Royston Town Centre
Recovery & Development Plan

August 2022

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This report has been prepared by the People & Places Partnership for North Herts Council
with support from the European Regional Development Fund
through the Department for Levelling Up, Housing and Communities
in association with Royston Town Council and Royston First BID.

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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 Royston town centre. This is done on behalf of North Hertfordshire Council, in association with Royston Town Council and Royston First BID.

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. In the short term, it seeks to map out an effective, strategically high level COVID recovery plan for its town centres. The medium- and longer-term development strategy framework aims to assist the town centres in developing 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 the local council and partners to develop a 'Forward Framework' that focuses on both the 'what' and the 'how' of town centre recovery and development.

Review: Existing Strategies

Review of existing strategies

Work to prepare the Recovery and Development Plan commenced by engaging with members of the Town Strategy Group. A detailed desktop review and analysis of existing local strategies relating to Royston town centre was then conducted. 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, cafés, restaurants, pubs or drinking establishments and takeaways in the main centres of Hitchin, Letchworth Garden City, Baldock and Royston.

The Local Plan acknowledges Royston as the third largest of the four towns in North Hertfordshire when measured by population. Located away from the Hitchin, Letchworth, Baldock group, it plays an important service role for many of the surrounding villages in both Hertfordshire and Cambridgeshire.

The economy of Royston is split between the town centre functions and the large employment area or industrial estate to the north of the town, although both are covered by the Business Improvement District (BID). The Plan suggested that, to deliver additional jobs targets, a new employment area should be developed. Land off York Way is allocated for this purpose. There is also a recognised need for additional retail floorspace with the capacity projections for growth of 7,100 gross m^2 to 2031. This extra retail should be accommodated on the Town Hall site and provide approximately 4,000 m^2 of gross of additional main town centre use floorspace.

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.

Royston Town Centre Strategy (2008)

The Royston Town Centre Strategy is a supplementary planning document adopted in 2008, setting out Councils' vision and aims for the town centre in the next 15 years. It set out the vision and key aims for Royston town centre to be identified as a vibrant heart. Seven opportunity sites were identified as potential locations, with a scope to address some of the main issues facing the town centre as it seeks to transform and support the vision. The Royston Town Centre Strategy highlighted that, in-line with best practice nationally and elsewhere in the District, through traffic is directed onto local distributor roads outside of the main town centre shopping areas. Some of the town centre roads, such as Fish Hill and Market Hill, are indicated as having heavy traffic activity. While allowing adequate access to the town centre businesses, they interrupt and detract from the appearance, amenity of the town centre and ease of pedestrian movements. The Town Centre Strategy also allocated policy guidance to support partnership between bus operators and Hertfordshire County Council to bring improvements to town bus services and increase the numbers of passengers accessing the town centre. The strategy also highlighted that there is a potential to bring improvements to the public realm in the medium and long-term with a reduction in the overall level of car park provision. A process of continuing review should, however, be undertaken to reflect that change.

Parking, travel and access

The North Herts Local Plan identified a 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.

North Hertfordshire Transport Strategy

This Transport Strategy supported the then emerging North Hertfordshire District Council (NHDC) Local Plan.

Royston Transport Strategy

The transport strategy identifies Royston as a town affected by the high influx of commuter demand from surrounding villages. This is partially a result of the location of the town, with more than half of commutes to destinations outside of the North Hertfordshire area. The roads within Royston are, in general, described as broadly within the capacity, with some delays within the town in the evening peak hours.

Streetscape and public realm

The Town Centre Strategy referred to the detailed urban design assessment for Royston that was carried out in July 2007 as an analysis of the key characteristics and opportunities of the streetscape. It suggested that the town centre was predominantly of historic character with most commonly two, and occasionally three, storey buildings. It also suggested that while being of unique character, the extent and quality of the historic environment in the town centre limited development opportunities. The Strategy also involved in-depth townscape analysis of sites located around the opportunity areas and suggested possible pedestrian linkages.

Business Support

Royston First BID Business Plan (2019 – 2024) and Priority Projects

The Royston First Business Improvement District (BID) was established in 2003 and covers the town centre and industrial estate areas. The BID is a business-led body formed to improve and sustain commercial activity.

The BIDs' Priority Projects plan contains details of proposed activities aimed at supporting local business activity:

- Printed guide to every consumer-facing business in Royston listed by trade and distributed to 15,000 households annually
- On-going support for the library (via the Royston Information Centre), the market and the cinema
- Regularly showcasing some of the industrial estate's creative companies and the diverse product ranges in the town centre
- Produce a detailed plan as a contingency should a large store become vacant in the High Street for an extended period

Place branding and marketing

Across Royston BID's proposed list of actions, the following target promotion and marketing of the town centre:

- Town trails and events programme
- "Discover Royston" distributed through the information centre
- Run a local beer, wine and cheese food festival

Digital technology and data

There is no specific social media or digital strategy for Royston though it is a recognised objective of Royston BID's Priority Projects plan. This aims to improve the existing town-centre website and oversee targeted social media campaigns to promote aspects of the commercial scene to a local audience.

Evidence: The Survey Findings

The place

The business mix

The business data for Royston indicates that current retail focus on provision comparison retail such as items for personal care, home and luxury. While proportion of convenience retail businesses is low, taking up only 4% of the total business mix, that includes town centre Tesco supermarket that caters for residents' convenience shopping needs. There are also enough retail service providers that is comparable with the average for small town. The provision of financial and professional services is very good, higher than national average, indicating that these needs cater town residents well.

The proportion of hospitality mix is considered as a good for the town of a small size, providing sufficient offer for residents with 7% of cafes and restaurants, 5% bars and pubs and 6% of take aways.

Levels of Sui Generis are higher when compared to other smaller towns and indicate presence of diverse service, majorly those for personal care.

Overall, the Royston town centre business mix is suited to meet basic everyday shopping needs of residents including staples, food, personal care items and professional services as well as to cater social life with diverse hospitality offer. However, proportions of data indicates that town's focus is its local customers rather than external visitors.

Comparison verses convenience retail

Examining the retail mix specifically, reveals that the proportion of comparison retail (89%) in Royston is significantly greater than convenience. It is also slightly higher than the proportion benchmarked across small 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.

Ownership types

The data for Royston indicate that there are 3 key attractors in the town centre – Tesco Express, WHSmith and Boots. Across the rest of the businesses, 73% are independent shops, with another 21% under regional or multiple ownership. The number of independent shops is slightly higher than the average across small towns nationally.

Vacant business units

The vacancy data for Royston indicates that out of 142 total town centre units only 1 is unoccupied making it less than <1% which is significantly lower than the level for benchmarked small towns nationally (9%). This indicates that available premises are being used very well and that almost none expansion of retail can be performed by reoccupation of vacant units.

Footfall

Whilst footfall monitoring was not part of this survey work for Royston, 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 2 private car parks and 7 public car park serving Royston town centre shows there are a total of 920 spaces. Most of the car park spaces are available on a long-stay basis (92%), of these 355 spaces are in public car parks and can be used for both short and long stay. A further 480 spaces are available in a peripheral site at Tesco Extra supermarket located to the north of the town centre. This car parks cater largely for their own users, on a short-stay customers only basis.

The people

Response to business survey

Survey forms were electronically distributed to all the town centre businesses in Royston. The following percentage figures are based on the 30 returned business confidence surveys from a total of 142 town centre businesses and organisations. This is a return rate of 21% compared to 25% nationally and suggests a high level of interest within the town's business community. It is also indicative of a high percentage of independent retailers that are often owner-managed and more engaged in partnership working.

Of the businesses that responded to the survey, 47% were shops or retail services of some kind, and 10% were hospitality businesses. Unusually, for a survey of this nature, 20% were office, light manufacturing or distribution though this is because the survey was distributed to all BID members including those on industrial estates. 73% of these respondents were independent businesses

A total of 86% of these businesses are long-established in Royston, having been based there for at least six years. This compares to 72% of businesses in benchmarked towns nationally. The fact that 7% of Royston businesses surveyed had been established for less than, indicates a normal turnover in the town's traders, compared to benchmarked towns nationally.

Response to customer survey

A sample of 330 Royston town centre users were surveyed online through social media using the help of Royston Town Council.

Almost two-thirds of respondents were female, a comparable proportion compared to surveys conducted in towns nationally, in which two-thirds of respondents were female. There was healthy participation across age groups, with 36-45s providing the most responses (26%).

It is evident from the responses that most customers surveyed (46%) primarily visit Royston town centre for convenience shopping, such as groceries. This is followed by visits for leisure (27%), accessing services (14%), work (5%) and small proportion for comparison shopping for fashion, gifts etc (2%).

Analysis of the 330 responses received from town centre users reveals that nearly a third (29%) of town centre users have reduced the frequency of their visits to Royston town centre due to the COVID-19 pandemic. Interestingly, 52% of users said that the pandemic has engendered no change in the frequency of their town centre visits, with 19% stated that their visits have become more frequent as a result of the pandemic.

A substantial majority of respondents (72%) are frequent visitors to the town centre, visiting more than once a week. Only 10% are infrequent users who visit Royston once a month or less. Over four-out-of-ten respondents are in and out of the town centre quickly during a typical visit with 42% spending less than an hour, while slightly more (46%) spend one to two hours. A further 9% dwell uptwo to four hours, with 2% spending all day in town.

The figures for respondents' origins indicate that a large majority (99%) of town centre users live locally and that 1% visit from within a 30-minute drive of the town. The views expressed are therefore overwhelmingly those of local residents and visitors. This suggests that balance must be struck between addressing local issues and improving the shopping, hospitality, and leisure offer of the town centre.

As part of the Royston 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 (56%) and car (41%) are the preferred primary methods of travel to town. Travelling to town by car (55%) and on foot (31%) are also the most popular secondary methods of travel into town, with no other mode gaining more than 5% of responses. This indicates that a substantial majority of town centre users are visiting either by foot or by car.

The positives & negatives

Positive perceptions

Royston town centre businesses were first asked about their opinions on the town centre's appeal. From responses to the survey, businesses appear most positive about the road links to the town centre (73%), its cafes and restaurants (67%), public spaces (63%), markets (63%), pedestrian access around town (60%), cleanliness (59%) and potential for local customers (50%). They are also moderately positive the town centre's pubs and bars (43%), the outdoor seating for hospitality (42%) and its track record of organised events and activities (42%).

Subsequently businesses were asked about their perceptions of the town's trading environment. In this case businesses appeared most positive about the road links to the town centre (73%), its cafes and restaurants (67%), public spaces (63%), markets (63%), pedestrian access around town (60%), cleanliness (59%) and potential for local customers (50%). They are also moderately positive the town centre's pubs and bars (43%), the outdoor seating for hospitality (42%) and its track record of organised events and activities (42%).

When asked about the town centre's appeal, town centre users were very positive about convenience (73%), public spaces (61%) and built heritage (60%). They were also positive about pedestrian access around town centre (57%) and road links (53%). Majority of town centre users felt indifferent about public transport (65%).

Subsequently, customers were asked to indicate what are the positives and negatives of the current provision of town centre services and businesses. Customers are very positive about Royston's hospitality offer; rating cafes/restaurants (74%) and pubs/bars (60%) highly. Customers value the availability of health services and pharmacists (70%) in the town centre and the quality of services provided by businesses (65%).

Negative perceptions

Businesses surveyed are most negative about the town centre's appeal compared to out-of-town shopping (63%) and its on-street parking (59%). They are moderately negative about

Royston's offer compared to nearby towns (47%), its potential for tourist customers (42%), off-street parking (41%) and rental values/rates (41%).

In terms of town centre's trading environment, businesses surveyed are most negative about the town centre's appeal compared to out-of-town shopping (63%) and its on-street parking (59%). They are moderately negative about Royston's offer compared to nearby towns (47%), its potential for tourist customers (42%), off-street parking (41%) and rental values/rates (41%).

In terms of negative aspects of Royston town centre's appeal across customers, on-street parking (60%) received the higher number of responses. Customers were also negative yet with much smaller proportion about events and activities (39%), leisure and cultural facilities (36%), outdoor seating for hospitality (35%), marketing and information about what's on (32%), online information and promotion (31%) and off-street parking (31%).

In terms of negative perceptions of Royston town centre business provision, concerns about the business mix are most prominent including the town centre's comparison retail offer (56%), the shortage of national chains (55%), the overall business mix (55%) and the convenience shopping offer (47%). The highest negative score was for the town centre's on-street parking provision (60%).

Customer sentiments

A word cloud was created to represent the most popular words used by customers to sum up Royston town centre. The most prominent positive word used to describe Royston town centre is 'friendly', with some mention of 'quaint' and 'pleasant' too. Words like 'tired', 'limited', 'empty', 'dull' and 'sad' are among the most prominent negative sentiments expressed that need to be countered.

When asked how their experience of Royston town centre had changed in recent years, half of respondents said it had worsened (50%), while only 12% said it had improved and over a third (36%) said it had stayed the same or had a mix of good and bad changes.

Consistent with the balance of sentiments expressed in response to other questions, when customers were asked if they would recommend a visit to Royston town centre, just under half (47%) of respondents said 'yes'. This compares with sentiments expressed nationally, where typically 72% of users would recommend a visit to their local town centre.

Future priorities

Businesses' priorities

When businesses in Royston were asked to propose two suggestions to improve the town centre, the top priority for businesses was parking and travel (47%), with within this parking restrictions (22%) and free parking (19%) featuring prominently. This was followed by priorities for improving the retail, hospitality and business mix (22%) and matters to do with the town's appearance and signage (13%).

Customers' priorities

When Royston customers were asked what two things would improve the town centre, the dominant issue was a priority to improving its business mix (47%). Within this, concerns about the general variety of the retail mix (19%) were followed by calls for new independent retailers (5%), more High Street brand names (5%) and calls to replace the departed Morrisons store. These were followed by more modest calls to boost the number of fashion (2%) or grocery retailers. Aside from this there were specific calls to increase the variety of hospitality businesses (4%) and improve the market (2%).

The second highest broad category of priorities related to parking and travel (20%), with traffic and vehicles access (9%), pedestrian and cyclists (5%), and parking issues (4%) most prominent within this.

The third most prominent theme covered appearance and amenity (12%) and included priorities expressed for improving public amenities (7%), appearance (4%) and cleanliness (2%) of Royston town centre. Besides these broad categories, there were specific calls boost the number of town centre events (4%), tackle vacant properties (3%) and make business rents and rates more affordable (3%).

Digital Development

Businesses' digital drive

Across businesses, digital phone network coverage appeared to be the highest priority with 59% of users indicating it as a very high and 27% a high priority. This is shortly followed by fast broadband connection with 55% of business users indicating it ass a very high and 32% as a high priority. Targeted use of customer data (31% of total high and very high priority responses) and website management (52% in total) appeared to be of the lowest priority across businesses in Royston.

Town centre users

A majority of town centre users evaluate insights through social media re businesses, products, places to eat, things to do etc (17% very high priority and 45% high priority), regular updates from businesses re special offers, things to do etc (54% in total). and digital phone network coverage (50%) as high priority regarding future visits to the town. A plurality of respondents rate 'click and collect' or the ability to browse products as part of their visit as a moderate or low priority (36% in total) regarding future visits to the town.

Business performance

As the tables and charts above demonstrate, different businesses were impacted in different ways. Small numbers (10%) of businesses who responded said that the year of pandemic before December 2021 had a positive impact on profits with 14% reporting this was "strongly positive". In contrast, 24% of businesses reported that profits were negatively impacted with a further 38% saying the reduction was "strongly negative".

When asked about projected impact on profits over the next 12 months from March 2022 when compared to pre-pandemic trading, 19% of businesses are moderately positive and 5% responded that they "strongly positive" that profits are likely to be better than those before the pandemic. In contrast, 24% of businesses expect a moderately negative impact on profit compared to pre-pandemic levels, and a further 24% expect this impact to be strongly negative.

Local Leadership: Creating a Forward Framework

Revitalising a town centre is a complex and long-term venture. 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! It can be achieved by annually reviewing the checklist and updating a 'Forward Framework'. This comprises 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.

This report concludes with potential themes and a forward framework for guiding the 'how' and the 'what' of town centre recovery and revitalisation in Royston. 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.

Introduction: Revitalising Town Centres

Background

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 Royston 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.

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 (the North Herts Welcome Back Fund programme). In the short term, it seeks to map out a high level, strategic and effective COVID recovery plan for its town centres. In the medium to longer-term, it sets out a development strategy framework to assist the town centres in developing successfully over the next decade.

Policy SP4 Town Centres, Local Centres and Community Shops make references to reviewing each of its town centre strategies as part of the council's Local Plan. 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 Royston Centre COVID-19 Recovery Strategy 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 Royston town centre Recovery and Development Plan has six key elements. These reflect 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/discussions with key stakeholder groups locally, 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 an analysis of the baseline survey to prepare an evidence-led 'forward framework' template. This will have 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 and proposed interventions and recognise gaps in the responses. This will then be matched with proposals for practical suggestions as to how each town's daytime/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 as to which agencies, stakeholders and other interested parties are best placed to lead on which actions given the resources available to them.

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. This will outline medium- and longer-term ideas for each of the town centres, recommending how they can be drawn together to form a coherent framework and outline a strategy for 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/recommendations.

Similarly, People & Places will use its experience with towns elsewhere and at a national level 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. This will be done 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 a recovery planning process from the outset.

The roles of partner organisations in planning, delivery and governance will be recognised in the published plans. This will be done 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 experience, including as authors of case studies on COVID- recovery for the LGA's town centre toolkit to support the proposed actions and recommendations. This includes 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 Royston's town centre. This review supplements the survey work undertaken by reviewing and analysing existing local reports; secondary data; and existing 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 Royston'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 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 uses including shops, financial and professional services, restaurants and cafes, pubs or drinking establishments and takeaways; based on their contribution to vitality and viability and their ability to attract people to the centre.

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 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.

Royston

The Local Plan acknowledges Royston as the third largest of the four towns in North Hertfordshire when measured by population. Located away from the Hitchin, Letchworth, Baldock group, it plays an important service role for many of the surrounding villages in both Hertfordshire and Cambridgeshire.

Housing – there were four sites allocated within and around Royston, with an estimated 500 new dwellings to be built over the plan period. None of the developments are located within the Town Centre itself.

Economy – The economy of Royston is split between the town centre functions and the large employment area or industrial estate to the north of the town, although both are covered by the Business Improvement District (BID). The Plan suggested, that in order to deliver additional jobs targets, a new employment area should be developed. Land off York Way is allocated for this purpose. There is also a recognised need for additional retail floorspace with the capacity projections for growth of 7,100 gross m^2 to 2031. The Plan states, that while there was no immediate need for additional floorspace until 2021, additional floorspace will then be needed. This extra retail should be accommodated on the Town Hall site and provide approximately 4,000 m^2 of gross of additional main town centre use floorspace.

North Hertfordshire Retail Study Update (2016)

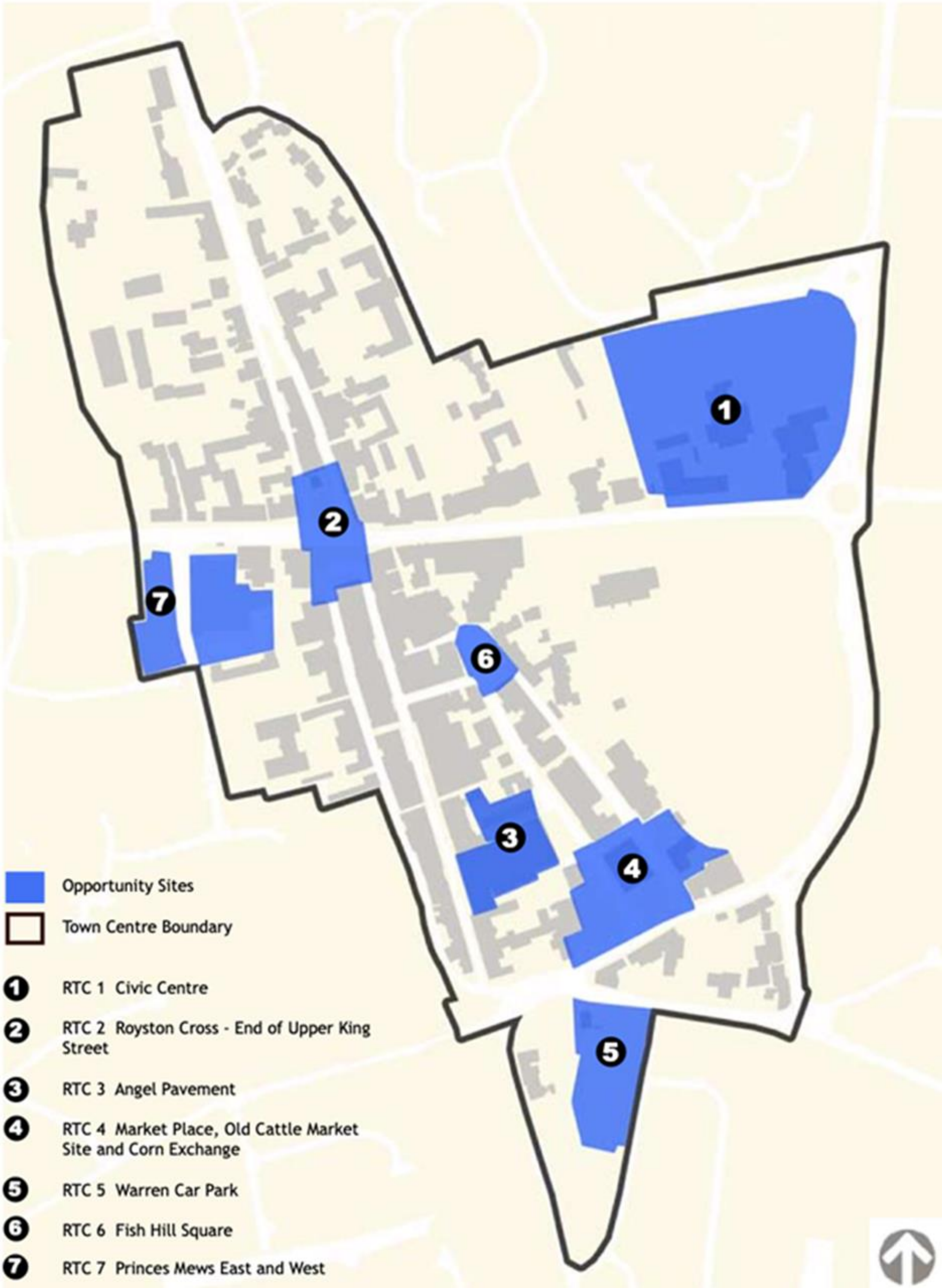
The North Hertfordshire Retail Study Update prepared in 2016 outlined business growth needs for the retail and leisure sectors to maintain the competitiveness of District's towns. The retail study informed the Local Plan targets for A1 growth. The report indicated that the estimated projection for additional Class A1 to A5 floorspace in Royston is 5,200 m^2 gross by 2026, increasing to 7,100 m^2 gross by 2031 of which 1,100 m^2gross could be met by the reoccupation of vacant floorspace.

Royston Town Centre Strategy (2008)

Royston Town Centre Strategy is a supplementary planning document adopted in 2008 and setting out Councils' vision and aims for town centre for the next 15 years. It set out vision and key aims for the Royston Town centre to be identified as a vibrant heart. Seven opportunity sites were identified as potential locations with a scope to address some of the main issues facing the town centre and could seek to transform and support the vision.

The table below and accompanying map summarise the town centre development or enhancement sites proposed in the 2008 Town Centre Strategy and other strategies, with note about improvements understood to have been achieved subsequently.

	Proposed town centre development/enhancement site	Strategy where proposed	Improvements undertaken?
1	The Civic Centre site, comprising the Health Centre, Town Hall, Police Station, and adjacent car park	Town Centre Strategy (Site RTC1) The Local Plan	no
2	The Royston Cross	Town Centre Strategy (Site RTC2) Conservation Area Statement Retail Study (2016)	Well maintained, though potential to enhance further
3	Angel Pavement located between High Street and Market Hill	Town Centre Strategy (Site RTC3) Retail Study (2016)	no
4	Corn Exchange, King Fisher House, public toilets, Market Place and Fish Hill car parking located on Market Hill	Town Centre Strategy (Site RTC4) Conservation Area Statement (2007) Royston Transport Strategy	no
5	The Warren Car Park located off Barkway Street	Town Centre Strategy (Site RTC6)	no
6	Fish Hill Square	Town Centre Strategy (Site RTC5) Conservation Area Statement	Completed with enhanced public realm
7	Princes Mews Car Park and the former Somerfield/Morrisons store located off Baldock Street	Conservation Area Statement (2007) Town Centre Strategy (Site RTC7) Retail Study (2016)	no


1
2
3
4
5
6
7
Opportunity Sites
Town Centre Boundary
RTC 1 Civic Centre
RTC 2 Royston Cross - End of Upper King Street
RTC 3 Angel Pavement
RTC 4 Market Place, Old Cattle Market Site and Corn Exchange
RTC 5 Warren Car Park
RTC 6 Fish Hill Square
RTC 7 Princes Mews East and West

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.

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.

North Hertfordshire Transport Strategy

This Transport Strategy supported the then emerging North Hertfordshire District Council (NHDC) Local Plan.

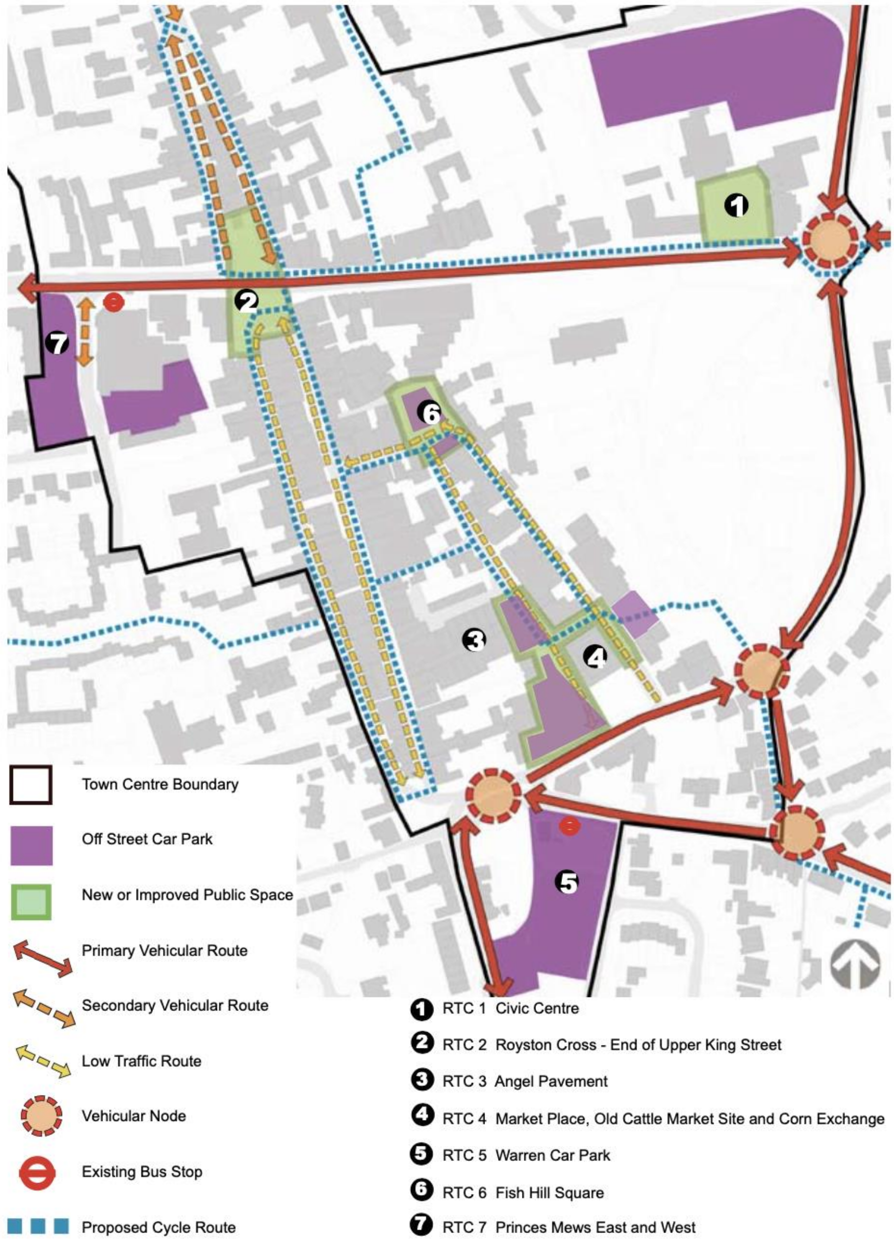
Royston Transport Strategy

The transport strategy identifies Royston as a town affected by the high influx of commuter demand from surrounding villages. This is partially a result of the location of the town, with more than a half of commutes to destinations outside of North Hertfordshire area. The roads within Royston are described as generally broadly within the capacity, with some delays within the town in the evening peak hours.

The Strategy sets-out strategic elements and measures to be undertaken:

- *Behaviour change* – encourage shift to Sustainable Travel
- *Key development sites* – ensure linkage and choice of bus, walking or cycling as preferred travel options
- *Improving walking and cycling* – improved crossings, signage and longer-term increased pedestrianisation of the town centre
- *Bus-based improvements* – better coverage of in and out of town centre bus services, better interchange and more frequent services to Baldock and Stevenage
- *Sustainable spine* – improved bus frequency, better walking and cycling facilities, More and better crossings of main roads, particularly the Great North Road, A10 and Baldock/Melbourn Road.
- *Traffic management* – 20mph across the town, improvements at the focus junctions and long-term relief to the routes on south-west of the town

To support this, Royston Town Centre Strategy highlighted that in-line with best practice nationally and elsewhere in the District, through traffic is directed onto local distributor roads outside of the main town centre shopping areas. Some of the town centre roads, such as Fish Hill and Market Hill, are indicated as the ones with heavy traffic activity, that while allowing adequate access to the town centre businesses, interrupt and detract from the appearance, amenity of the town centre and ease of pedestrian movements. The reduction of traffic in the town centre would be specifically beneficial around opportunity site RTC6 – Fish Hill. The Town Centre Strategy also allocated policy guidance to support partnership between bus operators and Hertfordshire County Council to bring improvements to town bus services and increase the numbers of passengers accessing the town centre. The strategy also highlighted, that there is a potential to bring improvements to public realm in the medium and long-term by a reduction in the overall level of car park provision, however a process of continuing review should be undertaken to reflect that change.



Some further focus on the parking and traffic management can be seen in the projects and actions proposed by the Royston First BID to be undertaken in the next 5 years:

- One-hour free parking via scratch cards and the “free-after-3”
- Investigate and deliver a park and ride system for industrial estate workers – potentially from the new multi-storey car park and/or off-site car parks created outside the town boundary
- Free to use dockless community bikes to be made available across the industrial estates and throughout the town

- Reinstate the shuttle bus to run between the gateway superstores, the adjacent industrial estate and town centre
- Assist the District Council with the trial and implementation of pay-on-exit car parks
- Work with the District Council on the potential introduction of an employee parking season ticket

Royston has been selected as pilot as part of the Hertfordshire Sustainable Travel Towns programme. These promises an innovative approach to reshaping the local highway network and places, in line with the sustainable transport objectives set out in the Local Transport Plan.

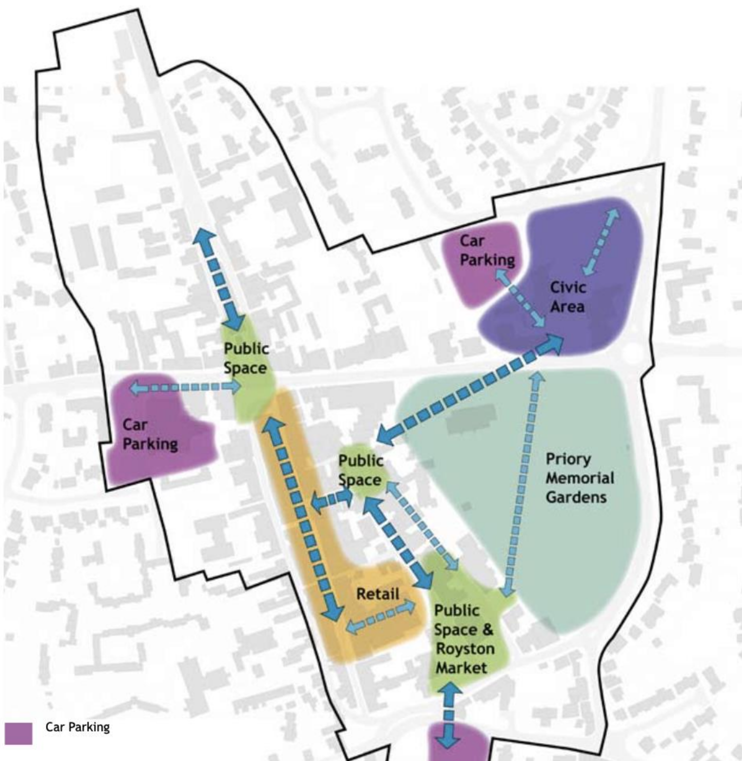
Sustainable Travel Towns (STTs) will benefit from a package of measures that will achieve a significant switch to walking, cycling and public transport. The overall outcome will be that a STT will feel considerably different to the current conditions in the town. The general perception to all highway users will be that pedestrians, cyclists and public transport users will have a greater priority than they do at present, leading to a higher level of natural enforcement and behavioural change. There will also be a need to be significant "sticks" along with the "carrots" to deliver these sustainable travel objectives. These are likely to include reduced parking standards in new developments and tighter restrictions on parking on existing highways, as well as changes to traffic signal priorities and highway space reallocations. It will be important that there is close coordination between the development and delivery of the Royston STT and wider town centre revitalisation.

Streetscape and public realm

The Royston Town Centre Strategy referred to the detailed urban design assessment for Royston that was carried out in July 2007 as an analysis of the key characteristics and opportunities of the streetscape. The Strategy also involved in-depth townscape analysis of sites located around the proposed opportunity areas and suggested possible pedestrian linkages, as the diagram opposite summarises. In addition to the analysis, it presented a concept plan of what character could be applied to each of these areas. Such an understanding and approach, still remains relevant and should be reviewed as part of updated the town centre strategy.

Proposed BID activities in relation to public realm are:

- Christmas lights and seasonal window dressing
- Night-time illumination /animation of major / historical building facades or other landmarks
- Use town's parks much more often to stage major events



- Encourage more local commuters to stay in Royston and explore the town

Conservation Area Statement (2007)

The Royston Conservation Area statement highlighted the significance of the historic qualities of the town centre, such as its medieval street layout, market places and sites of archaeological and historic interests. The document described later developments as adequate, meeting historic qualities in its built form and materials. It also refers to the Royston Shop Front Design Guide (1998), pointing out the significance of historic shop fronts in buildings close to the Cross and particularly along the High Street. It also identified the concentration of public buildings in Fish Hill and Market Hill, and in Kneesworth Street and Melbourn Street.

When speaking about negative features, the statement pointed out opportunities for re-surfacing schemes, using adequate materials for road and pavement surfaces. It also highlighted opportunities to unify street furniture, shop signage and other elements of public realm.

Other sites and areas located within the Town Centre that are identified as redevelopment opportunities with particular focus on public realm, are:

Former Morrisons (former Somerfield) Baldock Street. This a building of considerable bulk and massing occupying a prominent corner site when approaching the conservation area from the west. Although the building addresses the corner, it does not make a positive contribution to the character and appearance of the Conservation Area.

The Warren Car Park, Bus Station and Public Toilets. This area is considered to be a good improvement opportunity taking into account the fact that the car park is defined by reconstituted stone retaining walls, grey coloured crash barriers and railings nearby, the area is predominantly tarmac surfaced, and the bus station/public toilets building is of no architectural merit. The forecourt to the bus station is rather cluttered with signs and other street furniture.

Southern end of Upper King Street and High Street. The number of service boxes, street furniture and road signage in this area is beginning to detract from the setting of nearby listed buildings and the character and appearance of the conservation area.

Fish Hill, Market Hill and Market Place car parks. The car park adjacent to the Corn Exchange has a large mixture of surfacing materials, the overall appearance of which is visually disappointing. The mixed types, condition and random positioning of bollards and railings have a similar affect. In addition, car parks are situated at the bottom of Fish Hill and along Market Hill where the street widens into the Market Place. Generally, this whole area could be improved by unifying surface finishes and considering alternatives to the existing yellow/white lining.

King Fisher House and adjacent car park and public toilets, Fish Hill. The resurfacing of the adjacent car park would be an improvement and the public toilets are proposed to be demolished and replaced with new public conveniences

Business Support

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

Royston First BID Business Plan (2019 – 2024) and Priority Projects

The Royston First Business Improvement District (BID) was established in 2003 and covers the town centre and industrial estate areas. The BID is a business-led and body formed to improve and sustain commercial activity.

Royston BID reports that it has to-date delivered a number of projects that provide direct support to businesses:

- *Town and industrial estate benefits:* Royston Bid has supported the provision of services such as a shuttle bus and improved police patrol, as well as working on digital services and marketing, providing welcome packs to new businesses, improving the current town website.
- *Town centre promotions*: With the focus on promoting the town, BID has conducted annual footfall surveys, initiated appearance of pop-up shops, improved provision and accessibility of information for town centre visitors and undertook projects together with Royston Picture Palace.
- *Enhancements to the retail environment:* To enhance retail environment through improving the appearance of the town centre, the BID has worked on installation of decorations, cleanliness and support of the local market.

The BIDs' Priority Projects plan contains details of proposed activities aimed at support local business activity:

- printed guide to every consumer-facing business in Royston listed by trade and distributed to 15,000 households annually
- on-going support for the library (via the Royston Information Centre), the market and the cinema
- regularly showcasing some of the industrial estate's creative companies and the diverse product ranges in the town centre
- produce a detailed plan as a contingency should a large store become vacant in the High Street for an extended period

Place branding and marketing

Promotion and marketing are addressed in the Royston Town Centre Strategy as a tool to strengthen the town centre's identity. The proposed promotional activity focused on Royston's historic and market town characteristics and enhancing this identity.

Across Royston BID's proposed list of actions, the following target promotion and marketing of the town centre:

- town trails and events programme
- "Discover Royston" distributed through the information centre

- run a local beer, wine and cheese food festival

The BID's proposals also specifically focused on communication projects, including:

- employ new communications / business development methods to improve business liaison and networking while supporting town centre marketing activities
- working with major businesses such as the local pubs and hotels to more effectively promote themselves, their events and consequently the town
- make more events based on attractions at local venues
- oversee targeted social media campaigns to promote aspects of the commercial scene to a local audience

Digital technology and data

Town centre Wi-Fi and footfall monitoring

North Hers Council has recently adopted a new mobile phone-based footfall monitoring system for Royston 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 Royston 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.

Social media and digital footprint

There is no specific social media or digital strategy for Royston though it is a recognised objective of Royston BID's priority projects plan, that aims to improve existing town-centre website and oversee targeted social media campaigns to promote aspects of the commercial scene to local audience.

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

- Royston First on Instagram (@roystonfirst) ran by Royston BID and https://www.roystontown.uk

There is also one private, community Facebook page aimed on businesses offering services in Royston and surrounding area with 1,500 members. Whilst each of these sites serves slightly different audiences and organisational roles, it is important to coordinate and clarify the town's digital footprint.

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. Royston with 142 units is classed as a small town and will be compared against data for small 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.

The Reports

The baseline report provides statistical analysis of each of the KPI's. Individual towns are encouraged to add their own commentary using local knowledge to provide specific explanations. The reports are used by a variety of key stakeholders such as local authorities, town and parish councils, local partnerships, town teams, business associations, BIDs, neighbourhood plan groups to help:

- provide baseline data to understand individual town centres issues
- identify strengths, weaknesses, and opportunities for improvement
- assist in preparing local action plans to address identified issues
- monitor impact of local town centre regeneration over several years
- benchmark towns clusters and share good practice
- act as an evidence base for funding applications

Before any KPI data is collected the core commercial area of the town centre is defined. The town centre area includes the core shopping streets and adjacent car parks.

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 provided via NHC & 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 142 occupied units recorded. The business composition 'dashboard' overleaf also provides a visual 'snapshot' of the make-up of businesses in Royston 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.

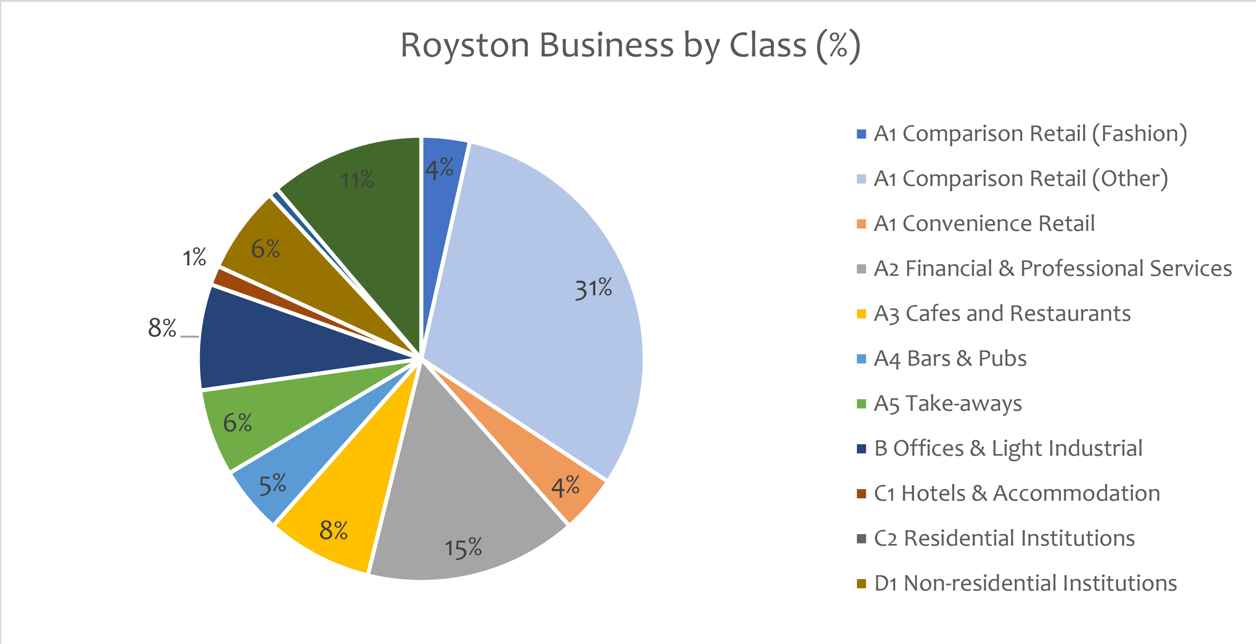
The new use classes are: a broad Class E (commercial, business and service), Class F1 (learning and non-residential institutions) and Class F2 (local community). Shops fall into Class E or Class F2 depending on their use, size and location. This change is important in shaping the potential mix of town 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.

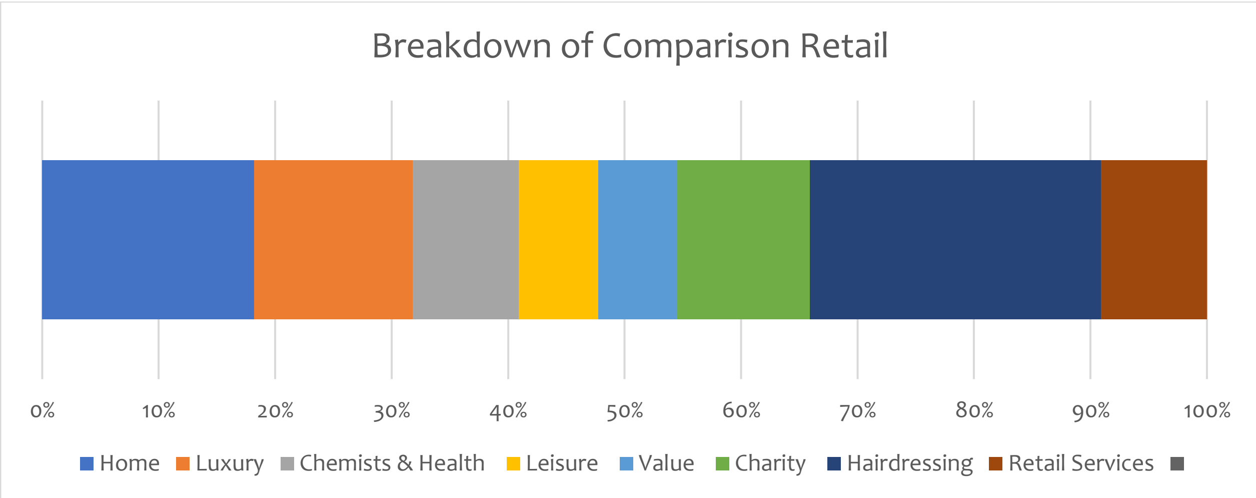
Full details of the changes including the full list of the new use classes and their previous equivalents are provided in People & Places downloadable guide to changing the town centre business mix.

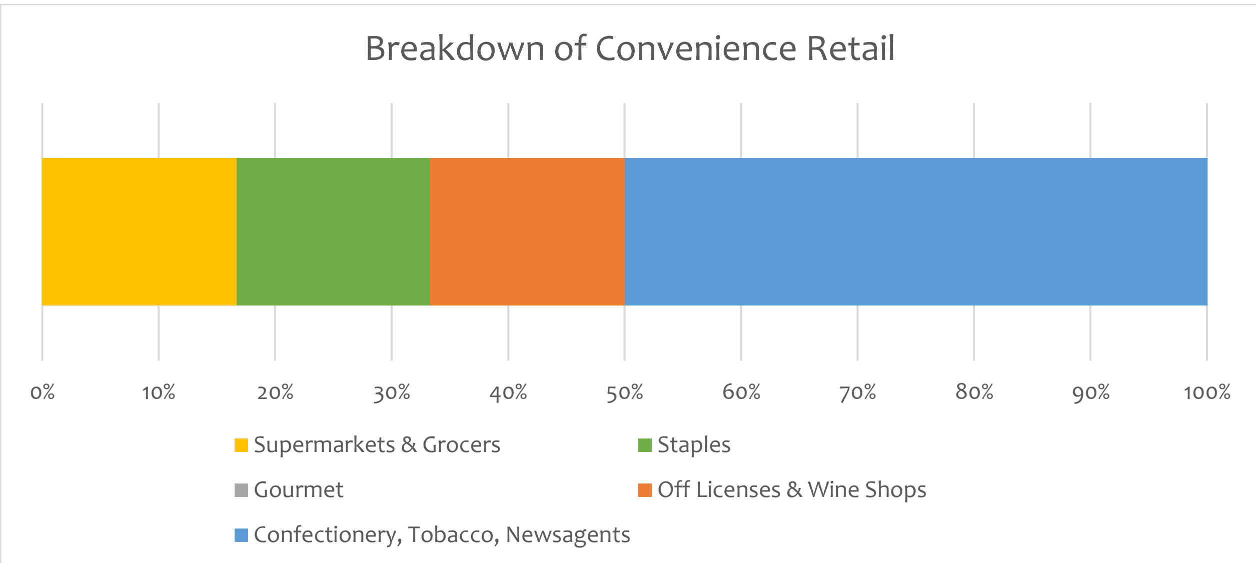
Class	Type of Use	Description
A1	Shops	Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes
A2	Financial and Professional Services	Financial 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.

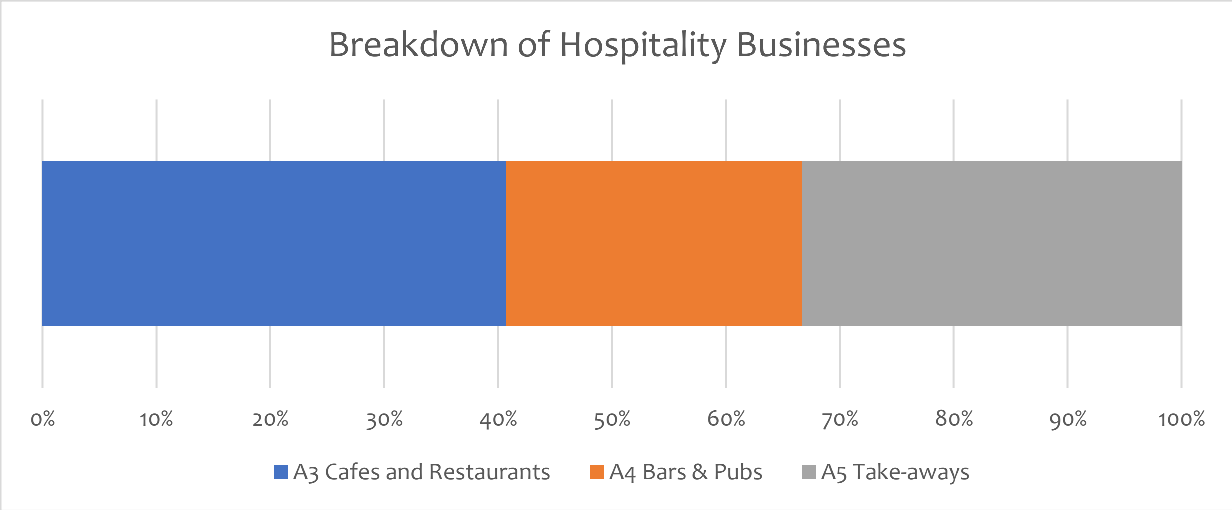
Level 1 & 2 classification	National Small Towns %	Royston (number)	Royston %
A1 Retail	**51%**	**56**	**39%**
A1 Comparison Retail	**42%**	**50**	**35%**
Comparison (Fashion)	**6%**	6	**4%**
Fashion & Clothing (children)	0%	0	0%
Fashion & Clothing (men)	0%	1	<1%
Fashion & Clothing (mixed)	3%	1	1%
Fashion & Clothing (women)	3%	3	2%
Footwear	0%	0	0%
Fashion & General Clothing Accessories	0%	1	<1%
Other Comparison Retail	**36%**	**44**	**31%**
Department Stores	0%	0	0%
Home	7%	8	6%
Luxury	10%	6	4%
Chemists & Health	3%	4	3%
Leisure	3%	3	2%
Value	0%	3	2%
Charity	5%	5	4%
Hairdressing	6%	11	8%
Retail Services	1%	4	3%
A1 Convenience Retail	**9%**	**6**	**4%**
Supermarkets & Groceries	2%	1	<1%
Staples	2%	1	<1%
Gourmet	2%	0	0%
Off Licenses	0%	1	<1%
Confectionery & Newsagents	3%	3	2%
A2 Financial & Professional Services	**9%**	**22**	**16%**
Banks & Building Societies	2%	3	2%
Estate Agents & Auctioneers	3%	8	6%
Professional Services	4%	11	8%
Repair Services	1%	0	0%
A3 Cafes and Restaurants	**9%**	**11**	**8%**
A4 Bars & Pubs	**4%**	**7**	**5%**

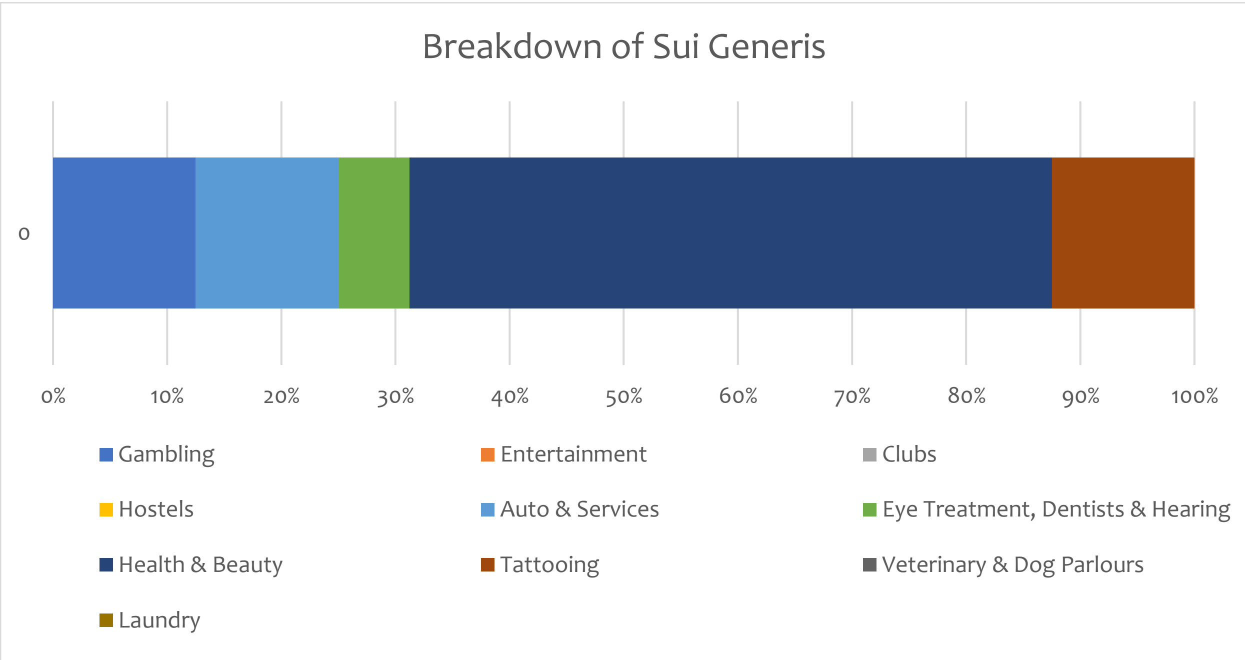
A5 Take-aways	**4%**	**9**	**6%**
B1 Offices	**2%**	**9**	**6%**
B2 Light Industrial	**1%**	**2**	**1%**
C1 Hotels & Accommodation	**1%**	**2**	**1%**
D1 Non-residential Institutions	**1%**	**9**	**6%**
Medical	2%	2	1%
Civic Buildings	3%	4	3%
Education & Learning	1%	2	1%
Places of Worship	2%	1	1%
D2 Assembly and Leisure	**1%**	**1**	**1%**
Sui Generis	**9%**	**16**	**11%**
Leisure	**1%**	**2**	**1%**
Gambling	0%	2	1%
Entertainment (theatre & concert halls)	0%	0	0%
Clubs	0%	0	0%
Hostels	0%	0	0%
Auto & Services	**3%**	**2**	**1%**
Personal	**6%**	**12**	**9%**
Eye Treatment; Dentists & Hearing	1%	1	1%
Health & Beauty	2%	9	6%
Tattooing	1%	2	1%
Veterinary & Pet Grooming	1%	0	0%
Laundry	1%	0	0%
TOTALS	**100%**	**142**	**100%**


Royston Business by Class (%)
4%
31%
4%
15%
8%
5%
6%
8%
1%
6%
11%
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


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


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





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 are 6 businesses in Royston that offer fashion retail (4% of the total business mix). Out of these, 1 outlet offers men clothing, 1 mixed, 3 female fashion and 1 general clothing accessories. There is no offer for footwear or children's fashion. This proportion of fashion retail in Royston is slightly lower than small town business mix benchmarked nationally. It indicates that Royston serves some fashion needs though residents will probably need to go elsewhere to meet all their requirements.

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 that 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 store 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, Royston's comparison retail (apart from fashion) takes 31% of total business mix. This is less than the national average (42%). The number is comprised of 11 hairdressers and barbers (12%), 8 outlets selling items for home such as electric goods, furniture, florists and interior items (6%), 6 business selling more luxury items (4%), 5 charity shops (4%), 4 chemists and health shops (3%), 3 shops dedicated to leisure and hobbies (2%), and 4 outlets providing other retail services (3%).

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 as butchers, bakers, greengrocers are very important parts of the retail mix and help encourage regular, local footfall. They typically 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 create 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 shops and newsagents are consistently a small part of the retail mix in a vibrant town centre.

There are 6 convenience retailers in Royston town centre, with 1 of those (0.7% of the total business mix) falling in staples category, 1 Tesco supermarket (0.7%), 1 off licence (0.7%) and 3 confectionary and newsagents (2%). Royston unfortunately suffered the closure of its town centre Morrisons store in autumn 2020. The proportion of convenience retail in Royston is smaller than that benchmarked across the small towns nationally.

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 are 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.

Royston town centre has a good proportion of financial and professional services (16% of the total business mix) which is significantly higher than the average benchmarked across small towns nationally (9%). The number is comprised of 11 professional and service businesses (8%), 8 estate agents (6%) and 3 banks and building societies (2%).

Food and drink

Taken collectively, food and drink establishments are important parts of the town centre business mix that can help to 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, encouraging footfall and dwell-times. Along with restaurants, a mix of appealing cafes will be very important in encouraging day-visitors and tourists to the town centre. A mix of suitable restaurants will be key in underpinning a flourishing evening economy for different local markets and visitors.

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

Royston is sufficiently served with hospitality business mix. There are 11 cafes and restaurants (8%), 9 bars and pubs (6%) and 9 take aways (6%). This proportion is representative of the national average which indicates that Royston meets its social function well.

Offices, light industrial and storage

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. These various business types 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.

Royston’s proportion of town centre offices and light industrial (8%) is significantly higher than the typical proportion of small national towns (2%) indicating additional flow of daily users contributing to the number of the town centre customers.

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 hotels in Royston town centre (1% of the overall business mix) indicating that town serves some external visitors or business travellers.

Residential institutions (care)

Institutions such as care homes and hospitals provide local social services and can contribute to 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 part 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 the 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 and can serve as community facilities for wider population and attract visitors.

There are 9 non-residential institutions in Royston (6%), out of which 4 are civic buildings (3%), 2 medical buildings (1%), 2 education and learning establishments (1%) and 1 town centre place of worship (0.7%).

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.

There is 1 assembly and leisure establishment in Royston which is representative of small towns nationally and indicates local demand has to be largely met elsewhere.

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 and larger-sized 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.

Sui Generis uses make up 11% of town centre businesses. The diversity is comprised of high number of personal care businesses such as 9 (6%) health and beauty outlets, 2 tattoo parlours (1%) and 1 eye and dental treatment (0.7%). Further, there are 2 gambling outlets (1%) in the town centre.

Overview

The business data for Royston indicates that the current retail focus is on the provision of comparison retail such as items for personal care, home and luxury. The proportion of convenience retail businesses is low, taking up only 4% of the total business mix, with now only a small Tesco Express supermarket within the town centre. The provision of financial and professional services is good, higher than national average, indicating that these residents' needs are well catered for.

The proportion of hospitality mix is considered as a good for a town of its size, providing a sufficient offer for residents with 7% of cafes and restaurants, 5% bars and pubs, and 6% of take-aways.

Levels of Sui Generis are higher when compared to other smaller towns and indicate presence of diverse service, majorly those for personal care.

Overall, the Royston town centre business mix is only partly suited to meet basic everyday shopping needs of residents including some food staples, personal care and professional services. It caters well for the local social life with a diverse hospitality offer. On balance, the data indicates that town's focus is on its local customers rather than external visitors.

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 for 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.

Examining the retail mix specifically reveals that the proportion of comparison retail (89%) in Royston is significantly greater than convenience. It is also slightly higher than the proportion benchmarked across small towns nationally. Slight increases 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.

	National Small Towns %	Royston (number)	Royston %
Comparison	82%	50	89%
Convenience	18%	6	11%

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 figure 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	Topman/ Topshop
Sainsbury's	Superdrug	Burton
Tesco	Clarks	Next
Waitrose	Clintons	Zara
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 Small Towns %	Royston (number)	Royston %
Key attractor	6%	3	5%
Multiple	20%	9	16%
Regional	9%	3	5%
Independent	66%	40	73%

The data for Royston indicates that there are 3 key attractors in the town centre – Tesco Express, WHSmith and Boots. Across the rest of the businesses, 73% are independent shops, with another 21% under regional or multiple ownership. The number of independent shops is slightly higher than the average across small towns nationally.

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 Small Towns %	Royston (number)	Royston %
Vacancy %	9%	8	5%

The vacancy data for Royston indicates that out of 150 total town centre units, 8 are unoccupied (5%), making it lower than the level for benchmarked small towns nationally (9%). This indicates that available premises are being used moderately well and that only limited expansion of retail can be performed by reoccupation of vacant units.

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 made during the pandemic serve to add to the importance of understanding 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 is ideal. At the same time, 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 that 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 data was not collected as part of this survey. In the table below, the data is broken down into the following categories:

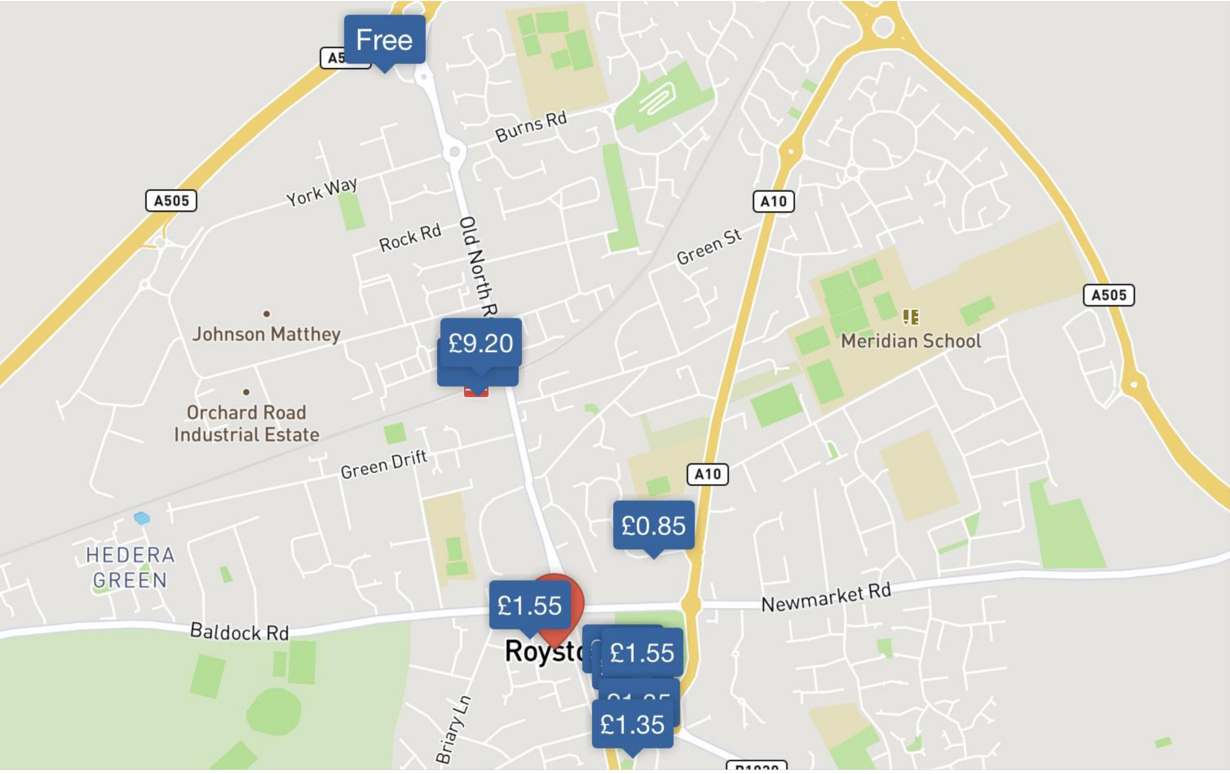
- Percentage and number of spaces in designated car parks
- Percentage and number of short-stay and long-stay

The Initial data collected for 2 private car parks and 7 public car parks serving Royston town centre shows that there are a total of 920 spaces. Most of the car park spaces are available on a long-stay basis (92%). Of these, 355 are in public car parks and can be used for both short and long stay.

A further 480 spaces are available in a peripheral site at Tesco Extra supermarket located to the north of the town centre. These car parks cater largely for their own users, on a short-stay customers only basis.

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

	Royston (number)	Royston %
Car parks		
Total spaces:	920	100%
Short stay spaces (<4 hours)	70	8%
Long stay spaces (>4 hours)	850	92%



Car park location	Short-stay	Long-stay	Total	Cost for 1 hr	Cost for 4 hrs	Walk to town centre	Notes
Town centre parking							
Civic Centre	0	226	226	£ 0.60	£ 1.75	9 mins	Short & long-stay
Princes Mews	0	91	91	£ 0.70	£ 5.75	2 mins	Short & long-stay
Angel Pavement	25	0	25	£ 0.60	n/a	5 mins	Short stay (3hr max)
Priory Gardens	12	0	12	£ 0.60	n/a	6 mins	Short stay (3hr max)
Market Place	33	0	33	£ 0.60	n/a	6 mins	Short stay (3hr max)
The Lower Warren	0	19	19	£ 0.60	£ 2.45	8 mins	Short & long-stay
The Upper Warren	0	19	19	£ 0.60	£ 2.45	9 mins	Short & long-stay
Royston Station	0	145	145	£ 3.90	£ 9.20	15 mins	Short & long-stay
Royston Station	0	350	350	£ 3.90	£ 9.20	15 mins	Short & long-stay
Totals	**70**	**850**	**920**				
Peripheral parking (>15 mins)							
Tesco	480	0	480	Free	n/a	39 mins	Customers (2 hr max)

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 Royston. The following percentage figures are based on the 30 returned business confidence surveys from a total of 142 town centre businesses and organisations. This is a return rate of 21% compared to 25% nationally, suggesting a high level of interest within the town's business community. It is also indicative of a high percentage of independent retailers that are often owner-managed and more engaged in partnership working.

Nature of business	Royston business types surveyed (no.)	Royston business types surveyed (%)
What type of business or organisation are you?		
Shop	8	27%
Retail service	6	20%
Professional/financial services	4	13%
Hospitality	3	10%
Public, religious or civic building	1	3%
Office	2	7%
Light manufacturing, distribution	4	13%
Other	2	7%
What type of ownership does the business have?		
National multiple business	6	20%
Regional multiple business	2	7%
Independent business or organisation	22	73%

Business background	National Small Towns 2022 %	Royston (number)	Royston %
How long has your business been in the town?			
Less than a year	7%	2	7%
One to five years	21%	2	7%
Six to ten years	14%	4	13%
More than ten years	58%	22	73%

Of the businesses that responded to the survey, 47% were shops or retail services of some kind, and 10% were hospitality businesses. Unusually, for a survey of this nature, 20% were offices, light manufacturing or distribution though this is because the survey was distributed to all BID members including those on industrial estates. 73% of these respondents were independent businesses.

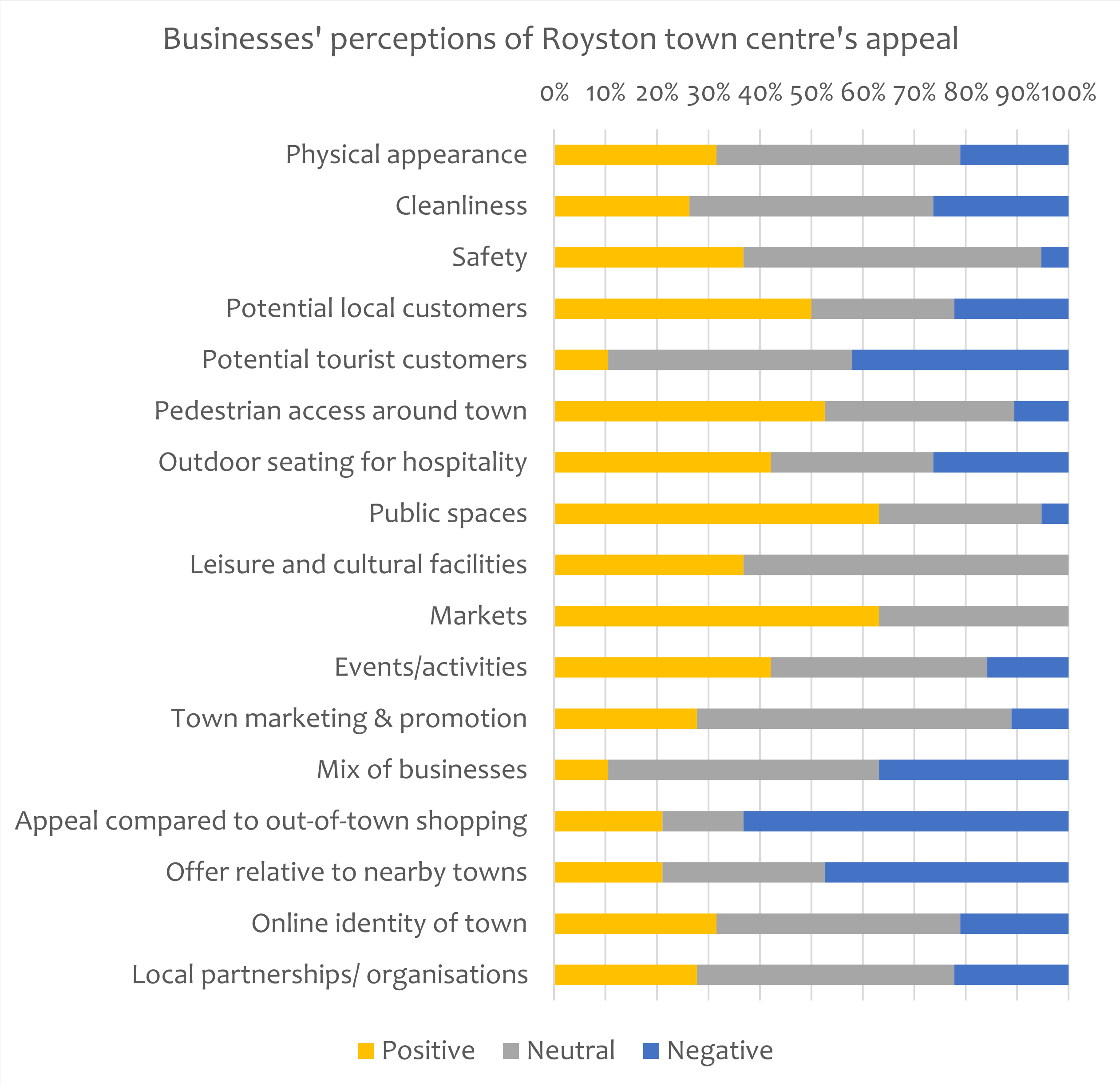
A total of 86% of these businesses are long-established in Royston, having been based there for at least six years. This compares to 72% of businesses in benchmarked towns nationally. The fact that 7% of Royston businesses surveyed had been established for less than a year indicates a normal turnover in the town's traders, compared to benchmarked towns.

Business' perceptions of the town centre

Royston town centre businesses were first asked about their perceptions of the town centre's appeal. From the responses to the survey, businesses appear the most positive about town's markets (63%) and public spaces (63%). Pedestrian access around town (53%) and potential of local customers (50%) were also valued well. Responses showed quite a high level of indifference to lots of aspects, but particularly towards leisure and cultural facilities (63%), town's marketing and promotion (61%), safety (58%), mix of businesses (53%) and local partnerships (50%).

Positive, neutral or negative aspects of the town centre's appeal	**National Small Towns 2022 %**			**Royston %**		
	Positive	**Neutral**	**Negative**	**Positive**	**Neutral**	**Negative**
Physical appearance	55%	31%	14%	32%	47%	21%
Cleanliness	-	-	-	26%	47%	26%
Safety	-	-	-	37%	58%	5%
Potential local customers	37%	53%	10%	50%	28%	22%
Potential tourist customers	77%	19%	4%	11%	47%	42%
Pedestrian access around town	-	-	-	53%	37%	11%
Outdoor seating for hospitality	-	-	-	42%	32%	26%
Public spaces	-	-	-	63%	32%	5%
Leisure and cultural facilities	-	-	-	37%	63%	0%
Markets	14%	76%	10%	63%	37%	0%
Events/activities	-	-	-	42%	42%	16%
Town marketing & promotion	-	-	-	28%	61%	11%
Mix of businesses	-	-	-	11%	53%	37%
Appeal compared to out-of-town shopping	-	-	-	21%	16%	63%
Offer relative to nearby towns	-	-	-	21%	32%	47%
Online identity of town	-	-	-	32%	47%	21%
Local partnerships/organisations	-	-	-	28%	50%	22%

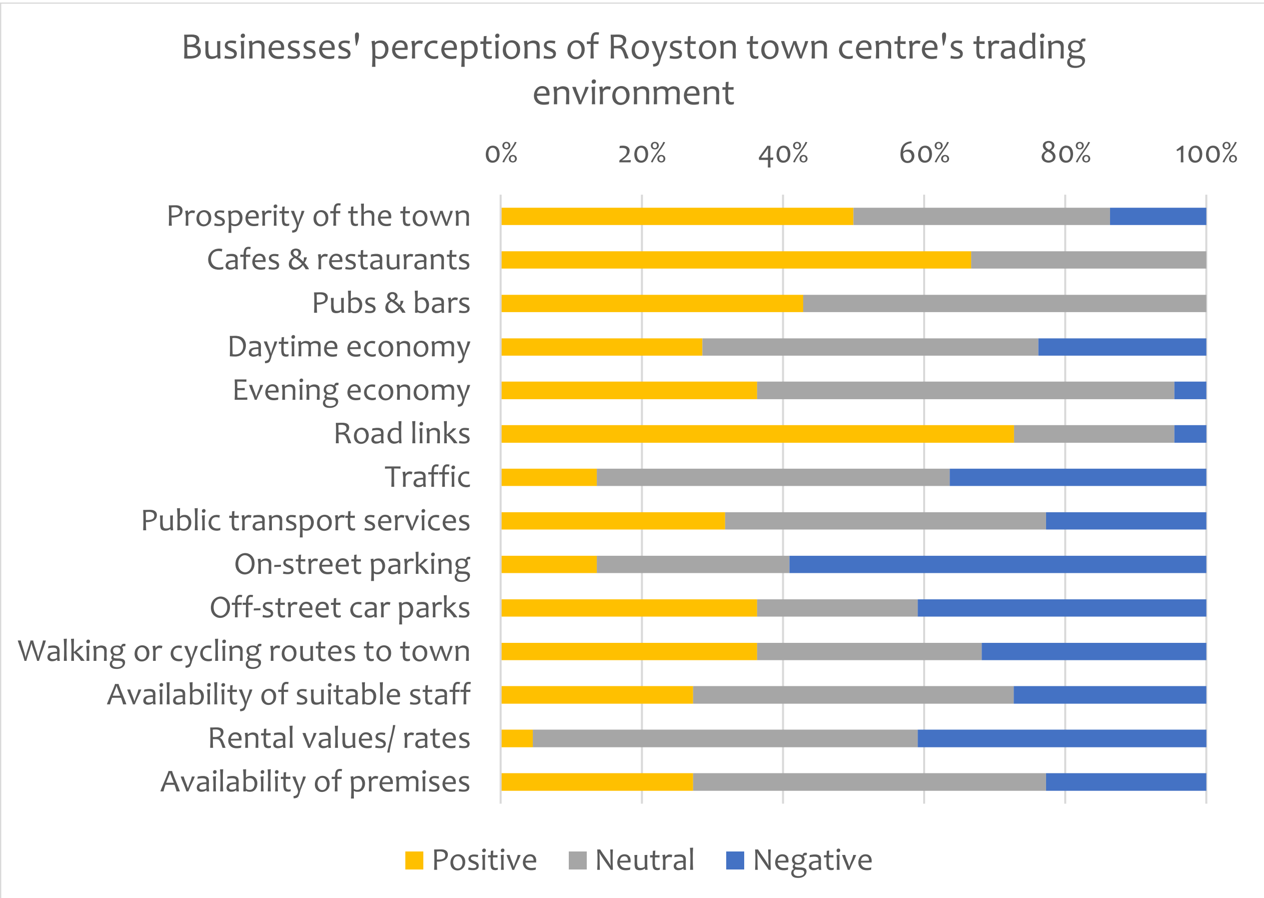
In terms of negative sentiments, businesses appeared to be the most dissatisfied with Royston's appeal when compared to out-of town shopping (63%), offer relative to nearby towns (47%) and potential tourist customers (42%).

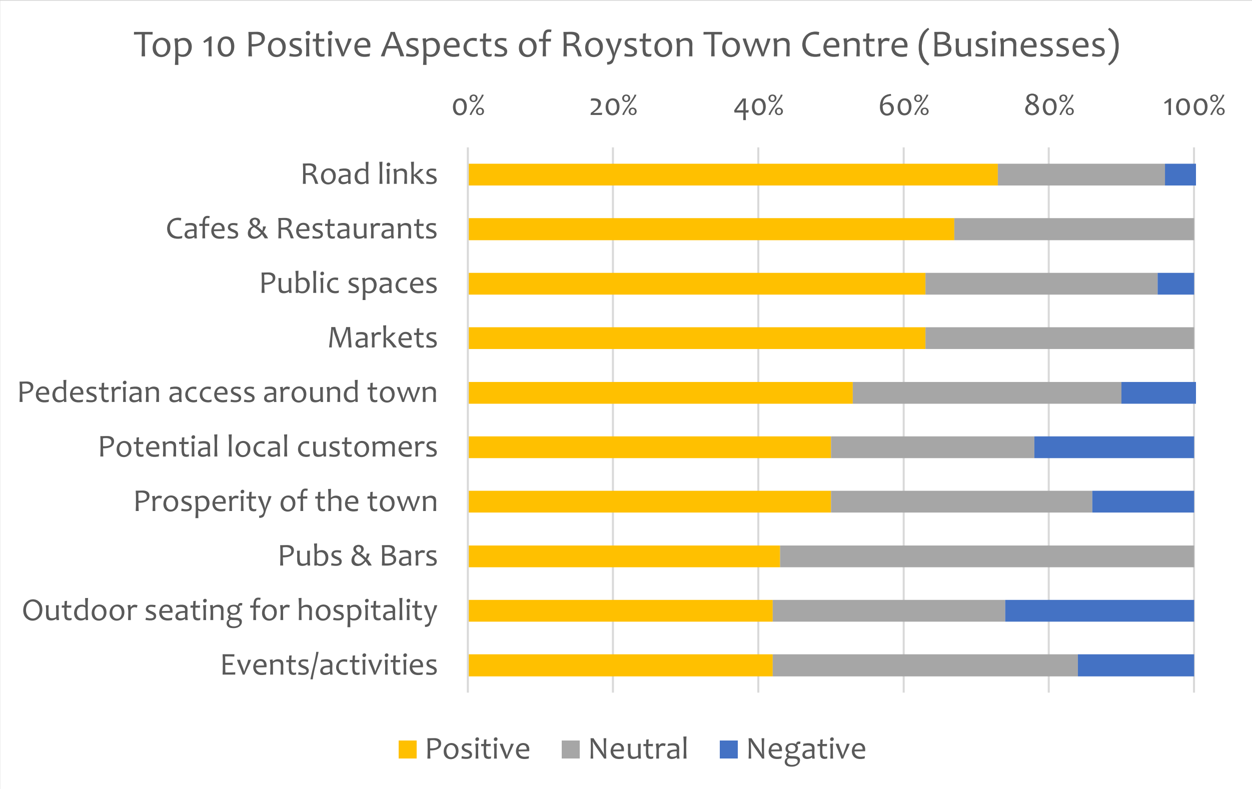


Subsequently businesses were asked about their perceptions of the town's trading environment. In this case, businesses appeared most positive about the road links to the town centre (73%), its cafes and restaurants (67%), public spaces (63%), markets (63%), pedestrian access around town (60%), cleanliness (59%) and potential for local customers (50%). They are also moderately positive the town centre's pubs and bars (43%), the outdoor seating for hospitality (42%) and its track record of organised events and activities (42%).

Businesses surveyed are most negative about the on-street parking (59%). They are also moderately negative about Royston's off-street parking (41%) and rental values/rates (41%).

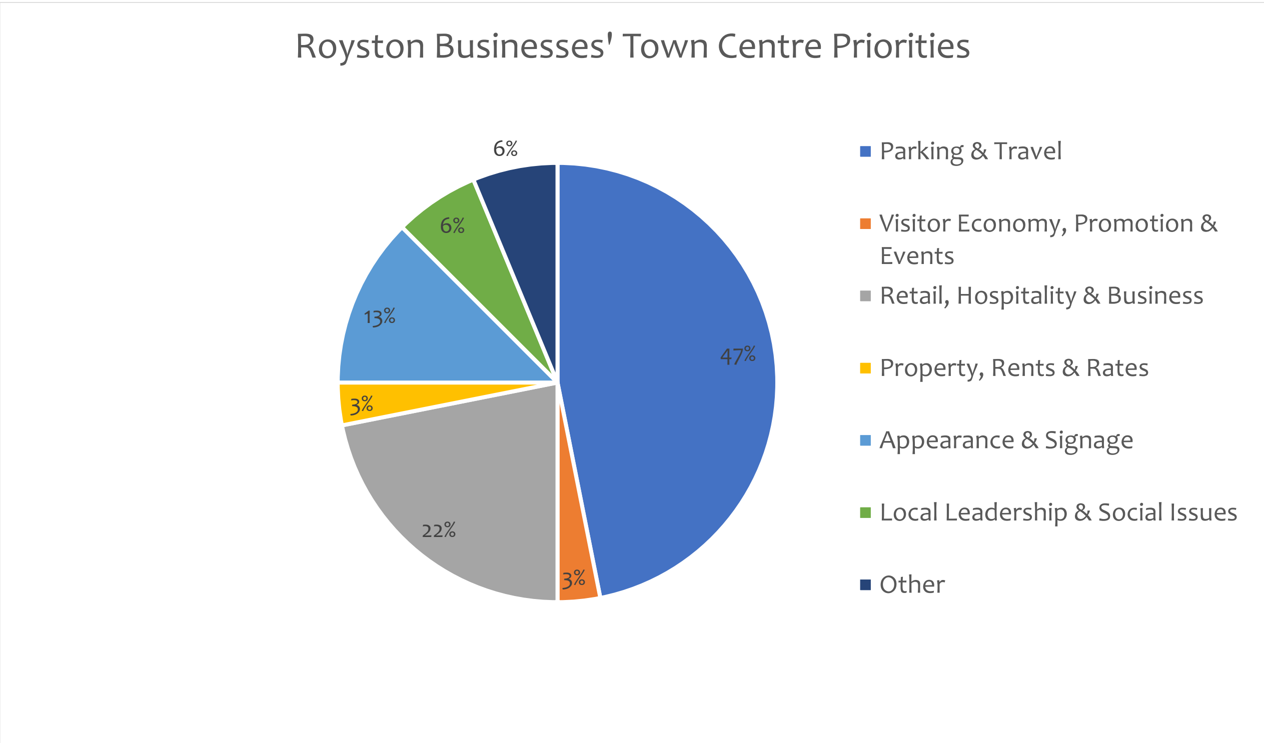
Positive, neutral or negative aspects of the town centre's trading environment	National Small Towns 2022 %			Royston %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Prosperity of the town	44%	38%	20%	50%	36%	14%
Cafes & restaurants	-	-	-	67%	33%	0%
Pubs & bars	-	-	-	43%	57%	0%
Daytime economy	-	-	-	29%	48%	24%
Evening economy	-	-	-	36%	59%	5%
Road links	40%	36%	14%	73%	23%	5%
Traffic	-	-	-	14%	50%	36%
Public transport services	-	-	-	32%	45%	23%
On-street parking	-	-	-	14%	27%	59%
Off-street car parks	-	-	-	36%	23%	41%
Walking or cycling routes to town	-	-	-	36%	32%	32%
Availability of suitable staff	11%	62%	17%	27%	45%	27%
Rental values/rates	-	-	-	5%	55%	41%
Availability of premises	-	-	-	27%	50%	23%

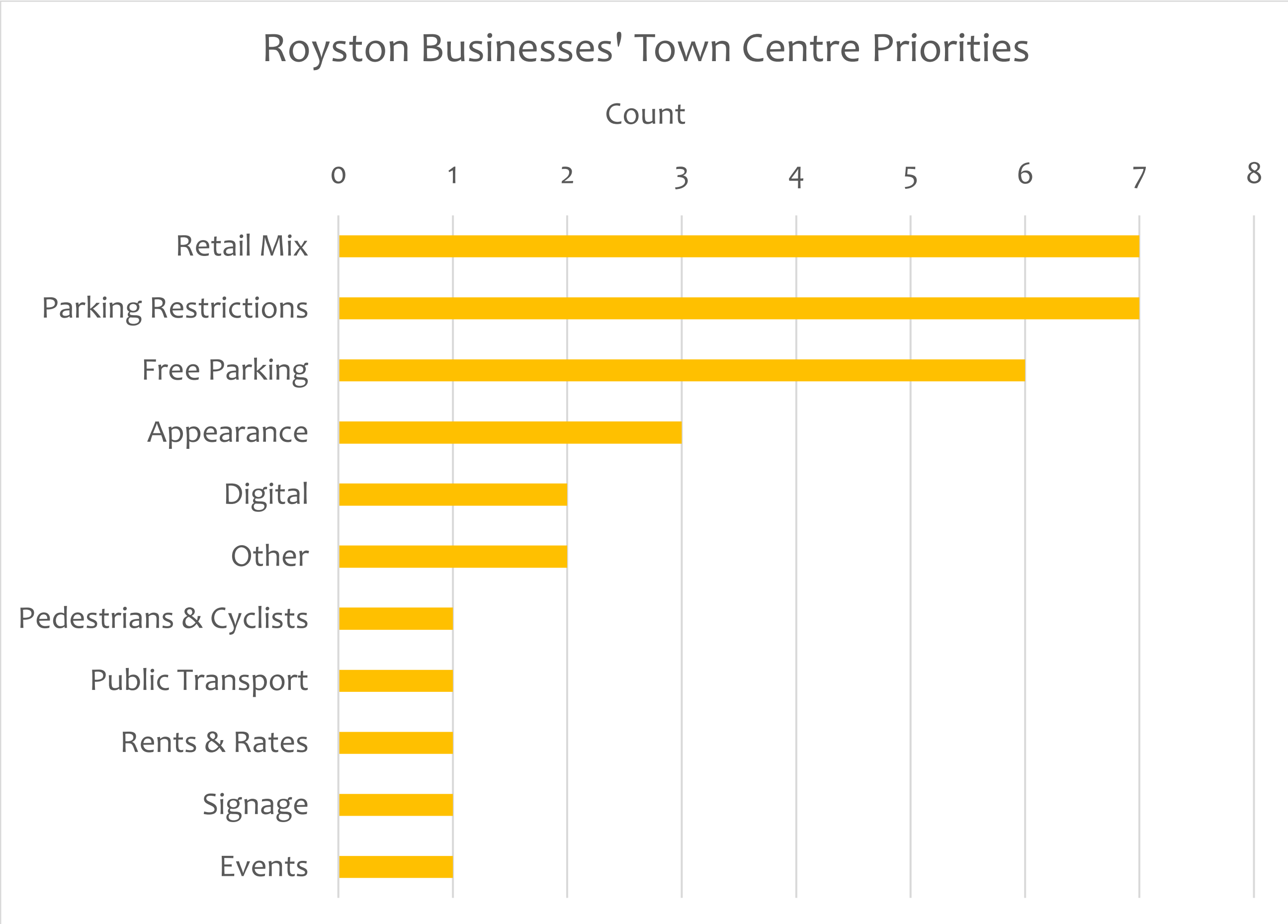




Business priorities for improving the town centre

When businesses in Royston were asked to propose two suggestions to improve the town centre, the top priority for businesses was parking and travel (47%). Within this, parking restrictions (22%) and free parking (19%) featured prominently. This was followed by priorities for improving the retail, hospitality and business mix (22%) and matters to do with the town's appearance and signage (13%).





Categories of Issue	Royston Responses (no.)	Royston Responses (%)
Parking & Travel	**15**	**47%**
Parking Restrictions	7	22%
Free Parking	6	19%
Pedestrians & Cyclists	1	3%
Public Transport	1	3%
Visitor Economy, Promotion & Events	**1**	**3%**
Events	1	3%
Retail, Hospitality & Business	**7**	**22%**
Retail Mix	7	22%
Property, Rents & Rates	**1**	**3%**
Rents & Rates	1	3%
Appearance & Signage	**4**	**13%**
Appearance	3	9%
Access & Signage	1	3%
Local Leadership & Social Issues	**2**	**6%**
Digital	2	6
Other	**2**	**6%**

The chart above categorises all of the comments received from town centre businesses, whilst below is a selection of key comments from each of the 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.

Parking & Travel (15)

Parking Restrictions (7)

- More parking
- On street parking restrictions will have a negative effect.
- Reduce car park charges - Lower rates for town centre workers on low wages
- More cost-effective parking for staff and visitors
- Market hill car park for 1 hour only
- Make the parking on the high street as it was before COVID and change the loading bay next to the shop on the corner back to parking.
- On street parking restrictions will have a negative effect.
- Take away the planters in the high street and re-introduce the parking spaces

Free Parking (6)

- Hour free parking for morning and afternoon
- Bring back High Street 20 min free parking.
- Free parking all day
- Free parking
- Free parking
- Some short-term free parking within the shopping areas

Other (Pedestrians & Cyclists and Public Transport– 2)

- Need to encourage more footfall
- Better/more frequent public transport

Retail, Hospitality & Business (7)

- Quicker banking options when paying cash in
- Quality/brands clothing shops to attract more customers
- More shops to promote footfall
- More variety of shops
- Different variety of shops
- (answered more as a visitor to the town than a business) places to buy fresh food – butchers
- No more charity shops

Appearance & Signage (4)

- Adequate signage for business - Royston-themed/branded
- Cleaner High Street
- Floral displays supported all year round
- Visible signage for what's on the industrial estate

Local Leadership & Social Issues (2)

- Online click and collect (answered more as a visitor to the town than a business)
- Not in town centre, but Orchard Road have no fibre optic broadband

Visitor Economy, Promotion & Events (1)

- More events like Letchworth Herts for the whole town centre on a Saturday

Property, Rents & Rates (1)

- Cheaper business rates

Other (2)

- Better meeting spaces
- more linked information between the town and the industrial area

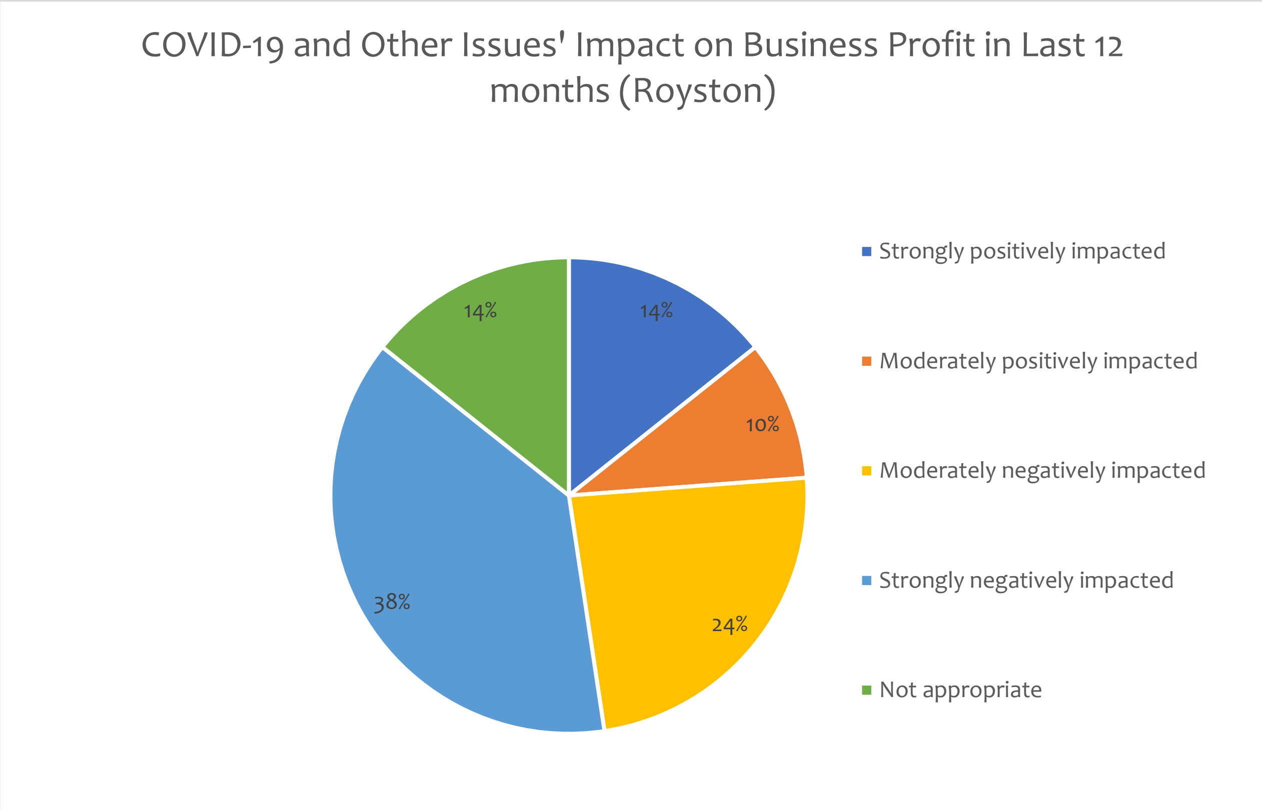
Business performance

Town centre businesses in Royston 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. Two specific questions were put forward and they were 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?

When asked about the projected impact on profits over the next 12 months from March 2022 when compared to pre-pandemic trading, 19% of businesses are moderately positive and 5% responded that they "strongly positive" that profits are likely to be better than those before the pandemic. In contrast, 24% of businesses expect a moderately negative impact on profit compared to pre-pandemic levels, and a further 24% expect this impact to be strongly negative.

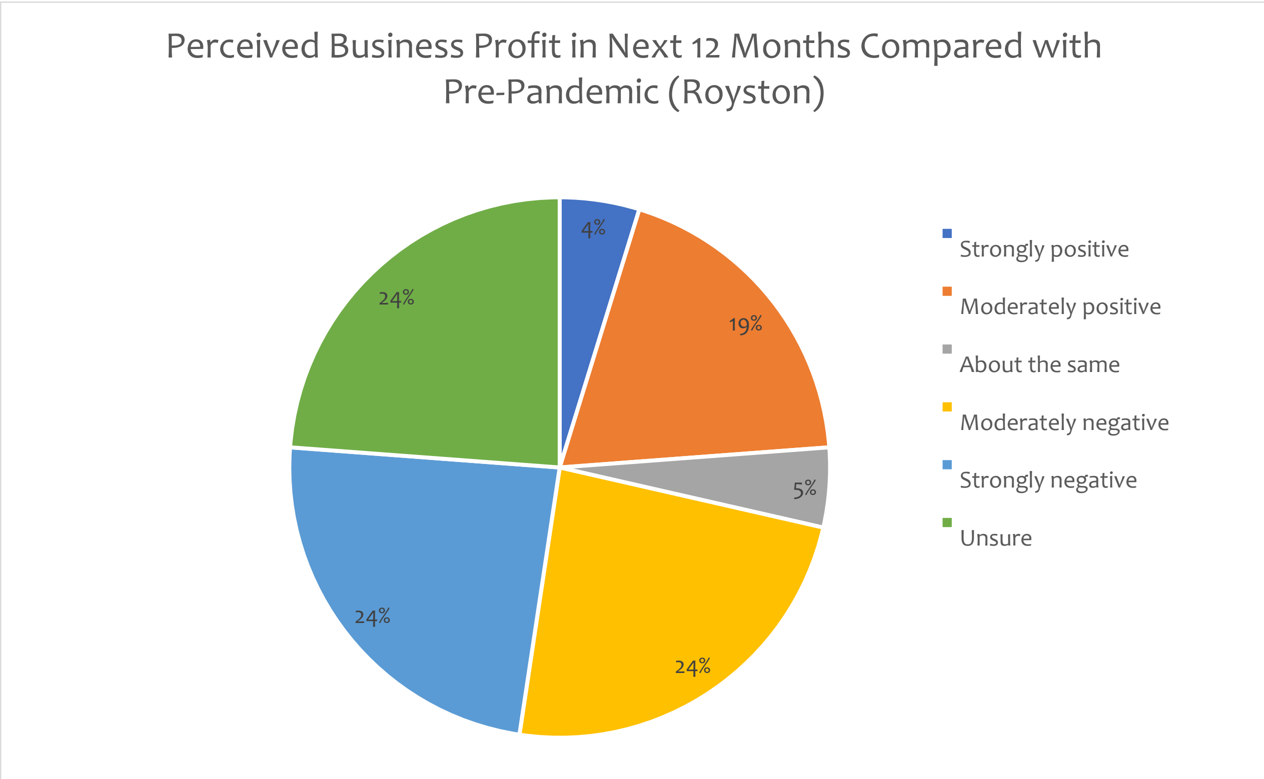
Compared to pre-pandemic levels, over the 12 months, how was your business' profit been impacted by COVID-19 and other issues?	Royston responses no.	Royston responses %
Strongly positively impacted	3	14%
Moderately positively impacted	2	10%
Not affected	0	0%
Moderately negatively impacted	5	24%
Strongly negatively impacted	8	38%
Not appropriate	3	14%



As the tables and charts above demonstrate, different businesses were impacted in different ways. Small numbers of businesses (10%) who responded said that the year of pandemic before December 2021 had a positive impact on profits with 14% reporting that this was "strongly positive". In contrast, 24% of businesses reported that profits were negatively impacted with a further 38% saying the reduction was "strongly negative".

When asked about projected impact on profits over the next 12 months from March 2022 when compared to pre-pandemic trading, 19% of businesses are moderately positive and 5% responded that they "strongly positive" that profits are likely to be better than those before the pandemic. In contrast, 24% of businesses expect a moderately negative impact on profit compared to pre-pandemic levels, and a further 24% expect this impact to be strongly negative.

Over the next 12 months how do you think your business' profits will be compared to 'normal', pre-pandemic trading?	Royston responses no.	Royston responses %
Strongly positive	1	5%
Moderately positive	4	19%
About the same	1	5%
Moderately negative	5	24%
Strongly negative	5	24%
Unsure	5	24%



KPI 8: Town Centre User's Survey

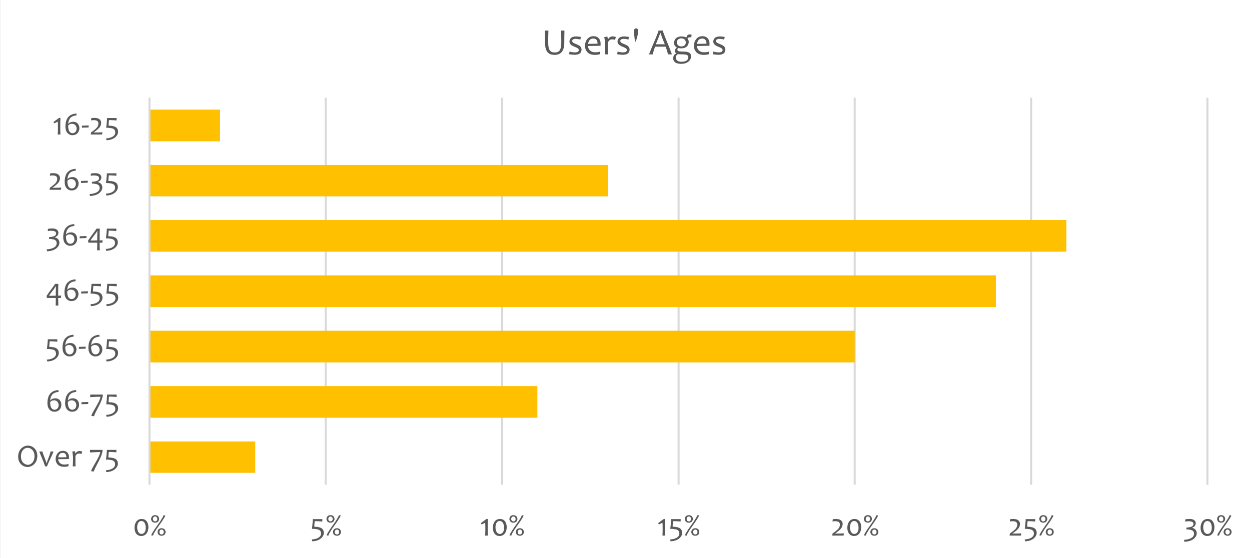
The aim of the town centre users' survey is to establish how a town is seen by those people who use it. It provides a wealth of data from a range of different types of local and visiting town centre users.

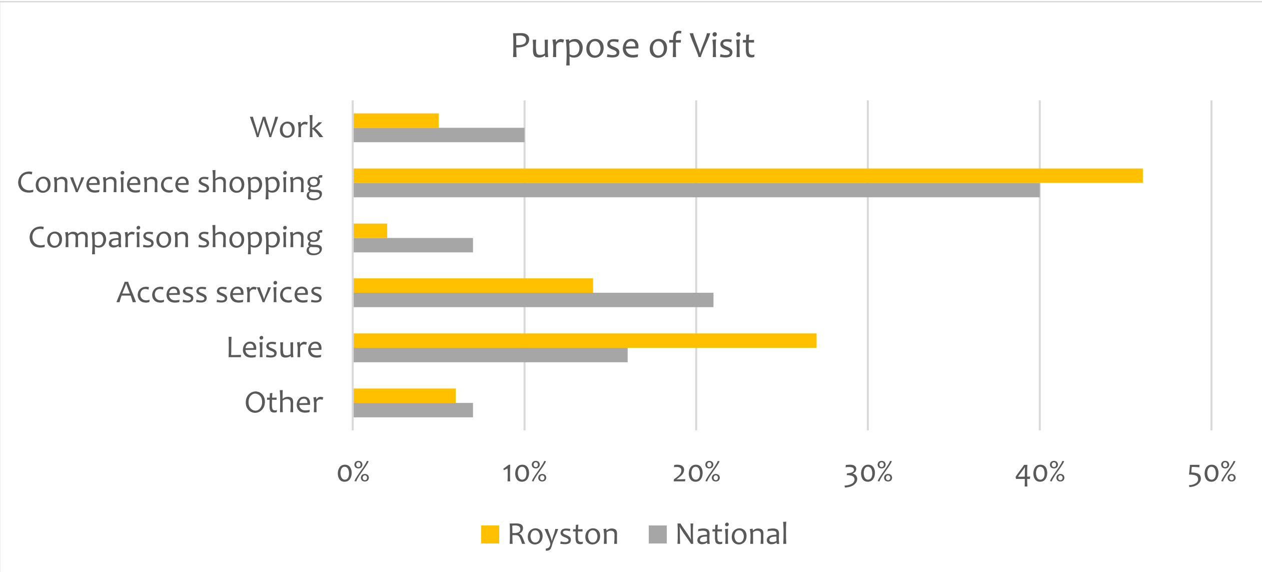
Characteristics of customers surveyed

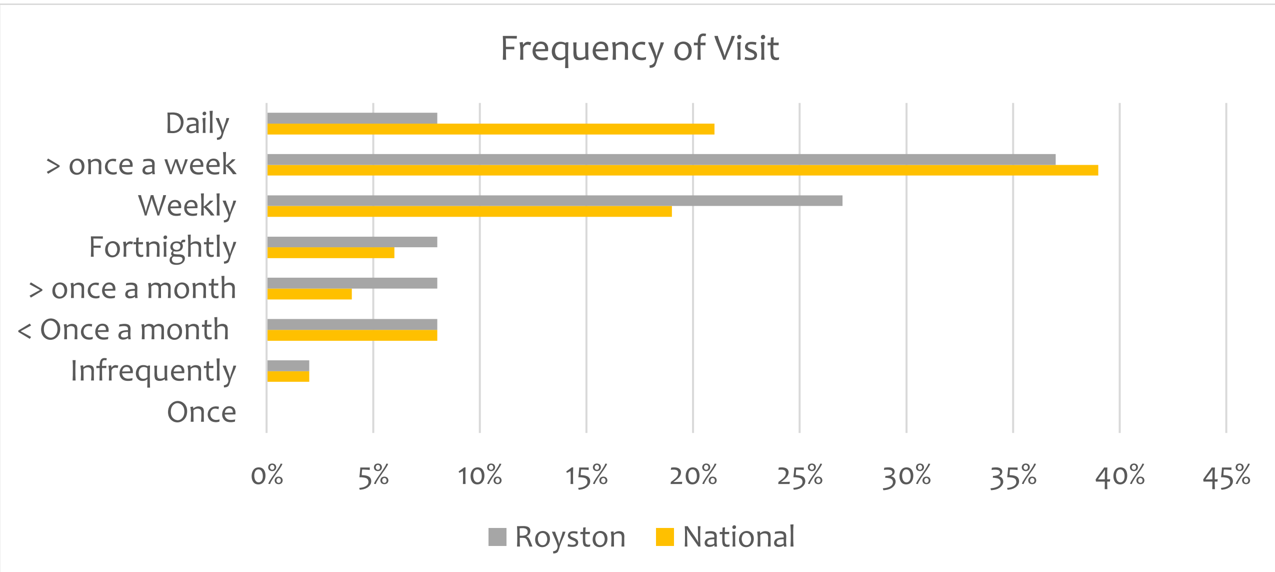
A sample of over 330 Royston town centre users were surveyed online through social media using the help of Royston Town Council.

Almost two-thirds of respondents were female, a comparable proportion compared to surveys conducted in towns nationally, in which two-thirds of respondents were female. There was healthy participation across age groups, with 36-45s providing the most responses (26%).

Customer background and nature of visit to town centre		**Royston (number)**	**Royston %**
Gender			
Male		110	33%
Female		212	64%
Other		1	<1%
Prefer not to say		7	2%
Age			
16-25		7	2%
26-35		44	13%
36-45		86	26%
46-55		78	24%
56-65		65	20%
66-75		37	11%
Over 75		11	3%
What is the main purpose of a typical visit to the town centre?	**National Small Towns %**	**Royston (number)**	**Royston %**
What is currently the main purpose of a typical visit to the town centre?			
Work	10%	17	5%
Convenience shopping	40%	152	46%
Comparison shopping	7%	8	2%
Access services	21%	46	14%
Leisure	16%	88	27%
Other	7%	21	6%


Users' Ages
16-25
26-35
36-45
46-55
56-65
66-75
Over 75
0%
5%
10%
15%
20%
25%
30%


Purpose of Visit
Work
Convenience shopping
Comparison shopping
Access services
Leisure
Other
0%
10%
20%
30%
40%
50%
Royston
National


Frequency of Visit
Daily
> once a week
Weekly
Fortnightly
> once a month
< Once a month
Infrequently
Once
0%
5%
10%
15%
20%
25%
30%
35%
40%
45%
Royston
National

Purpose of visit

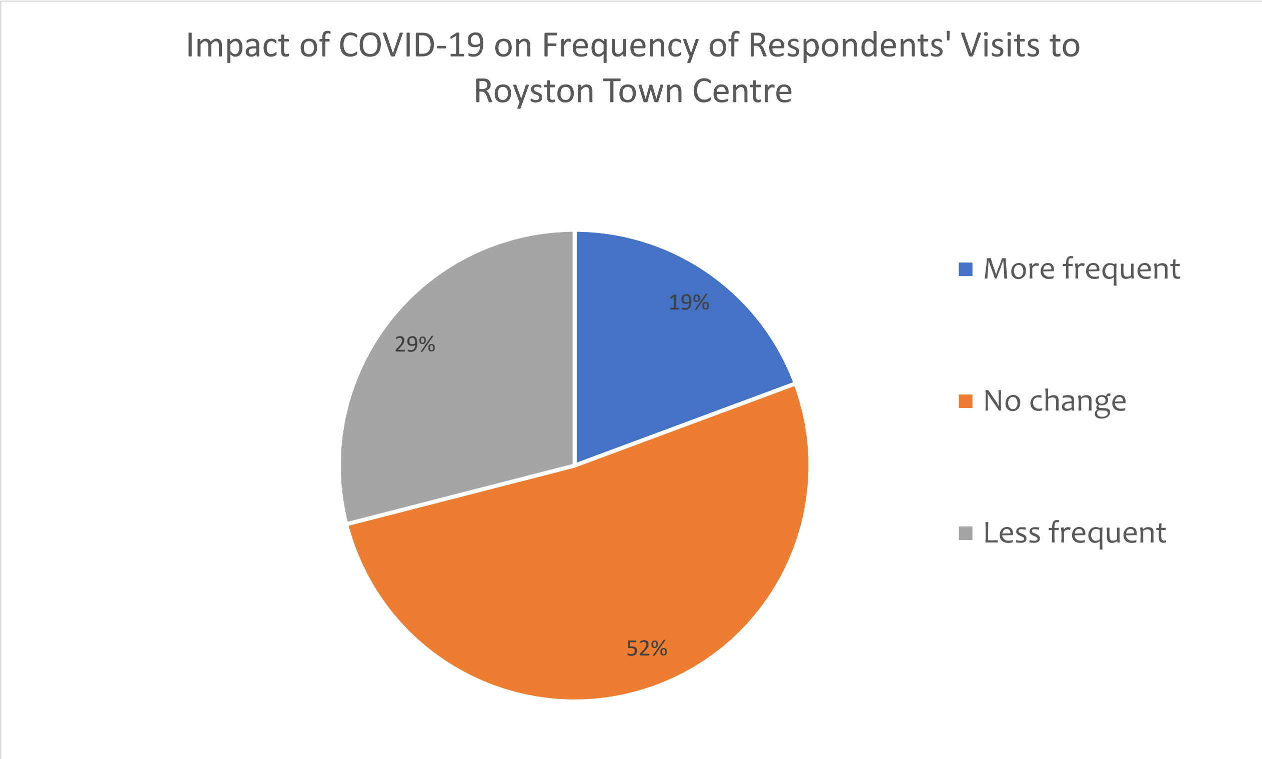
It is evident from the responses that most customers surveyed (46%) primarily visit Royston town centre for convenience shopping, such as groceries. This is followed by visits for leisure (27%), accessing services (14%), work (5%) and a small proportion for comparison shopping for fashion, gifts etc (2%).

A substantial majority of respondents (72%) are frequent visitors to the town centre, visiting more than once a week. Only 10% are infrequent users who visit Royston once a month or less. Over four-out-of-ten respondents are in and out of the town centre quickly during a typical visit with 42% spending less than an hour, while slightly more (46%) spend one to two hours. A further 9% dwell two to four hours, with 2% spending all day in town.

Frequency and duration of visits to town centre	National Small Towns 2022 %	Royston (number)	Royston %
How often do you currently visit Royston town centre? (Please choose one option only)			
Daily	21%	25	8%
More than once a week	39%	123	37%
Weekly	19%	91	27%
Fortnightly	6%	25	8%
More than once a month	4%	28	8%
Once a month or less	8%	26	8%
Infrequently	2%	14	2%
Only visited once	-	0	0%
How long do you currently stay during a visit to the town centre?			
<1 hour	44%	140	42%
1-2 hours	35%	153	46%
2-4 hours	13%	31	9%
4-6 hours	3%	0	0%
All day	5%	8	2%

An analysis of the 330 responses received from town centre users reveals that nearly a third (29%) of town centre users have reduced the frequency of their visits to Royston town centre due to the COVID-19 pandemic. Interestingly, 52% of users said that the pandemic has engendered no change in the frequency of their town centre visits, with 19% stating that their visits have become more frequent as a result of the pandemic.

How has the frequency of your visits to the town centre changed because of the COVID-19 pandemic?	Royston (number)	Royston %
More frequent	64	19%
No change	171	52%
Less frequent	96	29%



Customers' origins

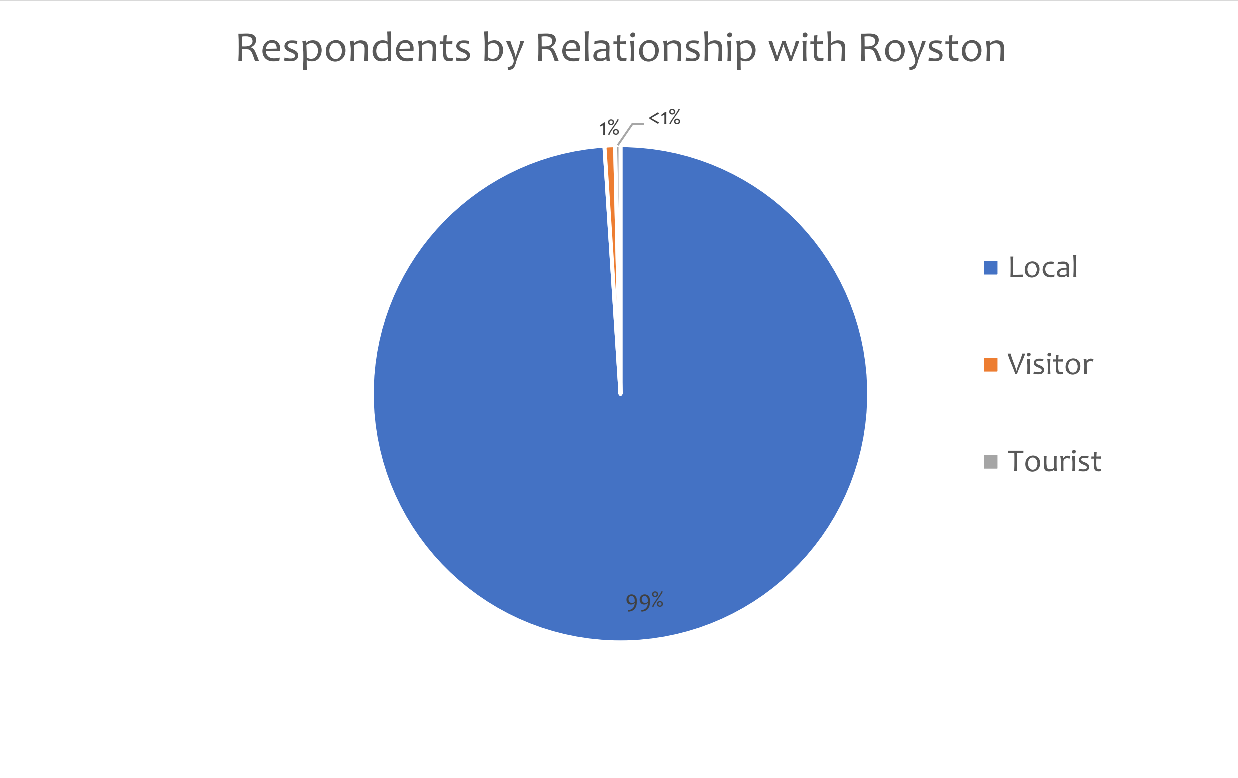
The customers' origin element of the town centre users' survey tracks the general area that town centre visitors originate from. The data can be used to target local marketing or promotional literature. It can also be used as evidence of the success of such campaigns by gauging the penetration into the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

	Royston (number)	Royston %
Locals	288	99%
Visitors	2	1%
Tourists	1	<1%

The figures for respondents' origins indicate that a large majority (88%) of town centre users live locally and that 11% visit from within a 30-minute drive of the town. The views expressed are therefore overwhelmingly those of local residents and visitors. This suggests that a balance must be struck between addressing local issues and improving the shopping, hospitality, and leisure offer of the town centre.

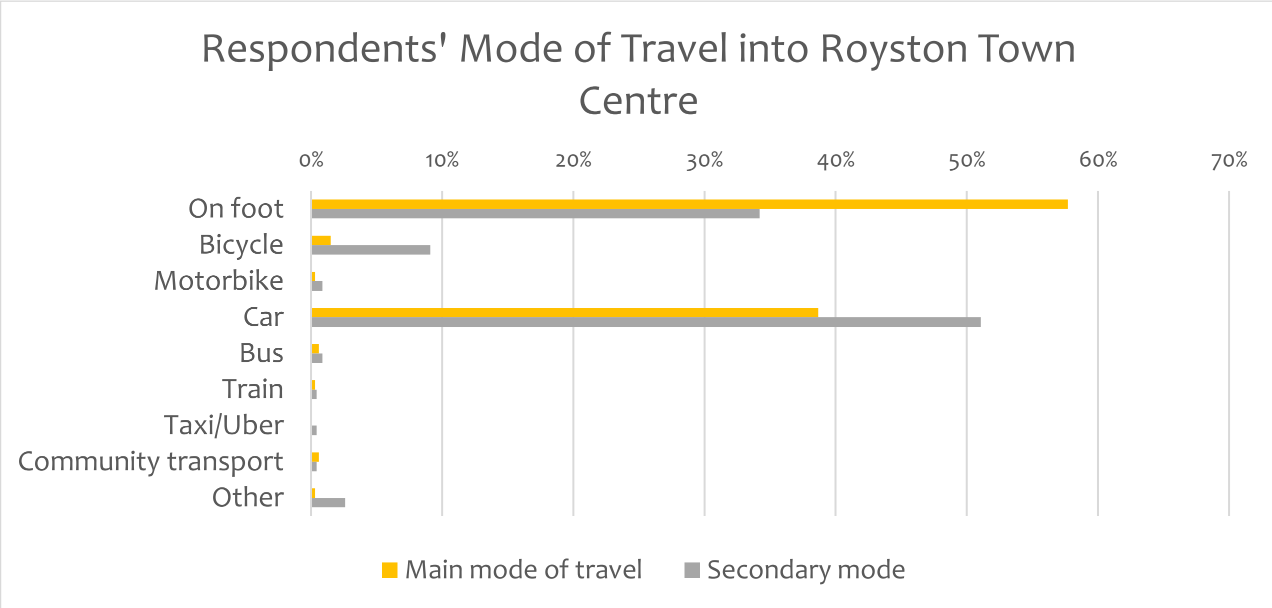


Travel to town

As part of the Royston 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 (56%) and car (41%) are the preferred primary methods of travel to town. Travelling to town by car (55%) and on foot (31%) are also the most popular secondary methods of travel into town, with no other mode gaining more than 5% of responses. This indicates that a substantial majority of town centre users are visiting either by foot or by car.

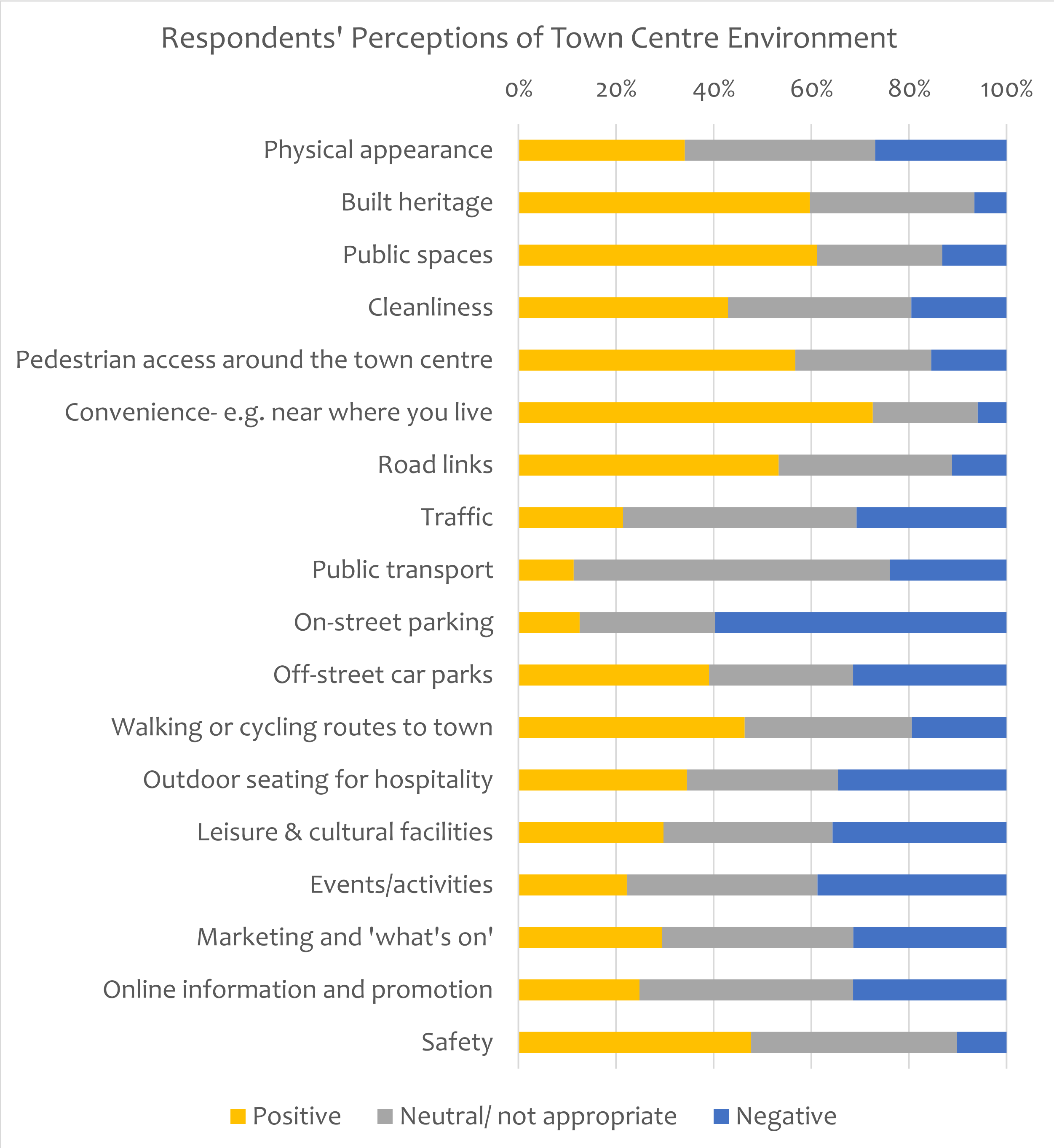
How do you currently travel into Royston town centre?	Primary (number)	Primary (%)	Secondary (number)	Secondary (%)
On foot	191	57.7%	79	34.2%
Bicycle	5	1.5%	21	9.1%
Motorbike	1	0.3%	2	0.9%
Car	128	38.7%	118	51.1%
Bus	2	0.6%	2	0.9%
Train	1	0.3%	1	0.4%
Taxi/Uber	0	0%	1	0.4%
Community transport	2	0.6%	1	0.4%
Other	1	0.3%	6	2.6%



Customers' perceptions of the town centre

Customers were asked to indicate their positive, neutral, or negative perceptions for a list of important town centre qualities.

Positive, neutral or negative aspects of the town centre environment	National Small Towns 2022 %			Royston %		
	Positive	Neutral	Negative	Positive	Neutral	Negative
Physical appearance	51%	15%	34%	34%	39%	27%
Built heritage	-	-	-	60%	34%	7%
Public spaces	-	-	-	61%	26%	13%
Cleanliness	57%	24%	19%	43%	38%	19%
Pedestrian access around the town centre	-	-	-	57%	28%	15%
Convenience	75%	19%	6%	73%	21%	6%
Road links	65%	16%	19%	53%	36%	11%
Traffic	40%	13%	47%	21%	48%	31%
Public transport	30%	38%	32%	11%	65%	24%
On-street parking	41%	16%	43%	13%	28%	60%
Off-street car parks				39%	29%	31%
Walking or cycling routes to town	71%	22%	7%	46%	34%	19%
Outdoor seating for hospitality	-	-	-	35%	31%	35%
Leisure & cultural facilities	22%	48%	30%	30%	35%	36%
Events/activities	30%	42%	28%	22%	39%	39%
Marketing and 'what's on'	-	-	-	29%	39%	32%
Online information and promotion	-	-	-	25%	44%	31%
Safety	50%	41%	9%	48%	42%	10%



Users were very positive about convenience (73%), public spaces (61%) and built heritage (60%). They were also positive about pedestrian access around the town centre (57%) and road links (53%). The majority of town centre users felt indifferent about public transport (65%).

In terms of negative aspects of Royston town centre's environment, on-street parking (60%) received the higher number of responses. To a much smaller proportion, customers were also negative about: events and activities (39%), leisure and cultural facilities (36%), outdoor seating for hospitality (35%), marketing and information about what's on (32%), online information and promotion (31%) and off-street parking (31%).

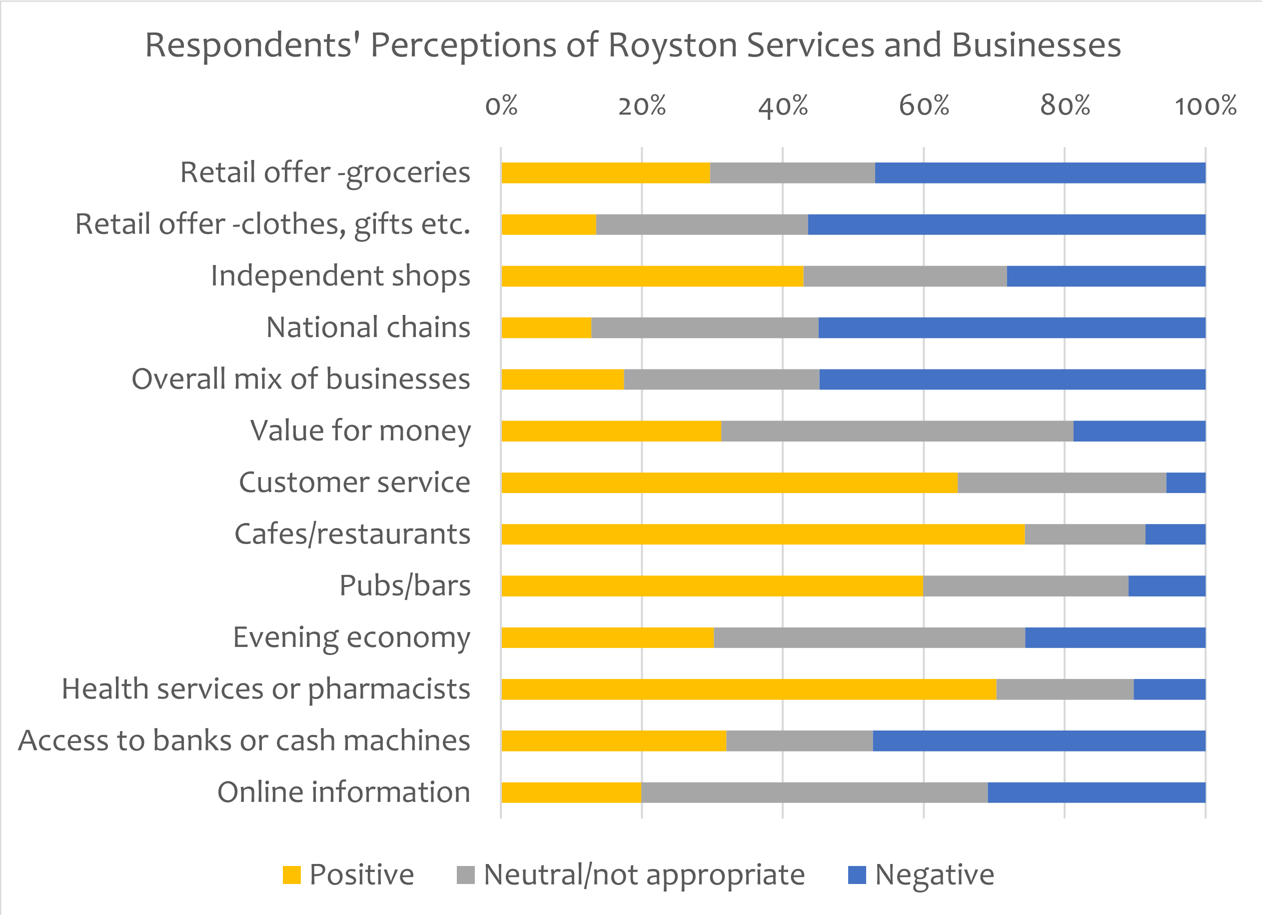
Subsequently, customers were asked to indicate the positives and negatives of the current provision of town centre services and businesses.

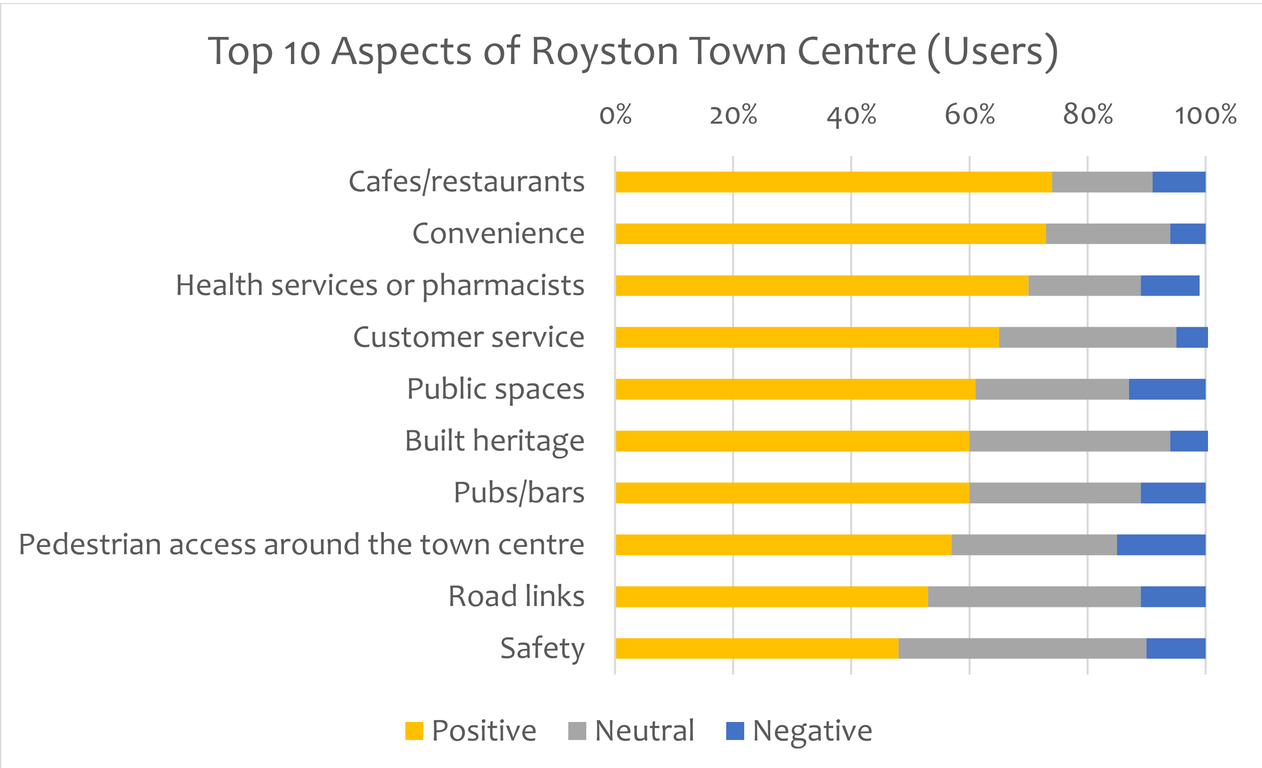
Customers are very positive about Royston's hospitality offer; rating cafes/restaurants (74%) and pubs/bars (60%) highly. Customers value the availability of health services and pharmacists (70%) in the town centre and the quality of services provided by businesses (65%).

Customers appeared to be neutral about value for money retail options, online information and evening economy.

In terms of negative perceptions of Royston town centre, concerns about the business mix are most prominent including the town centre's comparison retail offer (56%), the shortage of national chains (55%), the overall business mix (55%) and the convenience shopping offer (47%). The highest negative score was for the town centre's on-street parking provision (60%).

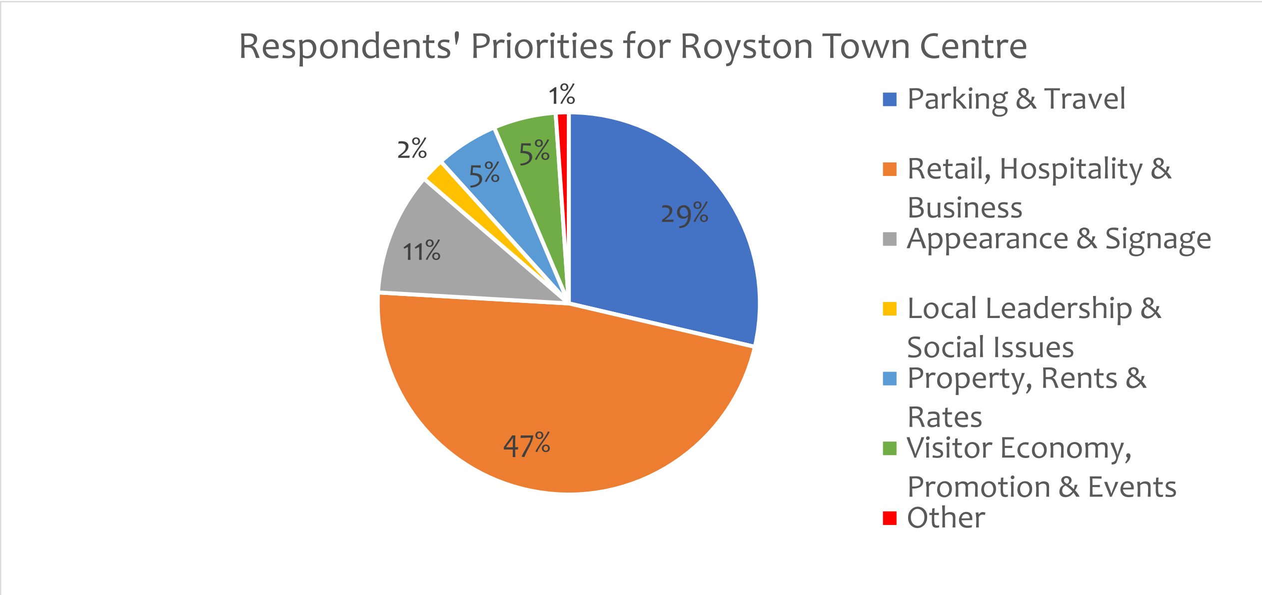
Positive, neutral or negative aspects of the town centre services and businesses	**National Small Towns 2022 %**			**Royston %**		
	Positive	**Neutral**	**Negative**	**Positive**	**Neutral**	**Negative**
Retail offer- groceries	63%	13%	24%	30%	23%	47%
Retail offer- clothes, gifts etc.	49%	14%	37%	14%	30%	56%
Independent shops	76%	10%	14%	43%	29%	28%
National chains	45%	22%	33%	13%	32%	55%
Overall mix of businesses	-	-	-	17%	28%	55%
Value for money	58%	21%	21%	31%	50%	19%
Customer service	53%	38%	9%	65%	30%	6%
Cafes/restaurants	57%	28%	15%	74%	17%	9%
Pubs/bars	40%	42%	18%	60%	29%	11%
Evening economy	-	-	-	30%	44%	26%
Health services or pharmacists	-	-	-	70%	19%	10%
Access to banks or cash machines	-	-	-	32%	21%	47%
Online information	-	-	-	20%	49%	31%

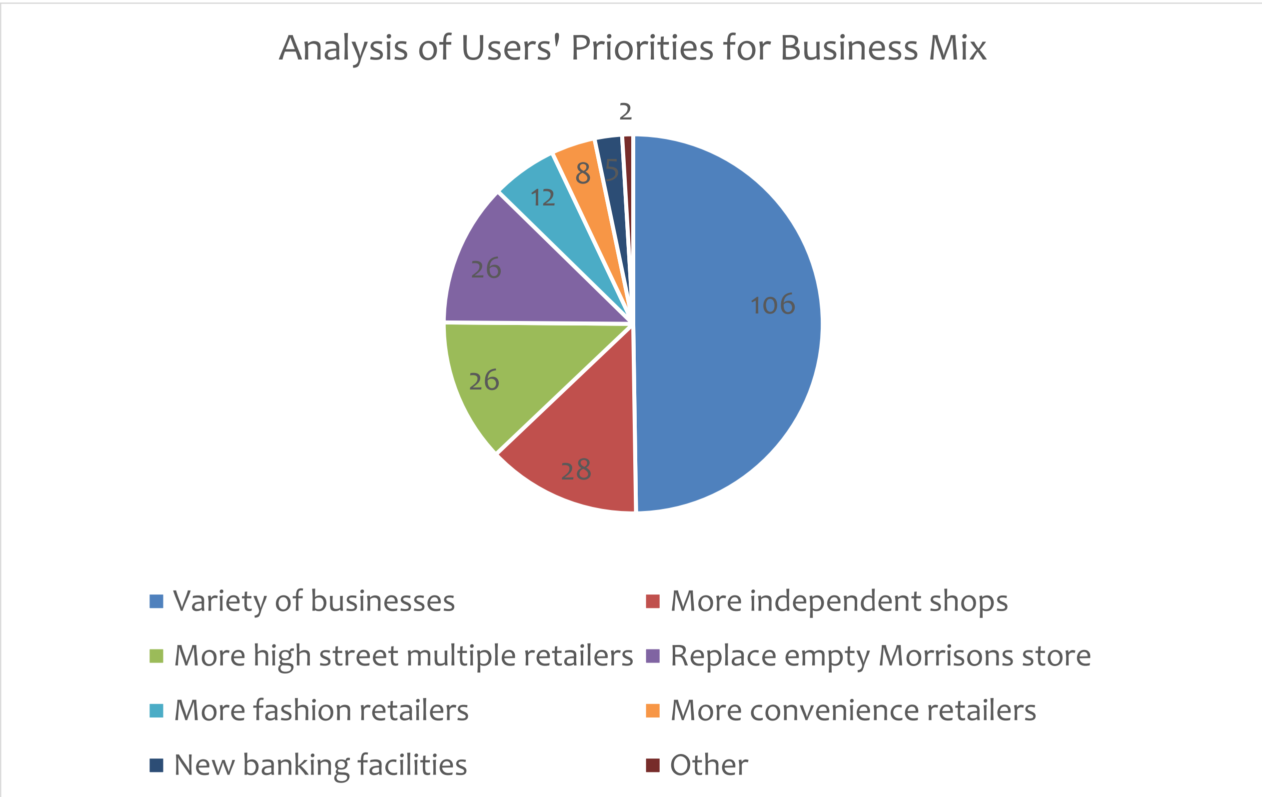

Respondents' Perceptions of Royston Services and Businesses
0%
20%
40%
60%
80%
100%
Retail offer -groceries
Retail offer -clothes, gifts etc.
Independent shops
National chains
Overall mix of businesses
Value for money
Customer service
Cafes/restaurants
Pubs/bars
Evening economy
Health services or pharmacists
Access to banks or cash machines
Online information
Positive
Neutral/not appropriate
Negative


Top 10 Aspects of Royston Town Centre (Users)
0%
20%
40%
60%
80%
100%
Cafes/restaurants
Convenience
Health services or pharmacists
Customer service
Public spaces
Built heritage
Pubs/bars
Pedestrian access around the town centre
Road links
Safety
Positive
Neutral
Negative

Customer priorities for improving the town centre

When Royston customers were asked what two things would improve the town centre, the dominant issue was a priority to improving its business mix (47%). Within this, concerns about the general variety of the retail mix (19%) were followed by calls for new independent retailers (5%), more High Street brand names (5%) and calls to replace the departed Morrisons store. These were followed by more modest calls to boost the number of fashion (2%) or grocery retailers. Aside from this there were specific calls to increase the variety of hospitality businesses (4%) and improve the market (2%).

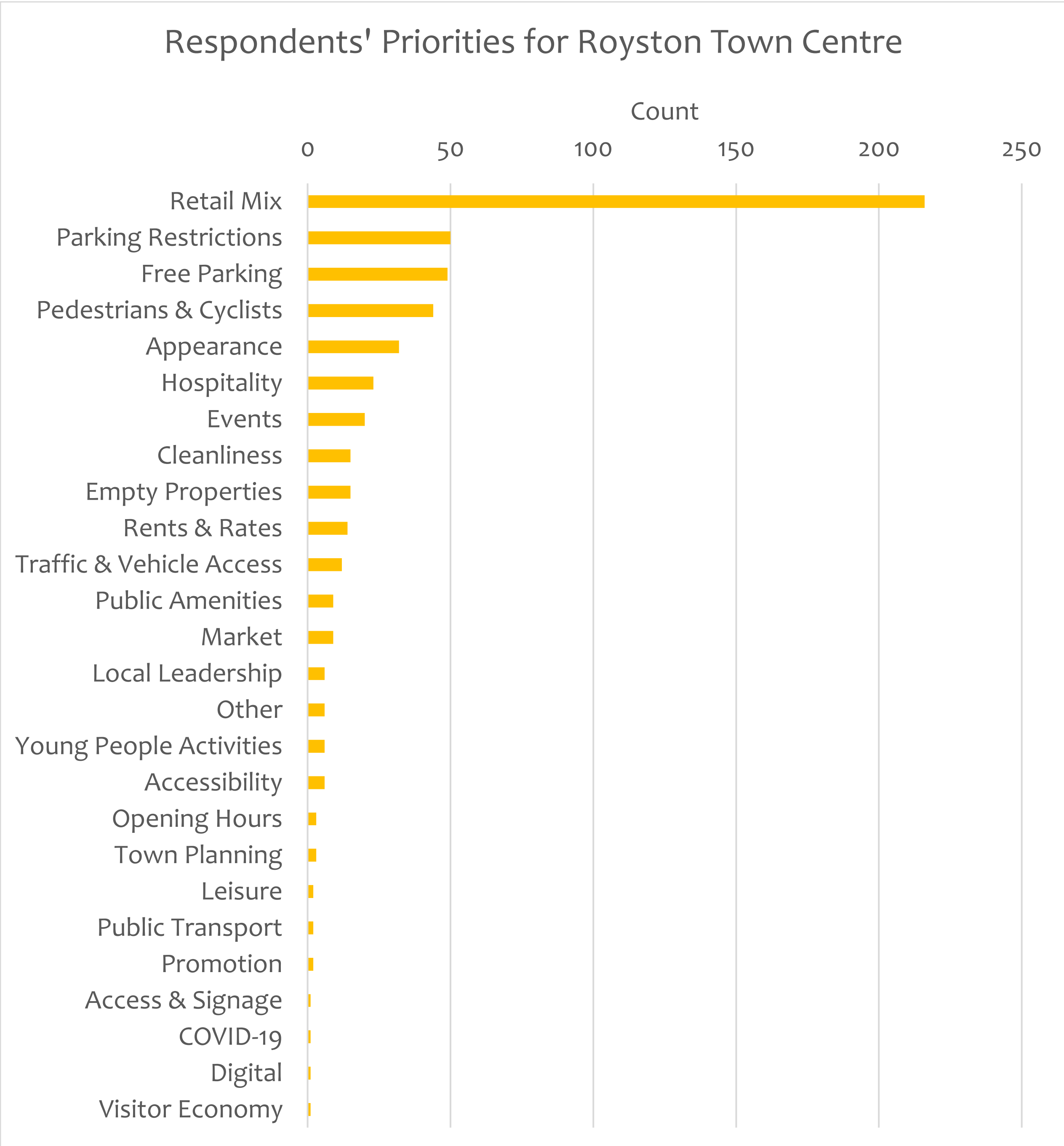




The second highest broad category of priorities related to parking and travel (20%), with traffic and vehicles access (9%), pedestrian and cyclists (5%), and parking issues (4%) most prominent within this.

The third most prominent theme covered appearance and amenity (12%) and included priorities expressed for improving public amenities (7%), appearance (4%) and cleanliness (2%) of Royston town centre.

Besides these broad categories, there were specific calls to boost the number of town centre events (4%), tackle vacant properties (3%) and make business rents and rates more affordable (3%).



Categories of Issue	Royston Responses (no.)	Royston Responses (%)
Parking & Travel	**157**	**29%**
Parking Restrictions	50	9%
Free Parking	49	9%
Pedestrians & Cyclists	44	8%
Traffic & Vehicle Access	12	2%
Public Transport	2	<1%
Retail, Hospitality & Business	**259**	**47%**
Retail Mix	216	39%
Hospitality	23	4%
Market	9	2%
Accessibility	6	1%
Opening Hours	3	1%
Leisure	2	<1%
Appearance & Signage	**57**	**10%**
Appearance	32	6%
Cleanliness	15	3%
Public Amenities	9	2%
Access & Signage	1	<1%
Local Leadership & Social Issues	**11**	**2%**
Local Leadership	6	1%
Town Planning	3	1%
Digital	1	<1%
COVID-19	1	<1%
Property, Rents & Rates	**29**	**5%**
Empty Properties	15	3%
Rents & Rates	14	3%
Visitor Economy, Promotion & Events	**29**	**5%**
Events	20	4%
Young People Activities	6	1%
Promotion	2	<1%
Visitor Economy	1	<1%
Other	**6**	**1%**

Below is a selection of responses for issues that received 10 or more comments from respondents. The figures in brackets are a reminder of the total number of comments received for each issue.

Retail, Hospitality & Business (259)

Retail Mix (216)

- More variety in shops
- Wider selection of shops
- More independent shops
- Encourage some chain stores into the centre
- Less cheap more upmarket shops
- Bring back Morrisons
- Replacement for Morrisons
- Supermarket chain store
- Organic fresh produce and refill shop
- More diverse shops, butchers, delicatessen, toy shop?
- More retail shops (not charity)
- Encourage a big business like Next, Primark a big clothing brand into the town
- More banking facilities
- Bring back NatWest presence in town centre for personal and business customers
- Another cashpoint

Hospitality (23)

- More bars and restaurants
- More eateries and bars and cafes
- More cafes, bars and restaurants especially for evening
- Greater choice of independent restaurants and bars
- Better choice of restaurants offering diverse food
- less coffee shops

Other (Market, Accessibility, Opening Hours & Leisure– 20)

- Encourage wider range of market stalls
- Expand the market
- Make shops accessible for disabled/pushchairs
- accessibility for disabled to shops
- Open late, not just for Christmas

- More leisure provision

Parking & Travel (157)

Parking Restrictions (50)

- Cheaper parking
- More short-term parking.
- Reinstate parking in the high street for short visits
- Reinstate parking spaces in High Street
- Immediately remove planters from High Street, quick parking spaces
- More/better motorcycle bays

Free Parking (49)

- Free parking
- More free parking
- Availability of free parking for short time (less than 20 minutes) would encourage more people to pop in and support the town centre
- More free parking especially for short-stays
- 1 hour free parking all day
- Remove car park charges in line with other towns in the area. Alternatively have an initial minimum 2 hour free parking

Pedestrians & Cyclists (44)

- Pedestrianised high street
- Fully pedestrianised
- Pedestrianise to create more of a cafe culture/social interaction/promenade
- Pedestrian section for dining
- Improve pavements and walkways
- Develop Angel Pavement

Other (Traffic and Vehicle Access & Public Transport– 14)

- Traffic free
- Reduce traffic
- Keep cars put of the High Street
- Less cars/ slow cars down on high street and upper king street
- Better transport
- Run 16 bus later to allow access to nighttime economy

Appearance & Signage (57)

Appearance (32)

- Remove the unsightly plant box eye sores
- The flower boxes are a little ugly
- Get rid of the ugly planters
- General appearance upgrade around town
- General face lift
- Building appearance

Cleanliness (15)

- Street cleaning
- Regular cleaning
- Cleanliness could improve
- Clean pavements, particularly where the pigeons mess
- Do something about the birds mess
- Clean up the disgraceful mess on the pavements

Other (Public Amenities & Access and Signage– 10)

- Better local amenities
- More public toilets
- Reinstate public toilet near High Street
- Free water fountain
- Reinstate benches so people can sit and perhaps be encouraged to stay longer in town and spend more
- Better signs

Property, Rents & Rates (29)

Empty Properties (15)

- Fill the empty shops
- Less empty shops
- letting the empty shops
- Make use of closed shop units for small businesses or pop-up shops/events
- offer empty stores to local businesses as pop up stores
- Put a theatre in the old Morrisons

Rents & Rates (14)

- Reduce rents to encourage new businesses

- Landlords reduce rent to stop pushing out businesses
- Reduce business rates
- Reduce the number of unused shops by forcing owners to offer them at a fair rate
- Reduce rates to attract more choice of retailers
- Lower shop rent to allow shops to thrive

Visitor Economy, Promotion & Events (29)

Events (20)

- More community activities and events
- More social stuff/ fetes/ fayres/
- More events, e.g. May Fayre, food stalls, music festival, medieval event, etc
- More things to do other than eat and drink
- Encourage evening events like Summer in the Square rather than stopping them
- Evening activities on high street

Local Leadership & Social Issues (11)

- Investment
- Financial incentives to attract more retailers
- Something to bring the Market Square and back streets into the mix
- Bring council/NHS services into town centre to encourage greater footfall.
- Remove COVID restrictions
- Wi-Fi

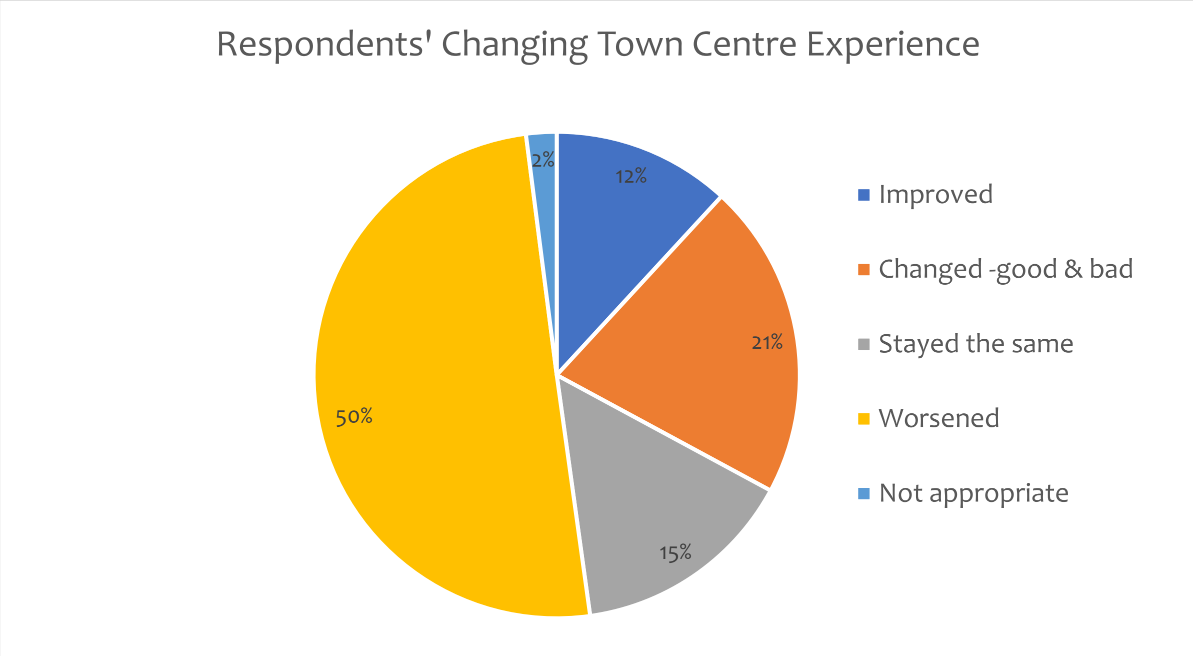
What one word would you use to sum-up the town centre?

The word cloud above represents the most popular words used by customers to sum up Royston town centre. The most prominent positive word used to describe Royston town centre is ‘friendly’, with some mention of ‘quaint’ and ‘pleasant’ too. Words like ‘tired’, ‘limited’, ‘empty’, ‘dull’ and ‘sad’ are among the most prominent negative sentiments expressed that need to be countered.

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

The most prominent positive word used to describe Royston town centre is ‘friendly’, with some mention oof ‘quaint’ and ‘pleasant’ too. Words like ‘tired’, ‘limited’, ‘empty’, ‘dull’ and ‘sad’ are among the most prominent negative sentiments expressed that need to be countered.

	National Small Towns 2022 %	Royston (number)	Royston %
How has your experience of the town centre changed in recent years?			
Improved	17%	35	12%
Changed- good & bad	23%	62	21%
Stayed the same	24%	44	15%
Worsened	29%	148	50%
Not appropriate	7%	6	2%
Would you recommend a visit to the town centre?			
Yes	69%	139	47%
No	31%	155	53%



How has your experience of the town centre changed?

When asked how their experience of Royston town centre had changed in recent years, half of respondents said that it had worsened (50%), while only 12% said it had improved and over a third (36%) said it had stayed the same or had a mix of good and bad changes.

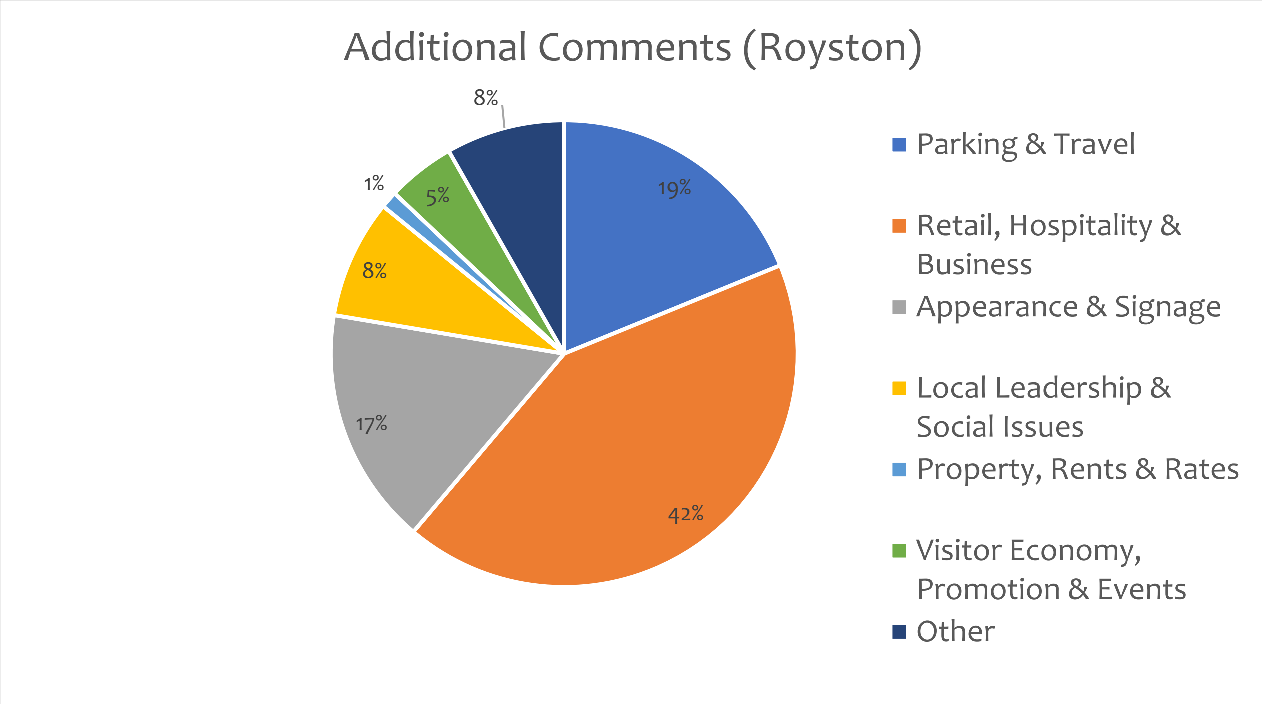
In similar fashion to the indication given by the word cloud, this question would give a good sense of continued progress to ensure users' perceptions are positive if, when posed again in one to two-years' time, a high percentage of respondents report that their experience of the centre had improved in recent years.

Recommending a town centre visit

Consistent with the balance of sentiments expressed in response to other questions, when customers were asked if they would recommend a visit to Royston town centre, just under half (47%) of respondents said 'yes'. This compares with sentiments expressed nationally, where typically 72% of users would recommend a visit to their local town centre.

Analysis of other comments

The volume of 'other comments' added by town centre users as part of the survey demonstrates the strength of local feeling about Ware town centre. As a result, extra analysis was undertaken to assess if there were any trends amongst the 243 comments received.



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 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 set of questions were 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

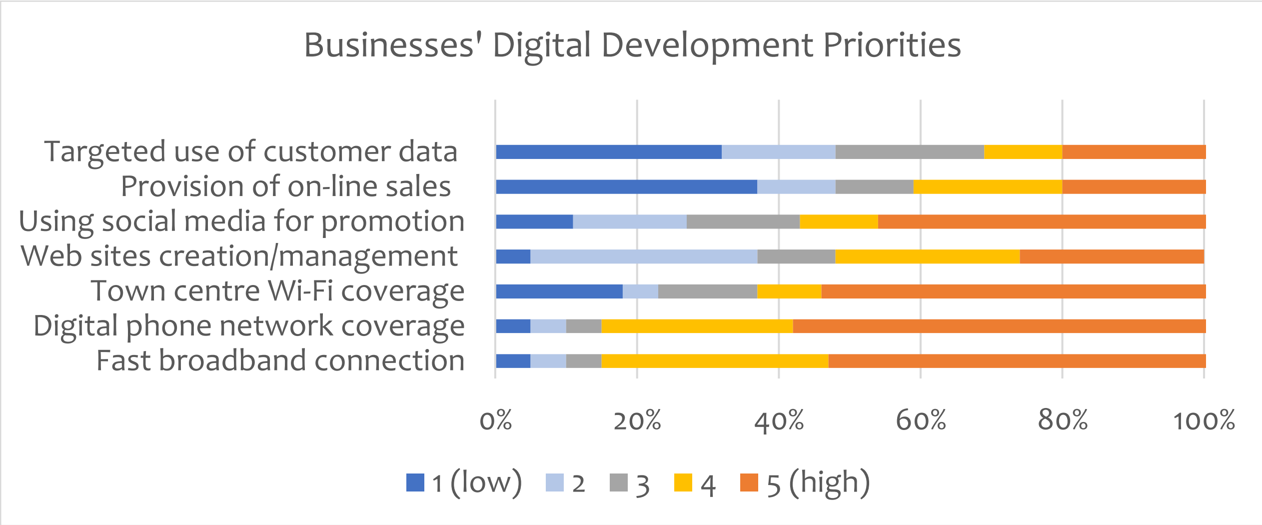
Analysis

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 percentage 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.

Across businesses, digital phone network coverage appeared to be the highest priority with 59% of users indicating it as a very high and 27% a high priority. This is shortly followed by fast broadband connection, with 55% of business users indicating it as a very high and 32% as a high priority. Use of social media (58% of total high and very high priority responses) and website management (52% in total), were the digital services given the most priority by businesses. Provision of online sales (and targeted use of customer data (32%) appeared to be of the lowest priority across businesses in Royston.

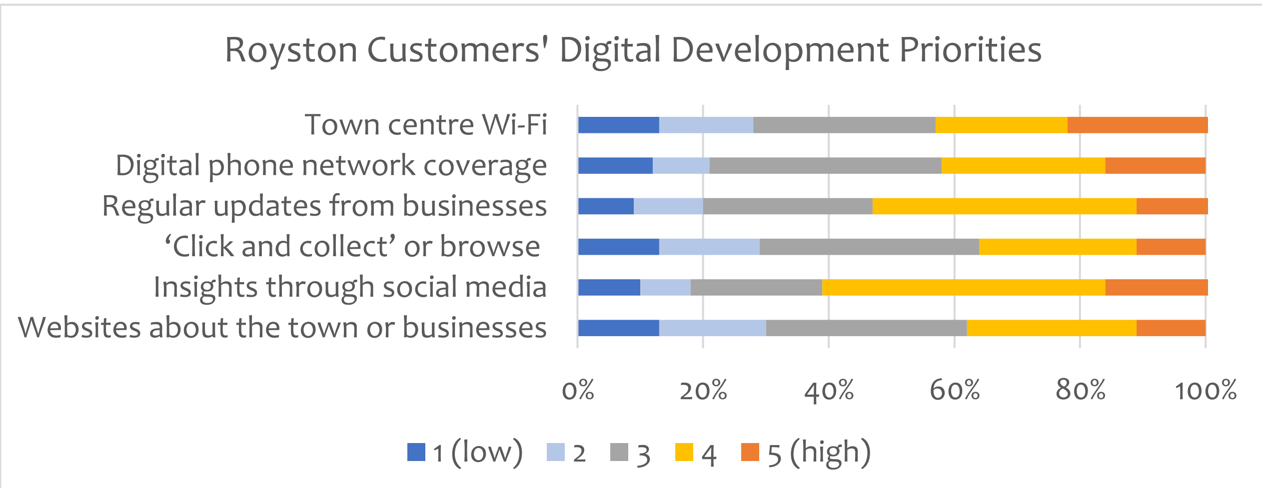
Businesses' digital priorities	No. of responses	1	2	3	4	5	Royston Average	National average
Fast broadband connection	22	5%	5%	5%	32%	55%	4.27	3.75
Digital phone network coverage	22	5%	5%	5%	27%	59%	4.32	3.89
Town centre Wi-Fi coverage	22	18%	5%	14%	9%	55%	3.77	3.09
Web sites creation/management	19	5%	32%	11%	26%	26%	3.37	2.98
Using social media for promotion	19	11%	16%	16%	11%	47%	3.68	3.59
Provision of on-line sales	19	37%	11%	11%	21%	21%	2.79	3.11
Targeted use of customer data	19	32%	16%	21%	11%	21%	2.74	3.75



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. A majority of respondents evaluate insights through social media re businesses, products, places to eat, things to do etc (17% very high priority and 45% high priority), regular updates from businesses re special offers, things to do etc (54% in total). and digital phone network coverage (50%) as high priority regarding future visits to the town. A plurality of respondents rate 'click and collect' or the ability to browse products as part of their visit as a moderate or low priority (36% in total) regarding future visits to the town.

Users' digital priorities	**No. of responses**	**1**	**2**	**3**	**4**	**5**	**Royston average**	**National average**
Websites about the town or businesses	304	13%	17%	32%	27%	11%	3.07	3.75
Insights through social media	303	10%	8%	21%	45%	17%	3.51	3.89
'Click and collect' or the ability to browse products	302	13%	16%	35%	25%	11%	3.05	3.09
Regular updates direct from businesses	303	9%	11%	27%	42%	12%	3.35	2.98
Digital phone network coverage	301	12%	9%	37%	26%	16%	3.25	3.59
Town centre Wi-Fi	301	13%	15%	29%	21%	23%	3.27	3.11



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, with experience showing 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.

Overleaf is a summary of the advantages and disadvantages of different approaches to partnership development. This has been taken from a case study of creating talented town teams prepared by the People & Places Partnership for the LGA.

Action planning: A Timetable for Change

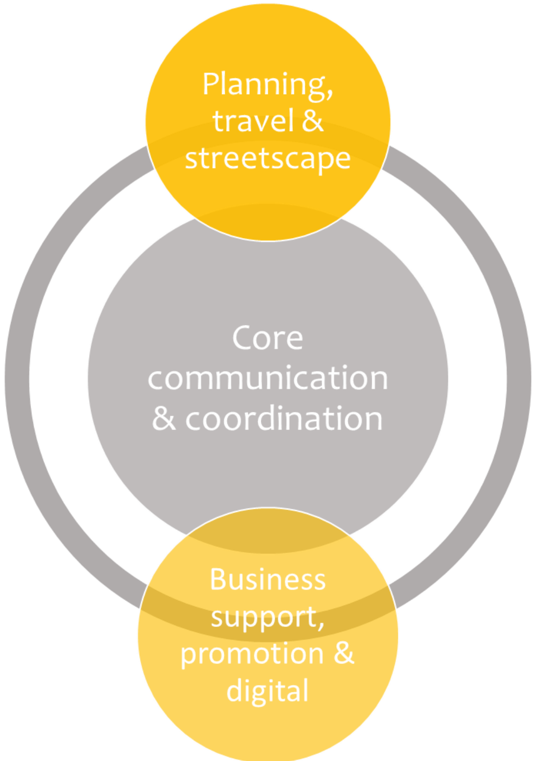
A town centre action plan is necessary to determine and define objectives, projects, responsibilities, budgets, timescales, outcomes and impact measures as the building blocks of the coordinated delivery of improvements on the ground. The annual review of such an action plan should begin and end with a review 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 council 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 links to Chamber of Trade, for example
Business-led town team	Business-like approach & understanding of economic issues 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	Combine 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

Getting organised: Local and district level governance

Royston's Recovery Themes

This review of existing strategy, town centre metrics and stakeholder perceptions, points to potential themes for the 'how' and the 'what' of revitalising Royston 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, travel and streetscape
This theme could reflect on planning for the greater recognition of the town centre, development of the attractive central core, improvements to the public realm and development of customer focused parking and active travel strategies. It can cover themes such as:

- Planning & property
- Parking, travel & access
- Streetscape & public realm

THEME 2: Business support, place promotion and digital development
A second potential theme for an integrated approach to town centre revitalisation in Royston could include support for collaboration between Royston BID and Town Council,
As well as continuous business engagement and support. It could also include marketing and promotion of Royston as a destination, drawing on its existing features:

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

THEME 3: Partnership development driven by effective communication and coordination
An overarching third theme focuses on how town centre recovery and revitalisation is delivered through partnership development between key stakeholders. This can cover:

- Communications & engagement
- Coordination & monitoring

Agreeing a Forward Framework

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

Issue & potential project/initiative	Outcome sought (years 2 & 5)	Responsibility & timetable
THEME 1: PLANNING, TRAVEL & STREETSCAPE		
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 Royston town centre will involve maintaining and improving the current business mix and planning for the town centre's potential redefinition. 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. The Local Plan acknowledges Royston as the third largest of the four towns in North Hertfordshire when measured by population. Located away from the Hitchin-Letchworth-Baldock group, it plays an important service role for many of the surrounding villages in both Hertfordshire and Cambridgeshire. The earlier Retail Strategy indicated that the estimated projected demand for additional Class A1 to A5 floorspace in Royston was 5,200 m^2 gross by 2026, increasing to 7,100 m^2 gross by 2031 of which 1,100 m^2gross could be met by the reoccupation of vacant floorspace. While there are no updated plans published, it is not apparent that this growth has been delivered on the allocated sites. The Royston Town Centre Strategy is a supplementary planning document adopted in 2008 that sets out the Councils' vision and aims for the town centre within the next 15 years. It sets out vision and key aims for the Royston town centre to be identified as a vibrant heart. Seven key opportunity sites were identified within the town centre to create enhanced public spaces, retail hubs and civic areas. The business data for Royston indicates that current retail focuses on the provision of comparison retail such as items for personal care, home and luxury. The proportion of convenience retail businesses is low (4%) and following the 2020 closure of Morrisons, only includes a Tesco Express store as the only town centre supermarket.		

<table>
<tr><td colspan="3">Survey results show that Royston town centre customers are expressing concerns about the business mix, including the town centre’s comparison retail offer (56%), the shortage of national chains (55%), the overall business mix (55%) and the convenience shopping offer (47%). Customers are, however, very positive about Royston’s hospitality offer: rating cafes/restaurants (74%) and pubs/bars (60%) highly. Customers value the availability of health services and pharmacists (70%) in the town centre and the customer service provided by businesses (65%).

Businesses appeared to be the most dissatisfied with Royston’s appeal when compared to out-of-town shopping (63%), its offer relative to nearby towns (47%) and the potential for tourist customers (42%).

When Royston customers were asked what two things would improve the town centre, the dominant priority was improving its business mix (47%). Within this, concerns about the general variety of the retail mix (19%) were followed by calls for new independent retailers (5%), more High Street brand names (5%) and calls to replace the departed Morrisons store. These were followed by more modest calls to boost the number of fashion (2%) or grocery retailers. Aside from this there were specific calls to increase the variety of hospitality businesses (4%) and improve the market (2%).

Royston has a relatively low town centre business vacancy rate of 5%, compared to 9% for similarly-sized towns nationally.</td></tr>
<tr><td>Town Centre Planning and Development Strategy incorporating use class review: Review existing Local Plan and Town Centre Strategy, including updating the priorities based on what’s been delivered and consider a focus that also covers themes such as business engagement and support; parking and travel; digital development and the partnership and governance structure necessary for delivery. The new strategy could also review policies for the retention of primary/secondary retail areas and change of use in the light of recent government guidance.</td><td rowspan="3">Refreshed vision and priorities leading to the investment and delivery of improvements to the physical distinctiveness, travel, access and animation 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.

Increased foot-flow across the town centre.</td><td>2023-24</td></tr>
<tr><td>Community Street Audits: Evaluate the quality of streets and spaces from the viewpoint of pedestrians, using Living Streets’ community street audits approach. A detailed report can be used to prioritise recommendations for short-term enhancements that can improve pride in place.</td><td>2023</td></tr>
<tr><td>Creating a ‘heart’ for the town centre: Plan and budget for a deliverable programme of public realm and streetscape enhancements and events aiming to create a stronger sense of an attractive core for the town centre and recognised activity hub. This is likely to be focused on Market Hill and incorporate the Market Place, Fish Hill, Angel Pavement and associated car parking.</td><td>2024-26</td></tr>
</table>

Parking, travel & access: Is an integrated and customer-focused parking, travel, and access strategy in place?

As proposed in the 2008 Town Centre Strategy, primary vehicular routes have been removed from the town centre's core, assigning central King and High streets as the one-way low traffic routes. While improving pedestrian route provision, such an arrangement impacts on accessibility to the town centre's shopping core by vehicles.

Transport strategy identifies Royston as a town affected by its location, with more than a half of commutes to destinations outside of the North Hertfordshire area. The roads within Royston are described as broadly within the capacity, with some delays within the town in the evening peak hours. There is no definite active travel strategy, however potential cycling routes were identified in the Town Centre Strategy. Some ideas on parking and traffic management are amongst the projects and actions proposed by the Royston First BID Business Plan. This has a particular focus on connecting the industrial estate with the town centre through active travel or shuttle bus routes, including proposals for dockless city bikes within the industrial estate. Royston has been selected as pilot as part of the Hertfordshire Sustainable Travel Towns programme, that promises an innovative approach to reshaping the local highway network and places, in-line with the Local Transport Plan. Sustainable Travel Towns (STTs) will benefit from a package of measures that will achieve a significant switch to walking, cycling and public transport. It will be important that there is close coordination between the development and delivery of the Royston STT and wider town centre revitalisation.

The responses on travel to town show that on foot (56%) and car (41%) are the preferred primary methods of travel to town by respondents. Travelling to town by car (55%) and on foot (31%) were also the most popular secondary methods of travel into town, with no other mode gaining more than 5% of responses. This indicates that a substantial proportion of town centre users alternate to visit either by foot or by car. A small though significant proportion of respondents (9%), cycle to town as their secondary choice. When asked about positive aspects of Royston town centre, customers were positive about pedestrian access around the town centre (57%) and road links (53%). Such data indicates that the infrastructure enables people to access the town by a combination of car and on-foot in a way that appears to be convenient and appealing to customers. It also highlights the opportunity to boost walking as part of active travel strategies.

The Initial data collected for 2 private car parks and 7 public car parks serving Royston town centre, shows that there are a total of 920 spaces. Most of the spaces are available on a long-stay basis (92%), of these 355 spaces are in public car parks and can be used for both short and long stay. In terms of negative aspects of Royston town centre's environment for local customers, on-street parking (60%) was identified as the most negative, with more moderate responses about off-street parking (31%). Similarly, businesses were moderately negative about the on-street parking (59%) and off-street car parks (41%).

When businesses in Royston were asked to propose two suggestions to improve the town centre, the top priority for businesses was parking and travel (47%), within this parking restrictions (22%) and free parking (19%) featured prominently. Similarly, parking appeared as the second highest broad category of priorities across Royston's customers (20%), with traffic and vehicles access (9%), pedestrian and cyclists (5%), and parking issues (4%) most prominent within this.

<table>
<tr><td>Sustainable Travel Towns: Pursue the development and delivery of Royston as a Sustainable Travel Town in a way that incorporates earlier proposals including the allocation of cycling routes throughout the town centre and work with Royston BID on implementation of rental bike facilities.</td><td>Increased use of active travel and public transport to access the town centre in line with Councils sustainability agenda.</td><td>2022-30</td></tr>
<tr><td>Parking provision & perceptions: Customer-focused parking review covering quality, quantity and cost of provision as part of wider town centre access using the People, Places & Parking process or a similar approach. This should include assessing options for Market Hill alongside possible public realm enhancement and active travel promotion.</td><td>Positive stakeholder perceptions shown by re-survey of impact of parking.</td><td>2022-23</td></tr>
<tr><td colspan="3">Streetscape & public realm: Has a funding strategy and ongoing, prioritised streetscape and public realm improvement plan been agreed with an understanding of ‘connected value’?</td></tr>
<tr><td colspan="3">While the stakeholder survey data broadly indicates good satisfaction with the town centre environment by existing users, there remains scope for well-targeted interventions to boost the appeal across various areas of the town centre. The existing Royston Town Centre Strategy allocated opportunity sites such as unattractive buildings and open spaces where redevelopment could improve the character of the town centre and presented a concept plan of what character could be applied to each of the areas. The High Street and King Street are allocated as a retail core that together with surrounding public space would have the potential to become a ‘heart’ of the town centre. Similar opportunities are held by the site surrounding Town Hall. In addition to that, Royston BID is proposing activities in relation to public realm with more immediate impacts such as installation of night illumination to animate historical building facades and other landmarks, seasonal decoration and improved cleanliness.

When business users were asked to rate Royston’s appeal, they appeared to be the most positive about the town’s markets (63%) and public spaces (63%). Customers were very positive about convenience (73%), public spaces (61%) and built heritage (60%). The priorities’ theme covering appearance and amenity (12%), of Royston town centre was the third most demanded improvement across both business and customers’ sentiments. This theme included priorities expressed for improving public amenities (7%), appearance (4%) and cleanliness (2%)</td></tr>
<tr><td>Public realm enhancement feasibility and planning: Review opportunities highlighted in the Town Centre Strategy and investigate feasibility of targeted public realm enhancements. Such enhancements will improve appeal and movement between different parts and character areas of the town centre.</td><td rowspan="2">Increased footfall and foot-flow across the town centre connecting all parts of it.

Improved customer perceptions and business performance in biennial resurvey.</td><td></td></tr>
<tr><td>Enhancing central public space: Work on strategies to enhance streetscape on Market Hill, potentially integrating it within newly created public realm in a strengthened ‘heart’ of the town centre and re-configured parking.</td><td></td></tr>
</table>

THEME 2: 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?
The economy of Royston is split between the town centre functions and the large employment area or industrial estate to the north of the town. Both are covered by the Business Improvement District (BID). The Local Plan vision for North Hertfordshire aims to build a robust and prosperous economy with a greater mix of skilled jobs, focused on locations that best support the District's growing population, with a particular emphasis on support for small local businesses. Royston BID puts particular focus on bringing together local town centre and industrial estate's businesses, proposing a skills exchange and product showcase across both locations. Customers' satisfaction with the business mix in Royston was negatively affected by the closure of Morrisons and the affect it has made on the provision of comparison retail within the town centre. When Royston customers were asked what two things would improve the town centre, the dominant issue was a priority to improving its business mix (47%). Within this, concerns about the general variety of the retail mix (19%) were followed by calls for new independent retailers (5%), more High Street brand names (5%) and calls to replace the departed Morrisons store. These were followed by more modest calls to boost the number of fashion (2%) or grocery retailers. Aside from this there were specific calls to increase the variety of hospitality businesses (4%) and improve the market (2%). Besides this broad category, there were specific calls to boost the number of town centre events (4%), tackle vacant properties (3%) and make business rents and rates more affordable (3%). Customers are very positive about Royston's hospitality offer; rating cafes/restaurants (74%) and pubs/bars (60%) highly. Customers value the availability of health services and pharmacists (70%) in the town centre and the quality of services provided by businesses (65%). In terms of negative perceptions of Royston town centre from customers, concerns about the business mix are most prominent, including the town centre's comparison retail offer (56%), the shortage of national chains (55%), the overall business mix (55%) and the convenience shopping offer (47%). The highest negative score was for the town centre's on-street parking provision (60%). Businesses surveyed are most negative about the town centre's appeal compared to out-of-town shopping (63%) and its on-street parking (59%). They are moderately negative about Royston's offer compared to nearby towns (47%), its potential for tourist customers (42%), off-street parking (41%) and rental values/rates (41%). Over 60% of businesses reported profits negatively impacted by the pandemic and nearly half expected profits to be negatively impacted over the next 12 months. Of the businesses that responded to the survey, 47% were shops or retail services of some kind, and 10% were hospitality businesses.

Business engagement and support: Working through Royston BID as a voice of local businesses, engage with, support them and respond to their needs. This will include establishing strong connections between the town centre and industrial estates economies.	Increased business membership and engagement. Increased digital activity and profile of businesses and town.	2022-25
Business diversification programme: This helps to understand businesses' needs across sectors, engage with and provide appropriate, long-term, tailored support for their development and engagement in ensuring the town is vibrant, promoted, safe and clean. Additionally, address the closure of Morrisons and attempt to attract various comparison retail businesses to meet the needs of the residents.	Improved customer perceptions and business performance in biennial resurvey.	2022-25

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

Promotion and marketing were addressed in the Royston Town Centre Strategy as a tool to strengthen the town centre's identity. The proposed promotional activity focused on Royston's historic, market town characteristics and enhancing this identity.

Targeted marketing and communication appear as one of Royston BID's objectives. The BID is approaching this through an events programme including food and drink festivals and the wider distribution of promotional information. A particular focus is put on communication projects, including targeted social media campaigns. Royston BID runs a website that offers attractions and destinations around and within the town centre such as Royston Cave or Royston Town trail promoting the town centre to visitors.

It is evident from the responses that most customers surveyed (46%) primarily visit Royston town centre for convenience shopping, such as groceries. This is followed by visits for leisure (27%), accessing services (14%), work (5%) and a small proportion for comparison shopping for fashion, gifts etc (2%). Nearly a third of customers said the frequency of their visits had reduced post-pandemic.

A substantial majority of respondents (72%) are frequent visitors to the town centre, visiting more than once a week. Only 10% are infrequent users who visit Royston once a month or less. Over four-out-of-ten respondents are in and out of the town centre quickly during a typical visit with 42% spending less than an hour, while slightly more (46%) spend one to two hours. A further 9% dwell up to two to four hours.

While the response on the town centre's appeal appeared to be moderately positive, when users were asked how their experience of Royston town centre had changed in recent years, half of respondents said it had worsened (50%), while only 12% said it had improved and over a third (36%) said it had stayed the same or had a mix of good and bad changes. A word cloud showing users' perceptions indicated similar mixture of options with the most prominent positive word used to describe Royston town centre is 'friendly', with some mention of 'quaint' and 'pleasant' too. Words like 'tired', 'limited', 'empty', 'dull' and 'sad' are among the most prominent negative sentiments expressed that need to be countered.

Businesses were moderately negative about Royston's offer compared to nearby towns (47%) and its potential for tourist customers (42%),

Support events programme: Establish partnership between Royston BID and Royston Town Council to continuously promote Royston as an attractive destination, including by establishing an annual events programme created by itself and its partners as a way of boosting pride in place and increasing visitor numbers.	Increased footfall, including evidence of new and return visitors for events. Improved customer perceptions and business performance in biennial resurvey.	2022-24
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?		
There is no comprehensive strategy for Royston's digital development, though it is a recognised objective of Royston BID's Priority Projects plan. This aims to improve the existing town-centre website and oversee targeted social media campaigns to promote aspects of the commercial scene to a local audience. General presence of Royston on social media is limited to the town website, although it presents a good set of information about the town and its businesses that suits both locals and visitors. A new, mobile phone-based, footfall monitoring system for Royston and neighbouring towns was recently adopted by North Herts Council. This system will potentially give very useful baseline data as well as routine updates to understand the changing use of the Royston town centre, including movement around town. When businesses were asked about digital priorities, phone network coverage appeared to be the highest priority with 59% of users indicating it as a very high and 27% a high priority. This is shortly followed by fast broadband connection with 55% of business users indicating it as a very high and 32% as a high priority. Use of social media (58% of total high and very high priority responses) and website management (52% in total) were the digital services given the most priority by Royston businesses. When asked about the priorities, the majority of businesses remained indifferent to the online identity of the town (47%). Amongst town centre customers, 62% of respondents evaluate insights through social media about businesses, products, places to eat, things to do etc as a priority; regular updates from businesses about special offers, things to do etc (54%) and digital phone network coverage (50%). A majority of customers were indifferent to online information and promotion (44%).		
Continuous delivery of digital promotion: Further engagement with businesses, community groups, Royston BID and Town Council to establish social media channels and deliver an enhanced social media profile for Royston, local businesses, and events.	Increased digital activity and profile of businesses and town. Improved foot-flow revealed in monitoring as	2022-23

Regular footfall monitoring and review: Adopt a template for quarterly footfall and foot-flow monitoring including assessment of impact of interventions with partner organisations.	well as customer perceptions and business performance in biennial resurvey. Improved evidence-based understanding of customer activity/profile and impact of interventions.	2022-24
THEME 3: 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 Royston 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. As the only town in North Hertfordshire with a Town Council and a BID, there is continued to establish strong local leadership guiding the town centre's growth. 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 storis and evolving town identity/brand		
Communications planning: Preparation and delivery of internal communications between partners and external engagement with wider stakeholders.	Positive community & business perceptions shown in re-survey	2022>

<table>
<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>including improved experience of town centre.

Tracking of positive social media activity.</td><td>2022></td></tr>
<tr><td colspan="3">COORDINATION & MONITORING</td></tr>
<tr><td colspan="3">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 and working to achieve increasing ambitions. Elements of this partnership working 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 two 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 Baldock's town centre. Realistically, this should be viewed as a 5-10 year project that will need extra resources including organisationally to coordinate delivery.

The key opportunities for Royston are to review past proposals and current issues to develop deliverable plans for the potential redevelopment of key town centre sites and the enhancement of public realm to create a stronger sense of an accessible and bustling town centre core.

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. *Initial business engagement*: The publication of the summary should be used to begin engagement with businesses through the BID to gauge their reactions to the findings and involve them in developing future proposals. People & Places can help assist in as extension of the current work.
4. *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.
5. *Partnership development and governance*: The existing stakeholders as well as businesses representatives need to determine the partnership development and governance arrangements for revitalising Royston'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.