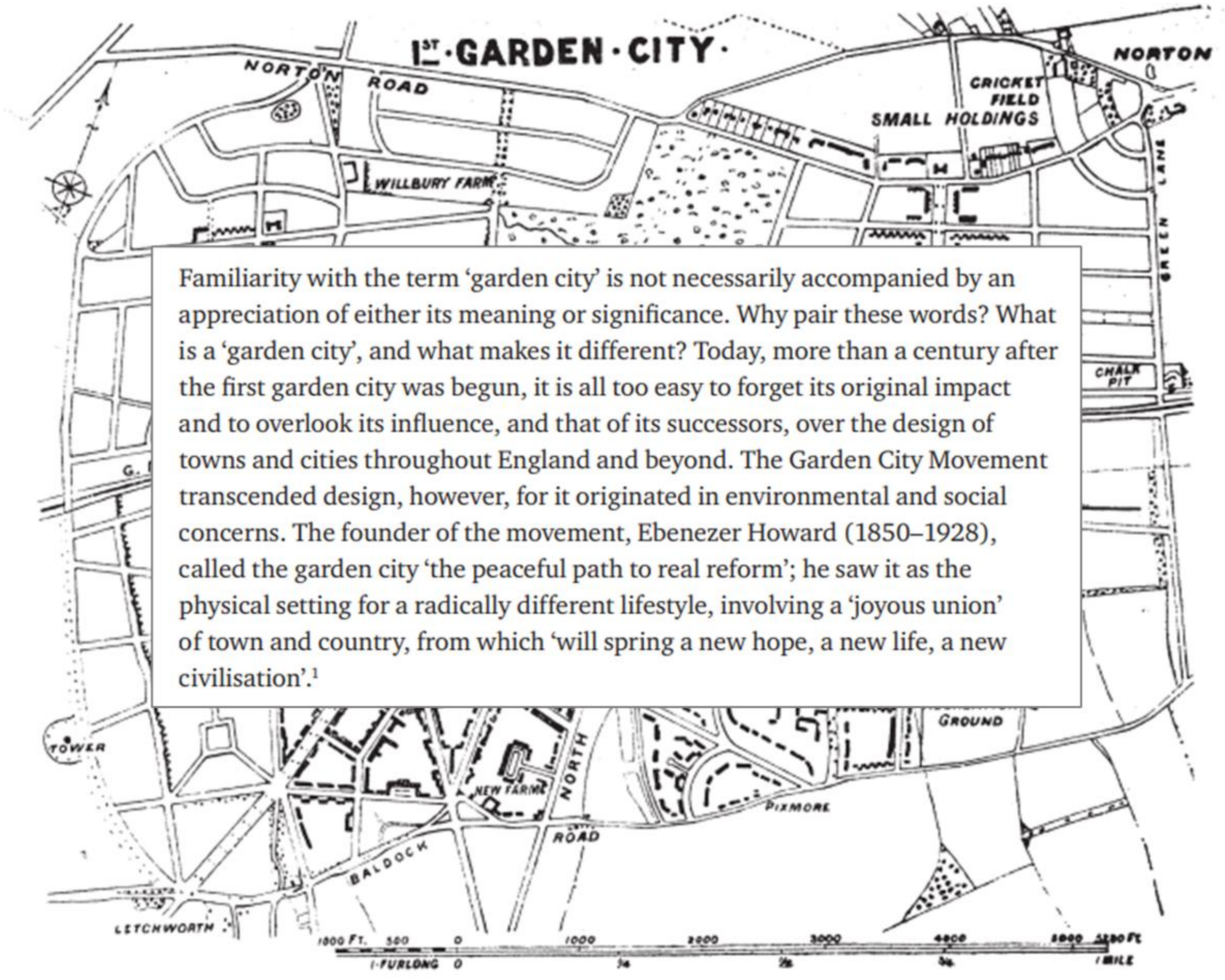
Letchworth Town Centre Recovery & Development Plan

(July 2022)

Letchworth Town Centre
Recovery & Development Plan

This report has been produced for North Herts Council with support from the European Regional Development Fund through the Department for Levelling Up, Housing Communities and in association with Love Letchworth BID, the Letchworth Garden City Heritage Foundation and Hertfordshire County Council..

The report was prepared by Chris Wade & Jekaterina Ancane of the People & Places Partnership, based on survey work undertaken in Letchworth Garden City during spring 2022.



Familiarity with the term 'garden city' is not necessarily accompanied by an appreciation of either its meaning or significance. Why pair these words? What is a 'garden city', and what makes it different? Today, more than a century after the first garden city was begun, it is all too easy to forget its original impact and to overlook its influence, and that of its successors, over the design of towns and cities throughout England and beyond. The Garden City Movement transcended design, however, for it originated in environmental and social concerns. The founder of the movement, Ebenezer Howard (1850–1928), called the garden city 'the peaceful path to real reform'; he saw it as the physical setting for a radically different lifestyle, involving a 'joyous union' of town and country, from which 'will spring a new hope, a new life, a new civilisation'.[1]

[1] English Heritage, 2010. *English Garden Cities; an Introduction*

Executive Summary

Introduction

This work uses a tried and tested methodology developed by the People & Places Partnership as a basis for preparing a COVID-19 Recovery and Development Plan for Letchworth Garden City town centre on behalf of North Hertfordshire Council.

It is part of a District-wide initiative taken by the Council to work with key stakeholders in Hitchin, Baldock, Royston and Letchworth Garden City. This seeks to map out both a high level strategic and effective COVID recovery plan for its town centres in the short-term, and a medium- and longer-term development strategy framework to assist the town centres develop successfully over the next decade.

This report follows the methodology prepared nationally by the People & Places Partnership for the Local Government Association to guide the local leadership of town centre revitalisation. In-line with the requirements of North Herts Council, this methodology focuses on helping local the council and local partners to develop a 'Forward Framework' that focus on both the 'what' and the 'how' of town centre recovery and development.

Review: Existing Strategies

Review of existing strategies

Work to prepare the Letchworth Town Centre Recovery Development Plan commenced with engagement with members of the Town Centre Strategy Group and a detailed desktop review and analysis of existing local strategies, relating to Letchworth town centre. The findings of this strategy review are presented using the town centre revitalisation themes provided in the LGA toolkit.

Planning and property

North Hertfordshire Local Plan 2011-2031

The North Hertfordshire Local Plan sets out a strategic vision and spatial strategy for the District over the period 2011 to 2031. AS part of this the Local Plan seeks to promote, protect and enhance the provision of shops, financial and professional services, café or restaurants, pubs or drinking establishments or takeaways in the main centres of Hitchin, Letchworth Garden City, Baldock and Royston.

The Local Plan recognises that Baldock, Hitchin and Letchworth Garden City have significant overlapping markets, with spend leakage from Letchworth Garden City to Hitchin. The Plan acknowledges that Letchworth Garden City has a higher physical capacity to accommodate new businesses over the plan period, and it is therefore marked as capable to provide physical space and to recapture its leakage.

The Local Plan aims to ensure that the town centres maintain their primary retail function whilst increasing their diversity with a range of complementary uses, promoting competitive and flexible town centre environments. It is proposed that this be achieved by monitoring and the strategic allocation of retail primary frontages, avoiding appearance of non-retail uses that can create 'dead frontages'.

The Local Plan also allocated twelve sites within Letchworth's' administrative area with an estimated 1,485 additional dwellings to be built over the plan period. It is important that new housing development can increase opportunities for existing and new residents to access non-car modes of transport to travel to the town centre.

The North Hertfordshire Retail Study also assessed the potential for commercial leisure and other town centre uses with a focus on family leisure activities and at the time proposed Letchworth as a primary location for a potential cinema and fitness centres.

North Herts Council Climate Change Strategy 2021-2026

The North Herts Climate Change Strategy outlines the Council's commitment to contributing to the reduction of carbon emission and while not outlining town centre related policies in particular, it influences activities managed by the Council, including planned new developments and green infrastructure.

The Wynd Masterplan & Letchworth Town Centre Implementation Plan (2011)

The Wynd Masterplan and Letchworth Town Centre Implementation Plan was prepared on behalf of the Letchworth Garden City Foundation, over a decade ago. The Implementation Plan provided detailed analysis of the town centre's physical environment and function that can still form a basis for current town centre development planning.

In terms of planning and property, the Plan included a valuable restatement of the Garden City's original goals and the current condition in relation to these. The overall approach proposed in the Letchworth Town Centre Implementation Plan was to look to Letchworth's current strengths and further enhance these. It is an approach that still seems valid over a decade later. It was proposed that Letchworth has several key assets that provide unique appeal and could be capitalised on to strengthen the town's identity.

Parking, travel and access

The Letchworth Town Centre Implementation Plan included broad proposals for improving transport, movement and parking in the town centre that mostly still seem apt today. These included exploring the potential to establish cycle networks connecting the town centre to the Greenway and improving the role of the rail station as a transport hub. The Implementation Plan recognised that Letchworth is relatively well served by car parks, with an oversupply of spaces, however these are not often of high quality.

Letchworth Sustainable Travel Town Plan

The Letchworth Sustainable Travel Town Plan forms part of Hertfordshire County Council's Local Transport Plan, and aims to increase the number of people walking, cycling and using public transport in the town. The Plan states that the County Council fully supports the re-allocation of road space to introduce measures such as bus and cycle lanes across Letchworth. The Travel Plan also supports the improvement of public bus facilities, ensuring that these are more attractive, convenient and direct.

In parallel and as part of development plans for new housing, the Letchworth Garden City Heritage Foundation has developed comparable transport plans including proposals the preparation of a Cycling Strategy the potential ways that new developments could help support improved bus provision.

Streetscape and public realm

The Letchworth Town Centre Implementation Plan contains detailed urban design analysis that could form the basis for an updated review. It covered town-wide movement; location of community services; sustainable transport; legibility; frontages; public realm quality; car parking; retail composition and building use. The Implementation Plan also included broad recommendations for enhancing the town centre green spaces.

The Letchworth BID Business Plan contains a broad objective and proposed detailed activities and impact measures for relating to enhancing the towns streetscape and accessibility, including maintaining and enhancing the usability, appearance and vibrancy of the streets and open spaces and addressing signage to encourage people to explore and make more use of the town and all it has to offer.

Culture and heritage

Letchworth Garden City Heritage Foundation Letchworth Garden City Heritage Foundation Strategic Plan (2021)

The Heritage Foundation's revised Strategic Plan articulates wide community ambitions for the Garden City alongside the work of key partners. The Strategic Plan focuses on improving life chances, making Letchworth a great place to live, driving investment in the town and initiating a financial recovery roadmap in response to COVID-19's impact. Proposed actions relevant to town centre recovery and revitalisation include: launching a Great Outdoors campaign to encourage people to use the Garden City Greenway and other green open spaces and taking a leadership role to advocate for investment to address the needs in the town.

Heritage Foundation Letchworth's Culture Strategy to 2026

Letchworth's Culture Strategy published by Letchworth Garden City Heritage Foundation, places culture at the heart of delivering sustainable, people focused improvements for the community, visitors and the creative businesses.

The Strategy's first of three 'promises' is closely related to branding and promotion to increase visits to the town through strengthening the town's cultural identity and quality of provision, including increasing young people's engagement with the arts and the Letchworth Garden City story.

The Cultural Strategy's second promise highlights the importance of targeted engagement with identified audiences in a way that provides in-depth promotion of the town's cultural offer. This will include enabling all children, young people and families to learn about the history of the town and engage with cultural opportunities.

The Strategy's third promise seeks to enable delivery through supporting existing cultural service practitioners, growing local talent and encouraging new providers to fill in the gaps. This will include creating a physical and digital communications platform for local practitioners to share skills, promote activities/events and showcase all that Letchworth has to offer.

Business Support

The Local Plan vision for North Hertfordshire aims to build robust and prosperous economy with a greater mix of skilled jobs, focused in locations that best support the District's growing population, with a particular emphasis on support for small local businesses.

Letchworth BID Proposal & Business Plan 2019-2024

The Letchworth Business Improvement District (BID) works to support businesses in improving the trading environment and promotion of the town. The draft Business Plan presented a very broad vision for the town. The BID seeks to help achieve this through its business-led programme of investment including as a 21st century Garden City which is connected and engaged with its residential and business community.

The Business plan contains details of proposed activities and impacts monitors against three objectives including one specifically identifying is role in bringing businesses together to represent their collective voice for the town centre. This is designed to ensure that the town centre continues to develop into a great place to do business and meets the needs of those who live, work, visit and do business in Letchworth.

The Letchworth BID web site summarises its workstream as four types of activities aimed at improving the trading environment for businesses and therefore contributing to delivering the ambitious vision. This includes organising events and promotional activities; reviewing access and parking; promoting and developing what Letchworth Garden City has to offer.

Letchworth's Culture Strategy seeks specifically to support the town's cultural practitioners to develop their skills and secure opportunities to grow their businesses.

Strategy for Clean Growth in Hertfordshire

Hertfordshire LEP has recently launched its Strategy for Clean Growth in Hertfordshire. It will be important for new and existing business in Letchworth to be aware of the opportunities it presents to build on its environmental heritage to develop a green economy through the growth of the Low Carbon Environmental Goods and Services (LCEGS) sector and delivering transformation for all parts of the existing economy.

Place branding and marketing

The Letchworth BID Business Plan contains a broad objective and proposed detailed activities relating to place branding and marketing. Proposals for creating a place which is lively, has a strong sense of identity and awareness, including defining, developing and promoting a brand identity of Letchworth town centre which articulates its strengths, characteristics and heritage. This includes increasing awareness of Letchworth as a destination by using digital and social media channels, traditional marketing and PR in a way which is consistent with its brand. It also includes organising a programme events and activities to create an animated feel to the town centre.

The BID has recently undertaken its own branding exercise as an organisation including the preparation of a new logo that acknowledges Letchworth's Garden City origins.

North Herts have also commissioned a branding exercise for the District. Letchworth Garden City needs to be identified as a distinctive element within this as well as part of the key axis with Baldock and Hitchin.

Digital technology and data

While there is no specific social media or digital strategy for Letchworth, it is a recognised part Letchworth BID's promotional work to use "digital and social media channels… in a way which is consistent with its brand". The Heritage Foundation's Cultural Strategy similarly proposes to "create a physical and digital communications platform for local practitioners".

A variety of web sites and social media platforms exist to promote different aspects of the town. Whilst each of these sites serves slightly different audiences and organisational roles, it will be important to coordinate and clarify the town's digital footprint.

North Herts Council has recently adopted a new mobile phone-based footfall monitoring system for Letchworth as part of a wider scheme with other East and North Herts towns. This system will potentially give very useful baseline data as well as routine updates to understand the changing use of the Letchworth town centre post-pandemic, with benchmarking possible with neighbouring towns.

Evidence: The Survey Findings

The place

The business mix

The business data for Letchworth indicates that current retail services focus on provision of goods for home, luxury and personal care, with a low provision of fashion related comparison retail indicating that some requirements will need to be met elsewhere. While the proportion of convenience retail outlets is relatively low (6%), it is capable of serving much of the existing, local needs including through a town centre supermarket and smaller grocery stores. The combined proportion of comparison and convenience retail (46%) is only slightly lower than that of similarly sized towns (49%), as a result of the mix of other businesses.

The proportion of hospitality businesses is slightly higher when compared to other larger towns, indicating that town centre serves its social and leisure function well. Letchworth's professional service and office space provision is slightly lower than national average as a proportion though includes some sizeable premises on the edge of the centre that help contribute footfall.

Levels of Sui Generis uses (13%) are slightly higher compared to towns nationally (7%) and indicate presence of other diverse services.

Overall, the Letchworth town centre business mix seems suited to meeting the needs of local residents in terms of food staples, household goods, social life and civic function. Its business mix can be appealing to visitors in terms of its luxury retail, hospitality and leisure offer.

Examining the retail mix specifically, reveals that nearly nine-in-ten of the Letchworth town centre shops are comparison retailers (88%). This proportion is slightly more than benchmarked, large towns nationally, though indicates that Letchworth town centre has a healthy balance of comparison and convenience retailers. However, it will be important for the comparison shops to have a distinctive offer pitched at local customers and/or potential visitors, to fend off competition from neighbouring centres and online. Modest increases in convenience, grocery retail would help encourage more regular footfall and movement around the centre.

The data for Letchworth indicates that there are 5 key attracts in the town centre. And that the combined proportion of national multiples (18%) and regional multiples (8%) is lower than large towns nationally (35%). Such a proportion indicates that the town is a local service centre that meets most of its residents' needs. It offers some of the popular brands, however some demand by the users is probably not currently met locally. In contrast, proportion of independent businesses in Letchworth (72%) is higher than the national benchmark (57%) and thus could be used as part of a distinctive marketing message about the characteristic identity of the town centre and distinctiveness of products available.

Vacant business units

The vacancy data for Letchworth indicates there are 7% of unoccupied units in the town centre which is lower than the level for benchmarked large towns nationally (13%). This indicates that available premises are being let comparably well, though some areas of the town centre have higher concentrations of vacant units.

Footfall

Whilst footfall monitoring was not part of this survey work for Letchworth, footfall data is available through a new monitoring system available through North Herts Council. A template is provided showing the normal data that People & Places would look to assess using such a system.

Car parking

The Initial data collected for 3 public car parks and 2 private car park serving Letchworth town centre shows there are a total of 913 spaces. The ratio of short-term (43%) to long-term (57%) parking is representative of the national benchmark. Of those spaces offered on a long-term basis, 428 are in public car parks. A further 174 spaces are available in more peripheral sites around Norton Common serving the bowling club and swimming pool principally.

The people

Response to business survey

Survey forms were electronically distributed to all the town centre businesses in Letchworth. The following percentage figures are based on the 64 returned business confidence surveys from a total of 249 town centre businesses and organisations. This is a return rate of 26% compared to 25% nationally and suggests reasonable level of interest within the town's business community. It is also indicative of a presence of independent retailers that are often owner-managed and more engaged in partnership working.

Of the businesses that responded to the survey, 49% were shops of some kind, 14% were providers of services, 16% were hospitality businesses and 22% defined themselves in the category of other providing services of a various kind. This is broadly representative of the town centre's business mix. Similarly, 82% of these respondents were independent businesses and this is also broadly representative. A total of 60% of these businesses are long-established in Letchworth, having been based there for more than six years. This compares to 70% of business in benchmarked towns nationally. The fact that 11% of Letchworth's businesses surveyed had been established for less than a year, may indicate significantly higher turnover in the town's traders, compared to towns nationally.

Business performance

Businesses were impacted in different ways by the pandemic before the December 2021. A small number (8%) of businesses who responded said that the year of pandemic had a positive impact on profits with 11% reporting this was "strongly positive". In contrast, 26% of businesses reported that profits were negatively impacted, with 43% saying the reduction was "strongly negative".

When asked about projected impact on business profits over the next 12 months from March 2022, compared to pre-pandemic trading, 26% were positive about potential impact and 10% were "strongly positive". The survey responses indicated that 26% of businesses expect a moderately negative impact on profit compared to pre-pandemic levels, and 11% expected this impact to be "strongly negative".

Response to customer survey

A large sample of 707 Letchworth town centre users were surveyed online through social media using the help of local community partners. Nearly three-quarters (72%) of respondents were female, which is a higher proportion compared to surveys conducted in towns nationally (64%). There was healthy participation amongst all age groups, with 36-45s providing the highest number of responses.

It is evident from the responses that the majority of customers surveyed (41%) typically visit Letchworth for everyday convenience shopping and everyday services such as food shopping. The second most popular purpose of a visit (39%) is for leisure and likely to include socialising, activities as well as visiting many pubs and cafes located in the town centre. Comments listed as 'other' mostly included a blend of all the suggested activities, exercising, use of outdoor spaces, specialised shopping and commute. Despite the number of comparison retailers in the town centre, only 4% of respondents said that such shopping for fashion, gifts and household goods was the main purpose of their visits.

Analysis of the 707 responses received from town centre users reveals that a significant proportion (53%) of town centre users have decreased their frequency of visits to Letchworth town centre due to the COVID-19 pandemic. Interestingly, 16% of users said that they have been visiting the town centre more frequently, and 31% have not changed how often they visit.

As part of the survey, users were asked which other local towns they visit regularly, making at least one trip per month. Hitchin appeared to be visited by 62% of respondents, Stevenage is visited by 32% and Baldock by 21%. Within the category of 'other, (23%), Biggleswade and Welwyn appeared as the most popular options.

When asked how often users visit town centre now, 43% of users responded that are visiting town centre more than once a week, 25% making their visits weekly and only 9% responded that they are visiting Letchworth daily. 7% of users are visiting Letchworth fortnightly and another 4% are infrequent users who visit Letchworth once a month or less. 5% of respondents, have visited Letchworth only once.

Answering a question on the duration of their visit, more than a half of users (56%) said that they are spending one to two hours in town, while another quarter (26%) of customers are in and out of the town centre within one hour. A further 16% dwell up to 4 hours, 1% are spending more than 4 hours and 2% are staying in the town centre for the whole day.

As part of the Letchworth survey, town centre users were asked about their preferred primary and secondary methods of travelling into town. The responses on travel to town show that on foot (50%) and car (47%) are the preferred primary methods of travel to town. This is unlike trends for large towns nationally, where commuting via car tends to dominate on foot. Travelling to town by car (45%) and on foot (38%) are also the most popular secondary choices, followed by cycling (7%), bus (4%), taxi (4%) and train (2%). The high number of users who prefer walking suggests that Letchworth's town centre is well connected to nearby residential areas and provides its users with convenient walking routes.

The positives & negatives

Positive perceptions

Letchworth town centre businesses were first asked about their opinions on the town centre's appeal. From the responses to the survey, businesses appear most positive about the town's public spaces (78%), pedestrian access (76%) and cleanliness (74%). They are also moderately positive about outdoor seating for hospitality (65%) and safety (61%), and appreciate the physical appearance (50%) and potential of local customers (41%) offered by the town centre. Furthermore, businesses are majorly indifferent to the local partnerships (60%), the online identity of the town (57%), leisure and cultural facilities (57%) and events and activities (48%).

Subsequently businesses were asked about their perceptions of the town's trading environment. In this case businesses appeared to be strongly positive about the town's cafes & restaurants (77%), followed by the availability of walking and cycling routes to town (53%) and road links (52%). Responses showed that businesses are majorly indifferent to prosperity of the town (64%), availability of suitable staff (62%), public transport services (60%), availability of premises (57%) and pubs and bars (56%).

When asked about the town centre environment, customers were very positive about pedestrian access (84%), convenience (83%), cleanliness (75%), public spaces (74%) and outdoor seating for hospitality (70%). They were also positive about road links (67%), the physical appearance (66%) and built heritage (64%). Users also highly valued safety (59%), walking and cycling routes (56%), leisure and cultural facilities (55%) and provision of events and activities (51%). A majority of town centre users felt indifferent about public transport (62%), online information and promotion (47%) and traffic (40%).

Subsequently, customers were asked to indicate what are the positives and negatives of the current provision of town centre services and businesses. Aspect that received by far the most positive response was provision of cafes and restaurants (80%). Customers were also positive about Letchworth's health services (67%), retail grocery offer (66%) and customer service (61%) and appreciated independent shops (51%), access to banks and ATM's (50%), pubs and bars (46%) and offer of value for money (42%). Customers were majorly indifferent towards value for money retail (47%), evening economy (41%) and national chains (38%).

Negative perceptions

When asked about town centre's appeal, businesses appeared to be most negative about the potential of tourist customers (54%), out-of-town competition (52%), markets (48%) and existing offer if compared to nearby towns (43%).

Businesses identified rental values (40%), parking (on-street (31%) and off-street (21%) and daytime economy (26%), as the most negative aspects of town trading environment.

Customers identified the negative aspects of Letchworth's town centre's environment as on-street parking (27%), followed by leisure and cultural facilities (17%), online promotion (16%), off-street parking (15%) and events and activities (15%).

Negative expressions about Letchworth town centre's businesses and services covered the comparison retail offer such as clothes and gifts (62%), provision of national chains (48%) and the overall mix of businesses (46%). Other topics that received some negative responses were independent shops (25%), access to banks and ATM's (23%), pubs and bars (21%) and the evening economy (20%). Generally, responses appeared to be more positive than those expressed nationally, and with even these highest negative ratings being relatively low.

Customer sentiments

A word cloud was created from the single words most popularly used by town centre users to sum-up Letchworth. Such a word cloud, whilst only indicative, is useful in understanding how the town centre is perceived by current users who are familiar with it. It gives a visual representation of sentiments and can be helpful in determining how the town can be honestly promoted to potential new users in a way that creates achievable expectations. Many of the most prominent words used for Letchworth are negative, such as declining, boring, lacking, empty, tired and unexciting. In contrast, positive sentiments are expressed through words such as potential, evolving, unique, welcoming, improving and bustling.

When asked how their experience of Letchworth town centre had changed in recent years, 26% of town users said it had improved and a further 26% stated that it had changed in a mixture of good and bad ways, followed by 17% saying that the experience has remained the same. While 29% of respondents said that their experience had worsened, this is a significantly smaller proportion than that of the national response. This indicates that there are opportunities and space for improvement to support the already generally positive opinion about how the town is changing.

When users were asked if they would recommend a visit to Letchworth town centre, 422 out of 620 of users said 'yes', which indicates that more than two-thirds (68%) of users believe it would provide a positive experience for new visitors. Such response is representative and even slightly higher than the one expressed nationally (66%), showing that the town centre is appreciated by local users.

Future priorities

Businesses' priorities

When businesses in Letchworth were asked to propose two suggestions to improve the town centre, the top priority for businesses was promotion of the town through events, better marketing and the visitor economy (25%). There were specific sentiments to improve digital promotion of the town in additional to regular marketing.

This was followed closely by sentiments regarding the retail and business mix (19%), highlighting a need to diversify and/or better promote the variety of current offer.

The third priority for businesses surveyed focused on issues related to parking and travel management and provision (18%). Sentiments were related to improving the management of traffic and the one way system, calls for a reduction in parking costs and duration of stay limits, and improved cycling routes and wider pedestrianisation.

Appearance & signage was mentioned in 13% of responses, with sentiments made regarding improved way finding, around the Wynd in particular, and better provision and maintenance of outdoors and greenspace.

Customers' priorities

When Letchworth customers were asked what two things would improve the town centre, the theme receiving 50% of total number of comments was the one related to the town's retail, hospitality & general business mix (574). Within this theme, sentiments regarding the general lack of retail and business diversity (216) generated almost half of all comments received. Other comments related to the same category indicated high levels of priority about the fashion retail mix (119) with particular sentiments in relation to the lack of men's fashion outlets, a need for more independent businesses (83) and a lack of key attractors, high street and chain retailers (44). There was a high number of comments (78) in relation to hospitality mix, with sentiments regarding a perceived lack of diversity in restaurant and bar provision. Furthermore, there were requests for a more regular or permanent market (23) and increased opening hours for existing businesses (11).

Themes on appearance and signage (139) and parking and travel (131) gathered similar number of comments. Within the first theme, comments were divided between appearance (28), maintenance of buildings and shopping centres in particular, greenspace (26) in terms of provision of greenery to reflect the identity of the "garden city", public outdoor seating (22) and requests to retain outdoor seating for hospitality (22).

For parking and travel, the majority of comments expressed sought pedestrianisation of central areas (51), including Leys Avenue in particular, on either a permanent or weekend basis. Other comments covered space for improvement in parking management (31), parking costs (22), traffic management (13), improved cycling facilities (10) and public transport (4).

Within property, rents and rates theme (96), two thirds of comments expressed concerns regarding empty properties within the town centre (65), followed by comments regarding high rents and rates (31).

The local leadership and social issues theme (70) highlighted concerns regarding current planning and developments (43), suggesting that the town centre can be best improved through modernisation, change of uses, and more defined focal point. Other comments indicated concerns of safety (16) and antisocial behaviour (4).

The visitor economy, promotion and events theme (63) received a significant number of comments expressing a desire increase the number of public events and festivals (46), improve promotion among visitors and locals (10) and expand evening and night economy (9).

Within the public amenities theme (51), sentiments were related to improved provision of family and leisure activities (28), with several comments indicating a wish for a better soft play area, playground, and other facilities to be attended by families with kids. Furthermore, a need for diverse community space (18) appeared, with particular focus on meeting spaces for young groups and elderly residents.

Digital Development

Businesses' digital drive

For businesses, fast broadband connection across the town centre received the highest total number of priority and high priority responses (73% combined) followed by the use of social media for online promotion (72%). Further, businesses prioritised website management (67%) and Wi-Fi coverage (625).

Customers' digital drive

This report concludes with potential themes and a forward framework for guiding the 'how' and the 'what' of town centre recovery and revitalisation in Letchworth Garden City. The themes can be used to bring stakeholders together and use the forward framework's template as a basis for preparing a detailed delivery plan by partners with budgets, responsibilities, defined outcomes and measurable indicators of success.

Use of social media and insights about businesses, products, places to eat, things to do (59%) received the highest response as a priority or high priority amongst digital development options amongst town centre's customers. This is followed by regular updates from businesses about special offers and things to do (53%), digital phone network coverage (46%) and town centre Wi-Fi coverage (41%). This indicates the significance of online promotion and interaction across customers' preferences.

Local Leadership: Creating a Forward Framework

Letchworth's Forward Framework

Revitalising a town centre is a complex and long-term venture and experience shows that it requires resources and leadership that should not be left to chance. For a partnership to evolve in its effectiveness, it is important to plan for constant progress through regular review and writing things down! This can be achieved by annually reviewing the checklist and updating a 'Forward Framework' comprising an over-arching strategy and two component plans covering the 'how' and the 'what' of town centre revitalisation.

Business Planning: An organisational business plan covering the foundations, form, folk and organisational finances will determine whether there is an effective and sustainable partnership able to deliver improvements. This organisational plan should define the inter-relationship and respective roles of partners such as the local authority, town council, business partners, Chamber of Commerce or a BID.

Action planning: A town centre action plan is necessary to determine and define objectives, projects, responsibilities, budgets, timescales, outcomes and impact measures as the building blocks of the coordinated delivery of improvements on the ground. The annual review of such an action plan should begin and end with a review of available evidence and the monitoring of impacts and changes.

THEME 1: Planning and travel to boost foot-flow

This theme could plan for a balanced business mix and boosting footfall through improved access including investment in sustainable travel. It covers:

- Planning & property

- Parking, travel & access

THEME 2: Streetscape, culture and heritage to increase participation

This theme could focus on sustaining the quality and appeal of the streetscape and public realm alongside engaging the community in understanding the Garden City heritage. It covers:

- Streetscape & public realm
- Culture and heritage participation

THEME 3: Business support, promotion and digital to boost appeal

A third potential theme could include support for 'softer' business development and diversification, promotion based around its distinctive heritage, and development of its digital footprint. It covers:

- Place branding & marketing
- Business support
- Digital technology & data

THEME 4: Partnership development driven by effective communication and coordination

An overarching fourth theme focuses on delivery through partnership development between key stakeholders. It covers:

- Communications & engagement
- Coordination & monitoring

Next steps

This report is a detailed piece of work that necessarily pulls together existing policies/proposals and a stakeholder perspective of issues in a systematic way. Its aim is to provide an action-orientated approach that can be delivered by a coming together of key local partners and a realistic appraisal of priorities and resourcing needs.

This draft report concludes with a series of suggested next steps that partners will need to consider and undertake in the process of developing and delivering a robust partnership and action plan able to aid the town centre's recovery and revitalisation.

Introduction: Revitalising Town Centres

This work uses a tried and tested methodology developed by the People & Places Partnership as a basis for preparing a COVID-19 Recovery Strategy for Letchworth Garden City town centre on behalf of North Hertfordshire Council.

North Hertfordshire Councils' requirements

This report follows the methodology designed by the People & Places Partnership for preparing Town Centre Recovery and Development Plans for the North Herts towns of Hitchin, Baldock, Royston and Letchworth Garden City. The same methodology is used for each of the four towns to identify their unique character and issues faced, whilst enabling comparisons to be made and complementary plans prepared.

As a part of the North Herts Welcome Back Fund programme, the Council wished to work with key stakeholders in each town to map out: a high level strategic and effective COVID recovery plan for its town centres in the short-term; a medium- and longer-term development strategy framework to assist the town centres develop successfully over the next decade.

As part of the council's emerging Local Plan, Policy SP4 Town Centres, Local Centres and Community Shops make references to reviewing each of its town centre strategies. This commission will help inform the scope of work associated with review of the town centre strategies.

People & Places' approach

The People & Places Partnership offers a proven track-record of *bringing facts and faces to centres* through an evidenced-based, collaborative working method for enabling the revitalisation of town and city centres. People & Places have extensive experience of conducting research into town centre performance and perceptions; businesses confidence; stakeholder engagement; partnership development; town centre action planning and delivery; and performance monitoring.

In 2020, People & Places updated its earlier national *revitalising town centres toolkit*, prepared for the Local Government Association LGA). The toolkit provides local leaders with guidance on how to approach the revitalisation of town and city centres.

The methodology used by People & Places to develop the Letchworth Town Centre Recovery & Development Plan will adopt and adapt the approach created nationally as good practice in the LGA toolkit. In-line with the requirements of North Hertfordshire Council, this methodology focuses on helping local authorities and their partners to develop a 'Forward Framework' that focus on both the 'what' and the 'how' of town centre revitalisation.

The methodology used here to prepare the Recovery and Development Plan has six key elements reflecting the requirements in the strategy brief blended with People & Places' tried and tested approach used in the LGA toolkit. The approach has been used to prepare plans for the other three North Hertfordshire towns.

The People and Places Partnership are creators of the Local Government Association's national revitalising town centres toolkit. This online toolkit provides practical guidance and resources to assist councils in taking a strategic and evidence-based approach to revitalising town centres. The updated version prepared by People & Places in summer 2020, includes newly available case studies and guidance to help local authorities and place partnerships to develop COVID-19 recovery planning as part of wider revitalisation.

The toolkit uses the town centre checklist developed by the People & Places Partnership for delivering the 'how' and the 'what' of town centre revitalisation. Councils can use the self-assessment 'town centre checklist' with partners, to regularly review progress in developing local policy and practice.

Key elements to consider in applying the town centre checklist are:

- Foundations: the process should be underpinned by an up-to-date review of existing strategies, collective objectives and evidence from recent surveys.
- Function: action planning begins with a clear statement of identified issues; recognition of council and partners' roles; creation of suitable responses; acknowledgment of gaps in delivery; identification of impact measures.
- Form and Folk: next comes the development of appropriate organisational 'form' to coordinate activity including defining the roles of key partners and wider stakeholder engagement through 'folk'.
- Finances: financial planning needs to include identifying opportunities for fund raising, inward investment and partnership sustainability.
- Forward planning: finally, everything gets written down as a 'forward framework' and regularly reviewed.

The updated toolkit uses guidance on responding to the COVID-19 pandemic based on an adaptation of the Institute of Place Management's (IPM) national post-COVID 19 Recovery Framework. The IPM's Post-COVID 19 Recovery Framework has much in common with the toolkit's approach. Essentially both frameworks place a strong emphasis on evidence-based planning and delivery whilst focusing on shaping the 'how' (partnership development) and 'what' (action planning & delivery) of recovery/revitalisation. Both frameworks recognise the key roles of local coordination and communication in delivering successful town and city centre outcomes.

1. **Review of how prepared each town centre's economies are to recover from the Covid pandemic**

An understanding of the evidence-base about the preparedness of each town centre's economic and associated social functions will be achieved through the following sequence of research.

- A desktop review will be undertaken of existing district-wide and town specific strategies to understand existing data, identified issues, related policies and existing/proposed interventions.
- Interviews/discussion with key stakeholder groups locally and leading councillors/officers within the local authorities and agencies such as the LEP will focus on achieving buy-in to the process; gauging perceptions/evidence of town centre priorities; and beginning to consider the potential future roles of different organisations/departments.

2. **Clearly articulated recommendations of what needs to be done to strengthen each town centres' recovery as a high-level action plan with immediate and short-term actions**

Undertaking Town Centre Baseline Survey: To help objectively understand the wider economic, social and environmental issues and opportunities facing each town centre, People & Places will adapt its national town centre baseline survey process that forms part of the LGA toolkit. This survey work will comprise:

- Town centre business use survey, analysed against national benchmarks of business mix
- Business confidence survey: An online 'business confidence survey' will be made available to every customer facing, town centre business using social media accounts and email contacts of local partners. own centre users' survey:
- Customers' survey: An online town centre users' survey will be distributed through Council and partners social media accounts to gauge the perceptions and priorities of different types of town centre customers.
- Digital development opportunities: As an adjunct to the business confidence and town centre users' survey, preliminary questions will be asked about each town's digital infrastructure services.

Town Centre Forward Framework: People & Places will use the findings from step (i) and analysis of the baseline survey to prepare an evidence-led 'forward framework' template with a clear set of objectives for the Town Centre to aspire to address identified issues over the next 5 years and beyond. This forward framework will include existing/proposed interventions and recognise gaps in the responses matched with proposals for practical suggestions for ensuring how each town's daytime and nighttime economies and community facilities could act in concert to maximise the draw of the town centre.

A draft Forward Framework template will form the basis for reasoned discussion of which agencies, stakeholders and other interested parties are best placed to lead on which actions recognising resource implications. Time is

LGA Revitalising Town Centres Checklist

FOUNDATION	
Evidence and objectives	Has a baseline survey of issues been completed including COVID-19 impacts, objectives defined and short/long-term outcome monitoring 'dashboard' agreed?
FUNCTION	
Travel, parking and access	Is an integrated town centre travel, parking and access strategy in place with immediate social distancing measures and transition to increased sustainability?
Planning and property	Are town-centre-first policies, master-planning or asset management in place that take account of COVID-19 impacts and engage businesses and landlords?
Streetscape and public realm	Has a prioritised streetscape and public realm improvement plan been agreed that facilitates social distancing and increases long-term, cross-town foot-flow?
Business support	Is there tailored mentoring and support to enhance the quality, performance and distinctiveness of businesses based on recovery needs and future trends?
Place branding and marketing	Is there a clear understanding of the town brand with pooled resources and a creative, collective campaign offering reassurance to existing and new markets?
Digital tech and data	Is there an assessment of digital infrastructure and skills with an investment plan for the collective use of data in marketing and monitoring the town centre?
FORM	
Governance and influence	Is there an appropriate structure, membership and credibility to coordinate local stakeholder activity and influence cross-departmental or strategic partnerships?
FOLK	
Community engagement and coordination	Is there strong public, private and community engagement with active and coordinated involvement in planning and delivery that extends to community assets development and is backed by a clear communications plan?
Capacity mapping and team building	Are there an effective chair, suitably skilled board, employment of necessary staff, effective management of trained volunteers and established relationships for joint working with other stakeholder groups?
FUNDING	
Finances and investment	Is there an organisation with robust financial procedures and strategy agreed for diverse and sustainable fund raising and income to support a town centre? Is it 'run as a business' with inter-relationships understood and investment secured?
FORWARD PLANNING	
Strategy and plans	Is there a well-defined 'forward framework' comprising an overarching vision/strategy, a rolling organisational business plan and a parallel action plan coordinating and monitoring delivery on the ground?

3. **Recommendations on strategic priorities for the medium and longer-term development of each town.**

Based on an understanding of the wider economic, social and environmental aspects, gained following the earlier research and reasoned discussion with key stakeholders, People & Places will respond to issues identified and gaps in current provision/capacity, to outline medium- and longer-term ideas for each of the town centres, recommending how these can be drawn together to form a coherent framework and outline strategy of a wider development plan.

A revised Forward Framework will be presented as a finalised Town Centre Recovery and Development Plan for each town centre. This will be a tabulated document that clearly shows the links between issues identified; short, medium and longer-term actions /recommendations; and outcomes monitoring metrics to measure success.

4. **Identification of funding streams currently or potentially available to support the recovery action plan and the longer- term development plan**

As well as identifying existing and potential sources of funding in the tabulated Recovery and Development Plan, People & Places will use its national-level knowledge and experience to help prepare a compendium of currently or potentially available funding to support delivery. This will clearly identify the various funding routes in relation to the identified actions/recommendation

Similarly, People & Places will use its experience with towns elsewhere and at a national to identify best practice in how similar towns to those in North Herts are utilising existing funding and/or securing new monies to support recovery of both daytime and nighttime economies. This will include suggestions regarding how each town centre can position itself to maximise leverage of inward investment, grant funding and other funds.

5. **Recommending effective partnership and/or governance arrangements for improving, promoting and maintaining the overall 'wellbeing' of each town centre**

The draft Forward Framework and finalised recovery plan will also focus on the 'how' of town centre recovery and revitalisation by recognising the roles of individual organisations and suggesting suitable governance arrangements to address identified themes in a coordinated and clearly communicated way. Importantly, People & Places will build such engagement with partners into recovery planning process from the outset.

The roles of partner organisations in planning, delivery and governance will be recognised in the published plans in a way that fosters involvement in progressing the short to medium term recovery plan and the wider medium to longer term development plan.

6. **Pointers to relevant best practice nationally with regard to the recovery of towns akin to those in North Herts**

People & Places will draw-on its national work including as authors of case studies on COVID-recovery for the LGA's town centre toolkit to support the proposed actions and recommendations with reference to best practice elsewhere in recovery of market towns akin to those in North Herts.

Review: Existing Strategies

Summary of findings by issue

This section of the study reviews existing knowledge, consultations and policies relating to Letchworth Garden City's town centre. This review supplements the survey work undertaken by assessing and analysing existing local reports and strategies.

The purpose of this review is to help understand stakeholder perspectives and inform analysis. In doing so, this review helps bring together knowledge and understanding derived from organisations and groups with a particular focus on the future development of Letchworth's' Town centre. Such a review helps in understanding the complementary approaches and inter-linked strategies. These existing strategies and plans are summarised here as background using the town centre checklist structure developed by People & Places in the revitalising town centres toolkit prepared nationally for the LGA.

Planning and property

North Hertfordshire Local Plan 2011-2031

Key Challenges, Issues and Opportunities for North Hertfordshire

The North Hertfordshire Local Plan published in 2011 with subsequent modifications in 2018 and 2021, sets out a strategic vision and spatial strategy for the district over the period 2011 to 2031. Among key issues highlighted, the Local Plan stresses that there is a need to ensure that the District's town centres improve in their flexibility to address changing shopping patterns and retain a vibrant and viable retail environment supporting local communities.

Spatial Strategy and Spatial Vision

The spatial strategy sets out the District Council's overall approach for sustainable development and growth and how this will be distributed across the district. The vision is a statement of what North Hertfordshire will be like in 2031. The focus of the vision is predominantly on housing, the contribution to the sustainable communities, protection and enhancement of natural and historic resource, with appropriately allocated new developments to achieve vitality of key towns.

Specifically in relation to the District's four town centres, the vision seeks to ensure that "*the vitality and viability of the towns of Hitchin, Letchworth Garden City, Royston and Baldock are safeguarded in a way that takes account of their distinctive role. This will have been achieved through carefully planned development which meets the needs of these centres, retaining their market share in terms of their retail offer, whilst recognising the importance of preserving and enhancing their historic character*".

The strategic objectives provide the link between the vision for the district and the strategic policies set out in the Local Plan. Objectives cover three topics that are summarised below in relation to town centres:

- *Environmental*: Existing settlement patterns should be maintained and there is need to enhance the historic character and cultural assets of North Hertfordshire's towns by promoting good design and creating a distinctive sense of place. The effects of climate change should be mitigated through encouragement of sustainable construction techniques and protecting existing and enhancing new environmental assets.

- *Economic*: The local economy should be supported to ensure that it is vibrant, diverse and competitive providing a sufficient range of jobs to support new and existing business. It is crucial to ensure an adequate supply of premises and provide opportunities for a greater mix of skilled jobs through skills training. The retail roles of town centres should be strengthened to ensure their competitiveness and viability relative to the modern-day trends. Additional activity can be achieved through tourism and improved infrastructure, services and facilities.
- *Social*: Adequate housing of different types should be provided to ensure needs of increasing and aging residents while building safe and vibrant mixed communities.

Economy and Town Centres

Retail and services

The Local Plan seeks to promote, protect and enhance the provision of shops, financial and professional services, café or restaurants, pubs or drinking establishments or takeaways in the main centres of Hitchin, Letchworth Garden City, Baldock and Royston. The Council aspires to reduce the need for unnecessary travel to alternative centres and ensure that the proportion of expenditure going outside the District does not increase.

A Town Centre and Retail Study established the need for additional 38,100 gross m^2 of retail, commercial and leisure floorspace in the District over the period to 2031. This included 22,500 m^2 of comparison goods, 8,600 gross m^2 convenience and 7,000 m^2 of other uses including food and beverage outlets. The projected numbers included the potential of taking-up currently vacant units.

The Council aims to ensure that the town centres maintain their primary retail function whilst increasing their diversity with a range of complementary uses, promoting competitive and flexible town centre environments. It is proposed that this be achieved by monitoring and the strategic allocation of retail and service active primary frontages, avoiding appearance of non-retail uses that can create 'dead frontages'. Units allocated for primary frontages, will majorly be permitted only for retail use. Those units marked as having secondary frontages will be permitted for other A class uses based on their contribution to vitality and viability.

Other uses

The Local Plan recognises that "*business uses within town centres can add to the vitality and viability of centres. Office workers within a town centre will create more custom for shops and services.*" The Local Plan consequently outlines that the Council will proactively encourage sustainable economic growth, support new and existing businesses and seek to build on the District's strengths, location and offer. This includes supporting office, research and development, light industrial and B-class uses in appropriate locations, including offices in main town centres. Office development will also be encouraged above ground floor retail.

Town centre policy

Policy SP4 sets-out the following specific policies for protecting the vitality and viability of the District's town and local centres, including preparing town centre strategies.

a. Promote, protect and enhance the their retail and service functions following a retail hierarchy that identifies the town centres of Hitchin, Letchworth Garden City, Baldock and Royston; followed by 13 existing local centres.

b. Support proposals for main town centre uses in where they are appropriate to the size, scale, function, catchment area, historic and architectural character of the centre.

c. Identify Primary Shopping Frontages within town centres where A1 retail uses will be expected to concentrate.

d. Make provision for 38,100 m^2 of additional A-class floorspace.

e. Maintain up-to-date town centre strategies to support this approach and / or adapt to change.

Letchworth Garden City

The Local Plan recognises that Baldock, Hitchin and Letchworth Garden City have significant overlapping markets, with spend leakage from Letchworth Garden City to Hitchin and a lack of physical space at Baldock to accommodate its projected retail capacity. The Plan acknowledges that Letchworth Garden City has a higher physical capacity to accommodate new businesses over the plan period, and it is therefore marked as capable to provide physical space and recapture its leakage.

Housing – there were twelve sites are allocated within Letchworth's' administrative area with an estimated 1,485 additional dwellings to be built over the plan period. None of the developments are located within the town centre itself though of course of the potential to increase the town's customer base. It is important that new housing development can increase opportunities for existing and new residents to access non-car modes of transport to travel to the town centre.

Economy – Letchworth Garden City is identified as an important employment area, where in addition to other employment hubs, the town centre provides a range of shops and employment opportunities. The town centre was identified as capable of serving the growth and capacity needs of the wider District needs, with opportunities allocated as follows: The Wynd; Gernon Road; Arena Parade.

North Hertfordshire Retail Study Update (2016)

The North Hertfordshire Retail Study Update prepared by Lichfield and Partners in 2016 outlined business growth needs for retail and leisure business specifics to maintain the competitiveness of districts larger towns. The retail study informed the Local Plan targets for A1 growth.

The Retail Study identified Letchworth as the second on the retail profitability table when compared to Royston, Hitchin and Baldock, as well as the second comparison shopping destination within the District. Letchworth was also identified as the second, after Hitchin, for food and beverage floorspace provision.

The Retail Study suggested that a third of required additional floorspace in Letchworth should be delivered through the reoccupation of vacant shop units. In addition to that, three potential development sites are pointed out: The Wynd, Arena Parade and the junction of Gernon Road/Broadway.

The study also assessed the potential for commercial leisure and other town centre uses with a focus on family leisure activities such as cinemas, tenpin bowling, bingo, theatres, nightclubs, private health/fitness suites and catering, pubs and bars. Based on the survey responses, Letchworth appeared as a primary location for potential cinema and fitness centres.

North Herts Council Climate Change Strategy 2021-2026

The North Herts Climate Change Strategy outlines the Council's commitment to contributing to the reduction of carbon emission and provides a foundation for ameliorating the impacts across service areas. While not outlining town centre related policies in particular, the Strategy is considered in any activities managed by the Council, including new developments and their energy efficiency; green infrastructure and green spaces contributing to biodiversity.

The Wynd Masterplan & Letchworth Town Centre Implementation Plan (2011)

The Wynd Masterplan and Letchworth Town Centre Implementation Plan was prepared on behalf of the Letchworth Garden City Foundation. The Town Centre Implementation Plan highlighted key sites across the town, set strategic objectives and provided an overarching strategy for the development of Letchworth Garden City. The Wynd plan, focused on the Wynd area and presented a detailed masterplan for the site including land use and strategies for public realm, movements and flows.

The Letchworth Town Centre Implementation Plan provided detailed analysis of the town centre's physical environment and function, though despite its name is vague in terms of specific recommendations. It nevertheless provides detailed analysis that can still form a basis for current town centre development planning.

Garden City goals

In terms of planning and property, the Plan included a valuable restatement of the Garden City's original goals and the current condition in relation to these.

1. *Building goals*: Use of locally sourced materials; innovative methods of construction.

The current condition: Decline in innovative building design to standard types; Centenary competition for "modern cheap cottages".

2. *Energy goals*: A self-sufficient town with localised power generation.

The current condition: Nationalisation of electricity to the national grid.

3. *Green infrastructure goals*: Importance of access to the countryside; role of spaces and parks in towns; contact with nature and resultant 'natural healthfulness'.

The current condition: Established parks and spaces in the town; underutilised spaces; Greenway is a popular resource.

In response to consultation, community sentiments supported a plan that highlighted how the Garden City identity of Letchworth needs to be reinforced by introducing more greenery and strengthening the original architectural style. Enhancement of the identity of the town to create and its unique role, should be pursued instead of focusing on its competition with Hitchin and other nearby towns.

Overarching approach:

The overall approach proposed in the Letchworth Town Centre Implementation Plan was to look to Letchworth's current strengths and further enhance these. It is an approach that still seems valid over a decade later. It was proposed that Letchworth has a number of key assets that provide unique appeal and could be capitalised on to strengthen the town's identity. These include:

- *First Garden City*: Letchworth's status as the first Garden City in the world, with potential to establish the town as a centre for debate on the future of towns, including an international festival of talks, films and events.
- *Environment*: The town's attractive physical environment and green spaces, which provide a pleasant environment in which to live and visit and can support the important leisure and cultural uses that now represent a key role for town centres in the UK.
- *Independent businesses*: Letchworth's niche, independent shops, which already have a high local profile and draw people from beyond the town. This can include establishing Letchworth as a recognised centre for unusual destination shops, whilst continuing to meet local needs.

Broad planning and property options set-out in the Implementation Plan for delivering this overall approach included:

Building styles and character

- explore opportunities for a shop front improvement scheme in the town centre
- introduce contemporary architecture, which complements and enhances the historic built environment
- consider the potential for Letchworth to pioneer sustainable architecture
- consider the potential for a new cultural quarter to be developed at The Old Town Hall/Arena car park site

Shops and services

- establish a clear pedestrian circuit in the town with retail anchors
- strengthen Letchworth's identity for specialist, independent shops
- establish a 'hit list' of national retailers for Letchworth
- develop a 'meanwhile' uses strategy for Letchworth
- further develop Letchworth's programme of events and activities

Letchworth Garden City Town Centre Strategy (2007)

Letchworth Garden City Town Centre Strategy is a supplementary planning document that pre-dated and was used to inform the Local Plan. It set out the vision, aims, objectives and planning strategy for the town centre including opportunity sites.

Parking, travel and access

The North Herts Local Plan identified need for improvement across transport links connecting east to west. While offering strong connections to London through road and rail links, a lack of direct routes across the District puts pressures on rural roads.

The Letchworth Town Centre Implementation Plan included the following proposals for improving transport, movement and parking in the town centre:

- review elements of the one-way traffic system in the town centre
- explore the potential to establish cycle networks connecting the town centre to the Greenway
- consider a cycle hire scheme to promote visits to the Garden City
- improve the role of the rail station as a transport hub
- assess potential for additional station car parking on the north side of the rail tracks
- improve the quality and use levels of the multi-storey car park
- consider the potential for establishing Letchworth as an electric car hub
- improve pedestrian signage throughout the town

The Implementation Plan recognised that Letchworth is relatively well served by car parks, with an oversupply of spaces, however these are not often of high quality. Key issues related to car parking in the town centre at the time included:

- conflict between commuter parking and town centre parking near the train station
- poor quality provision at the Wynd, the old Town Hall surface car parks and the Garden Square multi-storey car park
- a conflict between pedestrians and vehicles using on-street parking bays throughout the centre.

Letchworth Sustainable Travel Town Plan

The Sustainable Travel Town Plan forms part of Hertfordshire County Council's Local Transport Plan, and aims to increase the number of people walking, cycling and using public transport in the town. The Plan sets programme objectives and outlines targets for schemes covering behaviour change; walking; cycling; train improvements; bus improvements; park and ride.

Parking: The plan also notes that the shift towards the sustainable travel will be supported by District Councils Parking Strategy that is working to encourage a modal shift towards more active and sustainable travel through. This will be coordinated with the Heritage Foundation, the Letchworth BID, Hertfordshire County Council, bus and rail operators to enable a smooth transition.

Cycling measures: The Plan points out that the Council fully supports the re-allocation of road space to introduce measures such as bus and cycle lanes across Letchworth where appropriate and considering historic character of some of the roads.

Bus priority measures: The Sustainable Travel Town Plan will also be supporting improvement of public bus facilities, ensuring that these are more attractive, convenient and direct, therefore enhancing shift in use from private to public transport.

As part of development plans for new housing, the Letchworth Garden City Heritage Foundation has developed a series of transport plans including proposals for the encouragement of active and public transport. This has included the preparation of a Cycling Strategy that proposes potential schemes to improve conditions for cycling in Letchworth to deliver the following objectives:

- enhance and extend cycle routes to create a comprehensive network, making cycling an easy, pleasant choice.
- make it easier and safer for all to cycle in and through residential areas.
- improve access by bicycle to key destinations in Letchworth including the town centre, the station and the leisure centre.
- give people the confidence and skills to cycle and encourage positive and safe interactions with other road users.

These transport plan also indicates how the developments could help support improved bus provision through coordination with town centre strategies and / or adding services that are more regular and usable for existing and new residents; particularly reducing the number of people who have to drive to the rail station or town centre for work.

Streetscape and public realm

The Wynd Masterplan and Letchworth Town Centre Implementation Plan contains detailed urban design analysis. Much of this analysis could form the basis for an updated review. It covered: town-wide movement; location of community services; sustainable transport; public realm; legibility; frontages; public realm quality; land use; car parking; retail composition; building use; town evolution.

Key aspects of this urban design analysis in relation to streetscape and public realm are:

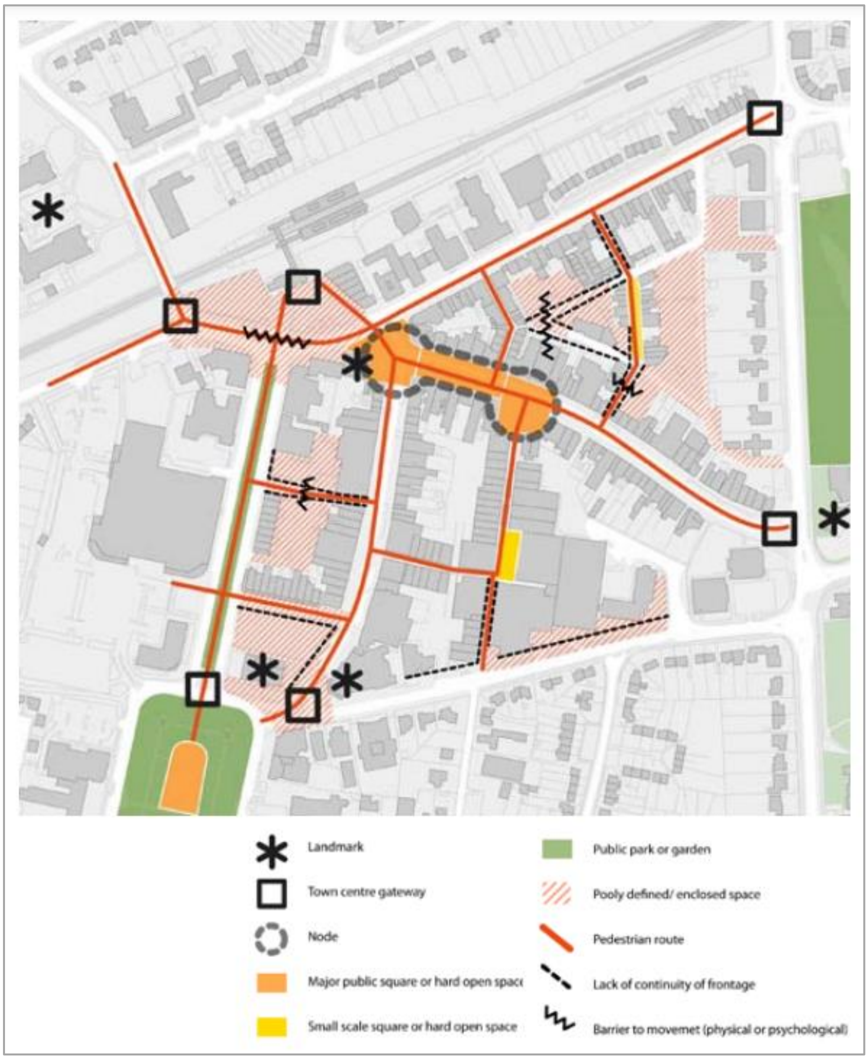
Public realm: there is an appreciation of recently accomplished improvements to the public realm within the town centre with the focus on pedestrian environment, paving, planting and landscaping.

The plan highlights six gateways where improvements could be concentrated to enhance the first impressions of the centre. The area around the train station was identified as a key opportunity for enhancement, as the predominance of taxi parking and overgrown vegetation.

Frontage: Analysis confirmed that most of Letchworth town centre benefits from high levels of active frontage, as the majority of the ground floor in the town centre is in use for shops or other businesses. However, a number of spaces were defined by inactive frontage and therefore are less welcoming environments.

Some of the frontage within the Garden Square Shopping Centre, The Arena and on the approach to the Wynd were identified of poorer quality, and less sympathetic to the character of Letchworth, and this detracts from the town centre appearance.

Legibility: The legibility of an area relates to how easy it is to navigate and the psychological impression. Some of the components of a town which contribute to its legibility include landmarks, gateways, public spaces, nodes of activity and general environmental quality. As the plan shows, there are several poorly defined spaces in the core of the town centre which can leave a negative impression.



The Letchworth Town Centre Implementation Plan also included broad recommendations for enhancing the town centre green spaces and public realm including:

- re-landscape and improve visual links to and from Station Approach
- improve connections to Broadway Gardens
- re-landscape Broadway Gardens
- connect the Wynd more effectively to Howard Park

The Letchworth BID Business Plan contains a broad objective and proposed detailed activities and impact measures relating to enhancing the towns streetscape and accessibility.

Welcoming, attractive and accessible: To provide a welcoming, attractive and easily accessible environment for visitors, workers and residents to explore and enjoy. Proposed BID activities are:

- work with others to maintain and enhance the usability, appearance and vibrancy of the streets and open spaces.

- work closely with the council and other car park operators to improve parking availability, signage, access, payment structures and the overall experience across Letchworth for both visitors and those who work in the town.
- work with others to address signage to encourage people to explore and make more use of the town and all it has to offer.
- work with others to develop a diverse evening and night time leisure offer which appeals to people from all ages and backgrounds, in a safe, clean and attractive environment.
- working with others to address anti-social behaviour and crime issues which impact upon the visitor experience and affect businesses in certain areas.

Culture and Heritage

Letchworth Garden City Heritage Foundation Letchworth Garden City Heritage Foundation Strategic Plan (2021)

The Heritage Foundation's revised Strategic Plan articulates wider community ambitions for the Garden City alongside the work of North Herts Council, Hertfordshire County Council and other key partners. The Strategic Plan focuses on improving life chances, making Letchworth a great place to live and driving investment in the town, with a new a fourth objective of initiating a financial recovery roadmap in response to COVID-19s impact. These are the four objectives with proposed actions relevant to town centre recovery and revitalisation as a focus for the wider community:

Improve life chances for people in Letchworth

- continue to address poverty and inclusion through our Families and Young Peoples Project
- adapt our grants programme to support emerging areas of need, including financial and digital inclusion, and continue to provide grant funding to organisations impacted by COVID-19
- pilot a neighbourhood social action project
- commission projects and activities to help reduce poverty and hardship
- support young unemployed people by taking part in the government's Kickstart scheme.

Ensure Letchworth continues to be a great place to live

- launch a Great Outdoors campaign to encourage people to use the Garden City Greenway and other green open spaces in Letchworth
- create a cultural learning programme for schools using the story of the Garden City to engage children in the story of their hometown and build civic pride
- showcase local talent through the Letchworth Culture Project

- improve our online Heritage Advice Service to make it easier for homeowners to apply to make improvements to their properties

Increase investment in Letchworth

- launch our new fundraising strategy to support the future of our arts, culture and heritage venues and community programmes
- take a leadership role to advocate for investment in Letchworth to address the needs in our town
- work with Cranfield University to research and map Letchworth's economic future including local areas of bioscience and digital
- work with our partners to explore whether Letchworth can become a 'smart town'
- respond to the outcome of the Local Plan

Heritage Foundation Letchworth's Culture Strategy to 2026

Letchworth's Culture Strategy published by Letchworth Garden City Heritage Foundation, places culture at the heart of the town's strategy to deliver sustainable, people focused improvements for the community, visitors and the creative businesses.

The Culture Strategy's vision is that by 2026, "*Letchworth will be a thriving arts, culture and heritage centre, attracting audiences from around the country and the world, providing opportunities for all to engage and achieving high levels of cultural participation for our residents.*"

The strategy's first of three 'promises' is closely related to branding and promotion to increase visits to the town through strengthening the town's cultural identity and quality of provision.

The Place: Through our arts, culture and heritage programme, we will make Letchworth a place that people want to visit and that our residents are proud to call home. Specific objectives and measures of success that sit under this are:

- create a co-located Culture Centre enabling delivery of a range of programmes and ensuring that Letchworth's cultural offer is an emblem of, and a focal point for, the town as a place to visit and a source of pride for local residents.
- ensure Letchworth is known for its high-quality cultural offer, attracting arts and heritage consumers and professionals, and enabling it to grow its national and international profile.
- deliver cultural activities and share the story of the garden city in our neighbourhoods and open spaces, increasing accessibility for all.
- ensure that the town centre has cultural services and activities woven throughout, enhancing its vibrancy and increasing footfall.
- work with schools to support the curriculum requirements relating to "cultural capital" and increase young people's engagement with the arts and the Letchworth Garden City (LGC) story.

The Cultural Strategy's second promise highlights the importance of targeted engagement with identified audiences in a way that provides in-depth promotion of the town's cultural offer. Increased engagement of residents, including young people, is intended to be achieved through inclusive access to the cultural offer and learning opportunities.

The Public: We will create events, activities and services that engage our target audiences. Specific objectives and measures are:

- create an audience development plan that increases the partnership's understanding of key target audiences and considers ways in which to engage and involve them. Address barriers to access, enabling all to enjoy the town's cultural offer.
- ensure that our audience profile is inclusive and representative of our community profile.
- enable all children, young people and families to learn about the history of the town and engage with a wide range of cultural opportunities.

The Cultural Strategy third promise seeks to enable its delivery through supporting existing cultural service practitioners, growing local talent and encouraging new providers to fill in the gaps acknowledged through consultation.

The Practitioners: We will help the town's cultural practitioners to develop their skills and practices and identify and secure opportunities to advance their careers and grow their businesses. This will include bringing talent into the town to enhance our offer with shared skills experience. Related objectives and measures are:

- create a physical and digital communications platform for local practitioners to share skills, promote activities/events and showcase all that Letchworth has to offer.
- ensure that our practitioners' profile is inclusive and representative of our community profile, and that these individuals/groups are given opportunities to deliver their works.
- support skills development within the cultural sector and the creation of jobs and volunteering opportunities within the town, and establish more workspaces for creatives.

Business Support

The Local Plan vision for North Hertfordshire aims to build robust and prosperous economy with a greater mix of skilled jobs, focused in locations that best support the District's growing population, with a particular emphasis on support for small local businesses.

Letchworth BID Proposal & Business Plan 2019-2024

The Letchworth Business Improvement District (BID) works to support businesses in improving the trading environment and promotion of the town. Letchworth BID is a not-for-profit company set-up by local businesses and organisations.

Letchworth BID's draft Business Plan presented a very broad vision which the BID seeks to help achieve for the town through its business-led programme of investment:

- a 21st century Garden City which is connected and engaged with its residential and business community

- a vibrant 'Go to' place with a sense of common purpose which is attractive and appealing for everyone who lives, works, visits and does business in Letchworth
- a place which is lively, has a strong sense of identity and awareness and is recognised internationally.

The Letchworth BID web site summarises its workstream as four types of activities aimed at improving the trading environment for businesses and therefore contributing to delivering the ambitious vision:

- *Events and promotional activities*: Weekly events and promotional activities are held throughout the town centre, showcasing the town's core offer, and bringing additional attractions to the town.
- *Access and parking*: Reviewing and taking action on those aspects of access and parking in the town centre that are most important to visitors and businesses.
- *Marketing*: Promoting what Letchworth Garden City has to offer our primary and secondary catchments via all media formats with an increasing focus on digital media.
- *Developing our offer*: Improving our range, relevance, and quality of social, leisure, service, and retail offer in Letchworth Garden City town centre, working with landlords where necessary.

The BIDs' Business plan contains more details of proposed activities and impacts monitors against three objectives including one specifically identifying is role in bringing businesses together. The other two objectives covering accessibility and promotion are covered under the relevant sections of this strategy review.

Businesses working together: To represent the collective voice of businesses in the town centre to ensure that it continues to develop into a great place to do business and meets the needs of those who live, work, visit and do business in Letchworth. Associated BID activities are:

- work with others to develop a town centre offer which reflects the current and future needs of the Letchworth residential and business community.
- implement effective communications between businesses and the BID to promote awareness of different issues which may affect trading conditions or opportunities for their benefit.
- work with landlords, agents and others to ensure that vacant or derelict properties are maintained and presented in a smart and tidy appearance.
- influence, support and encourage plans and proposals for new buildings, signage, building refurbishments and public realm developments which build upon the town centre's strengths.
- encourage an increase in trading between businesses in Letchworth and between businesses and those who work in Letchworth.
- work with businesses to identify opportunities and implement initiatives which will contribute towards the reduction of business overheads.

- work with other organisations to monitor footfall, commercial performance, parking statistics, customer perceptions and other key measures across the Letchworth BID area and provide updates for businesses.

The draft of Letchworth's Culture Strategy published by Letchworth Garden City Heritage Foundation, seeks specifically to support the town's cultural practitioners to develop their skills and secure opportunities to grow their businesses.

Strategy for Clean Growth in Hertfordshire

Hertfordshire LEP has recently launched its Strategy for Clean Growth in Hertfordshire. It will be important for new and existing business in Letchworth to be aware of the opportunities it presents to support their growth and transformation as well as more widely to see if it can be a focus for investment in the Garden City.

The Strategy seeks to help facilitate clean growth through two 'pillars' of support with specific activities tailored to each of these:

Developing the green economy through the growth of the Low Carbon Environmental Goods and Services (LCEGS) sector

- understanding the scale of the LCEGS sector in Hertfordshire and taking opportunities to grow it
- developing the skills needed to grow the LCEGS sector in Hertfordshire
- building networks and supply chains within the LCEGS sector
- attracting inward investment in the LCEGS sector

Delivering transformational wider outcomes to which all parts of the economy and all places within Hertfordshire should contribute

- supporting 'green transitions' across all sectors in Hertfordshire
- improving access to the skills needed for cleaner growth across

It will be important for all businesses and sectors in Letchworth to be aware of the necessary steps in their transition. There is an opportunity for local businesses to develop the skills to support this transition across sectors. It might also be possible for Letchworth to build on its environmental heritage to develop a cluster of LCEGS businesses in the local area.

Place branding and marketing

The Letchworth BID Business Plan contains a broad objective and proposed detailed activities and impact measures relating to place branding and marketing.

Lively and well promoted: To create a place which is lively, has a strong sense of identity and awareness. Activities include:

- work with others to define, develop and promote the brand identity of Letchworth town centre which reflects its strengths, characteristics and heritage and is reflected in everything the BID and other partners deliver.

- increase awareness of Letchworth as a destination, its business sectors, its events and all it has to offer by using digital and social media channels, traditional marketing and PR in a way which is consistent with its brand.
- develop promotional campaigns to attract more people and loyalty schemes, to encourage more frequent use of the town centre.
- develop Sundays into a day for a great family experience.
- develop and organise a programme of annual and regular events and activities to create an animated feel to the town centre throughout the year, including the quieter months.
- promote, develop and recognise customer service excellence through award schemes.

There is an opportunity through this work and funding opportunities such as the Shared Prosperity Fund to develop partnerships and secure additional resources to assist in delivering this work.

The BID has recently undertaken its own branding exercise as an organisation including the preparation of a new logo that acknowledges Letchworth's Garden City origins.

North Herts have also commissioned a branding exercise within the District. Letchworth Garden City needs to be identified as a distinctive element within this as well as part of the key axis with Baldock and Hitchin.

Digital technology and data

Social media and digital footprint

There is no specific social media or digital strategy for Letchworth though it is a recognised part Letchworth BID's promotional work to use "digital and social media channels… in a way which is consistent with its brand" and for the Heritage Foundation's Cultural Strategy to "create a physical and digital communications platform for local practitioners".

The following web sites and social media platforms are revealed through a quick online search.

- Visit Herts https://www.visitherts.co.uk/see-and-do/destinations/north-hertfordshire/letchworth-garden-city/
- Discover Letchworth https://www.discover-letchworth.com/about
- Letchworth Garden City Heritage Foundation (https://www.letchworth.com/); on Facebook (https://www.facebook.com/letchworthgardencityhf) on Instagram (@letchworthgardencity)
- Love Letchworth web site (https://loveletchworth.com/about-our-town/) and Instagram (@loveletchwoth)

Whilst each of these sites serves slightly different audiences and organisational roles, it is important to coordinate and clarify the town's digital footprint.

There are also two private, community Facebook pages with a combined total of 8,000 followers and Letchworth Business Group page with 1,800 members.

Town centre Wi-Fi and footfall monitoring

North Herts Council has recently adopted a new mobile phone-based footfall monitoring system for Letchworth as part of a wider scheme with other East and North Herts towns. This system will potentially give very useful baseline data as well as routine updates to understand the changing use of the Letchworth town centre post-pandemic with benchmarking possible with neighbouring towns.

Historic data is available of town centre footfall over recent years and will be good, if possible, to analyse this for trends before, during and emerging from the pandemic including daytime, evening and nighttime patterns.

Evidence: The Survey Process

The System

The People & Places Town Centre Baseline Survey process has been developed to address the real issues of how to understand measure, evaluate and ultimately improve town centres. The approach offers a simple way of capturing data on 10 key performance indicators (KPIs) selected by those involved in town centre management. By having the tools to measure baseline performance in this way, strategic decision-making is improved and future progress can be monitored. By understanding the baseline performance, forward strategies and action planning can be more focused and effective.

The system is divided into two sections: large towns; consisting of those localities with more than 250 units; small towns; consisting of those localities with less than 250 units

Towns, depending on their size, contribute to either the large or small town analysis. Letchworth with 251 units is classed as a large town and will be compared against data for large towns nationally. The analysis provides data on each KPI for the town individually and in a national context for comparison. The national figure, unless otherwise stated are the cumulative averages for all the towns which participated in benchmarking during since 2014.

Key Performance Indicators

Each key performance indicator (KPI) is collected in a standardised manner as highlighted in the table below.

Key Performance Indicator	Methodology
Core Economic Indicators	
The Place: Commercial Units	
KPI 1: Use Class	On-street survey
KPI 2: Comparison/Convenience	On-street survey
KPI 3: Trader Type	On-street survey
KPI 4: Vacancy Rates	On-street survey
The Place: Cross-town Trends	
KPI 5: Footfall & Foot-flow	Footfall monitoring
KPI 6: Car Parking	Data from Parkopedia
The People: Stakeholder Surveys	
KPI 7: Business Confidence Survey	Distributed by email
KPI 8: Town Centre Customers Survey	Online using community social media
KPI 9: Digital Development	Included in business/customer surveys

Key Findings: The Place

KPI 1: Commercial Units; Use Class

It is important to understand the scale and variety of the "commercial offer" throughout the town. A variety of shops and a wide range of services in a town are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of retail and services ensures that the local population and visitors can spend time and money there, keeping the generated wealth within the local economy. Importantly, it provides local employment and helps to retain local spend rather than lose it to nearby towns. The table below provides descriptions of each of the Use Classes.

Analysis & Interpretation of Business Composition

This section of the report has been developed to assist in providing detailed analysis and interpretation of business composition. The presence of key classes of retail and other businesses will be indicative of a town centre's current or potential future role. The graphical business composition dashboard gives a visual representation of the make-up of key sectors.

Findings

For the purposes of this study a much more detailed analysis has been undertaken of second and third-level use class to enable a better understanding of the town's business composition. This is shown in the table below that provides a detailed analysis of the commercial offering in the town centre by sub-use class. The figures are presented as a percentage of the 233 occupied units recorded. The business composition 'dashboard' overleaf also provides a visual 'snapshot' of the make-up of businesses in Letchworth town centre.

Simplified use classes from Summer 2021

The ways the business use of a building is classified was simplified in September 2020. New regulations created a streamlined new use class system, although the terminology was not changed until July 2021.

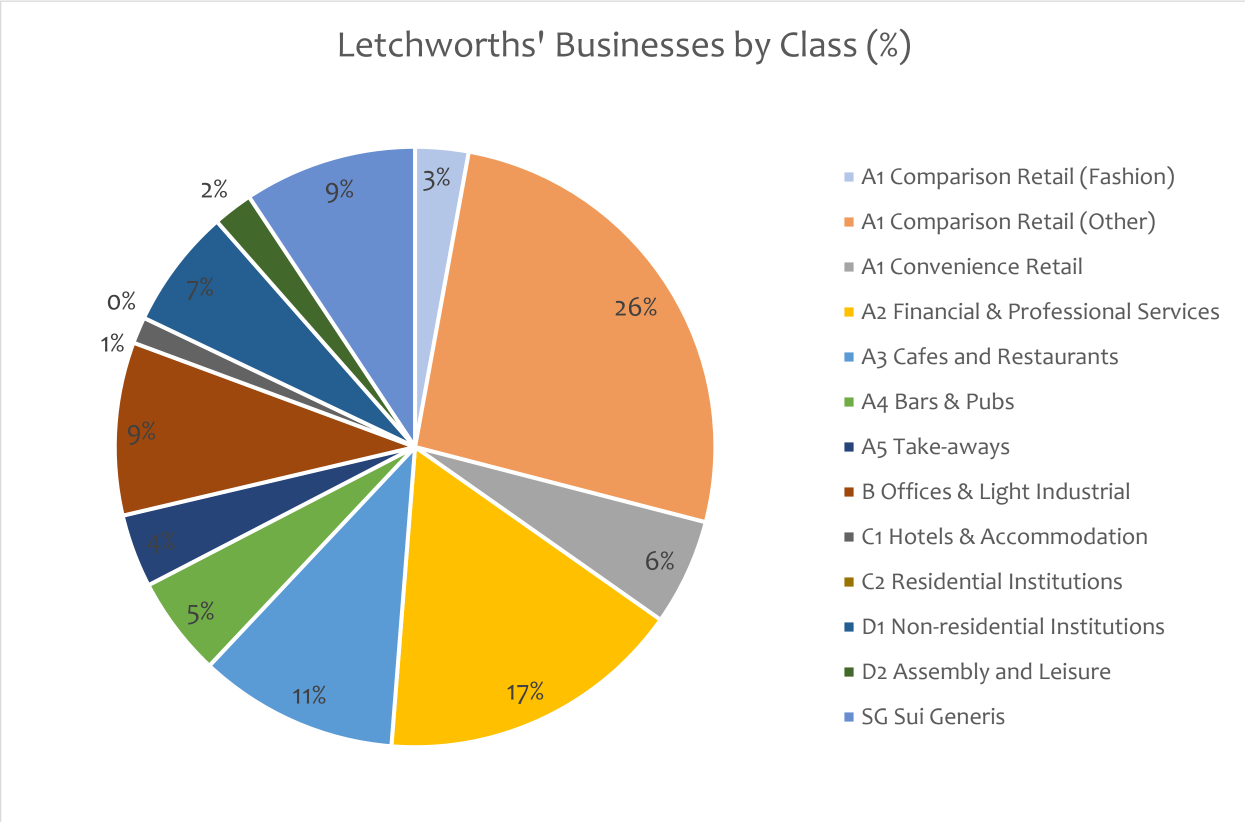
The new use classes are: a broad Class E (commercial, business and service), Class F1 (learning and non-residential institutions) and Class F2 (local community). Shops fall into Class E or Class F2 depending on their use, size and location. This change is important in shaping the potential mix of town centre businesses because it is no longer necessary to obtain planning permission for some changes between various non-residential uses required under the previous use classes.

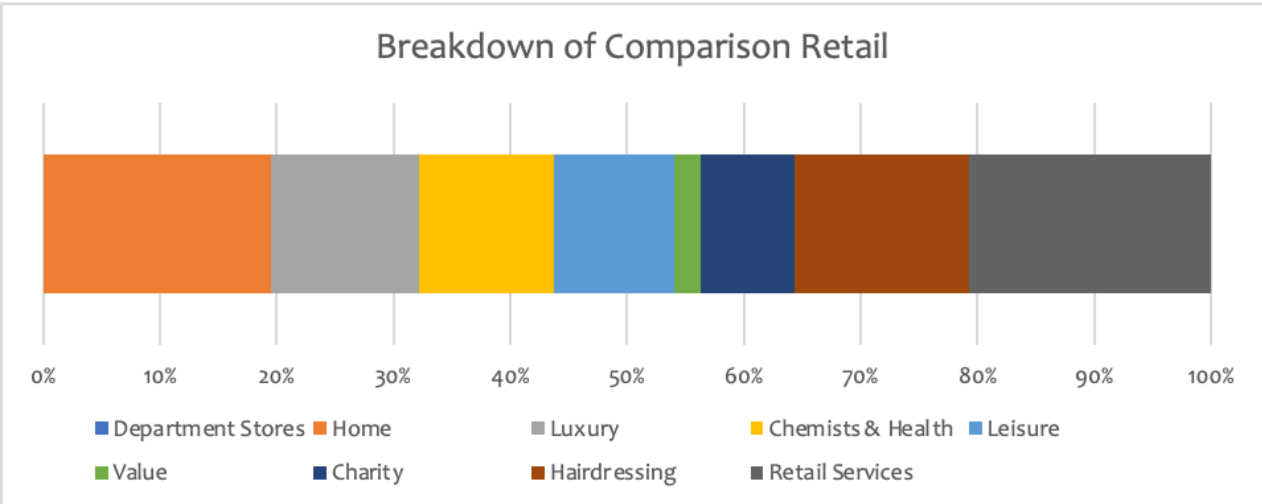
Full details of the changes including the full list of the new use classes and their previous equivalents are provided in People & Places downloadable guide to changing the town centre business mix.

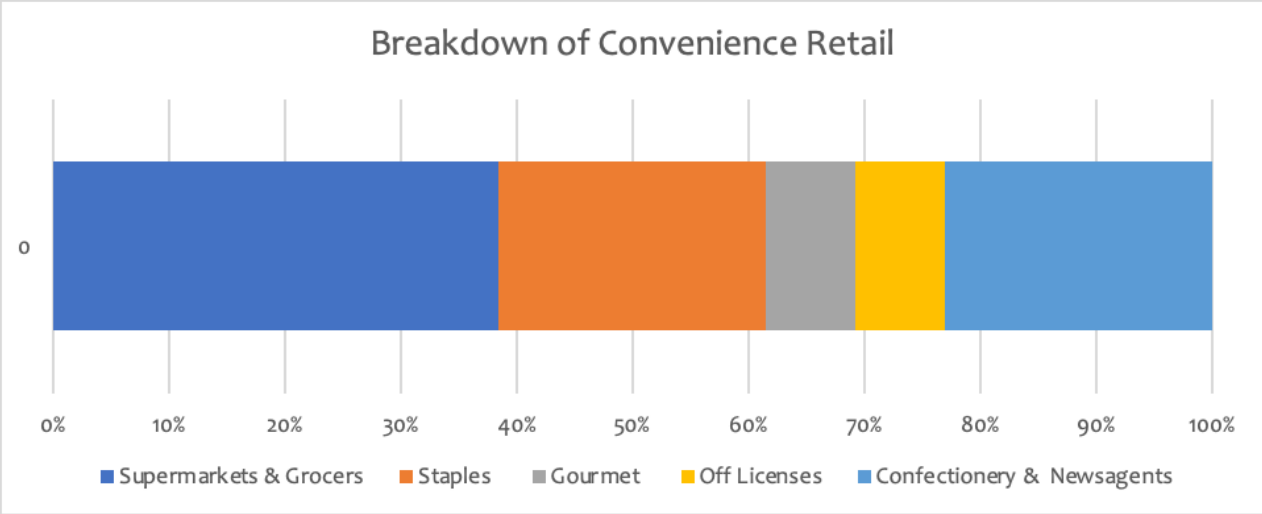
Class	Type of Use	Description
A1	Shops	Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes
A2	Financial and Professional Services	Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices
A3	Restaurants and Cafes	Food and drink for consumption on the premises- restaurants, snack bars and cafes
A4	Drinking Establishments	Public houses, wine bars or other drinking establishments (but not nightclubs)
A5	Hot Food Takeaways	Sale of hot food for consumption off the premises
B1	Businesses	Offices (other than those that fall within A2) research and development of products and processes, light industry appropriate in a residential area
B2	General Industrial	General Industrial
B8	Storage and Distribution	Warehouses, includes open air storage
C1	Hotels	Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels)
C2	Residential Institutions	Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres.
C2A	Secure Residential Institution	Use for a provision of secure residential accommodation, including use as a prison, young offender's institution, detention centre, secure training centre, custody centre, secure hospital, secure local authority accommodation or use as a military barracks.
D1	Non-Residential Institutions	Clinics, health centres, crèches, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, law court, non-residential education and training centres.
D2	Assembly and Leisure	Cinemas, music and concert halls, bingo and dance halls (not nightclubs), swimming baths, skating rinks, gymnasiums or areas for indoor /outdoor sports/ recreation (except motor sports/ firearms).
SG	Sui Generis ("unique" establishments)	Theatres, hostels providing no significant element of care, scrap yards, petrol filling stations and shops selling and/ or displaying motor vehicles, retail warehouse clubs, nightclubs, launderettes, taxi business, amusement centres, casinos, haulage yards, transport depots, veterinary clinics, dog parlours, tanning and beauty salons and tattoo studios.

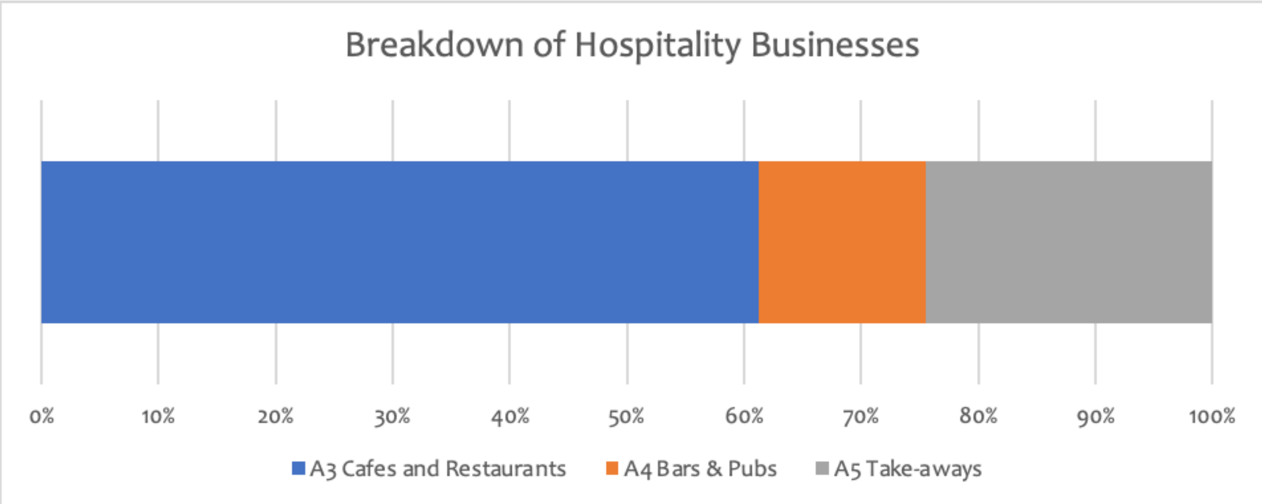
Level 1 & 2 classification	National Large Towns %	Letchworth (number)	Letchworth %
A1 Retail	**49%**	**108**	**46%**
A1 Comparison Retail	**40%**	**95**	**41%**
Comparison (Fashion)	-	8	3%
Fashion & Clothing (children)	-	2	1%
Fashion & Clothing (men)	-	1	<1%
Fashion & Clothing (mixed)	-	1	<1%
Fashion & Clothing (women)	-	3	1%
Footwear	-	1	0%
Fashion & General Clothing Accessories	-	0	0%
Other Comparison Retail	-	87	37%
Department Stores	-	0	0%
Home	-	17	7%
Luxury	-	11	5%
Chemists & Health	-	10	4%
Leisure	-	9	4%
Value	-	2	1%
Charity	-	7	3%
Hairdressing	-	13	6%
Retail Services	-	18	8%
A1 Convenience Retail	**9%**	**13**	**6%**
Supermarkets & Groceries	-	5	3%
Staples	-	3	1%
Gourmet	-	1	<1%
Off Licenses	-	1	<1%
Confectionery & Newsagents	-	3	1%
A2 Financial & Professional Services	**13%**	**21**	**9%**
Banks & Building Societies	-	4	2%
Estate Agents & Auctioneers	-	9	4%
Professional Services	-	4	2%
Repair Services	-	4	2%
A3 Cafes and Restaurants	**10%**	**30**	**13%**
A4 Bars & Pubs	**4%**	**7**	**3%**
A5 Take-aways	**5%**	**12**	**5%**
B1 Offices	**3%**	**3**	**1%**

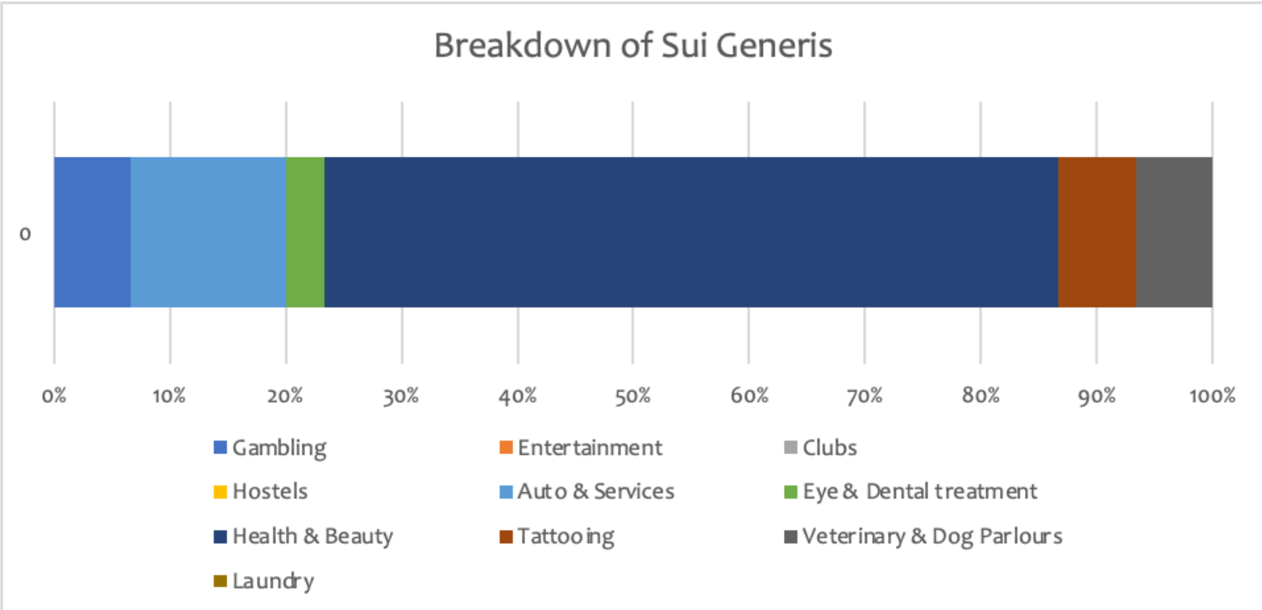
B2 Light Industrial	**1%**	**0**	**0%**
C1 Hotels & Accommodation	**2%**	**2**	**1%**
D1 Non-residential Institutions	**4%**	**15**	**6%**
Medical	-	3	1%
Civic Buildings	-	8	3%
Education & Learning	-	3	1%
Places of Worship	-	1	0%
D2 Assembly and Leisure	**2%**	**5**	**2%**
Sui Generis	**7%**	**30**	**13%**
Leisure	-	2	1%
Gambling	-	2	1%
Entertainment (theatre & concert halls)	-	0	0%
Clubs	-	0	0%
Hostels	-	0	0%
Auto & Services	-	4	2%
Personal	-	24	10%
Eye Treatment; Dentists & Hearing	-	1	0%
Health & Beauty	-	19	8%
Tattooing	-	2	1%
Veterinary & Pet Grooming	-	2	1%
Laundry	-	0	0%
TOTALS	**100%**	**233**	**100%**


Letchworths' Businesses by Class (%)
3%
26%
6%
17%
11%
5%
4%
9%
1%
0%
7%
2%
9%
A1 Comparison Retail (Fashion)
A1 Comparison Retail (Other)
A1 Convenience Retail
A2 Financial & Professional Services
A3 Cafes and Restaurants
A4 Bars & Pubs
A5 Take-aways
B Offices & Light Industrial
C1 Hotels & Accommodation
C2 Residential Institutions
D1 Non-residential Institutions
D2 Assembly and Leisure
SG Sui Generis


Breakdown of Comparison Retail
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
100%
Department Stores
Home
Luxury
Chemists & Health
Leisure
Value
Charity
Hairdressing
Retail Services


Breakdown of Convenience Retail
0
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Supermarkets & Grocers
Staples
Gourmet
Off Licenses
Confectionery & Newsagents


Breakdown of Hospitality Businesses
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
A3 Cafes and Restaurants
A4 Bars & Pubs
A5 Take-aways


Breakdown of Sui Generis
0
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
Gambling
Entertainment
Clubs
Hostels
Auto & Services
Eye & Dental treatment
Health & Beauty
Tattooing
Veterinary & Dog Parlours
Laundry

Fashion retail

Fashion retail is considered an important attraction for regular shoppers to a town. In small, rural towns this may be characterised by a modest number of independent, ladies fashion retailers with a distinctive or somewhat exclusive offering that can attract shoppers from a wider area. Other elements of fashion retail (men's, children's, shoes) will tend to be under-represented in smaller towns. The presence of premium fashion chains in small towns will be indicative of a wider catchment area including day-visitors and tourists. Popular, multiple fashion retailers in medium-format stores may be present in the slightly larger towns and indicate their role as a local shopping destination.

The data indicates that there is a modest mix of fashion retail in Letchworth that offers women's (1%), men's (<1%), children's (1%) and mixed (<1%) fashion. Some of these outlets offer fashion and general clothing accessories, however there is no shop dedicated to accessories specifically. The overall low numbers of fashion retailers indicate that the town centre offers limited options of everyday fashion for the whole family and therefore the majority of needs will have to be met elsewhere.

Other comparison retail

Towns will typically have a high proportion of other comparison retail that form an important part of the choice offered to customers and their perception of a place. Comparison shopping is defined by the Government's Planning Portal as retail items not bought on a frequent basis, for example, fashion and electrical goods.

Department store: The continued presence of a vibrant department store in medium-sized town centres offers a key attraction to customers and probably indicates the town is a local shopping destination with a wider catchment.

Home: A high proportion of retailers focused on providing goods for the 'home' (electrical goods furniture, carpets, kitchens & bathrooms, DIY, hardware, florists & gardening) is indicative of a town centre that is serving many of the routine needs of the local population. Such retail remains very vulnerable to competition from elsewhere including out-of-town retail, other larger centres and on-line.

Luxury: A town centre with a high proportion of so-called 'luxury' retailers (gifts, china, leather goods, jewellers, books, arts & crafts, antiques) is indicative of a catchment that extends beyond the local population and is more dependent on visitors or special interest trade.

Leisure: This a mixed category (sports, toys, cycle shops, hobbies, pet shops & supplies, travel agents) that serves local and specialist needs. A high proportion of such businesses may indicate a wider catchment area or that the town is situated in an area known for outdoor leisure activities.

Chemists and health: A small proportion of chemist and health businesses (opticians; chemists /toiletries, beauty products, health foods & products) is a normal part of the retail mix meeting the routine needs of local residents.

Value: The presence of discount stores will normally be limited to a maximum of one or two independent businesses in small towns and multiples will only be present in slightly larger towns serving a larger, cost-conscious population.

Charity: The presence of charity shops is typical and often much maligned element of town centre retail that nevertheless adds diversity. The case for the positive contribution of charity shops to the local economy, community and environment is well-represented by the Charity Retail Association. Where there is an over-representation of charity shops the impact needs to be considered in terms of whether they are occupying otherwise vacant units of alternative, viable businesses.

Hairdressers: It is a characteristic of modern town centres that a relatively high proportion of businesses will be retail services such as hairdressers. Whilst local opinion may be disparaging of growth in such provision, these are stable businesses that face more limited competition from other localities, provide a use for premises and help attract modest footfall.

Retail services: Businesses providing services such as dry cleaners, clothing repairs and funeral services will typically be a small yet consistent part of the retail mix in town centres meeting local need.

As the dashboard illustrates, Letchworth's comparison retail (apart from fashion) accounts for 87 businesses or 37% of total business mix. This is mostly made up of 18 retail services such as dry cleaners, funeral directors, phone sales and services, 17 retailers selling household items, 13 hairdressers and barbers, 11 businesses selling more luxury items, 10 chemists and health retailers and 7 charity shops. Value stores comprise only 1% of the total business mix and therefore this category is not overly represented in the town centre.

There is no department store in Letchworth, however, there are three shopping quarters of different character – Garden Square Shopping centre focused mainly on meeting everyday needs, The Wynd and the Arcade. The two latter shopping quarters consist of independent businesses, predominantly offering comparison retail such as gifts, various retail services and hospitality venues.

Convenience retail

Convenience retail is defined by the Government's planning portal as everyday essential items, such as food. It is usually a small percentage of overall retail provision though encourages regular shopping trips.

Supermarkets & groceries: The presence of town centre supermarkets provides an opportunity to boost footfall more widely if accompanied by medium-stay parking and good pedestrian access links to the town centre. This is preferable to development of out-of-town stores or 'leakage' caused when it is necessary for local shoppers to travel to other towns. Smaller format grocery stores enable top-up shopping as part of a town centre trip.

Staples: Food shops such butchers, bakers, greengrocers are very important parts of the retail mix and help encourage regular, local footfall. Typically, they indicate readily accessible, smaller town centres. It is important to maintain such provision in a way that maintains and strengthens the appeal of town centres to existing and potential new customers by enabling 'pop-and-shop' parking, 'linked-trips' to supermarkets and innovative marketing as they are under increasing pressure.

Gourmet: The presence of food businesses such as delicatessens, tea and coffee suppliers, cheese shops and fishmongers denote a less cost-conscious customer-base. These businesses may in-part be dependent on custom from day visitors and tourists at least for part of the year. They are important in providing a distinctive shopping experience and creates customer loyalty.

Off licenses: Most towns will have some sort of drinks outlet as part of its retail mix. The distinction and mix of discount stores, regular off-license and specialist beer or wine outlets will be indicative of the customer-base for a town centre.

Confectionery & newsagents: Confectionary shop and newsagents are consistently a small part of the retail mix in a vibrant ton centre.

There are 13 convenience retailers in Letchworth town centre, with 5 of those (2% of the total business mix) compromising supermarkets and grocers. Out of these Morrisons is the only large format store in the town centre that can meet most or all of people's weekly grocery needs. There are smaller Iceland and Sainsbury's stores and two independent grocery stores. In addition, the town centre has a fruit and vegetable stall, two butchers, an independent deli/organic outlet. Furthermore, there are two newsagents, one of which is a WHS Smith multiple, one post office and one off-licence.

Such a mix indicates that despite relatively small proportion of outlets (6% out of total retail mix), the town centre offers various options for general and some specialist grocery shopping. There is a lack of gourmet food retailers such as delicatessens, tea and coffee suppliers, cheese shops and fishmongers that would denote a less cost-conscious customer-base and visitor appeal.

Financial & professional services

A mix of various financial and professional services is an essential part of a vibrant town centre serving local customers.

Banks & building societies: Banks and building societies ae very important to the economic health of a town centre in providing a service to businesses and especially older customers. Their cash machines are an important and readily available source of cash. Small towns are, however, ever-increasingly vulnerable to ongoing programmes of bank closures.

Estate agents & auctioneers: Estate agents typically comprise a small though significant per centage of town centre businesses. Although they have a very specific customer-base they are part of the overall economic activity and upkeep of the town.

Professional services: Solicitors, accountants, insurance companies, financial advisers and photographers are an important part of local service provision.

Repair services: Services such as cobblers, locksmiths, engraving and film developers are defined as separate to retail though they provide routine and necessary functions as part of the business within town centres.

Letchworth town centre has a slightly lower proportion of financial and professional services (9%) compared with large towns nationally (13%). This number is comprised by 9 estate agents, 4 banks and building societies, 4 job centres and financial advisors, and 4 repair services such as a key cutters and shoe repairs. Such numbers indicate that the town centre provides its users with a sufficiently diverse service offer, including important banking facilities.

Food and drink

Taken collectively, food and drink establishments are important parts of the town centre business mix that can help encourage footfall, increase dwell times, contribute greatly to the visitor economy and underpin the evening economy as a growth area in town centre economic activity.

Cafes and Restaurants: Whilst some regular users will often be critical of the opening of "yet another café" they are a critical part of the distinctive social and leisure mix of town centres in a way that encourages footfall and dwell-times. Along with restaurants, a mix of appealing cafes will be very important in encourage day-visitors and tourists to the town centre. A mix of suitable restaurants will be in key in underpinning a flourishing evening economy for different local markets and visitors.

Bars & pubs: A mix of suitable bars and pubs will be in key to enabling a flourishing evening economy that attracts different local markets and visitors. The predominant character of town pubs and bars will reflect the customer-base.

Take-aways: A small though significant part of the business mix in most towns will be take-aways. Although closed during the day, they are an important part of the evening economy and typically appeal to a younger customer-base.

Letchworth is well served with cafes and restaurants (13%), slightly exceeding levels of larger towns nationally (10%). The number of bars (3%) and take-aways (5%) is comoparable with the national benchmarks. This hospitality offer suggests that the social and leisure function of the town centre is being served well, providing users with enough hospitality services.

Offices, light industrial and storage

Such uses do not tend to be focused on town centres and are more likely to be clustered in out-lying business parks or industrial estates. Neither do these various business types also do not tend to be customer-facing in the same sense as retail and other services though they add to the wider economy. Where they are well-represented in or around the town centre, they contribute to regular footfall.

Letchworth's proportion of town centre offices (1%) is slightly lower compared to that typical larger towns (2%), though there are some particularly large premises in and around the centre that can contribute to footfall.

Hotels & accommodation

The presence of a significant number of bed spaces provided through hotels, guest houses, holiday parks and other serviced accommodation, positively reinforces a town centre's role in the visitor economy.

There are 2 sizeable hotels (1%) in Letchworth town centre which is lower than national average (4%) as a proportion though probably accounts for considerably more rooms than for a town of such size. This indicates that while anticipating some tourists and business travellers, the travel industry can only be a partial focus.

Residential institutions (care)

Institutions such as care homes and hospitals provide local social services and can contribute footfall by staff, patients and visitors. In some town, the presence of relatively large boarding schools determines the character of the town centre and creates footfall from students, staff and occasionally visiting parents.

Residential institutions (secure)

Secure institutions such as young offender's institution; detention centres, secure hospitals, and military barracks are rare components of town centres though can provide additional footfall by staff.

Non-residential institutions

This comprehensive grouping accounts for the different civic and public services that can be found in town centres and are an important part of providing social functions in a way that that also attracts footfall more widely. Except for places of worship, all of these functions often face pressures to re-locate to more accommodating edge-of or out-of-town locations and so remove footfall.

Medical: This includes doctors' surgeries, health clinics and day centres that are an important of the social function of towns that underpins their role as 'community hubs'.

Civic buildings: Town centres with a high proportion of civic buildings such as government buildings, council services, community centres, law courts and libraries have an important community role and will attract footfall from a wider area.

Education & learning: Crèches, schools, colleges, training centres, museums and art galleries all add to the wider life and appeal of a community. Schools located close to town centre can cause congestion whilst significantly contributing to footfall at the beginning and end of the day. Museums and art galleries can help attract visitors if their appeal is beyond local interest.

Places of worship: Churches and other places of worship are a key part of the heritage and character of a town. They contribute footfall when services are on, can serve as community facilities for wider population and attract visitors.

Letchworth's percentage of non-residential institutions (6%) is slightly higher compared to large towns nationally (5%). This is indicative of a stable civic and service function for the local population and comes partly from its Garden City origins. This provision is made up of civic buildings, places of worship and medical facilities.

Assembly and leisure

Although usually only a small percentage of the overall number of town centre businesses and institutions, assembly and leisure facilities are very important in contributing to footfall, and vibrancy. Such facilities include cinemas; snooker halls; sports grounds & stadiums; party venues & function rooms. It is important to retain such functions as part of the town centre mix in a way that will benefit weekend, evening and visitor economies especially.

Assembly and leisure provision in Letchworth (2%) is slightly higher than that typical of towns nationally (1%), including 2 entertainment and gambling venues, gym, snooker club, events space and the impressive Broadway Cinema and Theatre.

Sui Generis

Certain uses do not fall within any use class and are categorised under the general heading 'sui generis' which literally means “of its own kind”. This is a large category that overall accounts for a growing proportion of town centre uses as part of the diversification of town centres. Here we sub-divide the classification to aid understanding.

Leisure: This sub-division includes gambling institutions such as betting shops and amusement arcades that have had a growing presence in town centres over recent years and are not welcomed by all residents. They nevertheless are part of the wider economy and contribute modest footfall.

The Leisure sub-division of Sui Generis very specifically includes theatres & concert halls that could equally have been considered as part of the ‘assembly and leisure’ function of town centres. Though not present in all small towns, such facilities can be a very important part of the evening and visitor economies.

The Leisure sub-division also includes night clubs; private clubs and social clubs that are an important part of the social life of town centres and evening economy alongside pubs and bars. Most small towns will have at least one social club of this type though night clubs will be restricted to medium-sized and larger towns.

Hostels are categorised as part of this sub-division.

Automotive

Automotive services including car dealers & accessories, petrol filling stations; vehicle hire, car wash & valet services, garage services, tyre dealers and taxis & private hire serve important local needs. Such uses are not necessarily located within town centres and may equally be located in surrounding areas. The proportion of such businesses in the town centre is not necessarily indicative of their wider presence.

Personal

The Sui Generis category includes a varied range of personal services that are a growing part of the business mix within town centres and meet local needs.

Dentists, hearing & eye treatment: Most town centres will have one or more dentists located in the town centre though there may be others in peripheral areas. Hearing specialists are increasingly part of the mix. Such provision can be considered alongside other health-related services such as clinics and opticians that are classified differently by the planning system.

Health & beauty: This is a category with growing representation in town centres and includes hair & beauty salons, beauty salons, alternative & complementary medicines, herbalists; tanning shops and nail salons. Although categorised differently, it should be considered alongside other retail services such as hairdressing.

Tattooing: Most small town centres will have at least one tattoo parlour and they are another example of the mix of services provided to meet local demand in a convenient way.

Laundry: This includes launderettes and laundry businesses as opposed to dry cleaning services that are categorised elsewhere. Launderettes will usually be present in small town centres focused on meeting local needs.

Veterinary & pet grooming: These distinct services for pet-owners may be part of the town centre mix as well as being provided in outlying areas, or in the case of grooming, even through mobile services.

The higher proportion of Sui Generis uses (13%) relative to large towns nationally (6%) is indicative of relative diversity with 2 leisure-focused businesses, 4 automotive businesses and a variety of personal services including 19 health and beauty related businesses such as nail salons, yoga and massage studios, alternative medicines, 2 tattooing shops and 1 dentist.

Overview

The business data for Letchworth indicates that current retail services focus on provision of goods for home, luxury and personal care, with a low provision of fashion related comparison retail indicating that some requirements will need to be met elsewhere. While the proportion of convenience retail outlets is relatively low (6%), it can serve much of the existing, local needs including through a town centre supermarket and smaller grocery stores. The combined proportion of comparison and convenience retail (46%) is only slightly lower than that of similarly sized towns (49%), because of the mix of other businesses.

The proportion of hospitality businesses is slightly higher when compared to other larger towns, indicating that town centre serves its social and leisure function well. Letchworth's professional service and office space provision is slightly lower than national average as a proportion though includes some sizeable premises on the edge of the centre that help contribute footfall.

Levels of Sui Generis uses (13%) are slightly higher compared to towns nationally (7%) and indicate presence of other diverse services.

Overall, the Letchworth town centre business mix seems suited to meeting the needs of local residents in terms of food staples, household goods, social life and civic function. Its business mix can be appealing to visitors in terms of its luxury retail, hospitality and leisure offer.

KPI 2: Commercial Units; Comparison versus Convenience

This KPI provides an overview of the composition of retail businesses alone by considering the split between convenience and comparison shops.

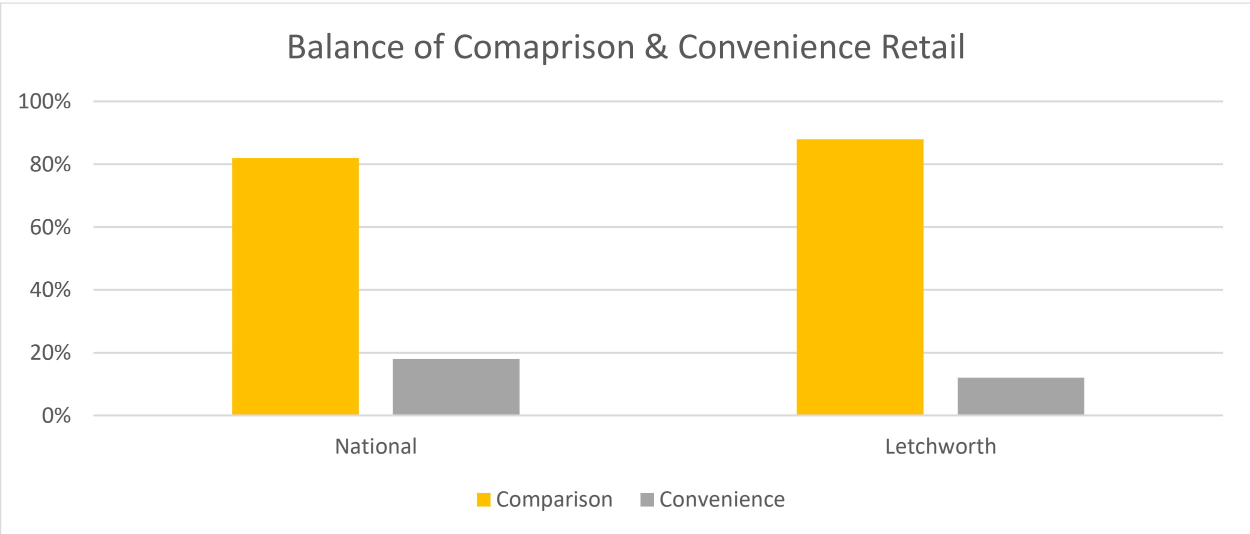
Convenience goods – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as: food and non-alcoholic drinks; tobacco; alcohol; newspapers and magazines; non-durable household goods.

Comparison goods – all other retail goods. Defined as: books; clothing and footwear; furniture, floor coverings and household textiles; audio-visual equipment and other durable goods; hardware and DIY supplies; chemists' goods; jewellery, watches and clocks; bicycles; recreational and miscellaneous goods; hairdressing.

The presence of a variety of shops in a town centre is important to its ability to remain competitive and continue to attract customers. A balance of both comparison and convenience retail units is therefore ideal in terms of encouraging visitors / potential customers. The following table provides a percentage of the A1 Shops which sell mainly comparison or convenience goods.

The table and chart indicate that more than nearly nine-in-ten of the Letchworth town centre shops are comparison retailers (88%). This proportion is slightly more than benchmarked, large towns nationally and indicates that Letchworth town centre has a healthy balance of comparison and convenience retailers. However, it will be important for these shops to have a distinctive offer pitched at local customers and/or potential visitors, to fend off competition from neighbouring centres and online. Modest increases in convenience, grocery retail would help encourage more regular footfall and movement around the centre.

	National Large Towns %	Letchworth (number)	Letchworth %
Comparison	82%	95	88%
Convenience	18%	13	12%



The modest proportion of everyday, convenience retail (12%) in Letchworth is slightly less than in the large towns nationally. Slight increase in convenience retail provision can be important in boosting footfall in the town centre. Convenience retailers include multiple independent grocers, two chain supermarkets, and several other convenience shops. These businesses meet local needs and attract footfall that other nearby town centre businesses could benefit from.

KPI 3: Commercial Units; Trader Types

The vitality of a town centre depends highly on the quality and variety of retailers represented. Certain national retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town. The character and profile of a town often also depends on the variety and mix of independent shops that can give a town a "unique selling point". A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town. The following shops is an updated version of a list of key attractors originally defined by Experian Goad.

Department Stores	Mixed Goods Retailers	Clothing
Debenhams	Argos	Primark
House of Fraser	Boots	Dorothy Perkins
John Lewis	TK Maxx	H & M
Marks and Spencer	WH Smith	New Look
Regional Dept. Stores	Wilkinson	River Island
Supermarkets	Other Retailers	Next
Sainsbury's	Superdrug	Zara
Tesco	Clarks	
Waitrose	Clintons	
Morrisons	HMV	
Asda	Waterstones	

Multiple traders have a countrywide presence and are well-known household names. Regional shops are identified as those with stores / units in several towns throughout one geographical region only and independent shops are identified as those that are specific to a town.

The following table provides a percentage of the A1 Shops which are key attractors, multiples, regional and independent to the locality.

	National Large Towns %	Letchworth (number)	Letchworth %
Key attractor	9%	5	2%
Multiple	29%	39	18%
Regional	6%	18	8%
Independent	57%	158	72%

The data for Letchworth indicates that there are 5 key attracts in the town centre. This number is comprised of 2 supermarkets (Morrisons and Sainsbury's), WHSmiths, New Look fashion store and Superdrug. The combined proportion of national multiples (18%) and regional multiples (8%) is lower than large towns nationally (35%). Such a proportion indicates that the town is a local service centre that meets most of its residents needs and offers some of the popular brands, however some demand by the users is probably not currently met locally. In contrast, proportion of independent businesses in Letchworth (72%) is higher than the one benchmarked on national level (57%) and thus could be used as part of a distinctive marketing message about characteristic identity of the town centre and distinctiveness of products available.

KPI 4: Commercial Units; Vacancy Rates

Vacant units are an important indicator of the vitality and viability of a town centre. The presence of vacant units over a period of time can identify potential weaknesses in a town centre, whether due to locational criteria, high rent levels or strong competition from other centres.

The following table provides the percentage figure of vacant units from the total number of commercial units.

	National Large Towns %	Letchworth (number)	Letchworth %
Vacancy %	13%	18	7%

The vacancy data for Letchworth indicates there are 7% of unoccupied units in the town centre which is lower than the level for benchmarked large towns nationally (13%). This indicates that available premises are being used comparable well, yet some areas of the town present some level of vacancy with the space for improvement.

KPI 5: Footfall & Foot-flow

The arrival and movement of people, whether as residents, workers, visitors or a shopper is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become. Whilst footfall monitoring was not part of the work proposed for Hertford, footfall data is available through a new monitoring system available through East Herts Council. The template overleaf, outlines the normal data that People & Places would look to assess using such a system.

Quarterly Footfall Performance Indicators Template		
Summary of Key Indicators for 1st Quarter 2019 & 2022	**Dates** (for same range of days)	**Dates** (for same range of days)
24 hours		
Total visits for period		
Busiest time of day		
Average dwell time		
Dwell over 90 minutes (%)		
Average visits per day		
Busiest zone		
Quietest zone		
Balance of repeat & new visitors		
Frequency of visits	Last week, Last month, Infrequent, New	Last week, Last month, Infrequent, New
Busiest 24hrs & number of visits (1st year & comparison)		
Busiest 24hrs & number of visits (2nd year & comparison)		
Day time (08.00-18.00)		
Total visits for period		
Busiest time of day		
Average dwell time		
Dwell over 90 minutes (%)		
Average visits per day		
Busiest zone		
Quietest zone		
Balance of repeat & new visitors		
Busiest day & number of visits (1st year & comparison)		
Busiest day & number of visits (2nd year & comparison)		
Evening (18.00-23.00)		
Total visits for period		
Busiest time of day		
Average dwell time		
Dwell over 90 minutes (%)		
Average visits per evening		
Busiest zone		
Quietest zone		
Balance of repeat & new visitors		
Busiest evening & number of visits (1st year & comparison)		
Busiest evening & number of visits (2nd year & comparison)		

KPI 6: Car Parking

It is important to understand the way users access a town centre and the opportunity for improvements. This has a big impact on the arrival points into a town and the foot-flow around it. Inadequate or poor-quality provision can also provide perceived and real barriers to people's use of a town centre that will affect the frequency and duration of visits. The need to reduce carbon emissions and the changes in mobility during the pandemic, serve to add to the importance of adding to the need to understand how users travel to town centres.

The provision of adequate and convenient car parking facilities is a key element of town centre vitality. An acceptable number of available spaces with a regular, quick turn-over for shoppers are the ideal, while adequate longer-stay, less convenient spaces for local owners/ workers and visitors must be considered too. As an informal rule of thumb advocated by the British Parking Association, at least 15% of parking spaces should be available at busy times to ensure customers have no difficulty parking.

Data for off-street parking provision was gathered during the access audit visit and from North Herts Council, supplemented by data on private car park parks available on Parkopedia. Data on car park occupancy level was not collected as part of this survey. In the table below the data is broken down into the following categories:

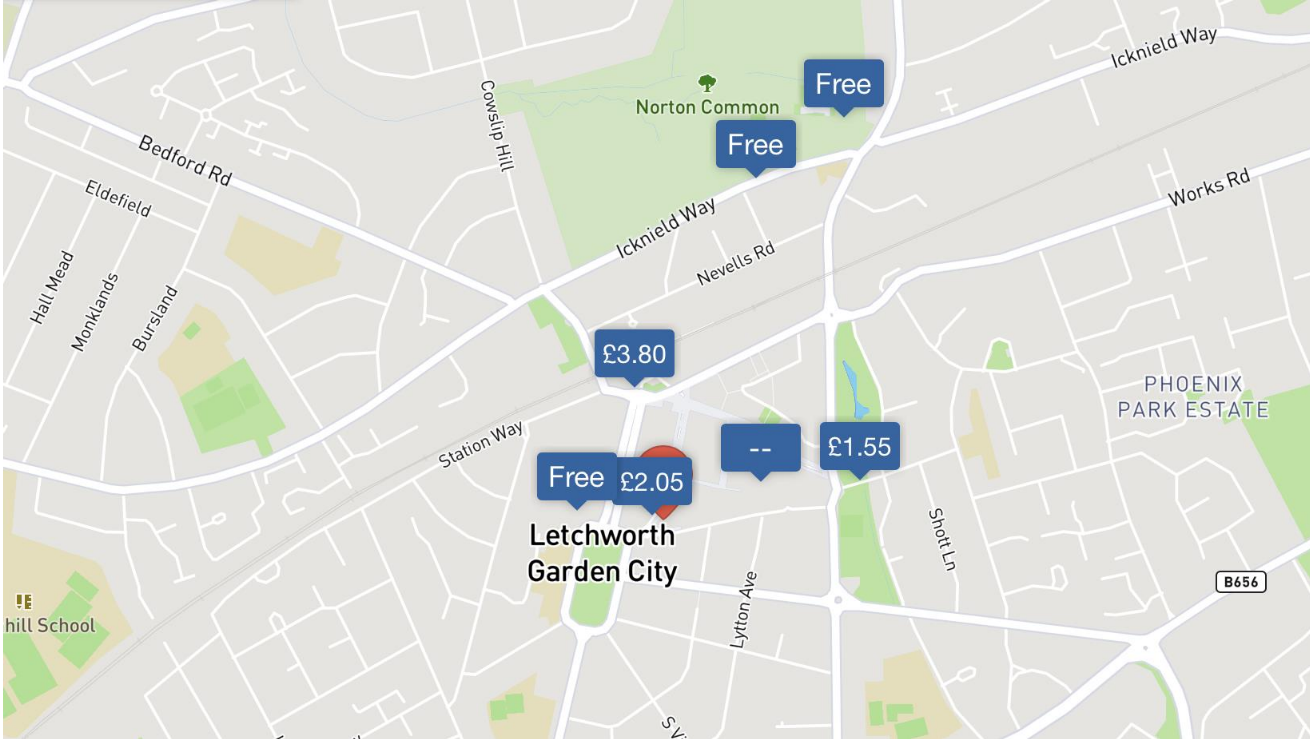
- Percentage and number of spaces in designated car parks
- Percentage and number of short-stay and long-stay

The Initial data collected for 3 public car parks and 2 private car park serving Letchworth town centre shows there are a total of 913 spaces. Short-term (43%) and long-term (57%) ratio is representative of national benchmark. Of those spaces offered on a long-term basis, 428 are in public car parks.

A further 174 spaces are available in more peripheral sites around Norton Common serving Bowling Club and Swimming pool and likely cater largely their own users.

The chart below compares these figures for parking in Letchworth to national benchmarks and the table overleaf gives details for individual car parks. The map overleaf shows the location of car parks and indicates cost for half hour pop-and-shop park at 9am on a mid-week morning.

	National Large Towns %	Letchworth (number)	Letchworth %
Car parks			
Total spaces:		913	913
Short stay spaces (<4 hours)	45%	395	43%
Long stay spaces (>4 hours)	55%	518	57%



Car park location	Short-stay	Long-stay	Total	Cost for 1 hr	Cost for 4 hrs	Walk to town centre	Notes
Town centre parking							
Letchworth Station	0	90	90	£ 1.20	n/a	7 mins	Short & long-stay
Morrisons	300	0	300	Free	n/a	4 mins	Customers (3 hr max)
Town Hall	95	0	95	£ 1.10	£ 5.05	1 mins	Short stay (4 hr max)
Garden Square	0	358	358	£ 0.70	£ 4.55	5 mins	Short & long-stay
Hillshott	0	70	70	£ 0.70	£ 3.20	10 mins	Short & long-stay
Totals	**395**	**518**	**913**				
Peripheral parking (>15 mins)							
Norton Common Swimming pool	62	0	62	Free	£ 1.75	23 mins	5 hours maximum
Norton Common Bowling Club	33	0	33	Free	£ 1.75	19 mins	5 hours maximum
Totals	**0**	**174**	**174**				

Key Findings: The People

KPI 7: Business Confidence Survey

The business confidence survey is an important part of engaging local businesses by understanding their perceptions and priorities. It is a first step in working with them and local businesses groups to help develop solutions.

Characteristics of businesses surveyed

Survey forms were electronically distributed to all the town centre businesses in Letchworth. The following percentage figures are based on the 64 returned business confidence surveys from a total of 249 town centre businesses and organisations. This is a return rate of 26% compared to 25% nationally and suggests good level of interest within the town's business community. It is also indicative of a presence of independent retailers that are often owner-managed and more engaged in partnership working.

Nature of business	All Letchworth business types	Letchworth business types surveyed (no.)	Letchworth business types surveyed (%)
What type of business or organisation are you?			
Convenience retail (A1)	6%	17	27%
Comparison retail (A1)	41%	14	22%
Financial/professional (A2)	9%	9	14%
Hospitality (A3, A4, A5)	21%	10	16%
Other	23%	14	22%
What type of ownership does your business have?			
National/multiple	24%	6	10%
Regional	8%	5	8%
Independent	68%	51	82%

Business background	National Large Towns %	Letchworth (number)	Letchworth %
How long has your business been in the town?			
Less than a year	6%	7	11%
One to five years	25%	19	30%
Six to ten years	12%	14	22%
More than ten years	58%	24	38%

Of the businesses that responded to the survey, 49% were shops of some kind, 14% were providers of services, 16% were hospitality businesses and 22% fell into category of 'other'. This is broadly representative of the town centre's business mix. Similarly, 82% of these respondents were independent businesses and this is also broadly representative. A total of 60% of these businesses are long-established in Letchworth, having been based there for more than six years. The fact that 11% of Letchworth's businesses surveyed had been established for less than a year and 30% for less than 5 years, may indicate a significant turnover in the town's traders.

Business' perceptions of the town centre

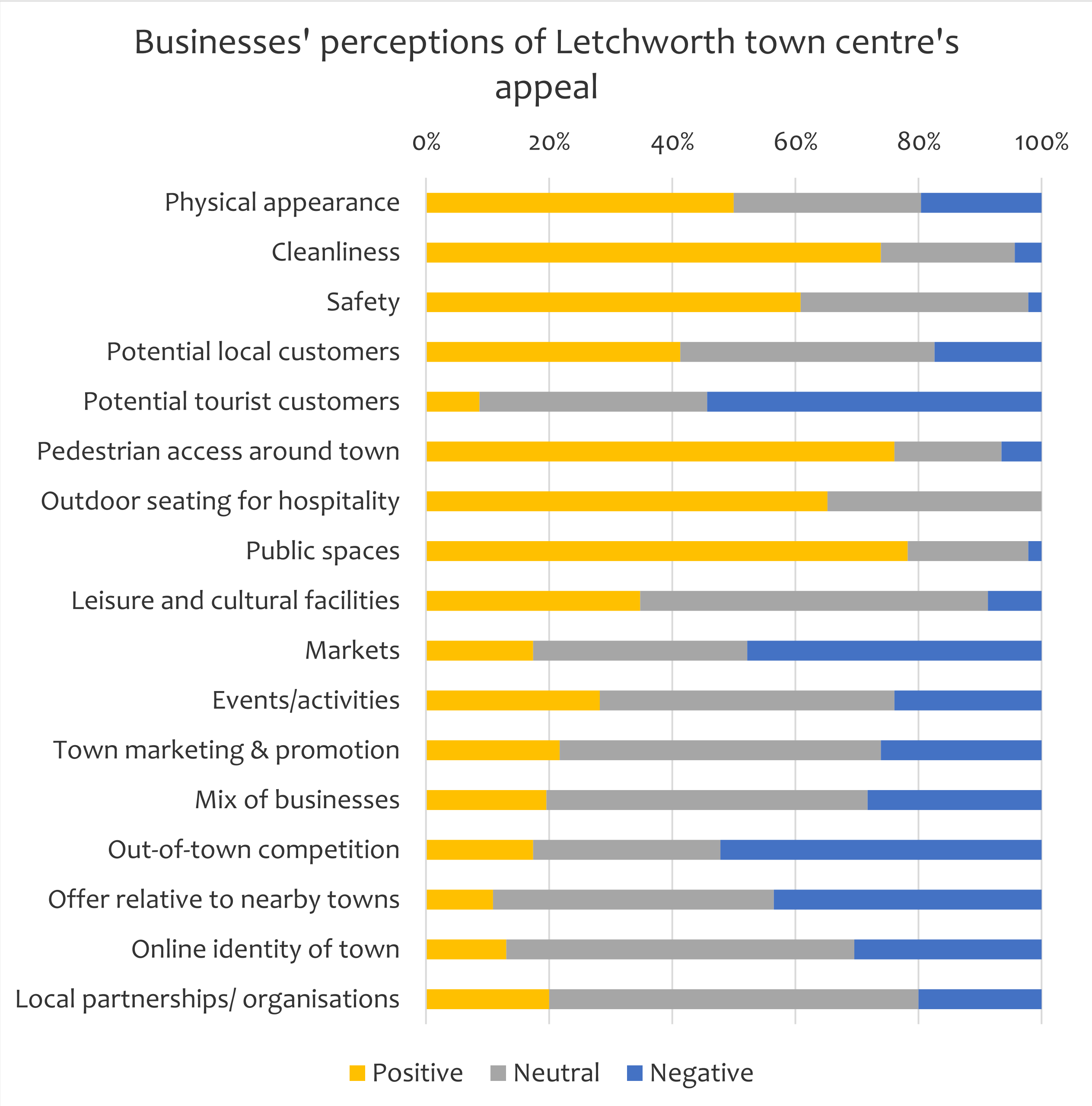
Letchworth town centre businesses were first asked about their opinions on town centre's appeal. From the responses to the survey, businesses appear most positive about the town's public spaces (78%), pedestrian access (76%) and cleanliness (74%). They are also moderately positive about outdoor seating for hospitality (65%) and safety (61%) and appreciate physical appearance (50%) and potential of local customers (41%) offered by the town centre.

Positive or negative aspects of the town centre's appeal	National Large Towns %			Letchworth %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Physical appearance	47%	33%	20%	50%	30%	20%
Cleanliness	-	-	-	74%	22%	4%
Safety	-	-	-	61%	37%	2%
Potential local customers	72%	26%	2%	41%	41%	17%
Potential tourist customers	82%	16%	2%	9%	37%	54%
Pedestrian access	-	-	-	76%	17%	7%
Outdoor seating	-	-	-	65%	35%	0%
Public spaces	38%	39%	23%	78%	20%	2%
Leisure & cultural facilities	-	-	-	35%	57%	9%
Markets	29%	63%	8%	17%	35%	48%
Events/activities	24%	54%	22%	28%	48%	24%
Marketing & promotion	24%	54%	22%	22%	52%	26%
Business mix	57%	27%	16%	20%	52%	28%
Out-of-town competition	26%	40%	34%	17%	30%	52%
Offer of nearby towns	25%	68%	7%	11%	46%	43%
Online identity of town	-	-	-	13%	57%	30%
Local partnerships	37%	45%	18%	20%	60%	20%

Furthermore, businesses are majorly indifferent to the local partnerships (60%), online identity of the town (57%), leisure and cultural facilities (57%) and events and activities (48%)

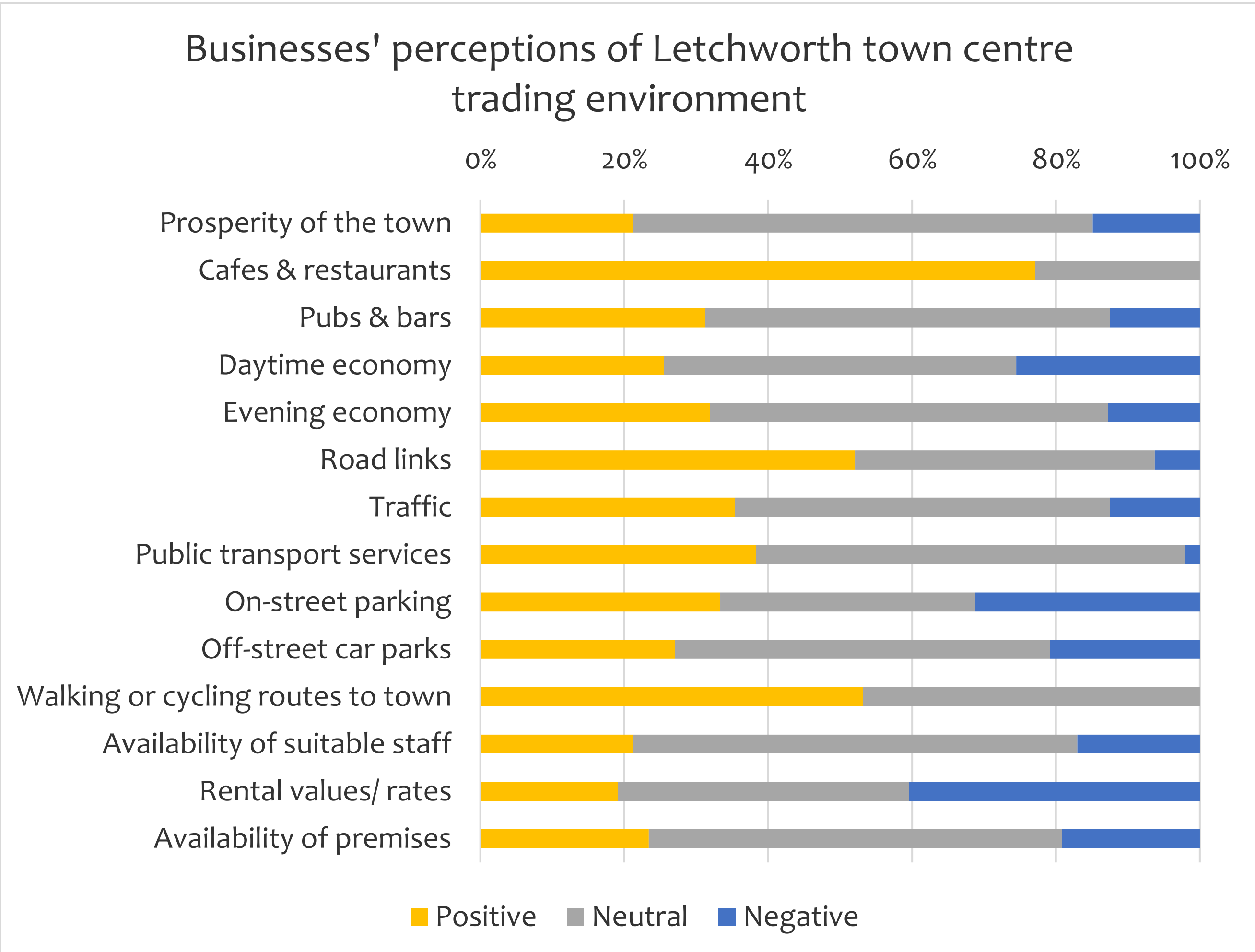
Businesses appear to be most negative about potential tourist customers (54%), out-of-town competition (52%), markets (48%) and existing offer if compared to nearby towns (43%).

These responses indicate that businesses view Letchworth's public spaces and pedestrian access as its strongest asset, feel indifferent about its local partnerships, online identity, events and leisure activities, and identify opportunities to attract out of town customers as a biggest issue.



Subsequently businesses were asked about their perceptions of the town's trading environment. In this case businesses appeared to be strongly positive about the town's cafes & restaurants (77%), followed by availability of walking and cycling routes to town (53%) and road links (52%).

Positive or negative aspects of the town's trading environment	National Large Towns %			Letchworth %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Prosperity of the town	-	-	-	21%	64%	15%
Cafes & restaurants	64%	34%	2%	77%	23%	0%
Pubs & bars	-	-	-	31%	56%	13%
Daytime economy	23%	69%	8%	26%	49%	26%
Evening economy	-	-	-	32%	55%	13%
Road links	55%	30%	14%	52%	42%	6%
Traffic	29%	36%	36%	35%	52%	13%
Public transport services	61%	25%	15%	38%	60%	2%
On-street parking	29%	17%	55%	33%	35%	31%
Off-street car parks				27%	52%	21%
Walking or cycling routes	-	-	-	53%	47%	0%
Availability of suitable staff	-	-	-	21%	62%	17%
Rental values/ rates	33%-	36%	31%	19%	40%	40%
Availability of premises	39%	48%	13%	23%	57%	19%



Responses showed that businesses are majorly indifferent to prosperity of the town (64%), availability of suitable staff (62%), public transport services (60%), availability of premises (57%) and pubs and bars (56%).

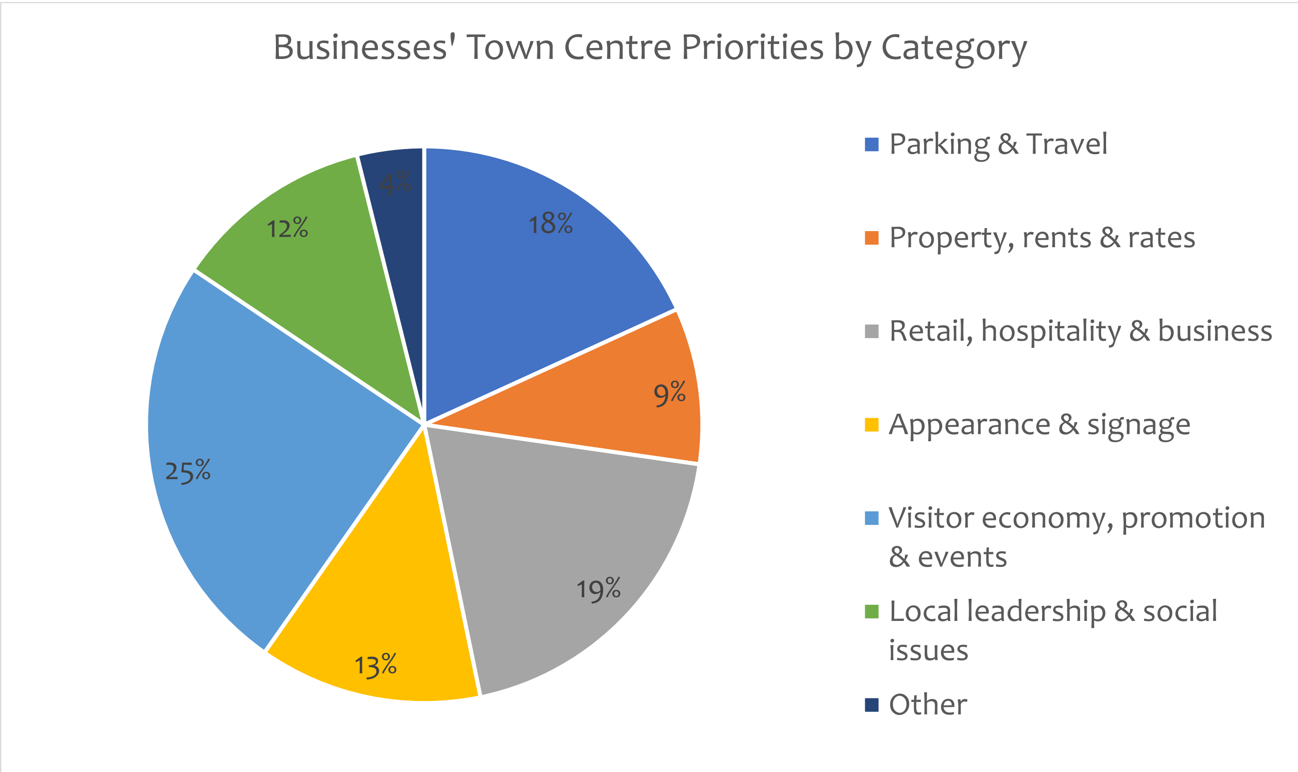
Businesses appear to be negative about rental values (40%) and moderately so about parking on-street (31%) and off-street (21%) and the daytime economy (26%).

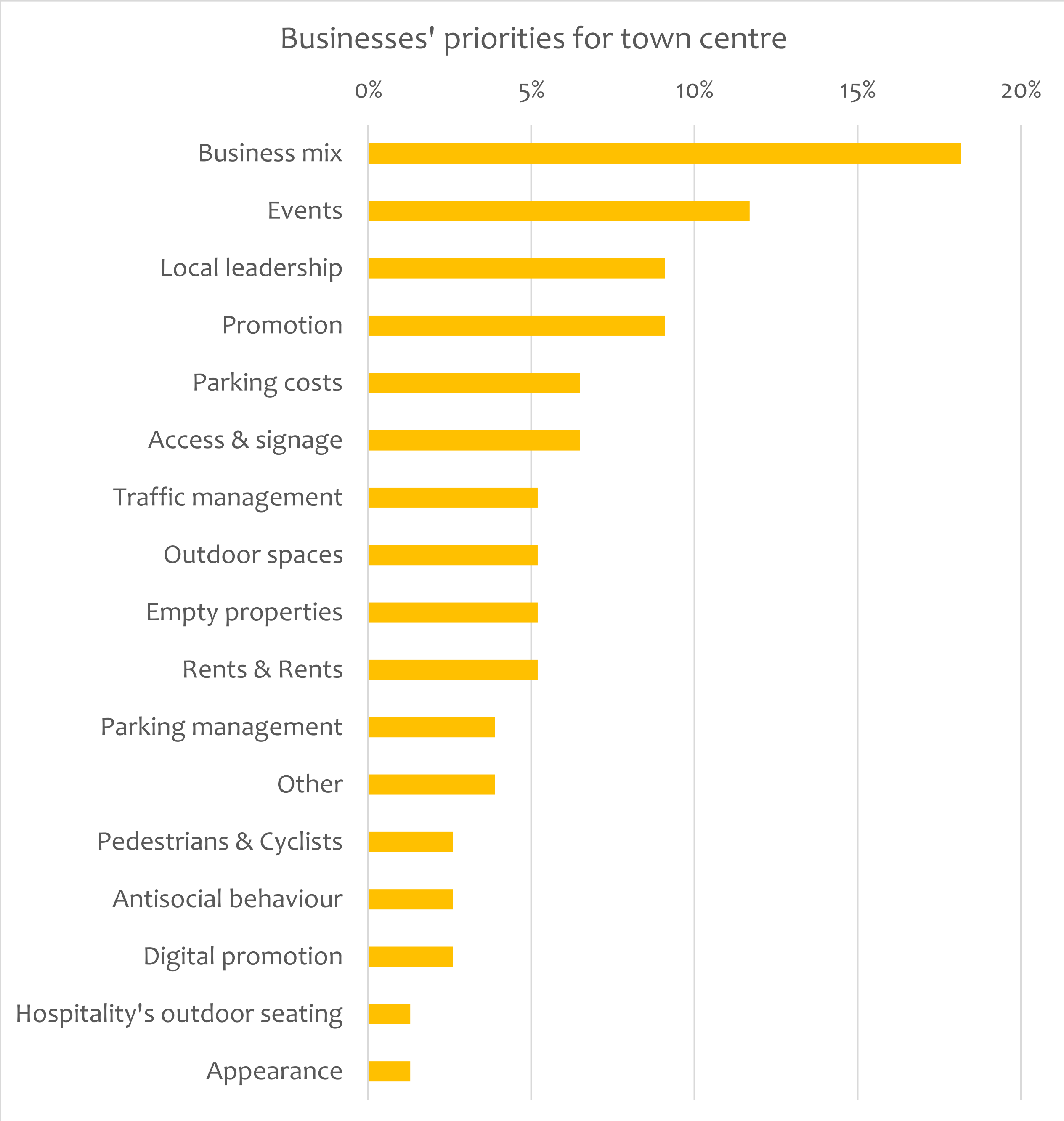
This second category of responses indicates that businesses view the hospitality industry as a strong aspect of Letchworth's trading environment. Town centre's connectivity to the surrounding areas via walking and cycling routes and road links are perceived as a strong feature. There was some indifference towards these aspects along with prosperity of the town, staff and premises availability and public transport services. Similarly, rental values are perceived as the most negative aspect of town's trading environment, yet with similar response among businesses being indifferent to this issue.

Business priorities for improving the town centre

When businesses in Letchworth were asked to propose two suggestions to improve the town centre, the top priority for businesses was promotion of the town through events, better marketing and visitor economy (25%). There were specific sentiments to improve digital promotion of the town in additional to regular marketing.

The second highest priority for businesses were factors connected with improving the retail and business mix (19%), highlighting need to diversify current offer across retail and hospitality.





A further 18% of comments focused on issues related to parking and travel management and provision. Sentiments were related to improved management of traffic and one way system, reduction in parking costs and stay limits, and improved cycling routes and wider pedestrianisation.

Appearance & signage has been mentioned in 13% of responses, with sentiments made regarding improved way finding, around the Wynd in particular, and better provision and maintenance of outdoor and greenspace.

Another 12% of comments were made in relation to local leadership and anti-social behaviour highlighting necessity for a more transparent communication and better policing, in regards of anti-social behaviour in particular.

Finally, 10% of comments touched upon the high level of vacancy within the town centre and rental costs.

The chart above categorises all the comments received from town centre businesses, whilst below is a selection of four key comments from the top seven categories. The figures in brackets are a reminder of the total number of comments received for each issue. A full list is available in a separate appendix to this report.

Business mix (14)

- Expanding and diversifying hospitality business in the town centre and allowing more choice for people to go to in the town centre.
- More independent quirky or big chain clothes shops men and women
- We need clothes shops
- More variety of shops not just eatery and pub

Events (9)

- Bringing more entertainment and live events in the town.
- A local music festival would be a great idea, see Balstock in Baldock
- Regular artisanal food arts crafts festivals/markets
- More cultural diversity- live music/ theatre

Local leadership (7)

- Quicker and more streamlined permissions to do outdoor events such as have food trucks able to come onto The Wynd and not having to pay extra and do extra admin for pavement licenses
- A serious review of communication from all linked associations to commercial properties within the town square and surrounding streets.
- Not heard or seen from Town Manager in nearly 2 years. Would appreciate more communication
- Nothing goes on at all down Towards the bottom of Leys Avenue to support businesses there

Promotion (7)

- Promote the Arcades More as this is where many independents start up
- More advertising of local businesses
- Wider marketing on rail & bus routes encouraging new visitors selling the positives as a day out
- Put Letchworth on the map by running a world championship even if it is only paper airplane flying

Parking costs (5)

- Parking cost and availability. Local towns have trialled free parking to entice shoppers rather than going to shopping complexes
- Cheaper/free car parking
- Free Parking
- Free parking for 3 hours

Access & signage (5)

- Improved modern signage and digital signage
- You are here type boards signposting areas of the town connecting it up. It could be created by a local artist or even school children.
- Better signage of The Wynd and businesses on there - plus getting The Wynd tree surrounds sorted!
- Update the information boards relative to The Wynd so that they are an accurate and up to date representation of the current businesses located there

Traffic management (4)

- Better more thought out road access! Bit late now
- Change the one way system
- Review the one way system - when you leave keys avenue to get to the A1 you have to join the lengthy queue to the station Rd roundabout in the wrong direction. Bonkers Business impacts
- Sort out traffic

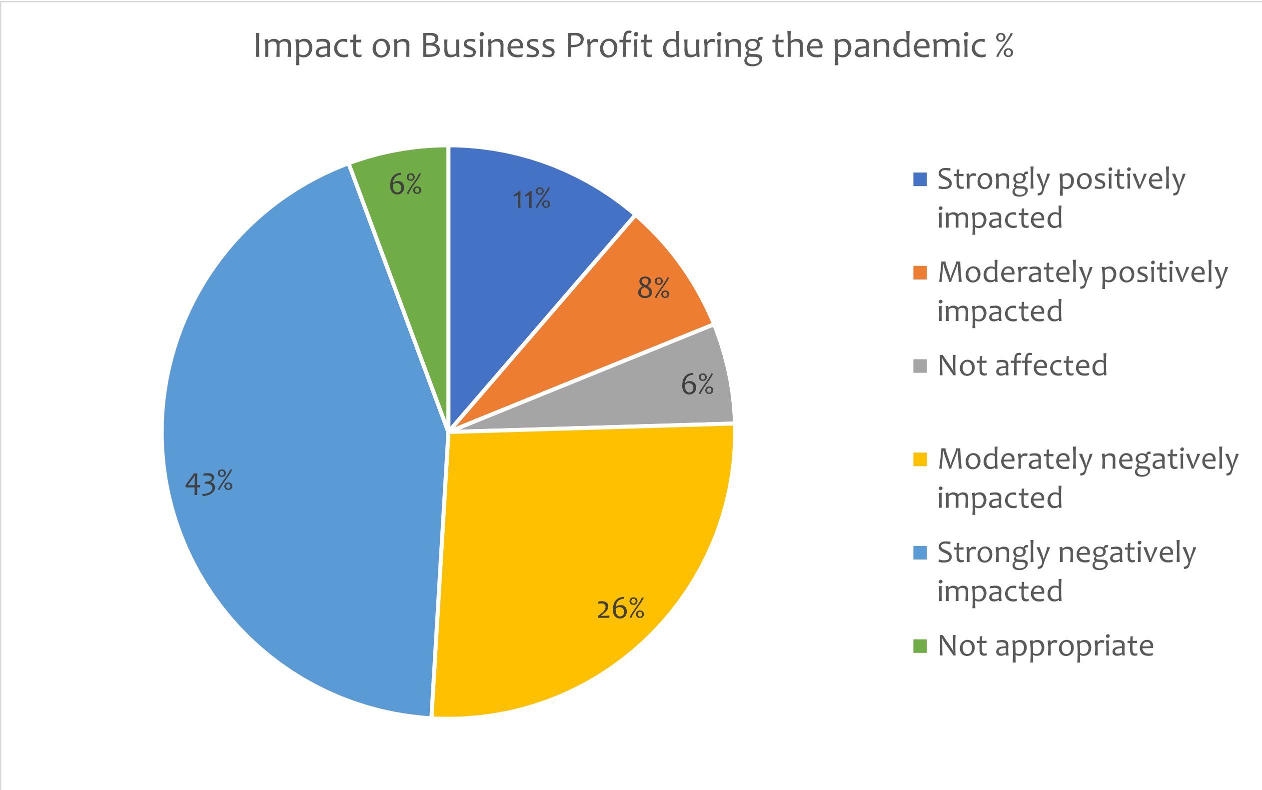
Business performance

Town centre businesses in Letchworth were asked about the impact of COVID-19 & its economic implications on recent and future projected trading. These questions were included to provide insights about the performance of different types of businesses; the impact of differently targeted restrictions on trading and the influence of changing customer behaviour including working more locally from home. They were asked two specific questions and asked to rank the impact on profits between strongly positively and negatively impacted:

- Compared to pre-pandemic levels, over the 12 months to December 2021, how was your business' profit impacted by COVID-19 and other issues?
- Over the 12 months from March 2022, how do you think your business' profits will be compared to 'normal', pre-pandemic trading?

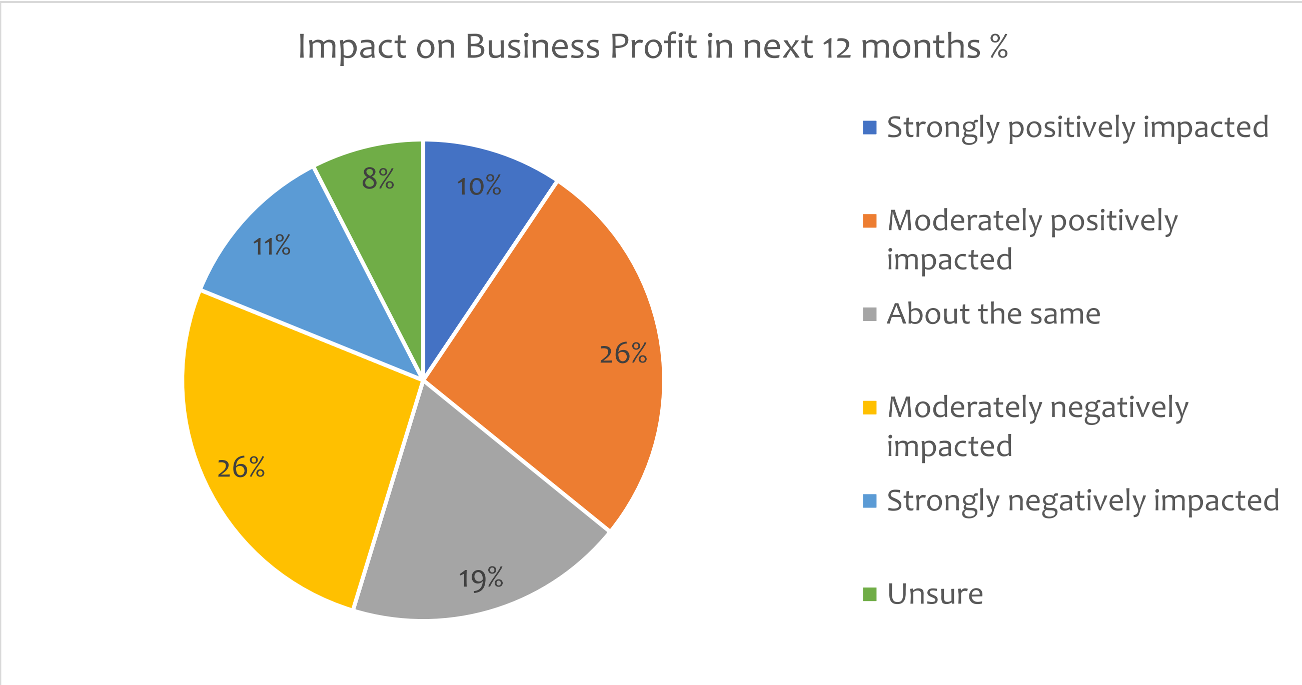
As the tables and charts below demonstrate, different businesses were impacted in different ways. Small amount (8%) of businesses who responded said that the year of pandemic before the December 2021 had a positive impact on profits with 11% reporting this was "strongly positive", resulting in only one fifth of businesses highlighting that pandemic had a generally positive impact on profitability. In contrast, 26% of businesses reported that profits were negatively impacted with 43% saying the reduction was "strongly negative" which indicates that more than a half of business' trading was negatively affected by the pandemic.

When asked about projected impact on business profits over the next 12 months from March 2022 when compared to pre-pandemic trading, 26% are positive about potential impact and 10% claiming to be "strongly positive" that business profits are likely to be better than those before the pandemic. 26% of businesses expect a moderately negative impact on profit compared to pre-pandemic levels, and 11% see this impact as strongly negative.



Compared to pre-pandemic levels, over the 12 months to December 2021, how was your business' profit impacted by COVID-19 and other issues?	**National Large Towns %**	**Responses no.**	**Responses %**
Strongly positively impacted	-	6	11%
Moderately positively impacted	29%	4	8%
Not affected	28%	3	6%
Moderately negatively impacted	42%	14	26%
Strongly negatively impacted	-	23	43%
Not appropriate	-	3	6%

Over the 12 months from March 2022, how do you think your business' profits will be compared to 'normal', pre-pandemic trading?	National Large Towns %	Responses no.	Responses %
Strongly positively impacted	-	5	10%
Moderately positively impacted	37%	14	26%
Not affected	38%	10	19%
Moderately negatively impacted	28%	14	26%
Strongly negatively impacted	-	6	11%
Unsure	-	4	8%



KPI 8: Town Centre User's Survey

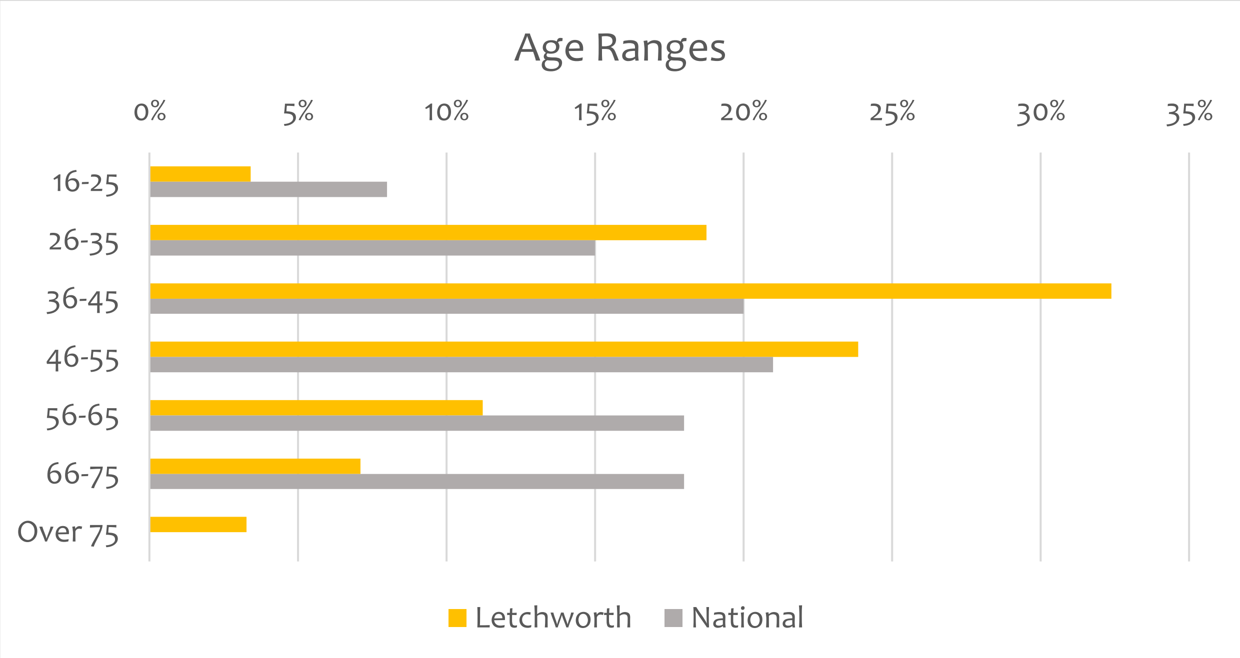
The aim of the town centre users' survey is to establish how a town is seen by those people who use it. It provides a wealth of data from a range of different types of local and visiting town centre users.

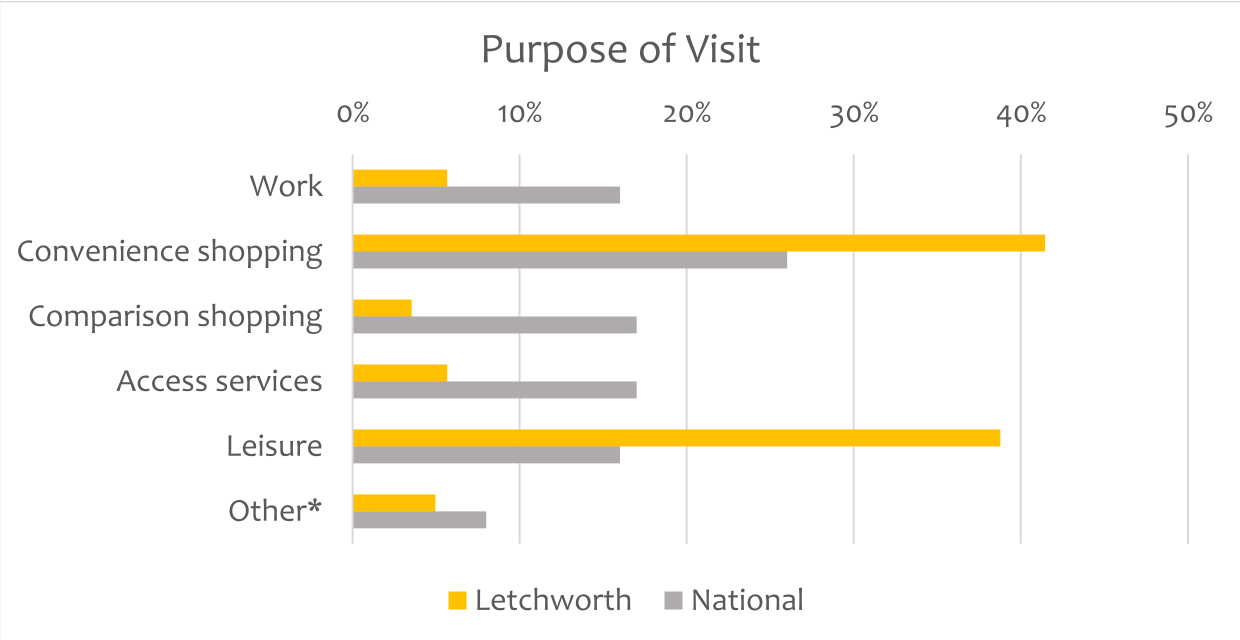
Characteristics of customers surveyed

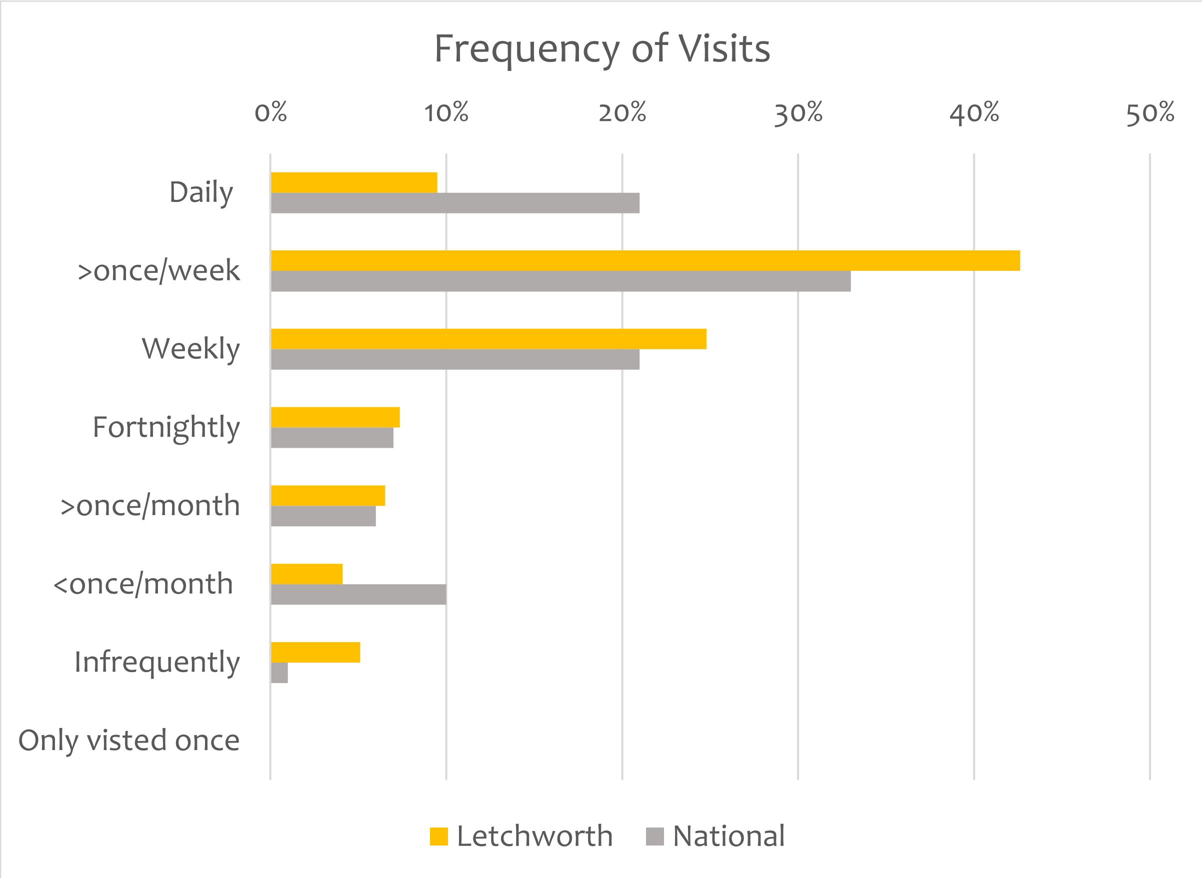
A large sample of 707 Letchworth town centre users were surveyed online through social media using the help of local community partners. Nearly three-quarters (72%) of respondents were female, which is a higher proportion compared to surveys conducted in towns nationally (64%). There was healthy participation amongst all age groups, with 36-45s providing the highest number of responses.

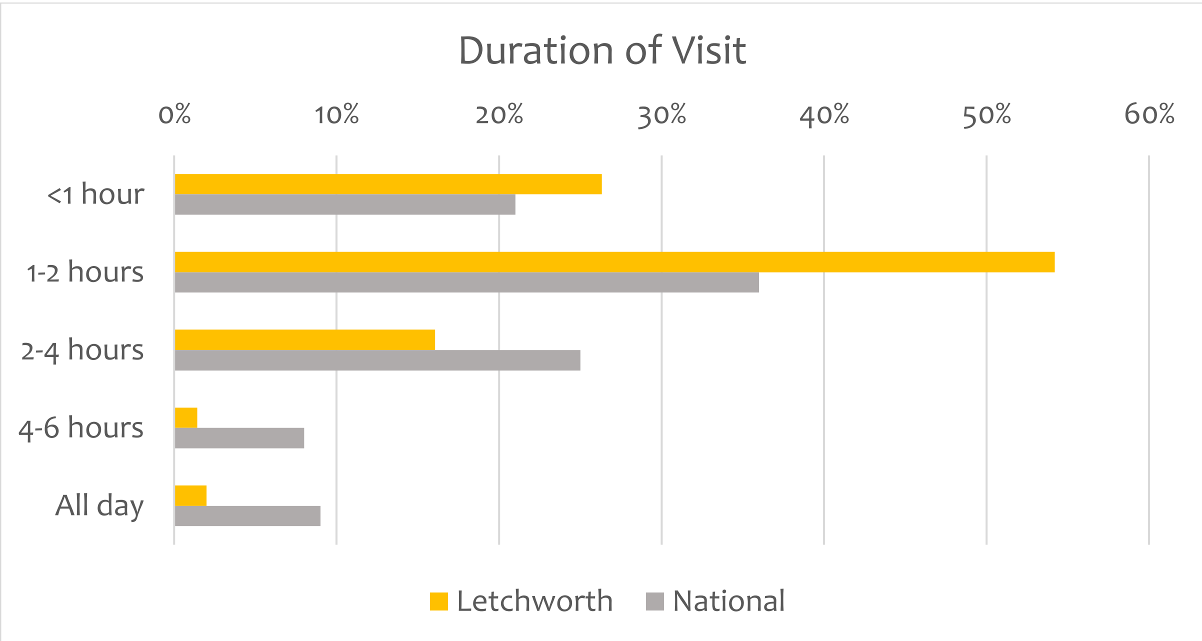
Customer background and nature of visit to town centre	**National Large Towns %**	**Letchworth (number)**	**Letchworth %**
Gender			
Male	36%	188	27%
Female	64%	507	72%
Other	-	0	0%
Prefer not to say	-	11	2%
Age			
16-25	8%	24	3%
26-35	15%	132	19%
36-45	20%	228	32%
46-55	21%	168	24%
56-65	18%	79	11%
66-75	18%	50	7%
Over 75	-	23	3%
What is the main purpose of a typical visit to the town centre?			
Work	16%	40	6%
Convenience shopping	26%	293	41%
Comparison shopping	17%	25	4%
Access services	17%	40	6%
Leisure	16%	274	39%
Other	8%	35	5%

It is evident from the responses that the majority of customers surveyed (41%) typically visit Letchworth for everyday convenience shopping and everyday services such as food shopping or newsagents. The second most popular purpose of a visit (39%) is for leisure and likely to include socialising, activities as well as visiting many pubs and cafes located in the town centre. Comments listed as 'other' mostly included a blend of all the included activities, exercising, use of outdoor spaces, specialised shopping and commute. Despite the number of comparison retailers in the town centre, only 4% of respondents said that such shopping for fashion, gifts and household goods was the main purpose of their visits, however some of such purposes likely to have fallen within the comparison shopping responses.






Frequency of Visits
0%
10%
20%
30%
40%
50%
Daily
>once/week
Weekly
Fortnightly
>once/month
<once/month
Infrequently
Only visted once
Letchworth
National


Duration of Visit
0%
10%
20%
30%
40%
50%
60%
<1 hour
1-2 hours
2-4 hours
4-6 hours
All day
Letchworth
National

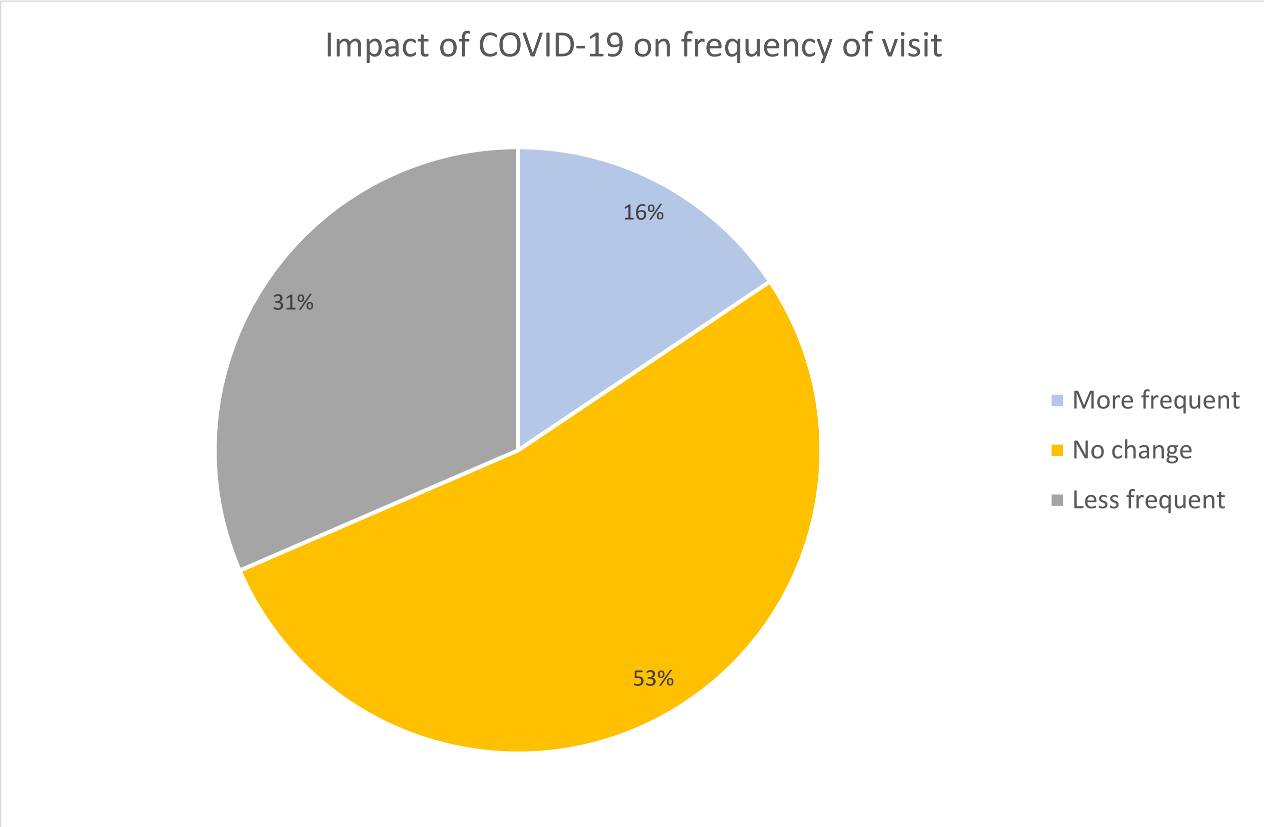
Analysis of the 707 responses received from town centre users reveals that significant proportion (53%) of town centre users have decreased their frequency of visits to Letchworth town centre due to the COVID-19 pandemic. Interestingly, 16% of users said that they have been visiting the town centre more frequently, and 31% have not changed how often they visit.

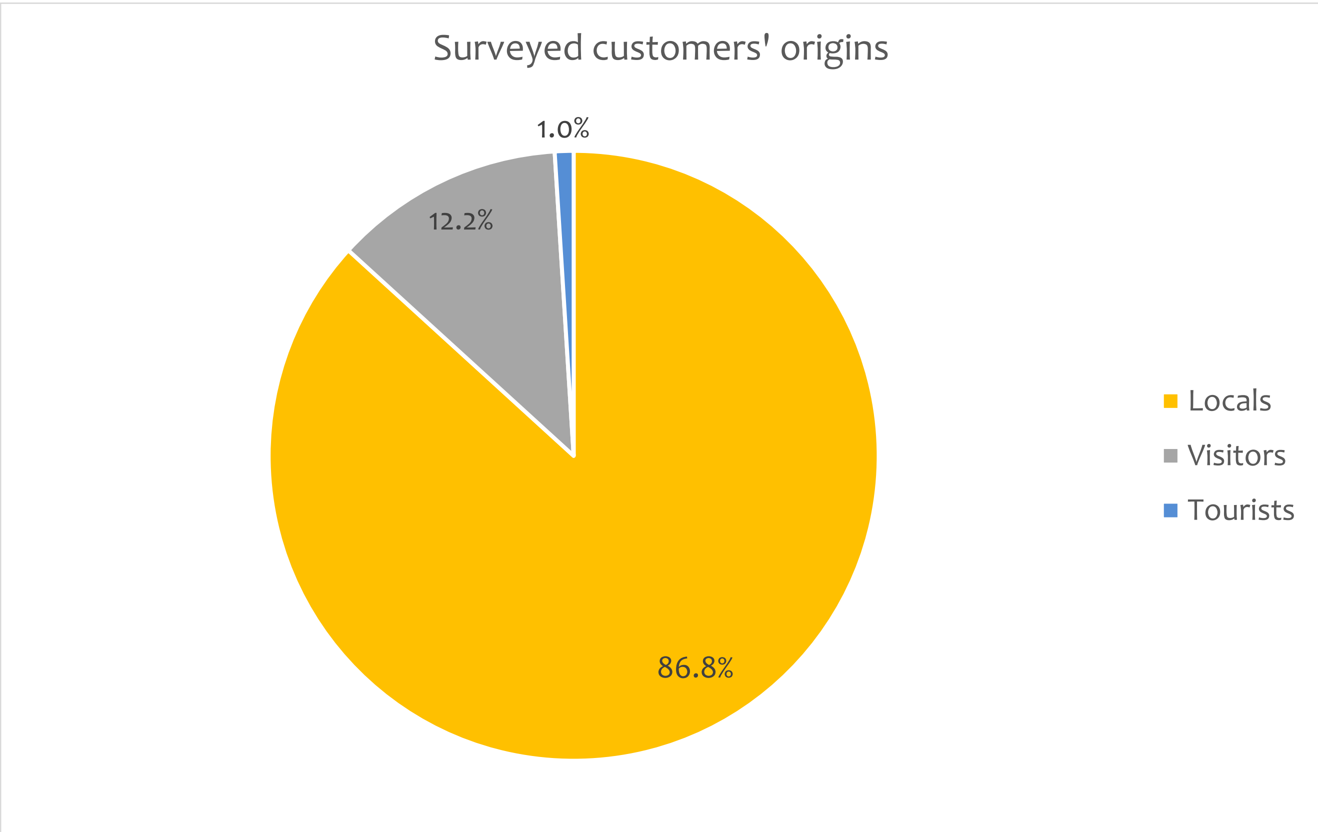
When asked how often users visit town centre now with the pandemic restrictions being lifted, 43% of users responded that are visiting town centre more than once a week, 25% making their visits weekly and only 9% responded that are visiting Letchworth daily. 7% of users are visiting Letchworth fortnightly and another 4% are infrequent users who visit Letchworth once a month or less. 5% of respondents, have been to Letchworth only once.

Answering question on duration of their visit, more than a half of users (56%) said that are spending one to two hours in town, while another quarter (26%) of shoppers are in and out of the town centre within one hour. A further 16% dwell up to 4 hours, 1% are spending more than 4 hours and 2% are staying in the town centre for the whole day.

How do you think the frequency of your visits to the town centre will have changed because of the COVID-19 pandemic?	**Letchworth (number)**	**Letchworth %**
More frequent	110	16%
No change	373	53%
Less frequent	222	31%

Frequency and duration of visits to town centre	**National Large Towns %**	**Letchworth (number)**	**Letchworth %**
How often do you currently visit town centre?			
Daily	21%	67	9%
>once/week	33%	301	43%
Weekly	21%	175	25%
Fortnightly	7%	52	7%
>once/month	6%	46	7%
<once/month	10%	29	4%
First visit	1%	36	5%
Infrequently	-	0	0%
How long do you normally stay during a visit to the town centre?			
<1 hour	21%	185	26%
1-2 hours	36%	381	54%
2-4 hours	25%	113	16%
4-6 hours	8%	10	1%
All day	9%	14	2%
Other	-	-	-


Impact of COVID-19 on frequency of visit
16%
31%
53%
More frequent
No change
Less frequent


Surveyed customers' origins
1.0%
12.2%
86.8%
Locals
Visitors
Tourists

Customers' origins

The customers' origin element of the town centre users' survey tracks the general area that town centre visitors originate from. The data can be used to target local marketing or promotional literature. It can also be used as evidence of the success of such campaigns by gauging the penetration into the population.

The postcodes gathered in the survey are split into 3 categories to be able to compare with other towns. The categories are:

- Locals: those who live within a Post Code covering the town
- Visitors: those who live within a Post Code less than a 30 minute drive away
- Tourists: those who live within a Post Code further than a 30 minute drive away

	National Large Towns %	Letchworth (number)	Letchworth %
Locals	57%	539	87%
Visitors	27%	76	12%
Tourists	16%	3	1%

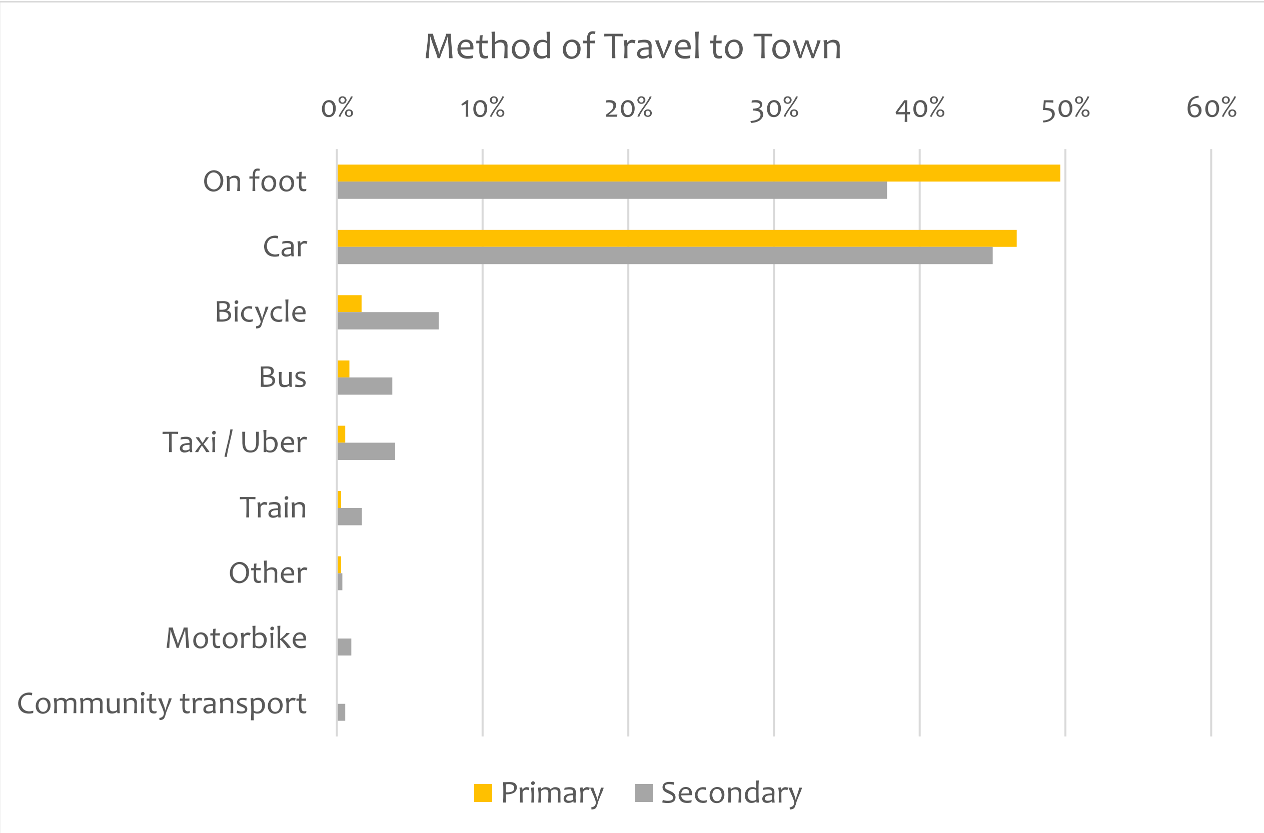
The figures for shoppers' origin for Letchworth from this survey indicate that currently 87% of town centre users live locally and that 12% visit from within 30-minute drive distance. A significant proportion of these visitors live in nearby towns like Ware, Stevenage, Hitchin, Baldock, Arlesey and Royston. Comparing these numbers to the national data where local users form only slightly more than a half of the total number, it can be noted that Letchworth predominantly focuses on meeting needs of local residents. Very small proportion of responses across tourists identify that even if attracting some visitors from further away, wider promotion of the town centre can be improved. Despite the dominance of local users, some presence of visitors and tourists suggests that the balance must be struck between addressing local issues and improving shopping, hospitality, and leisure offer of the town centre to accommodate needs of both groups.

Travel to town

As part of the Letchworth survey, town centre users were asked about their preferred primary and secondary methods of travelling into town.

The responses on travel to town show that on foot (50%) and car (47%) are the preferred primary methods of travel to town. This is unlike trends for large towns nationally, were commute via car dominates on foot.

	National Large Towns %	Primary (number)	Primary %	Secondary (number)	Secondary %
How do you currently travel into the town centre? (Please choose one main option and one secondary option that you might also sometimes use)					
On foot	28%	350	50%	199	38%
Bicycle	2%	12	2%	37	7%
Motorbike	0%	0	0%	3	1%
Car	58%	329	47%	236	45%
Bus	9%	6	1%	19	4%
Train	-	2	0%	9	2%
Taxi / Uber	1%	4	1%	20	4%
Community transport	-	0	0%	2	0%
Other	2%	2	0.3%	2	0.4%

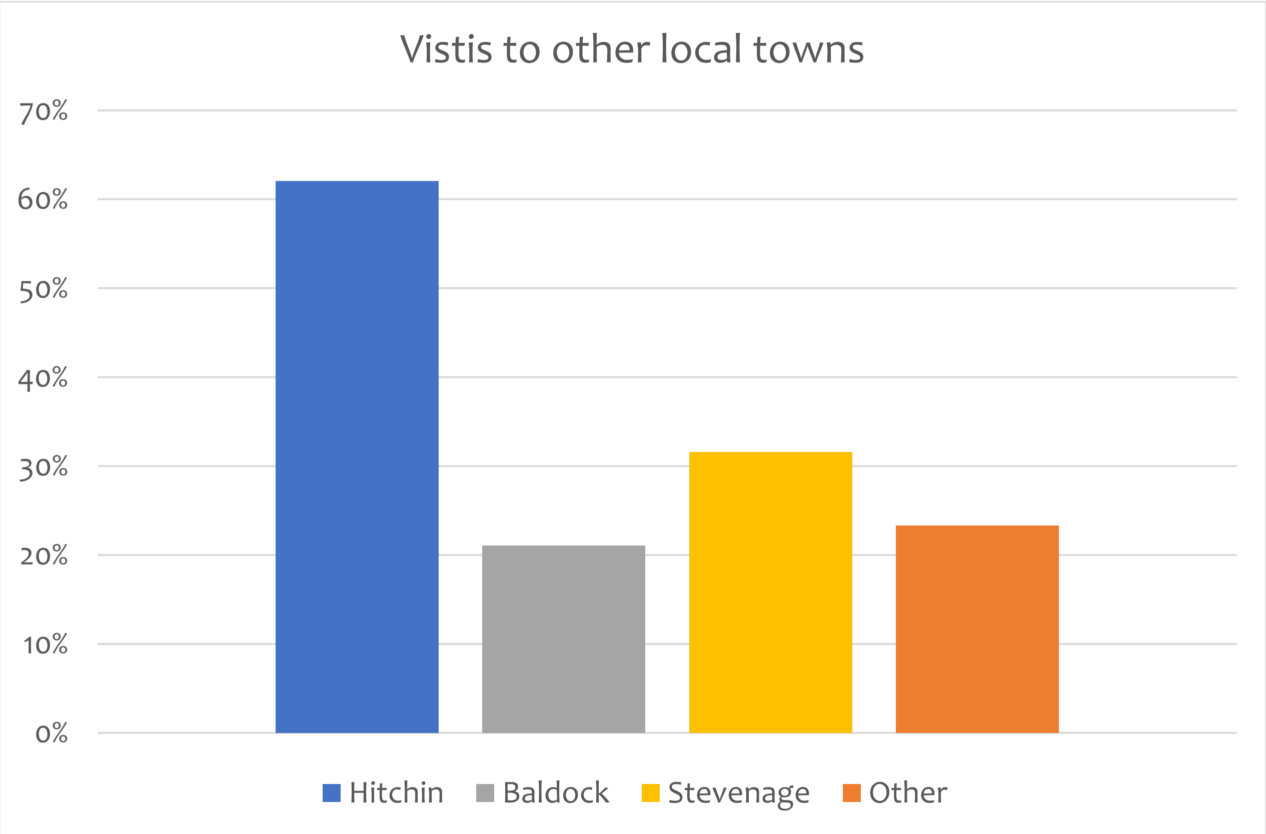


Travelling to town by car (45%) and on foot (38%) are also the most popular secondary choices, followed by cycling (7%), bus (4%), taxi (4%) and train (2%). This indicates that most town centre users are visiting either by foot or car, while the bus, bicycle and taxi are the most convenient alternative options. Considering high proportion of local visitors, high number of users who prefer walking suggests that Letchworth town centre is well connected to nearby residential areas and provides its visitors with convenient walking routes.

Surrounding towns

As part of the survey, users were asked which other local towns they visit regularly, making at least one trip per month. Hitchin appeared to be visited by 62% of respondents, Stevenage is visited by 32% and Baldock by 21%. Within the category of 'other, (23%), Biggleswade and Welwyn appeared as the most popular options, with significant number of respondents saying that they are not visiting any of the local towns at all.

	Visitors (number)	Visitors %
Hitchin	407	62%
Baldock	138	21%
Stevenage	207	32%
Other (please specify)	153	23%



Positive or negative aspects of the town centre environment	National Large Towns %			Letchworth %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Physical appearance	38%	19%	43%	66%	22%	12%
Built heritage	-	-	-	64%	29%	7%
Public spaces				74%	20%	7%
Cleanliness	39%	26%	35%	75%	19%	6%
Pedestrian access	62%	29%	9%	84%	11%	5%
Convenience	66%	29%	5%	83%	13%	3%
Road links	54%	28%	18%	67%	29%	4%
Traffic	35%	30%	35%	46%	40%	14%
Public transport	44%	38%	18%	24%	62%	14%
On-street parking	31%	34%	35%	37%	36%	27%
Off-street parking				50%	34%	15%
Walking or cycling routes	32%	25%	43%	56%	33%	11%
Outdoor seating for hospitality				70%	20%	11%
Leisure & cultural facilities	23%	56%	21%	55%	28%	17%
Events/activities	25%	51%	24%	51%	34%	15%
Online information & promotion				37%	47%	16%
Safety	33%	56%	11%	59%	33%	8%

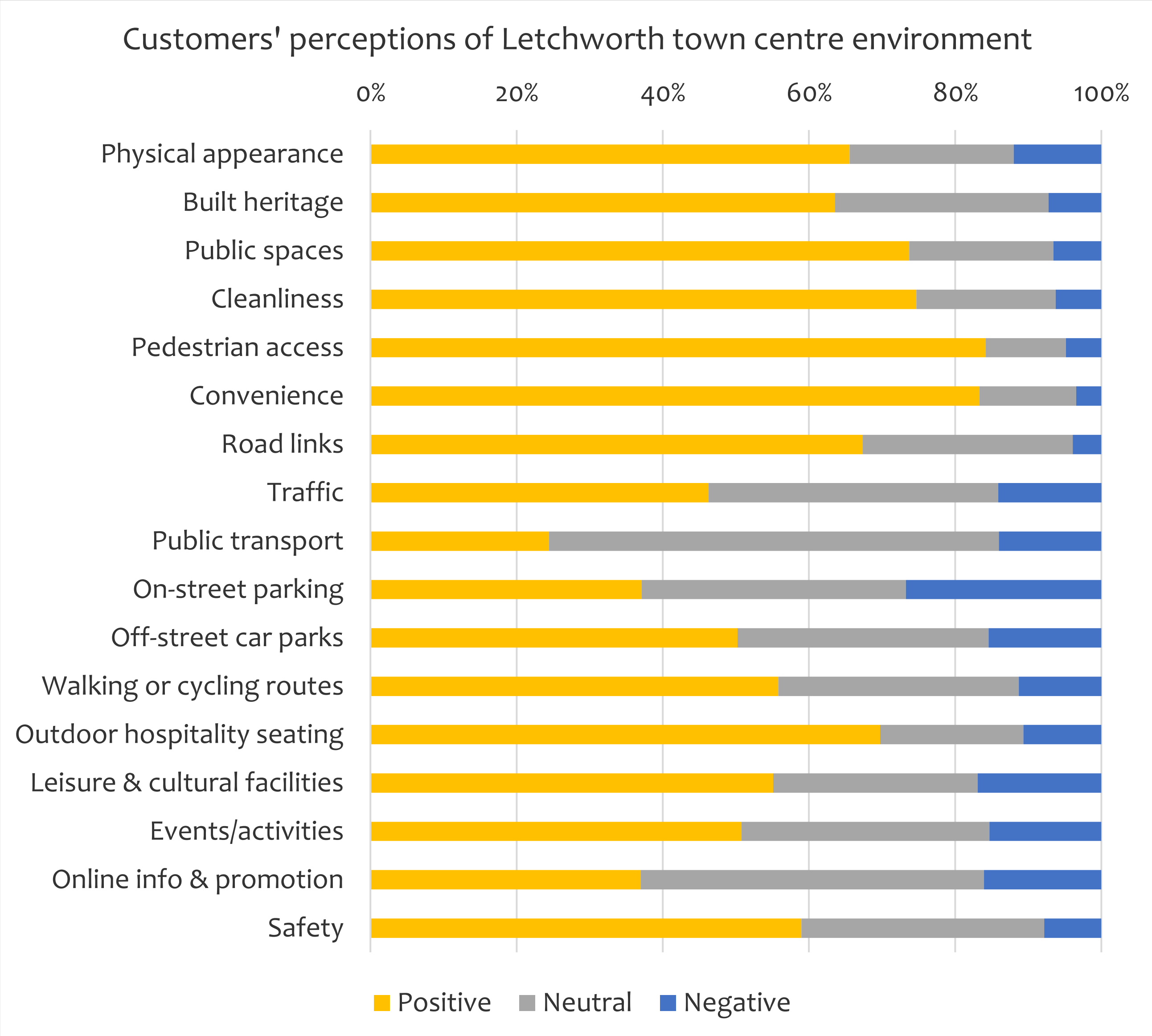
Customers' perceptions of the town centre

Customers were asked to indicate what are the positive, neutral, or negative aspects of the current condition of the town centre environment for a list of town centre qualities.

Customers were very positive about pedestrian access (84%), convenience (83%), cleanliness (75%), public spaces (74%) and outdoor seating for hospitality (70%). They were also positive about road links (67%), physical appearance (66%) and built heritage (64%). Users also valued highly safety (59%), walking and cycling routes (56%), leisure and cultural facilities (55%) and provision of events and activities (51%).

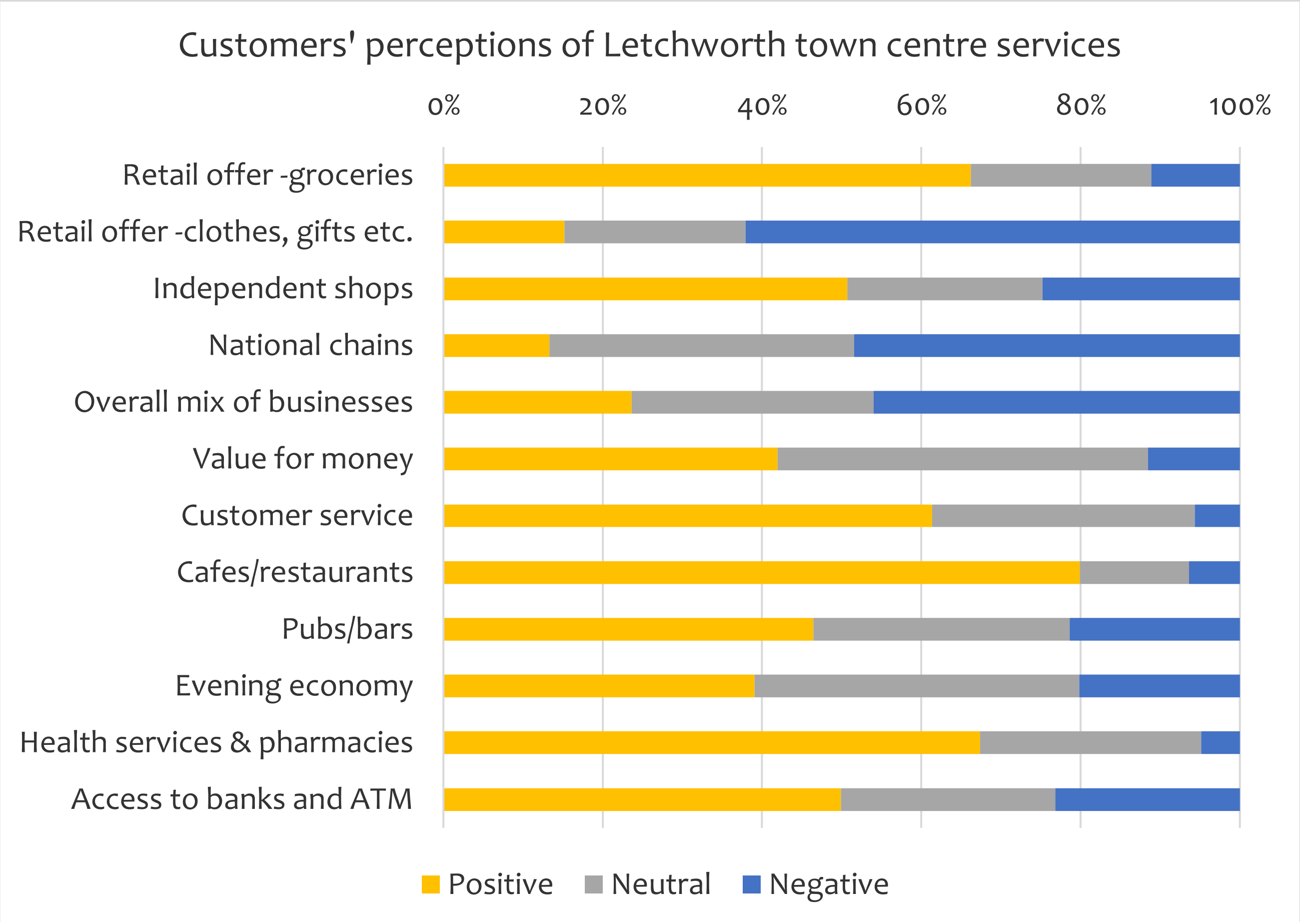
Majority of town centre users felt indifferent about public transport (62%), online information and promotion (47%) and traffic (40%).

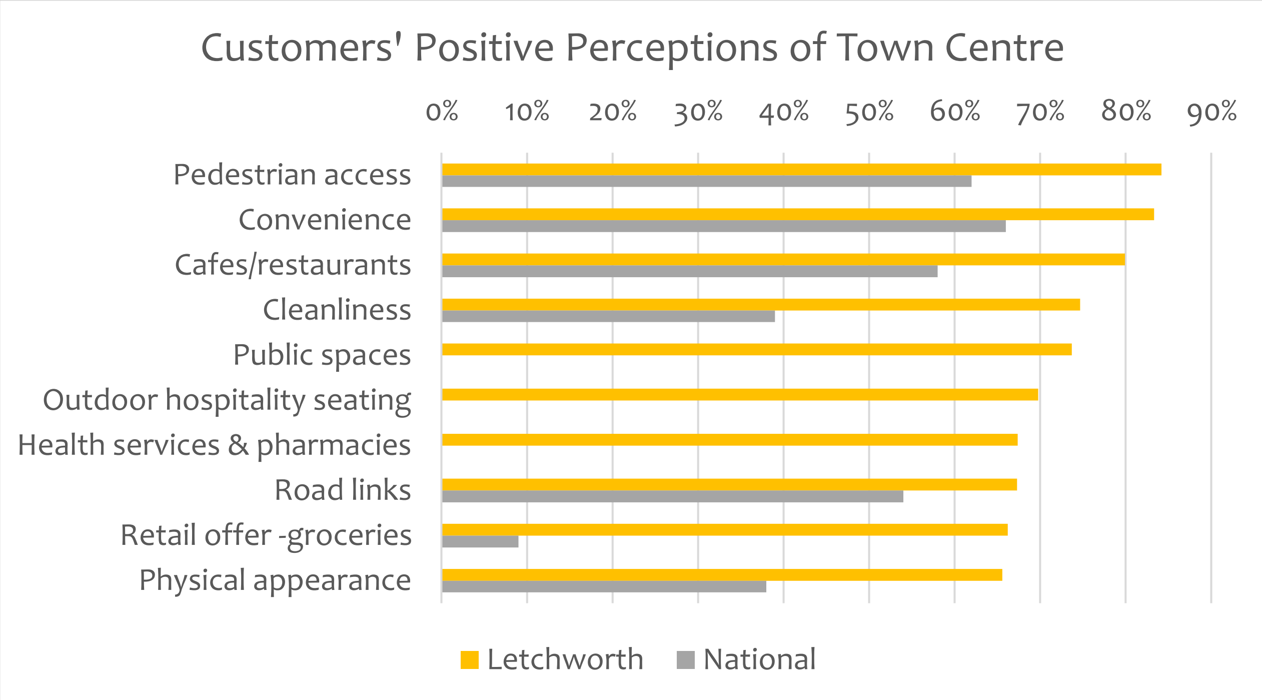
In terms of negative aspects of Letchworth's town centre's environment, on-street parking (27%) received the higher number of responses, followed by leisure and cultural facilities (17%), online promotion (16%), off-street parking (15%) and events and activities (15%). Generally, responses appeared to be more positive than those expressed nationally, and with negative rating covering some town centre aspects, yet with much smaller proportion.

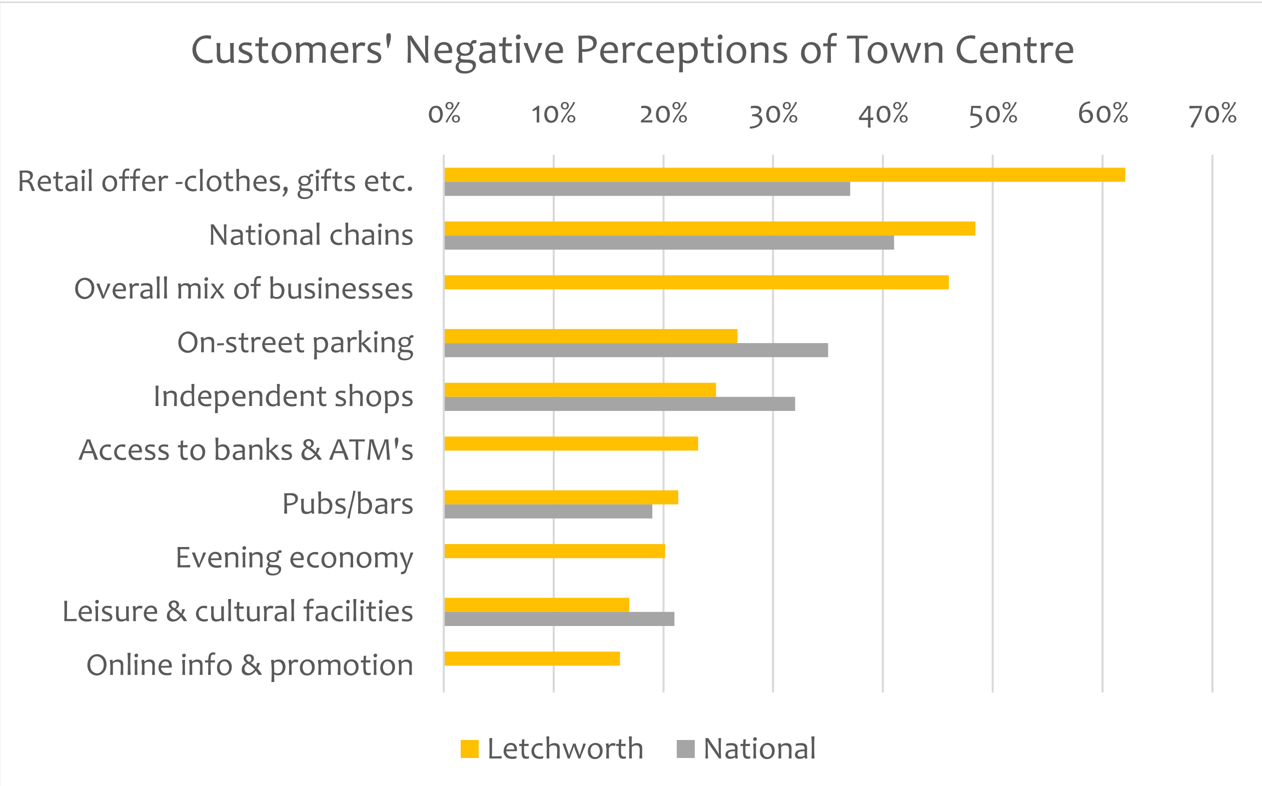


Subsequently, customers were asked to indicate what are the positives and negatives of the current provision of town centre services and businesses. Aspect that received by far the most positive response was provision of cafes and restaurants (80%). Customers were also positive about Letchworth's health services (67%), retail grocery offer (66%) and customer service (61%) and appreciated independent shops (51%), access to banks and ATM's (50%), pubs and bars (46%) and offer of value for money (42%).

Positive or negative aspects of the town centre services	National Large Towns %			Letchworth %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Retail offer -groceries	9%	44%	47%	66%	23%	11%
Retail offer -clothes, gifts etc.	10%	53%	37%	15%	23%	62%
Independent shops	49%	19%	32%	51%	24%	25%
National chains	22%	37%	41%	13%	38%	48%
Overall mix of businesses				24%	30%	46%
Value for money	51%	37%	12%	42%	47%	12%
Customer service	33%	57%	10%	61%	33%	6%
Cafes/restaurants	58%	30%	12%	80%	14%	6%
Pubs/bars	32%	49%	19%	46%	32%	21%
Evening economy				39%	41%	20%
Health services or pharmacists				67%	28%	5%
Access to banks and ATM				50%	27%	23%



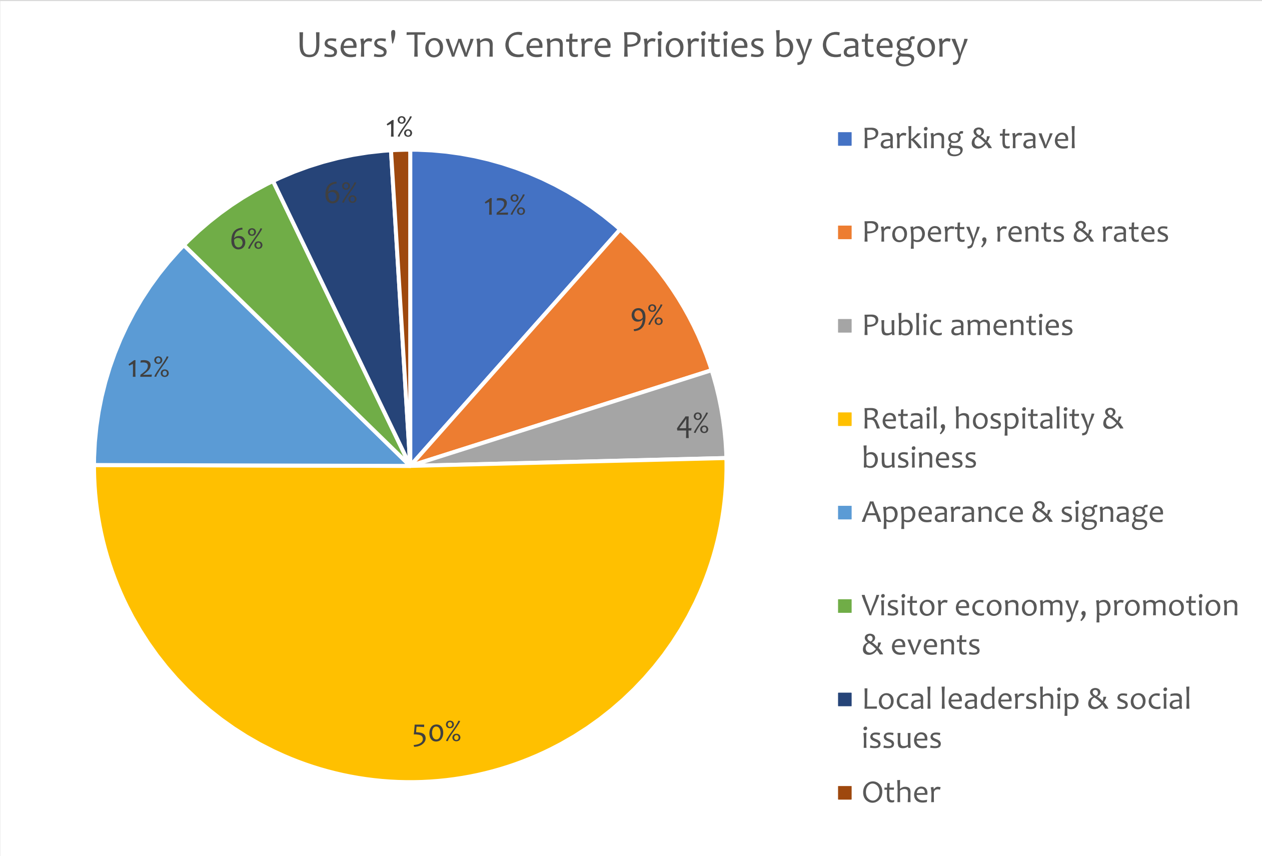




Charts above combine users' responses on town centre's environment and service provision and indicate that customers are the most positive about pedestrian access, convenience, cafes and restaurants, cleanliness and public spaces. The most negative aspects are retail offer of clothes, gifts and other comparison items, provision of national chains and overall mix of business. There is some dissatisfaction with on-street parking, accessibility of banks and ATM's and independent shops.

Customer suggestions to improve the town centre

When customers of Letchworth were asked what two things would improve the town centre, there was a high volume of comments generated. These were classified into broad themes and a more detailed breakdown of issues.



The theme receiving by far the most comments was the one related to the town's retail, hospitality & general business (574).

Within this theme, sentiments regarding the lack of retail diversity and sufficient business diversity (216) generated almost half of all comments received within this topic.

Other comments related to the same category indicated high priorities related to the fashion retail mix (119) with particular sentiments in relation to the lack of men fashion outlets, need for more independent businesses (83) and lack of key attractors, high street and chain retailers (44). There was a high number of comments (78) in relation to hospitality mix, with sentiments regarding lack of diversity in restaurant and bar provision.

Furthermore, there were requests for more regular or permanent market (23) and increased opening hours for existing businesses (11).

Themes on appearance and signage (139) and parking and travel (131) gathered similar number of comments. Within the first theme, comments were divided between appearance (28), maintenance of buildings and shopping centre in particular, greenspace (26) in terms of provision of greenery to reflect on the identity of the "garden city", public outdoor seating (22) and requests to retain outdoor seating for hospitality (22). Other sentiments appeared to be about cleanliness (7), provision of public toilets (7), improved disability access (5), provision of rain shelters and undercover areas (5), signage (4), and controversially to previous comments, requests to remove outdoor hospitality seating (6).

For parking and travel, majority of comments expressed wish for pedestrianisation of central areas (51), Leys Avenue in particular, on either permanent or weekend basis. Other comments covered space for improvement in parking management (31), parking costs (22), traffic management (13), improved cycling facilities (10) and public transport (4).

Within the property, rents and rates theme (96), two thirds of comments expressed concerns regarding empty properties within the town centre (65), followed by comments regarding rents and rates (31).

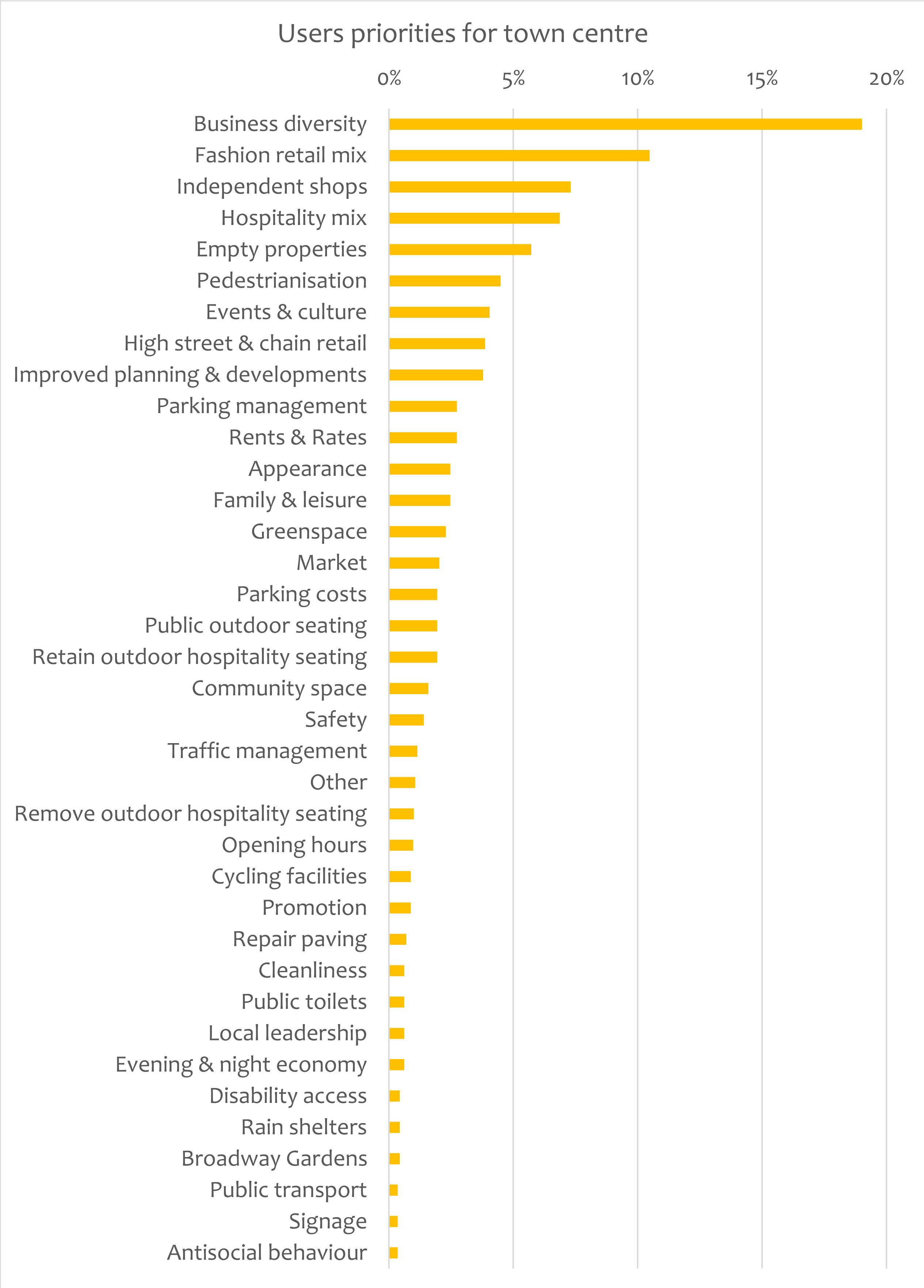
The local leadership and social issues theme (70) highlighted concerns regarding current planning and developments (43), pointing out that town can be improved through modernisation, change of uses, and more defined focal point. Other comments indicated concerns of safety (16), local leadership (7) and antisocial behaviour (4).

The visitor economy, promotion and events theme (63) received a significant number of comments expressing need to increase number of public events and festivals (46), improve promotion among visitors and locals (10) and expand evening and night economy (9).

Within public amenities theme (51), sentiments were related to improved provision of family and leisure activities (28), with number of comments indicating wish for better soft play area, playground, and other facilities to be attended by families with kids. Furthermore, need for diverse community space (18) appeared, with particular focus on meeting spaces for young groups and elderly residents. Broadway Gardens appeared in (5) comments as a space that could be utilised better for community events and purposes.

Finally comments that were not categorised in any of the themes above, included sentiments in regards of better provision of ATM's, Wi-Fi and phone signal, dog friendly places and drinking water fountain.

Below is a selection of five comments for issues that received 10 or more amongst over 1,100 responses received. The figures in brackets are a reminder of the total number of comments received for each issue.


Users priorities for town centre
0%
5%
10%
15%
20%
Business diversity
Fashion retail mix
Independent shops
Hospitality mix
Empty properties
Pedestrianisation
Events & culture
High street & chain retail
Improved planning & developments
Parking management
Rents & Rates
Appearance
Family & leisure
Greenspace
Market
Parking costs
Public outdoor seating
Retain outdoor hospitality seating
Community space
Safety
Traffic management
Other
Remove outdoor hospitality seating
Opening hours
Cycling facilities
Promotion
Repair paving
Cleanliness
Public toilets
Local leadership
Evening & night economy
Disability access
Rain shelters
Broadway Gardens
Public transport
Signage
Antisocial behaviour

Categories of Issue	Letchworth responses (no.)	Letchworth responses (%)
Retail, hospitality & business	1134	50.4%
Business diversity	215	19%
Fashion retail mix	120	10.6%
Independent shops	83	7.3%
Hospitality mix	76	6.7%
High street & chain retail	44	3.9%
Market	23	1.5%
Opening hours	11	1%
Appearance & signage	139	12.3%
Appearance	28	2.5%
Greenspace	25	2.2%
Public outdoor seating	22	1.9%
Retain outdoor hospitality seating	22	1.9%
Repair paving	8	0.7%
Public toilets	7	0.6%
Cleanliness	7	0.6%
Remove outdoor hospitality seating	6	0.5%
Disability access	5	0.4%
Rain shelters	5	0.4%
Signage	4	0.4%
Parking and travel	131	11.6%
Pedestrianisation	51	4.5%
Parking management	31	2.7%
Parking costs	22	1.9%
Traffic management	13	1.1%
Cycling facilities	10	0.9%
Public transport	4	0.4%
Property, rents & rates	97	8.6%
Empty properties	66	5.8%
Rents & Rates	31	2.7%

Local leadership and social issues	70	6.2%
Improved planning & developments	43	3.8%
Safety	16	1.4%
Local leadership	7	0.6%
Antisocial behaviour	4	0.4%
Visitor economy, promotion & events	63	5.6%
Events & culture	46	4.1%
Promotion	10	0.9%
Evening & night economy	7	0.6%
Public amenities	51	4.5%
Family & leisure	27	2.4%
Community space	19	1.7%
Broadway Gardens	5	0.7%
Other	11	1%

Business diversity (215)

- Less nail bars and restaurants
- A bigger range of diverse shops, such as more clothing shops, fresh food shops and different culture food stores such as West Indian.
- I love Letchworth but without Morrison's I would not even come into town anymore. When I said I'm spending £20 plus I mean I'm spending it in Morrison's. There is very little in town and for shopping and we go to Hitchin instead, I would rather shop in Letchworth
- Encourage more diversity of businesses rather than more of the same
- More variety of businesses

Fashion retail mix (120)

- Increased men's clothes shops
- Better choice of clothes shops for all ages
- Encourage more fashion stores
- We'd benefit from a nice boutique clothes shop that's aimed at people in their 30's. Rather not go to Hitchin or Cambridge every time I need some clothes.
- Clothes shops - you ever tried buying business clothes in town?!

Independent shops (82)

- More independent quality shops like David's
- Better retail offer - more independent shops and less low value shops

- Encourage more independent retailers- use empty shops for short-term pop-up stores
- Encourage more independent businesses and pop ups
- Better placing of businesses, should be known for its independent businesses

Hospitality mix (77)

- A wider variety of restaurant cuisines, it's mostly Italian & 2 Turkish
- More cafes serving proper hot lunch food, not just snacks
- Develop the town's cafe and bar culture, and more quality dining experiences so that it is an attractive place for entertainment
- Also benefit from a Bills or a Nando's or something like that. Love independents but 3 Italians is a lot. It's also not clear to me why Weatherspoon's has so many outdoor seats
- More restaurants (not another Italian)

Empty properties (65)

- Fill the empty shops - diversity please
- Use empty units for more productive things (e.g., put info updates, maps of traders, coming soon events etc there). Use as spaces to display arts, cinema listings, exhibitions, performances around town
- Allowing community groups to use empty shop premises
- Allow other uses or short-term contracts into existing shops
- Fill empty shops with good quality stores

Pedestrianisation (51)

- Pedestrianise Leys Ave, even just for parts of the day
- Pedestrianise Leys Avenue and Eastcheap to make it safer and more inviting for young families
- More pedestrianised roads where you can sit outside with the family, and not worry about cars speeding by
- More pedestrianised areas (some areas currently look like they are, but aren't)
- Pedestrianise Leys Avenue at the weekends.

Events & culture (46)

- More organised events all year round
- More pop-up events, foodie and family events to get people enjoying the town
- Better events, recent food event wasn't great
- More cultural events for all ages

- The Wynd could have pop up street vans with a canopy/fairy lights & live music (at the weekend), pop-up markets stalls, to appeal to all ages making it a vibrant place to go & people to shop in the wynd

Chain & high street retail (excl. Fashion) (44)

- Get some anchor tenant to draw more footfall
- Marks and Spencer
- More shops that aren't independent businesses so like a chain
- Better high street shops
- Better selection of national chains

Improved planning and developments (43)

- Invest in regeneration of the garden square shopping area
- Keep the identity of the Wynd and encourage a similar look and feel throughout the town
- Focus on relocating retail outlets to one main street to make it feel busier and more buzzy.
- Embrace Letchworth's unique quirky history to prevent the town centre being so like others
- The town lacks a focal point

Parking management (31)

- Add the extra car park (by Morrisons) to free parking at weekend
- Parking restrictions loosened to improve vitality and vibrancy of the centre. One hour is prohibitive for restaurants and other businesses such as barbers. Doesn't encourage people to make a day out at Letchworth
- Outdoor car park more like a gravel pit
- swap parking - free parking on rear car parks and pay and display along the main Street. this would reduce the amount of traffic that is just driving in case they find a free spot
- Stop the random kerbside parking outside of designed parking bays

Rents and rates (31)

- Reduce rents to encourage occupation of shops. Prioritizing not the service industry actual shops.
- Reduce business rates for shops
- Short term leases for independent small business at a rate they can afford. Why not have a vibrant, busy boutique feel as opposed to a depressing ghost town?
- Lower rent for new shops - and keep it reasonable
- Cheaper rent for small businesses

Appearance (28)

- Improve the appearance of the covered walkways at the top end of town
- Tidy up the buildings properly
- What is left of the beautiful buildings?
- Cosmetic improvements to 1970s feel of section housing Iceland, Superdrug etc
- Improve the look and shops in garden square and renovate it

Family and leisure (27)

- Encourage more activity businesses to the centre like yoga, a climbing wall, hands-on craft cafes etc
- More things to do/places for children/families
- Soft play centre or somewhere to take the kids
- More safe outdoor play areas for children close to the shops
- More "activity" places, i.e., bowling, mini golf

Greenspace (25)

- More greenery plants trees
- Get rid of paved town centre areas, re-introduce green spaces and trees. This is a garden city!
- More greenery. You'd never know from the town centre that we live in a garden city.
- Lift concrete in some areas to plant more trees
- Bring back trees instead of strange masonry objects

Market (23)

- More markets and use of outdoor space
- Better /increased markets / food market events
- Permanent indoor market
- A proper weekly market
- More frequent market. Once a month is easy to miss and with that, hard to support

Public outdoor seating (22)

- Increased/improved seating for elderly and disabled shoppers
- Retain and encourage outdoor seating
- More benches on the walk between Highfield and town centre, to rest when carrying back shopping
- Keep the outside seating areas as they make it feel more buzzy
- More outdoor seating in the summer

Retain outdoor hospitality seating (22)

- Continue with cafe/restaurant outdoor seating
- Encourage people into pavement cafe type culture with live street music etc like in Bath
- encourage pavement use for business as creates a nice feel.
- Keep the outdoor seating areas for Café/restaurant/bars that were opened over Covid
- More cafes with outside seating

Community space (19)

- A youth club type of place for youngsters to hang out & access health & advice services
- A place for teens between 13-17 to hang out and make new friends
- Bring youth centres back or a safe space for children to go. Since a lot of people are about to be put into absolute poverty, I think it's necessary for children to have a place away from home to go for free where they can learn/stay out of trouble/get help for any mental health issues and generally socialise in a safe space outside of school times.
- Establish a community hub e.g., Library/ post office/ Letchworth Museum/space to promote community groups / sports clubs and facilities available/free meeting places etc. all incorporated into the Broadway umbrella - and all in the town centre! Too ambitious?!
- A community, drop-in place open days/evenings for lonely, homeless to socialise and have access to recreational facilities

Safety (16)

- Make it safer - more visible policing
- More action on vandalism/ public safety
- more police
- More security visible at the train station
- Make station area safer at night

Traffic management (13)

- Traffic system awful
- Speed bumps or other to reduce cars speed
- Slower cars driving down the middle
- Less cafes, bars, restaurants, charity shops, change the traffic system
- Less traffic on Eastcheap

Opening hours (11)

- More places open during the week and evenings

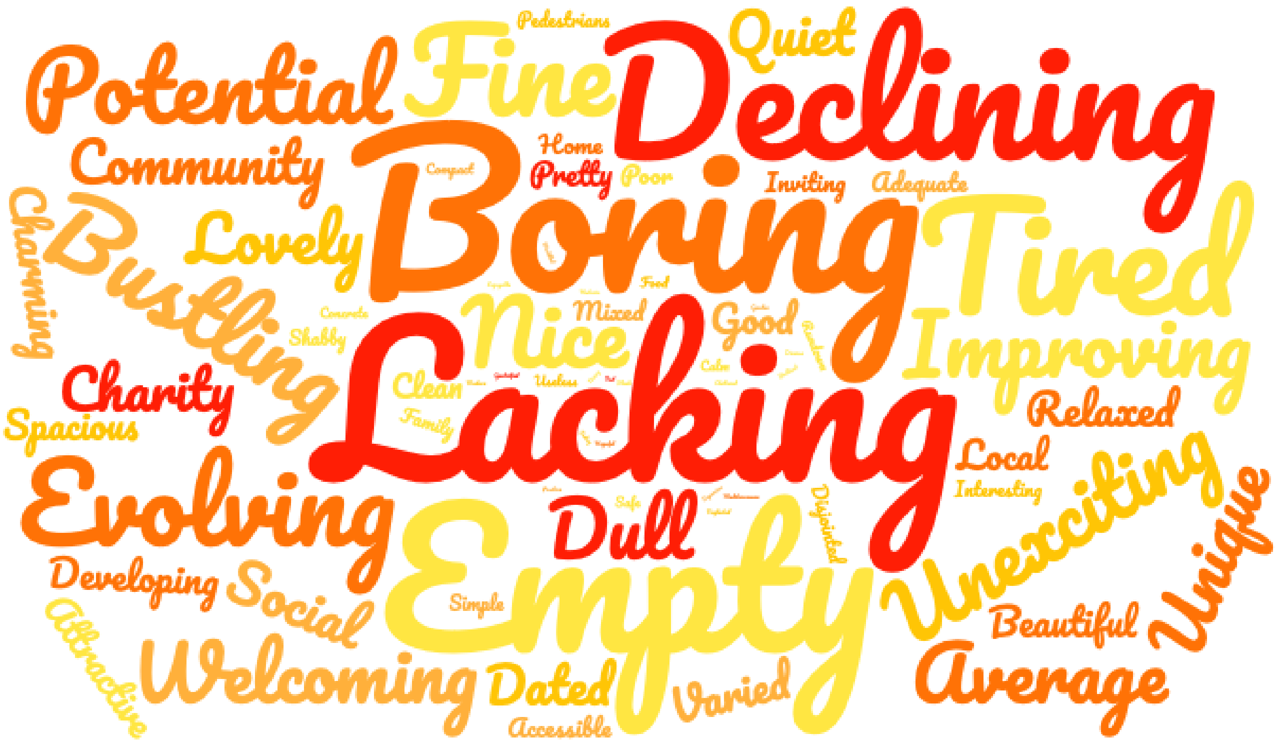
- More evening opening
- Longer opening hours for shops
- longer opening hours of remaining retail shops
- Late night shopping once a week

What word would you use to sum-up the town centre?

The word cloud below gives an indication of the most popular words used by town centre users to sum-up Letchworth.

Such a word cloud, whilst only indicative, is useful in understanding how the town centre is perceived by current users who are familiar with it. It gives a visual representation of sentiments and can be helpful in determining how the town can be honestly promoted to potential new users in a way that creates achievable expectations. Many of the most prominent words used for Letchworth negative, such as declining, boring, lacking, empty, tired and unexciting. This highlight user's dissatisfaction with provision of services. On the contrary, positive sentiments are expressed through the words such as potential, evolving, unique, welcoming, improving and bustling.

This word cloud presents a picture where users of Letchworth town centre are unhappy with the present offer, however, appreciate the uniqueness and ambience of the town and can see a potential for improvement. It will be informative to see how perceptions change as work is undertaken to revitalize Letchworth.



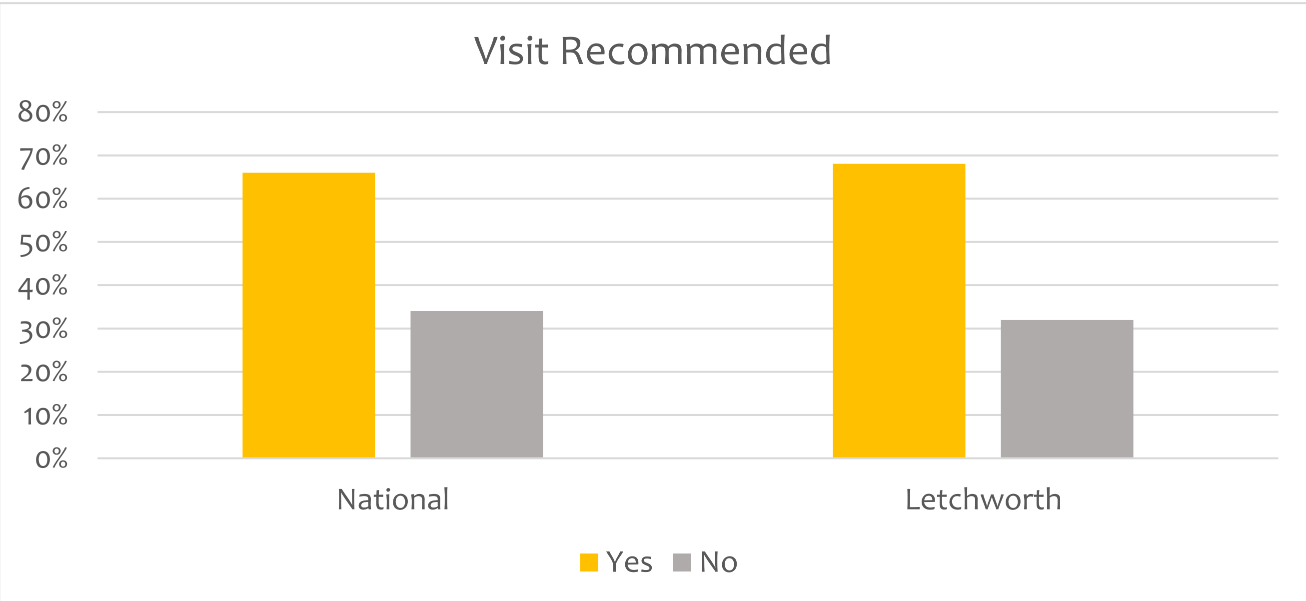
How has your experience of the town centre changed?

When asked how their experience of Letchworth town centre had changed in recent years, 26% of town users said it had improved and further 26% stated that it had changed in a mixture of good and bad ways followed by 17% saying that the experience has remained the same. While 29% of respondents said that their experience had worsened, this is a significantly smaller proportion than that of the national response. This indicates that there are opportunities and space for improvement to support this already generally positive opinion about the town.

Recommending a town centre visit

When users were asked if they would recommend a visit to Letchworth town centre, 422 out of 620 of users said yes which indicates that more than three quarters (68%) of users are indicating town centre as valuable experience for external visitors. Such response is representative and even slightly higher of the one expressed nationally (66%), showing that the town centre is appreciated by local users.

	National Large Towns %	Letchworth (number)	Letchworth %
How has your experience of the town centre changed in recent years?			
Improved	17%	163	26%
Changed -good & bad	18%	161	26%
Stayed the same	18%	107	17%
Worsened	45%	183	29%
Not appropriate	2%	12	2%
Would you recommend a visit to the town centre?			
Yes	66%	422	68%
No	34%	198	32%



KPI 9: Digital Development

As part of this baseline survey of the town centre, an initial 'digital diagnosis' was undertaken to understand development challenges and priorities.

The diagnostic approach taken draws on the findings of Digital High Street 2020 Report and Digital High Street Index. This gives an appropriate framework for a broad perspective and to initially provide indicative and comparable information to help determine more in-depth research needs.

Digital Business Skills and Infrastructure

As an adjunct to the business survey, preliminary questions were asked using a simple scoring system, in order to assess the current level of digital take-up and the priority given to its different aspects:

What priority does your business currently give to:

a. Creation and management of business web site
b. Regular use of social media to promote business and engage with customers, e.g. Facebook, Twitter, Instagram
c. Generation and provision of on-line sales
d. Collection and analysis of customer data to help target marketing

A second question was asked about the priority for investment in digital infrastructure:

How important are the following to the future operation of your business?

a. Fast broadband connection
b. Digital phone network coverage
c. Town centre Wi-Fi coverage

Customers' Digital Engagement

In the town centre users' survey, a corresponding set of questions was asked to give an indicative understanding of the level of digital uptake by customers and how they have engaged digitally as part of their visit and their strength of feeling around infrastructure provision:

As part of your visits to the town, how useful do you find:

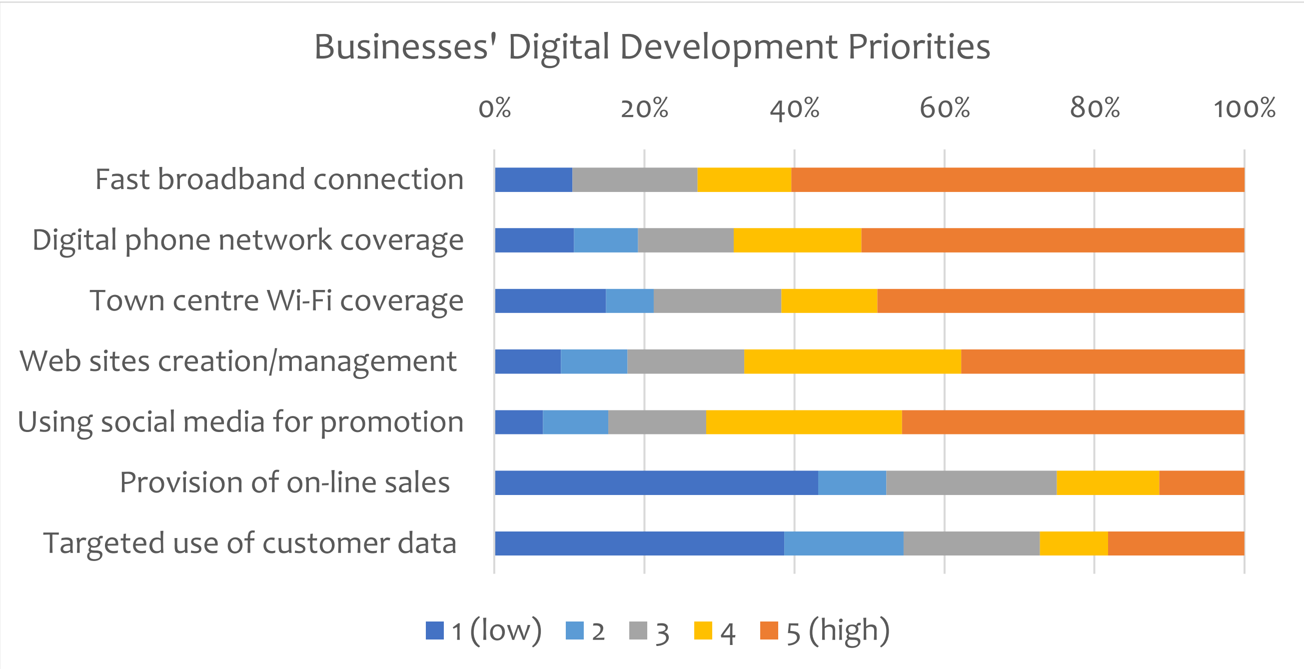
a. Web sites about the town or businesses to help plan your visit in advance
b. Insights through social media about businesses, products, places to eat, things to do
c. 'Click and collect' or the ability to browse products as part of your visit
d. Updates from businesses about special offers, things to-do etc.
e. Digital phone network coverage
f. Town centre Wi-Fi coverage

Analysis

Businesses

The table and charts below show the current priority given by businesses to the take-up of digital skills and the priority given to town-wide investment in digital infrastructure. The data is presented as the per centage of businesses given to the different levels of priority between 1 (low) and 5 (high). A weighted average gives a single figure performance indicator that can be compared with other places.

Businesses' digital priorities	**No. of responses**	**1**	**2**	**3**	**4**	**5**	**Letchworth average**	**National average**
Fast broadband connection	48	10%	0%	17%	13%	60%	4.01	3.95
Digital phone network coverage	47	11%	9%	13%	17%	51%	3.71	3.67
Town centre Wi-Fi coverage	47	15%	6%	17%	13%	49%	3.35	3.6
Web sites creation/management	45	9%	9%	16%	29%	38%	3.45	2.91
Using social media for promotion	46	7%	9%	13%	26%	46%	3.95	3.24
Provision of on-line sales	44	43%	9%	23%	14%	11%	2.82	2.25
Targeted use of customer data	44	39%	16%	18%	9%	18%	2.81	2.35

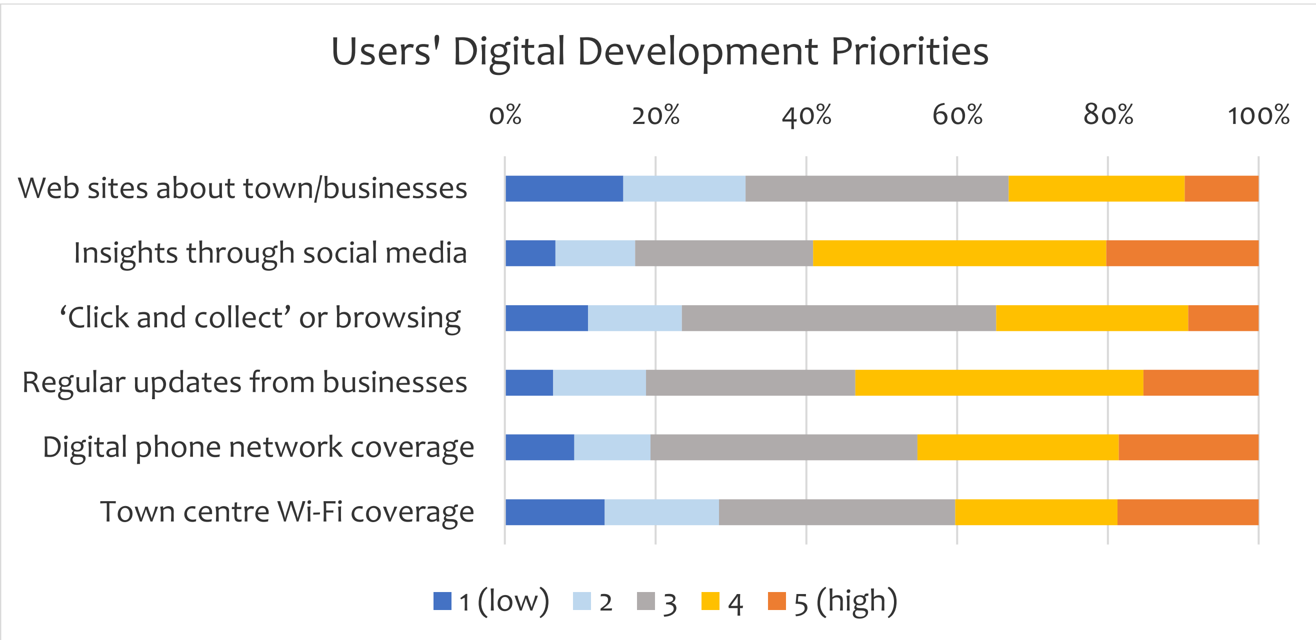


For businesses, fast broadband connection across the town centre has received the highest total number of priority and high priority responses (73% combined) followed by highly prioritised use of social media and online promotion (72%). Further, businesses prioritised website management (67%) and Wi-Fi coverage (62%). Provision of on-line sales and targeted use of customer data has received lower priority, indicating Letchworth's business focus on in shop sales.

Town centre users

The tables and charts below give the corresponding priorities for town centre users surveys for the use of businesses' digital services and the convenience of town-wide digital infrastructure.

Users' digital priorities	**No. of responses**	**1**	**2**	**3**	**4**	**5**	**Letchworth average**	**National average**
Web sites about town/businesses	642	16%	16%	35%	23%	10%	2.95	3.75
Insights through social media	643	7%	11%	24%	39%	20%	3.55	3.89
'Click and collect' or browsing	643	11%	12%	42%	26%	9%	3.1	3.09
Regular updates from businesses	641	6%	12%	28%	38%	15%	3.44	2.98
Digital phone network coverage	641	9%	10%	35%	27%	19%	3.35	3.59
Town centre Wi-Fi coverage	641	13%	15%	31%	22%	19%	3.17	3.11



Use of social media and insights about businesses, products, places to eat, things to do (59%) received the highest response as priority or high priority amongst digital development options amongst town centre's customers. This is followed by regular updates from businesses about special offers and things to do (53%), digital phone network coverage (46%) and town centre Wi-Fi coverage (41%). This indicates significance of online promotion and updates across customers' preferences. Click and collect services as well as use of web sites about town centre and its businesses received slightly lower high priority responses, with the website browsing appearing as significantly lowest with only 33% of customers marking it as a priority.

Local Leadership: Creating a Forward Framework

For a partnership to evolve in its effectiveness, it is important to plan for constant progress through regular review and writing things down! This can be achieved by annually reviewing the checklist and updating a 'Forward Framework' comprising an over-arching strategy and two component plans:

Business planning: Partnerships & people

Revitalising a town centre is a complex and long-term venture and experience shows that it requires resources and leadership that should not be left to chance.

The form of an organisation refers to its set-up, structure, governance, partnerships and legal status. The form of a partnership should follow its function. Key determinants of this organisational form to consider include: the balance sought between being a consultative partner or can-do delivery body; available financial support and the need for independent fund raising; and close alignment with council policy verses the capacity to reach-out, engage with and empower sectors of the community.

An organisational business plan covering the foundations, form, folk and organisational finances will determine whether there is an effective and sustainable partnership able to deliver improvements. This organisational plan should define the inter-relationship and respective roles of partners such as the local authority, town council, business partners, Chamber of Commerce or a BID. At the heart of any such a partnership should be a core group of committed representatives able to take responsibility for coordination and communication as key activities that will drive success.

A summary of the advantages and disadvantages of different approaches to partnership development is shown in the table overleaf and available in more detail in the case study on creating talented town teams prepared by the People & Places Partnership for the LGA revitalising town centres toolkit.

Letchworth already has key elements of a town centre partnership in place with a Town Centre Strategy Group that brings together key stakeholders including two dedicated and resourced organisations concerned with particular aspects of town centre revitalisation in the BID and Heritage Foundation.

Action planning: A timetable for change

A town centre action plan is necessary to determine and define objectives, projects, responsibilities, budgets, timescales, outcomes and impact measures as the building blocks of the coordinated delivery of improvements on the ground. The annual review of such an action plan should begin and end with an assessment of available evidence and the monitoring of impacts and changes.

Advantages and Disadvantages of Different Approaches to Partnership Development		
Approach	Advantages	Disadvantages
Council-led partnership	Close connection to other council departments; budget provided	Vulnerable to budgetary pressures; can be difficult to fully engage with community & businesses
Council-coordinated partnership	Good connections to council departments; brings stakeholders together if clear purpose and/or delegated budget	Vulnerable to changing priorities; can create imbalance between action & strategic influence if role unclear
Town centre manager & forum	Partly arms-length though probable budget contribution from council	Vulnerable to cuts; important to get balance between strategic influence and engaging with business & community
Town council hosted partnership	Close local links; arms-length though conduit between authorities; modest budget need and ability to access some external funds	The 'can do' attitude can be stifled if too formal; can be difficult to fully engage with businesses without suitable sub-group or link to a Chamber of Trade, for example
Business-led town team	Business-like approach with understanding of economy and collective marketing	No assured funding stream; can have narrow business focus & lack strategic influence
Neighbourhood Plan group	Considers wider economic and community planning; exerts long-term influence	Long-term and strategic process; can lack tangible, short-term impacts or town centre focus
Development trust	Capital asset base generates revenue income; strong community focus	Requires available property and large capital investment; can have narrow focus & lack strategic influence
Business Improvement District	Income stream from rates levy; strong business focus and contacts	Can have narrow business focus & lack strategic influence if not part of wider strategy alongside council
Public-private partnership	Combines council and commercial expertise and investment with strong development focus to deliver key sites	Likely to have a narrow, site-based focus and limited life though should sit within wider strategy

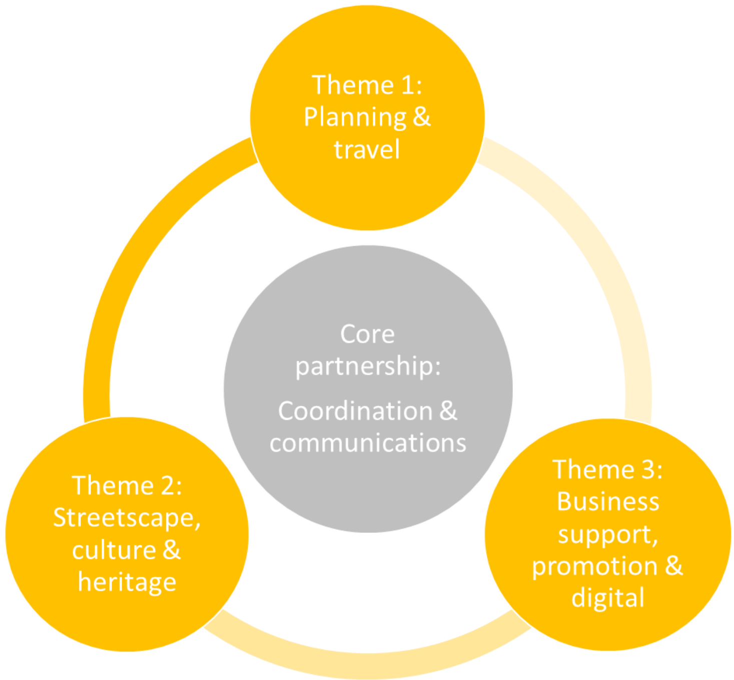
Themes for Recovery & Revitalisation

This review points to potential themes for the 'how' and the 'what' of revitalising Letchworth town centre. These themes could translate into working groups that bring relevant stakeholder organisations together and have a small coordinating group at the core.

THEME 1: Planning and travel to boost foot-flow

This theme could plan for a balanced business mix and boosting footfall through improved access including investment in sustainable travel. It covers:

- Planning & property
- Parking, travel & access



THEME 2: Streetscape, culture and heritage to increase participation

This theme could focus on sustaining the quality and appeal of the streetscape and public realm alongside engaging the community in understanding the Garden City heritage. It covers:

- Streetscape & public realm
- Culture and heritage participation

THEME 3: Business support, promotion and digital to boost appeal

A third potential theme could include support for 'softer' business development and diversification, promotion based around its distinctive heritage, and development of its digital footprint. It covers:

- Place branding & marketing
- Business support
- Digital technology & data

THEME 4: Partnership development driven by effective communication and coordination

An overarching fourth theme focuses on delivery through partnership development between key stakeholders. It covers:

- Communications & engagement
- Coordination & monitoring

Agreeing a Forward Framework

The table below provides a template for agreeing a town centre forward framework for Letchworth Garden City using the checklist of issues from the LGA Handbook on revitalising town centres and the evidence identified through the survey work. It provides a basis for developing a detailed action plan by partners with budgets, responsibilities, defined outcomes and measurable indicators of success.

Issue & potential project/initiative	Outcome sought (years 2 & 5)	Timetable
THEME 1: PLANNING & TRAVEL		
Planning & property: Are there robust town-centre-first policies, master-planning, priorities within and between towns and has work been coordinated with town centre businesses and landlords?		
Addressing the planning and property theme in Letchworth town centre will involve adding to and diversifying the business mix in ways that builds on the Garden City's distinctiveness to maintain its vitality. The North Herts Local Plan aims to promote, protect and enhance the provision of shops, financial and professional services, café or restaurants, pubs or and hospitality businesses in the District's town centres. The main planning tool proposed to achieve this is the protection of primary and secondary retail frontages within the town centre. It also allows for modest development of new premises across the District, though mainly for comparison retail. There is recognition that complementary uses such as offices can contribute to footfall. The accompanying retail study pointed to potential for leisure growth in Letchworth in particular. An earlier Letchworth Town Centre Implementation Plan provided detailed analysis of the centre's physical environment and function and provides detailed analysis that could form a basis for current town centre development planning. It included a review of the relevance of the Garden City's original goals and proposed an overall approach that built on this heritage, the town centre environment and its diversity of independent businesses. These are themes picked-up in the current draft of a town cultural strategy. Analysis of the current business mix in Letchworth town centre, indicates that it seems suited to meeting the needs of residents in terms of staple goods, social life and community function. Its business mix can be appealing for locals and visitors, but there is opportunity for expanding its offer, especially in fashion retail and convenience shopping. The main reasons for visiting Letchworth town centre were grocery shopping (41%) and leisure (39%). When customers were asked which other local towns they visit regularly, Hitchin appeared to be visited by 62% of respondents, Stevenage is visited by 32% and Baldock by 21%. The customers' survey responses about future priorities identified the town's retail, hospitality & general business mix (39%) as the theme receiving the most comments. Within this there were general comments about a perceived over-supply of some business types such as retail services (17%), followed by specific calls for more fashion retail (7%), independent shops (5%) or hospitality (4%). Customers were positive about the benefits of		

<table>
<tr><td colspan="3">town centre cafes and restaurants (80%), health services (67%), the retail grocery offer (66%), independent shops (51%), banks (50%), pubs/bars (46%) and the evening economy (39%). They were negative perceptions about the proportion of national chains (48%) and the overall business mix.

Businesses highlighted the need to manage aspects of the town centre business mix as their second most important future priority. They were though, much more indifferent about the impact of the business mix when questioned as part of a checklist of issues. Letchworth town centre businesses have negative perceptions about the potential of tourist customers (54%), competition from out-of-town shops (52%) and nearby towns (43%), rental values/rates (40%), and the performance of town centre markets. They are positive about the benefits of outdoor seating for hospitality (65%), the availability of premises (57%) and potential for local customers (41%).

The vacancy data for Letchworth Garden City indicates there are only 6% unoccupied units in the town centre, and this is much lower than the level for benchmarked large towns nationally (13%).</td></tr>
<tr><td>Letchworth Town Centre Visioning and Garden City Renewal: As the first Garden City, Letchworth has an almost unique identity that is under-exploited and provides the potential for a renewal of the original vision and goals that are only tentatively referenced in some quarters. The opportunity should be taken to renew the Garden City vision through engagement with key stakeholders and in a way that will inform future priorities for physical change and promotion of the town and its identity.</td><td rowspan="3">Refreshed vision and priorities leading to the investment and delivery of improvements to the physical distinctiveness, travel, sustainability, creative and community culture of the town, its identity, brand, promotion and events.

Balance of business uses and function to best serve resident and visitor needs.

Improved business and customer perceptions in biennial resurvey.</td><td rowspan="2">2022</td></tr>
<tr><td>Review of Letchworth Town Centre Implementation Plan: A review should be undertaken of the vision, principles, achievements and current relevance of the previous Implementation Plan as a basis for informing future investment and delivery aimed at improving the physical appearance of the town centre and movement within it.</td></tr>
<tr><td>Town centre planning strategy incorporating use class review: Review existing Local Plan town centre strategy and supplementary guidance to deliver physical change and promotion of the town and its identity. This will include defining primary/secondary retail areas and change of use policies in the light of new government guidance.</td><td>2023</td></tr>
</table>

Parking, travel & access: Is an integrated and customer-focused parking, travel, and access strategy in place?		
Planning and delivery of travel, parking and access improvements can build on perceived strengths of the Letchworth town centre and be part of the refreshing and reassertion of its Garden City qualities. The Letchworth Sustainable Travel Town Plan led by Hertfordshire County Council, aims to increase the number of people walking, cycling and using public transport in the town. This is complemented by a series of transport plans created by the Letchworth Garden City Heritage Foundation that include proposals for the encouragement of active and public transport from new developments to the town centre and station. Previous studies have indicated that there is an adequate supply of car parking, with opportunities to modify how it is managed to better serve different types of users, including through the District Council's Parking Strategy that is working to encourage a modal shift. Survey respondents indicated that currently their primary mode of travelling to the town centre was by car (50%) and on foot (47%). Travel by car (45%) and on foot (38%) are also the most popular secondary choices, followed by cycling (7%) and bus (4%). When Letchworth town centre users were asked which other local towns they visit regularly, Hitchin appeared to be visited by 62% of respondents, Stevenage by 32% and Baldock by 21%. In terms of customers' positive perceptions of Letchworth's town centre's environment, pedestrian access around town (84%), road links (67%), and walking and cycling routes to town (56%), all featured as key strengths. Customers were negative about on-street parking (69%) and to a lesser extent off-street car parks (44%). Customers' future priorities for Letchworth town centre featured moderately prominent comments about extending pedestrianisation of the town centre (51). Businesses were positive about pedestrian access around town (76%), walking or cycling routes to town (53%) and road links (52%). The top future priorities for businesses included comments focused on issues related to parking management and provision along with some aspects of travel (18%).		
Development and delivery of Letchworth Sustainable Travel Town Plan: Stakeholder engagement including reassurance to businesses, project management and monitoring led by Hertfordshire County Council to deliver a modal shift towards active travel and public transport, incorporating proposals in the Heritage Foundation's Cycling Strategy.	Increased use of active travel and public transport to access the town centre.	2022-26
Parking provision & perceptions: Customer-focused parking review covering quality, quantity and cost of provision as part of wider town centre access using People, Places & Parking process or similar approach.	Positive stakeholder perceptions shown by re-survey of impact of parking.	2023
Letchworth Station accessibility and forecourt enhancements: Planning and delivery of integrated enhancements to platform accessibility and physical/visual connection of station forecourt as arrival point to the town centre including potential cycle hire locker.	Improved accessibility and positive perceptions of town revealed in biennial survey.	2023-24

THEME 2: STREETSCAPE, HERITAGE & CULTURE		
Streetscape & public realm: Has a funding strategy and ongoing, prioritised streetscape and public realm improvement plan been agreed with an understanding of 'connected value'?		
The stakeholder survey data broadly indicates good satisfaction with the town centre environment by existing users, although there remains scope for well-targeted interventions to boost the appeal and footfall across various areas of the town centre. The previous Town Centre Implementation Plan contains detailed urban design analysis on topics such as legibility, public realm and frontages that could form the basis an updated review of progress and current priorities with a view to encourage the attraction of moving around the central streets and spaces. The Letchworth BID business plan also seeks to help provide a welcoming, attractive and easily accessible environment for visitors, workers and residents to explore and enjoy. Analysis of the customer responses received in Spring 2022, revealed that a significant proportion (31%) have decreased their frequency of visits to Letchworth town centre following the COVID-19 pandemic, whilst 16% said that they have been visiting the town centre more frequently. A quarter of customers are in and out of the town centre quickly with 26% spending less than an hour, while over a half (54%) spend one to two hours. The new town centre footfall and foot-flow monitoring system will be very useful in understanding, influencing and monitoring how often users visit, how they move around the town centre and changing patterns. Customers were very positive about pedestrian access (84%), convenience (83%), cleanliness (75%), public spaces (74%), outdoor seating for hospitality (70%), physical appearance (66%) and built heritage (64%) of the town centre. The Broad theme of appearance and signage (139) received a significant number of comments in terms of future priorities, with appearance (28), greenspace (26), public outdoor seating (22) and requests to retain outdoor seating for hospitality (22) prominent with these. From the responses to the survey, businesses appear most positive about the town's public spaces (78%), pedestrian access (76%) and cleanliness (74%). They are also moderately positive about outdoor seating for hospitality (65%) and safety (61%) and appreciate physical appearance (50%).		
Place and movements study: A review of how people move to and around Letchworth including between arrival points and town centre based on previous understanding in Town Centre Implementation Plan about legibility, active travel opportunities, new development, events management, business distribution, the purpose of trips and customer needs.	Positive perceptions and increased access across town centre shown by foot-flow monitoring.	2022-23
Public realm enhancement feasibility and planning: Investigation of the feasibility of targeted public realm enhancements that will help enable improved appeal and movement between different public spaces including greenspace, based on a review of previous Implementation Plan and the place and movement study.	Increased footfall and foot-flow across the town centre between public spaces. Improved customer perceptions and business	2023-24

	performance in biennial resurvey.	
Designing out town centre crime: Design and management of the town centre crime and anti-social behaviour through application of initiatives such as Secured by Design	Increased footfall; improved perception of safety; reduced crime.	2023-24
Culture & Heritage: Is a plan in place to conserve the town centre's built heritage & celebrates its culture as part of the distinctive and authentic identity in a way that improves community engagement, understanding and experiences, whilst boosting business performance.		
The Heritage Foundation's revised Strategic Plan articulates wider community ambitions for the Garden City alongside the work of North Herts Council, Hertfordshire County Council and other key partners. The Strategic Plan focuses on improving life chances, making Letchworth a great place to live and driving investment in the town, with a new a fourth objective of initiating a financial recovery roadmap in response to COVID-19s impact. The draft of Letchworth's Culture Strategy published by Letchworth Garden City Heritage Foundation, places culture at the heart of the town's strategy to deliver sustainable, people focused improvements for the community, visitors and the creative businesses. The Culture Strategy's vision is that by 2026, "Letchworth will be a thriving arts, culture and heritage centre, attracting audiences from around the country and the world, providing opportunities for all to engage and achieving high levels of cultural participation for our residents."		
Letchworth's Culture Strategy: Development and delivery of the Culture Strategy in a way that contributes to a renewal of the town's Garden City identity and delivers quick wins that demonstrate the value to businesses and the local community, and boost 'pride in place', for example (see below):	Increased community, cultural participation; raised visitor profile and numbers; growth and improved performance amongst cultural businesses.	2022-26
Sharing the Garden City story: deliver cultural activities and share the story of the garden city in our neighbourhoods and open spaces, increasing accessibility for all.	Increased engagement and understanding leading to enhanced pride of place.	2022-24
Engaging local schools in Garden City story: work with schools to support the curriculum requirements relating to "cultural capital" and increase young people's engagement with the arts and the Letchworth Garden City story.	Increased engagement and understanding leading to educational attainment.	2022-24
Reinvigorating landmark buildings: Support for the development, restoration or refurbishment of local cultural and heritage town centre assets through enhanced assistance for existing cultural institutions and promotion of increased participation.	Creating increased footfall and improved perception of facilities/amenities.	2023-25

THEME 3: BUSINESS SUPPORT, PROMOTION & DIGITAL DEVELOPMENT
Business support: Is there tailored training/mentoring and a strategy to enhance the quality and distinctiveness of retail, services, hospitality and leisure businesses based on current provision, trends and knowledge of competing centres?
In challenging times, it will be important to continue to engage with, understand and address businesses' needs as well as working with them as key assets in promoting a refreshed identity and brand for the Garden City. The Letchworth BID works to support businesses in improving the trading environment and promotion of the town. The draft Business Plan presented a very broad vision for the town which the BID seeks to help achieve through its programme covering four types of activities including organising events and promotional activities; reviewing access and parking; promoting and developing what Letchworth Garden City has to offer. Letchworth's Culture Strategy seeks specifically to support the town's cultural practitioners to develop their skills and secure opportunities to grow their businesses. Hertfordshire LEP has recently launched its Strategy for Clean Growth. The business data for Letchworth indicates that current retail services focus on provision of goods for home, luxury and personal care, with a low provision of fashion retail indicating that some needs might have to be met elsewhere. While the proportion of convenience retail outlets is relatively low (6%), it meets some of the existing demand. The combined proportion of comparison and convenience retail (46%) is only slightly lower than that of similarly sized towns (49%). The proportion of hospitality businesses is slightly higher when compared to similar-sized towns, indicating that the town centre serves its social and leisure function well. Letchworth's professional service and office space provision is slightly lower than national average. A modest proportion (19%) of Letchworth businesses reported that the pandemic had a positive impact on profitability, whilst in contrast, 69% of businesses responded that profits were negatively impacted. When asked about projected impact on business profits over the 12 months from March 2022 when compared to pre-pandemic trading, over a third of businesses (35%) are optimistic compared to a similar proportion (37%) who are pessimistic. Customers were very positive about Letchworth's hospitality offer, rating cafes and restaurants (80%), health services and pharmacies (67%), grocery retail (66%), customer service (61%), independent shops (51%) and access to banks and ATMs (50%). They were negative about the representation of comparison retail (62%), national chains (48%) and the overall business mix (46%). When customers of Letchworth were asked what two things would improve the town centre, hospitality & general business mix (39%) emerged as the theme receiving the most comments. Within this there were specific calls for more fashion retail (7%), independent shops (5%) or hospitality (4%). When businesses were asked about their perceptions of the Letchworth's trading environment, they were most positive about the town's cafes & restaurants (77%) and potential for local customers (48%). Businesses appear to be most negative about potential tourist customers (54%), out-of-town competition (52%), markets (48%), the existing offer if compared to nearby towns (43%) and rental/rates costs (40%). They appeared indifferent about the town's local partnerships, online identity, events and leisure activities.

<table>
<tr><td colspan="3">When businesses in Letchworth were asked to propose two suggestions to improve the town centre, the top priority for businesses was promotion of the town through events, better marketing and the visitor economy (25%). There were specific sentiments to improve digital promotion of the town in additional to regular marketing. A further 10% of comments touched upon the perceived high level of vacancy within the town centre and rental costs, whilst 8% gave priority to improving aspects of local leadership.</td></tr>
<tr><td>Business engagement and support: Working through Letchworth BID to understand businesses' needs across sectors, engage with and draw-down funds to provide appropriate, long-term, tailored support for their development and engagement in town-wide marketing and event planning.</td><td rowspan="2">Increased business membership and engagement

Sustained or enhanced business mix.

Improved customer perceptions and business performance in biennial resurvey.</td><td>2022-26</td></tr>
<tr><td>Business diversification programme: Work alongside proposed planning use class review, an empty premises audit, markets review, shared workspace feasibility studies and culture strategy, to understand opportunities for business diversification and attract inward investment in-line with renewed town centre vision.</td><td>2022-26</td></tr>
<tr><td>Promotional campaigns for Letchworth's independent and hospitality businesses: A town-wide campaign highlighting individual, distinctive and high quality independent and hospitality businesses to boost promotion of the recognised strengths of these sectors as part of town's identity and branding.</td><td>Improved customer perceptions of town and businesses leading to improved business performance.</td><td>2023-24</td></tr>
<tr><td>Marketing and digital support: Provide training and support to help upskill individual businesses and enable their participation in Letchworth's digital development and promotion.</td><td>Increased digital activity and profile of businesses and town in-line with vision & brand.</td><td>2022-26</td></tr>
<tr><td>Support for Clean Growth in Letchworth: There is an important opportunity to work with Hertfordshire LEP to investigate growth opportunities for new and existing business in Letchworth including through the growth of the Low Carbon Environmental Goods and Services (LCEGS) sector; delivering transformational wider outcomes for all parts of the economy; working with Cranfield University to research and map Letchworth's economic future including local areas of bioscience and exploring digital; whether Letchworth can become a 'smart town'.</td><td>Growth of sustainable business sectors with added value though skills training and carbon reduction.</td><td>2023-26</td></tr>
</table>

Creation of co-working spaces: Explore opportunities to adapt the spaces we own to create co-working spaces for start-ups, freelancers and the creative community	Growth of new and existing businesses with added value from local spend.	2023
Support for social economy: Collaborate with the School for Social Entrepreneurs to support local entrepreneurs to scale up their businesses and explore opportunities to encourage enterprise development	Growth of new and existing businesses with added value through delivery of social or environmental objectives.	2022-24

Place branding & marketing: Is there a clear understanding of the town brand with pooled budgets and a creative, collective marketing campaign?

Analysis suggests brand development and marketing needs to continue to emphasise the positive aspects of Letchworth town centre including a renewal of its Garden City identity and branding.

When asked how often users visit town centre post-pandemic, 77% of users responded that they are visiting the town centre at least once a week. Nearly a third (31%) said the frequency of their visits has reduced because of the pandemic, whilst only 16% said it had increased. A quarter of customers are in and out of the town centre quickly with 26% spending less than an hour, while over a half (54%) spend one to two hours.

When asked how their experience of Letchworth town centre had changed in recent years, 26% of town users said it had improved, whilst 29% of said that their experience had worsened. When users were asked if they would recommend a visit to Letchworth town centre, more than two-thirds (68%) of users said yes. When asked to summarise their sentiments about Letchworth town centre in a word, many of the most prominent phrases used were negative, such as declining, boring, lacking, empty, tired and unexciting. In contrast, there was a small proportion of positive sentiments expressed using words such as potential, evolving, unique, welcoming, improving and bustling.

Businesses were modestly positive about the potential of local customers (41%), though much less so for tourist customers (9%). They appeared indifferent about the performance of town's local partnerships, online identity, events and leisure activities. When asked about future priorities, customers gave the strongest backing to promotion of the town through events, better marketing and promotion of the visitor economy (25%). There were specific sentiments expressed about improving digital promotion alongside regular promotion of the town.

Letchworth has a strong record in organising events in and around the town centre including its month-long festival. An important aspect of the future recovery and long-term development of Letchworth town centre will be animating it by on this track record of creative events.

There are recurrent, though often indirect or disjointed, references in strategies to make more of Letchworth's Garden City identity. For example, the Letchworth Town Centre Implementation Plan revisited the founders' original goals and proposed they are part of the unique appeal that should be capitalised on. Letchworth BID's Business Plan presents a very broad vision which in many ways encompasses a renewal of town's origins including as a "*21st century Garden City which is connected and engaged with its communities*" and an animated place that "*has a strong sense of identity and awareness and is recognised internationally*." The Culture Strategy's vision is that by 2026, "Letchworth will be a thriving arts, culture and heritage centre, attracting audiences from around the country and the world, providing opportunities for all to engage and achieving high levels of cultural participation for our residents."

<table>
<tr><td colspan="3">Such a reaffirmation of Letchworth Garden City's identity can develop in a way that complements the BID's recent organisational re-branding and ongoing work led by the District Council to prepare North Herts branding guidelines.</td></tr>
<tr><td>Place identity, branding and marketing plan: Assessment of the Letchworth Garden City identity, a renewed version of the original vision, its evolving role and public perceptions of what the legacy means today. This will enable the preparation of branding guidelines and a marketing plan to provide cohesion to physical change and progressive economic, social and environmental development in a way that helps raise the profile of the town in way that appeals to the local community and presents a distinct destination to visitors.</td><td rowspan="4">Creation of a strong and distinctive identity that can inform physical enhancements and underpin traditional and digital promotional campaigns.

Increased footfall and foot-flow across town centre, including evidence of new and return visitors for events.

Improved customer perceptions and business performance in biennial resurvey.

An increased sense of civic identity and pride in place consistent with the national levelling up agenda.</td><td>2022-23</td></tr>
<tr><td>Lively and well promoted place: For Letchworth BID to continue to take a lead with partners in creating a place which is lively, has a strong sense of identity and creates increased awareness through, for example, developing promotional campaigns to attract more people and loyalty schemes, to encourage more frequent use of the town centre. using digital and social media and create Sundays as a day for a great family experience.</td><td>2022-26</td></tr>
<tr><td>Annual events programme: Developing, coordinating & delivering an annual events programme including community-led events, cultural activities, festivals and sports activities that help boost the town's identity and attract foot-flow around town at different times of the year.</td><td>2022-26</td></tr>
<tr><td>Town loyalty scheme: Work with partners to scope a town-wide loyalty scheme to encourage people from Letchworth and the surrounding area to shop, eat out and come to our cinema, gallery and museum.</td><td>2023-24</td></tr>
<tr><td colspan="3">Digital technology & data: Is there an ongoing assessment of digital infrastructure and skills with an investment plan and approach for the collective use of data in marketing and monitoring the town centre?</td></tr>
<tr><td colspan="3">Digital development in Letchworth needs to strike a balance between the demand for improved infrastructure and the priority given to enhanced services for local and tourist customers.

There is no specific social media or digital strategy for Letchworth though it is a recognised part Letchworth BID's promotional work and the Heritage Foundation's Cultural Strategy proposes to create a digital communications platform for local practitioners.

North Herts Council has recently adopted a new mobile phone-based footfall monitoring system for Letchworth Garden City as part of a wider scheme with other North Herts towns. This system will potentially give very useful baseline data as well as routine updates to understand the changing use of the Letchworth town centre post-pandemic with benchmarking possible with neighbouring towns.

Whilst, the following web sites and social media platforms each serve slightly different audiences and organisational roles, it is important to coordinate and clarify their contribution to the town's digital footprint: Visit Herts; Discover Letchworth; Letchworth.com plus on Facebook and</td></tr>
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<table>
<tr><td colspan="3">Instagram (Heritage Foundation); Love Letchworth web site and Instagram (Letchworth BID). There are also two private, community Facebook pages with a combined total of 8,000 followers and Letchworth Business Group page with 1,800 members.

Customers had slightly positive perceptions about the existing online identity of the town centre with modest positive (37%) and more limited negative (13%) sentiments expressed. Customers gave a high future priority to the use of social media for insights about businesses, products, places to eat, things to do (59%), followed by receiving direct updates from favoured businesses (53%).

Businesses had mildly negative perceptions about the existing online identity of the town centre with modest negative (30%) and limited positive (13%) responses, whilst the majority were neutral (57%) about current performance. Businesses also called for priority to be given to improving the digital promotion of the town alongside traditional methods. Businesses stated that an effective broadband connection (73%) and good digital phone network coverage (68%) were important to their future performance. They also gave high importance to the regular use of social media to promote their business and engage with customers (72%), followed by web site creation and management (67%).</td></tr>
<tr><td>Enhancement and delivery of digital promotion: Stakeholder engagement with businesses, community groups and existing, established social media channels to deliver an enhanced and curated social media profile for Letchworth, its streetscape, businesses, attractions and events, boosted by using a platform such as Maybe* and its curated Town Rewards platform.</td><td rowspan="2">Improved customer perceptions and business performance in biennial resurvey.

Increased digital activity and profile of businesses and town.</td><td>2022-24</td></tr>
<tr><td>Assessment, feasibility and planning of digital infrastructure investment: An assessment of current digital infrastructure capacity and potential future provision in terms of Wi-Fi, digital phone network and broadband to better serve business and community needs.</td><td>2022-23</td></tr>
<tr><td>Regular footfall monitoring and review: Adopt a template for quarterly footfall and foot-flow monitoring including assessment of impact of interventions with partner organisations.</td><td>Improved evidence-based understanding of customer activity/profile and impact of interventions.</td><td>2022-26</td></tr>
</table>

THEME 4: PARTNERSHIP WORKING: COORDINATION & COMMUNICATIONS

COMMUNITY ENGAGEMENT & COORDINATION: Is there strong public, private and community engagement with active and coordinated involvement in planning and delivery that extends to community assets development and is backed by a clear communications plan?

COMMUNICATIONS & ENGAGEMENT

Proposed activity as part of Letchworth town centre recovery and revitalisation includes numerous opportunities to boost the town's identity and sense of progress through ongoing and proposed new activity. Research promoted as part of the UK Levelling Up shows the importance of vibrant town centres and community participation in boosting pride in place. Effective coordination between organisations and clear communication of proposals and achievements to the wider community will be important in creating such positive sentiments. It will be important to engage businesses as part of this and reach out especially to younger generations including families.

Communications planning should cover the delivery of internal communications between partners and external engagement and marketing with wider stakeholders. Elements of the roll-out of communications and engagement can include:

- mechanisms for internal coordination between key partners around key themes
- involvement of wider business community including upskilling in digital activity to deliver demonstrable benefits
- engagement of wider stakeholder groups and community organisations activities and events.
- working with established social media and press to promote positive stories and evolving town identity/brand

<table>
<tr><td>Communications planning: Preparation and delivery of internal communications between partners and external engagement with wider stakeholders.</td><td rowspan="2">Positive community & business perceptions shown in re-survey including improved experience of town centre.

Tracking of positive social media activity.</td><td>2022></td></tr>
<tr><td>Stakeholder engagement: Proposed, new digital platforms can convey informative and positive updates for stakeholder groups and wider community, incl. promoting heritage, cultural offer, activities and events</td><td>2022></td></tr>
</table>

COORDINATION & MONITORING

There is the opportunity to use this initial forward framework for evolving the already increasing joined-up delivery to create measurable, town-wide change. Part of this can involve improving various aspects of the 'how' of delivering town centre revitalisation through enhanced partnership working to achieve increasing ambitions.

Letchworth is already in a strong position for coordinating the effective development, delivery and coordination of this Forward Framework by virtue that it has Town Centre Strategy Group that brings together key stakeholders on a regular basis. Letchworth also benefits from already having two dedicated and resourced organisations concerned with particular aspects of town centre revitalisation in the BID and Heritage Foundation.

<table>
<tr><td colspan="3">Elements of this partnership working and coordination that may need active strengthening in future are:
• capacity & partnership mapping including resourcing needs; involvement of volunteers; employment of necessary staff; and joint working between stakeholder groups.
• finances & investment including expertise to identify and bid for external funding; financial accountability; diverse and sustainable funding mechanisms.
• governance & influence including coordinating stakeholder activity across themes; influencing strategic partners; and options for evolution of a formalised partnerships.
• strategy & plans including an evolving forward framework with a rolling partnership development and action plans that coordinate and monitor delivery on the ground using a suite of monitoring indicators.</td></tr>
<tr><td>Facilitating partnership working groups/themes: Organisation, involvement, evolution and reporting of three theme-based working groups and coordinating ‘hub’ as part of District-wide local and strategic partnership development.</td><td rowspan="4">Evidence of effective partnership working with evolving plans to deliver projects and achieve strategic influence.

Additional fundraising and investment achieved.

Suite of monitoring indicators that demonstrate success & inform revised plans.</td><td>2022-26</td></tr>
<tr><td>Quarterly footfall and foot-flow analysis: Regular analysis and stakeholder engagement during recovery and beyond using quarterly footfall monitoring reporting.</td><td>2022-26</td></tr>
<tr><td>Digital impact monitoring: Investigation & installation of affordable, digital impact monitoring systems such as Maybe* social media benchmarking sentiment analysis</td><td>2022-26</td></tr>
<tr><td>Biennial town centre survey: Repeat of town centre business and customer survey to monitor progress and perceptions of town centre recovery and revitalisation.</td><td>2023 & 25</td></tr>
</table>

Next Steps

This report is a detailed piece of work that necessarily pulls together existing policies/proposals and a stakeholder perspective of issues in a systematic way. Its aim is to provide an action-orientated approach that can be delivered by a coming together of key local partners and a realistic appraisal of priorities and resourcing needs. In this way it is possible to set about making a meaningful difference to the long-term vitality and viability of Letchworth Garden City's town centre. This needs to be achieved in a coordinated way and not as a cherry-picked list of projects championed by individual organisations. Realistically, this should be viewed as a 5-10 year project that will need extra resources including organisationally to coordinate delivery.

Below are the proposed next steps that partners will need to consider and undertake in the process of developing and delivering a robust partnership and action plan able to aid the town centre's recovery and revitalisation.

1. *Finalise development plan and 'forward framework'*: Key stakeholder organisations need to review and comment on this draft development plan and its forward framework to enable People & Places to finalise it.
2. *Publish stakeholder summary*: A short, illustrated version of the development plan findings can be published by People & Places for wider distribution, possibly supported by an accompanying video presentation.
3. *Meetings of theme-based sub-groups*: Initial meetings need to be organised of theme-based sub-groups to discuss the development of proposals for the three thematic areas and partnership working/governance. People & Places can help assist in determining the membership and format of these groups, as required.
4. *Agreement of vision*: The Town Centre Strategy Group and sub-groups need to agree an overarching vision that links objectives from each theme. People & Places can assist by proposing a vision and objectives as a starting point to 'react to' based on a genuine evolution of the original Garden City ethos.
5. *Partnership development and governance*: The key stakeholders represented currently on the Town Centre Strategy Group need to determine the partnership development and governance arrangements for revitalising Letchworth's town centre. This includes focusing on the representation and roles for a core group responsible and equipped to manage the coordination of activity, including identifying resources, communication and engagement with wider stakeholders.
6. *Determine initial delivery priorities*: The evolving partnership needs to determine initial delivery priorities that underpin long-term strategy and capacity as well demonstrate 'quick wins' to stakeholders and the wider community. The Shared Prosperity Fund provides an initial and flexible injection of funds to help achieve this.