant premises in the main shopping area.

The town centre has a large number of retail properties, but most premises are generally small (less than 200 sq.m). The Churchgate Centre is relatively unattractive and would benefit from refurbishment/redevelopment.

Zone A retail rents vary significantly throughout the centre. The highest Zone A rents are over £900 per sq.m in Bancroft. Elsewhere rents typically range from £200 to £700 per sq.m.

The units within the town centre are in a good or reasonable condition, with mostly well-kept frontages. The majority of the town centre is within a conservation area and the style of buildings and overall appearance of the centre reflects this. The impact of new development will need to be carefully considered to preserve the character and appearance of this heritage asset.

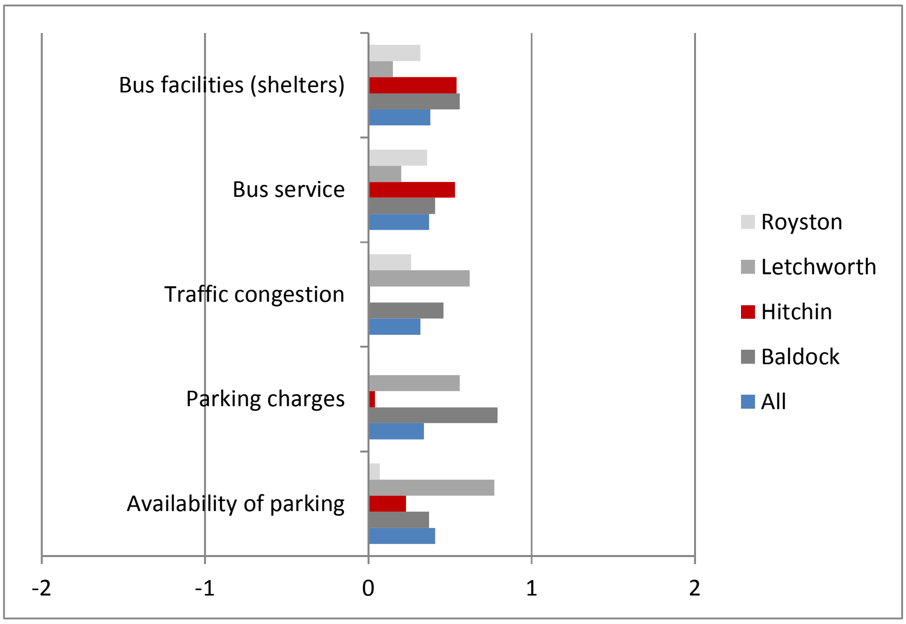
The centre includes good quality street furniture and paving is well maintained, including the cobbled streets at the Market Place and near the church.

Accessibility and Movement

About 12% of visitors interviewed in Hitchin town centre travelled to the centre by public transport (10.4% bus and 1.5% train), compared with the 10.3% average for all four centres in the District.

Respondents to the in-street survey in Hitchin were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of five factors relating to car parking, bus services and the average scores are shown in the graph below. All centres achieve positive scores for these factors, but between 0 and +1 “neither good nor poor” to “quite good”. These results suggest there were mixed opinions on these facts with marginally more satisfied visitors.

Figure A.3 How Visitors Rate Centres on Transport Issues



Source: NEMS In-Street Survey 2016

Views on Hitchin were generally above average for bus services/facilities, but significantly below average for car parking and congestion. There are several large car parks within the town centre including:

- Sainsbury’s car park;
- Waitrose car park and the Large multi-storey;
- Asda car park;
- Biggin Lane;
- Bancroft;
- Christ Church;
- Woodside;
- Market Square;
- Portmill Lane East and West; and
- St Mary’s Square.

These car parks distributed around the town centre and are conveniently located near the main shopping area, but some of the short stay car parks are relatively small and vehicular movement between car parks can be difficult if car parks are full at peak periods, for example on market day.

The centre is well served by bus with bus routes providing access to the centre from surrounding areas within the District, including Letchworth Garden City, Baldock and Royston. Bus routes also serve centres further afield including Bedford, Cambridge Bishop’s Stortford, Cambridge, Coventry, Flitwick, Hatfield, London, Luton, Milton Keynes, Welwyn Garden City, St Albans and Stevenage. Bus routes from Hitchin run to three airports, Luton, Stansted and Heathrow.

The principal bus stops are Hermitage Road and Bancroft, which are conveniently located in relation to the main shopping area. These bus links will help to attract customers to the town centre from Hitchin and surrounding areas. These linkages, particularly to other larger shopping centres, also allow local residents to shop outside Hitchin.

There is a railway station within Hitchin which provides services to London Kings Cross, Stevenage and Welwyn Garden City to the south and to Letchworth Garden City, Royston, Baldock, Cambridge and Peterborough to the east and north east. Some trains stop at the smaller centres between London and Hitchin including Palmers Green, Finsbury Park, Alexandra Palace and Haringey. However, the train station is located around 1 mile to the north east of the town centre and is therefore not conveniently located for visitors to the town centre. The household survey results suggest few customers use the train services for shopping in the town centre. Nevertheless, improved pedestrian links to the train could help to increase the number of shoppers and occasional visitors.

Pedestrian access throughout the centre is generally good. However, given the historic nature of the centre, some streets are narrow which can impede pedestrian movement and get congested (i.e. Sun Street and Bucklersbury).

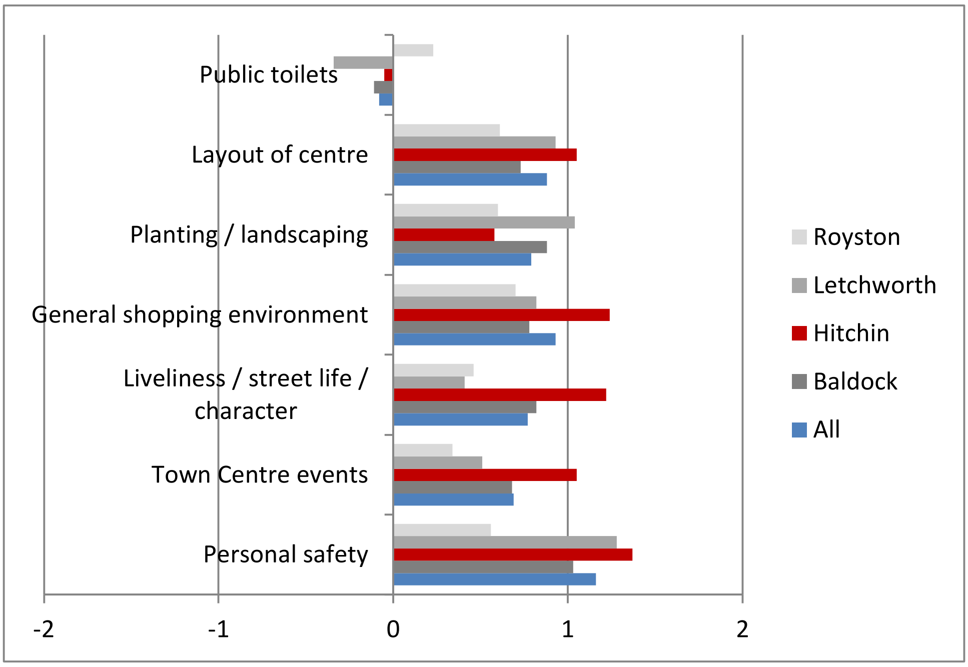
The main shopping area extends from Bancroft, along the High Street to Market Place. This area includes the main national retailers i.e. Next, Monsoon, WH Smith and Marks and Spencer Simply Food.

The shopping area is linear in form and does not provide a natural circuit for pedestrians. Bancroft and High Street from the main spine, and side streets off this spine to a certain extent create dead ends for shoppers, i.e. Brand Street, Bucklersbury, Hermitage Road, Sun Street and Bridge Street. Some of these secondary shopping areas have relatively low pedestrian flows based on our observations.

Environmental Quality

Respondents to the in-street survey in Hitchin were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of seven factors relating to the shopping environment, events and other facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = "quite good") for these factors, apart from public toilets with some negative scores.

Figure A.4 How Visitors Rate Centres on Environmental and Other Factors (% of visitors)



Source: NEMS In-Street Survey 2016

These results suggest reasonable levels of satisfaction, particularly in Hitchin, which outscores most of the other centres.

The quality of the buildings in Hitchin town centre is generally good. Hitchin has an attractive mix of historical buildings and a varied street scene which reflects the centre's historical character. The main shopping area is a pedestrian priority area, including Market Place and the High Street, which provide a focal point within the town centre and enhances pedestrian movement through the town. Conversely, Bancroft, which adjoins the High Street, is a busy road with heavy traffic flows which does detract from the quality of the shopping environment.

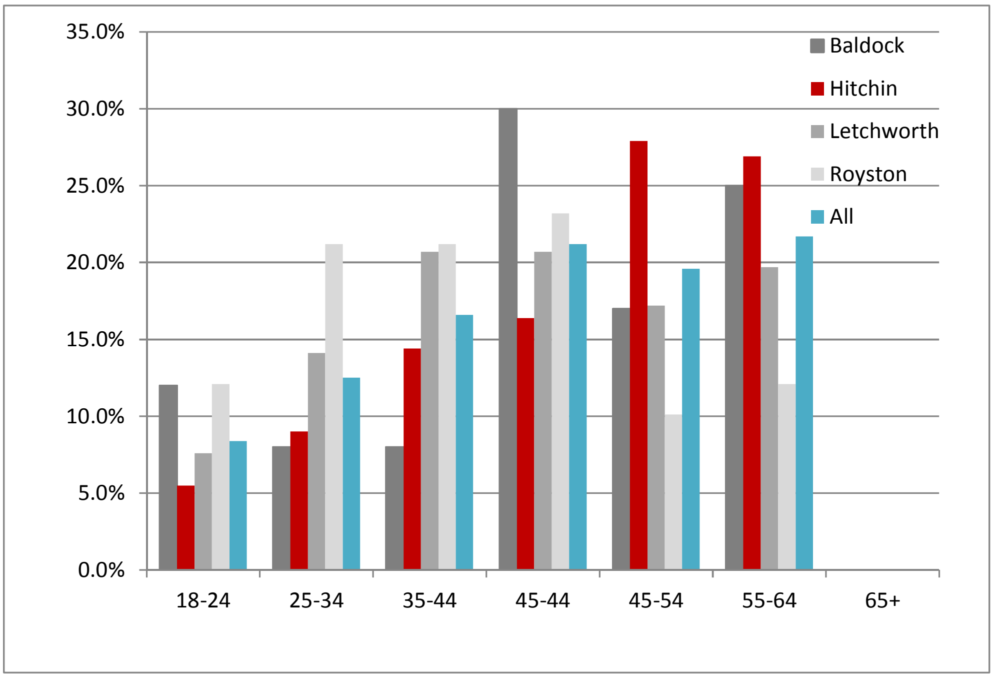
The Churchgate Centre was built in the late 1960's. Individual units in the centre are in reasonable condition, but overall the appearance of the centre, in comparison with the rest of the town centre, is poor. The Churchgate centre is detrimental to the environmental quality of the Market Place. The open market to the rear of the Churchgate Centre is also physically unattractive within the context of its surroundings.

Sun Street, Church Yard and Bucklersbury have attractive period buildings on narrow streets. These areas have an attractive street scene. Sun Street and Bucklersbury are secondary shopping areas with lower levels of pedestrian movements and rental levels. These areas have a concentration of small independent traders and non-retail services.

Visitor Profile

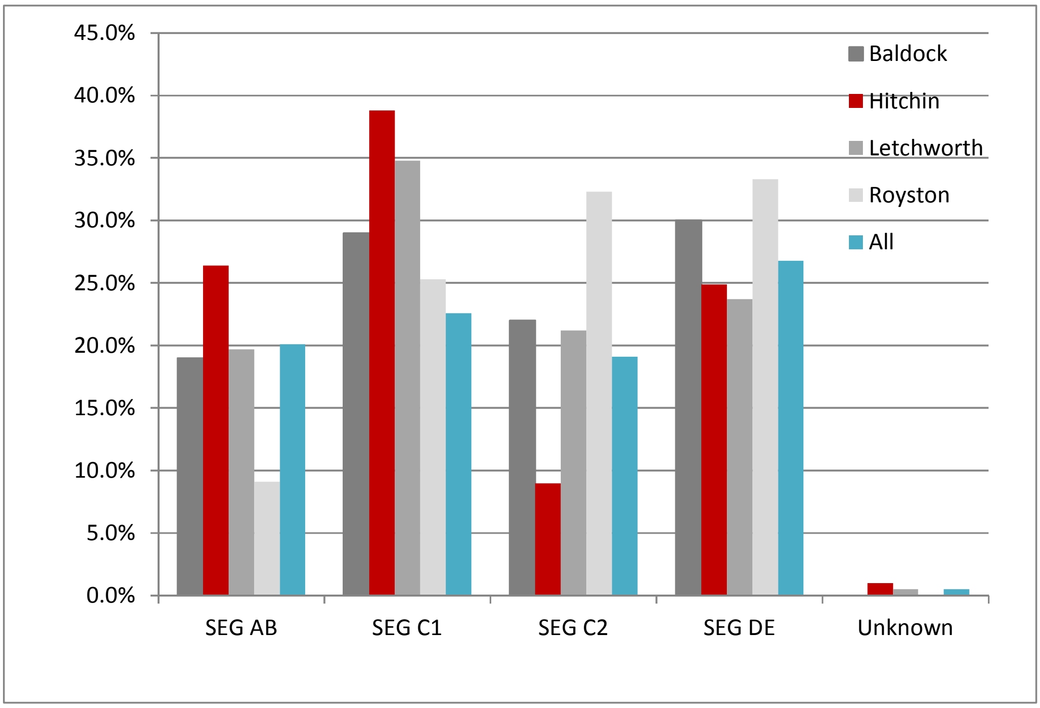
The age and socio economic profile of visitors interviewed during the in-street survey in Hitchin is shown in the graphs below.

Figure A.5 Age Profile of Visitors in Each Centre



Source: NEMS In-Street Survey 2016

Figure A.6 Socio-Economic Profile of Visitors



Source: NEMS In-Street Survey 2016

Hitchin has higher than average proportions of more affluent socio-economic groups (i.e. A – higher management/professionals, B – middle management and C1 – office supervisors/white collar).

Hitchin's Strengths

- Hitchin forms the main shopping centre within the District and provides a good range of convenience and comparison shops. It has a reasonable selection of national multiple retailers.
- Hitchin has a market which is a key asset and encourages visitors to the centre, although the visitor survey suggests the market can be improved.
- The environmental quality of the centre is good, reflecting its historic character and the centre's attractive mix of period buildings and a varied street scene. The street scene around Market Place is especially good.
- The town centre provides a range of service facilities including banks and building societies, restaurants and bars. The evening economy is relatively strong compared with other centres, i.e. Letchworth and Royston.
- The vacancy rate is much lower than the national average which suggests demand for premises is relatively good.
- Most areas of the centre are well maintained and adequate street furniture is provided.
- The centre has a good range of small specialist independent retailers, especially along the secondary shopping areas.
- The centre is easily accessible by a range of modes of transport other than the private car. Movement around the centre on foot is unproblematic with wide pavements and some pedestrian priority areas.
- The centre has good public transport, with many bus routes serving the centre.
- Buildings within the centre are generally in a reasonable to good condition.

Hitchin's Weaknesses

- The choice of retailers is not comparable with some centres, which leads to expenditure leakage to larger centres with a better range of facilities, such as Cambridge, Stevenage and Welwyn Garden City.
- The linear form of the centre does not provide a natural circuit for shoppers, and pedestrian flows within peripheral areas are low, i.e. Bridge Street and the top end of Bancroft.
- Some non-pedestrianised streets have narrow pavements and tend to get congested such as Sun Street and Bucklersbury.
- The Churchgate Shopping Centre and market area detract from the overall attractiveness of the centre.

- The historic character of the town centre and conservation area constrain potential redevelopment opportunities.
- The train station is some distance from the town centre, despite good bus links.

Hitchin's Opportunities

- Hitchin has a reasonably large and affluent catchment population. A high proportion of the expenditure generated by this catchment population leaks from the area. Population and expenditure is expected to grow in the future. If Hitchin can improve or just maintain its current share of expenditure there is potential to improve and expand retail, leisure and service uses.
- There are a number of opportunity sites within the town centre, which could accommodate new retail/leisure uses. This would help to retain more expenditure and customers in the area and possibly generate more trade for existing occupiers in Hitchin town centre.
- Improved linkages along the River Hiz could provide better access and natural circuit for pedestrians between Bridge Street, the Churchgate Centre, the Portmill Lane car parks and Hermitage Road.

Hitchin's Threats

- Other competing shopping centres are likely to continue to improve their environment and retail offer, therefore the competitive gap may widen and the amount of expenditure leakage from the Hitchin area could increase. If Hitchin does not improve its range and choice of facilities the town's role in the hierarchy could decline.

B. Letchworth Garden City Town Centre

Letchworth Garden City was the first Garden City built in 1903 and the town contains many of its original buildings and street form, with low and medium density housing, industry and open spaces. The centre is the second largest in the District in term of retail floorspace and the number of shop units, behind Hitchin and is centrally located within North Hertfordshire. It is located to the east of Hitchin. The centre primarily serves the day-to-day shopping and service needs of local residents.

Letchworth Garden City's key roles include:

- convenience shopping – there is a limited range of convenience traders within Letchworth town centre, but there are Sainsbury's and Lidl stores out of centre. National multiples present include a large Morrison's food store, Sainsbury's Local and an Iceland, and some specialist food shops. These facilities serve both bulk and top-up food shopping trips;
- lower order comparison shopping – there is a range of comparison shops and a small selection of multiples including Argos, New Look, Dorothy Perkins, and Wilkinson mainly located in the Garden Square Shopping Centre and on Eastcheap,
- services - including a range of high street banks, a small number of cafés, restaurants, sandwich bars, takeaways, hairdressers and estate agents;
- entertainment space –includes several pubs and a cinema; and
- community facilities –including the library.

The in-street survey in Letchworth Garden City provides an indication of the varied role of the town centre. The results indicated that that shopping was the main activity (over 54% of respondent main purpose for visiting). This was the highest figure in the District, ahead of Hitchin (over 48%).

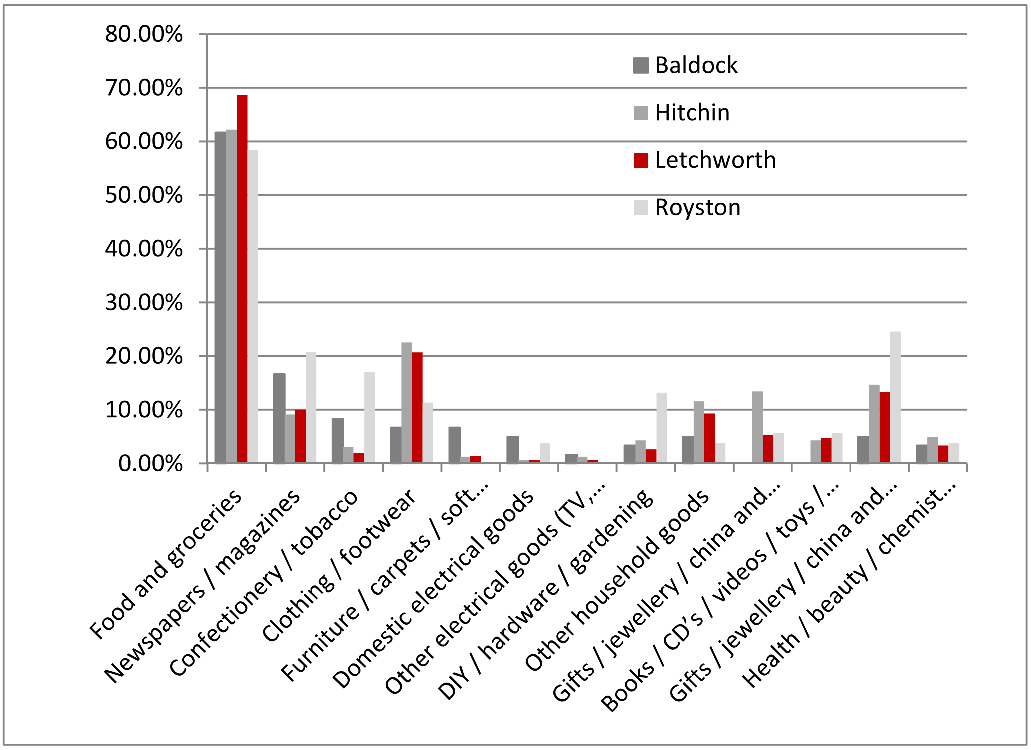
The average spend per shopper on comparison goods was £18.13, which is the second highest figure in the District, behind Hitchin (£22.50). The average spend per shopper on convenience goods was £21.29, compared with the District average of £18.83.

The average spend on eating and drinking out was £2.08, which is the lowest in the District, and much lower than the average (£3.96).

The types of products purchased by visitors are shown in the graph below. The pattern of spending is similar to other centres in the District. Letchworth has a higher proportion of customers buying food and grocery goods.

About 30% of visitors interviewed in Letchworth Garden City town centre intended to visit leisure, entertainment or places to eat and drink, which was the slightly below the District average (35.6%). The average length of stay in the shopping area in Letchworth Garden City was 82 minutes compared with the 90 minutes average for all four centres, only Baldock was lower at 70 minutes. The average frequency of trips to Letchworth was 2.35 trips per week, which was the highest figure for the four centres

Figure B1 Types of Goods Purchased in Each Centre (% of Visitors)



Source: NEMS In-Street Survey 2016

Mix of Uses and Occupier Representation

Letchworth Garden City has a total of 251 retail/service units. The diversity of uses present in terms of the number of ground floor units is set out in Table B.1 as at April 2015, compared against the national average.

Table B1 Letchworth Garden City Centre Use Class A Mix by Unit

Type of Unit	Units 2009	Units 2015	% of Units 2015	
			Letchworth%	UK Average (1)
A1 Comparison Retail	90	88	35.1	35.8
A1 Convenience Retail	19	20	8.0	8.4
A1 Services (1)	37	42	16.7	12.3
A2 Services (2)	28	23	9.2	12.3
A3 Restaurants/Cafés	18	18	7.2	9.0
A4 Pubs/bar	4	3	1.2	4.5
A5 Takeaways	12	10	4.0	5.9
Vacant	46	47	18.7	11.8
Total	**254**	**251**	**100.0**	**100.0**

Source: North Herts Land Use Surveys April 2015.
(1) UK average for all town centres surveyed by Goad Plans (2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

The centre has a very similar mix of uses compared with the national average. The centre has a high proportion of Class A1 services. The proportion of vacant units is significantly higher than the national average. The mix of uses has not changed significantly since 2009.

Letchworth Garden City has a reasonable selection of comparison shops (88 units) reflecting the centre's role as a town centre retail destination within North Hertfordshire. Table B2 provides a breakdown of comparison shop uses by goods categories.

Table B2 Letchworth Garden City Town Centre Breakdown of Comparison Units

Type of Unit	Letchworth Garden City			2015 % UK Average*
	Units 2009	Units 2015	% 2015	
Clothing and footwear	23	14	15.9	25.0
Furniture, carpets and textiles	10	9	10.2	7.4
Booksellers, arts, crafts and stationers	10	14	15.9	10.6
Electrical, gas, music and photography	7	7	7.9	9.4
DIY, hardware and homewares	1	4	4.5	6.4
China, glass, gifts and fancy goods	4	3	3.4	4.6
Cars, motorcycles and motor access	1	0	0	1.3
Chemists, drug stores and opticians	11	11	12.5	10.0
Variety, department and catalogue	1	3	3.4	1.6
Florists, nurserymen and seedsmen	3	2	2.3	2.3
Toys, hobby, cycle and sport	3	5	5.7	5.2
Jewellers	4	3	3.4	5.0
Charity, second-hand shops	)	5	5.7	8.4
Other comparison retailers	) 12	7	7.9	2.9
Total	**90**	**88**	**100.0**	**100.0**

Source: North Herts Land Use Surveys. *UK average for centres surveyed by Goad Plans (June 2015)

Letchworth Garden City provides most of the Goad Plan comparison categories, except for cars/ motorcycles and motor access. The choice of shops in some categories is good, i.e. clothing/footwear and booksellers arts, crafts and stationers. The choice in other categories is more limited. There are a number of major national multiple comparison retailers, these include:

- Argos
- Boots the Chemist
- Bonmarche
- Card Factory
- Claire's
- Dorothy Perkins
- Edinburgh Woollen Mill
- EE
- F Hinds
- Home Bargains
- New Look
- Peacocks
- Poundland
- Poundstretcher
- Shoe Zone
- Specsavers
- Store Twenty One
- Superdrug
- Trespass
- The Body Shop
- WH Smith
- Wilko

National multiple retailers in Letchworth Garden City are concentrated within the Garden Square Shopping Centre and on Eastcheap, with Morrison's closely located on Broadway. Independents can be found throughout the shopping centre however they are primarily located within the more peripheral areas including Arena Parade, The Arcade and The Wynd. Services are provided throughout the centre including Station Road, Station Place, and Leys Avenue.

Service Uses

Letchworth has a good range of service uses, with a choice of service providers across all of the categories, as shown in Table B3.

Table B3 Letchworth Analysis of Selected Service Uses

Type of Unit	Letchworth Garden City			% 2015 UK Average*
	Units 2009	Units 2015	%	
Restaurants/cafés	18	18	21.9	22.5
Fast food/takeaways	12	10	12.2	14.8
Pubs/bars	4	3	3.7	11.1
Banks/other financial services	9	11	13.4	11.8
Betting shops/casinos	3	3	3.7	3.8
Estate agents/valuers	8	9	11.0	9.1
Travel agents	5	5	6.1	2.2
Hairdressers/beauty parlours	21	21	25.6	22.7
Laundries/dry cleaners	3	2	2.4	2.1
Sub-Total	**83**	**82**	**100.0**	**100.0**
Other A1 Retail Services	8	14		
Total	**91**	**96**		

Source: North Herts Land Use Surveys. *UK average for town centres Goad Plans (June 2015)

The mix of services uses is also very similar to the national average, a part from a low proportion of Class A4 pubs/bars. There appears to have bene limited changes since 2009.

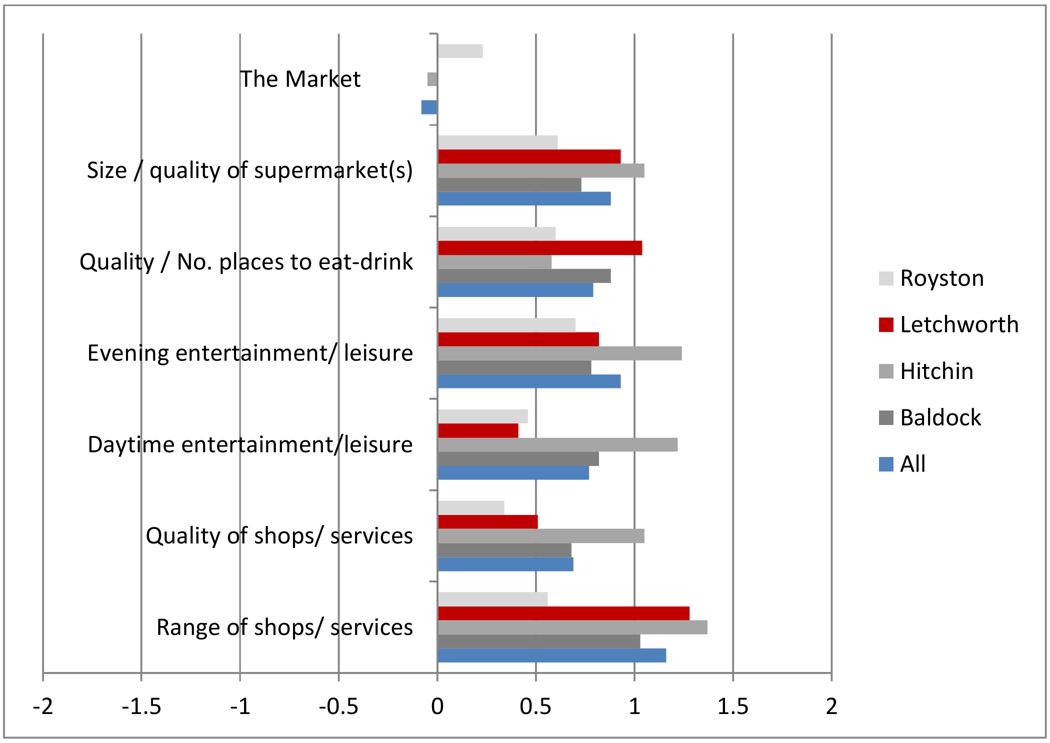
The land use data relates to April 2015. A number of new operators have recently opened in the town centre, including Wildwood Restaurant, Garden City Brewery, Premier Inn, Broadway Theatre, Crafty's Beer Shop, The Broadway Gallery and Pick a Card.

Customer Views on Shops and Services

Respondents to the in-street survey in Letchworth were asked to rate the town centre from "very poor" (-2) to "very good" (+2) in terms of seven factors relating to shops, services and entertainment/leisure facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = "quite good") for these factors.

These results suggest reasonable levels of satisfaction with shops and services. Letchworth has below average scores for entertainment and leisure facilities, but generally outscores Baldock and Royston.

Figure B.0.2 How Visitors Rate Centres for Shops, Services and Facilities (% of visitors)



Source: NEMS In-Street Survey 2016

The Supply and Quality of Commercial Premises

There are 47 vacant units in Letchworth Garden City (4,200 sq.m gross). The vacancy rate is 18.7%, which is higher than the national average (11.8%). The vacant units are generally spread throughout the centre in more peripheral areas. Vacancies generally comprise small (less than 200 sq.m gross) retail units reflecting the increasing preference for modern retailers to occupy larger retail units.

Zone A retail rents vary significantly throughout the centre. The highest Zone A rents are £675 to £700 per sq.m in Commerce Way. Elsewhere rents typically range from £200 to £500 per sq.m.

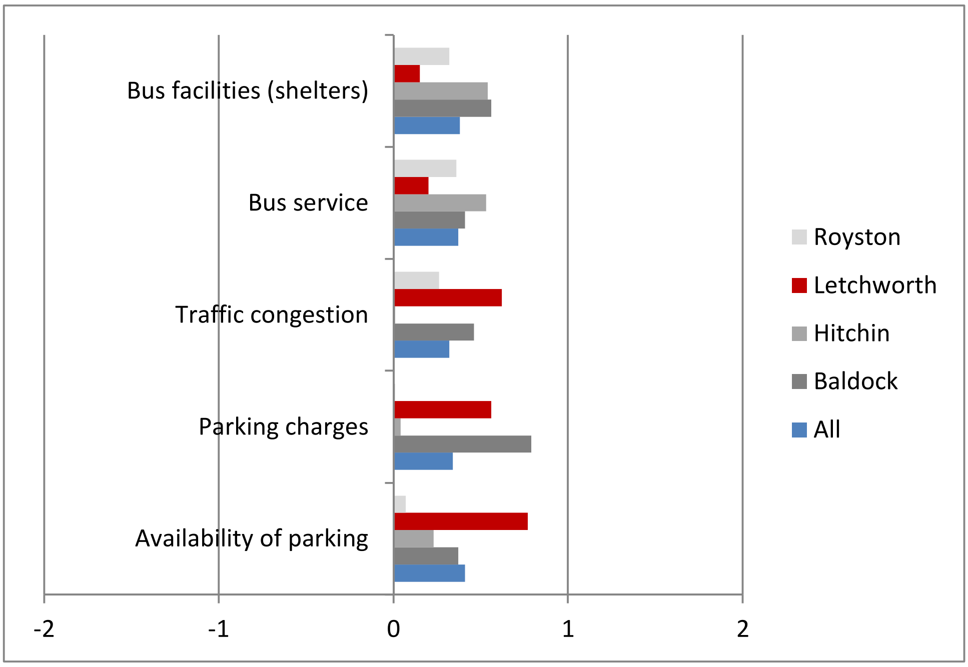
Letchworth Garden City is a compact well defined centre, with several open spaces and wide roads and pavements. Central Approach, Commerce Way and Garden Square Shopping Centre are pedestrianised and Eastcheap and Leys Avenue are pedestrian priority areas. There are several large premises located along Eastcheap, Central Approach and in the Garden Square Shopping Centre. The independent shops tend to occupy smaller units and are located predominantly on Station Road, Leys Avenue and along Arena Parade.

Accessibility and Movement

Around 11.6% of visitors interviewed in Letchworth Garden City town centre travelled to the centre by public transport (8.6% bus and 3% train), compared with the 10.3% average for all four centres in the District.

Respondents to the in-street survey in Letchworth Garden City were asked to rate the town centre from "very poor" (-2) to "very good" (+2) in terms of five factors relating to car parking, bus services and the average scores are shown in the graph below. All centres achieve positive scores for these factors, but between 0 and +1 "neither good nor poor" to "quite good". These results suggest there were mixed opinions on these facts with marginally more satisfied visitors. Views on Letchworth were generally above average for car parking and congestion, but significantly below average for bus services/facilities.

Figure B.3 How Visitors Rate Centres on Transport Issues



Source: NEMS In-Street Survey 2016

Car parking provision in Letchworth Garden City appears to be adequate. The Morrison's car park, the Garden Square multi storey car park and the Town Hall car park are the three main car parks, conveniently located in relation to the main shopping areas. There are a number of smaller car parks outside the main shopping area. There are also a number of on street car parking spaces available on a short term basis throughout the centre.

In terms of public transport accessibility, Letchworth Garden City is reasonably well served, with the main bus stops on Station Road, conveniently located in relation to the main shopping area. Bus routes link Letchworth with the surrounding town centres of Baldock, Royston and Hitchin and other areas within the North Hertfordshire District. A bus route links the town centre with the out-of-centre Sainsbury's store. Bus routes also connect Letchworth with the centres in the wider catchment including Bishops Stortford, Hatfield, Hendon, London, Luton and Stevenage, as well as Luton and Stansted Airport. These linkages, as well as assisting customer access to Letchworth Town Centre, will allow residents to shop outside Letchworth Garden City.

Letchworth Garden City train station is located on Station Place, adjacent to Letchworth Garden City Town Centre. The station benefits from direct access to London Kings Cross, Stevenage, Hitchin and Welwyn Garden City to the south, and Baldock, Royston and Cambridge to the north.

The main shopping area within Letchworth Garden City benefits from full and partially pedestrianised areas, i.e. Eastcheap, Leys Avenue, Central Approach, The Arcade and Commerce Way. This provides a high quality pedestrian environment and any traffic congestion around the town centre has limited impact on the shopping environment and does not cause significant pedestrian/vehicular conflict. Traffic flows along the un-pedestrianised Station Road are not particularly heavy.

Pedestrian movement around Letchworth is unproblematic, given the full or partial pedestrianised nature of the main shopping area. Along the periphery of the shopping area roads are open to vehicular traffic, but this is not particularly heavy, with flows greatest along Station Road, around Station Place roundabout and along the linkages around Broadway which lead to the Morrison's store. Pedestrian signage is provided throughout the centre. Footfall is greatest along Leys Avenue, Eastcheap and Garden Square Shopping Centre.

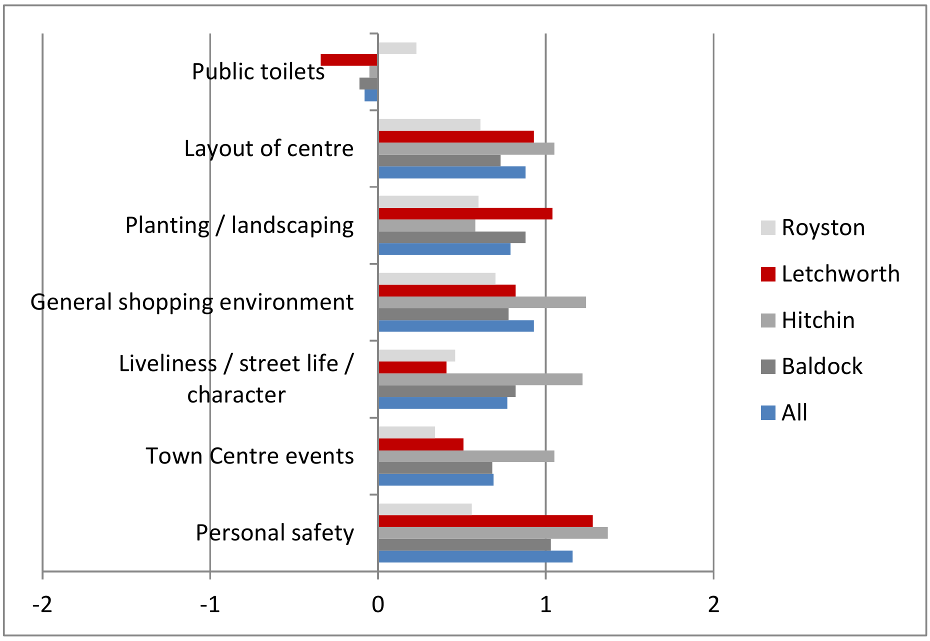
Environmental Quality

Respondents to the in-street survey in Letchworth were asked to rate the town centre from "very poor" (-2) to "very good" (+2) in terms of seven factors relating to the shopping environment, events and other facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = "quite good") for these factors, apart from public toilets with some negative scores.

These results suggest reasonable levels of satisfaction. Letchworth achieved higher than average scores for layout, landscaping and safety, but below average scores for events, liveliness, toilets and general shopping environment.

The environmental quality of Letchworth Garden City is good. Occupied retail units are generally well maintained and are of good quality. The centre has wide, clean pavements and several areas of open space and planting. Street furniture is provided along the length of Leys Avenue including benches, bins and street lighting. Partial or full pedestrianisation of the main shopping area enhances the town's sense of spaciousness.

Figure B.4 How Visitors Rate Centres on Environmental and Other Factors (% of visitors)



Source: NEMS In-Street Survey

Letchworth Garden City Heritage Foundation's 'Street Scene' improvements were implemented a few years ago within Eastcheap and Leys Avenue. Leys Square has been extended with new landscaped seating areas, water features and sculptures between the 'square' and The Platform, opposite Letchworth Garden City railway station. This significantly enhances the overall appearance of the town centre.

The town centre has a number of attractive arcades. The Arcade, which is covered, connects Leys Avenue with Station Road. This arcade has some interesting specialist retailers with attractive shop frontages.

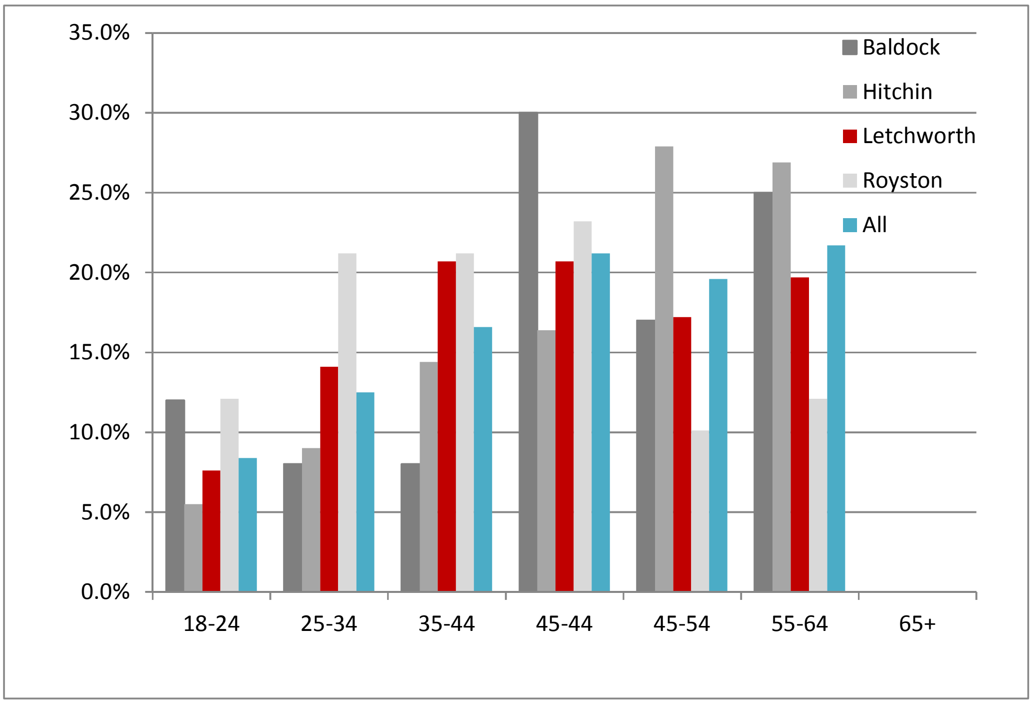
The Garden Square Shopping Centre is partially covered and located off Eastcheap with several units occupied by national retailers. However, the centre is relatively unattractive in comparison to the rest of the centre.

Visitor Profile

The age and socio economic profile of visitors interviewed during the in-street survey in Letchworth Garden City is shown in the graphs below.

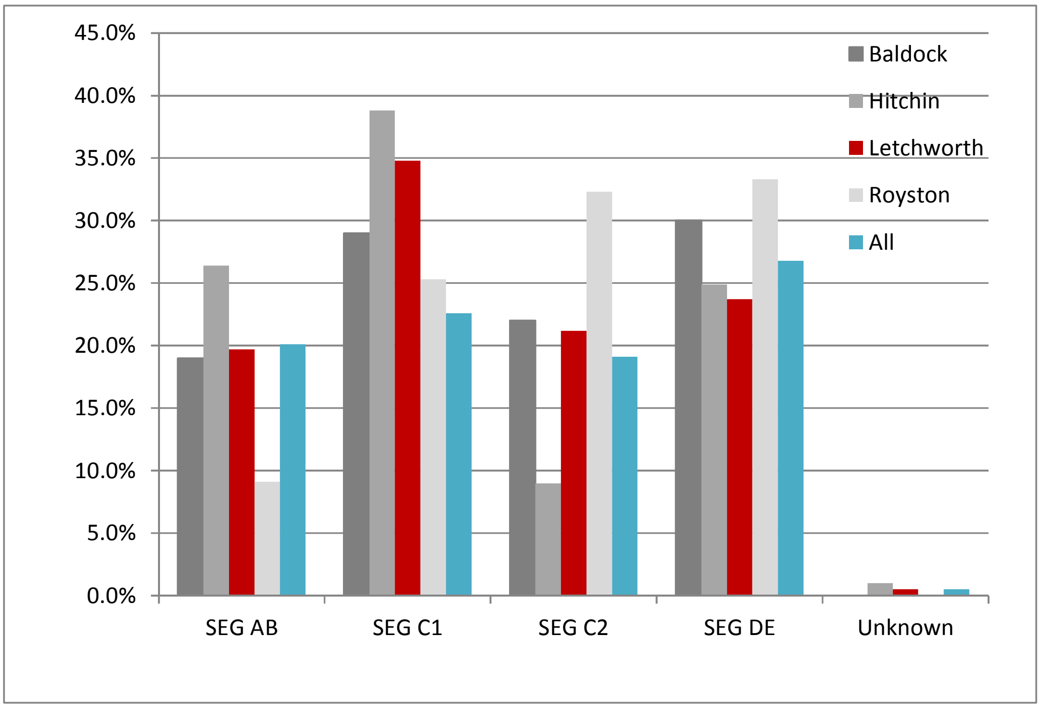
Letchworth's age and socio-economic profiles are similar to the District average for the four centres, but with slightly lower proportions of older visitors over 45 years old, and more middle socio-economic groups (C1 – office supervisors/white collar and C2 – skill manual/blue collar).

Figure B.5 Age Profile of Visitors in Each Centre



Source: NEMS In-Street Survey 2016

Figure B6 Socio-Economic Profile of Visitors



Source: NEMS In-Street Survey 2016

Letchworth's Strengths

- Letchworth Garden City is a compact well defined centre with a natural circuit for shoppers. This contributes towards a pleasant shopping environment.
- It contains a large Morrison's food store adjacent to the main shopping area, which is an important anchor store.
- Letchworth Garden City has a reasonable range of comparison goods shops, although a lower representation of comparison retailers than Hitchin. Letchworth Garden City has a number of national multiple traders.
- The Arcade, the Wynd and other secondary areas provide a range of interesting specialist retailers.
- The centre is easily accessible by a range of modes of transport other than the private car, and several centrally located car parks. Movement around the centre on foot is unproblematic with wide pavements and pedestrianised areas.
- The centre is attractively landscaped giving the centre a sense of spaciousness. Environmental improvements have enhanced the overall attractiveness of the centre.
- The centre includes the Broadway Cinema, which strengthens the evening economy.

Letchworth's Weaknesses

- The proportion of vacant units is significantly above the national average, with vacancies found throughout the centre, which suggest the supply of units is currently greater than operator demand.
- The centre has a lower amount of national multiples when compared with Hitchin and other larger centres in the sub-region such as Cambridge and Welwyn.

Letchworth's Opportunities

- Letchworth Garden City has a reasonably large and affluent catchment population. A high proportion of the expenditure generated by this catchment population leaks from the area. Population and expenditure is expected to grow in the future. If Letchworth can improve or just maintain its current share of expenditure there is potential to improve and expand retail, leisure and service uses.
- The vacant premises in the centre provide an opportunity to accommodate new facilities.
- There are a number of opportunity sites within the town centre, which could accommodate new retail/leisure uses that could help to retain more expenditure and customers in the area and possibly generate more trade for existing occupiers in Letchworth town centre.

- The Letchworth Campus of North Herts College in the Old Grammar School Building in Broadway has attracted a number of younger people to the town centre. This has broadened the customer base of the centre.

Letchworth's Threats

- Other shopping centres are likely to continue to improve their environment and retail offer, therefore the competitive gap may widen and the amount of expenditure leakage from the Letchworth Garden City area could increase. If Letchworth does not improve its range and choice of facilities the town's role in the hierarchy is likely to decline.

C. Baldock Town Centre

Baldock town centre is located in the centre of North Hertfordshire, to the east of Letchworth Garden City. It is the smallest town centre within the District and primarily serves the day-to-day shopping and service needs of local residents, although the large edge-of-centre Tesco store serves a much wider catchment area.

Baldock's key roles include:

- convenience shopping - serving the local population including a Tesco Extra, Costcutter convenience store, an off licence and butchers (the Tesco store also serves residents in Letchworth Garden City);
- comparison shopping - a limited range of specialist comparison shops;
- the outdoor market – a small street market operates on Wednesdays;
- services - including banks, a beauty salon, estate agents and hairdressers;
- community facilities – including health facilities, a library and a nursery.

The in-street survey in Baldock provides an indication of the varied role of the centre. The results indicated that that shopping was the main activity (over 31% of respondent main purpose for visiting). This figure was much lower than the figure in Hitchin and Letchworth, but similar to Royston (33%). A relatively high proportion of visitors used other services in Baldock.

The average spend per shopper on comparison goods was £7.65, which is the lowest figure in the District, and much lower than the average (£17.82). The average spend per shopper on convenience goods was £13.29, compared with the District average of £18.83. In total 36% of visitors suggested they would shop at Tesco in Baldock during their visit.

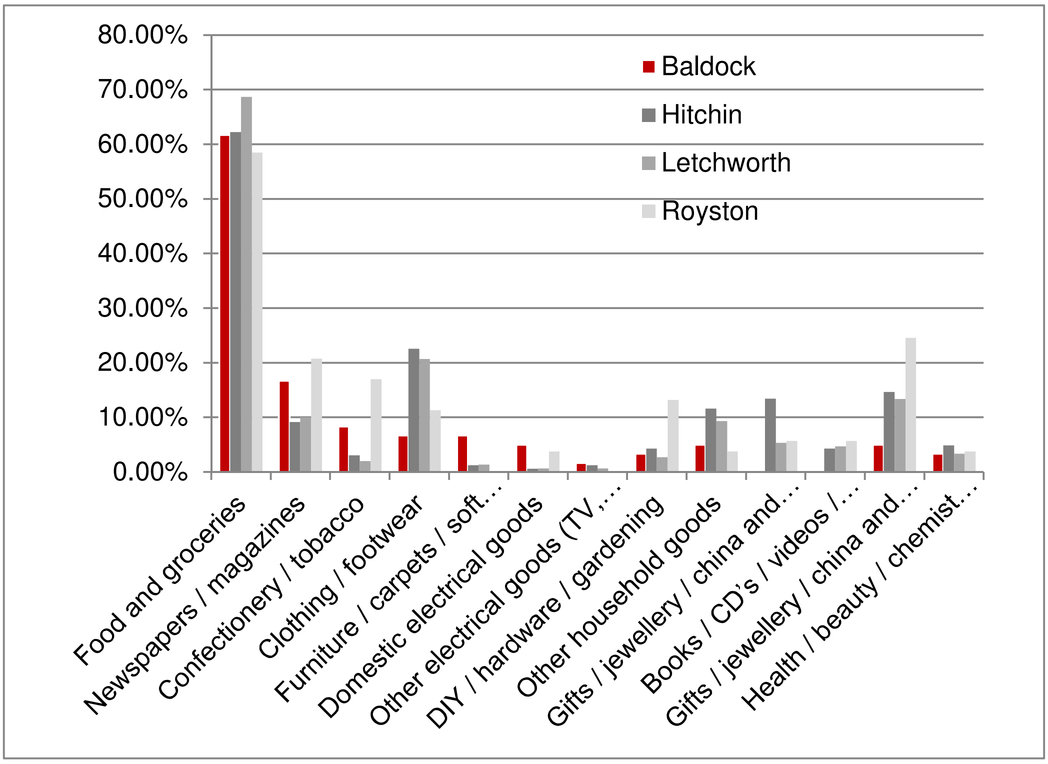
The average spend on eating and drinking out was £4.18, slightly above around the average (£3.96).

The types of products purchased by visitors are shown in the graph below. The pattern of spending suggests Baldock has low proportions of customers buying several categories of comparison goods, which reflects the limited range and choice of shops in the centre.

About 30% of visitors interviewed in Baldock town centre intended to visit leisure, entertainment or places to eat and drink, which was the slightly below the District average (35.6%).

The average length of stay in the shopping area in Baldock was only 70 minutes compared with the 90 minutes average for all four centres, which is the lowest in the District. The average frequency of trips to Baldock was 2.16 trips per week, below the average (2.27 trips per week).

Figure C1 Types of Goods Purchased in Each Centre (% of Visitors)



Source: NEMS In-Street Survey 2016

Mix of Uses and Occupier Representation

Baldock has a total of 92 retail/service units as set out in Table C.1 as at April 2015, compared against the national average.

Table C1 Baldock Use Class A Mix by Unit

Type of Unit	Units 2009	Units 2015	% of Units 2015	
			Baldock %	UK Average (1)
A1 Comparison Retail	25	24	26.1	35.8
A1 Convenience Retail	4	5	5.4	8.4
A1 Services (1)	17	19	20.7	12.3
A2 Services (2)	14	11	12.0	12.3
A3 Restaurants/Cafés	13	13	14.1	9.0
A4 Pubs/bar	8	9	9.8	4.5
A5 Takeaways	4	5	5.4	5.9
Vacant	13	6	6.5	11.8
Total	**98**	**92**	**100.0**	**100.0**

Source: North Herts Land Use Surveys April 2015.
(1) UK average for all town centres surveyed by Goad Plans (2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

Baldock has a relatively low proportion of both comparison and convenience retail uses and much higher proportions of services uses, in particular A1 services, Class A3 and A4 uses. The mix of uses has not changed significantly between 2009 and 2015, although the vacancy rate has fallen, which may be due in part to a reduced number of Class A uses.

Baldock has a limited range and choice of comparison goods shops as shown in Table C2. A number of the Goad goods categories are not represented and the choice in other categories is limited.

Table C2 Baldock Town Centre Breakdown of Comparison Units

Type of Unit	Baldock			2015 % UK Average*
	Units 2009	Units 2015	% 2015	
Clothing and footwear	1	0	0	25.0
Furniture, carpets and textiles	6	4	16.7	7.4
Booksellers, arts, crafts and stationers	1	3	12.5	10.6
Electrical, gas, music and photography	4	3	12.5	9.4
DIY, hardware and homewares	1	2	8.3	6.4
China, glass, gifts and fancy goods	0	1	4.2	4.6
Cars, motorcycles and motor access	2	0	0	1.3
Chemists, drug stores and opticians	2	2	8.3	10.0
Variety, department and catalogue	0	0	0	1.6
Florists, nurserymen and seedsmen	3	0	0	2.3
Toys, hobby, cycle and sport	2	0	0	5.2
Jewellers	0	0	0	5.0
Charity, second-hand shops	)	3	12.5	8.4
Other comparison retailers	) 3	6	25.0	2.9
Total	**25**	**24**	**100.0**	**100.0**

Source: North Herts Land Use Surveys. *UK average for centres surveyed by Goad Plans (June 2015)

Nearly all of the comparison goods retailers are small independent outlets, with the exception of charity shops and Lloyds Pharmacy.

Service Uses

Baldock has a good range of service uses for a centre of its size. There is a choice of services across all of the categories, as shown in Table C3. The provision of pub/bars is particularly strong.

Table C3 Baldock Analysis of Selected Service Uses

Type of Unit	Baldock			% 2015 UK Average*
	Units 2009	Units 2015	%	
Restaurants/cafés	13	13	26.0	22.5
Fast food/takeaways	5	5	10.0	14.8
Pubs/bars	8	9	18.0	11.1
Banks/other financial services	6	5	10.0	11.8
Betting shops/casinos	2	2	4.0	3.8
Estate agents/valuers	5	4	8.0	9.1
Travel agents	0	0	0	2.2
Hairdressers/beauty parlours	9	11	22.0	22.7
Laundries/dry cleaners	1	1	2.0	2.1
Sub-Total	**49**	**50**	**100.0**	**100.0**
Other A1 Retail Services	7	7		
Total	**56**	**57**		

Source: North Herts Land Use Surveys. *UK average for all town centres Goad Plans (June 2015)

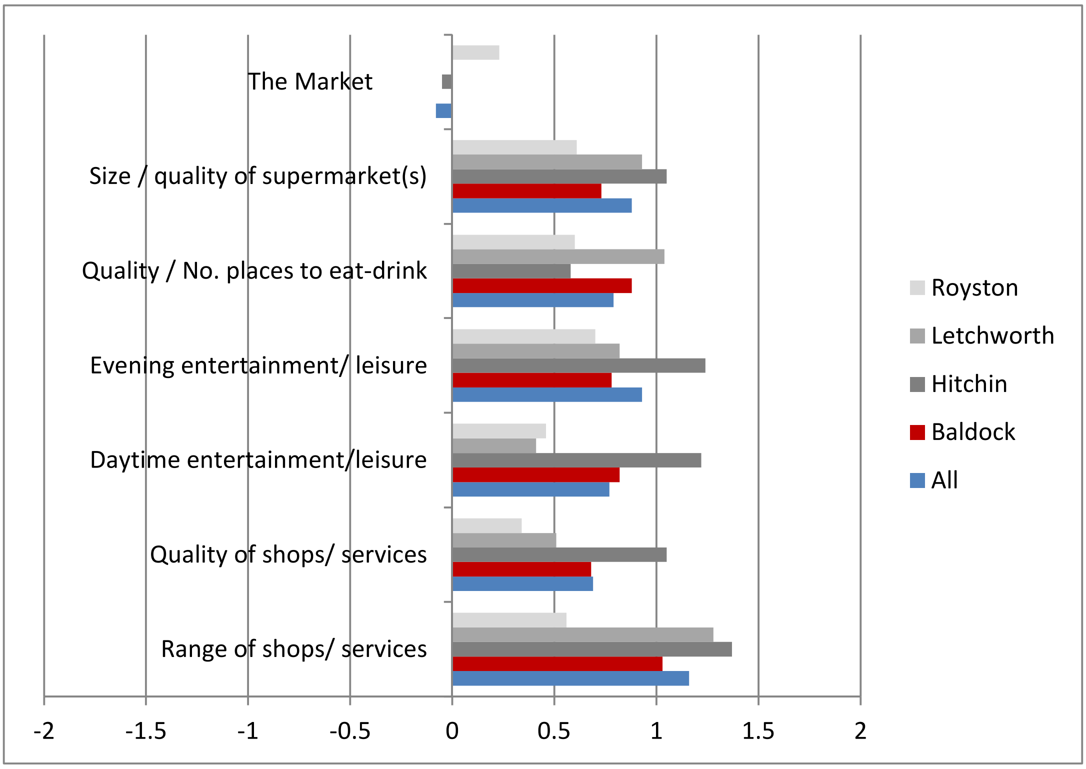
In addition to Class A service uses Baldock has several other non-retail uses including a hotel, doctors/dental surgeries, library, vet and churches.

Customer Views on Shops and Services

Respondents to the in-street survey in Baldock were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of seven factors relating to shops, services and entertainment/leisure facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = “quite good”) for these factors.

These results suggest reasonable levels of satisfaction with shops and services. Baldock achieved similar scores when compared with the average for all centre.

Figure C2 How Visitors Rate Centres for Shops, Services and Facilities (% of visitors)



Source: NEMS In-Street Survey 2016

Supply and Quality of Commercial Premises

There are only 6 vacant units in Baldock. The vacancy rate is half the national average. Most of these vacant units are small (under 200 sq.m). Baldock is a historic town and most premises are small and old but are in a good condition.

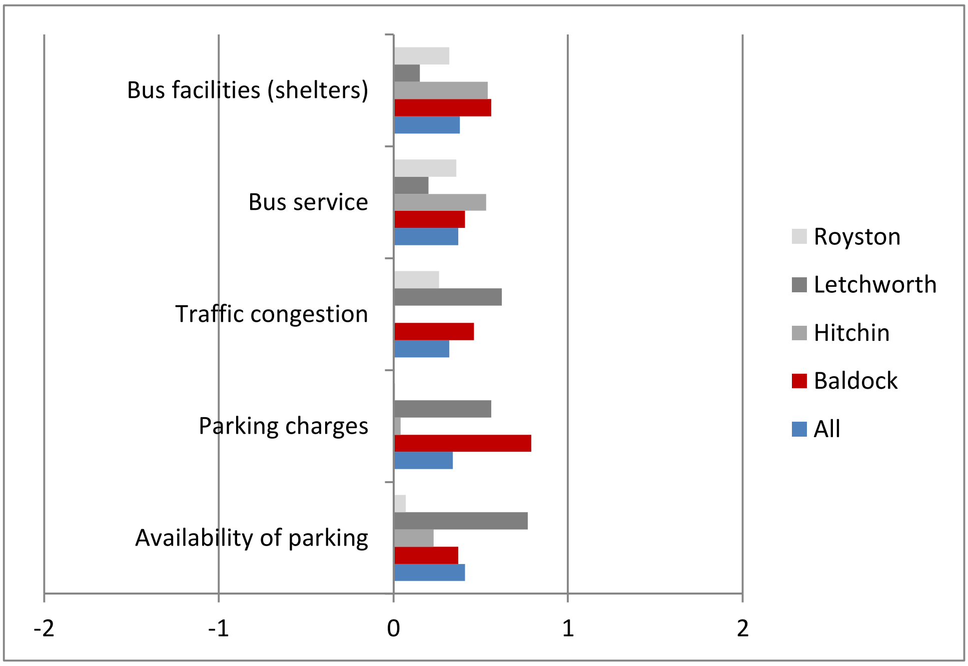
The highest Zone A retails rents are £275 per sq.m, much lower than Hitchin and Letchworth Garden City. Rents in the peripheral parts of the centre range from £100 to £200 per sq.m.

Accessibility and Movement

Only 2% of visitors interviewed in Baldock town centre travelled to the centre by public transport, compared with the 10.3% average for all four centres.

Respondents to the in-street survey in Baldock were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of five factors relating to car parking, bus services and the average scores are shown in the graph below. All centres achieve positive scores for these factors, but between 0 and +1 “neither good nor poor” to “quite good”. These results suggest there were mixed opinions on these facts with marginally more satisfied visitors.

Figure C3 How Visitors Rate Centres on Transport Issues



Source: NEMS In-Street Survey 2016

Views on Baldock were above average, apart from car parking availability.

Off-street car parking provision in Baldock is provided at the Twitchell car park, located to the rear of the Community Centre off Simpson Drive, and the large Tesco Extra car park. There is a reasonable amount of on-street car parking provided in the market area on High Street, along High Street, Whitehorse Street, Hitchin Street and Sun Street. This is all free for short term stays. The combination of on and off street car parking space within the town centre and at Tesco store provide adequate parking space for a town the size of Baldock.

The centre is served by a number of bus routes which connect Baldock with the surrounding rural area as well as Hitchin, Royston and Letchworth Garden City. Bus routes also connect the centre with Bishops Stortford, Cambridge, Hendon, London, Luton, Stevenage and the Hatfield. There are also bus routes that connect Baldock with Heathrow, Stansted and Luton airports. National Express buses stop at Baldock on the route from Stevenage to Stansted

Airport. These linkages, as well as assisting customer access to the town centre, will allow local residents to shop outside Baldock.

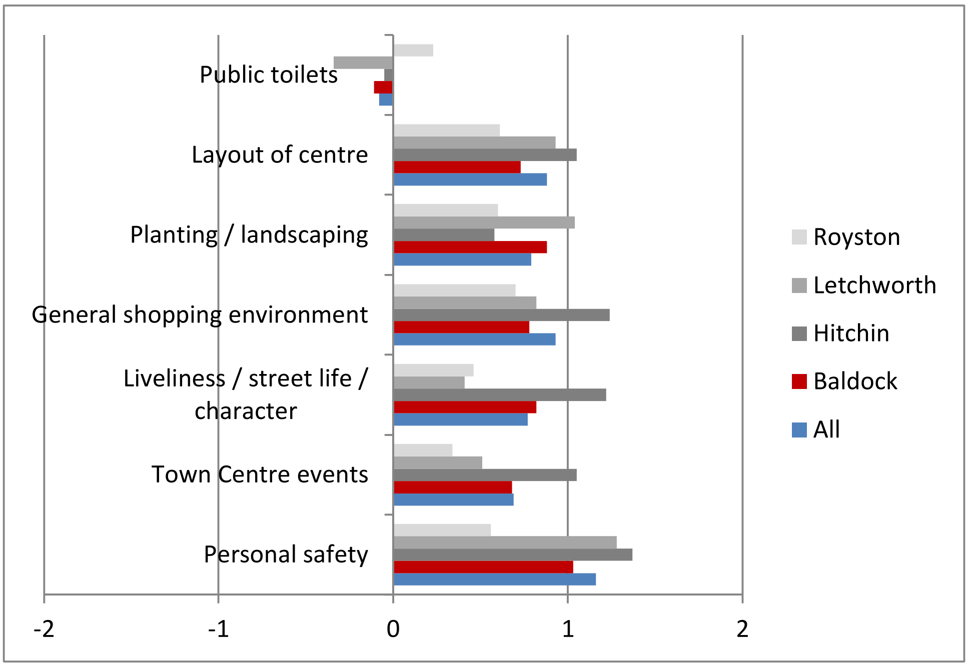
Baldock Station is located to the north of the centre, on the railway line from Kings Cross to Cambridge. The trains run approximately every half an hour, connecting the centre with Hitchin, Royston and Letchworth Garden City as well as Welwyn Garden City and Stevenage. At Hitchin you can change for connections to Peterborough.

The centre is a ‘T’ shape, with the High Street forming the spine and Whitehorse Street and Hitchin Street branching off this. These roads have relatively high traffic flows, and retail units on either side, which does impede pedestrian movement through the centre although there are some pedestrian crossings throughout. Baldock has limited pedestrianised areas but the High Street has wide pavements. There us a small pedestrianised area along the southern end of Church Street.

Environmental Quality

Respondents to the in-street survey in Baldock were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of seven factors relating to the shopping environment, events and other facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = “quite good”) for these factors, apart from public toilets with some negative scores.

Figure C4 How Visitors Rate Centres on Environmental and Other Factors (% of visitors)



Source: NEMS In-Street Survey 2016

These results suggest reasonable levels of satisfaction. Baldock achieved higher than average scores for landscaping and liveliness, but below average scores for safety, layout, toilets and general shopping environment.

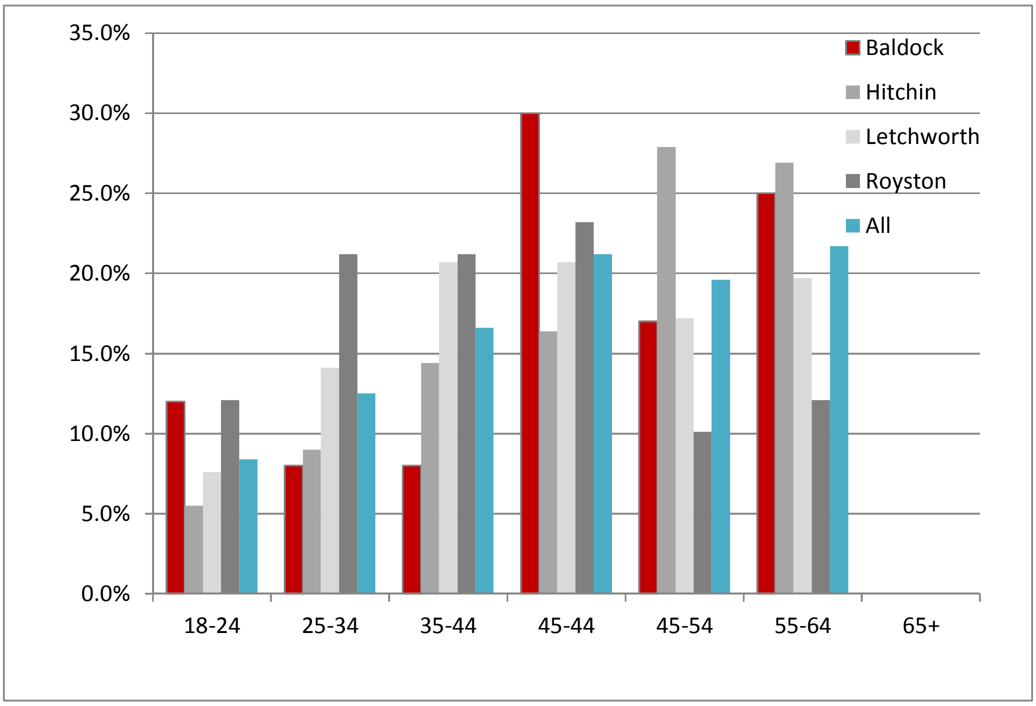
The High Street in Baldock is a wide attractive tree lined street, with large landscaped areas on either side. A landscaped area in front of the Methodist Church on Whitehorse Street is an attractive area of space, which is landscaped with some wooden benches. Baldock has created a high quality public realm, whilst conserving and promoting the historic character and layout of Baldock town centre.

The level of traffic is the main factor reducing the attractiveness of the shopping environment.

Visitor Profile

The age and socio economic profile of visitors interviewed during the in-street survey in Baldock is shown in the graphs below.

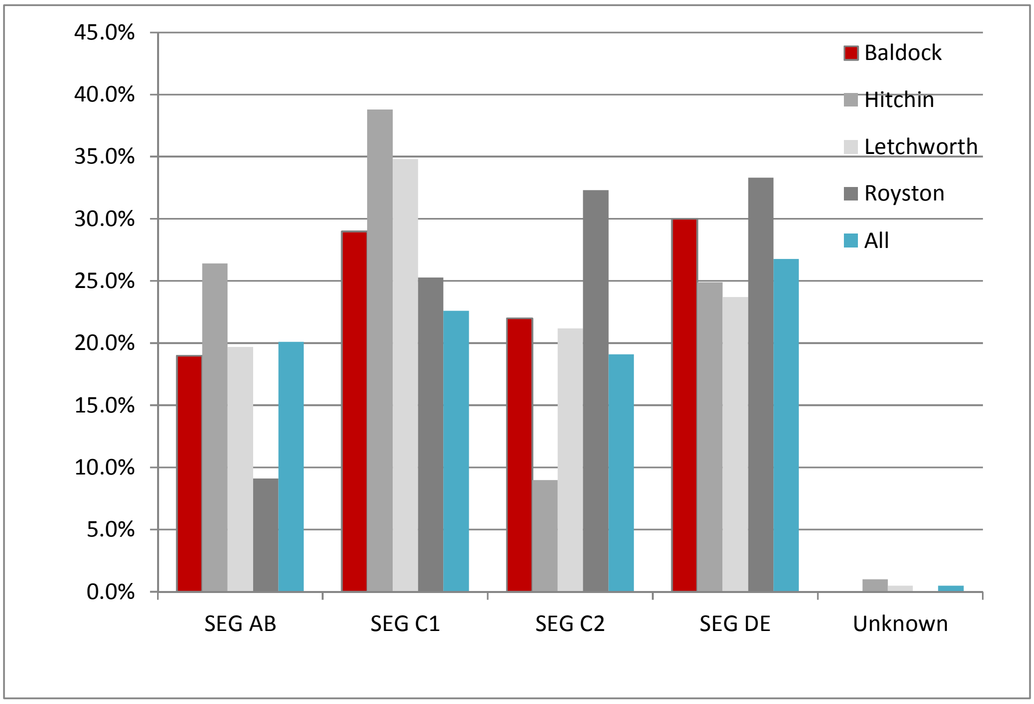
Figure C5   Age Profile of Visitors in Each Centre



Source: NEMS In-Street Survey 2016

Baldock's age and socio-economic profiles are similar to the District average for the four centres, with a broad mix of age groups and socio-economic groups.

Figure C6   Socio-Economic Profile of Visitors



Source: NEMS In-Street Survey 2016

Baldock's Strengths

- The centre primarily serves the day to day shopping and service needs of local residents. The edge of centre Tesco also provides main and bulk food shopping facilities.
- Baldock is a historic market town with some attractive period buildings and pleasant environment. The centre has a wide and attractive tree lined High Street and a high quality public realm.
- The shop vacancy rate is much lower than the national average.
- There is adequate on street parking provided within the centre and off-street parking at the Tesco store and the Twitchell Car Park.
- Baldock has an established evening economy with a good selection of restaurants, pubs and bars for a centre of its size.

Baldock's Weaknesses

- High volumes of traffic along Hitchin Street and Whitehorse Street have an adverse impact on the shopping environment and pedestrian movement.
- The large Tesco store is located on the edge of the centre and provides an extensive range of food and non-food goods, which may reduce the need for some customers to visit other shops and services in the town centre during their visit.
- The shops are fragmented with several breaks in retail frontage including office and dwellings located on the High Street.

- Many of the shops are converted dwellings and are not modern purpose built premises.
- There is a limited range of retail shops and services, including only one national multiple retailer located in the centre. There are very few comparison retailers within Baldock.

Baldock's Opportunities

- Expenditure generated by residents within the centre is expected to grow in the future, which should provide opportunities to improve the range and choice of shops and services in the town.
- The Tesco store located on the edge of Baldock town centre attracts a significant number of customers. If more of these customers can be attracted to other shops and services in the town centre then the vitality and viability of the town centre would be significantly improved. There may be an opportunity to improve and upgrade pedestrian linkages through the memorial gardens from Tesco to the High Street.
- The small outdoor market operates only on Wednesdays. There may be scope to expand and improve the market.

Baldock's Threats

- Baldock town centre provides limited opportunities/vacant units to expand facilities within the town centre. If Baldock does not improve its range and choice of facilities the town's role could diminish.
- The town centre is dominated by independent traders. If independent traders close in the future the availability of new occupiers is uncertain and the number of vacant units could increase, which may undermine the vitality and viability of the town centre.
- The Tesco store dominates shopping within Baldock. If the Tesco store improves or extends the range of products and services it provides then the store may increasingly become a one-stop shop, which could reduce the numbers of customers who visit shops and services within Baldock town centre.

D. Royston Town Centre

Royston town centre is situated in the north east of the District, south west of Cambridge. It is a small historic market town centre located to the north east of Hitchin, Letchworth Garden City and Baldock. The primary shopping area is the High Street extending from Melbourn Street to Market Hill. Several streets connect the High Street with Market Hill including Angel Pavement arcade. The centre primarily serves the day-to-day shopping and service needs of local residents.

Royston's key roles include:

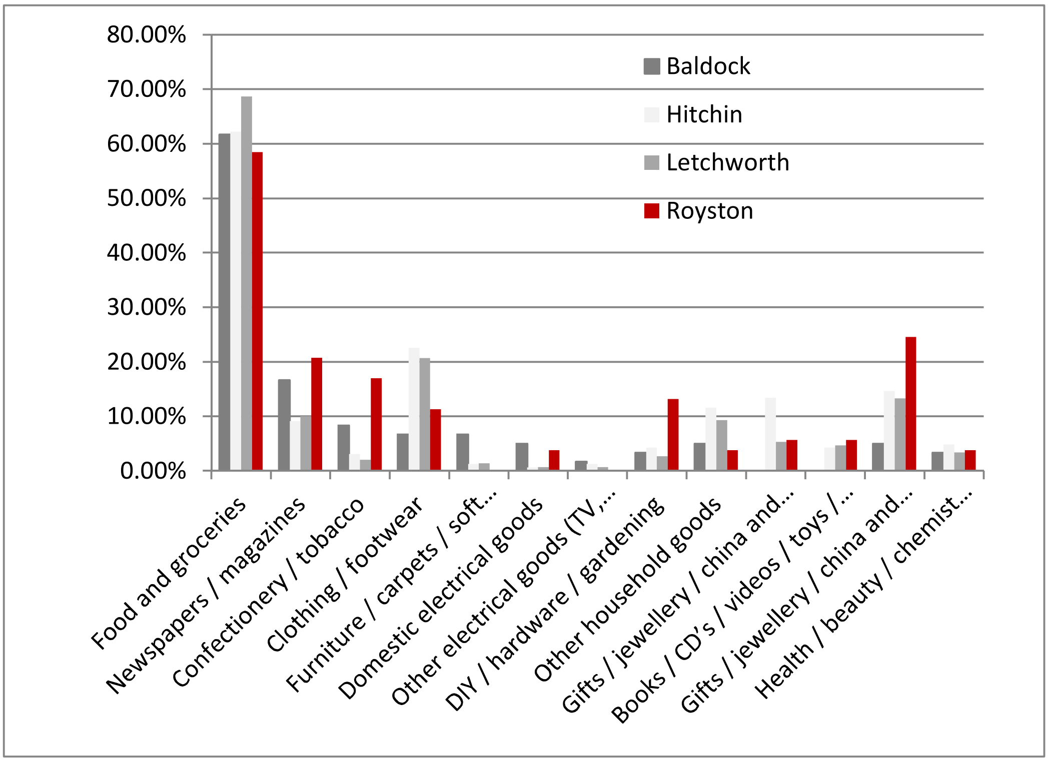
- convenience shopping – there is a limited range of convenience traders serving day to day needs. These include the Morrison's supermarket, newsagents and grocers;
- lower order comparison shopping - a basic range of comparison shops primarily serving lower order shopping needs. There is a small range of multiples mainly located on the High Street, including Boots and WH Smith;
- services - including banks, takeaways and hairdressers/beauty parlours;
- entertainment –including several restaurants, pubs and social clubs; and
- community facilities – several health facilities including dentists, doctors and a health centre, a library and nursery.

The in-street survey in Royston provides an indication of the varied role of the town centre. The results indicated that that shopping was the main activity (over 33% of respondent main purpose for visiting). This figure was much lower than the figure in Hitchin and Letchworth, but higher than Baldock (31%). A relatively high proportion of visitors work in Royston. The average spend per shopper on comparison goods was £15.28, which is the second lowest figure in the District, and marginally lower than the average (£17.82). The average spend per shopper on convenience goods was £23.33, compared with the District average of £18.83.

The average spend on eating and drinking out was £3.91, which is around the average (£3.96).

The types of products purchased by visitors are shown in the graph below. The pattern of spending is similar to other centres in the District. However Royston has high proportions of customers buying newspapers/magazines, confectionery/ tobacco, DIY/hardware/gardening and gifts/jewellery/china/glass.

Figure D1 Types of Goods Purchased in Each Centre (% of Visitors)



Source: NEMS In-Street Survey 2016

About 30% of visitors interviewed in Royston town centre intended to visit leisure, entertainment or places to eat and drink, which was the slightly below the District average (35.6%).

The average length of stay in the shopping area in Royston was 102 minutes compared with the 90 minutes average for all four centres. Royston has the highest length of stay. The average frequency of trips to Royston was 2.09 trips per week, slightly below the average (2.27 trips per week).

Royston has a total of 162 retail/service units. The diversity of uses present in in terms of the number of ground floor units is set out in Table D.1 as at April 2015, compared against the national average.

The centre has a broadly similar mix of uses compared with the national average. The proportions of comparison and convenience retail units is lower than the national average, whilst the proportions of non-retail services (A1, A2, A3 and A5) are all slightly above the national average, with the exception of A4 pubs/bars. The proportion of vacant units is above the national average.

Between 2009 and 2015 the number of comparison shop units reduced by 9 outlets, with the number of vacant units increasing by 7 units. It should be noted the land use figures relate to April 2015. More recent evidence suggests a number of vacant units in Royston have been reoccupied, and the vacancy rate is now under 12% rather than 14.2%.

Table D1 Royston Centre Use Class A Mix by Unit

Type of Unit	Units 2009	Units 2015	% of Units 2015	
			Royston	UK Average [1]
A1 Comparison Retail	59	50	30.9	35.8
A1 Convenience Retail	7	8	4.9	8.4
A1 Services [1]	24	23	14.2	12.3
A2 Services [2]	29	26	16.0	12.3
A3 Restaurants/Cafés	13	15	9.3	9.0
A4 Pubs/bar	6	7	4.3	4.5
A5 Takeaways	9	10	6.2	5.9
Vacant	16	23	14.2	11.8
Total	**163**	**162**	**100.0**	**100.0**

Source: North Herts Land Use Surveys April 2015.
(1) UK average for all town centres surveyed by Goad Plans (2015)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods
(3) Class A2 includes betting shops and pay day loan shops – reclassified as Sui Generis from April 2015.

The number of units in all other sectors has not changed significantly, which suggests the increase in vacant shops is due to a decline in the comparison goods sector.

Royston has a smaller number of comparison shops (55 units) in comparison with Letchworth Garden City and Hitchin. Most of the Goad Plan comparison categories are represented within the centre, although the choice of units within some categories is limited. There is a reasonable choice of clothing/footwear shops and chemists/opticians. The proportion of charity shops is higher than the national average.

Table D2 Royston Town Centre Breakdown of Comparison Units

Type of Unit	Royston			2015 % UK Average*
	Units 2009	Units 2015	% 2015	
Clothing and footwear	15	11	22.0	25.0
Furniture, carpets and textiles	3	1	2.0	7.4
Booksellers, arts, crafts and stationers	4	2	4.0	10.6
Electrical, gas, music and photography	4	1	2.0	9.4
DIY, hardware and homewares	3	2	4.0	6.4
China, glass, gifts and fancy goods	2	5	10.0	4.6
Cars, motorcycles and motor access	2	1	2.0	1.3
Chemists, drug stores and opticians	5	7	14.0	10.0
Variety, department and catalogue	0	0	0	1.6
Florists, nurserymen and seedsmen	3	3	6.0	2.3
Toys, hobby, cycle and sport	3	3	6.0	5.2
Jewellers	6	2	4.0	5.0
Charity, second-hand shops	)	6	12.0	8.4
Other comparison retailers	) 10	6	12.0	2.9
Total	**59**	**50**	**100.0**	**100.0**

Source: North Herts Land Use Surveys. *UK average for centres surveyed by Goad Plans (June 2015)

There is a limited number of multiple retailers. Major national comparison retailers present in the centre include Boots the Chemist, WH Smith, Lloyds Pharmacy, Store Twenty One and Card Factory. National multiple retailers in Royston are mainly located on the High Street. with the Morrison's store closely located on Baldock Street.

Service Uses

Royston Centre has a reasonable range of service uses, with a choice of service providers across all of the categories, as shown in Table D3.

Table D3 Royston Analysis of Selected Service Uses

Type of Unit	Royston			% 2015 UK Average*
	Units 2009	Units 2015	%	
Restaurants/cafés	13	15	19.7	22.5
Fast food/takeaways	9	10	13.2	14.8
Pubs/bars	6	7	9.2	11.1
Banks/other financial services	18	15	19.7	11.8
Betting shops/casinos	3	2	2.6	3.8
Estate agents/valuers	8	9	11.8	9.1
Travel agents	2	2	2.6	2.2
Hairdressers/beauty parlours	15	14	18.4	22.7
Laundries/dry cleaners	3	2	2.6	2.1
Sub-Total	**77**	**76**	**100.0**	**100.0**
Other A1 Retail Services	4	5		
Total	**81**	**81**		

Source: Goad 2015 *UK average for all town centres surveyed by Goad Plans (June 2015)

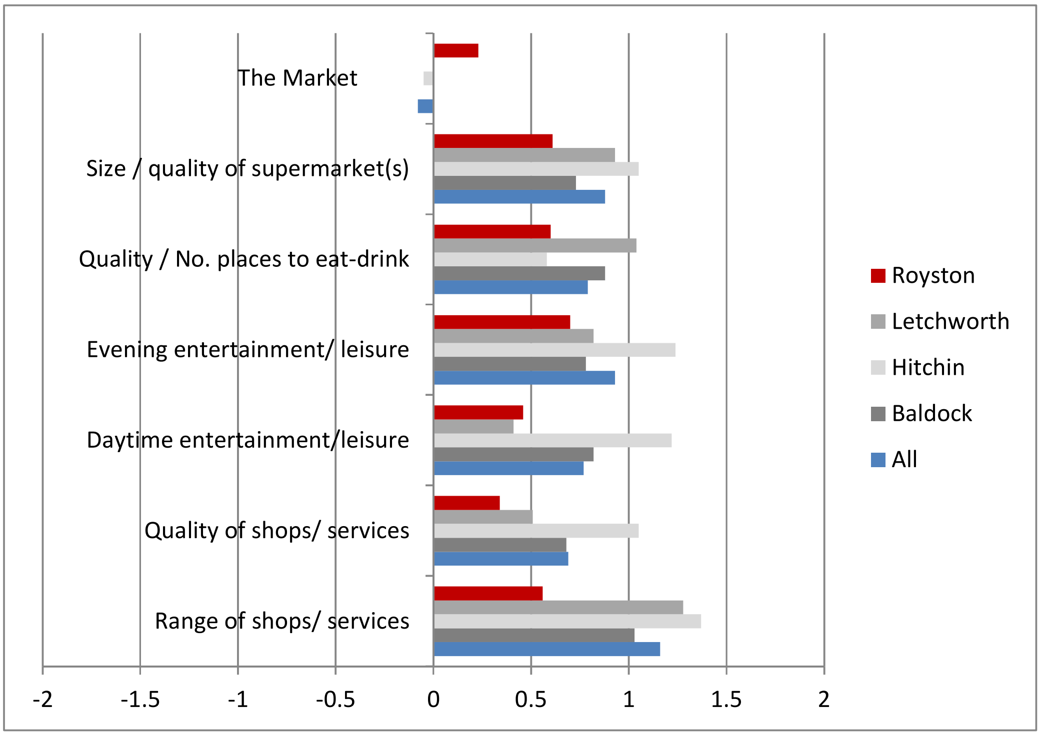
Royston has retained its choice of service uses since 2009. The proportion of units in Royston remains broadly similar to the national average. There have been limited changes since 2009.

In addition to Class A service uses, Royston has several other non-retail uses including the Royston Picture Palace cinema, a museum, doctors/dental surgeries, library, social clubs, nightclub and churches.

Respondents to the in-street survey in Royston were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of seven factors relating to shops, services and entertainment/leisure facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = “quite good”) for these factors.

These results suggest reasonable levels of satisfaction with shops and services across all centres, but Royston was below average for all factors.

Figure D2 How Visitors Rate Centres for Shops, Services and Facilities (% of visitors)



Source: NEMS In-Street Survey 2016

Supply and Quality of Commercial Premises

There were 23 vacant units in Royston Town Centre (3,200 sq.m gross) in April 2015. The vacancy rate was above the national average. Recent evidence suggests that 12 vacant units have been re-occupied since April 2015, although 4 have changed to non-Class A uses.

The vacant units are generally spread throughout the centre with 9 vacant units on the High Street in April 2015. The vacant units range in size from around 40 to 400 sq.m gross.

Royston has predominantly small retail properties and only a limited number of medium to large units available, primarily due to the predominance of historic buildings. Most premises are in a reasonable or good condition.

The highest Zone A retails rents are £325 per sq.m, higher than Baldock but much lower than Hitchin and Letchworth Garden City. Rents in the peripheral parts of the centre range from £100 to £250 per sq.m.

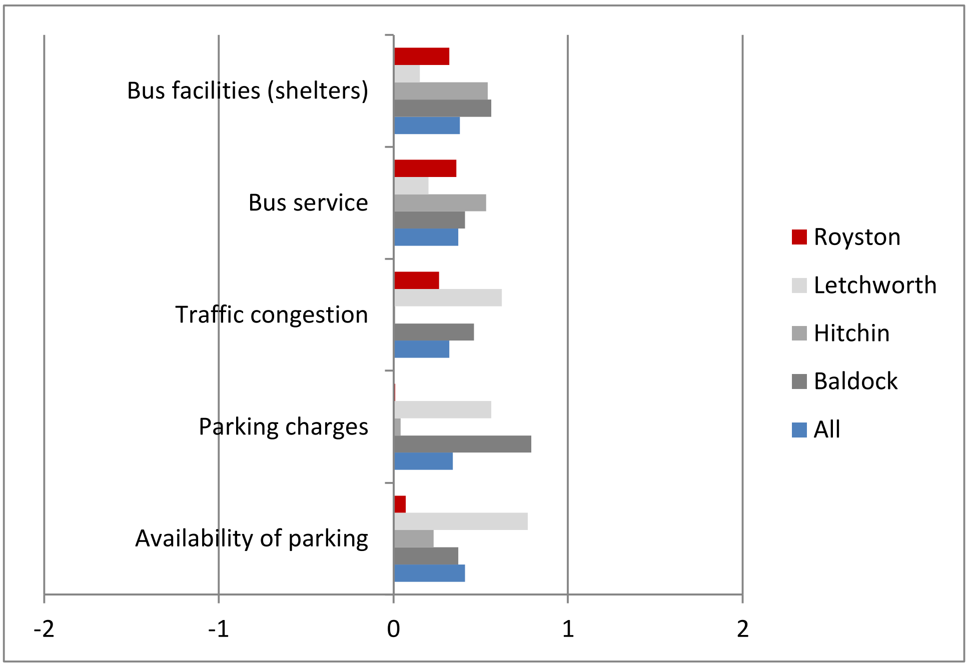
Accessibility and Movement

Just over 13% of visitors interviewed in Royston town centre travelled to the centre by public transport, compared with the 10.3% average for all four centres in the District.

Respondents to the in-street survey in Royston were asked to rate the town centre from “very poor” (-2) to “very good” (+2) in terms of five factors relating to car parking, bus services and the average scores are shown in the graph below. All centres achieve positive scores for these factors, but between 0 and +1 “neither good nor poor” to “quite good”. These results suggest there were mixed opinions on these facts with marginally more satisfied visitors.

Views on Royston were below average for all factors, particularly car parking.

Figure D3 How Visitors Rate Centres on Transport Issues



Source: NEMS In-Street Survey 2016

The town centre has several car parks and at the time of our site visit these appeared to be well used, although respondents still rated car parking lower than other centres. This includes the Morrison car park, Princes Mews, Market Place, The Warren, Priory Gardens, Market Hill and Angel Pavement. The Civic Centre/Town Hall car park has additional spaces. These car parks are conveniently located in relation to the main shopping area.

Bus routes serving Royston, these routes connect the centre with the surrounding rural area, as well as Hitchin, Letchworth Garden City and Baldock. Further afield buses connect Royston with Cambridge, Foxton, Harston, Buntingford, and Hertford. Three bus routes provide a circular route around the town centre and there is a bus route from Royston bus station to Royston’s Tesco Supermarket. There is a National Express service from Cambridge to Heathrow Airport which stops at Royston. These linkages, as well as assisting customer access to the town centre, will allow local residents to shop outside Royston.

Royston train station serves Hitchin, Letchworth Garden City and Baldock. Trains stop in Royston approximately every half an hour provide direct access to London Kings Cross, Stevenage, Welwyn Garden City and Cambridge. At Hitchin you can change for connections to Peterborough, but the train station is not conveniently located in relation to the town centre. There are bus services linking the train station with the town centre.

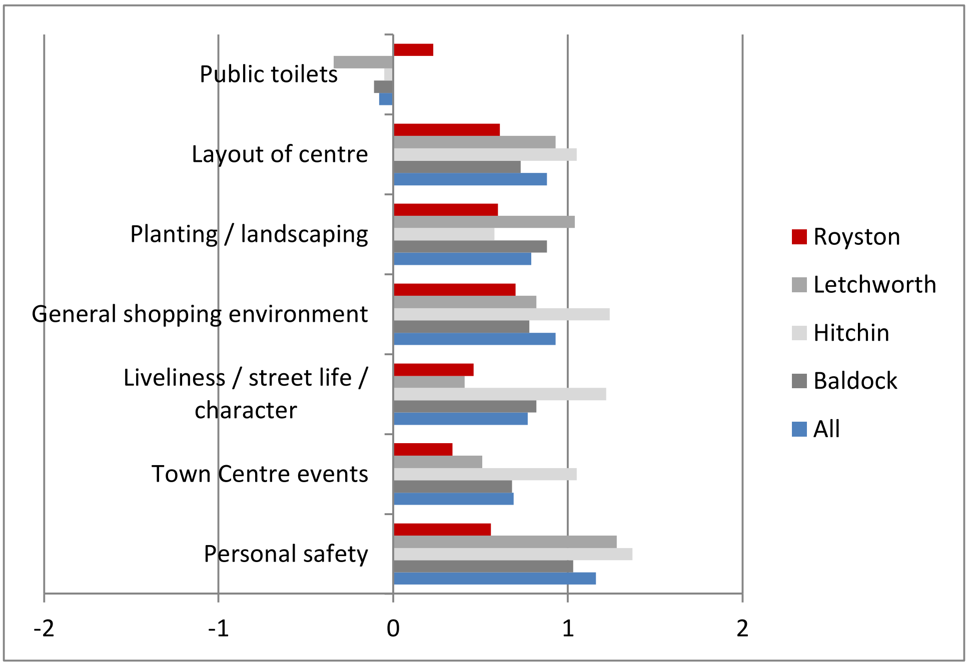
Pedestrian flows appear to be heaviest along the High Street and near Angel Pavement, which is the main shopping area within the centre and around the entrance to the Morrison's store. Flows were quieter along peripheral areas such as Baldock Street and Kneesworth Street. The street layout provides a natural circuit for pedestrians, along the High Street, through Angel Pavement and along Market Hill. This enhances pedestrian movement through the town.

Environmental Quality

Respondents to the in-street survey in Royston were asked to rate the town centre from "very poor" (-2) to "very good" (+2) in terms of seven factors relating to the shopping environment, events and other facilities. The average scores are shown in the graph below. All centres achieve positive scores approaching or above 1 (NB – 1 = "quite good") for these factors.

These results suggest reasonable levels of satisfaction, but the scores are below average in Royston.

Figure D4 How Visitors Rate Centres on Environmental and Other Factors (% of visitors)



Source: NEMS In-Street Survey 2016

The environmental quality in Royston is generally good. The town centre is a designated conservation area with many listed buildings and buildings of local interest, which add to the historic character and ambience of the centre.

There are areas of high quality public realm within the centre, including “Fish Hill Square” to the north of Market Hill and Fish Hill, and the “Cross” area where Upper King Street meets the High Street and where Lower King Street meets Melbourn Street. This includes landscaping, benches and public art. These areas enhance the overall quality of the centre.

Priory Gardens to the east of the main shopping area provides green open space and increases the perception of an environmentally attractive centre.

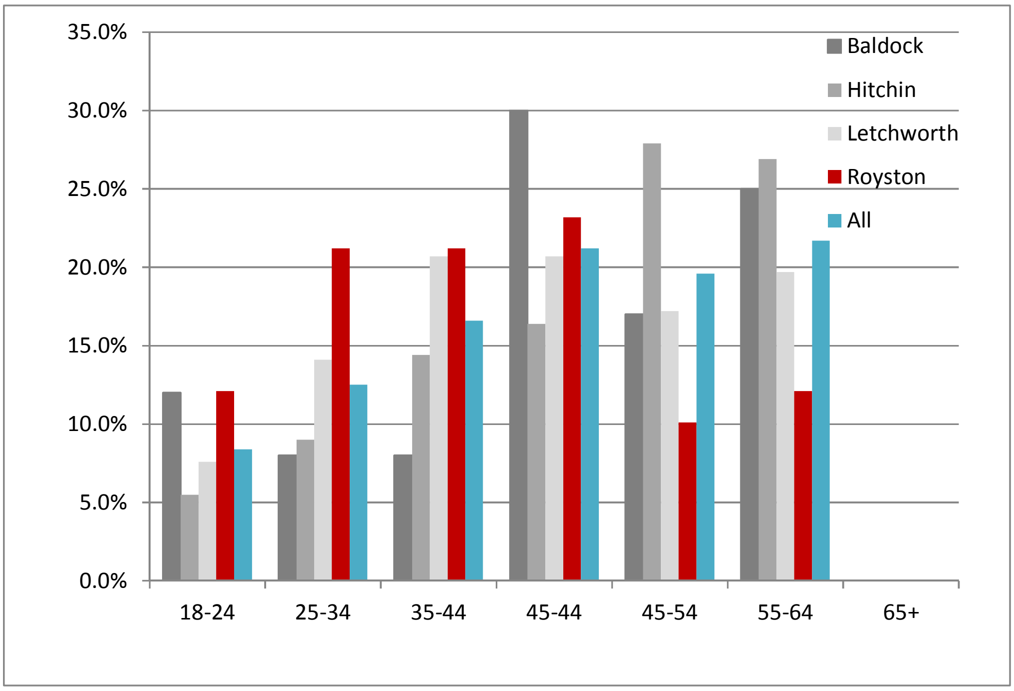
The High Street is relatively attractive and safe, but due to narrow pavements in places there is limited street furniture or landscaping.

To the south of the town centre is Angel Pavement, a small uncovered shopping mall, linking the High Street to Market Hill. Market Hill and Fish Hill are not pedestrianised and traffic and parked cars detract from the overall appearance of this part of the centre. However public realm works in Fish Hill have improved this area. The buildings within the town centre are a mix of architectural styles and varying quality, but most units are in reasonable or good condition.

Visitor Profile

The age and socio economic profile of visitors interviewed during the in-street survey in Royston is shown in the graphs below.

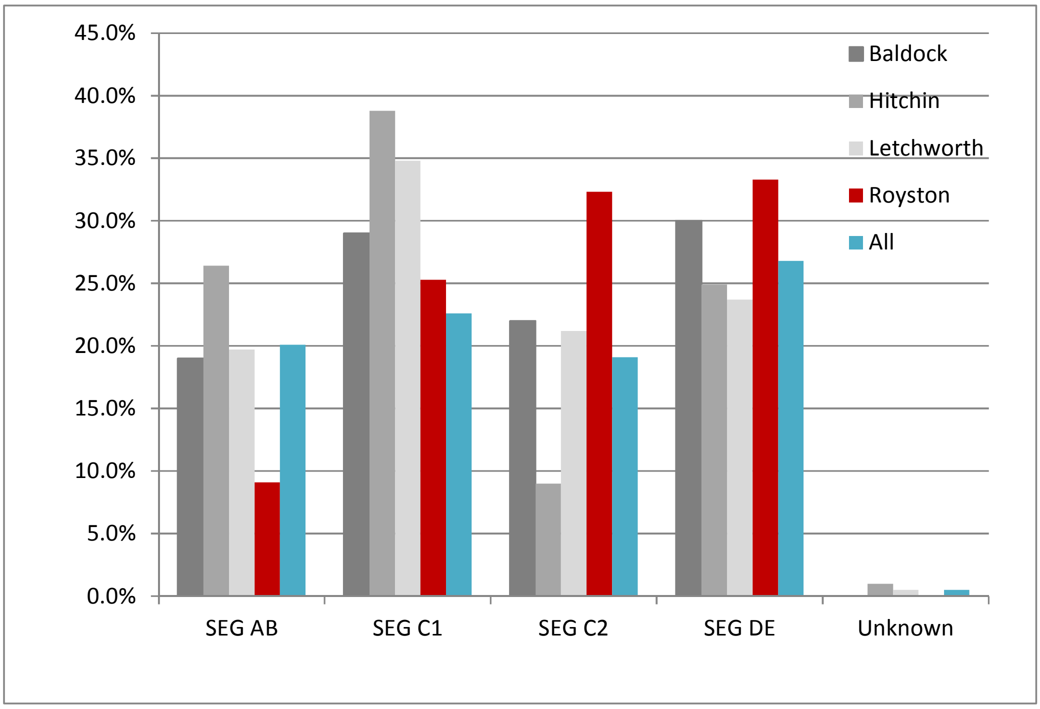
Figure D5 Age Profile of Visitors in Each Centre



Source: NEMS In-Street Survey 2016

Royston's age and socio-economic profiles is much younger that the District average for the four centres, with lower proportions of older visitors over 45 years old. Royston has a lower proportion of the most affluent socio-economic group (A – higher management/professional and B – middle management) and a higher proportion of the less affluent groups (C2 – skilled manual/blue collar, D – semi and un-skilled and E – unemployed, students, pensioners).

Figure D6 Socio-Economic Profile of Visitors



Source: NEMS In-Street Survey 2016

Royston's Strengths

- The centre serves the day to day shopping and service needs of local residents, who visit the centre regularly, including many customers who walk to the centre.
- The Morrison's food store is an important anchor store.
- The centre is accessible by a choice of modes of transport other than the private car. Several car parks are located within and around to the main shopping area.
- The centre has an attractive historic environment with many period buildings. The High Street has attractive paving and there are attractive areas of public realm.
- There is a small but interesting range of small independent specialist retailers.
- Royston Market takes place on Wednesdays and Saturdays, and helps to attract customers to the town centre.

- There are a number of pubs and restaurants that strengthen the evening economy.

Royston's Weaknesses

- Vacant units available n Royston are generally small and may not be attractive to occupied looking for modern premises.
- The centre has a limited number of larger retail units to accommodate national multiple retailers.
- Many of the pavements in the peripheral parts of the centre are narrow which causes congestion and vehicular and pedestrian conflict.
- The train station is a reasonably long walk from the town centre.

Royston's Opportunities

- Royston town centre benefits from a local customer base, and local residents need to travel large distances to reach alternative facilities. Population and expenditure generated by this customer base is expected to grow in the future, which should provide opportunities to improve the range and choice of shops and services in the town.

Royston's Threats

- Royston is an historic town centre with many listed buildings and an extensive conservation area and development opportunities are limited. The existing urban form provides limited opportunities to expand facilities within the town centre. If Royston does not improve its range and choice of facilities the town's role in the hierarchy could diminish.
- Royston town centre is dominated by independent traders. If independent traders close in the future the availability of new occupiers is uncertain and the number of vacant units could increase, which may undermine the vitality and viability of the town centre. However Royston is less vulnerable to national multiple failures e.g. BHS and Austin Reed.

Appendix 6 Household Survey Results

Q01 Which store or shop did you do your household's last main food and grocery shopping ?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Aldi, Biggleswade	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.9%	11	0.0%	0
Aldi, Luton	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	5
Aldi, Stevenage	0.4%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.4%	1	0.0%	0
Asda, Biggleswade	1.4%	14	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	8.2%	13	0.0%	0
Asda, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Monkswood Way, Stevenage	0.4%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.4%	1	0.0%	0
Asda, Queen Street, Hitchin	1.6%	16	7.9%	12	0.0%	0	0.0%	0	0.0%	0	4.7%	5	0.0%	0	0.0%	0
Asda, Wigmore Lane, Luton	4.9%	50	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	26.1%	49
Co-op, Buntingford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.9%	4	0.0%	0	0.0%	0	0.0%	0
Co-op, Stotfold	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	8	0.0%	0
Iceland, Garden Square, Letchworth Garden City	0.5%	5	0.0%	0	0.9%	1	6.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Plinston Retail Park, Letchworth Garden City	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Letchworth Garden City	3.5%	35	2.3%	3	10.7%	17	13.1%	8	1.2%	2	0.0%	0	2.7%	4	0.0%	0
Marks and Spencer Simply Food, Hitchin	0.2%	2	0.8%	1	0.4%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrison's, Baldock Street, Royston	1.2%	12	0.0%	0	0.0%	0	0.0%	0	6.1%	12	0.0%	0	0.0%	0	0.0%	0
Morrison's, Broadway, Letchworth Garden City	7.9%	79	5.8%	9	39.3%	63	2.9%	2	0.0%	0	0.5%	0	3.5%	6	0.0%	0
Morrison's, Welwyn Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.3%	1
Sainsbury's, Biggleswade	1.9%	19	0.0%	0	0.0%	0	3.4%	2	0.4%	1	0.5%	0	9.7%	16	0.0%	0
Sainsbury's, Church Road, Welwyn Garden City	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	5	0.0%	0	4.2%	8
Sainsbury's, Hitchin Road, Stevenage (Coreys Mill)	2.3%	23	4.6%	7	4.3%	7	0.0%	0	0.0%	0	9.1%	9	0.4%	1	0.0%	0
Sainsbury's, Luton	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	4.7%	9
Sainsbury's, Third Avenue, Letchworth Garden City	8.3%	83	9.4%	14	25.4%	41	10.6%	7	5.5%	11	0.0%	0	7.0%	11	0.4%	1
Sainsbury's, Whinbush Road, Hitchin	8.6%	86	41.6%	61	0.0%	0	0.0%	0	0.0%	0	9.6%	9	8.0%	13	1.3%	3
Tesco Express, Royston	1.5%	15	0.0%	0	0.0%	0	0.0%	0	7.7%	15	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Baldock	6.5%	65	0.9%	1	10.8%	17	47.3%	29	1.7%	3	0.0%	0	8.7%	14	0.0%	0
Tesco, Bedford	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco, Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco, Broadwater Retail Park,Stevenage	3.4%	35	1.6%	2	0.0%	0	0.0%	0	0.0%	0	33.2%	32	0.0%	0	0.0%	0
Tesco, Flitwick	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	6	0.0%	0
Tesco, Mount Pleasant, Hatfield	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	5.3%	10
Tesco, Old North Road, Royston	9.6%	96	0.0%	0	0.0%	0	1.1%	1	49.7%	95	0.0%	0	0.0%	0	0.0%	0
Tesco, The Forum, Stevenage	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0
Waitrose, Ampthill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Waitrose, Cambridge	1.5%	15	0.0%	0	0.0%	0	0.0%	0	7.6%	15	0.0%	0	0.0%	0	0.0%	0
Waitrose, Hitchin	5.9%	60	20.1%	30	3.2%	5	3.0%	2	0.5%	1	5.4%	5	5.8%	9	4.1%	8
Waitrose, Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Waitrose, Welwyn Garden City	1.2%	12	0.0%	0	0.0%	0	1.2%	1	0.0%	0	3.9%	4	0.0%	0	4.3%	8
Royston	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Internet	6.7%	68	1.4%	2	3.9%	6	7.9%	5	11.5%	22	13.3%	13	7.7%	12	3.8%	7
Aldi, Parkhouse Court, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Asda, Town Centre, Hatfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Asda, Watton Road, Ware	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, High Street, Melbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Lower Luton Road, Harpenden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Co-op, Southdown Road, Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	1.6%	3
Lidl, Francis Street, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Lidl, Panshanger Aerodrome, Moors Walk, Welwyn Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Local shops, Meldreth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Marks and Spencer BP, Great Cambridge Road, Cheshunt	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, St Peter's Street, St. Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Marks and Spencer, The Howard Centre, Welwyn Garden City	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, The Luton Arndale Centre, Luton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Morrisons, Hatfield Road, St Albans	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	14
Morrisons, High Street, Shefford	3.3%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	21.0%	33	0.0%	0
Sainsbury's Local, High Street, Buntingford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Colney Fields Shopping Park, London Colney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.4%	1
Sainsbury's, High Street, Harpenden	2.3%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	12.1%	23
Sainsbury's, Magpie Crescent, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Sainsbury's, Thorley Neighbourhood Centre, Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Spar, High Street, Bassingbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Wheathampstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Tesco Extra, Mount Pleasant, Oldings Corner, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco Extra, Skimpot Road, Dunstable	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Tesco Metro, St Peters Street, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Waitrose, Canada Place, Canada Square, Canary Wharf	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waitrose, Leyton Road, Harpenden	2.6%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	14.0%	26
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q02 Is there any other store or shop you do your main food and grocery shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Aldi, Biggleswade	1.1%	11	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	6.6%	10	0.0%	0
Aldi, Luton	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	6.1%	11
Aldi, Stevenage	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	4	1.3%	2	0.0%	0
Asda, Biggleswade	1.2%	12	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	6.5%	10	0.0%	0
Asda, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Asda, Monkswood Way, Stevenage	1.9%	19	0.4%	1	0.8%	1	0.0%	0	1.3%	3	8.9%	9	3.6%	6	0.3%	1
Asda, Queen Street, Hitchin	0.3%	3	2.1%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Asda, Wigmore Lane, Luton	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	2.6%	5
Co-op, Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Knebworth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Iceland, Garden Square, Letchworth Garden City	0.4%	4	0.0%	0	0.9%	1	0.0%	0	0.0%	0	1.1%	1	0.7%	1	0.0%	0
Iceland, Hitchin	0.1%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Iceland, Plinston Retail Park, Letchworth Garden City	0.4%	4	0.0%	0	2.1%	3	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lidl, Letchworth Garden City	4.0%	40	3.4%	5	8.1%	13	14.0%	9	2.7%	5	1.1%	1	4.0%	6	0.4%	1
Marks and Spencer Simply Food, Hitchin	1.0%	10	3.7%	5	0.4%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0	1.9%	4
Morrison's M Local, Hitchin	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Morrison's, Baldock Street, Royston	2.4%	24	0.0%	0	0.0%	0	0.0%	0	12.8%	24	0.0%	0	0.0%	0	0.0%	0
Morrison's, Broadway, Letchworth Garden City	4.5%	45	6.9%	10	18.4%	29	3.1%	2	0.0%	0	0.0%	0	2.2%	4	0.0%	0
Morrison's, Welwyn Garden City	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's Local, Eastcheap, Letchworth Garden City	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Biggleswade	0.5%	5	0.0%	0	0.0%	0	3.0%	2	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Sainsbury's, Church Road, Welwyn Garden City	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0	0.7%	1
Sainsbury's, Hitchin Road, Stevenage (Coreys Mill)	2.5%	25	12.2%	18	0.0%	0	0.0%	0	0.4%	1	3.0%	3	1.9%	3	0.0%	0
Sainsbury's, Luton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3
Sainsbury's, Third Avenue, Letchworth Garden City	6.9%	69	6.3%	9	18.9%	30	16.2%	10	3.4%	7	0.0%	0	8.2%	13	0.0%	0
Sainsbury's, Whinbush Road, Hitchin	2.4%	24	10.5%	15	0.0%	0	0.0%	0	0.0%	0	3.5%	3	2.4%	4	0.9%	2
Tesco Express, Royston	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.5%	5	0.6%	1	0.0%	0	0.0%	0
Tesco Express, Southfields Road, Letchworth Garden City	0.4%	4	0.5%	1	2.0%	3	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Tesco Extra, Baldock	5.4%	54	3.4%	5	10.4%	17	30.3%	19	1.2%	2	0.5%	0	6.8%	11	0.0%	0
Tesco, Bedford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	4	0.0%	0
Tesco, Broadwater Retail Park,Stevenage	1.0%	10	0.4%	1	0.0%	0	0.0%	0	0.0%	0	9.3%	9	0.0%	0	0.0%	0
Tesco, Flitwick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco, Mount Pleasant, Hatfield	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	6
Tesco, Old North Road, Royston	3.0%	30	0.0%	0	0.0%	0	2.3%	1	14.9%	29	0.0%	0	0.0%	0	0.0%	0
Tesco, The Forum, Stevenage	0.4%	4	1.7%	3	0.4%	1	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Waitrose, Ampthill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Waitrose, Cambridge	1.6%	16	0.0%	0	0.0%	0	0.0%	0	8.5%	16	0.0%	0	0.0%	0	0.0%	0
Waitrose, Hitchin	3.2%	33	13.4%	20	1.1%	2	0.6%	0	0.6%	1	2.3%	2	4.1%	7	0.3%	1
Waitrose, Stevenage	0.3%	3	0.0%	0	0.0%	0	1.3%	1	0.3%	1	1.5%	1	0.3%	1	0.0%	0
Waitrose, Welwyn Garden City	0.7%	7	0.0%	0	0.4%	1	0.0%	0	0.6%	1	2.6%	2	0.0%	0	1.3%	2
Baldock	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin	0.3%	3	0.7%	1	0.0%	0	1.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Letchworth Garden City	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet	1.9%	19	0.5%	1	0.5%	1	0.0%	0	1.2%	2	4.7%	5	0.3%	1	5.4%	10
Aldi, Church Street, Dunstable	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Aldi, Histon Road, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Aldi, Parkhouse Court, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Aldi, Redbourn Road, Hemel	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Hempstead																
Aldi, St. Marys Lane, Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Asda, Town Centre, Hatfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Budgens, The Quadrant, Marshalswick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Co-op, High Street, Melbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Co-op, Southdown Road, Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3
Iceland, Wigmore Park Centre, Wigmore Lane, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Lidl, Francis Street, Luton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Local shops, Barley	0.6%	6	0.0%	0	0.0%	0	0.0%	0	3.2%	6	0.0%	0	0.0%	0	0.0%	0
Local shops, Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Local shops, Harpenden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Local shops, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Local shops, Meldreth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, South Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer Simply Food, Church Green Parade, Harpenden	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	4
Marks and Spencer, Barnet Road, London Colney	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.6%	1
Marks and Spencer, Market Hill, Cambridge	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, St Peter's Street, St. Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Marks and Spencer, The Howard Centre, Welwyn Garden City	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.3%	1
Marks and Spencer, The Luton Arndale Centre, Luton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Morrisons, Broad Street, Cambourne	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0	0.0%	0	0.0%	0
Morrisons, Hatfield Road, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Morrisons, High Street, Shefford	1.7%	17	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.1%	16	0.0%	0
Morrisons, Stirling Way, Borehamwood	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Sainsbury's, Colney Fields Shopping Park, London Colney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Sainsbury's, Everard Close, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Sainsbury's, High Street, Harpenden	1.3%	13	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.5%	0	0.0%	0	6.3%	12
Sainsbury's, Luton Road, Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Spar, High Street, Bassingbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dunstable Road, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Tesco Express, Fairfield Park, Dickens Boulevard, Stotfold	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, High Street, Wheathampstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.6%	1
Tesco Express, Ivel Road, Shefford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Tesco Extra, Lower High Street, Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Tesco Extra, Mount Pleasant, Oldings Corner, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Tesco Metro, Luton Mall, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Tesco Metro, Turners Hill, Cheshunt	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Leyton Road, Harpenden	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	14.6%	27

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Waitrose, Northgate End, Bishop's Stortford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	1.3%	2	0.0%	0
(Don't know / can't remember)	1.5%	15	1.9%	3	1.9%	3	1.3%	1	0.6%	1	6.7%	6	0.4%	1	0.0%	0
(Nowhere else)	33.8%	339	29.7%	44	31.7%	51	25.0%	15	35.0%	67	40.1%	39	33.0%	53	37.8%	70
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q03 How do you normally travel to do your main food shopping?
Excluding those who do their main food shopping via the Internet at Q01:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car-driver	75.9%	710	66.4%	97	71.4%	110	75.0%	43	78.4%	133	84.6%	71	79.9%	117	78.1%	140
Car-passenger	10.7%	100	12.4%	18	12.1%	19	6.4%	4	8.2%	14	2.9%	2	13.4%	20	13.3%	24
Bus / coach	2.3%	22	1.2%	2	3.2%	5	1.2%	1	0.7%	1	1.2%	1	4.3%	6	3.4%	6
Train	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Taxi	1.0%	9	4.9%	7	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Walk	6.5%	60	14.6%	21	12.3%	19	9.2%	5	3.8%	6	0.0%	0	2.1%	3	3.0%	5
Bicycle	0.4%	4	0.4%	1	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.3%	1
Disability vehicle (scooter, wheelchair etc.)	0.5%	4	0.0%	0	0.0%	0	7.0%	4	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Use internet / get it delivered	1.3%	12	0.0%	0	0.0%	0	0.0%	0	4.9%	8	2.4%	2	0.0%	0	0.8%	1
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	1.4%	13	0.0%	0	0.5%	1	1.2%	1	2.1%	4	9.0%	8	0.0%	0	0.4%	1
Weighted base:		935		145		154		57		170		84		147		179
Sample:		950		138		144		94		169		91		141		173

Q04 In addition to your main food shopping at which store or shop did you last visit for small scale / top-up shopping for things like bread, milk or newspapers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Aldi, Biggleswade	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Asda, Biggleswade	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0
Asda, Monkswood Way, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Asda, Queen Street, Hitchin	1.7%	17	10.7%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Asda, Wigmore Lane, Luton	2.2%	22	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	10.9%	20
Co-op, Buntingford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.5%	7	0.0%	0	0.0%	0	0.0%	0
Co-op, Knebworth	2.7%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	28.0%	27	0.0%	0	0.0%	0
Co-op, Stotfold	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	8	0.0%	0
Iceland, Garden Square, Letchworth Garden City	0.7%	7	0.0%	0	1.3%	2	6.4%	4	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Iceland, Hitchin	0.4%	4	0.8%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.3%	1
Lidl, Letchworth Garden City	2.1%	21	0.4%	1	11.3%	18	2.2%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Marks and Spencer Simply Food, Hitchin	1.8%	18	9.0%	13	0.8%	1	0.7%	0	0.0%	0	1.0%	1	0.8%	1	0.6%	1
Morrison's, Baldock Street, Royston	2.7%	27	0.0%	0	0.0%	0	0.0%	0	14.4%	27	0.0%	0	0.0%	0	0.0%	0
Morrison's, Broadway, Letchworth Garden City	4.0%	40	0.4%	1	23.4%	37	1.2%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Sainsbury's Local, Eastcheap, Letchworth Garden City	0.5%	5	0.0%	0	3.3%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Biggleswade	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0
Sainsbury's, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Hitchin Road, Stevenage (Coreys Mill)	1.0%	10	2.8%	4	0.0%	0	0.0%	0	0.0%	0	3.9%	4	1.3%	2	0.0%	0
Sainsbury's, Third Avenue, Letchworth Garden City	3.3%	33	3.7%	5	14.4%	23	1.1%	1	0.9%	2	0.0%	0	1.3%	2	0.0%	0
Sainsbury's, Whinbush Road, Hitchin	3.5%	35	14.4%	21	1.2%	2	0.0%	0	0.0%	0	3.1%	3	5.6%	9	0.0%	0
Tesco Express, Bedford Road, Letchworth Garden City	0.8%	8	0.0%	0	5.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Hitchin	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Royston	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.6%	7	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Shelford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Tesco Express, Southfields Road, Letchworth Garden City	0.5%	5	0.0%	0	3.2%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Tesco Extra, Baldock	3.2%	32	0.8%	1	2.1%	3	38.3%	24	1.3%	2	0.0%	0	0.8%	1	0.0%	0
Tesco, Bedford	0.4%	4	0.0%	0	0.0%	0	0.6%	0	1.2%	2	0.0%	0	0.4%	1	0.6%	1
Tesco, Broadwater Retail Park,Stevenage	0.4%	4	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.7%	4	0.0%	0	0.0%	0
Tesco, Mount Pleasant, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Tesco, Old North Road, Royston	2.1%	21	0.0%	0	0.0%	0	2.4%	1	10.0%	19	0.0%	0	0.0%	0	0.0%	0
Waitrose, Hitchin	4.3%	44	20.8%	31	2.3%	4	0.0%	0	0.0%	0	2.2%	2	1.9%	3	2.2%	4
Waitrose, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Waitrose, Welwyn Garden City	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.6%	1
Baldock	0.9%	9	0.0%	0	0.4%	1	14.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin	3.1%	31	15.3%	23	0.0%	0	0.0%	0	0.0%	0	8.0%	8	0.0%	0	0.3%	1
Letchworth Garden City	1.1%	11	0.0%	0	6.8%	11	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royston	1.6%	16	0.0%	0	0.0%	0	0.0%	0	8.6%	16	0.0%	0	0.0%	0	0.0%	0
Internet	0.4%	4	0.4%	1	0.0%	0	0.7%	0	0.0%	0	2.0%	2	0.4%	1	0.3%	1
Aldi, St. Marys Lane, Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Budgens, Printers Avenue, off Whippendell Road, Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Budgens, The Quadrant, Marshalswick	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2
Budgens, Whitehorse Lane, Old Town, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Co-op, Bedford Road, Barton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Co-op, High Street, Central and Eastern, Great Shelford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Co-op, High Street, Melbourn	1.3%	13	0.0%	0	0.0%	0	0.0%	0	7.0%	13	0.0%	0	0.0%	0	0.0%	0
Co-op, Hitchin Road, Stopsley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Co-op, Lower Luton Road, Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.5%	3
Co-op, Southdown Road, Harpenden	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	5
Co-op, Wigmore Lane, Luton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3
Days of Ashwell, High Street, Buntingford	0.4%	4	0.0%	0	0.0%	0	1.2%	1	1.9%	4	0.0%	0	0.0%	0	0.0%	0
Delivered by milkman	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Farmfoods, Park Street, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Iceland, Wigmore Park Centre, Wigmore Lane, Luton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	4
Local shops, Arlesey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Local shops, Ashwell	0.7%	7	0.0%	0	0.0%	0	11.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Barley	0.9%	9	0.0%	0	0.0%	0	0.0%	0	4.8%	9	0.0%	0	0.0%	0	0.0%	0
Local shops, Bedford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Local shops, Buntingford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Caldecote	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Local shops, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Clifton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0
Local shops, Clothall Common	0.1%	1	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Codicote	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.2%	3	0.0%	0	0.0%	0
Local shops, Datchworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0
Local shops, Foxton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Gosmore	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Local shops, Guilden Morden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Harpenden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	2
Local shops, Henlow	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Local shops, Ickleford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Local shops, Kimpton	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	4	0.0%	0	0.0%	0
Local shops, Knebworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Local shops, Litlington	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Lower Stondon	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Local shops, Melbourn	0.6%	6	0.0%	0	0.0%	0	0.0%	0	3.0%	6	0.0%	0	0.0%	0	0.0%	0
Local shops, Meldreth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Local shops, Meppershall	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Local shops, Mickleover	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Local shops, Offley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Local shops, Orwell	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.4%	3	0.0%	0	0.0%	0	0.0%	0
Local shops, Puckeridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Purton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Local shops, Radwell	0.1%	1	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Saffron Walden	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	5.3%	8	0.0%	0
Local shops, Shefford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Local shops, Shillington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Local shops, St Ippolyts	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Local shops, Steeple Morden	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Local shops, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0	0.0%	0
Local shops, Stopsley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Local shops, Stotfold	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.0%	0
Local shops, Sundridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Local shops, Thriplow	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.6%	7	0.0%	0	0.0%	0	0.0%	0
Local shops, Welwyn Garden City	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Local shops, Weston	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	7	0.0%	0	0.0%	0
Local shops, Wheathampstead	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	5
Local shops, Whitwell	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Marks and Spencer BP, Welwyn Bypass, Welwyn	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Marks and Spencer Simply Food, Church Green Parade, Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3
Marks and Spencer, High Street, Rickmansworth	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, Junction	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
10, Radwell																
Marks and Spencer, Market Hill, Cambridge	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Marks and Spencer, St Peter's Street, St. Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Marks and Spencer, The Luton Arndale Centre, Luton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Morrisons, High Street, Shefford	3.7%	37	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.4%	37	0.0%	0
Morrisons, Lake Street, Leighton Buzzard	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	6	0.0%	0
Sainsbury's Local, High Street, Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sainsbury's, Everard Close, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.3%	1
Sainsbury's, High Street, Harpenden	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	5.5%	10
Spar, High Street, Bassingbourn	0.9%	9	0.0%	0	0.0%	0	0.0%	0	4.5%	9	0.0%	0	0.0%	0	0.0%	0
Tesco Express, Dickens Boulevd, Fairfield Park, Stotfold	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Tesco Express, High Street, Welwyn Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0
Tesco Express, High Street, Wheathampstead	2.5%	25	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.2%	25
Tesco Express, Hitchin Road, Stopsley	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	10
Tesco Express, Ivel Road, Shefford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4	0.0%	0
Tesco Express, Lower Luton Road, Batford	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.2%	12
Tesco Express, Moors Walk, Welwyn Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Tesco Metro, Luton Mall, Luton	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Waitrose, Concourse, Kings Cross Station, London	0.4%	4	0.0%	0	1.5%	2	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Waitrose, Leyton Road, Harpenden	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.6%	10
(Don’t know / can't remember)	1.6%	16	0.4%	1	0.8%	1	4.2%	3	1.3%	3	0.0%	0	4.2%	7	1.5%	3
(Don't do top-up shopping)	20.1%	202	17.9%	26	21.0%	34	10.2%	6	19.3%	37	15.5%	15	22.2%	35	25.7%	48
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q05 In which town or location do you buy most of your household's non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	1.2%	12	0.0%	0	0.0%	0	12.8%	8	1.9%	4	0.5%	0	0.3%	1	0.0%	0
Bedford	1.6%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	17	0.0%	0
Biggleswade	2.0%	20	0.4%	1	0.8%	1	7.6%	5	0.9%	2	0.0%	0	7.7%	12	0.0%	0
Bishop's Stortford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	12.2%	123	1.2%	2	3.6%	6	9.4%	6	55.8%	107	0.6%	1	1.2%	2	0.0%	0
Central London	1.4%	14	4.5%	7	0.0%	0	0.6%	0	0.0%	0	2.1%	2	0.7%	1	1.8%	3
Harpenden	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	9
Hatfield	0.3%	3	0.5%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	2
Hitchin	15.1%	151	44.1%	65	10.7%	17	9.3%	6	0.9%	2	19.0%	18	21.9%	35	4.4%	8
Letchworth Garden City	10.6%	106	5.7%	8	39.5%	63	21.1%	13	2.8%	5	0.6%	1	9.5%	15	0.3%	1
Luton	5.6%	56	0.9%	1	0.8%	1	0.0%	0	0.0%	0	1.3%	1	0.3%	1	27.6%	51
Milton Keynes	3.3%	33	0.4%	1	1.5%	2	0.0%	0	0.4%	1	0.0%	0	12.8%	20	4.5%	8
Royston	4.5%	45	0.0%	0	0.0%	0	0.6%	0	23.5%	45	0.0%	0	0.0%	0	0.0%	0
St Albans	4.4%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	23.0%	43
Stevenage	14.4%	145	19.6%	29	21.9%	35	12.9%	8	3.6%	7	27.8%	27	22.7%	36	1.5%	3
Watford	0.3%	3	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Welwyn Garden City	9.3%	93	7.2%	11	9.4%	15	11.1%	7	0.0%	0	25.2%	24	2.4%	4	17.4%	32
The Galleria, Hatfield	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	6.2%	62	4.8%	7	6.9%	11	6.0%	4	6.1%	12	6.7%	6	3.5%	6	8.7%	16
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Ashwell	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Basingstoke	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	0.0%	0	0.0%	0
Bassingbourn cum Kneesworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Broadwater Retail Park, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Brookfield Retail Park, Cheshunt	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Derby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Huntingdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Leeds	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	0.4%	4	0.4%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Roaring Meg Retail Park, Stevenage	0.8%	8	2.8%	4	0.0%	0	0.0%	0	0.0%	0	4.2%	4	0.0%	0	0.0%	0
Stansted	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thetford, Norfolk	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Trumpington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Wheathampstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(Don't know / varies)	3.7%	37	5.5%	8	3.6%	6	5.6%	3	0.9%	2	3.7%	4	5.9%	9	2.6%	5
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q06 How do you normally travel to do your non-food shopping?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Car-driver	68.8%	690	52.6%	78	55.9%	89	72.2%	44	78.4%	150	78.7%	76	76.8%	122	69.8%	130
Car-passenger	6.6%	67	9.3%	14	8.5%	14	7.0%	4	6.4%	12	1.6%	2	7.5%	12	4.9%	9
Bus / coach	4.6%	46	2.8%	4	5.2%	8	2.3%	1	1.5%	3	3.6%	3	6.5%	10	8.4%	16
Train	3.6%	36	5.6%	8	6.9%	11	1.8%	1	1.4%	3	1.6%	2	0.7%	1	5.6%	10
Taxi	0.7%	7	4.9%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Walk	6.9%	70	17.0%	25	15.4%	25	1.8%	1	2.3%	4	5.7%	6	0.0%	0	4.7%	9
Bicycle	0.6%	6	0.0%	0	0.4%	1	0.0%	0	1.5%	3	2.0%	2	0.0%	0	0.3%	1
Disability vehicle (scooter, wheelchair etc.)	0.5%	5	0.0%	0	0.0%	0	6.4%	4	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Use internet / get it delivered	4.9%	49	5.6%	8	3.4%	5	7.2%	4	5.8%	11	4.6%	4	3.5%	6	5.3%	10
Other	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Park & Ride	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
(Don’t know / varies)	2.6%	26	2.3%	3	4.3%	7	1.1%	1	1.6%	3	2.0%	2	4.9%	8	1.0%	2
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q07 At which town or location did your household last buy clothes or shoes?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.5%	5	0.4%	1	2.2%	4	1.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Bedford	1.8%	18	0.9%	1	0.4%	1	1.2%	1	0.0%	0	0.0%	0	9.7%	16	0.0%	0
Biggleswade	2.1%	21	0.4%	1	2.7%	4	11.2%	7	1.8%	3	1.1%	1	3.2%	5	0.0%	0
Bishop's Stortford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Cambridge	14.8%	148	7.4%	11	9.6%	15	11.5%	7	57.2%	110	0.6%	1	2.9%	5	0.0%	0
Central London	3.9%	39	5.6%	8	5.1%	8	2.0%	1	1.0%	2	3.6%	4	5.1%	8	4.1%	8
Harpenden	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4
Hatfield	1.5%	15	0.7%	1	4.3%	7	2.4%	1	0.0%	0	1.1%	1	0.0%	0	2.2%	4
Hemel Hempstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Hitchin	8.3%	83	20.1%	30	7.5%	12	3.4%	2	0.3%	1	12.4%	12	13.6%	22	3.0%	6
Letchworth Garden City	5.8%	58	4.5%	7	22.4%	36	11.3%	7	2.2%	4	0.0%	0	2.7%	4	0.0%	0
Luton	7.0%	70	5.7%	8	1.9%	3	0.0%	0	0.0%	0	3.3%	3	3.6%	6	26.6%	49
Milton Keynes	4.4%	44	3.3%	5	3.1%	5	1.4%	1	0.0%	0	1.1%	1	16.6%	26	3.3%	6
Royston	1.7%	17	0.0%	0	0.0%	0	0.6%	0	8.7%	17	0.0%	0	0.0%	0	0.0%	0
St Albans	2.4%	24	0.4%	1	0.4%	1	0.0%	0	0.0%	0	2.7%	3	0.0%	0	10.8%	20
Stevenage	11.0%	110	19.5%	29	16.3%	26	12.3%	8	4.0%	8	13.1%	13	17.1%	27	0.3%	1
Watford	0.4%	4	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Welwyn Garden City	9.7%	97	7.5%	11	6.4%	10	6.1%	4	1.5%	3	26.4%	26	6.7%	11	17.9%	33
Bluewater	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Lakeside, Thurrock	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
The Galleria, Hatfield	0.7%	7	0.5%	1	0.8%	1	2.0%	1	0.4%	1	2.0%	2	0.0%	0	0.6%	1
Internet / mail order / catalogue	12.7%	128	10.0%	15	14.3%	23	26.6%	16	12.9%	25	10.3%	10	8.7%	14	13.5%	25
Abroad	1.2%	12	0.9%	1	0.0%	0	0.6%	0	0.0%	0	5.7%	6	2.3%	4	0.6%	1
Birmingham	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	1.0%	2
Brent Cross Shopping Centre	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Broadwater Retail Park, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Bury St. Edmunds	0.1%	1	0.0%	0	0.5%	1	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge Retail Park, Newmarket Road, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Canterbury	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Cardiff	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cheshunt	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Colney Fields, London Colney	1.0%	10	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.9%	9
Coney Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Crawley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Darlington	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Droitwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Edinburgh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Grantham, Lincolnshire	0.1%	1	0.0%	0	0.4%	1	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hereford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Leeds	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leicester	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	1.6%	16	2.0%	3	0.5%	1	0.6%	0	0.3%	1	1.6%	2	1.6%	3	3.9%	7
Manchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Oakham	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Peterborough	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Selby	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Shefford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
St Neots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Thetford, Norfolk	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Upminster	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Wheathampstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Wigmore	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Don't know / varies)	1.4%	14	0.8%	1	0.4%	1	0.0%	0	0.9%	2	7.3%	7	0.4%	1	1.5%	3
(Don't regularly buy these kind of goods)	2.3%	23	5.2%	8	0.4%	1	3.5%	2	1.2%	2	1.0%	1	4.0%	6	1.5%	3
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Column %ges.

Q08 Is there any other town or location you buy clothes or shoes?
Those who buy clothes and shoes at a specific location at Q07:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.4%	4	0.0%	0	0.4%	1	5.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	1.6%	15	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	8.9%	14	0.0%	0
Biggleswade	2.9%	28	0.9%	1	2.5%	4	8.6%	5	0.3%	1	0.0%	0	11.3%	17	0.0%	0
Bishop's Stortford	0.8%	8	0.0%	0	0.0%	0	0.0%	0	3.9%	7	0.6%	0	0.0%	0	0.0%	0
Cambridge	7.3%	70	7.5%	10	7.0%	11	13.2%	8	15.0%	28	10.5%	9	2.2%	3	0.0%	0
Central London	4.3%	42	4.4%	6	2.7%	4	3.6%	2	7.9%	15	2.5%	2	2.8%	4	4.3%	8
Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3
Hatfield	0.3%	3	0.0%	0	0.7%	1	0.6%	0	0.4%	1	0.0%	0	0.0%	0	0.7%	1
Hemel Hempstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Hitchin	5.6%	54	12.4%	17	11.3%	18	1.2%	1	0.4%	1	2.2%	2	7.0%	11	2.6%	5
Letchworth Garden City	2.6%	25	3.6%	5	6.6%	10	2.8%	2	2.2%	4	0.6%	0	2.4%	4	0.0%	0
Luton	2.5%	24	2.3%	3	1.4%	2	0.0%	0	0.6%	1	1.2%	1	1.6%	2	7.8%	14
Milton Keynes	5.8%	56	10.1%	14	0.9%	1	2.7%	2	0.7%	1	3.5%	3	12.0%	18	9.2%	17
Royston	1.3%	13	0.0%	0	0.0%	0	0.7%	0	6.5%	12	0.0%	0	0.0%	0	0.0%	0
St Albans	1.2%	12	0.4%	1	0.4%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	5.4%	10
Stevenage	12.5%	121	13.0%	18	21.5%	34	11.0%	7	14.4%	27	21.5%	19	10.0%	15	0.3%	1
Watford	0.5%	5	0.0%	0	0.5%	1	0.0%	0	0.0%	0	2.2%	2	0.0%	0	1.0%	2
Welwyn Garden City	7.7%	74	7.6%	11	9.5%	15	11.3%	7	1.4%	3	14.4%	13	2.8%	4	12.4%	22
Bluewater	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Lakeside, Thurrock	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.4%	1	0.0%	0
The Galleria, Hatfield	1.1%	11	0.9%	1	0.5%	1	0.7%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	8
Internet / mail order / catalogue	4.2%	41	2.3%	3	5.6%	9	6.0%	4	2.2%	4	4.6%	4	7.7%	12	3.1%	6
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Basingstoke	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.3%	6	0.0%	0	0.0%	0
Bicester	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bournemouth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Braintree	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Brent Cross Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.3%	1
Brookfield Retail Park, Cheshunt	0.4%	4	0.0%	0	0.0%	0	0.0%	0	1.3%	2	1.7%	2	0.0%	0	0.0%	0
Bury St. Edmunds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cheshunt	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Colney Fields, London Colney	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dorchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Edinburgh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Haverhill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Huntingdon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Leeds	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	1.0%	9	0.8%	1	0.0%	0	0.6%	0	0.0%	0	3.0%	3	0.7%	1	2.3%	4
Melbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Norwich	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Peterborough	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
St Johns Retail Park, Bedford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Stratford-upon-Avon	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.1%	20	3.8%	5	1.5%	2	3.6%	2	2.2%	4	1.2%	1	1.4%	2	1.6%	3
(Nowhere else)	30.3%	293	28.7%	40	24.0%	38	26.8%	16	33.2%	62	22.4%	20	27.7%	42	41.2%	74
Weighted base:		966		139		159		59		188		89		152		181
Sample:		965		128		148		95		177		94		149		174

Column %ges.

Q09 At which town or location did your household last buy domestic electric appliances (e.g. fridges and kitchen items)?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	1.4%	14	1.2%	2	2.0%	3	10.0%	6	0.9%	2	0.0%	0	0.8%	1	0.0%	0
Bedford	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0
Biggleswade	0.5%	5	0.0%	0	0.0%	0	0.6%	0	1.2%	2	0.0%	0	1.5%	2	0.0%	0
Cambridge	5.2%	53	0.5%	1	4.7%	8	5.7%	4	21.0%	40	0.0%	0	0.3%	1	0.0%	0
Central London	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Harpenden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.6%	1
Hatfield	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Hitchin	2.9%	29	11.3%	17	0.4%	1	0.0%	0	0.3%	1	0.5%	0	6.0%	10	0.7%	1
Letchworth Garden City	3.8%	39	1.8%	3	15.0%	24	7.3%	4	0.3%	1	0.0%	0	4.4%	7	0.0%	0
Luton	4.0%	40	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.6%	1	0.4%	1	20.1%	37
Milton Keynes	0.7%	7	0.4%	1	0.0%	0	1.4%	1	0.0%	0	0.0%	0	2.0%	3	1.3%	2
Royston	1.1%	11	0.0%	0	0.0%	0	0.6%	0	5.4%	10	0.0%	0	0.0%	0	0.0%	0
St Albans	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.9%	5
Stevenage	9.6%	96	12.9%	19	14.3%	23	6.0%	4	8.2%	16	16.2%	16	10.9%	17	1.1%	2
Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Welwyn Garden City	13.5%	135	19.6%	29	9.9%	16	10.2%	6	1.3%	2	16.7%	16	5.7%	9	30.4%	57
The Galleria, Hatfield	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Internet / mail order / catalogue	27.7%	278	19.9%	29	18.4%	29	38.9%	24	41.6%	80	30.2%	29	34.3%	55	17.2%	32
Brent Cross Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Cambridge Retail Park, Newmarket Road, Cambridge	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.6%	5	0.0%	0	0.0%	0	0.0%	0
Hoddesdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	9.4%	94	16.5%	24	14.3%	23	11.4%	7	5.9%	11	16.8%	16	5.6%	9	1.6%	3
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.3%	1
Shefford	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
St Johns Retail Park, Bedford	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	3.4%	6
Stotfold	0.2%	2	0.4%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Thetford, Norfolk	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wincanton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(Don't know / varies)	3.9%	39	2.9%	4	8.2%	13	0.0%	0	1.5%	3	1.5%	1	7.7%	12	2.8%	5
(Don't regularly buy these kind of goods)	12.3%	123	11.8%	17	11.5%	18	6.0%	4	8.1%	16	16.9%	16	14.9%	24	15.1%	28
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Column %ges.

Q10 Is there any other town or location you buy domestic electric appliances?

Those who buy domestic electrical appliances at a specific location at Q09:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.3%	3	0.0%	0	1.4%	2	1.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	6	0.0%	0
Biggleswade	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.6%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	4.5%	38	0.9%	1	0.6%	1	2.0%	1	20.3%	35	0.0%	0	0.0%	0	0.0%	0
Central London	1.4%	11	0.0%	0	0.0%	0	6.9%	4	0.3%	1	0.6%	0	0.0%	0	4.1%	6
Hitchin	0.6%	5	3.0%	4	0.5%	1	0.6%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Letchworth Garden City	3.8%	32	2.4%	3	15.2%	20	4.7%	3	0.0%	0	0.0%	0	5.6%	7	0.0%	0
Luton	2.5%	21	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.8%	21
Milton Keynes	1.1%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	5	2.4%	4
Royston	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
St Albans	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4
Stevenage	5.2%	44	7.3%	9	5.4%	7	4.9%	3	5.3%	9	3.7%	3	7.7%	9	2.3%	4
Watford	0.3%	2	0.0%	0	0.6%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.4%	1
Welwyn Garden City	4.3%	36	3.5%	4	2.0%	3	3.1%	2	1.4%	2	13.9%	11	2.7%	3	7.1%	11
Internet / mail order / catalogue	8.8%	74	4.3%	5	12.4%	16	6.6%	4	10.9%	19	6.3%	5	11.3%	14	7.1%	11
Brent Cross Shopping Centre	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Cambridge Retail Park, Newmarket Road, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0
Cheshunt	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Leicester	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	4.0%	34	5.5%	7	4.8%	6	3.2%	2	6.1%	11	8.3%	7	1.4%	2	0.0%	0
St Johns Retail Park, Bedford	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	6	0.0%	0
Stotfold	0.4%	3	0.0%	0	1.5%	2	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.1%	26	2.6%	3	0.6%	1	3.7%	2	2.8%	5	5.1%	4	1.4%	2	6.0%	9
(Nowhere else)	56.4%	474	70.5%	89	54.7%	70	58.9%	34	48.9%	85	59.3%	47	55.7%	69	52.8%	81
Weighted base:		841		126		129		58		173		79		123		153
Sample:		859		121		127		91		161		86		126		147

Q11 At which town or location did your household last buy other kinds of electric goods such as TV / Hi-Fi and computers?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	3.9%	39	0.8%	1	12.2%	20	21.0%	13	1.5%	3	1.1%	1	1.0%	2	0.0%	0
Bedford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	7	0.0%	0
Biggleswade	0.2%	2	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Cambridge	6.3%	64	1.2%	2	0.8%	1	4.7%	3	30.1%	58	0.0%	0	0.0%	0	0.0%	0
Central London	0.8%	8	1.6%	2	0.0%	0	3.5%	2	0.0%	0	0.6%	1	2.0%	3	0.0%	0
Hatfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Hitchin	1.7%	17	5.4%	8	0.4%	1	0.0%	0	0.0%	0	2.7%	3	2.0%	3	1.2%	2
Letchworth Garden City	3.7%	37	0.8%	1	11.0%	18	9.5%	6	0.3%	1	0.0%	0	7.6%	12	0.0%	0
Luton	3.4%	34	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	17.9%	33
Milton Keynes	2.1%	22	2.8%	4	0.0%	0	0.6%	0	0.0%	0	0.0%	0	7.1%	11	3.1%	6
Royston	1.8%	18	0.0%	0	0.0%	0	0.0%	0	9.4%	18	0.0%	0	0.0%	0	0.0%	0
St Albans	1.2%	12	0.0%	0	0.5%	1	0.0%	0	0.0%	0	2.0%	2	0.0%	0	4.8%	9
Stevenage	12.3%	123	13.1%	19	17.9%	29	9.4%	6	9.4%	18	25.2%	24	14.3%	23	2.2%	4
Watford	0.3%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	1.0%	2
Welwyn Garden City	13.3%	134	20.3%	30	7.8%	13	9.1%	6	1.5%	3	22.6%	22	3.2%	5	30.1%	56
Internet / mail order / catalogue	21.9%	220	20.2%	30	22.3%	36	13.1%	8	28.9%	55	13.7%	13	24.8%	40	20.6%	38
Bar Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Brent Cross Shopping Centre	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4	0.6%	1
Cambridge Retail Park, Newmarket Road, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	3	0.0%	0	0.0%	0	0.0%	0
Codicote	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Dunstable	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.6%	1
Enfield	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.1%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Leeds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
London Colney	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	10.8%	108	15.8%	23	14.5%	23	11.6%	7	4.7%	9	21.9%	21	13.6%	22	1.3%	2
Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Shefford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
St Johns Retail Park, Bedford	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.8%	8	0.6%	1
St Neots	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.8%	28	3.8%	6	4.8%	8	5.7%	4	2.5%	5	2.0%	2	1.7%	3	0.9%	2
(Don't regularly buy these kind of goods)	9.9%	100	12.6%	19	7.9%	13	10.7%	7	8.4%	16	5.6%	5	8.7%	14	14.2%	26
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q12 Is there any other town or location you buy other kinds of electric goods?
Those who buy other kinds of electrical goods at a specific location at Q11:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.9%	7	0.0%	0	1.4%	2	4.3%	2	0.7%	1	0.0%	0	1.4%	2	0.0%	0
Bedford	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	7	0.0%	0
Biggleswade	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.4%	1	0.0%	0
Cambridge	3.0%	26	0.5%	1	0.4%	1	5.0%	3	13.2%	23	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.6%	0	0.0%	0	0.4%	1
Hatfield	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Hemel Hempstead	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Hitchin	1.5%	13	2.9%	4	0.4%	1	0.7%	0	0.0%	0	8.4%	8	0.8%	1	0.0%	0
Letchworth Garden City	2.5%	22	0.5%	1	10.8%	15	1.4%	1	0.3%	1	2.2%	2	1.9%	3	0.0%	0
Luton	2.7%	24	0.6%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	4.8%	7	9.9%	16
Milton Keynes	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	1.9%	3	1.2%	2
Royston	0.7%	6	0.0%	0	0.0%	0	0.0%	0	3.6%	6	0.0%	0	0.0%	0	0.0%	0
St Albans	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	1.1%	2
Stevenage	3.4%	30	0.0%	0	7.7%	11	9.9%	5	1.9%	3	1.2%	1	6.4%	9	0.4%	1
Watford	0.5%	5	2.5%	3	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.4%	1
Welwyn Garden City	4.2%	36	0.9%	1	3.7%	5	6.3%	3	1.1%	2	8.3%	7	1.6%	2	9.6%	15
Internet / mail order / catalogue	12.0%	105	10.0%	12	8.8%	12	5.4%	3	14.7%	25	19.1%	17	12.6%	18	10.9%	17
Brent Cross Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Cambridge Retail Park, Newmarket Road, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0
Cheshunt	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	3.8%	34	6.1%	7	2.5%	4	4.4%	2	4.6%	8	7.5%	7	3.7%	5	0.4%	1
St Johns Retail Park, Bedford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
(Don't know / varies)	2.3%	20	2.5%	3	4.1%	6	2.1%	1	1.7%	3	2.2%	2	2.1%	3	1.8%	3
(Nowhere else)	59.5%	521	73.1%	90	59.5%	83	60.5%	31	55.3%	94	47.6%	43	57.0%	81	62.1%	98
Weighted base:		876		123		140		51		171		89		143		158
Sample:		851		118		125		80		156		88		136		148

Q13 Which town or location did your household last buy furniture, soft furnishings or floor-coverings?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.3%	3	0.0%	0	0.0%	0	5.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	2.2%	22	2.1%	3	1.2%	2	1.3%	1	0.0%	0	0.0%	0	9.9%	16	0.0%	0
Biggleswade	1.7%	17	1.3%	2	2.0%	3	0.7%	0	2.2%	4	0.5%	0	4.1%	7	0.0%	0
Bishop's Stortford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.2%	6	0.5%	0	0.4%	1	0.0%	0
Buntingford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Cambridge	5.8%	58	0.4%	1	0.0%	0	7.0%	4	26.9%	52	0.0%	0	0.8%	1	0.0%	0
Central London	1.3%	13	2.4%	4	0.0%	0	0.0%	0	0.7%	1	2.2%	2	0.3%	1	2.9%	5
Harpenden	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	4
Hatfield	0.4%	4	0.4%	1	0.8%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.9%	2
Hemel Hempstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.6%	1
Hertford	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Hitchin	3.3%	33	13.1%	19	2.4%	4	2.4%	1	0.0%	0	1.0%	1	3.0%	5	1.7%	3
Letchworth Garden City	5.8%	58	2.0%	3	23.0%	37	12.2%	8	0.6%	1	1.1%	1	4.6%	7	0.6%	1
Luton	3.4%	34	0.8%	1	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.3%	1	16.6%	31
Milton Keynes	4.2%	43	7.3%	11	2.9%	5	5.3%	3	1.2%	2	2.0%	2	10.7%	17	1.4%	3
Royston	1.4%	14	0.0%	0	0.0%	0	0.0%	0	7.3%	14	0.0%	0	0.0%	0	0.0%	0
St Albans	1.1%	11	0.0%	0	0.4%	1	0.0%	0	0.0%	0	1.1%	1	1.3%	2	3.7%	7
Stevenage	8.1%	82	8.7%	13	11.5%	18	3.7%	2	7.6%	15	11.1%	11	9.4%	15	4.1%	8
Watford	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	4.8%	9
Welwyn Garden City	8.3%	83	8.4%	12	8.0%	13	1.1%	1	3.2%	6	10.2%	10	2.4%	4	19.9%	37
Bluewater	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Lakeside, Thurrock	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	0.0%	0	0.0%	0
Internet / mail order / catalogue	9.0%	91	8.2%	12	8.1%	13	11.3%	7	9.3%	18	10.2%	10	14.4%	23	4.3%	8
Arlesey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Basingstoke	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.7%	6	0.0%	0	0.0%	0
Berkhamsted	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Brent Cross Shopping Centre	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Bridport, Dorset	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Bury St. Edmunds	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.0%	0	0.0%	0	0.0%	0
Cambridge Retail Park, Newmarket Road, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0
Dunstable	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	8
East Harlsey, Yorkshire	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Enfield	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Gamlingay	0.4%	4	0.4%	1	0.8%	1	1.1%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Harlow, Essex	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Henlow	0.3%	3	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.4%	1	0.0%	0
Knebworth	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0
Leicester	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
London Colney	0.4%	4	0.0%	0	0.0%	0	0.6%	0	0.4%	1	1.1%	1	0.3%	1	0.9%	2
Marshalswick	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Melbourn	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.5%	7	0.0%	0	0.0%	0	0.0%	0
Newport	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Norwich	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Nottingham	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	5.8%	59	4.6%	7	11.7%	19	12.0%	7	1.3%	2	16.1%	16	4.1%	6	0.6%	1
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Shefford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
St Johns Retail Park, Bedford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
St Neots	0.2%	2	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thetford, Norfolk	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Abbey	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Waltham Cross	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.6%	1	4.2%	4	0.0%	0	0.3%	1
(Don't know / varies)	6.9%	69	6.8%	10	9.3%	15	6.2%	4	3.8%	7	7.3%	7	11.8%	19	3.6%	7
(Don't regularly buy these kind of goods)	20.9%	210	28.2%	42	16.1%	26	29.2%	18	19.5%	37	11.5%	11	18.2%	29	25.1%	47
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q14 Is there any other town or location you buy furniture, soft furnishings or floor-coverings?
Those who buy furniture, soft furnishings or floor-coverings at a specific location at Q13:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	1.3%	10	0.0%	0	1.1%	1	0.0%	0	0.0%	0	2.5%	2	4.7%	5	0.9%	1
Biggleswade	0.4%	3	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	5.3%	39	0.0%	0	6.3%	7	4.6%	2	19.3%	28	1.3%	1	0.0%	0	0.0%	0
Central London	1.4%	10	0.0%	0	6.3%	8	2.0%	1	0.0%	0	0.0%	0	0.5%	1	0.9%	1
Harpenden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.5%	1
Hitchin	1.3%	9	2.1%	2	2.2%	3	0.0%	0	0.0%	0	3.3%	3	1.8%	2	0.0%	0
Letchworth Garden City	1.8%	13	1.9%	2	5.5%	7	4.6%	2	0.4%	1	0.0%	0	1.8%	2	0.0%	0
Luton	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Milton Keynes	3.2%	23	3.3%	3	2.0%	2	1.1%	0	4.2%	6	2.1%	2	5.5%	6	2.3%	3
Royston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
St Albans	1.1%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	8
Stevenage	4.8%	35	8.8%	8	4.6%	6	2.8%	1	2.3%	3	2.5%	2	10.6%	12	2.1%	3
Watford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Welwyn Garden City	5.5%	40	6.2%	6	4.3%	5	8.3%	3	1.3%	2	11.5%	9	2.1%	2	9.1%	12
The Galleria, Hatfield	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Internet / mail order / catalogue	4.8%	35	2.0%	2	2.6%	3	8.0%	3	11.0%	16	3.4%	3	2.0%	2	4.3%	6
Arlesey	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	6	0.0%	0
Brent Cross Shopping Centre	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Broadway, Worcestershire	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Bury St. Edmunds	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge Retail Park, Newmarket Road, Cambridge	0.3%	2	0.0%	0	1.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Harlow, Essex	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Kempston	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	3	0.0%	0
Knebworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Manchester	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Melbourn	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	2.9%	21	2.5%	2	5.4%	6	5.7%	2	4.5%	7	1.4%	1	1.8%	2	0.0%	0
Saffron Walden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Shefford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Shepreth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Stotfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Ware	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	6.2%	45	7.7%	7	1.8%	2	9.8%	4	1.5%	2	16.1%	13	2.4%	3	10.5%	14
(Nowhere else)	55.7%	403	64.8%	62	56.8%	68	50.4%	20	47.0%	69	53.9%	42	56.4%	63	59.6%	79
Weighted base:		724		96		119		40		147		79		111		133
Sample:		702		91		107		61		136		71		117		119

Q15 Which town or location did your household last buy DIY / hardware items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
B&Q, Stevenage	16.8%	168	35.1%	52	14.4%	23	10.1%	6	8.5%	16	36.6%	35	21.3%	34	0.9%	2
Homebase, Stevenage	0.9%	9	0.0%	0	3.3%	5	0.0%	0	0.6%	1	1.6%	2	0.4%	1	0.0%	0
Wickes, Letchworth Garden City	12.3%	123	8.3%	12	38.5%	62	30.8%	19	11.8%	23	1.1%	1	4.3%	7	0.0%	0
Wickes, Stevenage	0.5%	5	0.9%	1	0.0%	0	0.6%	0	0.3%	1	2.7%	3	0.0%	0	0.3%	1
Baldock	0.6%	6	0.0%	0	0.4%	1	7.0%	4	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Bedford	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.0%	6	0.0%	0
Biggleswade	3.3%	33	0.0%	0	1.2%	2	4.7%	3	5.5%	11	0.0%	0	11.3%	18	0.0%	0
Bishop's Stortford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	1.7%	18	0.0%	0	0.0%	0	0.0%	0	9.1%	18	0.0%	0	0.0%	0	0.0%	0
Harpenden	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3
Hatfield	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	5.3%	10
Hemel Hempstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Hertford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Hitchin	6.4%	64	23.7%	35	7.0%	11	0.0%	0	0.0%	0	9.9%	10	2.9%	5	1.9%	4
Letchworth Garden City	5.6%	57	7.5%	11	13.9%	22	8.1%	5	4.4%	8	0.0%	0	6.2%	10	0.0%	0
Luton	6.8%	68	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	1.1%	2	35.0%	65
Milton Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Royston	6.5%	66	0.0%	0	0.0%	0	1.3%	1	33.9%	65	0.0%	0	0.0%	0	0.0%	0
St Albans	1.9%	19	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.3%	19
Stevenage	4.7%	48	5.0%	7	5.0%	8	0.7%	0	4.3%	8	13.2%	13	6.4%	10	0.3%	1
Welwyn Garden City	1.5%	15	0.0%	0	1.5%	2	0.0%	0	0.0%	0	2.5%	2	0.3%	1	5.2%	10
Internet / mail order / catalogue	0.8%	8	0.0%	0	0.0%	0	0.7%	0	1.1%	2	0.5%	0	1.8%	3	1.2%	2
B&Q, Bedford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
B&Q, Cambridge	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.3%	3	0.0%	0	0.0%	0	0.0%	0
B&Q, Hemel Hempstead	0.1%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Luton	1.6%	16	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	8.4%	16
B&Q, St Neots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
B&Q, Watford	0.1%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
B&Q, Welwyn Garden City	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	1.0%	2
Country Homes & Gardens, Dunsbridge Turnpike, Shepreth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Eye	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Harlow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Biggleswade	2.7%	27	0.0%	0	0.8%	1	11.8%	7	0.0%	0	0.0%	0	11.6%	18	0.0%	0
Homebase, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Hatfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2
Homebase, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Homebase, St Albans	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2
Knebworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	2	0.0%	0	0.0%	0
Melbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Potterne, Wiltshire	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Screwfix, Letchworth Garden City	0.6%	6	0.4%	1	1.2%	2	0.6%	0	0.0%	0	0.0%	0	1.7%	3	0.0%	0
Screwfix, St Albans	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	6
Screwfix, Stevenage	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.8%	7	0.0%	0	0.0%	0
Shefford	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	2.6%	4	0.0%	0
St Neots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0
Wickes, Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Wickes, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Wyevale Garden Centre, Royston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	3.4%	34	0.8%	1	0.4%	1	2.4%	1	5.6%	11	3.1%	3	4.4%	7	5.5%	10
(Don't regularly buy these kind of goods)	14.2%	143	17.8%	26	12.1%	19	20.1%	12	7.2%	14	15.3%	15	17.4%	28	15.3%	28
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q16 Is there any other town or location you buy DIY / hardware items?
Those who buy DIY / hardware items at a specific location at Q15:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
B&Q, Stevenage	8.3%	68	12.1%	15	15.5%	22	16.2%	8	5.5%	9	8.7%	7	6.0%	7	0.5%	1
Homebase, Stevenage	1.0%	8	1.2%	1	0.4%	1	2.4%	1	1.0%	2	3.6%	3	0.4%	1	0.0%	0
Wickes, Letchworth Garden City	6.2%	51	8.3%	10	9.4%	13	16.0%	8	4.6%	8	1.3%	1	9.2%	11	0.0%	0
Wickes, Stevenage	1.9%	16	2.9%	3	1.4%	2	0.7%	0	2.0%	3	4.5%	4	2.7%	3	0.0%	0
Baldock	0.4%	4	0.0%	0	0.5%	1	3.8%	2	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Bedford	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	4	0.0%	0
Biggleswade	2.3%	19	0.0%	0	1.1%	1	5.2%	2	2.8%	5	0.0%	0	8.2%	10	0.0%	0
Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	2.4%	20	0.0%	0	0.0%	0	0.7%	0	11.6%	19	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	2	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Harpenden	1.0%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	5.4%	8
Hatfield	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	4
Hemel Hempstead	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	3
Hitchin	4.1%	33	15.8%	19	3.5%	5	0.7%	0	0.0%	0	0.6%	0	6.5%	8	0.5%	1
Letchworth Garden City	2.4%	20	3.0%	4	1.9%	3	5.4%	3	2.1%	3	7.0%	6	1.8%	2	0.0%	0
Luton	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	6.7%	10
Milton Keynes	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.1%	3	0.4%	1
Royston	2.1%	17	0.0%	0	0.0%	0	0.0%	0	10.4%	17	0.0%	0	0.0%	0	0.0%	0
St Albans	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	5
Stevenage	4.8%	40	7.1%	9	8.9%	12	3.8%	2	0.3%	1	17.8%	14	0.4%	1	1.1%	2
Welwyn Garden City	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	2.1%	3
Internet / mail order / catalogue	1.6%	13	0.0%	0	1.7%	2	0.0%	0	1.0%	2	0.6%	0	1.4%	2	4.7%	7
B&Q, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0
B&Q, Hemel Hempstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
B&Q, Luton	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.7%	6	1.2%	2
B&Q, St Neots	0.3%	3	0.0%	0	0.0%	0	3.0%	1	0.7%	1	0.0%	0	0.0%	0	0.0%	0
B&Q, Welwyn Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Homebase, Biggleswade	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	2.2%	3	0.0%	0
Homebase, Cambridge	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Homebase, Hatfield	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2
Homebase, Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.8%	5	0.0%	0	0.0%	0
Melbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Screwfix, Letchworth Garden City	0.9%	8	0.0%	0	1.3%	2	5.3%	3	0.7%	1	0.0%	0	1.7%	2	0.0%	0
Screwfix, Stevenage	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.3%	3	0.5%	1	0.0%	0
Screwfix, Welwyn Garden City	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Shefford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Stopsley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Stotfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Wickes, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Don't know / varies)	2.4%	20	3.1%	4	1.5%	2	2.2%	1	5.7%	10	0.0%	0	0.8%	1	1.7%	2
(Nowhere else)	49.3%	407	46.6%	56	51.8%	73	34.6%	17	46.1%	77	42.3%	33	44.8%	56	64.8%	96
Weighted base:		826		120		140		48		167		79		125		147
Sample:		815		104		126		80		157		80		125		143

Q17 Which town or location did your household last buy garden items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
B&Q, Stevenage	5.8%	58	16.2%	24	3.5%	6	6.5%	4	1.5%	3	11.6%	11	6.4%	10	0.4%	1
Homebase, Stevenage	0.3%	3	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.0%	0
Wickes, Letchworth Garden City	1.3%	13	0.4%	1	5.7%	9	3.7%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Wickes, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Baldock	0.7%	7	0.0%	0	0.4%	1	9.0%	6	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Bedford	0.4%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3	0.9%	2
Biggleswade	2.2%	22	0.0%	0	0.0%	0	3.4%	2	0.4%	1	0.0%	0	11.9%	19	0.0%	0
Bishop's Stortford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	1.1%	11	0.0%	0	0.4%	1	2.3%	1	4.6%	9	0.0%	0	0.0%	0	0.0%	0
Harpenden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Hatfield	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.6%	9
Hertford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	3	0.0%	0	0.0%	0
Hitchin	7.7%	78	26.9%	40	9.7%	16	1.1%	1	0.4%	1	10.4%	10	3.1%	5	3.2%	6
Letchworth Garden City	7.6%	76	5.6%	8	28.0%	45	19.0%	12	1.5%	3	0.0%	0	3.7%	6	1.2%	2
Luton	3.9%	40	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.4%	2	19.8%	37
Milton Keynes	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.3%	1
Royston	4.7%	47	0.0%	0	0.0%	0	1.8%	1	22.5%	43	1.6%	2	0.0%	0	0.6%	1
St Albans	4.6%	46	0.5%	1	0.0%	0	0.0%	0	0.0%	0	6.2%	6	0.0%	0	21.3%	40
Stevenage	2.8%	28	4.0%	6	2.3%	4	1.2%	1	5.1%	10	4.8%	5	0.8%	1	1.3%	2
Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Welwyn Garden City	0.7%	7	1.3%	2	1.6%	3	0.0%	0	0.0%	0	0.0%	0	0.3%	1	1.0%	2
Internet / mail order / catalogue	2.4%	24	3.2%	5	3.4%	5	0.6%	0	0.0%	0	1.5%	1	0.6%	1	6.2%	11
Arrington Nurseries, Ermine Way, Arrington	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.0%	4	0.0%	0	0.0%	0	0.0%	0
Aylett Nurseries, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
B&Q, Luton	1.0%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	10
Benington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Berkhamsted	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Bickerdike's Garden Centre, Letchworth Garden City	2.5%	25	0.0%	0	2.1%	3	14.3%	9	0.0%	0	0.0%	0	7.8%	12	0.0%	0
Bolnhurst	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Burlesdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Codicote	2.2%	22	0.9%	1	0.0%	0	0.0%	0	0.0%	0	16.3%	16	1.3%	2	1.3%	2
Country Homes & Gardens, Dunsbridge Turnpike, Shepreth	1.1%	11	0.0%	0	0.0%	0	0.0%	0	5.8%	11	0.0%	0	0.0%	0	0.0%	0
Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Frost's Garden Centre, Willington, Bedford	0.2%	2	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Great Shelford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Henlow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Homebase, Biggleswade	0.8%	8	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0	4.3%	7	0.0%	0
Homebase, Cambridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Homebase, Luton	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	7	0.0%	0
Homebase, St Albans	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Langford Garden Centre, Langford	3.1%	31	0.9%	1	0.0%	0	1.8%	1	0.0%	0	0.0%	0	17.7%	28	0.3%	1
Leicester	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Leighton Buzzard	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Lower Stondon	0.2%	2	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Melbourn	3.2%	32	0.0%	0	0.0%	0	7.1%	4	14.4%	28	0.0%	0	0.0%	0	0.0%	0
Meldreth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.0%	0
Norton	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Notcutts Garden Centre, St Albans	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	9
Orwell	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Phillimore Garden Centre, Melbourn	1.0%	10	0.0%	0	0.0%	0	0.0%	0	5.1%	10	0.0%	0	0.0%	0	0.0%	0
Redbourn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Sandridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Scotsdales Nursery & Garden Centre, Great Shelford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Sevenoaks	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Shefford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.3%	1	0.0%	0
Shepreth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Stotfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Sundridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Tapps Garden Centre,	0.2%	2	0.0%	0	0.0%	0	3.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Wallington Road, Baldock																
Thetford, Norfolk	0.1%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thorne's Garden Nursery, Letchworth Garden City	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Toddington Garden Centre, Toddington	0.2%	2	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Upper Caldecote	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0
Van Hage, Ware	0.5%	5	0.0%	0	0.0%	0	1.2%	1	1.4%	3	1.7%	2	0.0%	0	0.0%	0
Vanstone Park Garden Centre, Codicote	1.5%	15	4.5%	7	0.0%	0	0.0%	0	0.0%	0	8.6%	8	0.0%	0	0.0%	0
Waresley	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wigmore	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Wyevale Garden Centre, Codicote	1.0%	10	1.6%	2	0.0%	0	0.0%	0	0.0%	0	6.5%	6	0.0%	0	0.6%	1
Wyevale Garden Centre, Hitchin	2.7%	27	6.3%	9	9.7%	16	1.7%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Royston	2.7%	27	0.0%	0	0.4%	1	1.1%	1	13.5%	26	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Stevenage	0.9%	9	0.8%	1	0.8%	1	0.0%	0	0.3%	1	5.7%	6	0.0%	0	0.0%	0
(Don't know / varies)	3.8%	38	5.3%	8	4.0%	6	3.0%	2	3.8%	7	4.8%	5	3.6%	6	2.2%	4
(Don't regularly buy these kind of goods)	18.7%	188	20.2%	30	25.0%	40	15.5%	10	11.1%	21	15.9%	15	23.3%	37	18.6%	35
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q18 Is there any other town or location you buy garden items?
Those who buy garden items at a specific location at Q17:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
B&Q, Stevenage	1.9%	14	1.8%	2	2.8%	3	4.3%	2	2.1%	3	3.2%	2	1.0%	1	0.0%	0
Homebase, Stevenage	0.2%	1	0.0%	0	0.0%	0	0.9%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Wickes, Letchworth Garden City	0.5%	4	1.7%	2	0.5%	1	0.9%	0	0.3%	1	0.0%	0	0.5%	1	0.0%	0
Wickes, Stevenage	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0
Baldock	0.4%	3	0.0%	0	0.5%	1	4.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	0.6%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	2.0%	3
Biggleswade	0.8%	6	0.0%	0	0.0%	0	0.9%	0	1.1%	2	0.0%	0	3.6%	4	0.0%	0
Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	1.0%	8	0.5%	1	1.1%	1	0.7%	0	3.5%	6	0.0%	0	0.0%	0	0.0%	0
Harpenden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hatfield	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.3%	6
Hertford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Hitchin	2.1%	16	5.7%	6	3.3%	4	1.5%	1	0.0%	0	6.6%	5	0.5%	1	0.0%	0
Letchworth Garden City	4.3%	33	2.2%	2	11.7%	13	5.7%	3	1.4%	2	7.9%	6	5.5%	6	0.0%	0
Luton	0.8%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	4.0%	6
Milton Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Royston	1.4%	11	0.0%	0	0.0%	0	0.0%	0	6.1%	10	0.0%	0	0.0%	0	0.4%	1
St Albans	0.7%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	3.2%	5
Stevenage	2.9%	23	2.8%	3	10.8%	12	0.0%	0	1.7%	3	3.5%	3	1.0%	1	0.4%	1
Welwyn Garden City	1.1%	8	1.1%	1	2.1%	2	0.7%	0	0.3%	1	0.0%	0	0.0%	0	2.5%	4
Internet / mail order / catalogue	1.7%	13	0.7%	1	3.4%	4	1.5%	1	3.2%	5	0.8%	1	0.0%	0	1.2%	2
Aylett Nurseries, St Albans	1.0%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	8
B&Q, Luton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Bickerdike's Garden Centre, Letchworth Garden City	0.9%	7	0.0%	0	2.3%	3	5.9%	3	0.0%	0	0.0%	0	1.4%	2	0.0%	0
Bridport	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Codicote	0.6%	5	1.8%	2	0.0%	0	0.0%	0	0.0%	0	2.1%	2	0.0%	0	0.8%	1
Country Homes & Gardens, Dunsbridge Turnpike, Shepreth	0.9%	7	0.0%	0	0.0%	0	0.0%	0	3.8%	6	1.2%	1	0.0%	0	0.0%	0
Crews Hill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0
Donnington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Dunstable	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Frost's Garden Centre, Willington, Bedford	0.9%	7	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	5.0%	6	0.0%	0
Great Shelford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Harlow, Essex	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Henlow	0.2%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Homebase, Biggleswade	0.4%	3	0.0%	0	1.1%	1	2.8%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Ickleford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Langford Garden Centre, Langford	0.9%	7	2.1%	2	0.0%	0	0.7%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0
London Colney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Lower Stondon	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Melbourn	0.3%	2	0.0%	0	0.0%	0	1.4%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0
Norton	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Notcutts Garden Centre, St Albans	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Phillimore Garden Centre, Melbourn	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Sandridge	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Scotsdales Nursery & Garden Centre, Great Shelford	0.7%	5	0.0%	0	0.0%	0	0.0%	0	3.3%	5	0.0%	0	0.0%	0	0.0%	0
Shefford	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.4%	1	0.0%	0
Stondon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Tapps Garden Centre, Wallington Road, Baldock	0.1%	1	0.0%	0	0.0%	0	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Thorne's Garden Nursery, Letchworth Garden City	0.9%	7	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0	5.3%	6	0.0%	0
Toddington Garden Centre, Toddington	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.4%	1
Van Hage, Ware	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	2.1%	2	0.0%	0	0.0%	0
Vanstone Park Garden Centre, Codicote	1.3%	10	2.7%	3	0.0%	0	0.0%	0	0.0%	0	9.1%	7	0.0%	0	0.0%	0
Waresley	0.4%	3	0.0%	0	0.0%	0	0.7%	0	1.7%	3	0.0%	0	0.0%	0	0.0%	0
Woburn	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Wyevale Garden Centre,	0.6%	5	0.5%	1	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0	1.2%	2

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Codicote																
Wyevale Garden Centre, Hitchin	1.3%	10	2.3%	2	5.7%	6	0.0%	0	0.3%	1	0.6%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Royston	0.6%	5	0.0%	0	0.0%	0	0.9%	0	2.7%	4	0.0%	0	0.0%	0	0.0%	0
Wyevale Garden Centre, Stevenage	0.4%	3	1.2%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Don't know / varies)	5.9%	46	7.0%	8	6.3%	7	7.0%	4	2.9%	5	20.6%	16	3.5%	4	1.9%	3
(Nowhere else)	56.5%	439	65.3%	72	46.5%	53	56.3%	28	57.5%	94	35.4%	27	58.1%	68	66.4%	98
Weighted base:		777		110		114		50		163		77		116		147
Sample:		784		104		115		76		150		78		120		141

Q19 Which town or location did your household last buy health, beauty and chemist items?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	3.8%	38	0.5%	1	2.0%	3	46.4%	29	1.0%	2	0.0%	0	2.5%	4	0.0%	0
Bedford	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	3.3%	5	0.0%	0
Biggleswade	1.0%	10	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0	6.0%	10	0.0%	0
Bishop's Stortford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.3%	2	0.0%	0
Buntingford	0.7%	7	0.0%	0	0.0%	0	0.0%	0	3.5%	7	0.0%	0	0.0%	0	0.0%	0
Cambridge	3.1%	31	0.7%	1	0.0%	0	0.0%	0	15.7%	30	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.4%	1	0.0%	0
Harpenden	6.5%	65	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	34.0%	63
Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Hitchin	19.3%	194	83.9%	124	7.7%	12	1.4%	1	0.0%	0	15.5%	15	20.9%	33	4.7%	9
Letchworth Garden City	16.0%	161	3.6%	5	79.8%	128	13.2%	8	1.9%	4	6.8%	7	6.1%	10	0.0%	0
Luton	4.6%	46	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.5%	0	0.0%	0	24.0%	45
Milton Keynes	0.9%	9	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	5.1%	8	0.0%	0
Royston	11.3%	113	0.0%	0	0.0%	0	1.8%	1	58.4%	112	0.0%	0	0.0%	0	0.0%	0
St Albans	0.6%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	2.7%	5
Stevenage	4.1%	41	3.6%	5	0.5%	1	0.7%	0	1.2%	2	21.3%	21	7.2%	11	0.3%	1
Watford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
Welwyn Garden City	2.7%	27	1.3%	2	0.4%	1	4.8%	3	0.6%	1	10.2%	10	0.4%	1	5.4%	10
Bluewater	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
The Galleria, Hatfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Internet / mail order / catalogue	4.3%	44	2.1%	3	2.5%	4	2.3%	1	7.8%	15	4.4%	4	8.4%	13	1.3%	2
Arlesey	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Ashwell	1.1%	11	0.0%	0	0.0%	0	16.4%	10	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Barley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Barton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Bassingbourn cum Kneesworth	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	0.0%	0	0.0%	0
Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Broadwater Retail Park, Stevenage	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	4	0.0%	0	0.0%	0
Codicote	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Colney Fields, London Colney	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Dartford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0
Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Great Ashfield	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Henlow	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Knebworth	1.2%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.0%	12	0.0%	0	0.0%	0
Lower Stondon	0.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.6%	6	0.0%	0
Melbourn	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.3%	3	0.0%	0	0.0%	0	0.7%	0	0.6%	1	1.7%	2	0.0%	0	0.0%	0
Shefford	4.2%	42	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	24.7%	39	0.0%	0
Stopsley	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	3
Stotfold	0.9%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.5%	9	0.0%	0
Watton-at-Stone	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Wheathampstead	2.6%	27	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	27
Wigmore	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	8
(Don't know / varies)	1.3%	13	2.1%	3	0.0%	0	4.1%	3	0.6%	1	5.5%	5	0.8%	1	0.0%	0
(Don't regularly buy these kind of goods)	3.9%	39	1.8%	3	5.8%	9	7.6%	5	1.0%	2	8.5%	8	0.8%	1	6.0%	11
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q20 Is there any other town or location you buy health, beauty and chemist items?

Those who buy health, beauty and chemist items at a specific location at Q19:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	1.8%	17	0.0%	0	3.0%	5	20.1%	11	0.4%	1	0.0%	0	0.4%	1	0.0%	0
Bedford	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.2%	8	0.0%	0
Biggleswade	0.7%	7	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	4.1%	6	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	2.6%	24	0.0%	0	1.7%	3	0.8%	0	11.3%	21	0.0%	0	0.0%	0	0.0%	0
Central London	1.7%	16	0.0%	0	0.0%	0	0.8%	0	0.0%	0	6.7%	6	0.4%	1	5.3%	9
Harpenden	0.7%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	3.3%	6
Hatfield	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	3
Hertford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	2	0.0%	0	0.0%	0
Hitchin	3.4%	33	4.6%	7	1.8%	3	1.4%	1	0.3%	1	3.7%	3	12.0%	19	0.0%	0
Letchworth Garden City	3.2%	30	1.8%	3	8.0%	12	7.6%	4	1.8%	3	0.0%	0	5.1%	8	0.0%	0
Luton	0.6%	5	0.4%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	3
Milton Keynes	0.7%	7	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0	2.6%	4	1.2%	2
Royston	3.5%	33	0.0%	0	0.0%	0	0.0%	0	17.6%	33	0.0%	0	0.0%	0	0.0%	0
St Albans	0.5%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	2.6%	5
Stevenage	4.0%	38	7.8%	11	7.8%	12	0.8%	0	0.4%	1	12.1%	10	2.9%	4	0.0%	0
Watford	0.3%	3	1.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Welwyn Garden City	3.3%	32	3.1%	4	4.0%	6	2.7%	1	0.0%	0	10.0%	8	1.0%	2	5.7%	10
Internet / mail order / catalogue	3.9%	37	0.0%	0	2.1%	3	2.8%	2	9.7%	18	4.4%	4	6.8%	11	0.0%	0
Ashwell	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Broadwater Retail Park, Stevenage	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Brookfield Retail Park, Cheshunt	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	0.0%	0	0.0%	0
Codicote	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Henlow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Knebworth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	2	0.0%	0	0.0%	0
London Colney	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Melbourn	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Meppershall	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Roaring Meg Retail Park, Stevenage	0.6%	6	0.0%	0	0.0%	0	0.8%	0	0.4%	1	5.7%	5	0.0%	0	0.0%	0
Saffron Walden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Shefford	0.8%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	8	0.0%	0
St Neots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Stopsley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Stotfold	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2	0.0%	0
Wheathampstead	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.6%	1
(Don't know / varies)	0.9%	8	1.4%	2	1.0%	1	2.0%	1	0.6%	1	1.5%	1	0.4%	1	0.3%	1
(Nowhere else)	63.7%	606	79.2%	112	69.7%	105	58.1%	32	55.5%	105	47.6%	40	51.4%	81	75.4%	132
Weighted base:		950		142		151		54		189		83		157		175
Sample:		942		134		137		86		176		90		148		171

Q21 Which town or location did your household last buy other non-food items such as books, CDs, toys and gifts?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.9%	9	0.4%	1	1.2%	2	9.2%	6	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Bedford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0
Biggleswade	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Bishop's Stortford	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	3.5%	35	0.0%	0	0.0%	0	1.8%	1	17.6%	34	0.0%	0	0.0%	0	0.0%	0
Central London	0.2%	2	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.3%	1	0.4%	1
Harpenden	1.4%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	7.2%	13
Hatfield	0.2%	2	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	2
Hitchin	10.1%	101	33.1%	49	7.4%	12	2.9%	2	0.3%	1	15.3%	15	9.6%	15	4.3%	8
Letchworth Garden City	8.8%	88	3.2%	5	36.0%	58	23.9%	15	0.9%	2	1.6%	2	4.5%	7	0.4%	1
Luton	3.0%	30	0.0%	0	0.5%	1	0.0%	0	0.6%	1	0.0%	0	4.0%	6	11.5%	21
Milton Keynes	0.9%	9	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	7	0.7%	1
Royston	2.7%	27	0.0%	0	0.0%	0	0.6%	0	13.7%	26	0.0%	0	0.0%	0	0.0%	0
St Albans	1.1%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	5.2%	10
Stevenage	3.5%	36	6.3%	9	2.2%	4	4.1%	3	2.8%	5	12.8%	12	1.2%	2	0.3%	1
Watford	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Welwyn Garden City	1.1%	11	1.6%	2	0.0%	0	0.0%	0	0.0%	0	4.3%	4	0.0%	0	2.6%	5
The Galleria, Hatfield	0.5%	5	1.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Internet / mail order / catalogue	48.3%	485	38.4%	57	40.4%	65	40.9%	25	53.2%	102	53.2%	51	51.8%	83	55.1%	103
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Bridport, Dorset	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Broadwater Retail Park, Stevenage	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Gatwick Airport	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	0	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.4%	4	0.0%	0	0.0%	0	1.2%	1	0.3%	1	1.6%	2	0.7%	1	0.0%	0
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Shefford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0
St Neots	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Stotfold	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Wigmore	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
(Don't know / varies)	0.6%	6	2.0%	3	0.8%	1	0.0%	0	0.6%	1	0.0%	0	0.4%	1	0.0%	0
(Don't regularly buy these kind of goods)	11.0%	110	12.6%	19	11.5%	18	14.2%	9	6.6%	13	7.2%	7	17.9%	29	8.7%	16
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q22 Is there any other town or location you buy other non-food items?
Those who buy other non-food items at a specific location at Q21:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.5%	4	0.0%	0	0.0%	0	5.6%	3	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Bedford	0.4%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.8%	4	0.0%	0
Biggleswade	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Bishop's Stortford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	2	0.0%	0
Cambridge	4.4%	39	2.9%	4	0.4%	1	4.2%	2	18.2%	32	0.0%	0	0.0%	0	0.0%	0
Central London	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.6%	0	1.8%	2	0.0%	0
Harpenden	0.5%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.5%	4
Hatfield	0.4%	3	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.8%	1	0.7%	1
Hemel Hempstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Hitchin	6.3%	56	23.0%	29	6.4%	9	2.9%	2	0.0%	0	1.7%	2	11.5%	15	0.0%	0
Letchworth Garden City	5.8%	52	8.2%	10	14.8%	21	19.0%	10	2.6%	5	0.0%	0	4.5%	6	0.0%	0
Luton	1.4%	12	1.0%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	5.8%	10
Milton Keynes	1.5%	13	0.0%	0	0.0%	0	0.8%	0	0.0%	0	1.8%	2	6.4%	8	1.4%	2
Royston	2.5%	22	0.0%	0	0.0%	0	1.4%	1	12.0%	21	0.0%	0	0.0%	0	0.0%	0
St Albans	2.0%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.6%	18
Stevenage	2.1%	19	2.5%	3	2.8%	4	1.5%	1	2.6%	5	1.9%	2	3.4%	4	0.0%	0
Watford	0.8%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.1%	7
Welwyn Garden City	2.6%	23	5.4%	7	0.4%	1	0.7%	0	0.0%	0	9.6%	9	0.0%	0	3.8%	6
The Galleria, Hatfield	0.4%	4	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.6%	3
Internet / mail order / catalogue	6.8%	61	7.8%	10	7.7%	11	12.6%	7	7.9%	14	5.9%	5	7.6%	10	2.3%	4
Berkhamsted	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.3%	1
Bournemouth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0
Broadwater Retail Park, Stevenage	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Brookfield Retail Park, Cheshunt	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.3%	1	1.2%	1	0.0%	0	0.0%	0
Maidstone	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0
Roaring Meg Retail Park, Stevenage	0.4%	3	0.5%	1	0.5%	1	2.1%	1	0.3%	1	0.6%	0	0.0%	0	0.0%	0
Romford	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	0	0.0%	0	0.0%	0
Shefford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Shepreth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know / varies)	2.6%	23	2.0%	3	1.9%	3	2.7%	1	1.3%	2	14.8%	13	0.5%	1	0.0%	0
(Nowhere else)	56.8%	504	45.4%	57	64.9%	91	46.4%	25	53.6%	95	56.3%	51	56.2%	73	66.1%	112
Weighted base:		887		126		140		53		178		90		130		170
Sample:		852		114		125		85		162		87		123		156

Q23 At which of the following town centres do you visit the shops, services or market? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	27.0%	271	20.4%	30	41.0%	66	92.9%	57	21.0%	40	13.2%	13	37.7%	60	2.8%	5
Hitchin	63.7%	639	99.5%	147	83.2%	133	56.0%	34	27.7%	53	70.2%	68	85.8%	137	36.0%	67
Letchworth Garden City	53.4%	535	62.0%	91	90.4%	145	81.6%	50	42.3%	81	36.5%	35	74.9%	119	7.2%	13
Royston	20.4%	204	3.3%	5	2.5%	4	15.0%	9	91.5%	175	1.1%	1	5.3%	8	0.9%	2
(None of these)	15.9%	160	0.5%	1	0.7%	1	0.0%	0	4.3%	8	25.5%	25	5.0%	8	62.8%	117
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q24 What if anything would make you visit Baldock town centre more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better choice of clothing shops	3.6%	36	1.6%	2	11.2%	18	7.0%	4	2.8%	5	1.3%	1	3.3%	5	0.0%	0
Better choice of shops in general	13.6%	136	18.1%	27	19.6%	31	34.9%	21	11.7%	22	3.4%	3	18.6%	30	0.7%	1
Better maintenance / cleanliness	0.3%	3	0.0%	0	0.8%	1	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Better quality shops	2.1%	21	5.6%	8	1.5%	2	7.6%	5	0.7%	1	0.6%	1	1.1%	2	1.0%	2
Better street market	0.8%	8	0.0%	0	2.2%	3	2.9%	2	1.2%	2	0.0%	0	0.4%	1	0.0%	0
Free WI-FI	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	1.8%	18	0.4%	1	0.8%	1	1.1%	1	1.7%	3	0.5%	0	4.6%	7	2.1%	4
More car parking	4.1%	41	3.0%	4	1.2%	2	5.0%	3	5.7%	11	3.0%	3	10.3%	16	0.7%	1
More food supermarkets	0.9%	9	1.6%	2	1.7%	3	0.7%	0	0.6%	1	0.0%	0	1.1%	2	0.3%	1
More large shops	2.2%	22	4.5%	7	7.9%	13	1.1%	1	0.6%	1	0.0%	0	0.8%	1	0.0%	0
More traffic free areas / pedestrianisation	0.3%	3	0.0%	0	1.2%	2	1.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other	2.4%	24	4.5%	7	0.4%	1	3.2%	2	4.4%	8	0.6%	1	2.7%	4	1.0%	2
Cheaper / free parking	0.4%	4	0.8%	1	0.0%	0	2.3%	1	0.4%	1	0.0%	0	0.3%	1	0.0%	0
Easier access by car	0.1%	1	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Improved traffic system / less congestion	0.4%	4	0.8%	1	0.5%	1	2.5%	2	0.0%	0	0.0%	0	0.3%	1	0.0%	0
More cafés and restaurants	0.8%	8	0.0%	0	0.0%	0	0.7%	0	1.2%	2	5.7%	6	0.0%	0	0.0%	0
More independent shops	1.4%	14	0.0%	0	0.5%	1	11.0%	7	1.9%	4	1.6%	2	0.0%	0	0.7%	1
(Nothing)	63.0%	631	57.1%	84	50.4%	81	44.7%	28	70.6%	135	62.3%	60	52.2%	83	86.1%	160
(Don't know)	12.1%	122	19.5%	29	15.5%	25	1.8%	1	5.7%	11	22.6%	22	13.3%	21	6.9%	13
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q25 What if anything would make you visit Hitchin town centre more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better choice of clothing shops	5.0%	50	10.8%	16	6.0%	10	0.0%	0	0.3%	1	4.8%	5	11.5%	18	0.7%	1
Better choice of shops in general	4.7%	47	11.8%	17	2.8%	4	0.0%	0	2.2%	4	4.7%	5	8.4%	13	2.0%	4
Better maintenance / cleanliness	0.2%	2	0.5%	1	0.0%	0	0.6%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Better quality shops	1.9%	19	6.2%	9	1.9%	3	0.0%	0	0.0%	0	2.2%	2	2.1%	3	0.7%	1
Better street market	1.9%	19	3.4%	5	2.1%	3	0.0%	0	1.1%	2	1.5%	1	1.1%	2	2.6%	5
Free WI-FI	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	1.1%	11	0.8%	1	0.8%	1	1.7%	1	0.3%	1	3.6%	3	0.0%	0	2.1%	4
More car parking	8.5%	85	9.7%	14	8.0%	13	16.9%	10	4.6%	9	16.2%	16	8.7%	14	4.8%	9
More food supermarkets	0.5%	5	0.8%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	1.4%	2	0.4%	1
More large shops	2.3%	23	3.3%	5	6.6%	11	3.0%	2	0.0%	0	1.6%	2	2.3%	4	0.3%	1
More traffic free areas / pedestrianisation	1.6%	16	6.1%	9	1.5%	2	0.6%	0	0.6%	1	1.5%	1	1.0%	2	0.0%	0
Other	5.1%	52	12.0%	18	8.9%	14	0.7%	0	2.9%	6	1.1%	1	6.4%	10	1.2%	2
A larger Marks and Spencer store	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.7%	1
Cheaper parking	2.8%	28	4.6%	7	4.9%	8	3.1%	2	0.6%	1	4.1%	4	3.4%	5	0.6%	1
Churchgate needs updating / modernising	0.2%	2	1.2%	2	0.0%	0	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free parking	2.4%	24	2.9%	4	0.0%	0	8.2%	5	0.0%	0	7.3%	7	2.4%	4	1.9%	4
Improved traffic system / less congestion	0.9%	9	2.1%	3	2.4%	4	0.0%	0	0.0%	0	0.5%	0	0.4%	1	0.4%	1
More cafés and restaurants	0.9%	9	0.5%	1	4.3%	7	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.3%	1
More disabled parking / access	0.2%	2	0.8%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More independent shops	1.3%	13	2.1%	3	1.9%	3	3.5%	2	0.0%	0	2.3%	2	0.6%	1	0.7%	1
Open a John Lewis store	0.3%	3	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	0	1.1%	2	0.0%	0
Remove the cobbles from the town centre	0.4%	4	0.8%	1	1.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Nothing)	63.5%	636	38.1%	56	56.2%	90	62.6%	39	80.1%	153	55.7%	54	57.4%	91	82.1%	153
(Don't know)	4.5%	45	2.5%	4	5.9%	9	0.6%	0	6.9%	13	12.4%	12	2.6%	4	1.3%	2
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q26 What if anything would make you visit Letchworth Garden City town centre more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better choice of clothing shops	6.2%	62	7.0%	10	13.9%	22	3.6%	2	4.3%	8	5.4%	5	5.4%	9	2.7%	5
Better choice of shops in general	13.3%	134	11.3%	17	28.0%	45	24.3%	15	5.6%	11	5.0%	5	22.2%	35	3.5%	6
Better maintenance / cleanliness	0.6%	6	1.2%	2	1.7%	3	0.0%	0	0.0%	0	2.0%	2	0.0%	0	0.0%	0
Better quality shops	7.2%	73	9.8%	14	18.1%	29	9.4%	6	1.4%	3	4.4%	4	9.9%	16	0.4%	1
Better street market	0.3%	3	0.0%	0	1.6%	3	0.6%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Free WI-FI	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	1.2%	12	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.5%	0	4.3%	7	2.1%	4
More car parking	4.0%	41	1.4%	2	2.4%	4	6.5%	4	5.1%	10	2.1%	2	11.1%	18	0.6%	1
More food supermarkets	1.1%	11	0.0%	0	3.2%	5	0.0%	0	2.4%	5	0.6%	1	0.7%	1	0.0%	0
More large shops	2.2%	22	1.6%	2	6.2%	10	5.5%	3	0.4%	1	0.6%	1	3.0%	5	0.0%	0
More traffic free areas / pedestrianisation	0.2%	2	0.0%	0	0.0%	0	0.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Other	2.6%	26	0.5%	1	8.8%	14	1.1%	1	4.0%	8	0.6%	1	1.3%	2	0.3%	1
Cheaper parking	0.4%	4	0.8%	1	0.4%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0	0.0%	0
Free parking	0.4%	4	0.0%	0	0.5%	1	1.3%	1	1.0%	2	0.0%	0	0.0%	0	0.4%	1
Improved traffic system / less congestion	0.2%	2	0.0%	0	0.8%	1	1.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Less charity / cheap shops	0.3%	3	0.0%	0	1.3%	2	0.7%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Less vacant shops	0.9%	9	0.4%	1	3.9%	6	2.3%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1
More cafés and restaurants	0.8%	8	0.0%	0	4.3%	7	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
More independent shops	0.9%	9	0.8%	1	2.8%	5	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.7%	1
Open a Debenhams store	0.2%	2	0.0%	0	0.5%	1	1.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Refurbishment of the town centre	0.9%	9	0.8%	1	0.4%	1	8.3%	5	0.3%	1	0.6%	1	0.7%	1	0.0%	0
Re-open the Marks and Spencer store	0.3%	3	0.0%	0	0.8%	1	0.6%	0	0.3%	1	0.0%	0	0.3%	1	0.0%	0
(Nothing)	61.3%	615	59.0%	87	24.2%	39	49.4%	30	75.1%	144	69.8%	68	52.5%	84	88.0%	164
(Don't know)	7.4%	75	16.1%	24	6.5%	10	0.0%	0	3.9%	7	14.2%	14	7.6%	12	3.8%	7
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q27 What if anything would make you visit Royston Town Centre more often? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Better choice of clothing shops	4.1%	41	0.0%	0	4.3%	7	0.6%	0	17.5%	33	0.0%	0	0.0%	0	0.0%	0
Better choice of shops in general	10.8%	109	0.0%	0	0.8%	1	2.0%	1	54.0%	103	0.0%	0	1.7%	3	0.0%	0
Better maintenance / cleanliness	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Better quality shops	2.8%	28	1.6%	2	1.5%	2	0.0%	0	12.1%	23	0.0%	0	0.0%	0	0.0%	0
Better street market	0.4%	4	0.0%	0	0.0%	0	0.0%	0	2.1%	4	0.0%	0	0.0%	0	0.0%	0
Free WI-FI	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Improved bus services	1.0%	10	0.0%	0	0.0%	0	1.1%	1	0.0%	0	6.2%	6	0.3%	1	1.5%	3
More car parking	1.8%	18	0.0%	0	0.0%	0	3.6%	2	7.4%	14	0.0%	0	0.4%	1	0.3%	1
More food supermarkets	1.3%	13	0.0%	0	0.0%	0	1.8%	1	6.0%	11	0.0%	0	0.0%	0	0.0%	0
More large shops	1.4%	14	0.0%	0	4.3%	7	0.6%	0	3.2%	6	0.0%	0	0.4%	1	0.0%	0
More traffic free areas / pedestrianisation	0.3%	3	0.8%	1	0.0%	0	0.6%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0
Other	1.5%	15	0.5%	1	0.0%	0	1.3%	1	6.2%	12	0.6%	1	0.0%	0	0.3%	1
Cheaper parking	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.6%	3	0.0%	0	0.0%	0	0.0%	0
Free parking	2.0%	20	0.0%	0	0.0%	0	6.4%	4	8.4%	16	0.0%	0	0.0%	0	0.0%	0
Less charity / cheap shops	0.3%	3	0.0%	0	0.0%	0	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0
Less vacant shops	1.7%	17	0.0%	0	0.0%	0	0.0%	0	5.9%	11	0.0%	0	3.6%	6	0.0%	0
More independent shops	0.8%	8	0.0%	0	0.0%	0	0.0%	0	4.2%	8	0.0%	0	0.0%	0	0.0%	0
Repair pavements	0.5%	5	0.0%	0	0.0%	0	0.0%	0	2.7%	5	0.0%	0	0.0%	0	0.0%	0
(Nothing)	61.6%	618	57.5%	85	59.3%	95	71.4%	44	23.4%	45	67.9%	66	71.8%	114	91.0%	170
(Don't know)	19.2%	192	39.6%	58	34.0%	54	11.8%	7	0.3%	1	25.2%	24	21.8%	35	6.8%	13
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q28 Do you or your family do any of the following leisure activities? [MR/PR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Cinema	66.0%	662	67.4%	99	76.6%	123	62.0%	38	64.8%	124	60.5%	59	67.9%	108	59.6%	111
Theatre	57.0%	572	58.6%	86	44.4%	71	40.4%	25	63.9%	122	54.5%	53	54.6%	87	68.4%	127
Pub / bar	63.1%	633	66.6%	98	60.3%	97	60.6%	37	68.8%	132	61.1%	59	60.6%	96	61.0%	114
Restaurant	82.2%	824	84.7%	125	84.8%	136	76.8%	47	83.0%	159	76.6%	74	79.1%	126	84.2%	157
Nightclub	10.8%	108	11.5%	17	9.5%	15	0.7%	0	10.9%	21	2.0%	2	15.0%	24	15.4%	29
Bingo	2.8%	28	4.1%	6	3.1%	5	0.6%	0	1.2%	2	1.8%	2	2.7%	4	4.4%	8
Health & fitness club	33.2%	333	34.2%	50	36.7%	59	30.7%	19	37.7%	72	38.0%	37	31.8%	51	24.3%	45
Tenpin bowling	24.5%	246	24.8%	37	19.6%	31	18.5%	11	29.8%	57	21.0%	20	29.3%	47	23.0%	43
(None of these)	6.2%	62	10.0%	15	4.7%	8	7.5%	5	6.2%	12	4.1%	4	5.3%	8	5.9%	11
(Don’t know)	0.3%	4	0.0%	0	1.8%	3	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Q29 At which town or location did you or your family last visit the cinema?

Those who visit the cinema at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.2%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Bedford	0.8%	5	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.0%	5	0.0%	0
Bishop's Stortford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	8.4%	56	0.0%	0	0.0%	0	0.0%	0	43.3%	54	0.0%	0	1.9%	2	0.0%	0
Central London	0.5%	3	0.6%	1	1.6%	2	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Harpenden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	2
Hatfield	4.3%	29	0.6%	1	0.0%	0	0.0%	0	1.8%	2	1.0%	1	0.0%	0	22.7%	25
Hemel Hempstead	1.5%	10	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.7%	10
Hitchin	0.3%	2	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Letchworth Garden City	40.2%	266	55.1%	55	80.1%	98	72.2%	28	11.5%	14	26.6%	16	49.8%	54	1.8%	2
Luton	4.8%	32	2.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.6%	30
Milton Keynes	0.7%	5	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0	3.7%	4	0.5%	1
Royston	1.8%	12	0.0%	0	0.0%	0	0.0%	0	9.7%	12	0.0%	0	0.0%	0	0.0%	0
St Albans	1.1%	7	0.0%	0	1.0%	1	0.0%	0	0.0%	0	1.0%	1	0.0%	0	4.7%	5
Stevenage	28.5%	189	39.5%	39	14.6%	18	26.8%	10	29.2%	36	48.6%	28	38.2%	41	13.9%	15
The Galleria, Hatfield	1.4%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.1%	4	0.0%	0	5.0%	6
Watford	0.6%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.8%	4
Welwyn Garden City	3.3%	22	0.6%	1	0.0%	0	0.0%	0	0.5%	1	14.9%	9	0.0%	0	10.4%	12
Barkway	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Berkhampstead	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.6%	1
Saffron Walden	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Southend-on-Sea	0.2%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	0.3%	2	0.7%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weighted base:		662		99		123		38		124		59		108		111
Sample:		610		82		107		62		105		59		101		94

Q30 At which town or location did you or your family last visit the Theatre?
Those who visit the theatre at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	0.2%	1	0.0%	0	0.0%	0	5.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cambridge	10.4%	59	1.4%	1	4.7%	3	11.8%	3	39.9%	49	1.9%	1	2.2%	2	0.0%	0
Central London	55.7%	318	47.7%	41	54.1%	38	54.8%	14	50.6%	62	69.4%	37	52.7%	46	63.3%	81
Harpenden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	1
Hertford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Hitchin	4.2%	24	18.2%	16	6.1%	4	3.2%	1	0.0%	0	2.0%	1	1.5%	1	0.5%	1
Letchworth Garden City	2.2%	13	3.4%	3	8.8%	6	8.6%	2	0.6%	1	0.0%	0	0.6%	1	0.0%	0
Luton	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1
Milton Keynes	5.9%	34	1.4%	1	0.9%	1	4.6%	1	2.7%	3	0.9%	0	19.4%	17	8.1%	10
St Albans	1.4%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.4%	8
Stevenage	12.2%	70	24.4%	21	18.2%	13	7.1%	2	3.4%	4	16.5%	9	16.7%	15	5.0%	6
Welwyn Garden City	1.3%	8	1.4%	1	0.0%	0	0.0%	0	0.0%	0	7.5%	4	0.0%	0	2.0%	3
Aylesbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Bournemouth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Bromley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Canterbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Cardigan, Wales	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chichester	0.1%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cromer	0.1%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Dunstable	2.3%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.4%	13
Edinburgh	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Horsham	0.1%	0	0.0%	0	0.0%	0	1.4%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Manchester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Southampton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Stanford-le-Hope	0.1%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Stratford-upon-Avon	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	0	0.0%	0	0.0%	0
Toddington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Wheathampstead	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
(Don't know / can't remember)	2.3%	13	1.4%	1	5.2%	4	1.4%	0	1.0%	1	0.0%	0	6.9%	6	0.4%	1
Weighted base:		572		86		71		25		122		53		87		127
Sample:		570		83		74		50		106		61		86		110

Column %ges.

Q31 At which town or location did you or your family last visit a pub / bar?
Those who visit pubs / bars at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	4.6%	29	1.2%	1	6.4%	6	51.6%	19	0.0%	0	0.0%	0	2.4%	2	0.0%	0
Bedford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.0%	2	0.0%	0
Biggleswade	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bishop's Stortford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0	0.0%	0
Cambridge	2.8%	18	0.0%	0	0.8%	1	0.0%	0	11.1%	15	1.0%	1	2.1%	2	0.0%	0
Central London	3.3%	21	6.2%	6	4.6%	4	0.0%	0	0.5%	1	0.0%	0	0.7%	1	8.2%	9
Harpenden	6.7%	42	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	37.4%	42
Hatfield	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0
Hitchin	25.6%	162	86.3%	85	19.7%	19	10.5%	4	0.0%	0	30.7%	18	29.4%	28	6.9%	8
Letchworth Garden City	7.5%	47	0.0%	0	43.1%	42	2.8%	1	0.4%	1	0.0%	0	4.3%	4	0.0%	0
Luton	2.2%	14	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.2%	14
Milton Keynes	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Royston	10.9%	69	1.3%	1	1.3%	1	0.0%	0	48.8%	64	0.0%	0	2.1%	2	0.0%	0
St Albans	1.7%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.6%	11
Stevenage	1.6%	10	1.8%	2	1.3%	1	0.0%	0	0.5%	1	9.2%	5	0.0%	0	0.6%	1
Welwyn Garden City	1.1%	7	0.0%	0	2.6%	3	0.0%	0	0.0%	0	5.2%	3	0.0%	0	1.0%	1
Abington Pigotts	0.1%	1	0.0%	0	0.0%	0	0.9%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Arlesey	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Ashwell	2.4%	15	0.0%	0	0.0%	0	31.2%	12	2.7%	4	0.0%	0	0.0%	0	0.0%	0
Aston	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	0.0%	0
Barkway	0.4%	3	0.0%	0	0.0%	0	0.0%	0	1.9%	3	0.0%	0	0.0%	0	0.0%	0
Barley	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Barton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Bassingbourn cum Kneesworth	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.4%	3	0.0%	0	0.0%	0	0.0%	0
Breaston	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Broom	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Caldicot	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chalfont St Peter	0.1%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Clifton	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.4%	3	0.0%	0
Codicote	0.7%	4	0.0%	0	0.6%	1	0.0%	0	0.0%	0	5.9%	4	0.0%	0	0.0%	0
Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Datchworth	0.5%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	5.1%	3	0.0%	0	0.0%	0
Dunstable	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.6%	1
Fowlmere	0.4%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Furneux Pelham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Gosmore	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Great Chishill	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Henlow	2.4%	15	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	15.0%	14	0.0%	0
Hexton	0.2%	1	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Heydon	1.0%	6	0.0%	0	0.0%	0	0.0%	0	4.7%	6	0.0%	0	0.0%	0	0.0%	0
Kimpton	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Kings Walden	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Knebworth	2.0%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	19.9%	12	0.0%	0	1.0%	1
Lemsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Littlington	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Market Rasen	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Melbourn	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.2%	3	0.0%	0	0.0%	0	0.0%	0
Meldreth	0.5%	3	0.0%	0	0.0%	0	0.0%	0	2.3%	3	0.0%	0	0.0%	0	0.0%	0
Meppershall	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	2	0.0%	0
Norton	0.1%	1	0.0%	0	0.6%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Offley	1.0%	7	0.7%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	6.0%	6	0.0%	0
Oldbury	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Orwell	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Preston	0.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	1	0.0%	0	1.0%	1
Purton	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0
Rugeley	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.8%	0	0.0%	0	0.0%	0
Rushden	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Rushton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Shefford	1.3%	8	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	8.1%	8	0.0%	0
Shillington	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.8%	2	0.0%	0
Stanstead Abbotts	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1
Stopsley	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	2
Stotfold	1.4%	9	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	7.7%	7	0.0%	0
Tetworth	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.7%	2	0.0%	0	0.0%	0	0.0%	0
Tewin	0.1%	1	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Therfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.0%	0
Thriplow	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Todds Green	0.2%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Westerham	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.1%	1	0.0%	0
Weston	1.1%	7	0.0%	0	1.3%	1	0.0%	0	0.0%	0	9.4%	6	0.0%	0	0.0%	0
Wheathampstead	2.7%	17	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	17
Willian	0.5%	3	0.0%	0	2.7%	3	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Woolmer Green	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	4.3%	27	1.3%	1	8.8%	8	0.9%	0	4.7%	6	4.7%	3	6.1%	6	2.1%	2
Weighted base:		633		98		97		37		132		59		96		114
Sample:		586		83		85		59		114		57		84		104

Column %ges.

Q32 At which town or location did you or your family last visit a restaurant?
Those who visit restaurants at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	3.0%	25	1.5%	2	0.9%	1	41.0%	19	0.3%	1	0.0%	0	1.4%	2	0.0%	0
Bedford	0.9%	8	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	5.7%	7	0.0%	0
Biggleswade	0.7%	6	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	3.0%	4	0.0%	0
Bishop's Stortford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Buntingford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Cambridge	7.6%	63	0.6%	1	0.4%	1	9.1%	4	34.7%	55	1.6%	1	0.5%	1	0.0%	0
Central London	6.2%	51	12.4%	16	3.9%	5	2.5%	1	3.8%	6	2.7%	2	1.9%	2	11.6%	18
Harpenden	6.5%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	33.9%	53
Hatfield	1.5%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.5%	6	0.0%	0	4.4%	7
Hemel Hempstead	0.3%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	1.2%	2
Hertford	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	2	0.0%	0	0.0%	0
Hitchin	24.6%	203	68.9%	86	15.9%	22	14.3%	7	1.9%	3	30.2%	22	42.4%	53	6.1%	10
Letchworth Garden City	13.6%	112	3.9%	5	62.4%	85	8.9%	4	1.9%	3	0.7%	0	12.1%	15	0.0%	0
Luton	2.6%	21	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	12.8%	20
Milton Keynes	1.5%	12	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	2.1%	3	5.9%	9
Royston	5.1%	42	0.0%	0	0.0%	0	0.0%	0	26.6%	42	0.0%	0	0.0%	0	0.0%	0
St Albans	1.3%	11	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1	0.0%	0	6.1%	10
Stevenage	5.6%	46	5.7%	7	4.3%	6	2.8%	1	6.6%	10	20.0%	15	3.1%	4	1.5%	2
The Galleria, Hatfield	0.2%	2	0.9%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Welwyn Garden City	1.8%	14	0.0%	0	1.4%	2	0.7%	0	0.0%	0	14.4%	11	0.8%	1	0.4%	1
Abroad	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.4%	1
Ashwell	0.1%	1	0.0%	0	0.0%	0	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Barley	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.1%	2	0.0%	0	0.0%	0	0.0%	0
Barton	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Bassingbourn cum Kneesworth	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Birmingham	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Bury St Edmunds	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Chester	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Clifton	0.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	3	0.0%	0
Clophill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Codicote	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Coleman Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Croydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Dunstable	0.2%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.2%	2
Enfield	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Graveley	0.3%	2	0.0%	0	1.3%	2	0.9%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Great Chishill	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Guiseley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Heacham	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0
Henlow	0.8%	6	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.5%	6	0.0%	0
Hexton	0.2%	2	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.4%	1
Heydon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.0%	0	0.0%	0
Hoddesdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Huntingdon	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Ickleford	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Knebworth	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.9%	1	0.0%	0	0.0%	0
Leighton Buzzard	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Lemsford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Lincoln	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Little Wymondley	0.1%	1	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Liverpool	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0
Marston Moretaine	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.4%	1
Melbourn	0.8%	6	0.0%	0	0.0%	0	0.0%	0	4.0%	6	0.0%	0	0.0%	0	0.0%	0
Meldreth	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Newmarket	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Norton	0.2%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Nuthampstead	0.3%	2	0.0%	0	0.0%	0	0.0%	0	1.4%	2	0.0%	0	0.0%	0	0.0%	0
Perry Green	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
Peterborough	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Potterne	0.3%	2	0.0%	0	0.0%	0	3.0%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Preston	0.1%	1	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Reading	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0
Saffron Walden	0.2%	2	0.0%	0	0.0%	0	0.0%	0	1.2%	2	0.0%	0	0.0%	0	0.0%	0
Shefford	1.6%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	10.5%	13	0.0%	0
Shillington	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Stamford	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0
Stopsley	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.7%	1
Stotfold	0.2%	2	0.0%	0	0.9%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Sutton	0.0%	0	0.0%	0	0.0%	0	0.7%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Therfield	0.3%	3	0.0%	0	0.0%	0	1.6%	1	1.2%	2	0.0%	0	0.0%	0	0.0%	0

Column %ges.

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Thriplow	0.1%	1	0.0%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0
Todds Green	0.2%	1	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Weston	0.3%	3	0.0%	0	1.4%	2	1.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Wheathampstead	1.4%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.6%	12
Willian	0.4%	3	0.0%	0	1.4%	2	0.0%	0	0.0%	0	1.4%	1	0.0%	0	0.0%	0
(Don't know / can't remember)	4.6%	38	1.9%	2	3.3%	4	9.3%	4	5.1%	8	10.0%	7	4.0%	5	3.8%	6
Weighted base:		824		125		136		47		159		74		126		157
Sample:		801		116		122		75		143		84		114		147

Q33 At which town or location did you or your family last visit a nightclub / live music venue?
Those who visit nightclubs / live music venues at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Bedford	6.0%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	26.9%	6	0.0%	0
Cambridge	21.6%	23	0.0%	0	45.1%	7	0.0%	0	78.9%	16	0.0%	0	0.0%	0	0.0%	0
Central London	24.6%	26	47.3%	8	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.3%	6	44.3%	13
Hatfield	1.8%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	2	0.0%	0	0.0%	0
Hitchin	11.9%	13	52.7%	9	4.9%	1	100.0%	0	0.0%	0	0.0%	0	11.3%	3	0.0%	0
Luton	2.4%	3	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	9.0%	3
Milton Keynes	5.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	24.3%	6	0.0%	0
Royston	2.0%	2	0.0%	0	0.0%	0	0.0%	0	10.6%	2	0.0%	0	0.0%	0	0.0%	0
St Albans	11.8%	13	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	44.3%	13
Stevenage	7.0%	8	0.0%	0	45.1%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.4%	1
Sheffield	0.7%	1	0.0%	0	4.9%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	5.0%	5	0.0%	0	0.0%	0	0.0%	0	10.6%	2	0.0%	0	13.2%	3	0.0%	0
Weighted base:		108		17		15		0		21		2		24		29
Sample:		34		5		4		1		7		1		8		8

Q34 At which town or location did you or your family last go to play bingo?
Those who visit for bingo at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Bedford	7.4%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	48.0%	2	0.0%	0
Biggleswade	6.6%	2	12.0%	1	0.0%	0	0.0%	0	0.0%	0	35.5%	1	12.0%	1	0.0%	0
Hertford	1.3%	0	0.0%	0	0.0%	0	100.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin	6.0%	2	9.8%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.3%	1	0.0%	0
Luton	25.0%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	35.5%	1	0.0%	0	77.1%	6
Stevenage	46.8%	13	78.2%	5	100.0%	5	0.0%	0	100.0%	2	28.9%	0	14.7%	1	0.0%	0
Dunstable	2.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	8.4%	1
(Don't know / can't remember)	4.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.4%	1
Weighted base:		28		6		5		0		2		2		4		8
Sample:		19		4		3		1		1		3		4		3

Q35 At which town or location did you or your family last go to a healthclub / gym?
Those who visit healthclubs / gyms at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Baldock	1.7%	6	0.0%	0	2.3%	1	22.2%	4	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Bedford	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	4.4%	2	0.0%	0
Biggleswade	4.5%	15	0.0%	0	0.0%	0	21.0%	4	0.0%	0	0.0%	0	21.8%	11	0.0%	0
Bishop's Stortford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Cambridge	2.4%	8	0.0%	0	0.0%	0	0.0%	0	11.3%	8	0.0%	0	0.0%	0	0.0%	0
Central London	2.6%	9	4.6%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	6
Harpenden	3.7%	12	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	26.0%	12
Hatfield	0.5%	2	0.0%	0	0.0%	0	1.9%	0	0.0%	0	0.0%	0	0.0%	0	3.1%	1
Hemel Hempstead	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.5%	1
Hitchin	17.3%	58	64.4%	32	17.9%	11	1.9%	0	0.0%	0	28.8%	11	7.4%	4	0.0%	0
Letchworth Garden City	23.4%	78	25.1%	13	73.8%	43	38.4%	7	4.0%	3	1.7%	1	21.9%	11	0.0%	0
Luton	2.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1	17.9%	8
Royston	14.8%	49	0.0%	0	0.0%	0	0.0%	0	68.3%	49	0.0%	0	0.0%	0	0.0%	0
St Albans	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	4.2%	2
Stevenage	9.4%	31	5.8%	3	4.7%	3	0.0%	0	0.9%	1	32.9%	12	25.4%	13	0.0%	0
Welwyn Garden City	0.8%	3	0.0%	0	0.0%	0	6.2%	1	0.0%	0	4.2%	2	0.0%	0	0.0%	0
Bradbury	0.1%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Clavering	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0	0.0%	0
Codicote	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.7%	1	0.0%	0	0.0%	0
Dunstable	1.9%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.0%	6
Flitwick	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0
Graveley	0.4%	1	0.0%	0	1.3%	1	0.0%	0	0.0%	0	1.3%	0	0.0%	0	0.0%	0
Henlow	1.0%	3	0.0%	0	0.0%	0	0.0%	0	0.8%	1	0.0%	0	5.3%	3	0.0%	0
Knebworth	2.6%	9	0.0%	0	0.0%	0	0.0%	0	0.0%	0	23.7%	9	0.0%	0	0.0%	0
Melbourn	2.4%	8	0.0%	0	0.0%	0	0.0%	0	11.2%	8	0.0%	0	0.0%	0	0.0%	0
Sandridge	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Shefford	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Stopsley	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.6%	1
Stotfold	1.4%	5	0.0%	0	0.0%	0	2.3%	0	0.0%	0	0.0%	0	8.1%	4	0.0%	0
(Don't know / can't remember)	2.9%	10	0.0%	0	0.0%	0	6.2%	1	1.6%	1	1.3%	0	1.3%	1	14.0%	6
Weighted base:		333		50		59		19		72		37		51		45
Sample:		261		37		45		24		51		35		38		31

Q36 At which town or location did you or your family last go for tenpin bowling?
Those who visit for tenpin bowling at Q28:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Bedford	0.5%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.7%	1	0.0%	0
Cambridge	11.7%	29	0.0%	0	4.1%	1	0.0%	0	48.1%	27	0.0%	0	0.0%	0	0.0%	0
Central London	1.1%	3	6.4%	2	0.0%	0	3.8%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Luton	2.4%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	13.6%	6
Milton Keynes	0.7%	2	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.7%	2	0.0%	0
Royston	0.5%	1	0.0%	0	0.0%	0	0.0%	0	2.0%	1	0.0%	0	0.0%	0	0.0%	0
St Albans	2.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	6
Stevenage	69.7%	172	93.6%	34	89.5%	28	96.2%	11	45.8%	26	97.0%	20	91.3%	43	23.3%	10
The Galleria, Hatfield	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	3.0%	1	0.0%	0	0.0%	0
Watford	3.4%	8	0.0%	0	2.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	18.0%	8
Braintree	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Chelmsford	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Cleethorpes	0.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.0%	0
Dunstable	2.5%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.2%	6
Huntingdon	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	2.3%	1	0.0%	0
Leominster	0.2%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Lowestoft	0.2%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	1.3%	1
Weybourne, Norfolk	0.5%	1	0.0%	0	4.1%	1	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know / can't remember)	2.6%	6	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.8%	6
Weighted base:		246		37		31		11		57		20		47		43
Sample:		186		26		24		16		41		18		39		22

Q37 What things, if any, do you regularly buy on the Internet? [MR]

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Groceries	11.3%	113	5.3%	8	8.3%	13	12.5%	8	15.3%	29	12.8%	12	16.7%	27	8.5%	16
Clothes and shoes	26.3%	263	19.0%	28	21.1%	34	22.4%	14	27.4%	53	25.1%	24	27.0%	43	36.4%	68
Domestic electrical appliances	9.9%	99	2.4%	4	2.4%	4	15.9%	10	15.9%	31	11.2%	11	14.7%	23	9.2%	17
Electrical TV, Hi-Fi and computers	12.7%	128	9.9%	15	8.4%	13	9.9%	6	22.6%	43	11.2%	11	15.7%	25	7.8%	15
Furniture, soft furnishings and floor coverings	1.6%	16	0.4%	1	2.0%	3	0.0%	0	2.4%	5	2.8%	3	0.7%	1	1.9%	4
DIY, hardware and homewares	6.7%	67	1.7%	3	3.4%	5	9.5%	6	7.7%	15	9.5%	9	8.4%	13	8.8%	16
Health and beauty, chemist items	4.6%	46	0.9%	1	7.4%	12	0.0%	0	5.6%	11	3.2%	3	8.6%	14	2.7%	5
Books, CDs, toys etc.	38.2%	383	36.0%	53	30.6%	49	39.9%	25	40.4%	77	44.0%	43	31.7%	51	46.1%	86
Travel goods (tickets, holidays etc.)	0.9%	9	0.8%	1	0.8%	1	0.6%	0	0.7%	1	0.0%	0	1.1%	2	1.6%	3
Computer software / electronic games	2.1%	21	2.5%	4	3.6%	6	3.2%	2	1.6%	3	2.0%	2	1.5%	2	1.0%	2
Other	1.6%	16	2.0%	3	0.8%	1	1.8%	1	1.9%	4	0.0%	0	0.0%	0	4.0%	7
Gardening items	0.2%	2	0.0%	0	0.0%	0	0.7%	0	0.3%	1	0.0%	0	0.0%	0	0.6%	1
Gifts	2.1%	21	1.0%	1	0.0%	0	4.8%	3	3.4%	7	7.4%	7	0.4%	1	1.3%	2
Hobby / craft items	2.5%	25	0.0%	0	0.8%	1	0.6%	0	5.1%	10	0.0%	0	1.7%	3	5.8%	11
Ink cartridges	0.7%	7	0.4%	1	0.0%	0	0.6%	0	0.4%	1	0.0%	0	3.6%	6	0.0%	0
Musical instruments / equipment	0.3%	3	0.0%	0	0.0%	0	2.3%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1
Pet food / supplies	3.7%	37	1.0%	1	0.9%	1	11.2%	7	0.6%	1	2.7%	3	12.6%	20	1.9%	4
Sports goods / equipment	1.5%	15	1.6%	2	0.0%	0	0.7%	0	4.4%	8	0.0%	0	1.7%	3	0.6%	1
Stationery	0.2%	2	0.4%	1	0.5%	1	0.7%	0	0.0%	0	0.0%	0	0.3%	1	0.0%	0
Vehicle parts / accessories	0.6%	6	0.8%	1	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.8%	1	0.6%	1
(Nothing)	32.7%	328	48.7%	72	46.9%	75	41.4%	25	18.4%	35	27.5%	27	28.6%	46	25.9%	48
(Don't know / can't remember / varies)	2.4%	24	0.9%	1	1.5%	2	2.9%	2	2.6%	5	2.1%	2	0.9%	1	5.2%	10
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

GEN Gender:

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Male	33.9%	340	43.2%	64	37.7%	60	36.7%	23	27.4%	52	32.6%	32	34.9%	56	29.2%	54
Female	66.1%	663	56.8%	84	62.3%	100	63.3%	39	72.6%	139	67.4%	65	65.1%	104	70.8%	132
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

AGE How old are you?

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
18-24	9.9%	100	8.9%	13	12.8%	20	0.0%	0	6.5%	12	5.7%	6	18.2%	29	10.2%	19
25-34	10.0%	101	8.9%	13	4.3%	7	12.9%	8	9.7%	19	17.2%	17	3.6%	6	17.0%	32
35-44	18.7%	188	17.5%	26	13.6%	22	25.2%	15	24.2%	46	22.4%	22	27.1%	43	7.3%	14
45-54	18.3%	184	13.2%	19	18.6%	30	18.3%	11	20.2%	39	13.8%	13	25.4%	41	16.4%	30
55-64	17.9%	179	19.2%	28	24.7%	40	15.7%	10	18.8%	36	14.0%	14	9.5%	15	19.8%	37
65+	22.1%	222	27.8%	41	23.9%	38	26.9%	17	17.3%	33	24.0%	23	14.2%	23	25.4%	47
(Refused)	3.0%	30	4.4%	7	2.1%	3	1.1%	1	3.2%	6	2.9%	3	1.8%	3	4.0%	7
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

PC Postcode

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
AL4 8	5.1%	51	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	27.5%	51
AL5 5	5.9%	59	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	31.8%	59
LU2 8	4.8%	48	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.7%	48
LU2 9	2.8%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.1%	28
SG1 6	0.7%	7	0.0%	0	0.0%	0	0.0%	0	0.0%	0	7.1%	7	0.0%	0	0.0%	0
SG156	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.3%	18	0.0%	0
SG166	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	14.9%	24	0.0%	0
SG175	7.5%	75	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	47.2%	75	0.0%	0
SG3 6	4.1%	41	0.0%	0	0.0%	0	0.0%	0	0.0%	0	42.7%	41	0.0%	0	0.0%	0
SG4 0	3.3%	33	22.7%	33	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG4 7	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.2%	24	0.0%	0	0.0%	0
SG4 8	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	25.0%	24	0.0%	0	0.0%	0
SG4 9	2.3%	23	15.9%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG5 1	3.1%	31	21.0%	31	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG5 2	5.9%	60	40.4%	60	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG5 3	2.4%	24	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	15.4%	24	0.0%	0
SG5 4	1.8%	18	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	11.2%	18	0.0%	0
SG6 1	3.8%	39	0.0%	0	24.1%	39	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG6 2	4.4%	44	0.0%	0	27.5%	44	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG6 3	2.3%	23	0.0%	0	14.6%	23	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG6 4	5.4%	54	0.0%	0	33.8%	54	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG7 5	2.8%	28	0.0%	0	0.0%	0	45.3%	28	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG7 6	3.4%	34	0.0%	0	0.0%	0	54.7%	34	0.0%	0	0.0%	0	0.0%	0	0.0%	0
SG8 0	2.5%	25	0.0%	0	0.0%	0	0.0%	0	13.3%	25	0.0%	0	0.0%	0	0.0%	0
SG8 5	3.6%	36	0.0%	0	0.0%	0	0.0%	0	18.6%	36	0.0%	0	0.0%	0	0.0%	0
SG8 6	2.9%	29	0.0%	0	0.0%	0	0.0%	0	15.1%	29	0.0%	0	0.0%	0	0.0%	0
SG8 7	3.3%	33	0.0%	0	0.0%	0	0.0%	0	17.4%	33	0.0%	0	0.0%	0	0.0%	0
SG8 8	3.2%	32	0.0%	0	0.0%	0	0.0%	0	16.7%	32	0.0%	0	0.0%	0	0.0%	0
SG8 9	2.0%	20	0.0%	0	0.0%	0	0.0%	0	10.7%	20	0.0%	0	0.0%	0	0.0%	0
SG9 0	1.6%	16	0.0%	0	0.0%	0	0.0%	0	8.3%	16	0.0%	0	0.0%	0	0.0%	0
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

QUOTA Zone

	Total		Zone 1		Zone 2		Zone 3		Zone 4		Zone 5		Zone 6		Zone 7	
Zone 1	14.7%	147	100.0%	147	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 2	16.0%	160	0.0%	0	100.0%	160	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 3	6.1%	62	0.0%	0	0.0%	0	100.0%	62	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Zone 4	19.1%	192	0.0%	0	0.0%	0	0.0%	0	100.0%	192	0.0%	0	0.0%	0	0.0%	0
Zone 5	9.7%	97	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	97	0.0%	0	0.0%	0
Zone 6	15.9%	159	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	159	0.0%	0
Zone 7	18.6%	186	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	100.0%	186
Weighted base:		1003		147		160		62		192		97		159		186
Sample:		1003		141		150		100		180		100		152		180

Appendix 7 In-Street Survey Results

North Hertfordshire In Centre Survey
for Nathaniel Lichfield & Partners

Q01 What is the main purpose of your visit to (STUDY CENTRE) ?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Shopping for food only	14.0%	84	15.2%	34	13.3%	50	14.4%	18	10.6%	24	17.0%	42	12.8%	41	15.7%	43	12.0%	12	12.9%	26	17.7%	35	11.1%	11
Shopping for non-food goods only	14.9%	89	11.7%	26	16.8%	63	12.8%	16	15.0%	34	15.8%	39	18.1%	58	10.6%	29	10.0%	10	16.4%	33	20.2%	40	6.1%	6
Shopping for both food & non-food items	14.0%	84	10.8%	24	16.0%	60	8.8%	11	13.3%	30	17.4%	43	14.3%	46	13.9%	38	7.0%	7	14.4%	29	16.7%	33	15.2%	15
Window shopping	2.7%	16	2.7%	6	2.7%	10	1.6%	2	2.2%	5	3.6%	9	2.5%	8	2.9%	8	2.0%	2	4.5%	9	2.0%	4	1.0%	1
To visit the market	2.2%	13	3.1%	7	1.6%	6	0.8%	1	2.2%	5	2.8%	7	1.6%	5	2.9%	8	4.0%	4	1.0%	2	0.0%	0	7.1%	7
To visit a restaurant / café / public house	7.7%	46	11.2%	25	5.6%	21	14.4%	18	4.4%	10	7.3%	18	5.0%	16	10.9%	30	9.0%	9	6.0%	12	4.5%	9	16.2%	16
To have a walk / stroll around	4.0%	24	3.6%	8	4.3%	16	4.8%	6	3.1%	7	4.5%	11	3.4%	11	4.7%	13	8.0%	8	3.5%	7	2.0%	4	5.1%	5
To use services (e.g. bank, post office, hairdressers)	15.1%	90	14.8%	33	15.2%	57	15.2%	19	16.8%	38	13.4%	33	17.8%	57	11.7%	32	22.0%	22	15.4%	31	10.6%	21	16.2%	16
Work / business purposes	9.9%	59	11.2%	25	9.1%	34	12.8%	16	15.0%	34	3.6%	9	10.0%	32	9.9%	27	6.0%	6	9.0%	18	11.6%	23	12.1%	12
Healthcare (e.g. doctor, dentist, optician)	5.7%	34	6.7%	15	5.1%	19	2.4%	3	5.8%	13	7.3%	18	5.6%	18	5.8%	16	8.0%	8	6.0%	12	5.1%	10	4.0%	4
Social / leisure reason (e.g. meeting friends, going to gym)	8.2%	49	6.7%	15	9.1%	34	8.8%	11	11.1%	25	5.3%	13	6.9%	22	9.9%	27	10.0%	10	8.5%	17	8.1%	16	6.1%	6
Tourism (e.g. holiday, day trip)	0.7%	4	0.9%	2	0.5%	2	0.0%	0	0.0%	0	1.6%	4	0.6%	2	0.7%	2	2.0%	2	1.0%	2	0.0%	0	0.0%	0
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Education reasons	0.3%	2	0.0%	0	0.5%	2	1.6%	2	0.0%	0	0.0%	0	0.3%	1	0.4%	1	0.0%	0	0.5%	1	0.5%	1	0.0%	0
School run	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
(Nothing/Nothing else)	0.3%	2	0.9%	2	0.0%	0	1.6%	2	0.0%	0	0.0%	0	0.6%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.0%	0
(Don't know)	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q02 What else will you be doing here today? [MR]

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Shopping for food only	7.2%	43	7.2%	16	7.2%	27	10.4%	13	5.8%	13	6.9%	17	9.3%	30	4.7%	13	11.0%	11	9.0%	18	4.5%	9	5.1%	5
Shopping for non-food goods only	7.9%	47	6.3%	14	8.8%	33	8.8%	11	5.3%	12	9.7%	24	11.5%	37	3.7%	10	8.0%	8	12.4%	25	5.1%	10	4.0%	4
Shopping for both food & non-food items	5.0%	30	4.0%	9	5.6%	21	7.2%	9	6.6%	15	2.4%	6	5.3%	17	4.7%	13	2.0%	2	5.5%	11	7.1%	14	3.0%	3
Window shopping	4.3%	26	2.7%	6	5.3%	20	4.8%	6	5.3%	12	3.2%	8	3.7%	12	5.1%	14	5.0%	5	6.5%	13	2.5%	5	3.0%	3
To visit the market	2.5%	15	1.8%	4	2.9%	11	4.0%	5	2.7%	6	1.6%	4	2.2%	7	2.9%	8	3.0%	3	1.0%	2	0.5%	1	9.1%	9
To visit a restaurant / café / public house	9.2%	55	8.5%	19	9.6%	36	8.0%	10	9.3%	21	9.7%	24	9.7%	31	8.8%	24	20.0%	20	7.0%	14	8.1%	16	5.1%	5
To have a walk / stroll around	6.5%	39	6.7%	15	6.4%	24	5.6%	7	8.0%	18	5.7%	14	3.7%	12	9.9%	27	6.0%	6	5.5%	11	4.5%	9	13.1%	13
To use services (e.g. bank, post office, hairdressers)	10.0%	60	11.2%	25	9.3%	35	6.4%	8	8.9%	20	13.0%	32	9.0%	29	11.3%	31	12.0%	12	9.5%	19	7.6%	15	14.1%	14
Work / business purposes	0.7%	4	0.4%	1	0.8%	3	0.0%	0	0.9%	2	0.8%	2	0.9%	3	0.4%	1	1.0%	1	0.5%	1	0.5%	1	1.0%	1
Healthcare (e.g. doctor, dentist, optician)	3.2%	19	2.2%	5	3.7%	14	3.2%	4	3.1%	7	3.2%	8	1.6%	5	5.1%	14	1.0%	1	3.5%	7	3.0%	6	5.1%	5
Social / leisure reason (e.g. meeting friends, going to gym)	3.8%	23	2.2%	5	4.8%	18	2.4%	3	4.0%	9	4.5%	11	4.1%	13	3.3%	9	3.0%	3	6.0%	12	3.0%	6	2.0%	2
Tourism (e.g. holiday, day trip)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Nothing/Nothing else)	41.1%	246	48.4%	108	36.8%	138	41.6%	52	39.4%	89	42.5%	105	42.4%	136	39.4%	108	32.0%	32	34.3%	69	52.5%	104	41.4%	41
(Don't know)	3.7%	22	3.6%	8	3.7%	14	4.8%	6	4.9%	11	2.0%	5	2.8%	9	4.7%	13	5.0%	5	2.0%	4	4.5%	9	4.0%	4
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q03 Do you intend to do any shopping in (STUDY CENTRE) today ?
Those who did not mention shopping for food, non food or both at Q01 or Q02

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Yes	29.3%	71	21.4%	22	35.3%	49	22.0%	11	25.5%	27	38.4%	33	31.5%	34	27.8%	37	23.1%	12	46.4%	32	26.2%	17	17.9%	10
No	63.2%	153	72.8%	75	56.1%	78	68.0%	34	67.0%	71	55.8%	48	58.3%	63	66.9%	89	71.2%	37	43.5%	30	63.1%	41	80.4%	45
(Don't know)	7.4%	18	5.8%	6	8.6%	12	10.0%	5	7.5%	8	5.8%	5	10.2%	11	5.3%	7	5.8%	3	10.1%	7	10.8%	7	1.8%	1
Base:		242		103		139		50		106		86		108		133		52		69		65		56

Q04 Do you intend to shop at the Tesco store in Baldock today ?
Those who are in Baldock

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Yes	36.0%	36	31.6%	12	38.7%	24	60.0%	12	31.6%	12	28.6%	12	33.3%	16	38.5%	20	36.0%	36	0.0%	0	0.0%	0	0.0%	0
No	26.0%	26	26.3%	10	25.8%	16	15.0%	3	31.6%	12	26.2%	11	41.7%	20	11.5%	6	26.0%	26	0.0%	0	0.0%	0	0.0%	0
(Don't know)	38.0%	38	42.1%	16	35.5%	22	25.0%	5	36.8%	14	45.2%	19	25.0%	12	50.0%	26	38.0%	38	0.0%	0	0.0%	0	0.0%	0
Base:		100		38		62		20		38		42		48		52		100		0		0		0

Q05 What do you intend to buy in (STUDY CENTRE) today ? [MR]
Those who are shopping at Q01,Q02 or Q03

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Food and groceries	63.9%	273	66.2%	94	62.8%	179	62.8%	54	62.6%	92	65.5%	127	60.7%	150	69.1%	123	61.7%	37	62.2%	102	68.7%	103	58.5%	31
Newspapers / magazines	11.9%	51	16.9%	24	9.5%	27	10.5%	9	9.5%	14	14.4%	28	10.5%	26	14.0%	25	16.7%	10	9.1%	15	10.0%	15	20.8%	11
Confectionery / tobacco	5.2%	22	3.5%	5	6.0%	17	5.8%	5	6.1%	9	4.1%	8	4.0%	10	6.7%	12	8.3%	5	3.0%	5	2.0%	3	17.0%	9
Clothing / footwear	18.3%	78	11.3%	16	21.8%	62	22.1%	19	19.7%	29	15.5%	30	19.4%	48	16.3%	29	6.7%	4	22.6%	37	20.7%	31	11.3%	6
Furniture / carpets / soft furnishings	1.9%	8	2.8%	4	1.4%	4	1.2%	1	2.7%	4	1.5%	3	1.6%	4	2.2%	4	6.7%	4	1.2%	2	1.3%	2	0.0%	0
Domestic electrical goods	1.6%	7	0.7%	1	2.1%	6	0.0%	0	4.1%	6	0.5%	1	2.0%	5	1.1%	2	5.0%	3	0.6%	1	0.7%	1	3.8%	2
Other electrical goods (TV, Hi-fi etc)	0.9%	4	2.1%	3	0.4%	1	2.3%	2	0.0%	0	1.0%	2	1.6%	4	0.0%	0	1.7%	1	1.2%	2	0.7%	1	0.0%	0
DIY / hardware / gardening	4.7%	20	4.2%	6	4.9%	14	5.8%	5	1.4%	2	6.7%	13	4.0%	10	5.6%	10	3.3%	2	4.3%	7	2.7%	4	13.2%	7
Other household goods	8.9%	38	7.0%	10	9.8%	28	10.5%	9	8.8%	13	8.2%	16	9.7%	24	7.9%	14	5.0%	3	11.6%	19	9.3%	14	3.8%	2
Gifts / jewellery / china and glass	7.7%	33	6.3%	9	8.4%	24	5.8%	5	9.5%	14	7.2%	14	9.7%	24	3.9%	7	0.0%	0	13.4%	22	5.3%	8	5.7%	3
Books / CD's / videos / toys / hobbies	4.0%	17	5.6%	8	3.2%	9	5.8%	5	2.7%	4	4.1%	8	4.0%	10	3.9%	7	0.0%	0	4.3%	7	4.7%	7	5.7%	3
Health / beauty / chemist items	14.1%	60	10.6%	15	15.8%	45	10.5%	9	16.3%	24	13.9%	27	11.3%	28	18.0%	32	5.0%	3	14.6%	24	13.3%	20	24.5%	13
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Pet products	0.5%	2	0.7%	1	0.4%	1	0.0%	0	0.7%	1	0.5%	1	0.0%	0	1.1%	2	0.0%	0	0.6%	1	0.7%	1	0.0%	0
Stationery	4.0%	17	3.5%	5	4.2%	12	2.3%	2	3.4%	5	5.2%	10	4.5%	11	3.4%	6	3.3%	2	4.9%	8	3.3%	5	3.8%	2
(Don't know)	7.0%	30	7.7%	11	6.7%	19	8.1%	7	9.5%	14	4.6%	9	7.3%	18	6.7%	12	15.0%	9	3.7%	6	6.0%	9	11.3%	6
Base:		427		142		285		86		147		194		247		178		60		164		150		53

Meanscore[£]

Q06 Approximately how much will you spend in total on each of the following during your visit to (STUDY CENTRE) today ?
Those who are shopping at Q01,Q02 or Q03

Food & Grocery

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing	18.7%	80	19.0%	27	18.6%	53	18.6%	16	21.1%	31	17.0%	33	20.6%	51	15.7%	28	21.7%	13	18.3%	30	19.3%	29	15.1%	8
Less than £5.00	8.4%	36	12.7%	18	6.3%	18	9.3%	8	3.4%	5	11.9%	23	10.1%	25	6.2%	11	16.7%	10	5.5%	9	9.3%	14	5.7%	3
£5.01-£10.00	11.7%	50	10.6%	15	12.3%	35	12.8%	11	15.6%	23	8.2%	16	12.6%	31	10.7%	19	11.7%	7	13.4%	22	10.0%	15	11.3%	6
£10.01-£20.00	19.9%	85	19.7%	28	20.0%	57	19.8%	17	17.7%	26	21.6%	42	20.2%	50	19.7%	35	21.7%	13	20.7%	34	19.3%	29	17.0%	9
£20.01-£30.00	10.1%	43	7.0%	10	11.6%	33	15.1%	13	6.8%	10	10.3%	20	6.1%	15	15.7%	28	6.7%	4	12.8%	21	8.7%	13	9.4%	5
£30.01-£40.00	7.0%	30	4.9%	7	8.1%	23	3.5%	3	7.5%	11	8.2%	16	4.0%	10	11.2%	20	5.0%	3	6.7%	11	7.3%	11	9.4%	5
£40.01-£50.00	4.2%	18	4.9%	7	3.9%	11	3.5%	3	5.4%	8	3.6%	7	3.6%	9	5.1%	9	3.3%	2	1.8%	3	5.3%	8	9.4%	5
£50.01-£75.00	3.5%	15	4.2%	6	3.2%	9	2.3%	2	4.1%	6	3.6%	7	3.2%	8	3.9%	7	1.7%	1	1.8%	3	6.0%	9	3.8%	2
£75.01-£100.00	2.3%	10	3.5%	5	1.8%	5	2.3%	2	4.8%	7	0.5%	1	3.2%	8	1.1%	2	1.7%	1	3.0%	5	2.0%	3	1.9%	1
£100.01-£150.00	0.9%	4	0.0%	0	1.4%	4	1.2%	1	1.4%	2	0.5%	1	1.2%	3	0.6%	1	0.0%	0	0.0%	0	2.0%	3	1.9%	1
More than £150.00	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	13.1%	56	13.4%	19	13.0%	37	11.6%	10	12.2%	18	14.4%	28	15.0%	37	10.1%	18	10.0%	6	15.9%	26	10.7%	16	15.1%	8
Mean:		*18.83*		*17.89*		*19.30*		*17.73*		*21.76*		*17.06*		*17.86*		*20.23*		*13.29*		*17.16*		*21.29*		*23.33*
Base:		427		142		285		86		147		194		247		178		60		164		150		53

Non-food

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing	20.1%	86	26.1%	37	17.2%	49	25.6%	22	16.3%	24	20.6%	40	16.6%	41	25.3%	45	31.7%	19	10.4%	17	23.3%	35	28.3%	15
Less than £5.00	12.9%	55	15.5%	22	11.6%	33	9.3%	8	9.5%	14	17.0%	33	13.0%	32	12.9%	23	16.7%	10	9.8%	16	13.3%	20	17.0%	9
£5.01-£10.00	9.8%	42	11.3%	16	9.1%	26	5.8%	5	10.2%	15	11.3%	22	10.1%	25	9.6%	17	15.0%	9	9.8%	16	9.3%	14	5.7%	3
£10.01-£20.00	14.5%	62	12.0%	17	15.8%	45	19.8%	17	15.0%	22	11.9%	23	13.4%	33	15.7%	28	10.0%	6	14.0%	23	16.7%	25	15.1%	8
£20.01-£30.00	10.8%	46	7.7%	11	12.3%	35	11.6%	10	10.9%	16	10.3%	20	9.3%	23	12.9%	23	5.0%	3	14.6%	24	11.3%	17	3.8%	2
£30.01-£40.00	4.9%	21	5.6%	8	4.6%	13	8.1%	7	6.1%	9	2.6%	5	5.3%	13	4.5%	8	1.7%	1	4.3%	7	8.0%	12	1.9%	1
£40.01-£50.00	5.2%	22	0.7%	1	7.4%	21	3.5%	3	7.5%	11	4.1%	8	6.1%	15	3.9%	7	3.3%	2	7.3%	12	2.0%	3	9.4%	5
£50.01-£75.00	1.9%	8	2.8%	4	1.4%	4	1.2%	1	2.7%	4	1.5%	3	2.8%	7	0.6%	1	0.0%	0	2.4%	4	2.7%	4	0.0%	0
£75.01-£100.00	0.9%	4	0.0%	0	1.4%	4	1.2%	1	1.4%	2	0.5%	1	0.8%	2	1.1%	2	0.0%	0	1.2%	2	0.7%	1	1.9%	1
£100.01-£150.00	1.4%	6	2.1%	3	1.1%	3	1.2%	1	0.7%	1	2.1%	4	1.6%	4	1.1%	2	0.0%	0	1.2%	2	2.0%	3	1.9%	1
More than £150.00	0.5%	2	0.0%	0	0.7%	2	0.0%	0	0.7%	1	0.5%	1	0.8%	2	0.0%	0	0.0%	0	0.6%	1	0.7%	1	0.0%	0
(Don't know)	16.9%	72	15.5%	22	17.5%	50	11.6%	10	19.0%	28	17.5%	34	19.8%	49	12.4%	22	16.7%	10	24.4%	40	9.3%	14	15.1%	8
(Refused)	0.2%	1	0.7%	1	0.0%	0	1.2%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.7%	1	0.0%	0
Mean:		*17.82*		*13.91*		*19.80*		*16.23*		*20.69*		*16.42*		*20.46*		*14.50*		*7.65*		*22.50*		*18.13*		*15.28*
Base:		427		142		285		86		147		194		247		178		60		164		150		53

Eating / drinking out

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing	43.8%	187	48.6%	69	41.4%	118	44.2%	38	40.8%	60	45.9%	89	43.7%	108	43.8%	78	43.3%	26	25.0%	41	60.7%	91	54.7%	29
Less than £5.00	14.3%	61	15.5%	22	13.7%	39	15.1%	13	15.6%	23	12.9%	25	10.9%	27	19.1%	34	21.7%	13	12.8%	21	13.3%	20	13.2%	7
£5.01-£10.00	12.6%	54	6.3%	9	15.8%	45	11.6%	10	14.3%	21	11.9%	23	10.9%	27	15.2%	27	11.7%	7	18.3%	30	10.7%	16	1.9%	1
£10.01-£20.00	4.9%	21	6.3%	9	4.2%	12	5.8%	5	6.1%	9	3.6%	7	4.0%	10	6.2%	11	13.3%	8	1.8%	3	2.0%	3	13.2%	7
£20.01-£30.00	2.3%	10	2.1%	3	2.5%	7	4.7%	4	2.0%	3	1.5%	3	2.4%	6	2.2%	4	1.7%	1	3.7%	6	0.7%	1	3.8%	2
£30.01-£40.00	1.2%	5	0.7%	1	1.4%	4	2.3%	2	1.4%	2	0.5%	1	1.6%	4	0.6%	1	0.0%	0	2.4%	4	0.7%	1	0.0%	0
£40.01-£50.00	0.2%	1	0.7%	1	0.0%	0	0.0%	0	0.7%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.6%	1	0.0%	0	0.0%	0
£50.01-£75.00	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£75.01-£100.00	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
£100.01-£150.00	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
More than £150.00	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	20.6%	88	19.7%	28	21.1%	60	16.3%	14	19.0%	28	23.7%	46	25.9%	64	12.9%	23	8.3%	5	35.4%	58	12.0%	18	13.2%	7
Mean:		*3.96*		*3.62*		*4.13*		*4.90*		*4.54*		*3.04*		*4.13*		*3.79*		*4.18*		*6.20*		*2.08*		*3.91*
Base:		427		142		285		86		147		194		247		178		60		164		150		53

Q07 Do you intend to visit any leisure / entertainment facilities or eat / drink in (STUDY CENTRE) today ?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Yes	35.6%	213	35.0%	78	36.0%	135	38.4%	48	36.3%	82	33.6%	83	33.3%	107	38.3%	105	30.0%	30	46.3%	93	30.3%	60	30.3%	30
No	62.7%	375	63.2%	141	62.4%	234	60.8%	76	61.1%	138	65.2%	161	65.1%	209	59.9%	164	69.0%	69	52.7%	106	66.7%	132	68.7%	68
(Don't know)	1.7%	10	1.8%	4	1.6%	6	0.8%	1	2.7%	6	1.2%	3	1.6%	5	1.8%	5	1.0%	1	1.0%	2	3.0%	6	1.0%	1
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q08 And what type of facilities do you intend to visit today ? [MR]

Those who intend to visit any leisure / entertainment facilities or eat / drink in (STUDY CENTRE) at Q07

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Sports facilities	3.3%	7	5.1%	4	2.2%	3	2.1%	1	4.9%	4	2.4%	2	3.7%	4	2.9%	3	10.0%	3	0.0%	0	5.0%	3	3.3%	1
Pubs / bars	15.5%	33	26.9%	21	8.9%	12	20.8%	10	18.3%	15	9.6%	8	9.3%	10	21.9%	23	23.3%	7	4.3%	4	15.0%	9	43.3%	13
Restaurants / café	70.0%	149	59.0%	46	76.3%	103	66.7%	32	67.1%	55	74.7%	62	75.7%	81	63.8%	67	63.3%	19	80.6%	75	71.7%	43	40.0%	12
Takeaway food	12.2%	26	5.1%	4	16.3%	22	12.5%	6	17.1%	14	7.2%	6	10.3%	11	14.3%	15	10.0%	3	12.9%	12	11.7%	7	13.3%	4
Walk about / look around	0.9%	2	2.6%	2	0.0%	0	0.0%	0	1.2%	1	1.2%	1	1.9%	2	0.0%	0	6.7%	2	0.0%	0	0.0%	0	0.0%	0
Theatre	0.5%	1	0.0%	0	0.7%	1	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Betting shop	0.9%	2	1.3%	1	0.7%	1	0.0%	0	0.0%	0	2.4%	2	1.9%	2	0.0%	0	6.7%	2	0.0%	0	0.0%	0	0.0%	0
Cinema	0.5%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.0%	0	1.0%	1	0.0%	0	1.1%	1	0.0%	0	0.0%	0
Library	0.5%	1	1.3%	1	0.0%	0	0.0%	0	0.0%	0	1.2%	1	0.9%	1	0.0%	0	3.3%	1	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.9%	2	0.0%	0	1.5%	2	0.0%	0	0.0%	0	2.4%	2	1.9%	2	0.0%	0	0.0%	0	2.2%	2	0.0%	0	0.0%	0
Base:		213		78		135		48		82		83		107		105		30		93		60		30

Q09 How did you travel to (STUDY CENTRE) today ?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Car-driver	49.3%	295	50.7%	113	48.5%	182	34.4%	43	61.1%	138	46.2%	114	50.8%	163	47.4%	130	42.0%	42	50.2%	101	61.1%	121	31.3%	31
Car-passenger	7.7%	46	3.6%	8	10.1%	38	12.8%	16	5.3%	12	7.3%	18	6.9%	22	8.8%	24	10.0%	10	5.0%	10	4.0%	8	18.2%	18
Bus / coach	8.5%	51	8.5%	19	8.5%	32	8.8%	11	8.4%	19	8.5%	21	5.9%	19	11.7%	32	0.0%	0	10.4%	21	8.6%	17	13.1%	13
Train / Tube	1.8%	11	1.8%	4	1.9%	7	4.0%	5	1.8%	4	0.8%	2	1.9%	6	1.8%	5	2.0%	2	1.5%	3	3.0%	6	0.0%	0
Taxi	1.3%	8	1.3%	3	1.3%	5	1.6%	2	0.9%	2	1.6%	4	0.9%	3	1.8%	5	1.0%	1	0.0%	0	2.0%	4	3.0%	3
Walked	29.6%	177	30.9%	69	28.8%	108	38.4%	48	22.1%	50	32.0%	79	32.7%	105	25.9%	71	42.0%	42	31.8%	64	19.2%	38	33.3%	33
Bicycle	1.5%	9	2.7%	6	0.8%	3	0.0%	0	0.4%	1	3.2%	8	0.9%	3	2.2%	6	2.0%	2	1.0%	2	2.0%	4	1.0%	1
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mobility scooter	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q10 At which bus stop in (STUDY CENTRE) did you arrive at today ? [MR]

Those who travelled by Bus / coach at Q09

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Baldock - High Street	5.9%	3	5.3%	1	6.3%	2	9.1%	1	10.5%	2	0.0%	0	10.5%	2	3.1%	1	0.0%	0	4.8%	1	5.9%	1	7.7%	1
Baldock - Hitchin Street	3.9%	2	10.5%	2	0.0%	0	0.0%	0	5.3%	1	4.8%	1	0.0%	0	6.3%	2	0.0%	0	9.5%	2	0.0%	0	0.0%	0
Baldock - Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin - Queen Street	3.9%	2	0.0%	0	6.3%	2	0.0%	0	5.3%	1	4.8%	1	5.3%	1	3.1%	1	0.0%	0	9.5%	2	0.0%	0	0.0%	0
Hitchin - Bancroft	17.6%	9	15.8%	3	18.8%	6	0.0%	0	26.3%	5	19.0%	4	21.1%	4	15.6%	5	0.0%	0	42.9%	9	0.0%	0	0.0%	0
Hitchin - Hermitage	11.8%	6	10.5%	2	12.5%	4	18.2%	2	0.0%	0	19.0%	4	10.5%	2	12.5%	4	0.0%	0	28.6%	6	0.0%	0	0.0%	0
Hitchin - Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Hitchin - High Street	2.0%	1	5.3%	1	0.0%	0	0.0%	0	0.0%	0	4.8%	1	0.0%	0	3.1%	1	0.0%	0	4.8%	1	0.0%	0	0.0%	0
Letchworth - Broadway	5.9%	3	10.5%	2	3.1%	1	9.1%	1	0.0%	0	9.5%	2	5.3%	1	6.3%	2	0.0%	0	0.0%	0	17.6%	3	0.0%	0
Letchworth - Gernon Road	2.0%	1	0.0%	0	3.1%	1	0.0%	0	0.0%	0	4.8%	1	0.0%	0	3.1%	1	0.0%	0	0.0%	0	5.9%	1	0.0%	0
Letchworth - Station Road	23.5%	12	26.3%	5	21.9%	7	27.3%	3	26.3%	5	19.0%	4	36.8%	7	15.6%	5	0.0%	0	0.0%	0	70.6%	12	0.0%	0
Letchworth - Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Royston - Baldock Street	15.7%	8	10.5%	2	18.8%	6	27.3%	3	10.5%	2	14.3%	3	0.0%	0	25.0%	8	0.0%	0	0.0%	0	0.0%	0	61.5%	8
Royston - Backway Street	3.9%	2	5.3%	1	3.1%	1	0.0%	0	10.5%	2	0.0%	0	5.3%	1	3.1%	1	0.0%	0	0.0%	0	0.0%	0	15.4%	2
Royston - Kneesworth Street	3.9%	2	0.0%	0	6.3%	2	9.1%	1	5.3%	1	0.0%	0	5.3%	1	3.1%	1	0.0%	0	0.0%	0	0.0%	0	15.4%	2
Royston - Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Base:		51		19		32		11		19		21		19		32		0		21		17		13

Q11 Which other shopping centres or towns do you use regularly, (i.e. at least every three months) ? [MR]

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
No other centre	15.2%	91	18.4%	41	13.3%	50	14.4%	18	10.6%	24	19.8%	49	14.0%	45	16.1%	44	3.0%	3	17.4%	35	17.7%	35	18.2%	18
Baldock	7.4%	44	7.2%	16	7.5%	28	5.6%	7	8.0%	18	7.7%	19	6.2%	20	8.8%	24	0.0%	0	5.5%	11	10.1%	20	13.1%	13
Bedford	8.2%	49	6.3%	14	9.3%	35	3.2%	4	10.6%	24	8.5%	21	6.2%	20	10.6%	29	4.0%	4	10.9%	22	9.6%	19	4.0%	4
Bishop’s Stortford	2.3%	14	2.2%	5	2.4%	9	1.6%	2	3.1%	7	2.0%	5	2.2%	7	2.6%	7	7.0%	7	0.0%	0	0.5%	1	6.1%	6
Cambridge	22.6%	135	23.3%	52	22.1%	83	26.4%	33	26.5%	60	17.0%	42	23.7%	76	21.5%	59	36.0%	36	10.9%	22	16.7%	33	44.4%	44
Central London	10.0%	60	9.4%	21	10.4%	39	13.6%	17	12.4%	28	6.1%	15	12.5%	40	7.3%	20	8.0%	8	9.0%	18	9.6%	19	15.2%	15
Hatfield	4.2%	25	3.1%	7	4.8%	18	3.2%	4	4.4%	10	4.5%	11	2.8%	9	5.8%	16	6.0%	6	3.5%	7	1.5%	3	9.1%	9
Hemel Hempstead	7.4%	44	4.5%	10	9.1%	34	9.6%	12	10.6%	24	3.2%	8	4.7%	15	10.6%	29	23.0%	23	1.0%	2	0.5%	1	18.2%	18
Hertford	3.2%	19	4.0%	9	2.7%	10	3.2%	4	1.8%	4	4.5%	11	1.6%	5	5.1%	14	6.0%	6	1.0%	2	0.5%	1	10.1%	10
Hitchin	19.6%	117	21.5%	48	18.4%	69	15.2%	19	21.7%	49	19.8%	49	20.9%	67	18.2%	50	36.0%	36	0.0%	0	35.9%	71	10.1%	10
Letchworth Garden City	25.1%	150	22.4%	50	26.7%	100	27.2%	34	24.8%	56	24.3%	60	23.4%	75	27.4%	75	66.0%	66	23.4%	47	0.0%	0	37.4%	37
Luton	7.0%	42	6.3%	14	7.5%	28	8.8%	11	7.5%	17	5.7%	14	5.6%	18	8.8%	24	4.0%	4	13.4%	27	4.5%	9	2.0%	2
Milton Keynes	12.0%	72	9.4%	21	13.6%	51	12.0%	15	17.7%	40	6.9%	17	12.8%	41	11.3%	31	15.0%	15	15.9%	32	6.1%	12	13.1%	13
Royston	7.2%	43	7.2%	16	7.2%	27	6.4%	8	8.9%	20	6.1%	15	4.7%	15	10.2%	28	33.0%	33	3.0%	6	2.0%	4	0.0%	0
St Albans	5.9%	35	4.9%	11	6.4%	24	6.4%	8	6.6%	15	4.9%	12	5.6%	18	6.2%	17	10.0%	10	6.5%	13	3.0%	6	6.1%	6
Stevenage	38.1%	228	35.0%	78	40.0%	150	42.4%	53	42.5%	96	32.0%	79	34.0%	109	43.4%	119	43.0%	43	29.4%	59	42.4%	84	42.4%	42
Waltham Abbey	3.2%	19	3.1%	7	3.2%	12	3.2%	4	3.5%	8	2.8%	7	0.9%	3	5.8%	16	12.0%	12	0.0%	0	0.0%	0	7.1%	7
Ware	0.5%	3	0.4%	1	0.5%	2	0.0%	0	0.4%	1	0.8%	2	0.0%	0	1.1%	3	1.0%	1	0.0%	0	0.0%	0	2.0%	2
Watford	1.5%	9	0.4%	1	2.1%	8	1.6%	2	1.8%	4	1.2%	3	0.9%	3	2.2%	6	3.0%	3	2.0%	4	0.5%	1	1.0%	1
Welwyn Garden City	11.9%	71	10.8%	24	12.5%	47	11.2%	14	8.4%	19	15.4%	38	13.7%	44	9.9%	27	14.0%	14	13.9%	28	9.1%	18	11.1%	11
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Aberystwyth	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
Berkhampstead	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Biggleswade	2.8%	17	3.1%	7	2.7%	10	2.4%	3	2.7%	6	3.2%	8	3.4%	11	2.2%	6	2.0%	2	3.5%	7	4.0%	8	0.0%	0
Brent Cross	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Bromborough	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Buntingford	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.0%	0	0.8%	2	0.6%	2	0.0%	0	2.0%	2	0.0%	0	0.0%	0	0.0%	0
Bury St Edmunds	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
Cheshunt	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Harlow	0.5%	3	0.4%	1	0.5%	2	0.0%	0	1.3%	3	0.0%	0	0.6%	2	0.4%	1	1.0%	1	1.0%	2	0.0%	0	0.0%	0
Harpenden	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Hoddesdon	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
Lakeside	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.3%	1	0.4%	1	0.0%	0	0.0%	0	1.0%	2	0.0%	0
London	0.5%	3	0.4%	1	0.5%	2	0.8%	1	0.9%	2	0.0%	0	0.6%	2	0.0%	0	0.0%	0	0.5%	1	1.0%	2	0.0%	0
Peterborough	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.4%	1	0.4%	1	0.0%	0	0.7%	2	0.0%	0	0.5%	1	0.5%	1	0.0%	0
Rainham	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.0%	0	0.7%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Saffron Walden	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
St Neots	1.0%	6	1.3%	3	0.8%	3	0.0%	0	0.4%	1	2.0%	5	1.2%	4	0.7%	2	1.0%	1	2.0%	4	0.5%	1	0.0%	0
Sutton	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
(Don’t know)	0.7%	4	0.4%	1	0.8%	3	0.0%	0	0.4%	1	1.2%	3	0.3%	1	1.1%	3	0.0%	0	1.5%	3	0.5%	1	0.0%	0
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q12 Approximately how much time will you spend in the shopping area in (STUDY CENTRE) today?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
0-15 minutes	4.3%	26	6.3%	14	3.2%	12	2.4%	3	5.8%	13	4.0%	10	5.3%	17	3.3%	9	9.0%	9	3.0%	6	4.0%	8	3.0%	3
16-30 minutes	11.4%	68	13.0%	29	10.4%	39	16.0%	20	9.7%	22	10.5%	26	13.4%	43	9.1%	25	13.0%	13	7.0%	14	17.7%	35	6.1%	6
31 minutes – under 1 hour	20.2%	121	21.1%	47	19.7%	74	13.6%	17	21.7%	49	22.3%	55	21.5%	69	18.6%	51	24.0%	24	18.9%	38	21.7%	43	16.2%	16
1 – 1 ½ hours	18.4%	110	19.7%	44	17.6%	66	21.6%	27	18.1%	41	17.0%	42	19.0%	61	17.9%	49	30.0%	30	13.4%	27	18.2%	36	17.2%	17
Over 1 ½ - 2 hours	14.4%	86	11.7%	26	16.0%	60	8.0%	10	13.3%	30	18.6%	46	15.3%	49	13.1%	36	10.0%	10	20.4%	41	10.6%	21	14.1%	14
Over 2-3 hours	15.9%	95	13.5%	30	17.3%	65	14.4%	18	15.0%	34	17.4%	43	13.1%	42	19.3%	53	6.0%	6	22.9%	46	18.2%	36	7.1%	7
Over 3 hours	12.4%	74	12.1%	27	12.5%	47	17.6%	22	13.3%	30	8.9%	22	10.9%	35	13.9%	38	7.0%	7	13.4%	27	8.6%	17	23.2%	23
(Don't know)	3.0%	18	2.7%	6	3.2%	12	6.4%	8	3.1%	7	1.2%	3	1.6%	5	4.7%	13	1.0%	1	1.0%	2	1.0%	2	13.1%	13
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q13 How often do you shop in (STUDY CENTRE) ?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Everyday	15.4%	92	22.4%	50	11.2%	42	17.6%	22	11.9%	27	17.4%	43	15.3%	49	15.7%	43	16.0%	16	15.9%	32	15.2%	30	14.1%	14
2-3 times a week	33.8%	202	29.6%	66	36.3%	136	30.4%	38	32.3%	73	36.8%	91	33.3%	107	34.3%	94	29.0%	29	34.3%	69	38.9%	77	27.3%	27
Once a week	25.1%	150	23.3%	52	26.1%	98	20.0%	25	28.3%	64	24.7%	61	27.7%	89	21.9%	60	22.0%	22	24.9%	50	24.2%	48	30.3%	30
Once a fortnight	10.9%	65	10.8%	24	10.9%	41	16.0%	20	11.9%	27	7.3%	18	9.0%	29	12.8%	35	12.0%	12	9.0%	18	11.1%	22	13.1%	13
Once a month	6.7%	40	6.7%	15	6.7%	25	7.2%	9	8.0%	18	5.3%	13	6.9%	22	6.6%	18	11.0%	11	8.5%	17	1.5%	3	9.1%	9
Less than once a month	6.0%	36	4.9%	11	6.7%	25	6.4%	8	5.8%	13	6.1%	15	6.2%	20	5.8%	16	8.0%	8	5.5%	11	7.1%	14	3.0%	3
Never	1.3%	8	2.2%	5	0.8%	3	0.8%	1	1.8%	4	1.2%	3	1.2%	4	1.5%	4	2.0%	2	0.5%	1	1.5%	3	2.0%	2
(Refused)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
(Don't know)	0.8%	5	0.0%	0	1.3%	5	1.6%	2	0.0%	0	1.2%	3	0.3%	1	1.5%	4	0.0%	0	1.5%	3	0.5%	1	1.0%	1
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Meanscore[Very good=5, Quite good=4, Neither good nor poor=3, Quite poor=2, Veery poor-1]

Q14 Please rate (STUDY CENTRE) in respect of the following factors?

Availability of parking

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	15.9%	95	15.2%	34	16.3%	61	8.8%	11	19.0%	43	16.6%	41	16.5%	53	15.3%	42	10.0%	10	16.4%	33	23.7%	47	5.1%	5
Quite Good	34.6%	207	33.6%	75	35.2%	132	42.4%	53	35.0%	79	30.4%	75	33.6%	108	35.0%	96	41.0%	41	25.9%	52	41.9%	83	31.3%	31
Neither good nor poor	13.9%	83	16.1%	36	12.5%	47	15.2%	19	14.6%	33	12.6%	31	12.2%	39	16.1%	44	21.0%	21	9.5%	19	8.1%	16	27.3%	27
Quite poor	11.2%	67	12.6%	28	10.4%	39	11.2%	14	11.5%	26	10.9%	27	12.8%	41	9.5%	26	13.0%	13	14.4%	29	4.0%	8	17.2%	17
Very poor	10.0%	60	5.8%	13	12.5%	47	5.6%	7	10.6%	24	11.7%	29	11.5%	37	8.4%	23	7.0%	7	12.9%	26	9.1%	18	9.1%	9
(Don't know)	14.4%	86	16.6%	37	13.1%	49	16.8%	21	9.3%	21	17.8%	44	13.4%	43	15.7%	43	8.0%	8	20.9%	42	13.1%	26	10.1%	10
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.41*		*3.48*		*3.37*		*3.45*		*3.44*		*3.35*		*3.36*		*3.47*		*3.37*		*3.23*		*3.77*		*3.07*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Parking charges																								
Very good	14.4%	86	15.2%	34	13.9%	52	11.2%	14	16.8%	38	13.8%	34	13.4%	43	15.3%	42	18.0%	18	11.9%	24	17.7%	35	9.1%	9
Quite Good	27.6%	165	27.4%	61	27.7%	104	32.8%	41	31.4%	71	21.5%	53	26.8%	86	28.8%	79	39.0%	39	18.4%	37	34.3%	68	21.2%	21
Neither good nor poor	18.1%	108	18.8%	42	17.6%	66	20.0%	25	16.8%	38	18.2%	45	18.7%	60	17.2%	47	22.0%	22	18.4%	37	10.6%	21	28.3%	28
Quite poor	10.7%	64	8.5%	19	12.0%	45	8.8%	11	11.1%	25	11.3%	28	10.9%	35	10.6%	29	4.0%	4	13.4%	27	6.6%	13	20.2%	20
Very poor	9.4%	56	8.1%	18	10.1%	38	7.2%	9	10.2%	23	9.7%	24	10.9%	35	7.3%	20	2.0%	2	12.9%	26	9.6%	19	9.1%	9
(Don't know)	19.9%	119	22.0%	49	18.7%	70	20.0%	25	13.7%	31	25.5%	63	19.3%	62	20.8%	57	15.0%	15	24.9%	50	21.2%	42	12.1%	12
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.34*		*3.43*		*3.29*		*3.40*		*3.39*		*3.24*		*3.26*		*3.43*		*3.79*		*3.04*		*3.56*		*3.01*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
Traffic congestion																								
Very good	13.7%	82	12.1%	27	14.7%	55	12.8%	16	17.3%	39	10.9%	27	13.4%	43	14.2%	39	12.0%	12	12.4%	25	17.7%	35	10.1%	10
Quite Good	33.6%	201	37.2%	83	31.5%	118	37.6%	47	34.5%	78	30.8%	76	33.6%	108	33.9%	93	40.0%	40	22.4%	45	43.9%	87	29.3%	29
Neither good nor poor	23.6%	141	24.7%	55	22.9%	86	26.4%	33	19.9%	45	25.5%	63	22.4%	72	24.8%	68	27.0%	27	25.9%	52	14.1%	28	34.3%	34
Quite poor	14.0%	84	10.8%	24	16.0%	60	8.8%	11	13.7%	31	17.0%	42	15.0%	48	12.8%	35	14.0%	14	23.4%	47	7.6%	15	8.1%	8
Very poor	8.4%	50	7.2%	16	9.1%	34	7.2%	9	8.4%	19	8.9%	22	9.3%	30	6.9%	19	3.0%	3	11.4%	23	7.6%	15	9.1%	9
(Don't know)	6.7%	40	8.1%	18	5.9%	22	7.2%	9	6.2%	14	6.9%	17	6.2%	20	7.3%	20	4.0%	4	4.5%	9	9.1%	18	9.1%	9
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.32*		*3.40*		*3.28*		*3.43*		*3.41*		*3.19*		*3.29*		*3.39*		*3.46*		*3.01*		*3.62*		*3.26*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
Bus service																								
Very good	8.9%	53	9.4%	21	8.5%	32	8.8%	11	7.5%	17	10.1%	25	4.4%	14	14.2%	39	11.0%	11	10.4%	21	5.6%	11	10.1%	10
Quite Good	22.7%	136	18.8%	42	25.1%	94	26.4%	33	19.0%	43	24.3%	60	17.4%	56	28.8%	79	19.0%	19	20.4%	41	21.2%	42	34.3%	34
Neither good nor poor	16.9%	101	13.5%	30	18.9%	71	19.2%	24	20.4%	46	12.6%	31	12.5%	40	21.9%	60	11.0%	11	17.9%	36	15.7%	31	23.2%	23
Quite poor	6.0%	36	4.9%	11	6.7%	25	4.0%	5	7.1%	16	6.1%	15	6.2%	20	5.8%	16	7.0%	7	4.5%	9	5.1%	10	10.1%	10
Very poor	6.0%	36	5.8%	13	6.1%	23	4.8%	6	6.2%	14	6.5%	16	6.5%	21	5.5%	15	6.0%	6	3.5%	7	8.1%	16	7.1%	7
(Don't know)	39.5%	236	47.5%	106	34.7%	130	36.8%	46	39.8%	90	40.5%	100	53.0%	170	23.7%	65	46.0%	46	43.3%	87	44.4%	88	15.2%	15
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.37*		*3.40*		*3.36*		*3.48*		*3.24*		*3.43*		*3.15*		*3.53*		*3.41*		*3.53*		*3.20*		*3.36*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Bus facilities (shelters)																								
Very good	7.4%	44	8.5%	19	6.7%	25	8.8%	11	6.6%	15	7.3%	18	2.8%	9	12.8%	35	11.0%	11	8.0%	16	3.5%	7	10.1%	10
Quite Good	22.9%	137	17.9%	40	25.9%	97	24.8%	31	18.6%	42	25.9%	64	17.4%	56	29.2%	80	22.0%	22	22.4%	45	19.7%	39	31.3%	31
Neither good nor poor	18.9%	113	16.1%	36	20.5%	77	17.6%	22	24.3%	55	14.6%	36	15.6%	50	22.6%	62	10.0%	10	19.9%	40	18.7%	37	26.3%	26
Quite poor	5.9%	35	4.9%	11	6.4%	24	7.2%	9	6.6%	15	4.5%	11	4.7%	15	7.3%	20	8.0%	8	5.0%	10	3.5%	7	10.1%	10
Very poor	4.7%	28	4.9%	11	4.5%	17	4.8%	6	3.1%	7	6.1%	15	5.3%	17	4.0%	11	3.0%	3	1.5%	3	7.6%	15	7.1%	7
(Don't know)	40.3%	241	47.5%	106	36.0%	135	36.8%	46	40.7%	92	41.7%	103	54.2%	174	24.1%	66	46.0%	46	43.3%	87	47.0%	93	15.2%	15
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.38*		*3.38*		*3.37*		*3.41*		*3.32*		*3.41*		*3.17*		*3.52*		*3.56*		*3.54*		*3.15*		*3.32*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
Personal safety																								
Very good	39.8%	238	42.2%	94	38.4%	144	32.8%	41	43.4%	98	40.1%	99	41.1%	132	38.0%	104	30.0%	30	48.3%	97	47.5%	94	17.2%	17
Quite Good	39.8%	238	38.1%	85	40.8%	153	41.6%	52	32.7%	74	45.3%	112	40.8%	131	38.7%	106	49.0%	49	38.3%	77	37.4%	74	38.4%	38
Neither good nor poor	10.2%	61	5.8%	13	12.8%	48	13.6%	17	11.9%	27	6.9%	17	8.7%	28	12.0%	33	10.0%	10	10.9%	22	5.6%	11	18.2%	18
Quite poor	3.3%	20	3.1%	7	3.5%	13	5.6%	7	3.5%	8	2.0%	5	2.5%	8	4.4%	12	7.0%	7	0.0%	0	3.0%	6	7.1%	7
Very poor	2.7%	16	2.7%	6	2.7%	10	2.4%	3	3.5%	8	2.0%	5	1.9%	6	3.7%	10	1.0%	1	0.5%	1	3.0%	6	8.1%	8
(Don't know)	4.2%	25	8.1%	18	1.9%	7	4.0%	5	4.9%	11	3.6%	9	5.0%	16	3.3%	9	3.0%	3	2.0%	4	3.5%	7	11.1%	11
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*4.16*		*4.24*		*4.11*		*4.01*		*4.14*		*4.24*		*4.23*		*4.06*		*4.03*		*4.37*		*4.28*		*3.56*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
Range of shops and services available																								
Very good	17.6%	105	16.1%	36	18.4%	69	18.4%	23	16.4%	37	18.2%	45	15.9%	51	19.3%	53	15.0%	15	26.4%	53	13.1%	26	11.1%	11
Quite Good	44.8%	268	37.2%	83	49.3%	185	45.6%	57	42.5%	96	46.6%	115	47.0%	151	42.7%	117	48.0%	48	49.3%	99	35.9%	71	50.5%	50
Neither good nor poor	14.5%	87	20.6%	46	10.9%	41	15.2%	19	12.4%	28	16.2%	40	14.3%	46	15.0%	41	18.0%	18	11.4%	23	15.7%	31	15.2%	15
Quite poor	14.9%	89	14.4%	32	15.2%	57	14.4%	18	18.1%	41	12.1%	30	14.6%	47	15.0%	41	13.0%	13	9.5%	19	22.2%	44	13.1%	13
Very poor	6.7%	40	8.5%	19	5.6%	21	6.4%	8	8.4%	19	5.3%	13	6.2%	20	6.9%	19	5.0%	5	2.0%	4	11.6%	23	8.1%	8
(Don't know)	1.5%	9	3.1%	7	0.5%	2	0.0%	0	2.2%	5	1.6%	4	1.9%	6	1.1%	3	1.0%	1	1.5%	3	1.5%	3	2.0%	2
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.52*		*3.39*		*3.60*		*3.55*		*3.41*		*3.61*		*3.53*		*3.53*		*3.56*		*3.90*		*3.17*		*3.44*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Quality of shops and services available

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	18.7%	112	17.5%	39	19.5%	73	18.4%	23	18.1%	41	19.4%	48	17.4%	56	20.1%	55	14.0%	14	30.3%	61	13.1%	26	11.1%	11
Quite Good	50.3%	301	43.5%	97	54.4%	204	48.8%	61	46.0%	104	55.1%	136	53.3%	171	47.1%	129	47.0%	47	56.7%	114	47.0%	93	47.5%	47
Neither good nor poor	14.7%	88	19.7%	44	11.7%	44	16.0%	20	15.9%	36	13.0%	32	13.4%	43	16.4%	45	24.0%	24	7.0%	14	16.2%	32	18.2%	18
Quite poor	10.7%	64	10.8%	24	10.7%	40	10.4%	13	12.8%	29	8.9%	22	10.6%	34	10.9%	30	11.0%	11	4.0%	8	15.2%	30	15.2%	15
Very poor	3.8%	23	5.4%	12	2.9%	11	6.4%	8	4.9%	11	1.6%	4	3.1%	10	4.4%	12	3.0%	3	1.0%	2	6.1%	12	6.1%	6
(Don't know)	1.7%	10	3.1%	7	0.8%	3	0.0%	0	2.2%	5	2.0%	5	2.2%	7	1.1%	3	1.0%	1	1.0%	2	2.5%	5	2.0%	2
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.71*		*3.59*		*3.77*		*3.62*		*3.61*		*3.83*		*3.73*		*3.68*		*3.59*		*4.13*		*3.47*		*3.43*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Daytime entertainment/leisure facilities

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	11.5%	69	11.2%	25	11.7%	44	11.2%	14	13.3%	30	10.1%	25	9.3%	30	14.2%	39	9.0%	9	15.9%	32	8.6%	17	11.1%	11
Quite Good	35.5%	212	31.8%	71	37.6%	141	36.0%	45	35.8%	81	34.8%	86	36.8%	118	33.9%	93	35.0%	35	35.3%	71	34.3%	68	38.4%	38
Neither good nor poor	20.6%	123	22.9%	51	19.2%	72	24.8%	31	21.2%	48	17.8%	44	18.1%	58	23.7%	65	32.0%	32	17.9%	36	19.7%	39	16.2%	16
Quite poor	11.5%	69	12.1%	27	11.2%	42	16.0%	20	12.4%	28	8.5%	21	13.4%	43	9.1%	25	9.0%	9	5.5%	11	15.2%	30	19.2%	19
Very poor	4.7%	28	6.7%	15	3.5%	13	4.8%	6	6.2%	14	3.2%	8	4.1%	13	5.1%	14	6.0%	6	1.0%	2	5.6%	11	9.1%	9
(Don't know)	16.2%	97	15.2%	34	16.8%	63	7.2%	9	11.1%	25	25.5%	63	18.4%	59	13.9%	38	9.0%	9	24.4%	49	16.7%	33	6.1%	6
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.45*		*3.34*		*3.52*		*3.35*		*3.42*		*3.54*		*3.42*		*3.50*		*3.35*		*3.79*		*3.30*		*3.25*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Evening entertainment and leisure facilities

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	13.7%	82	11.2%	25	15.2%	57	16.0%	20	14.6%	33	11.7%	29	14.0%	45	13.5%	37	10.0%	10	19.4%	39	8.6%	17	16.2%	16
Quite Good	33.1%	198	30.9%	69	34.4%	129	36.0%	45	33.6%	76	31.2%	77	33.6%	108	32.5%	89	34.0%	34	30.8%	62	32.8%	65	37.4%	37
Neither good nor poor	21.1%	126	21.1%	47	21.1%	79	24.0%	30	23.0%	52	17.8%	44	16.8%	54	25.9%	71	30.0%	30	17.9%	36	20.2%	40	20.2%	20
Quite poor	7.5%	45	10.3%	23	5.9%	22	11.2%	14	8.0%	18	5.3%	13	9.3%	30	5.5%	15	5.0%	5	3.0%	6	12.1%	24	10.1%	10
Very poor	3.7%	22	4.0%	9	3.5%	13	3.2%	4	5.3%	12	2.4%	6	3.4%	11	4.0%	11	3.0%	3	1.5%	3	4.0%	8	8.1%	8
(Don't know)	20.9%	125	22.4%	50	20.0%	75	9.6%	12	15.5%	35	31.6%	78	22.7%	73	18.6%	51	18.0%	18	27.4%	55	22.2%	44	8.1%	8
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.58*		*3.45*		*3.65*		*3.56*		*3.52*		*3.65*		*3.59*		*3.57*		*3.52*		*3.88*		*3.38*		*3.47*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Town Centre events

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	15.2%	91	9.4%	21	18.7%	70	14.4%	18	17.3%	39	13.8%	34	16.2%	52	14.2%	39	14.0%	14	22.4%	45	9.6%	19	13.1%	13
Quite Good	40.3%	241	38.6%	86	41.3%	155	28.8%	36	40.3%	91	46.2%	114	41.7%	134	38.3%	105	42.0%	42	45.3%	91	38.4%	76	32.3%	32
Neither good nor poor	21.6%	129	23.3%	52	20.5%	77	22.4%	28	22.6%	51	20.2%	50	18.1%	58	25.9%	71	28.0%	28	16.4%	33	20.7%	41	27.3%	27
Quite poor	6.0%	36	8.5%	19	4.5%	17	9.6%	12	6.6%	15	3.6%	9	5.9%	19	6.2%	17	3.0%	3	1.0%	2	7.6%	15	16.2%	16
Very poor	2.8%	17	2.7%	6	2.9%	11	6.4%	8	2.7%	6	1.2%	3	2.2%	7	3.3%	9	3.0%	3	0.0%	0	4.5%	9	5.1%	5
(Don’t know)	14.0%	84	17.5%	39	12.0%	45	18.4%	23	10.6%	24	15.0%	37	15.9%	51	12.0%	33	10.0%	10	14.9%	30	19.2%	38	6.1%	6
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.69*		*3.53*		*3.78*		*3.43*		*3.70*		*3.80*		*3.76*		*3.61*		*3.68*		*4.05*		*3.51*		*3.34*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Liveliness / street life / character

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	20.6%	123	17.5%	39	22.4%	84	16.8%	21	23.0%	52	20.2%	50	22.1%	71	19.0%	52	16.0%	16	36.8%	74	11.1%	22	11.1%	11
Quite Good	45.2%	270	41.3%	92	47.5%	178	42.4%	53	41.6%	94	49.8%	123	45.2%	145	45.3%	124	55.0%	55	48.3%	97	38.9%	77	41.4%	41
Neither good nor poor	21.6%	129	25.1%	56	19.5%	73	23.2%	29	23.9%	54	18.6%	46	20.9%	67	22.3%	61	25.0%	25	11.9%	24	26.3%	52	28.3%	28
Quite poor	5.7%	34	7.2%	16	4.8%	18	8.0%	10	5.3%	12	4.9%	12	6.2%	20	5.1%	14	3.0%	3	0.0%	0	11.6%	23	8.1%	8
Very poor	3.3%	20	4.5%	10	2.7%	10	6.4%	8	2.7%	6	2.4%	6	2.8%	9	3.7%	10	1.0%	1	1.0%	2	5.6%	11	6.1%	6
(Don’t know)	3.7%	22	4.5%	10	3.2%	12	3.2%	4	3.5%	8	4.0%	10	2.8%	9	4.7%	13	0.0%	0	2.0%	4	6.6%	13	5.1%	5
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.77*		*3.63*		*3.85*		*3.57*		*3.80*		*3.84*		*3.80*		*3.74*		*3.82*		*4.22*		*3.41*		*3.46*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Quality / number of places to eat-drink

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	30.3%	181	26.0%	58	32.8%	123	28.0%	35	31.0%	70	30.8%	76	33.0%	106	27.0%	74	14.0%	14	56.2%	113	19.2%	38	16.2%	16
Quite Good	49.2%	294	49.3%	110	49.1%	184	49.6%	62	46.9%	106	51.0%	126	46.1%	148	52.6%	144	58.0%	58	37.8%	76	55.6%	110	50.5%	50
Neither good nor poor	12.0%	72	15.2%	34	10.1%	38	10.4%	13	14.2%	32	10.9%	27	13.1%	42	10.9%	30	21.0%	21	3.0%	6	13.6%	27	18.2%	18
Quite poor	2.8%	17	2.2%	5	3.2%	12	4.8%	6	3.1%	7	1.6%	4	3.4%	11	2.2%	6	2.0%	2	0.5%	1	3.5%	7	7.1%	7
Very poor	1.8%	11	2.2%	5	1.6%	6	4.0%	5	1.3%	3	1.2%	3	1.2%	4	2.6%	7	1.0%	1	0.0%	0	2.5%	5	5.1%	5
(Don’t know)	3.8%	23	4.9%	11	3.2%	12	3.2%	4	3.5%	8	4.5%	11	3.1%	10	4.7%	13	4.0%	4	2.5%	5	5.6%	11	3.0%	3
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*4.07*		*4.00*		*4.12*		*3.96*		*4.07*		*4.14*		*4.10*		*4.04*		*3.85*		*4.54*		*3.90*		*3.68*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

General shopping environment

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	22.9%	137	18.4%	41	25.6%	96	20.0%	25	24.3%	55	23.1%	57	23.1%	74	23.0%	63	13.0%	13	34.3%	69	18.7%	37	18.2%	18
Quite Good	55.4%	331	50.2%	112	58.4%	219	56.8%	71	54.0%	122	55.9%	138	55.8%	179	54.4%	149	58.0%	58	57.2%	115	55.6%	110	48.5%	48
Neither good nor poor	13.7%	82	20.2%	45	9.9%	37	14.4%	18	14.2%	32	13.0%	32	13.7%	44	13.9%	38	22.0%	22	5.5%	11	14.6%	29	20.2%	20
Quite poor	4.8%	29	5.4%	12	4.5%	17	5.6%	7	4.0%	9	5.3%	13	5.0%	16	4.7%	13	5.0%	5	2.0%	4	7.1%	14	6.1%	6
Very poor	2.0%	12	3.1%	7	1.3%	5	3.2%	4	2.2%	5	1.2%	3	1.6%	5	2.6%	7	1.0%	1	0.5%	1	2.5%	5	5.1%	5
(Don’t know)	1.2%	7	2.7%	6	0.3%	1	0.0%	0	1.3%	3	1.6%	4	0.9%	3	1.5%	4	1.0%	1	0.5%	1	1.5%	3	2.0%	2
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.93*		*3.77*		*4.03*		*3.85*		*3.96*		*3.96*		*3.95*		*3.92*		*3.78*		*4.24*		*3.82*		*3.70*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Planting / landscaping

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	22.7%	136	22.0%	49	23.2%	87	23.2%	29	29.2%	66	16.6%	41	19.3%	62	27.0%	74	18.0%	18	17.4%	35	33.3%	66	17.2%	17
Quite Good	45.5%	272	45.3%	101	45.6%	171	44.8%	56	42.9%	97	48.2%	119	45.2%	145	46.4%	127	58.0%	58	40.8%	82	44.4%	88	44.4%	44
Neither good nor poor	16.6%	99	17.9%	40	15.7%	59	16.0%	20	15.0%	34	18.2%	45	17.4%	56	15.3%	42	16.0%	16	20.4%	41	10.6%	21	21.2%	21
Quite poor	9.2%	55	7.2%	16	10.4%	39	9.6%	12	8.4%	19	9.7%	24	12.5%	40	5.1%	14	7.0%	7	14.4%	29	5.6%	11	8.1%	8
Very poor	2.8%	17	3.6%	8	2.4%	9	4.0%	5	2.2%	5	2.8%	7	2.8%	9	2.6%	7	0.0%	0	3.0%	6	2.5%	5	6.1%	6
(Don’t know)	3.2%	19	4.0%	9	2.7%	10	2.4%	3	2.2%	5	4.5%	11	2.8%	9	3.7%	10	1.0%	1	4.0%	8	3.5%	7	3.0%	3
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.79*		*3.78*		*3.79*		*3.75*		*3.90*		*3.69*		*3.68*		*3.94*		*3.88*		*3.58*		*4.04*		*3.60*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Layout of centre

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Very good	23.1%	138	20.2%	45	24.8%	93	23.2%	29	27.0%	61	19.4%	48	21.5%	69	25.2%	69	14.0%	14	23.9%	48	27.8%	55	21.2%	21
Quite Good	51.5%	308	48.9%	109	53.1%	199	52.0%	65	47.8%	108	54.7%	135	51.7%	166	51.1%	140	51.0%	51	59.2%	119	46.5%	92	46.5%	46
Neither good nor poor	15.9%	95	20.6%	46	13.1%	49	13.6%	17	15.5%	35	17.4%	43	16.5%	53	15.3%	42	27.0%	27	11.4%	23	17.2%	34	11.1%	11
Quite poor	5.0%	30	4.5%	10	5.3%	20	5.6%	7	6.2%	14	3.6%	9	5.9%	19	4.0%	11	5.0%	5	3.0%	6	3.5%	7	12.1%	12
Very poor	2.8%	17	3.6%	8	2.4%	9	5.6%	7	1.8%	4	2.4%	6	2.5%	8	2.9%	8	1.0%	1	0.5%	1	3.5%	7	8.1%	8
(Don’t know)	1.7%	10	2.2%	5	1.3%	5	0.0%	0	1.8%	4	2.4%	6	1.9%	6	1.5%	4	2.0%	2	2.0%	4	1.5%	3	1.0%	1
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.88*		*3.79*		*3.94*		*3.82*		*3.94*		*3.87*		*3.85*		*3.93*		*3.73*		*4.05*		*3.93*		*3.61*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Size / quality of supermarket(s)																								
Very good	20.4%	122	21.1%	47	20.0%	75	20.0%	25	21.7%	49	19.4%	48	19.9%	64	21.2%	58	17.0%	17	23.9%	48	21.2%	42	15.2%	15
Quite Good	50.7%	303	47.5%	106	52.5%	197	49.6%	62	51.3%	116	50.6%	125	51.4%	165	49.3%	135	48.0%	48	48.3%	97	56.6%	112	46.5%	46
Neither good nor poor	16.7%	100	18.8%	42	15.5%	58	16.8%	21	14.6%	33	18.6%	46	14.6%	47	19.3%	53	28.0%	28	16.9%	34	9.1%	18	20.2%	20
Quite poor	6.4%	38	4.5%	10	7.5%	28	8.0%	10	5.8%	13	6.1%	15	7.5%	24	5.1%	14	3.0%	3	7.0%	14	4.5%	9	12.1%	12
Very poor	2.3%	14	4.0%	9	1.3%	5	3.2%	4	3.1%	7	1.2%	3	1.6%	5	3.3%	9	1.0%	1	0.5%	1	3.5%	7	5.1%	5
(Don't know)	3.5%	21	4.0%	9	3.2%	12	2.4%	3	3.5%	8	4.0%	10	5.0%	16	1.8%	5	3.0%	3	3.5%	7	5.1%	10	1.0%	1
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*3.83*		*3.80*		*3.85*		*3.77*		*3.86*		*3.84*		*3.85*		*3.81*		*3.79*		*3.91*		*3.92*		*3.55*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
Public toilets																								
Very good	5.5%	33	6.7%	15	4.8%	18	4.0%	5	6.6%	15	5.3%	13	4.4%	14	6.9%	19	2.0%	2	8.5%	17	3.0%	6	8.1%	8
Quite Good	22.4%	134	21.5%	48	22.9%	86	16.8%	21	26.5%	60	21.5%	53	19.3%	62	26.3%	72	21.0%	21	22.4%	45	18.7%	37	31.3%	31
Neither good nor poor	19.9%	119	21.1%	47	19.2%	72	24.0%	30	18.6%	42	19.0%	47	16.2%	52	23.7%	65	32.0%	32	15.9%	32	12.1%	24	31.3%	31
Quite poor	12.5%	75	11.2%	25	13.3%	50	11.2%	14	13.3%	30	12.6%	31	12.5%	40	12.8%	35	9.0%	9	16.9%	34	11.6%	23	9.1%	9
Very poor	13.5%	81	12.6%	28	14.1%	53	14.4%	18	9.7%	22	16.6%	41	16.5%	53	9.9%	27	12.0%	12	12.9%	26	17.2%	34	9.1%	9
(Don't know)	26.1%	156	26.9%	60	25.6%	96	29.6%	37	25.2%	57	25.1%	62	31.2%	100	20.4%	56	24.0%	24	23.4%	47	37.4%	74	11.1%	11
(Not applicable	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Mean:		*2.92*		*2.98*		*2.88*		*2.78*		*3.09*		*2.82*		*2.75*		*3.10*		*2.89*		*2.95*		*2.66*		*3.23*
Base:		598		223		375		125		226		247		321		274		100		201		198		99
(HITCHIN/ROYSTON) The market																								
Very good	7.9%	47	7.6%	17	8.0%	30	6.4%	8	7.1%	16	9.3%	23	5.9%	19	10.2%	28	0.0%	0	17.9%	36	0.0%	0	11.1%	11
Quite Good	20.1%	120	14.8%	33	23.2%	87	20.0%	25	21.7%	49	18.6%	46	21.2%	68	18.6%	51	0.0%	0	38.8%	78	0.0%	0	42.4%	42
Neither good nor poor	8.5%	51	11.2%	25	6.9%	26	9.6%	12	8.0%	18	8.5%	21	9.7%	31	7.3%	20	0.0%	0	14.4%	29	0.0%	0	22.2%	22
Quite poor	5.2%	31	4.5%	10	5.6%	21	7.2%	9	3.5%	8	5.7%	14	4.1%	13	6.2%	17	0.0%	0	9.5%	19	0.0%	0	12.1%	12
Very poor	3.3%	20	1.3%	3	4.5%	17	2.4%	3	2.2%	5	4.9%	12	3.4%	11	3.3%	9	0.0%	0	6.5%	13	0.0%	0	7.1%	7
(Don't know)	5.2%	31	5.8%	13	4.8%	18	4.0%	5	4.4%	10	6.5%	16	7.2%	23	2.9%	8	0.0%	0	12.9%	26	0.0%	0	5.1%	5
(Not applicable	49.8%	298	54.7%	122	46.9%	176	50.4%	63	53.1%	120	46.6%	115	48.6%	156	51.5%	141	100.0%	100	0.0%	0	100.0%	198	0.0%	0
Mean:		*3.53*		*3.58*		*3.51*		*3.46*		*3.66*		*3.47*		*3.50*		*3.58*		*0.00*		*3.60*		*0.00*		*3.40*
Base:		598		223		375		125		226		247		321		274		100		201		198		99

North Hertfordshire In Centre Survey
for Nathaniel Lichfield & Partners

Q15 What improvements would you like to see made in (STUDY CENTRE) ? [MR]

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing in particular	26.9%	161	29.6%	66	25.3%	95	29.6%	37	26.1%	59	26.3%	65	21.8%	70	32.8%	90	35.0%	35	26.9%	54	20.2%	40	32.3%	32
Increase the range of national / multiple chain stores	23.4%	140	15.7%	35	28.0%	105	29.6%	37	22.1%	50	21.5%	53	25.5%	82	20.8%	57	9.0%	9	21.4%	43	37.9%	75	13.1%	13
Increase the range of local / speciality retailers	18.2%	109	17.5%	39	18.7%	70	28.8%	36	19.0%	43	12.1%	30	20.9%	67	15.0%	41	11.0%	11	10.9%	22	29.3%	58	18.2%	18
Improve quality of shops and services	9.2%	55	8.5%	19	9.6%	36	8.0%	10	9.3%	21	9.7%	24	10.3%	33	8.0%	22	10.0%	10	5.5%	11	14.6%	29	5.1%	5
Improve the appearance of the town centre	6.4%	38	4.9%	11	7.2%	27	8.8%	11	8.0%	18	3.6%	9	6.5%	21	6.2%	17	4.0%	4	7.0%	14	1.5%	3	17.2%	17
Improve the market	7.2%	43	3.1%	7	9.6%	36	5.6%	7	6.2%	14	8.9%	22	7.5%	24	6.6%	18	5.0%	5	10.4%	21	1.5%	3	14.1%	14
Make the centre safer (more CCTV, policing, better lighting etc)	2.7%	16	2.2%	5	2.9%	11	3.2%	4	1.8%	4	3.2%	8	1.9%	6	3.7%	10	7.0%	7	1.5%	3	1.5%	3	3.0%	3
Remove/reduce traffic congestion	5.7%	34	5.8%	13	5.6%	21	0.8%	1	7.1%	16	6.9%	17	5.0%	16	6.6%	18	13.0%	13	6.5%	13	3.5%	7	1.0%	1
Provide more housing in the town-centre	1.5%	9	1.3%	3	1.6%	6	1.6%	2	2.7%	6	0.4%	1	0.3%	1	2.9%	8	5.0%	5	0.5%	1	0.0%	0	3.0%	3
Improve frequency of public transport	4.3%	26	3.1%	7	5.1%	19	1.6%	2	5.8%	13	4.5%	11	4.4%	14	4.4%	12	7.0%	7	5.0%	10	3.0%	6	3.0%	3
Improve car parking availability / reduce parking charges	13.0%	78	9.0%	20	15.5%	58	13.6%	17	12.8%	29	13.0%	32	16.8%	54	8.8%	24	11.0%	11	18.4%	37	8.1%	16	14.1%	14
Provide better entertainment / leisure	5.2%	31	7.2%	16	4.0%	15	10.4%	13	4.0%	9	3.6%	9	5.3%	17	5.1%	14	11.0%	11	1.0%	2	6.1%	12	6.1%	6
Improve quality and range of cafes and restaurants	2.0%	12	1.8%	4	2.1%	8	2.4%	3	1.3%	3	2.4%	6	2.5%	8	1.5%	4	4.0%	4	1.5%	3	1.5%	3	2.0%	2
Improve pedestrian links and facilities in the town centre	1.8%	11	1.8%	4	1.9%	7	0.0%	0	1.8%	4	2.8%	7	1.6%	5	2.2%	6	1.0%	1	3.5%	7	0.5%	1	2.0%	2
Improve food store	1.2%	7	0.4%	1	1.6%	6	0.0%	0	1.3%	3	1.6%	4	1.6%	5	0.7%	2	1.0%	1	2.0%	4	0.5%	1	1.0%	1
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
A cinema	1.3%	8	2.2%	5	0.8%	3	2.4%	3	0.4%	1	1.6%	4	2.5%	8	0.0%	0	0.0%	0	4.0%	8	0.0%	0	0.0%	0
Improve road surfaces	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.8%	2	0.0%	0	0.7%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0
Improved access for disabled	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.0%	0	0.8%	2	0.6%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0
Improved paving	0.7%	4	0.9%	2	0.5%	2	0.0%	0	0.4%	1	1.2%	3	0.3%	1	1.1%	3	1.0%	1	1.5%	3	0.0%	0	0.0%	0
Keep out lorries / HGVs	1.0%	6	1.8%	4	0.5%	2	0.0%	0	0.4%	1	2.0%	5	1.6%	5	0.4%	1	4.0%	4	1.0%	2	0.0%	0	0.0%	0
Less empty shops	1.0%	6	0.9%	2	1.1%	4	2.4%	3	0.0%	0	1.2%	3	1.2%	4	0.7%	2	0.0%	0	1.0%	2	2.0%	4	0.0%	0
Make more pedestrianised areas	0.8%	5	0.9%	2	0.8%	3	0.0%	0	0.4%	1	1.6%	4	1.2%	4	0.4%	1	1.0%	1	2.0%	4	0.0%	0	0.0%	0
More / improved public toilets	6.4%	38	5.4%	12	6.9%	26	1.6%	2	8.4%	19	6.9%	17	5.3%	17	7.7%	21	2.0%	2	8.5%	17	9.6%	19	0.0%	0
More undercover areas	0.8%	5	2.2%	5	0.0%	0	0.8%	1	0.4%	1	1.2%	3	0.6%	2	1.1%	3	0.0%	0	0.5%	1	2.0%	4	0.0%	0
Stop smoking in the arcade	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
(Don't know)	6.9%	41	9.9%	22	5.1%	19	5.6%	7	6.6%	15	7.7%	19	8.1%	26	5.5%	15	4.0%	4	6.0%	12	7.6%	15	10.1%	10
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q16 Do you or other members of your household ever come to (STUDY CENTRE) in the evenings?

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Yes	51.2%	306	50.7%	113	51.5%	193	58.4%	73	52.7%	119	46.2%	114	59.8%	192	41.6%	114	51.0%	51	53.2%	107	42.4%	84	64.6%	64
No	48.0%	287	48.9%	109	47.5%	178	40.8%	51	47.3%	107	52.2%	129	39.6%	127	57.3%	157	49.0%	49	44.8%	90	57.1%	113	35.4%	35
(Don’t know)	0.8%	5	0.4%	1	1.1%	4	0.8%	1	0.0%	0	1.6%	4	0.6%	2	1.1%	3	0.0%	0	2.0%	4	0.5%	1	0.0%	0
Base:		598		223		375		125		226		247		321		274		100		201		198		99

Q17 What do you or other members of your household do in (STUDY CENTRE) in the evening ? [MR]

Those who said yes at Q16

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Sports facilities	5.2%	16	7.1%	8	4.1%	8	8.2%	6	5.9%	7	2.6%	3	5.2%	10	5.3%	6	5.9%	3	4.7%	5	4.8%	4	6.3%	4
Pubs / bars	50.0%	153	59.3%	67	44.6%	86	67.1%	49	57.1%	68	31.6%	36	49.0%	94	51.8%	59	52.9%	27	50.5%	54	35.7%	30	65.6%	42
Restaurants	75.2%	230	68.1%	77	79.3%	153	63.0%	46	74.0%	88	84.2%	96	82.8%	159	62.3%	71	68.6%	35	91.6%	98	71.4%	60	57.8%	37
Services (e.g. cash tills)	6.2%	19	7.1%	8	5.7%	11	9.6%	7	5.0%	6	5.3%	6	4.7%	9	8.8%	10	5.9%	3	5.6%	6	0.0%	0	15.6%	10
Takeaway food	16.3%	50	17.7%	20	15.5%	30	17.8%	13	17.6%	21	14.0%	16	13.5%	26	21.1%	24	17.6%	9	7.5%	8	3.6%	3	46.9%	30
Walk about / look around	6.9%	21	5.3%	6	7.8%	15	8.2%	6	7.6%	9	5.3%	6	6.8%	13	7.0%	8	7.8%	4	4.7%	5	4.8%	4	12.5%	8
Theatre	5.9%	18	7.1%	8	5.2%	10	2.7%	2	3.4%	4	10.5%	12	6.8%	13	4.4%	5	0.0%	0	12.2%	13	3.6%	3	3.1%	2
Nightclubs	2.0%	6	1.8%	2	2.1%	4	2.7%	2	1.7%	2	1.8%	2	1.6%	3	2.6%	3	0.0%	0	0.9%	1	0.0%	0	7.8%	5
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Cinema	8.5%	26	8.0%	9	8.8%	17	5.5%	4	12.6%	15	6.1%	7	8.9%	17	7.9%	9	0.0%	0	0.9%	1	28.6%	24	1.6%	1
Work / business purposes	0.3%	1	0.0%	0	0.5%	1	1.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0	0.9%	1	0.0%	0	0.0%	0
(Don’t know / varies)	1.6%	5	2.7%	3	1.0%	2	1.4%	1	2.5%	3	0.9%	1	1.0%	2	2.6%	3	2.0%	1	0.9%	1	3.6%	3	0.0%	0
Base:		306		113		193		73		119		114		192		114		51		107		84		64

Q18 What do you like about visiting the leisure / pubs and bars / restaurant facilities in (STUDY CENTRE) ? [MR]

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing in particular	16.2%	97	17.9%	40	15.2%	57	17.6%	22	17.3%	39	14.6%	36	15.0%	48	17.9%	49	12.0%	12	7.5%	15	23.7%	47	23.2%	23
Close to home / easy to get to	28.8%	172	27.4%	61	29.6%	111	39.2%	49	28.8%	65	23.5%	58	26.5%	85	31.8%	87	33.0%	33	18.9%	38	25.3%	50	51.5%	51
Good theatre	3.0%	18	3.6%	8	2.7%	10	1.6%	2	3.5%	8	3.2%	8	2.2%	7	4.0%	11	6.0%	6	1.5%	3	3.0%	6	3.0%	3
Good choice of restaurants	26.1%	156	20.2%	45	29.6%	111	20.0%	25	27.0%	61	28.3%	70	29.3%	94	22.6%	62	20.0%	20	43.8%	88	15.7%	31	17.2%	17
Good quality of restaurants	15.7%	94	13.9%	31	16.8%	63	12.8%	16	17.7%	40	15.4%	38	20.2%	65	10.6%	29	18.0%	18	21.4%	43	9.1%	18	15.2%	15
Good quality of pubs / bars	7.9%	47	8.1%	18	7.7%	29	8.0%	10	11.5%	26	4.5%	11	7.8%	25	8.0%	22	13.0%	13	9.5%	19	3.0%	6	9.1%	9
Good choice of pubs / bars	4.5%	27	5.4%	12	4.0%	15	8.0%	10	4.0%	9	3.2%	8	4.4%	14	4.7%	13	2.0%	2	4.0%	8	2.5%	5	12.1%	12
Good health/fitness facilities	0.8%	5	0.9%	2	0.8%	3	0.8%	1	0.9%	2	0.8%	2	0.9%	3	0.7%	2	1.0%	1	1.0%	2	1.0%	2	0.0%	0
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Family friendly	0.8%	5	0.4%	1	1.1%	4	0.8%	1	0.4%	1	1.2%	3	0.9%	3	0.7%	2	1.0%	1	2.0%	4	0.0%	0	0.0%	0
Feel safe	0.7%	4	0.0%	0	1.1%	4	0.8%	1	0.9%	2	0.4%	1	0.9%	3	0.4%	1	1.0%	1	1.5%	3	0.0%	0	0.0%	0
Good atmosphere	3.8%	23	2.2%	5	4.8%	18	2.4%	3	4.0%	9	4.5%	11	5.6%	18	1.8%	5	0.0%	0	8.0%	16	3.5%	7	0.0%	0
Good cinema	1.7%	10	1.8%	4	1.6%	6	1.6%	2	2.2%	5	1.2%	3	1.6%	5	1.8%	5	0.0%	0	0.0%	0	5.1%	10	0.0%	0
(Don’t know)	2.7%	16	3.1%	7	2.4%	9	1.6%	2	2.7%	6	3.2%	8	2.2%	7	3.3%	9	1.0%	1	4.5%	9	2.5%	5	1.0%	1
(Don’t visit these places in (STUDY CENTRE)	19.7%	118	20.6%	46	19.2%	72	15.2%	19	18.1%	41	23.5%	58	18.1%	58	20.8%	57	19.0%	19	23.4%	47	23.7%	47	5.1%	5
Base:		598		223		375		125		226		247		321		274		100		201		198		99

North Hertfordshire In Centre Survey
for Nathaniel Lichfield & Partners

Q19 What do you dislike about visiting the leisure / pubs and bars / restaurant facilities in (STUDY CENTRE)? [MR]
Those who visit for leisure / pub / restaurants at Q18

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Nothing in particular	68.3%	328	68.9%	122	68.0%	206	57.5%	61	65.9%	122	76.7%	145	66.9%	176	70.0%	152	60.5%	49	75.3%	116	66.9%	101	66.0%	62
Poor choice of facilities	10.2%	49	10.7%	19	9.9%	30	16.0%	17	9.7%	18	7.4%	14	12.2%	32	7.8%	17	9.9%	8	7.8%	12	13.2%	20	9.6%	9
Too expensive	1.7%	8	2.8%	5	1.0%	3	3.8%	4	1.6%	3	0.5%	1	1.1%	3	2.3%	5	4.9%	4	1.3%	2	1.3%	2	0.0%	0
Unsafe / poor security / dangerous	1.9%	9	1.7%	3	2.0%	6	1.9%	2	1.6%	3	2.1%	4	2.7%	7	0.9%	2	6.2%	5	1.3%	2	0.7%	1	1.1%	1
Lack of car parking	3.3%	16	4.0%	7	3.0%	9	2.8%	3	5.4%	10	1.6%	3	2.7%	7	4.1%	9	9.9%	8	1.3%	2	0.7%	1	5.3%	5
Car parking charges	3.8%	18	1.7%	3	5.0%	15	4.7%	5	4.3%	8	2.6%	5	2.3%	6	5.5%	12	7.4%	6	3.2%	5	2.0%	3	4.3%	4
Lack of public transport	1.3%	6	0.6%	1	1.7%	5	0.9%	1	1.6%	3	1.1%	2	0.4%	1	2.3%	5	2.5%	2	0.6%	1	0.7%	1	2.1%	2
Other (PLEASE WRITE IN)	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0	0.0%	0
Anti social behaviour	2.1%	10	2.3%	4	2.0%	6	2.8%	3	0.5%	1	3.2%	6	3.0%	8	0.9%	2	0.0%	0	4.5%	7	2.0%	3	0.0%	0
Lack of public toilets	0.4%	2	0.6%	1	0.3%	1	0.0%	0	0.5%	1	0.5%	1	0.8%	2	0.0%	0	1.2%	1	0.0%	0	0.7%	1	0.0%	0
Too busy	0.4%	2	0.0%	0	0.7%	2	0.9%	1	0.0%	0	0.5%	1	0.8%	2	0.0%	0	0.0%	0	1.3%	2	0.0%	0	0.0%	0
(Don't know)	9.4%	45	9.6%	17	9.2%	28	10.4%	11	11.9%	22	6.3%	12	8.4%	22	10.6%	23	4.9%	4	4.5%	7	11.9%	18	17.0%	16
Base:		480		177		303		106		185		189		263		217		81		154		151		94

GEN GEN

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Male	37.3%	223	100.0%	223	0.0%	0	37.6%	47	34.5%	78	39.7%	98	35.2%	113	39.8%	109	38.0%	38	30.8%	62	42.4%	84	39.4%	39
Female	62.7%	375	0.0%	0	100.0%	375	62.4%	78	65.5%	148	60.3%	149	64.8%	208	60.2%	165	62.0%	62	69.2%	139	57.6%	114	60.6%	60
Base:		598		223		375		125		226		247		321		274		100		201		198		99

AGE AGE

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
18 - 24 years	8.4%	50	8.1%	18	8.5%	32	40.0%	50	0.0%	0	0.0%	0	7.5%	24	9.5%	26	12.0%	12	5.5%	11	7.6%	15	12.1%	12
25 - 34 years	12.5%	75	13.0%	29	12.3%	46	60.0%	75	0.0%	0	0.0%	0	11.8%	38	13.1%	36	8.0%	8	9.0%	18	14.1%	28	21.2%	21
35 - 44 years	16.6%	99	14.8%	33	17.6%	66	0.0%	0	43.8%	99	0.0%	0	18.4%	59	14.6%	40	8.0%	8	14.4%	29	20.7%	41	21.2%	21
45 - 54 years	21.2%	127	20.2%	45	21.9%	82	0.0%	0	56.2%	127	0.0%	0	21.5%	69	21.2%	58	30.0%	30	16.4%	33	20.7%	41	23.2%	23
55 - 64 years	19.6%	117	19.7%	44	19.5%	73	0.0%	0	0.0%	0	47.4%	117	19.3%	62	19.7%	54	17.0%	17	27.9%	56	17.2%	34	10.1%	10
65+ years	21.7%	130	24.2%	54	20.3%	76	0.0%	0	0.0%	0	52.6%	130	21.5%	69	21.9%	60	25.0%	25	26.9%	54	19.7%	39	12.1%	12
Base:		598		223		375		125		226		247		321		274		100		201		198		99

SEG Occupation of Chief Wage Earner:

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
AB	20.1%	120	18.8%	42	20.8%	78	15.2%	19	18.6%	42	23.9%	59	37.4%	120	0.0%	0	19.0%	19	26.4%	53	19.7%	39	9.1%	9
C1	33.6%	201	31.8%	71	34.7%	130	34.4%	43	38.1%	86	29.2%	72	62.6%	201	0.0%	0	29.0%	29	38.8%	78	34.8%	69	25.3%	25
C2	19.1%	114	19.7%	44	18.7%	70	25.6%	32	22.1%	50	13.0%	32	0.0%	0	41.6%	114	22.0%	22	9.0%	18	21.2%	42	32.3%	32
DE	26.8%	160	29.1%	65	25.3%	95	24.0%	30	21.2%	48	33.2%	82	0.0%	0	58.4%	160	30.0%	30	24.9%	50	23.7%	47	33.3%	33
(Refused)	0.5%	3	0.4%	1	0.5%	2	0.8%	1	0.0%	0	0.8%	2	0.0%	0	0.0%	0	0.0%	0	1.0%	2	0.5%	1	0.0%	0
Base:		598		223		375		125		226		247		321		274		100		201		198		99

ADU Number of adults (incl Resp.):

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
One	21.7%	130	25.1%	56	19.7%	74	16.0%	20	17.7%	40	28.3%	70	16.2%	52	28.1%	77	23.0%	23	23.9%	48	20.2%	40	19.2%	19
Two	58.4%	349	52.5%	117	61.9%	232	56.0%	70	57.5%	130	60.3%	149	62.9%	202	52.9%	145	52.0%	52	58.7%	118	60.6%	120	59.6%	59
Three or more	19.9%	119	22.4%	50	18.4%	69	28.0%	35	24.8%	56	11.3%	28	20.9%	67	19.0%	52	25.0%	25	17.4%	35	19.2%	38	21.2%	21
Base:		598		223		375		125		226		247		321		274		100		201		198		99

CHI No. of children 15 years and under:

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
One	14.4%	86	12.1%	27	15.7%	59	27.2%	34	20.8%	47	2.0%	5	13.1%	42	16.1%	44	11.0%	11	10.9%	22	15.2%	30	23.2%	23
Two	10.7%	64	8.1%	18	12.3%	46	16.0%	20	18.6%	42	0.8%	2	11.8%	38	9.5%	26	7.0%	7	9.5%	19	11.1%	22	16.2%	16
Three or more	5.5%	33	4.9%	11	5.9%	22	7.2%	9	10.2%	23	0.4%	1	4.1%	13	7.3%	20	5.0%	5	2.5%	5	5.6%	11	12.1%	12
(None)	69.4%	415	74.9%	167	66.1%	248	49.6%	62	50.4%	114	96.8%	239	71.0%	228	67.2%	184	77.0%	77	77.1%	155	68.2%	135	48.5%	48
Base:		598		223		375		125		226		247		321		274		100		201		198		99

DAY Day of Interview:

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Monday	17.2%	103	17.9%	40	16.8%	63	16.0%	20	16.4%	37	18.6%	46	19.6%	63	14.2%	39	17.0%	17	18.9%	38	24.2%	48	0.0%	0
Tuesday	12.9%	77	10.3%	23	14.4%	54	15.2%	19	10.2%	23	14.2%	35	15.6%	50	9.9%	27	0.0%	0	25.9%	52	0.0%	0	25.3%	25
Wednesday	29.4%	176	24.7%	55	32.3%	121	30.4%	38	33.2%	75	25.5%	63	22.7%	73	37.2%	102	25.0%	25	24.9%	50	38.4%	76	25.3%	25
Thursday	3.3%	20	4.0%	9	2.9%	11	1.6%	2	2.2%	5	5.3%	13	3.7%	12	2.9%	8	8.0%	8	6.0%	12	0.0%	0	0.0%	0
Friday	16.2%	97	17.0%	38	15.7%	59	16.8%	21	16.8%	38	15.4%	38	14.0%	45	19.0%	52	24.0%	24	11.9%	24	12.1%	24	25.3%	25
Saturday	20.9%	125	26.0%	58	17.9%	67	20.0%	25	21.2%	48	21.1%	52	24.3%	78	16.8%	46	26.0%	26	12.4%	25	25.3%	50	24.2%	24
Base:		598		223		375		125		226		247		321		274		100		201		198		99

TOWN TOWN

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Baldock	16.7%	100	17.0%	38	16.5%	62	16.0%	20	16.8%	38	17.0%	42	15.0%	48	19.0%	52	100.0%	100	0.0%	0	0.0%	0	0.0%	0
Hitchin	33.6%	201	27.8%	62	37.1%	139	23.2%	29	27.4%	62	44.5%	110	40.8%	131	24.8%	68	0.0%	0	100.0%	201	0.0%	0	0.0%	0
Letchworth	33.1%	198	37.7%	84	30.4%	114	34.4%	43	36.3%	82	29.6%	73	33.6%	108	32.5%	89	0.0%	0	0.0%	0	100.0%	198	0.0%	0
Royston	16.6%	99	17.5%	39	16.0%	60	26.4%	33	19.5%	44	8.9%	22	10.6%	34	23.7%	65	0.0%	0	0.0%	0	0.0%	0	100.0%	99
Base:		598		223		375		125		226		247		321		274		100		201		198		99

LOC1 Baldock

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Baldock - Whitehorse Street	24.0%	24	28.9%	11	21.0%	13	15.0%	3	28.9%	11	23.8%	10	25.0%	12	23.1%	12	24.0%	24	0.0%	0	0.0%	0	0.0%	0
Baldock - High Street (near Tesco store)	25.0%	25	21.1%	8	27.4%	17	35.0%	7	31.6%	12	14.3%	6	27.1%	13	23.1%	12	25.0%	25	0.0%	0	0.0%	0	0.0%	0
Baldock - High Street (Near Simpson Drive)	26.0%	26	23.7%	9	27.4%	17	25.0%	5	18.4%	7	33.3%	14	20.8%	10	30.8%	16	26.0%	26	0.0%	0	0.0%	0	0.0%	0
Baldock - Letchworth Road	25.0%	25	26.3%	10	24.2%	15	25.0%	5	21.1%	8	28.6%	12	27.1%	13	23.1%	12	25.0%	25	0.0%	0	0.0%	0	0.0%	0
Base:		100		38		62		20		38		42		48		52		100		0		0		0

LOC2 Hitchin

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Hitchin - Market Place	19.9%	40	17.7%	11	20.9%	29	27.6%	8	17.7%	11	19.1%	21	18.3%	24	22.1%	15	0.0%	0	19.9%	40	0.0%	0	0.0%	0
Hitchin - High Street	16.9%	34	9.7%	6	20.1%	28	13.8%	4	21.0%	13	15.5%	17	15.3%	20	20.6%	14	0.0%	0	16.9%	34	0.0%	0	0.0%	0
Hitchin - Hermitage Road	13.9%	28	14.5%	9	13.7%	19	13.8%	4	12.9%	8	14.5%	16	15.3%	20	10.3%	7	0.0%	0	13.9%	28	0.0%	0	0.0%	0
Hitchin - Bancroft (Near Nightingale Road)	15.4%	31	22.6%	14	12.2%	17	10.3%	3	16.1%	10	16.4%	18	16.8%	22	13.2%	9	0.0%	0	15.4%	31	0.0%	0	0.0%	0
Hitchin - Bancroft (Near Brand Street)	16.9%	34	19.4%	12	15.8%	22	10.3%	3	19.4%	12	17.3%	19	18.3%	24	14.7%	10	0.0%	0	16.9%	34	0.0%	0	0.0%	0
Hitchin - Bucklersbury	16.9%	34	16.1%	10	17.3%	24	24.1%	7	12.9%	8	17.3%	19	16.0%	21	19.1%	13	0.0%	0	16.9%	34	0.0%	0	0.0%	0
Base:		201		62		139		29		62		110		131		68		0		201		0		0

LOC3 Letchworth

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Letchworth - Station Road	23.2%	46	23.8%	20	22.8%	26	20.9%	9	20.7%	17	27.4%	20	20.4%	22	25.8%	23	0.0%	0	0.0%	0	23.2%	46	0.0%	0
Letchworth - Leys Avenue (Near Station Place)	15.7%	31	16.7%	14	14.9%	17	18.6%	8	15.9%	13	13.7%	10	19.4%	21	11.2%	10	0.0%	0	0.0%	0	15.7%	31	0.0%	0
Letchworth - Leys Avenue (Near Norton Way South)	15.7%	31	14.3%	12	16.7%	19	23.3%	10	11.0%	9	16.4%	12	15.7%	17	15.7%	14	0.0%	0	0.0%	0	15.7%	31	0.0%	0
Letchworth - Eastcheap (Near Station Place)	15.2%	30	14.3%	12	15.8%	18	11.6%	5	17.1%	14	15.1%	11	15.7%	17	14.6%	13	0.0%	0	0.0%	0	15.2%	30	0.0%	0
Letchworth - Eastcheap (Near Gernon Road)	14.6%	29	9.5%	8	18.4%	21	18.6%	8	15.9%	13	11.0%	8	13.0%	14	16.9%	15	0.0%	0	0.0%	0	14.6%	29	0.0%	0
Letchworth - Broadway	15.7%	31	21.4%	18	11.4%	13	7.0%	3	19.5%	16	16.4%	12	15.7%	17	15.7%	14	0.0%	0	0.0%	0	15.7%	31	0.0%	0
Base:		198		84		114		43		82		73		108		89		0		0		198		0

LOC4 Royston

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
Royston - Melbourn Street	21.2%	21	20.5%	8	21.7%	13	18.2%	6	27.3%	12	13.6%	3	23.5%	8	20.0%	13	0.0%	0	0.0%	0	0.0%	0	21.2%	21
Royston - High Street (Near Market Hill)	21.2%	21	30.8%	12	15.0%	9	18.2%	6	18.2%	8	31.8%	7	14.7%	5	24.6%	16	0.0%	0	0.0%	0	0.0%	0	21.2%	21
Royston - High Street (Near bend to Upper King Street)	16.2%	16	12.8%	5	18.3%	11	9.1%	3	20.5%	9	18.2%	4	23.5%	8	12.3%	8	0.0%	0	0.0%	0	0.0%	0	16.2%	16
Royston - Baldock Street (near Somerfield)	17.2%	17	12.8%	5	20.0%	12	18.2%	6	18.2%	8	13.6%	3	17.6%	6	16.9%	11	0.0%	0	0.0%	0	0.0%	0	17.2%	17
Royston - Market Place Broadway	13.1%	13	7.7%	3	16.7%	10	18.2%	6	9.1%	4	13.6%	3	14.7%	5	12.3%	8	0.0%	0	0.0%	0	0.0%	0	13.1%	13
Royston - Market Hill	11.1%	11	15.4%	6	8.3%	5	18.2%	6	6.8%	3	9.1%	2	5.9%	2	13.8%	9	0.0%	0	0.0%	0	0.0%	0	11.1%	11
Base:		99		39		60		33		44		22		34		65		0		0		0		99

PC

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
AL4 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
AL6 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
AL7 2	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
AL7 4	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
AL8 6	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
AL8 9	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
CB11 4	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
CB22 7	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
CH46 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
CM13 3	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
CM23 3	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
CT2 7	0.2%	1	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
E1 8	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
EN11	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
EN11 0	0.5%	3	0.0%	0	0.8%	3	0.8%	1	0.4%	1	0.4%	1	0.3%	1	0.7%	2	3.0%	3	0.0%	0	0.0%	0	0.0%	0
EN9 2	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.0%	0	0.7%	2	1.0%	1	0.0%	0	0.0%	0	1.0%	1
HP2 7	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
LU1 3	0.3%	2	0.4%	1	0.3%	1	0.8%	1	0.0%	0	0.4%	1	0.6%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0
LU2 0	0.3%	2	0.4%	1	0.3%	1	0.8%	1	0.0%	0	0.4%	1	0.0%	0	0.7%	2	0.0%	0	1.0%	2	0.0%	0	0.0%	0
LU2 7	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
LU2 8	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
LU3 1	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
LU3 2	0.5%	3	0.4%	1	0.5%	2	0.8%	1	0.4%	1	0.4%	1	0.6%	2	0.4%	1	0.0%	0	1.5%	3	0.0%	0	0.0%	0
LU3 4	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.4%	1	0.4%	1	0.6%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0
LU4 9	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
LU5 5	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
LU6 3	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
MK10 9	0.2%	1	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
MK40 1	0.2%	1	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
MK40 2	0.5%	3	0.4%	1	0.5%	2	0.0%	0	1.3%	3	0.0%	0	0.6%	2	0.4%	1	0.0%	0	1.5%	3	0.0%	0	0.0%	0
MK40 3	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
MK41 9	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.0%	0	0.8%	2	0.3%	1	0.4%	1	0.0%	0	0.5%	1	0.5%	1	0.0%	0
MK42 0	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
MK42 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
MK43 0	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
MK44 3	1.0%	6	0.9%	2	1.1%	4	0.0%	0	1.3%	3	1.2%	3	0.6%	2	1.5%	4	1.0%	1	1.5%	3	1.0%	2	0.0%	0
MK45 2	0.3%	2	0.9%	2	0.0%	0	0.0%	0	0.4%	1	0.4%	1	0.0%	0	0.7%	2	0.0%	0	0.5%	1	0.5%	1	0.0%	0
MK45 4	0.5%	3	0.9%	2	0.3%	1	0.0%	0	0.9%	2	0.4%	1	0.9%	3	0.0%	0	0.0%	0	1.5%	3	0.0%	0	0.0%	0
NN10	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
PE19 1	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
PE19 2	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
PE19 8	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.3%	1	0.4%	1	0.0%	0	0.5%	1	0.5%	1	0.0%	0
PE29 3	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG0 1	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG1 1	0.7%	4	0.9%	2	0.5%	2	0.8%	1	0.0%	0	1.2%	3	0.6%	2	0.7%	2	0.0%	0	1.0%	2	1.0%	2	0.0%	0

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
SG1 2	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG1 3	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG1 4	0.5%	3	0.0%	0	0.8%	3	1.6%	2	0.4%	1	0.0%	0	0.6%	2	0.4%	1	0.0%	0	1.0%	2	0.5%	1	0.0%	0
SG1 5	0.3%	2	0.0%	0	0.5%	2	0.8%	1	0.0%	0	0.4%	1	0.3%	1	0.4%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0
SG1 7	0.2%	1	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
SG12	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	1.0%	1	0.0%	0	0.0%	0	0.0%	0
SG12 0	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG15 4	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG15 5	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG15 6	1.7%	10	0.9%	2	2.1%	8	0.8%	1	2.7%	6	1.2%	3	2.5%	8	0.7%	2	0.0%	0	2.0%	4	3.0%	6	0.0%	0
SG16 6	0.8%	5	0.4%	1	1.1%	4	0.0%	0	0.4%	1	1.6%	4	0.6%	2	0.7%	2	0.0%	0	2.0%	4	0.5%	1	0.0%	0
SG16 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG17 5	1.8%	11	0.9%	2	2.4%	9	0.0%	0	1.3%	3	3.2%	8	1.6%	5	2.2%	6	0.0%	0	3.5%	7	2.0%	4	0.0%	0
SG18 6	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG18 8	0.7%	4	0.9%	2	0.5%	2	0.0%	0	0.9%	2	0.8%	2	0.6%	2	0.7%	2	0.0%	0	1.5%	3	0.5%	1	0.0%	0
SG18 9	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.6%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0
SG19 1	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.4%	1	0.4%	1	0.3%	1	0.4%	1	0.0%	0	0.5%	1	0.5%	1	0.0%	0
SG19 2	0.3%	2	0.0%	0	0.5%	2	0.8%	1	0.4%	1	0.0%	0	0.0%	0	0.7%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0
SG19 4	0.3%	2	0.0%	0	0.5%	2	0.0%	0	0.9%	2	0.0%	0	0.0%	0	0.7%	2	0.0%	0	0.5%	1	0.5%	1	0.0%	0
SG2 7	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG2 9	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG3 6	0.2%	1	0.4%	1	0.0%	0	0.8%	1	0.0%	0	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG4	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG4 0	3.3%	20	3.1%	7	3.5%	13	2.4%	3	3.1%	7	4.0%	10	2.8%	9	4.0%	11	1.0%	1	7.5%	15	2.0%	4	0.0%	0
SG4 2	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
SG4 7	1.3%	8	0.9%	2	1.6%	6	0.8%	1	1.3%	3	1.6%	4	2.2%	7	0.4%	1	0.0%	0	3.5%	7	0.5%	1	0.0%	0
SG4 8	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.4%	1	0.4%	1	0.6%	2	0.0%	0	0.0%	0	1.0%	2	0.0%	0	0.0%	0
SG4 9	5.0%	30	4.5%	10	5.3%	20	4.0%	5	3.1%	7	7.3%	18	7.5%	24	2.2%	6	0.0%	0	14.9%	30	0.0%	0	0.0%	0
SG5	0.3%	2	0.4%	1	0.3%	1	0.0%	0	0.0%	0	0.8%	2	0.3%	1	0.4%	1	0.0%	0	1.0%	2	0.0%	0	0.0%	0
SG5 1	3.7%	22	2.2%	5	4.5%	17	3.2%	4	2.2%	5	5.3%	13	4.1%	13	3.3%	9	0.0%	0	9.5%	19	1.5%	3	0.0%	0
SG5 2	4.7%	28	5.4%	12	4.3%	16	4.0%	5	3.5%	8	6.1%	15	5.0%	16	4.4%	12	0.0%	0	11.9%	24	2.0%	4	0.0%	0
SG5 3	2.3%	14	0.9%	2	3.2%	12	1.6%	2	1.8%	4	3.2%	8	3.1%	10	1.5%	4	0.0%	0	7.0%	14	0.0%	0	0.0%	0
SG5 4	1.5%	9	1.8%	4	1.3%	5	1.6%	2	1.3%	3	1.6%	4	1.6%	5	1.5%	4	3.0%	3	1.5%	3	1.5%	3	0.0%	0
SG5 7	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG6	1.2%	7	1.3%	3	1.1%	4	1.6%	2	1.8%	4	0.4%	1	0.9%	3	1.5%	4	0.0%	0	0.0%	0	3.5%	7	0.0%	0
SG6 1	5.2%	31	5.4%	12	5.1%	19	5.6%	7	5.8%	13	4.5%	11	4.4%	14	6.2%	17	3.0%	3	0.5%	1	13.6%	27	0.0%	0
SG6 2	3.8%	23	4.0%	9	3.7%	14	3.2%	4	3.1%	7	4.9%	12	4.7%	15	2.9%	8	0.0%	0	0.5%	1	11.1%	22	0.0%	0
SG6 3	5.9%	35	8.1%	18	4.5%	17	5.6%	7	6.6%	15	5.3%	13	7.8%	25	3.7%	10	1.0%	1	0.0%	0	17.2%	34	0.0%	0
SG6 4	7.0%	42	6.7%	15	7.2%	27	4.8%	6	8.0%	18	7.3%	18	7.2%	23	6.6%	18	2.0%	2	1.5%	3	18.7%	37	0.0%	0
SG6 7	0.3%	2	0.4%	1	0.3%	1	0.8%	1	0.0%	0	0.4%	1	0.0%	0	0.7%	2	2.0%	2	0.0%	0	0.0%	0	0.0%	0
SG6 9	0.2%	1	0.0%	0	0.3%	1	0.8%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.5%	1	0.0%	0	0.0%	0
SG7	0.8%	5	1.3%	3	0.5%	2	1.6%	2	0.9%	2	0.4%	1	0.6%	2	1.1%	3	5.0%	5	0.0%	0	0.0%	0	0.0%	0
SG7 5	2.7%	16	3.6%	8	2.1%	8	0.8%	1	0.4%	1	5.7%	14	3.1%	10	2.2%	6	12.0%	12	0.5%	1	1.5%	3	0.0%	0
SG7 6	6.7%	40	7.6%	17	6.1%	23	8.0%	10	4.9%	11	7.7%	19	7.2%	23	6.2%	17	37.0%	37	0.5%	1	0.5%	1	1.0%	1
SG8	1.0%	6	1.8%	4	0.5%	2	2.4%	3	0.9%	2	0.4%	1	0.3%	1	1.8%	5	3.0%	3	0.0%	0	0.0%	0	3.0%	3
SG8 0	0.7%	4	0.0%	0	1.1%	4	0.0%	0	0.4%	1	1.2%	3	0.9%	3	0.4%	1	1.0%	1	0.5%	1	1.0%	2	0.0%	0
SG8 5	6.4%	38	4.0%	9	7.7%	29	12.0%	15	7.5%	17	2.4%	6	4.4%	14	8.8%	24	1.0%	1	0.0%	0	0.5%	1	36.4%	36

	Total		Male		Female		18 - 34		35 - 54		55 +		ABC1		C2DE		Baldock		Hitchin		Letchworth		Royston	
SG8 6	0.7%	4	0.9%	2	0.5%	2	1.6%	2	0.4%	1	0.4%	1	0.9%	3	0.4%	1	1.0%	1	0.0%	0	1.0%	2	1.0%	1
SG8 7	2.7%	16	3.1%	7	2.4%	9	4.0%	5	4.4%	10	0.4%	1	2.5%	8	2.9%	8	2.0%	2	0.0%	0	0.0%	0	14.1%	14
SG8 8	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
SG8 9	6.7%	40	7.2%	16	6.4%	24	9.6%	12	7.5%	17	4.5%	11	3.7%	12	10.2%	28	4.0%	4	0.0%	0	0.5%	1	35.4%	35
SG9 0	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.0%	0	0.4%	1	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
SG9 3	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.3%	1	0.0%	0	1.0%	1	0.0%	0	0.0%	0	0.0%	0
SG9 9	0.2%	1	0.0%	0	0.3%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.0%	0	1.0%	1
SL6	0.2%	1	0.4%	1	0.0%	0	0.0%	0	0.0%	0	0.4%	1	0.0%	0	0.4%	1	0.0%	0	0.0%	0	0.5%	1	0.0%	0
Refused	3.7%	22	5.8%	13	2.4%	9	4.8%	6	4.0%	9	2.8%	7	2.8%	9	4.4%	12	6.0%	6	1.5%	3	4.0%	8	5.1%	5
Base:		598		223		375		125		226		247		321		274		100		201		198		99

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