Hitchin Town Centre On-street users survey results summary July 2018

Rationale:

New Horizon was commissioned by the Hitchin BID Company to undertake a statistically valid on-street users' survey in preparation for the creation of a new five-year business plan to serve the BID when it renews its mandate later this year. A generic survey form was suitably adapted to reflect the current customer base and the type of information required from them to help establish how the town's current offer must evolve to meet their future needs.

A member of the New Horizon field team interviewed 100 users of Hitchin town centre over two full days during late June using standard market-research sampling techniques. A further 50 visitors were interrogated by the in-house Ranger team over the next few days and the two sets of returns collated then analysed using our specially prepared survey spreadsheet. This is a brief synopsis of the principal findings to accompany the results pages from the electronic Excel summary. Numbers shown below in red are the results from the last, 2015, on-street survey, where the questions are more or less comparable.

Overview:

The following key points are apparent from the summary of the 24 questions that you may want to consider as the new Business Plan is prepared then tested:

1. By and large there is a consistency over the years in the mix of people visiting the town, where they come from and why they do so. There has been no perceptible increase in footfall from outwith the immediate catchment area (nor to be fair a decrease either), suggesting that more could be done to target the affluent villages immediately adjacent to Hitchin to generate the increase in numbers that will sustain and satisfy local businesses
2. There is a fairly substantial desire to shop elsewhere and yet it is hard to believe that the offer in Stevenage is hugely different and superior to that of Hitchin, it's just presented differently. Work should be done to prove that most things can be purchased locally and probably more conveniently and cheaper by residents
3. Uptake of information provided by the BID website is poor, with many interviewees ignorant of its existence. Usage of IT for social media purposes is high and growing, less than a third not indulging, so the disconnect between using IT but not taking in the information on the local town site must be addressed
4. Parking seems to be an issue on several fronts now, not just a figment of the business imagination (something we have suspected for a while now), probably because car usage has risen in the last three years. Car park pricing was actively raised by a fifth of the total sample, with underlying concerns about availability, ease of access, signage and security. This topic must become a key plank in the town's future strategy, possibly resolved by the BID taking over the operation of public car parking in its totality
5. Availability of toilets is crucial to our desire to see people staying in town longer to spend more money. A positive campaign to encourage customers to use private facilities should be instigated so that it becomes second nature for all users of the town centre, removing the inbuilt limit on duration of stay

6. Growth of online usage is now noticeable in the data, almost the elephant in the room in terms of developing competition. The message must be put across to all businesses that this where the greatest threat lies. Town centre access and usage has to be constantly encouraged otherwise even quality high streets like the one in Hitchin will wither and die. A 'use it or lose it' campaign is required and it too must be sustained
7. Several interviewees noted the influence of high rents and rates and how they negatively impact the business base. Engagement with landlords, their agents and management companies on this issue must be ongoing too, ideally generating a solution that is acceptable to all parties
8. The BID Management team can take some comfort from the knowledge that nothing startlingly new or different has emerged from questioning the Hitchin customer base. However many long-standing issues remain (Churchgate for instance) and it's about time they are addressed to lift the town so it can actively compete with the obvious attractions in the region like Cambridge and St.Albans

Results summary:

- **Gender split and age profile:**
  The ratio of women to men sampled was **39:61**, pretty close to the one-third, two-thirds bias this type of survey usually demonstrates. The ages were fairly well-spread across all decades with a plateau across the 40 – 60 decades although it was a smallish sample from the under 20s

- **Q1** **Home post code and employment:**
  - **54%** of the sample offered an immediately local SG postcode with another **20%** from slightly further afield. **15%** of the sample gave a postcode from some distance away, Luton, Milton Keynes, St. Albans, Bedford and Cambridge being good examples. 5 "tourist "type visitors came from Germany, Fleet, Fareham, Northampton and Peterborough. The occupations offered included students, the retired (26%), the unemployed, housewives, civil servants, local shop and office workers and representatives of the police service

- **Q2** **Main purpose of visit:**
  - **54%** of the sample were in the town centre to shop, including food shopping and the market. **36%** had arrived for a leisure visit while just **7%** wanted local professional services. **16%** work in Hitchin, up **+3%** on our last user survey in 2015. Multiple purposes were logged, leading to percentages greater than 100%

- **Q3** **Duration of stay:**
  - **60%** of the sample stated their visit to Hitchin would be complete in two hours or less. **19%** expected to be there all day. **21%** intended to stay for 2-4 hours to examine the depth and scale of the local offer, **-7%** compared with the 2015 data

- **Q4** **Frequency of visit:**
  - **23%** visit daily, contributing to the **81%** who make the trip into Hitchin at least once a week. Another **11%** make the journey once a month. Cumulatively they add up to a huge, loyal customer base of regular customers supporting local businesses

Q5/6 **Vibrancy of the town centre and the reasons behind it:**

- Q5&6 were requested by the BID Management team who couched them in their own terms. Unsurprisingly it elicited an 89% positive response, obviously leaving just 11% with a contrary or no opinion on the matter. The leading explanation for its continuing vibrancy is its friendly nature although a feeling of security ran 'friendly' a very close second

Q7 **Mode of transport:**

- **28%** **(34%)** of the sample walked or cycled into the town centre. 61% **(51%)** used their car or came by taxi. **11%** arrived via public transport, **-4%** down on the 2015 survey. Car usage is on the increase, hence the increased pressure on parking

Q8/9 **Parking and what influences the choice of where to park:**

- The majority of our motorists used public car parking (60%) with St. Mary's and the Lairage cited most often. Ease of finding a space was the principal motivator, followed by specific location with price now voiced by **20%** as a key influencer. This latter point has grown in importance over the years (**+2%** on 2015) and could soon be a key issue in the minds of the motorists as they decide whether to drive to the OOT facility in Biggleswade where parking is free or pay for 2-4 hours in Hitchin

Q10 **Aspects of the town centre:**

- Six key physical aspects of Hitchin town centre were reviewed in this comprehensive question. **94%** recorded the physical appearance of the town as excellent or acceptable. **96%** thought the place clean up by +8% on 2015) and **93%** rated the landscaping and green planting. **88%** were enthusiastic about the seating and street furniture and **91%** were favourably impressed too by the local information and signage. However, public toilets and baby change facilities again fared unfavourably with almost half (**46%)** finding them unsatisfactory or poor

Q11 **The state of the commercial offer in Hitchin:**

- **93%** rated the overall appearance of local businesses excellent or acceptable. **74%** were impressed when range and variety was considered (**-6%** cf 2015). Ease of access was viewed positively by **87%**. Hours of trading were deemed to be satisfactory or better by **90%**. Over half the sample felt that the market offer was excellent or acceptable (**59%**). **84%** acknowledged the level of financial service provision. Restaurant and café facilities were highly rated too, by a colossal **98%** of the sample

Q12/13 **Purpose of evening visits to the town and how they might be improved:**

- A quarter of the sample DID NOT visit during the evenings. The prime reason for visiting Hitchin in the evening was to have a meal out (**66%**). Visiting a pub or club was next at **31%**, followed by the theatre (**10%**) or concerts (**10%**). Again multiple responses were recorded The suggestions have all been summarised in a separate tab on the accompanying results spreadsheet

Q14/15: **Stores visited and additions requested:**

- Key shopping destinations included the food supermarkets, clothing shops, the Post Office, cafés then Boots, Wilkinsons and Waterstones. More clothing and accessory shops topped the list of additional businesses requested with an enlarged and more comprehensive M&S the principal nomination. As always, a department store of some sort featured but other requests included a cinema and BMX/skating shops

Q16/17: **Other locations visited to shop and why:**

- Of those who reported visiting other places to shop (**90%**), Stevenage topped the poll followed by Welwyn Garden City, Online, Letchworth then London. The diversity of the offer, specific shops and convenience were the most proffered reasons for visiting other centres although a number of people went elsewhere purely 'for a change'

Q18/19: **Use of the Hitchin website and other social media platforms:**

- **71%** had never looked at the Hitch bespoke website (**14%** occasionally and **1%** often). The preferred social media vehicle is still Facebook (favoured by **51%)** followed by Instagram then Snapchat**. 31%** do not engage with social networks in any way

Q20/21/22: **Attendance at events and other ideas for attractions:**

- **70%** stated that they visited Hitchin for the events on offer, the Food & Drink Festival being the most popular attraction (**53%**). The Hitchin Festival was mentioned by **36%** with Christmas and Craft/ Farmers' markets popular. Rhythms of the World was again brought up by a number of interviewees despite it not featuring in the town for several years now. Other ideas are shared on a separate tab of the associated spreadsheet

Q23: **Spend per visit:**

- **41%** planned to spend between £10 and £20 with **36%** expecting to part with £20 to £50. **14%** would spend under £10. 5 people only out of 150 thought a bill of over £100 was possible

Q24: **Changes to improve frequency/ duration of visits:**

- Many respondents offered a thought or two for this final question. To allow the variety to be fully understood and the frequency with which some ideas occurred, I have duplicated all the replies, in their totality with duplications repeated:

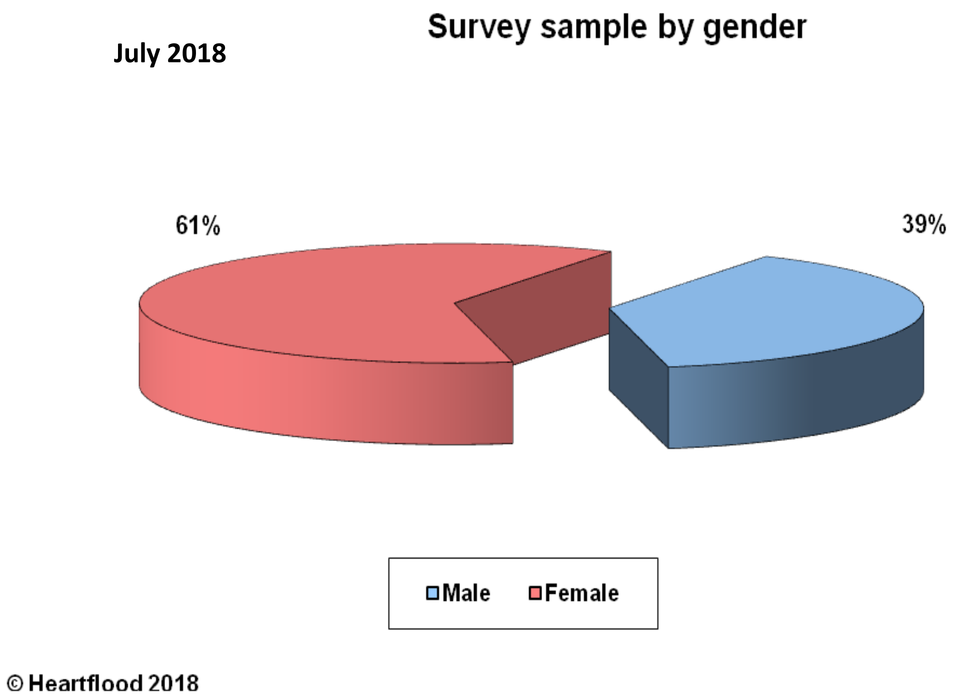
Improve the offer & appearance of the market
Churchgate refurb
Wheelchair access to all shops. Ramps etc
What's happening with the museum? More wasted money!
Better choice of gluten-free food available
Cheaper parking

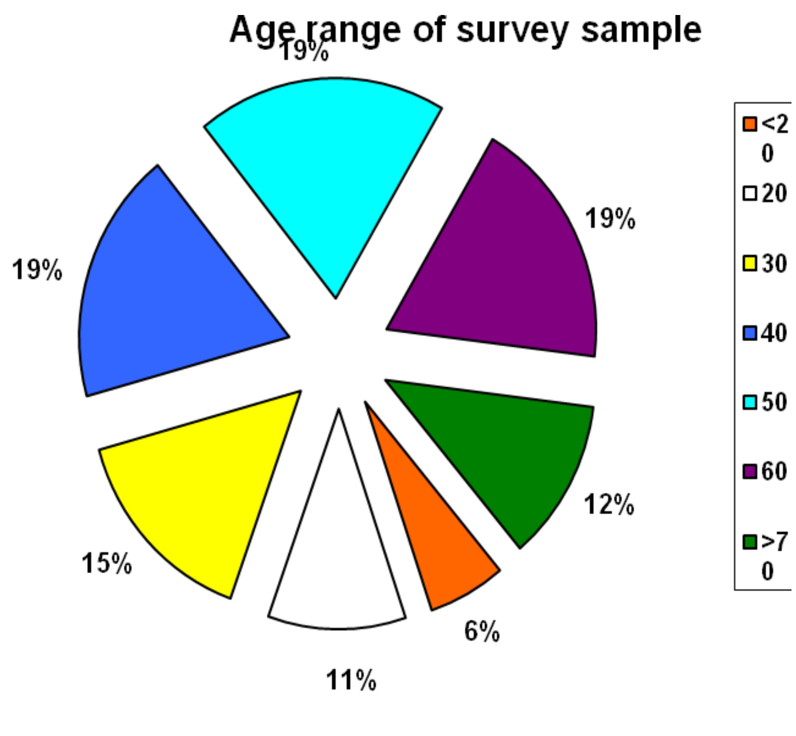
Better and more parking
Outside, staged productions
A department store where Churchgate is
Cheaper parking
Cheaper parking
Shops need to open when I want them not when it suits them!
Reduce car parking charges
Cheaper parking
A visitor to the town and I like it!
Cheaper parking
Free parking
Fill empty shops
A better variety of shops
More focus on local arts and talent
Less traffic in and around the Square
Play park for young kids
Parking is a real issue at busier times
Department store
More made of the river
I like it as it is!
Struggled to park but out of town is free
Parking is horrendous on Fridays and Sat mornings
More spaces to accommodate families in cafes
Cinema
No traffic in the middle
Sympathetic redevelopment of Churchgate
I like it as it is...
Improve the market
more independent, quality shops
I'll use the website now I know about it!
More parking
Bring more nature into town
Splash park/ water play near river
A department store where Churchgate is
Better parking arrangements
Demolish Churchgate and improve the facade
Work to link daytime shop hours and the evening time

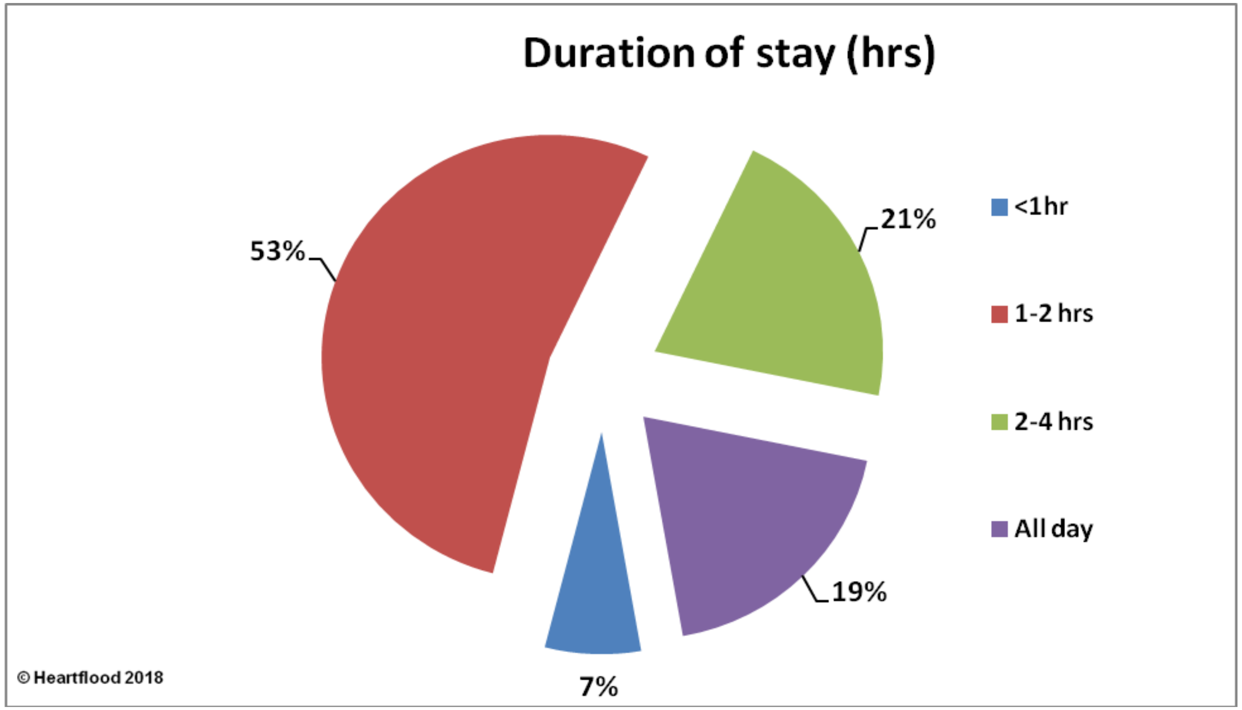
Better parking
pedestrianisation of High Street
More parking but where?
Churchgate is an eyesore
Nice place, I'll come back
Shops open longer
More variety of shops
Cheaper housing
Shops that are closed reopening - a little worried about shops closing and not being used -Hawkins, Kenmore etc
Primark on the corner opposite Wilkos
Better high street shops like Zara, H&M
John Ray being less greedy so that shops can stay open making less empty units
Wagamamas
Easier, cheaper parking   Cost of a stall in the market is excessive!
Fewer charity shops, market improved/more events in Market Square
Easier to find parking
Cheaper parking charges
Free parking
More open spaced used imaginatively
My mother is disabled, pavements, cobbles cause problems with her wheelchair. Some shops are not disabled friendly due to space and unable to make changes if it's a listed building
a John Lewis store
A department store
More shops that are not a) coffee b) food c) women's clothes
an Apple shop
wider variety of shops
More shops for younger people
Fill empty shops, fewer charity and coffee shops
Satisfied
Out of town parking, more pedestrianised centre
Too many cafes, hairdressers, would like to see market improved
Better/more parking, cleaner, more buggy friendly shops
More shops
Free parking
Make the town centre (Market Square) totally traffic free
Pedestrian only in town centre

Cheap or free parking for short stay eg picking things up
If I'm driving it is very difficult to find a space to park for the day and it's expensive. More parking needed.
More things open past 6pm
Cheaper parking
Parking easier and free
A quaint old market town
Parking can be difficult when not at work
Rents too high to support small businesses
Cinema
Package holiday deals for people to come and stay longer
Better, wider promotion of what's on....consistently
Don't change anything, its fine as it is!
More seats
Fill empty units
Cheaper parking
More dog-friendly pubs, dogs inside!
A big skate park or somewhere for kids to play
Better public transport, especially on Sundays
Problems walking on cobblestones
Department store....in Churchgate?
Cheaper shops
It’s a very interesting place particularly the old buildings
Working fountains, more seats near the river
More places to sit out and eat/ drink on fine days

Sample charts from the results spreadsheet:






Duration of stay (hrs)
53%
21%
19%
7%
<1hr
1-2 hrs
2-4 hrs
All day
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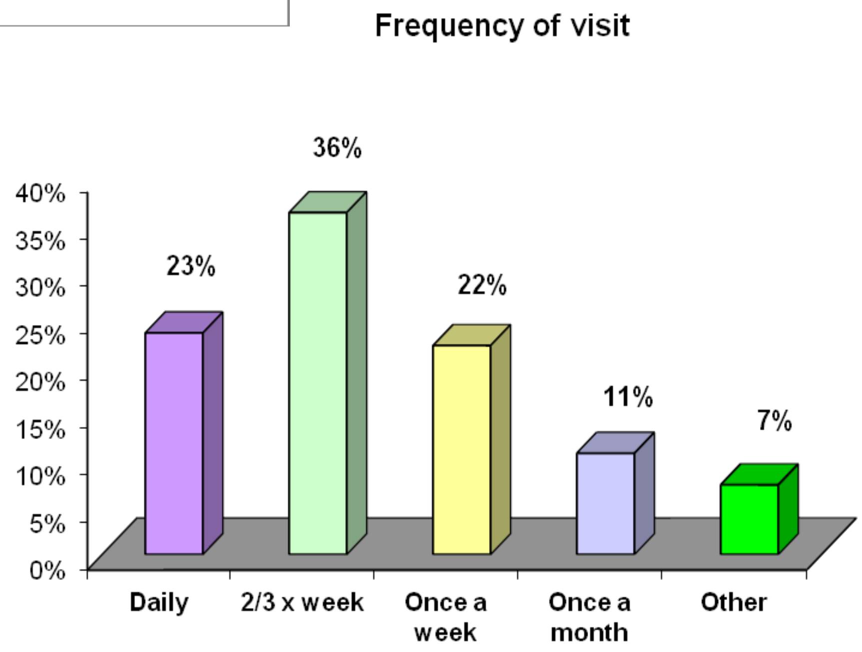
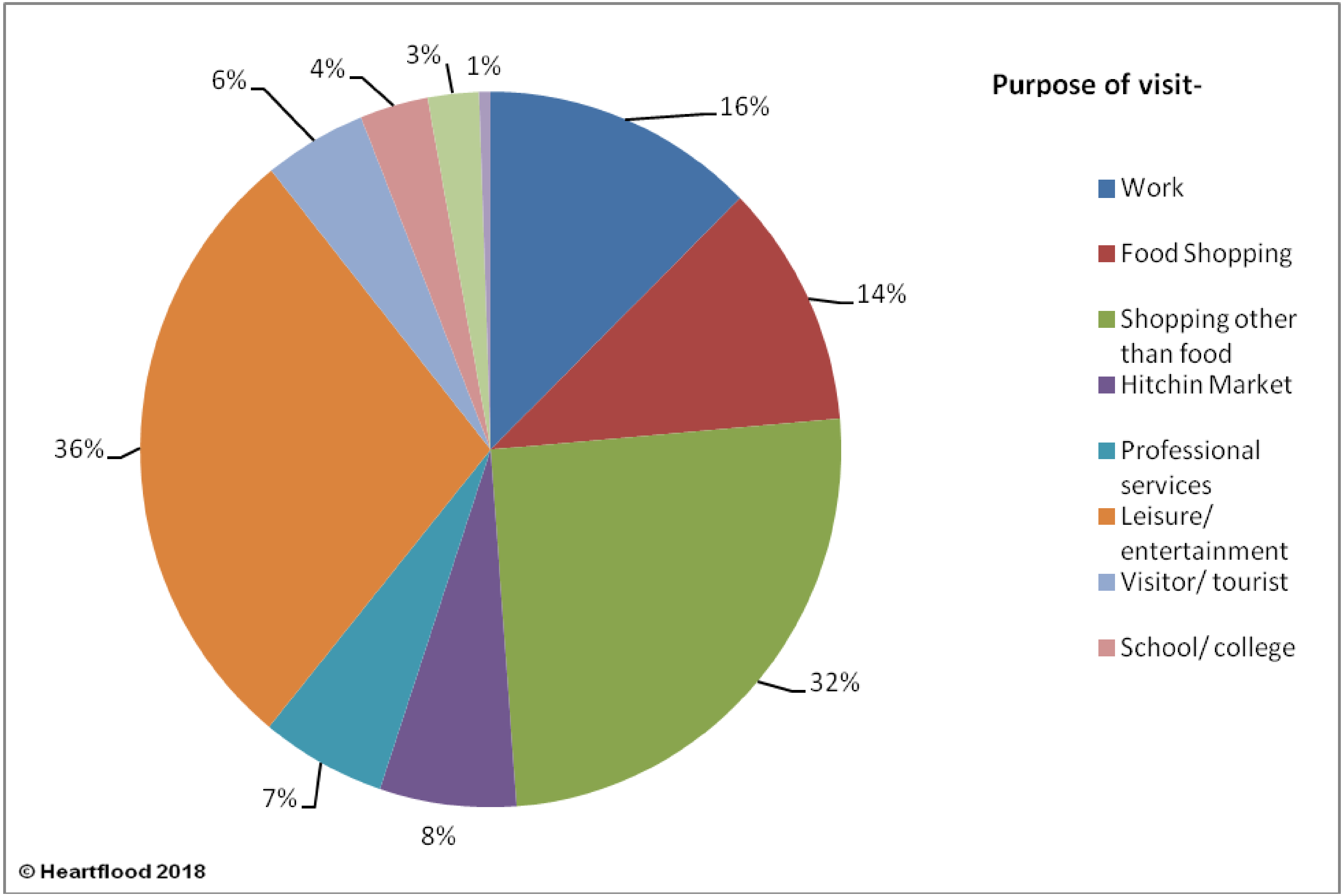

Frequency of visit
36%
23%
22%
11%
7%
40%
35%
30%
25%
20%
15%
10%
5%
0%
Daily
2/3 x week
Once a week
Once a month
Other


Purpose of visit-
Work
Food Shopping
Shopping other than food
Hitchin Market
Professional services
Leisure/ entertainment
Visitor/ tourist
School/ college
16%
14%
32%
8%
7%
36%
6%
4%
3%
1%
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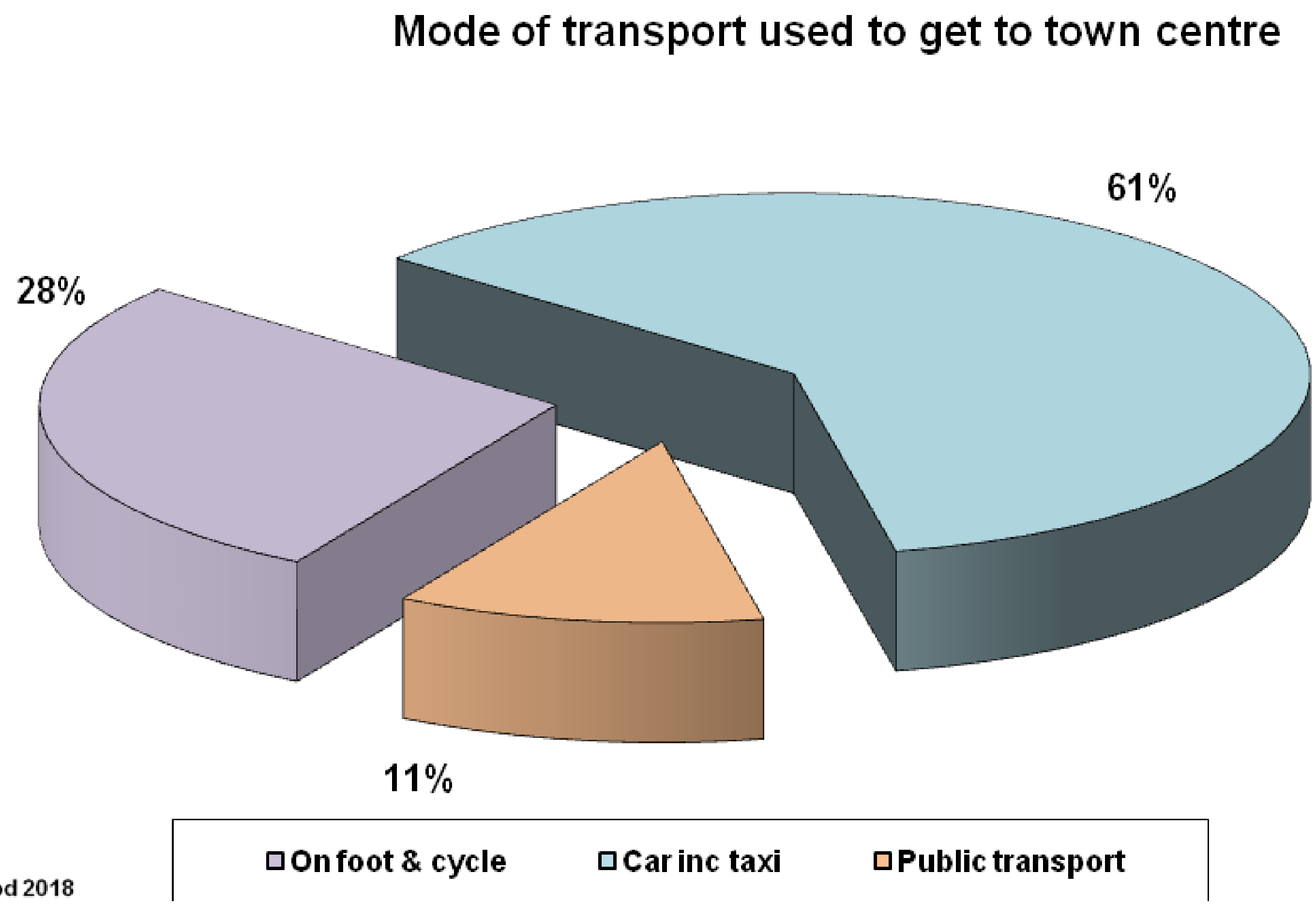
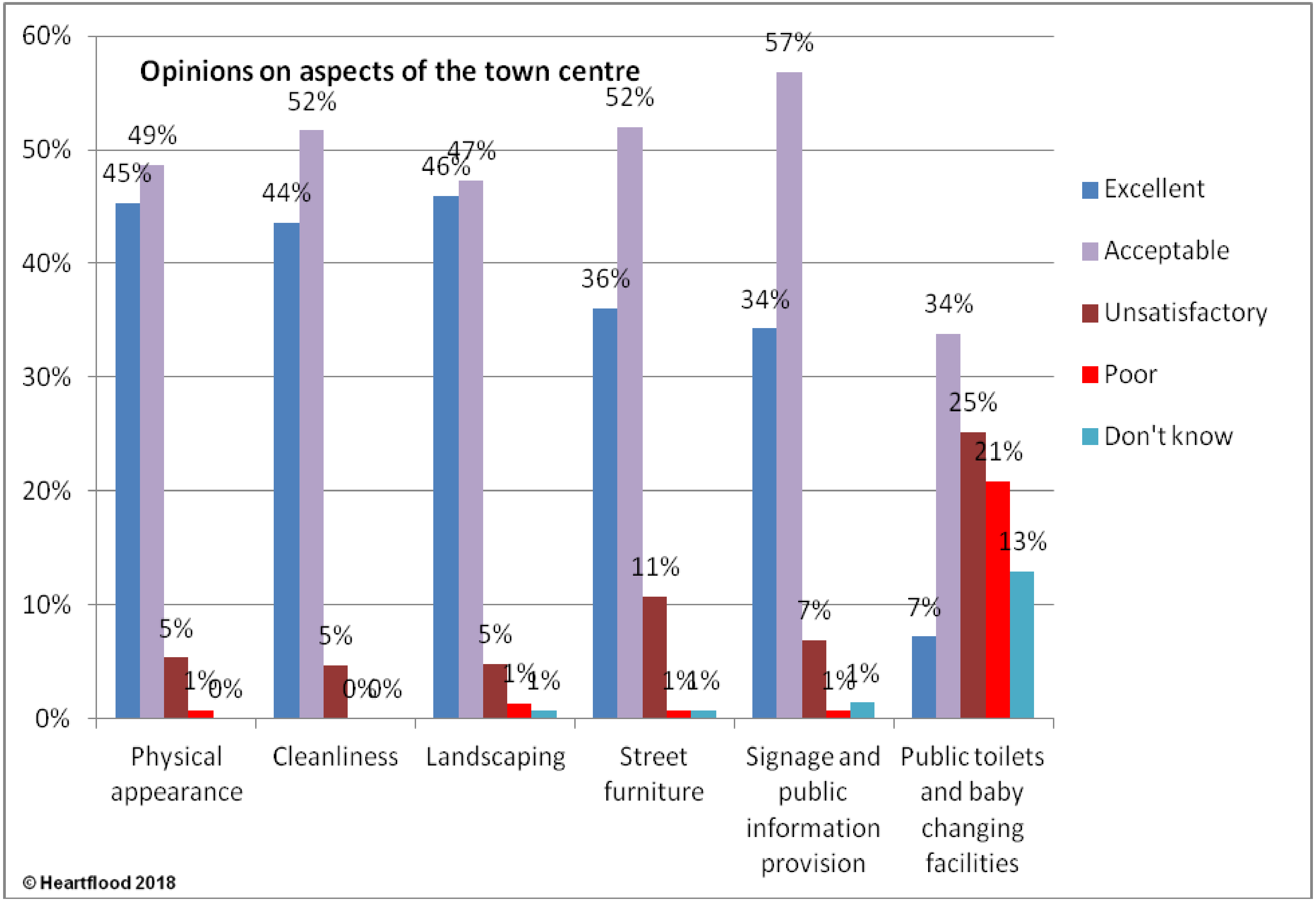

Mode of transport used to get to town centre
61%
28%
11%
On foot & cycle
Car inc taxi
Public transport


Opinions on aspects of the town centre
60%
50%
40%
30%
20%
10%
0%
45%
49%
5%
1%
0%
44%
52%
5%
0%
0%
46%
47%
5%
1%
1%
36%
52%
11%
1%
1%
34%
57%
7%
1%
1%
7%
34%
25%
21%
13%
Physical appearance
Cleanliness
Landscaping
Street furniture
Signage and public information provision
Public toilets and baby changing facilities
Excellent
Acceptable
Unsatisfactory
Poor
Don't know
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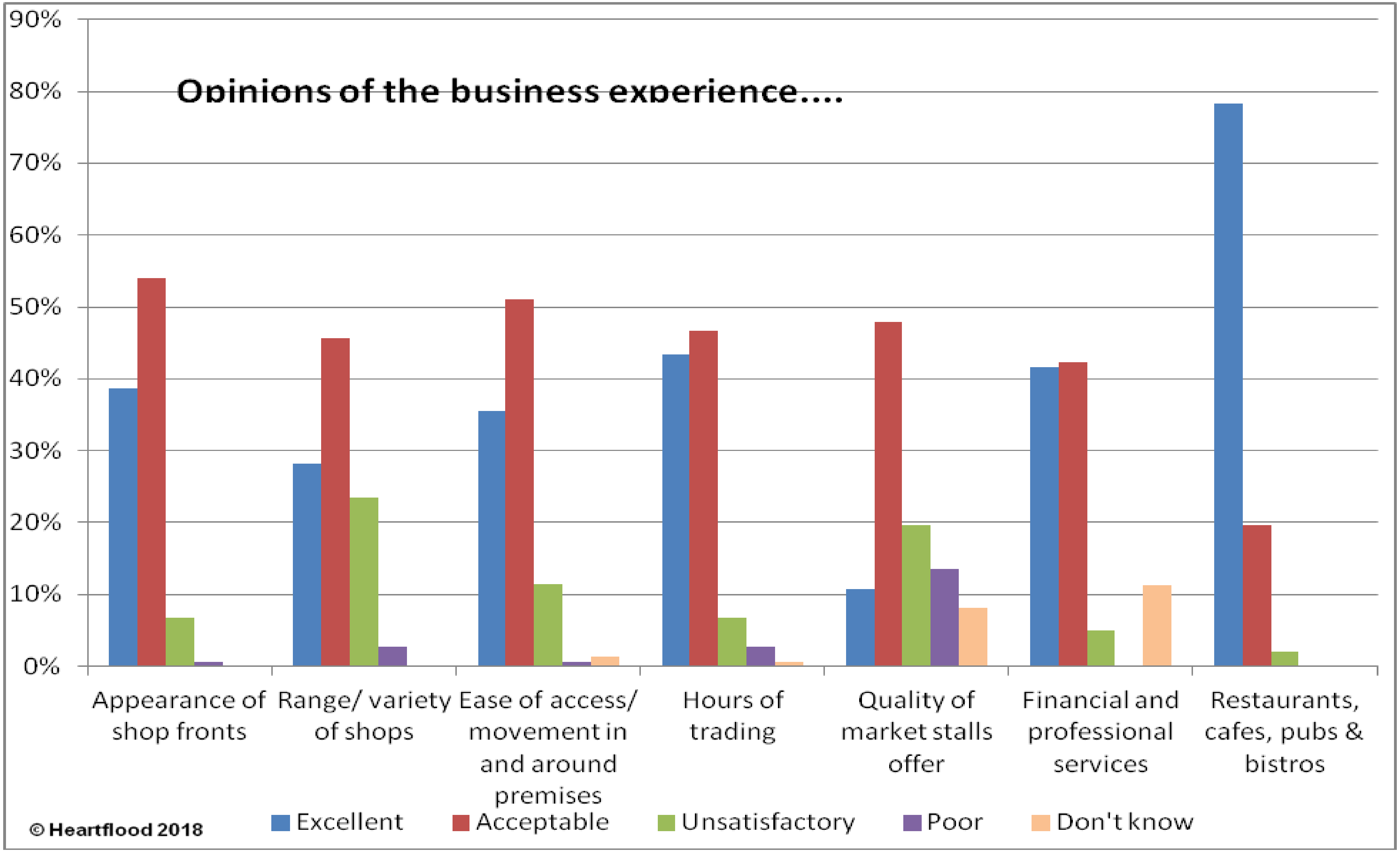
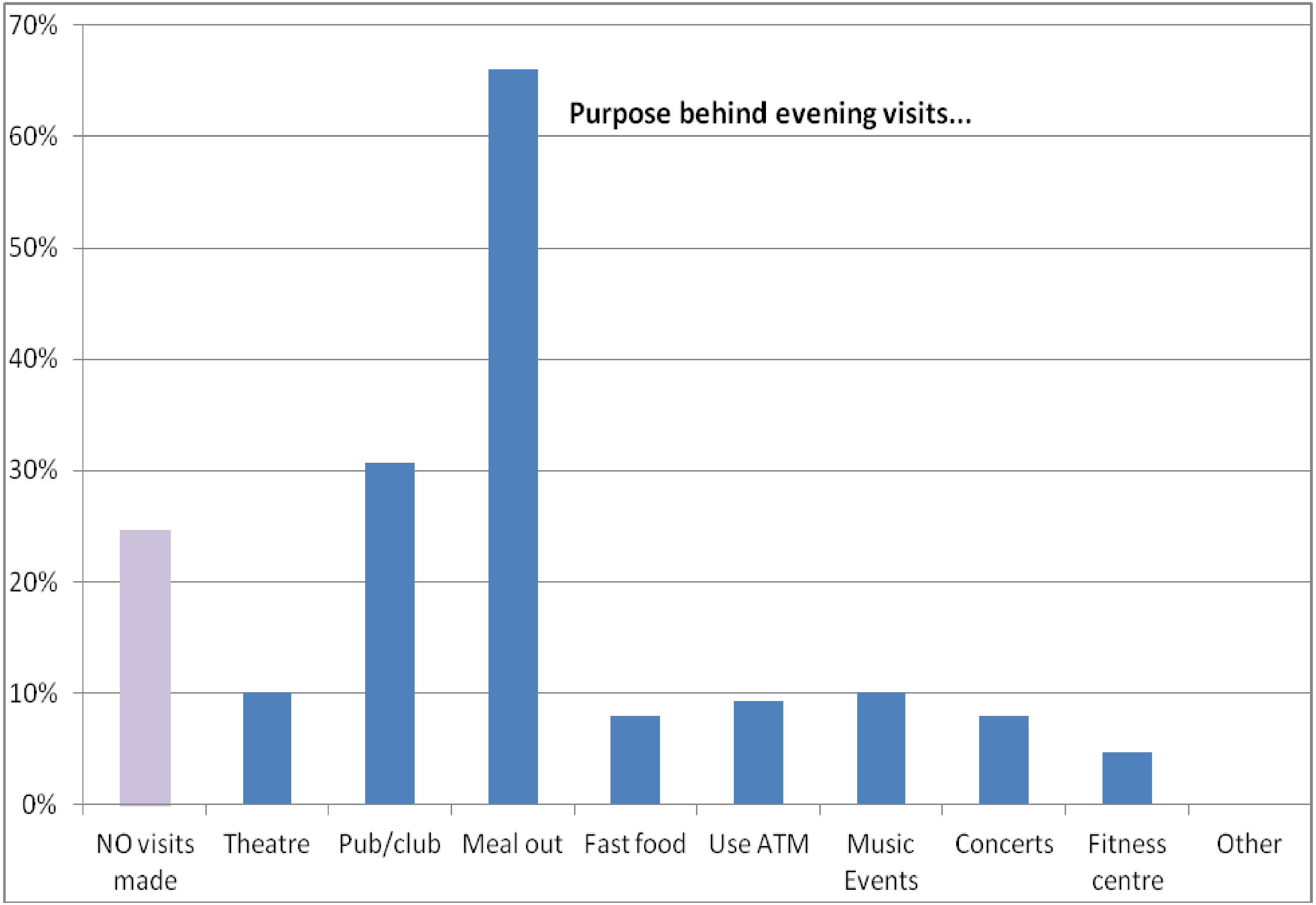
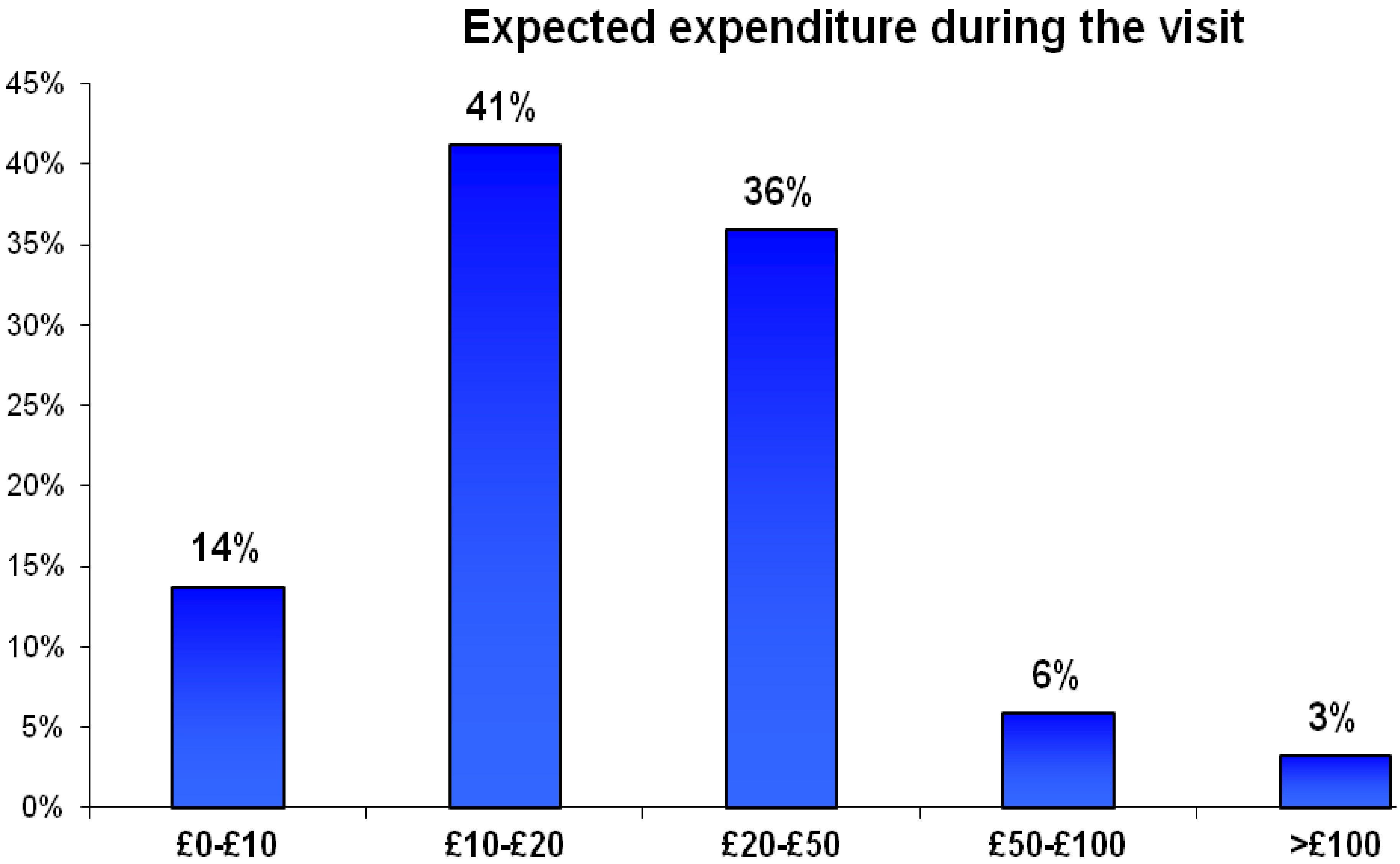

Opinions of the business experience....
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Appearance of shop fronts
Range/ variety of shops
Ease of access/ movement in and around premises
Hours of trading
Quality of market stalls offer
Financial and professional services
Restaurants, cafes, pubs & bistros
Excellent
Acceptable
Unsatisfactory
Poor
Don't know
© Heartflood 2018


Purpose behind evening visits...
70%
60%
50%
40%
30%
20%
10%
0%
NO visits made
Theatre
Pub/club
Meal out
Fast food
Use ATM
Music Events
Concerts
Fitness centre
Other


Expected expenditure during the visit
45%
40%
35%
30%
25%
20%
15%
10%
5%
0%
41%
36%
14%
6%
3%
£0-£10
£10-£20
£20-£50
£50-£100
>£100