Stevenage: Retail & Leisure Capacity Study

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Stevenage BOROUGH COUNCIL

CACI

Contents

Stevenage Town Centre SWOT Analysis

Strengths

- Affluent family catchment
- Low vacancy rate in the town centre
- Easily accessible by car and excellent bus and rail links
- A worker population within the town centre

Weaknesses

- Town centre rundown in places, untidy look and poor public realm
- High proportion of value retail units
- Catering offer not strong to drive additional spend and dwell
- Lack of character and atmosphere in the town

Opportunities

- Increase dwell time in the town through improving the catering facilities (pop up stores, markets)
- To attract the more affluent shoppers from outside Stevenage with an improved tenant mix
- Provide a shuttle bus service link the town with Roaring Meg Retail Park and the Leisure Park

Threats

- Further potential development at Roaring Meg Retail Park
- Stevenage Old Town being the prominent destination for eating out in the area
- The centre continues to just attract value retailers
- Perception if the town fails to change e.g. The Plaza units remain vacant.

1. Introduction & Methodology

Project Scope

- CACI have been commissioned by Stevenage Borough Council in partnership with Applied Planning to carry out a full retail and leisure capacity study within Stevenage. The aim of this study is to determine the level of expenditure that can be supported within Stevenage's catchment and to identify if there is a need for development.

- To carry out this exercise CACI have commissioned exit surveys carried out at Stevenage Town Centre and nearby locations, analysing the ACORN profile of customers, their shopping habits, perceptions of Stevenage and if they utilise Stevenage as a retail destination.

- A full benchmarking exercise both current and aspirational, has also been conducted whereby the retail mix, market position and tenant line up of four benchmark centres has been analysed. From this CACI have then made recommendations as to how the Stevenage Town Centre mix could be changed.

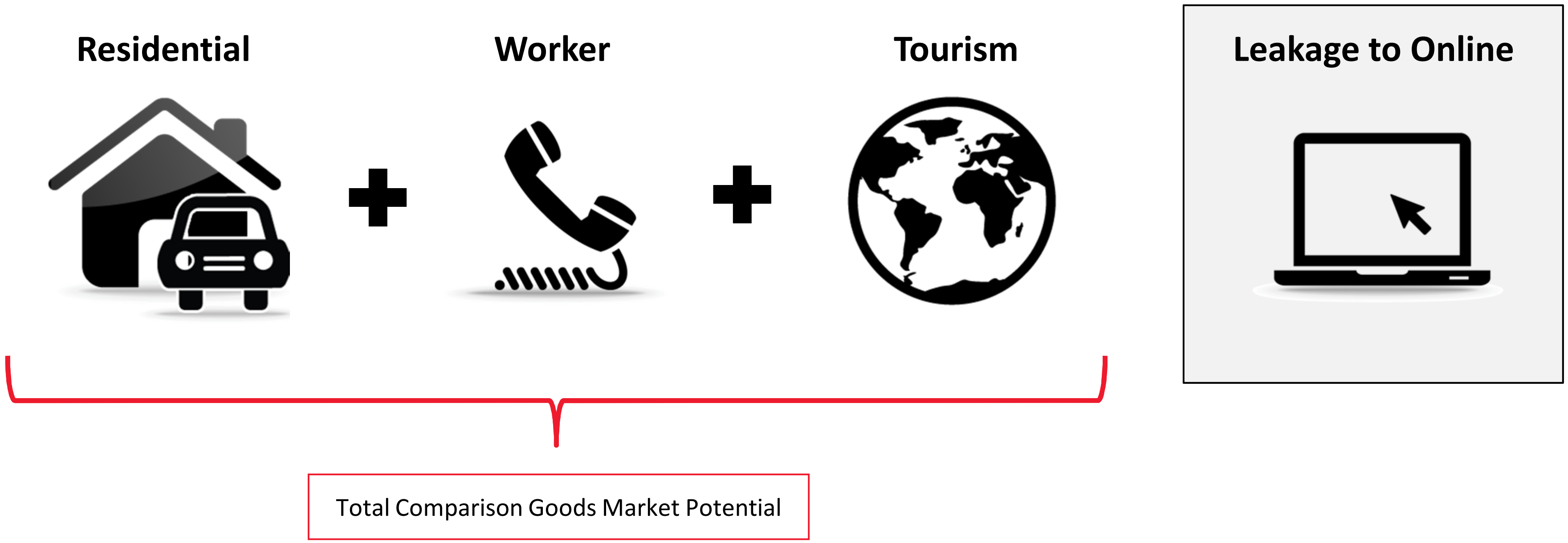
- CACI will utilise their Centre Futures gravity model to define a catchment for Stevenage. Future scenarios have then been run in 2017 with no development and an improved retail mix in the town. Once these catchments have been modelled this report explores the competitive environment, in terms of catchment leakage, and the demographic profile of the catchment, in terms of ACORN profile.

- CACI will then draw together conclusions and recommendations for Stevenage Borough Council.

Overview

- Retail Footprint is the most extensive and expansive retail venue catchment model available.
- It is a gravity model that defines catchments for shopping centres selling Comparison Goods in Great Britain. These catchments are calibrated using actual transaction data from one of the top 4 banks – a universe in excess of 225 million records.
- These catchments overlap because, as in reality, people living in a postal sector will shop at a range of different shopping destinations.
- Retail Footprint calculates comparison expenditure and shopper populations for each venue based on the principles that:
  - People are more likely to visit larger, more attractive venues.
  - People are more likely to visit venues that are easily accessible to them (based on a combination of distance and travel-time).
- This (non-bulky) Comparison Goods model looks specifically at catchments for ‘comparison shopping’ products, such as clothing and footwear, books and DVDs.
- Gravity modelling is based on four general principles, which influence the level of spatial interaction between retail centres:
  - Physical distance to (or time taken to reach) the centre.
  - The ‘attractiveness’ of the centre’s facilities.
  - The degree of intervening opportunities or level of competition.
  - The size of the population within an area.
- Retail Footprint 2012 features over 4,700 venues, generating an overlapping catchment for every centre that identifies the market share every centre has of every post sector within the UK and accurately reflecting the UK retail landscape.

Expenditure Definition



- Retail Footprint 2012 calculates the residential, worker and tourism spend potential for each Retail Footprint centre. This is a more accurate reflection of reality as a centres' turnover is not solely based on residential expenditure.

Comparison Goods Expenditure Categories

- The table shows CACI's definition of Comparison Goods categories. Expenditure figures quoted throughout this report refer to Comparison Goods, unless otherwise stated, and are at 2012 prices.

Retail Sector	Retail Category	Retail Product		
Comparison Goods	**Clothing & Footwear**	Womenswear Menswear Childrenswear Haberdashery	Clothing Materials Accessories Footwear	
	House & Home	China, Glass & Fancy Goods Small Household Electricals Glassware, Tableware & Utensils		
	Leisure Goods	Music & Video Toys & Hobbies Computer Games Consoles Sports Equipment	Books Bikes Leather & Travel	
	Personal Goods	Communications Jewellery Baby Equipment Stationery & Cards		
	Personal Care	Personal Care Electrical Appliances Sunglasses Chemist Goods Other Medical Products	Toiletries Cosmetics & Perfume	
	Durable Goods	Furniture Garden Furniture Floor Coverings Household Textiles	Appliances Tools Garden Tools Other DIY	TV, Audio & Video Cameras & Binoculars Personal Computers Paint & Wallpaper
Convenience Goods	**Convenience Goods**	Provisions Alcohol Tobacco	Newspapers & Magazines Confectionery Household Convenience	
Catering	**Catering**	Restaurants Take Away		

Market Position: Example Retailers

Premium

John Lewis, MONSOON, MISS SIXTY, PRADA, HARVEY NICHOLS, coast, GUCCI

Mass

YOUR M&S, TOPSHOP, All Saints Spitalfields, URBAN OUTFITTERS, GAP, ZARA, H&M, WAREHOUSE

Value

PRIMARK, MATALAN, poundstretcher every penny counts..., Argos, TK maxx, Superdrug, Poundland

Fashion Market Position: Example Retailers

Upper	BURBERRY ESTABLISHED 1856, LOUIS VUITTON, JIMMY CHOO, RALPH LAUREN, VERSACE
Upper Middle	BANANA REPUBLIC, HOUSE OF FRASER, HOBBS, KAREN MILLEN, JAEGER
Middle	GAP, H&M, fcuk®, TOPSHOP, ZARA
Lower Middle	claire's where getting ready is half the fun, new look, H.SAMUEL, Shoe Zone
Lower	Bonmarché, George., PRIMARK®, PEACOCKS

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Economic Confidence

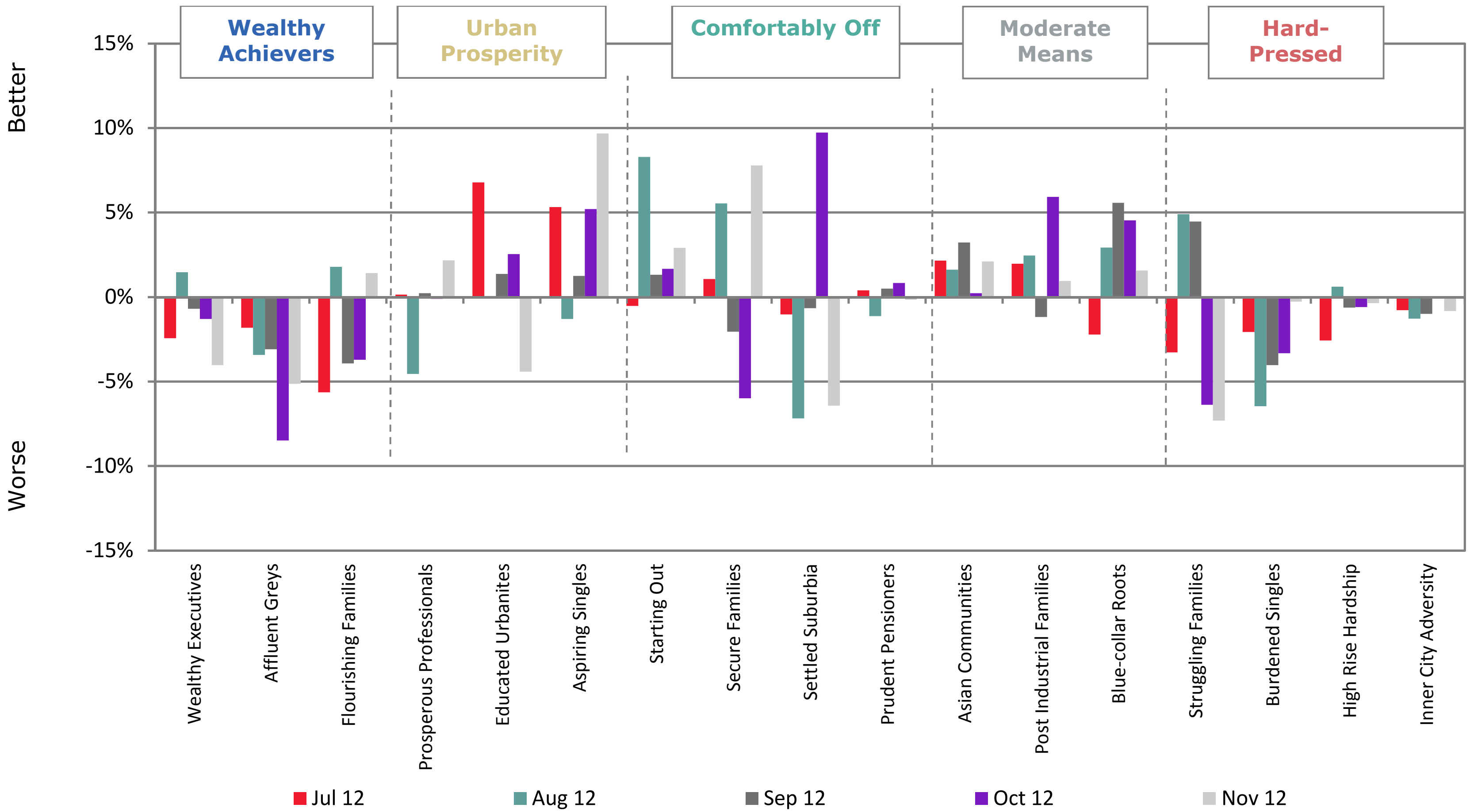
- The country's economic outlook is increasingly polarising along demographic lines, with those at both the top and bottom of the income spectrum nervous about their financial prospects, whilst Middle Britain is showing positive sentiments.

- Firstly, the broad ACORN Category of 'Comfortably Off' has now had a positive outlook for four consecutive months and has seen a steady trend in rising confidence since a low just before last Christmas. This category makes up over 27% of the UK population and, as the bedrock of many of the UK's biggest High Street names including M&S, Next and H Samuel, improving sentiments will bring a little cheer to these retailers. However, a note of caution should be heard in that the largest sub-group, Secure Families, slipped into negative territory in October and November after showing positive sentiments since April. This implies a level of concern amongst middle-class families as they began to plan their Christmas spending plans.

- Retailers such as TK Maxx, ASDA and The Fragrance Shop will be buoyed by the news that all three of the Groups within the Moderate Means Category have seen positive sentiments for each of the last three months. The broad Moderate Means category was in negative territory at this time last year, but has stayed in positive territory for the whole of 2012. Despite a drop in confidence in the early summer these largely working class families are now showing a level of confidence in their financial circumstances which retailers will hope to see reflected through their tills.

Source: CACI, The BPS 2012

Economic Confidence



Q. Thinking about your financial situation at present, how do you think it is likely to have changed, if at all, in three months time?
Source: CACI, The BPS 2012

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2. 2012 Stevenage

2.1 Catchment Definition

Stevenage: Current Status

Stevenage is currently classed as a 'Mall Dominated Town'

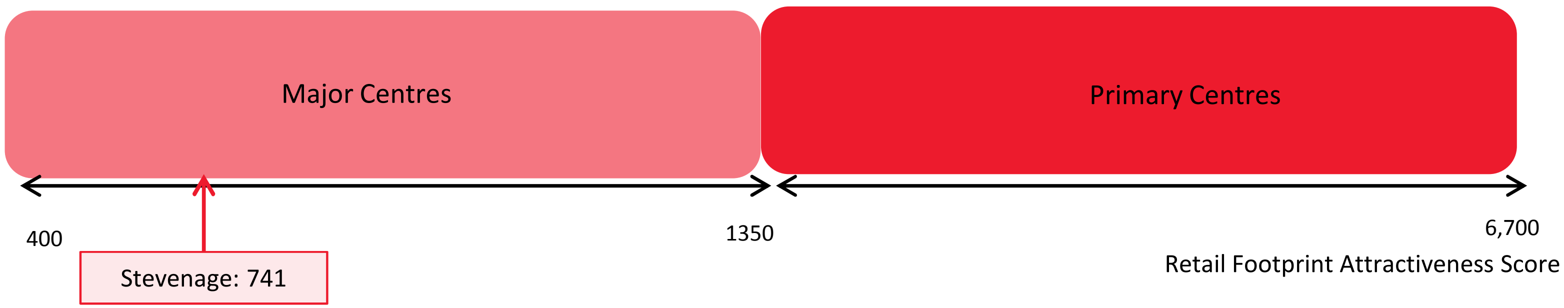
- CACI classify all 4,700+ retail centres into a two tier hierarchy. This consists of 12 major classes covering both high-street and out-of-town centres. The major class generally describes the size and geography of the centre and the minor class the retail mix and further detail.
- Stevenage is currently classed as a 'Mall Dominated Town' in Retail Footprint, which forms part of the 'Major Centres' category. It has a Retail Footprint score of 741.
- 'Major Centres' are large 'traditional' High Street centres located in the middle of either large towns or 'secondary' regional cities. These are the second tier in the regional shopping hierarchy in terms of both the number of comparison outlets and shopper numbers. Major Centres have an average Retail Footprint attractiveness score of 807 and market share of 8.5%. 100 retail centres are classified as Major Centres and average comparison goods expenditure is £212 million.
- 'Mall Dominated Tows' represents in-town retail centres, with a large proportion of their retail provision falling within shopping centres. There are 11 centres within this class, and as these are generally New Towns they offer easy car access to their town centres, with considerable car parking provision attracting shoppers from considerable distances. Examples of these centres include Crawley, Telford, Redditch, Stevenage and East Kilbride.

Major Class Name	Minor Class Name	Example Centres
Primary Centres	International Centres	London - West End
Primary Centres	National Centres	Glasgow, Birmingham, Manchester
Primary Centres	Principal Centres	Leeds, Cardiff, Bristol
Primary Centres	Quality Regional Centres	Bath, Southampton, Guildford
Primary Centres	Average Regional	Hull, Plymouth, Ipswich
Major Centres	Premium Centres	Tunbridge Wells, Harrogate, Canterbury
Major Centres	Quality Centres	Maidstone, Salisbury, High Wycombe
Major Centres	Average Centres	Doncaster, Stirling, Stoke-on-Trent - Hanley
Major Centres	Lower Average Centres	Southend-on-Sea, Poole and Burnley
Major Centres	Value Centres	Great Yarmouth, Barnsley, Corby
Major Centres	Town Centre Malls	Milton Keynes
Major Centres	Mall-Dominated Town	Crawley, Telford, Stevenage
Conurbation Towns	Medium Conurbation	Stockport, Ashton-under-Lyne, Paisley
Conurbation Towns	Small Conurbation	Bootle, North Shields, Dudley
Conurbation Towns	Premium London	Croydon, Kingston upon Thames, Bromley
Conurbation Towns	Quality London	Richmond - Surrey, Ealing Broadway, Wimbledon
Conurbation Towns	London Conurbation	Romford, Bexleyheath, Hounslow
Metropolitan Towns	Quality Metropolitan	Beverley, Marlow, Wilmslow
Metropolitan Towns	Value Metropolitan	Redcar, Hinckley, Havant
Regional Towns	Quality Regional Towns	Winchester, Stratford-upon-Avon, Cirencester
Regional Towns	Medium Regional Towns	Yeovil, Newark-on-Trent, Dunfermline
Regional Towns	Small Regional Towns	St Andrews, Berwick-upon-Tweed, Petersfield
Urban Centres	Medium Conurbation	Wythenshawe, Edinburgh - Leith, Leeds - Headingley
Urban Centres	Small Conurbation Urban	Birmingham - Handsworth, Bristol - Westbury-on-Trym
Urban Centres	Medium Non-	Westcliff-on-Sea, Cosham, York - Acomb
Urban Centres	Small Non-Conurbation	Shoeburyness, Reading - Lower Earley
Urban Centres	Larger London Non-	London - Knightsbridge, London - Covent Garden
Urban Centres	Premium London Non-	London - Canary Wharf, City of London - Cheapside
Urban Centres	Quality London Non-	City of London - Fenchurch Street, City of London - Broadgate
Urban Centres	Average London Non-	London – Victoria, London – Paddington
Urban Centres	Premium London	London – Kensington, London - Hampstead
Urban Centres	Larger London Urban	London – Hammersmith, London – Camden Town
Urban Centres	Average Inner London	London – Muswell Hill, London - West Hampstead
Urban Centres	Value Inner London	London - Wood Green, London - Peckham
Urban Centres	Outer London Urban	Wembley, Ruislip, East Sheen
Local Centres	Better Local Centres	Bakewell, Wetherby, Thame
Local Centres	Average Local Centres	Consett, Alloa, Stowmarket
Local Centres	Small Local Centres	Market Deeping, Hayling Island, Kidlington
Rural Centres	Large Rural Centres	Haverhill, Ebbw Vale, Fort William
Rural Centres	Medium Rural Centres	Prestatyn, Axminster, Stow-on-the-Wold
Rural Centres	Small Rural Centres	Perranporth, Kirkcudbright, Bourton-on-the-Water

Stevenage 2012: Position within Class

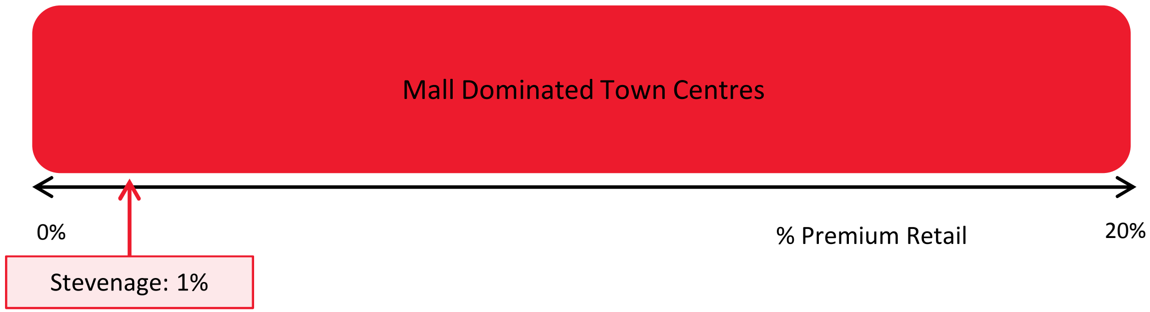
Stevenage has a lower attractiveness score and market share compared to its class average

Retail Footprint Score



- Major Centres have an average Retail Footprint attractiveness score of 789 and a catchment market share of 9.6%. Stevenage has a slightly lower attractiveness score than the average of all Major Centres (741). The market share that the centre achieves is also below average (7.8%) reflecting the competitive environment in which Stevenage is trading.

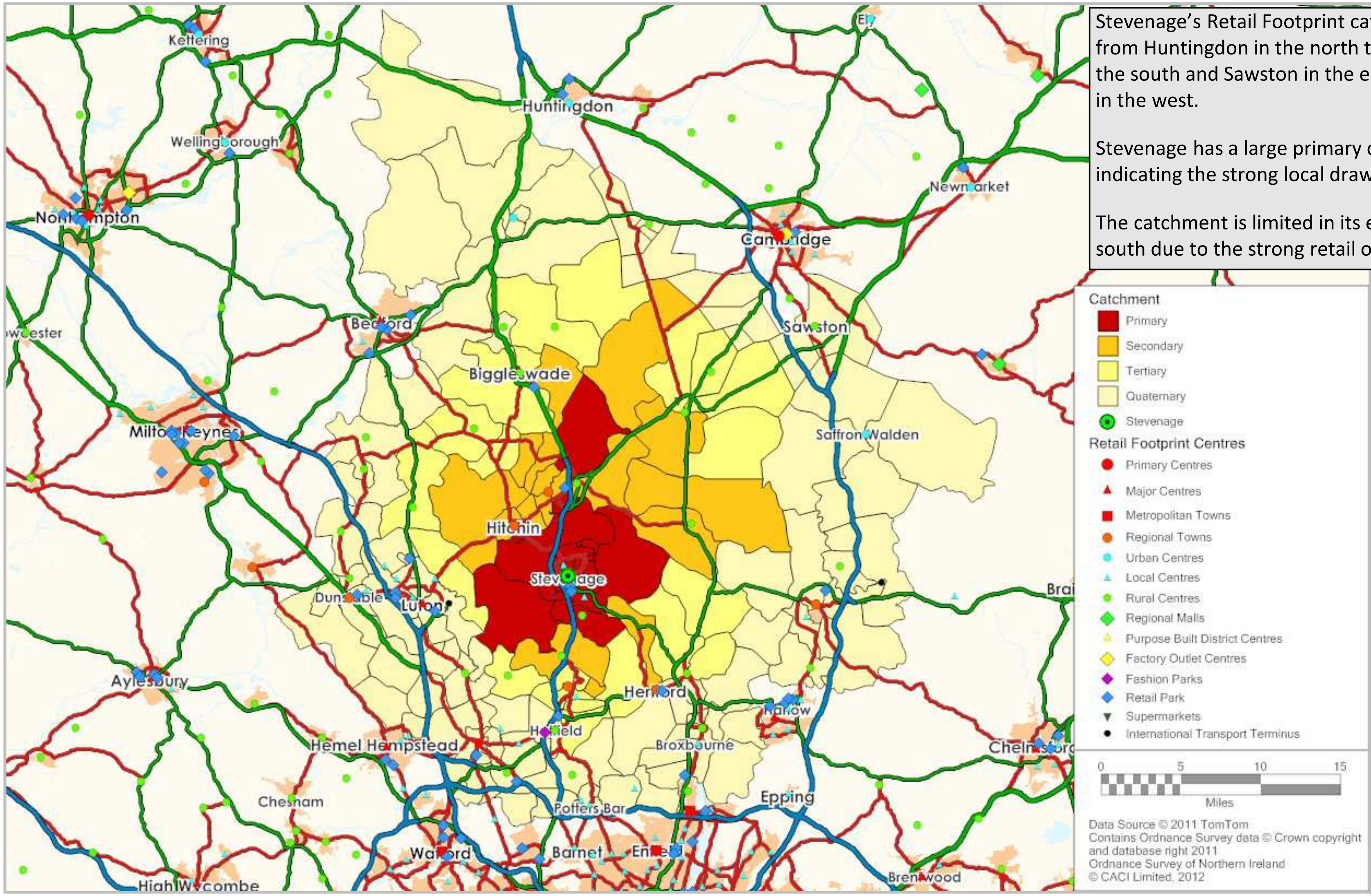
Premium Retailer Representation



- Stevenage’s minor class is Mall Dominated Town Centres. The Premium retailer representation is between 0% and 20%. Basingstoke has the highest Premium retailer representation of all Mall Dominated Town Centres. Stevenage has just 1% Premium retail.

Catchment Map

Stevenage's catchment covers a large area of Hertfordshire



Stevenage's Retail Footprint catchment extends from Huntingdon in the north to Potters Bar in the south and Sawston in the east to Dunstable in the west.

Stevenage has a large primary catchment, indicating the strong local draw of the centre.

The catchment is limited in its expanse to the south due to the strong retail offer in London.

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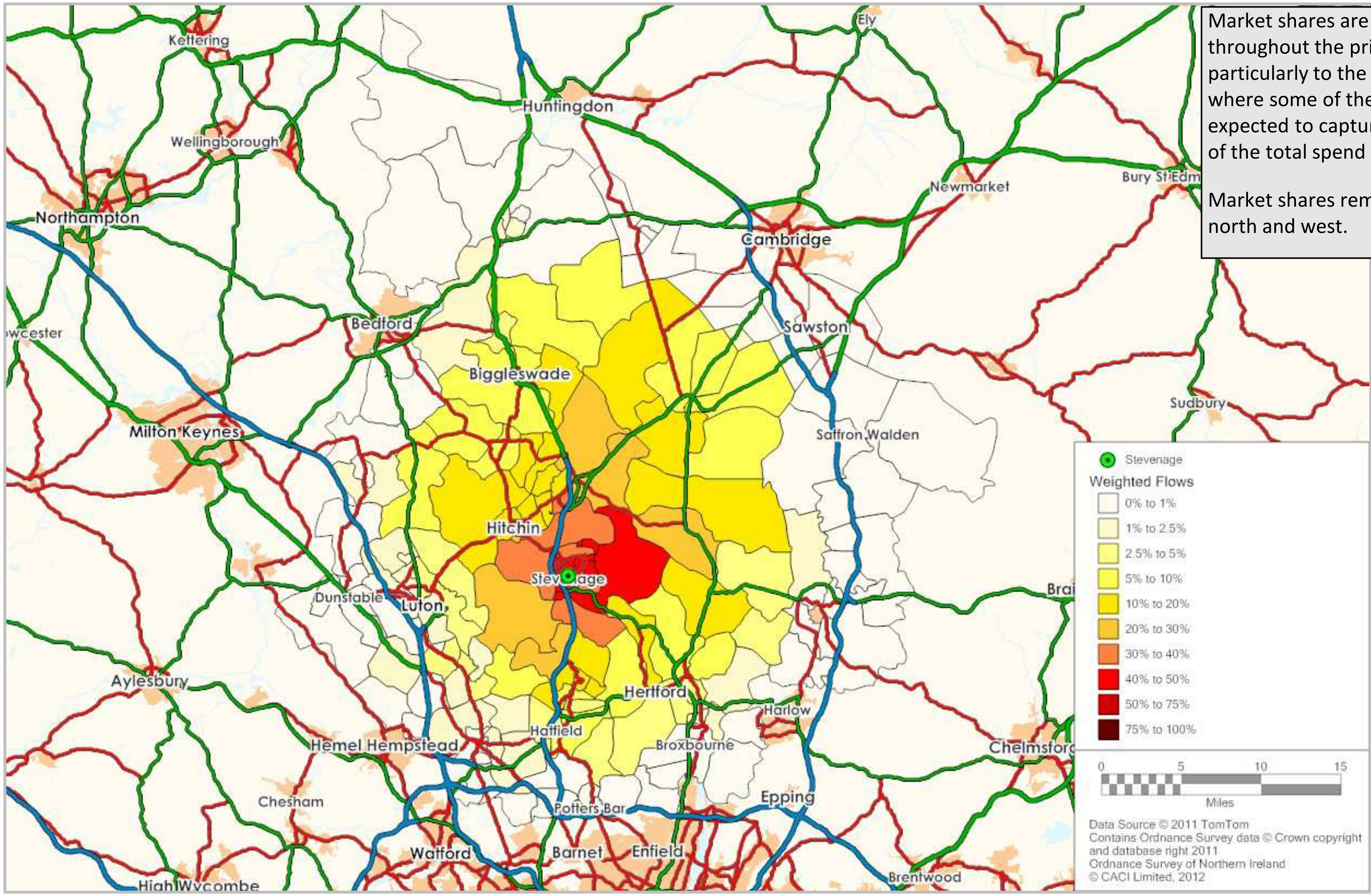
Market Shares Map

High market shares in Stevenage indicating the strong local draw of the centre



Market shares are strong throughout the primary catchment, particularly to the east of Stevenage, where some of the postal sectors are expected to capture in excess of 40% of the total spend available.

Market shares remain strong to the north and west.

Catchment Summary Table

Stevenage has a Comparison Goods Market Potential of £213.9 million

Catchment	Total Population	Total Comparison Goods Expenditure by Residents (£m)	Shopper Population	Comparison Goods Market Potential (£m)	Market Share (%)
Primary	130,103	£281.3	51,442	£111.4	39.6%
Secondary	142,010	£298.5	24,032	£50.4	16.9%
Core Catchment	**272,113**	**£579.8**	**75,474**	**£161.9**	**27.9%**
Tertiary	195,209	£412.4	14,503	£30.7	7.4%
Quaternary	840,590	£1,761.7	10,168	£21.3	1.2%
Total Catchment	**1,307,912**	**£2,753.9**	**100,146**	**£213.9**	**7.8%**

- The above table shows the population and Comparison Goods expenditure across the Stevenage catchment. The total catchment contains over 1.3 million people with total annual Comparison Goods expenditure of over £2.7 billion. Stevenage is expected to capture 7.8% of this expenditure resulting in a Comparison Goods market potential of £213.9 million. The average market share for a centre of Stevenage's class is 9.6% so the centre is capturing less spend from its catchment than other similar centres. This is likely as much a function of competition as it is quality of offer in the centre.
- Market shares are highest in the primary catchment where Stevenage is expected to capture 39.6% of the £281.3 million available, equating to a market potential of £111.4 million. This 39.6% market share is less than the class average of 43.6%, again reflecting the levels of competition in the catchment area.
- The secondary catchment contributes a further £50.4 million in market potential capturing a 16.9% market share. The tertiary and quaternary catchments contain less frequent shoppers and as such market shares are lower, 7.4% and 1.2% respectively. These catchment areas contribute a further £30.7 million and £21.3 million in market potential.

Category Expenditure Table

Average household Comparison Goods spend for all categories is above the East of England average

Category	Expenditure per Annum (£m)	Annual Household Spend (£)	Household Spend Index v	
			UK	East of England
Residential Spend				
Clothing & Footwear	£54.8	£1,291.1	101	104
House & Home	£9.3	£218.3	113	103
Leisure Goods	£41.6	£979.9	112	107
Personal Goods	£11.1	£260.9	99	106
Personal Care	£25.6	£602.3	107	104
Durable Goods	£71.5	£1,681.9	118	105
Comparison Goods	**£213.9**	**£5,034.3**	**110**	**105**
Convenience	£183.9	£4,329.9	99	101
Catering	£60.1	£1,415.8	105	102
Total Retail Spend	**£457.9**	**£10,780.0**	**105**	**103**
Tourist Spend	**£3.0**		**N/A**	
Worker Spend	**£3.5**			

Source: Retail Footprint 2012

- Stevenage has a Comparison Goods market potential of £213.9 million, once Convenience and Catering are included this rises to £457.9 million.
- The average household spends more than the East of England average on Comparison Goods (£5,034.3, +5%), including spending 4% and 6% more respectively on clothing & footwear and Personal Goods.
- Average household spend is particularly high for Leisure Goods, which stands at 7% higher than the East of England average and 12% higher than the UK average.
- With the exception of Personal Goods and Convenience, spend is also higher than the UK average for all categories.

Leakage

Stevenage has the highest market share within its Core catchment and Total catchment

Retail Footprint Centre	Retail Footprint Class	RF Score	Distance (Miles)	Market Share (Core)	Market Share (Total)
Stevenage	**Mall-Dominated Town Centres**	**741**	**0.0**	**27.9%**	**7.8%**
Luton	Lower Average Centres	881	9.3	1.9%	7.4%
St Albans	Premium Centres	874	11.9	1.6%	5.2%
Milton Keynes	Town Centre Malls	1,350	25.6	1.0%	5.0%
West End	International Centres	6,758	27.0	6.2%	4.6%
Cambridge	Quality Regional Centres	1,548	25.0	1.8%	4.4%
Bishop's Stortford	Value Metropolitan Towns	542	15.7	0.4%	2.9%
Welwyn Garden City	Quality Metropolitan Towns	608	7.0	3.8%	2.9%
Hitchin	Value Metropolitan Towns	480	4.5	9.7%	2.8%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	9.9	2.6%	2.8%
Harlow	Mall-Dominated Town Centres	689	15.7	0.7%	2.6%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	0.7	9.1%	2.5%
Brent Cross	London Regional Malls	937	22.6	1.1%	2.5%
Dunstable	Value Metropolitan Towns	350	13.7	0.0%	2.4%
Covent Garden	Larger London Non-Residential Centres	1,493	27.1	3.8%	2.1%
Luton - Hatters Way Retail Park	Large Bulky Goods Retail Parks	162	10.8	0.1%	2.0%
Westfield Stratford City	London Regional Malls	1,428	26.2	1.9%	1.9%
Bedford	Lower Average Centres	770	19.8	0.3%	1.7%
Letchworth	Value Metropolitan Towns	274	5.4	6.8%	1.6%
Hemel Hempstead	Lower Average Centres	816	15.6	0.1%	1.5%

Source: Retail Footprint 2012

- The adjacent table shows Stevenage's main competitors in terms of the market share they achieve within its Total Catchment.
- Stevenage achieves 27.9% market share of its Core catchment (where 75% of Stevenage's trade originates) but this figure drops to 7.8% across the Total catchment meaning that 92.2% of spend in the catchment is spent in other retail destinations.
- Within the Total catchment Luton is the main competitor drawing 7.4% of the share from Stevenage's catchment.
- Within the Core Catchment of Stevenage the main competing destinations are Hitchin (9.7%) and Roaring Meg Retail Park (9.1%).

Residential Retail Footprint Ranking

Stevenage ranks 98th out of over 4,000 Retail Footprint Centres

Rank	Centre Name	RF Minor Class	RF Score	Comparison Goods Market Potential (£m)		
				Residential	Tourist	Worker
88	Stockport	Medium Conurbation Towns	880	£227.2	£0.9	£8.4
89	Darlington	Lower Average Centres	1,000	£224.8	£6.4	£8.6
90	Wakefield	Average Regional Centres	1,010	£224.8	£4.4	£8.1
91	Islington	Premium London Centres	693	£223.4	£34.8	£12.6
92	Bolton	Medium Conurbation Towns	971	£222.5	£21.2	£7.2
93	Kensington	Premium London Centres	821	£219.4	£65.2	£14.1
94	Basildon	Mall-Dominated TC	893	£218.0	£1.4	£3.9
95	Batley - Birstall Shopping Park	Shopping Parks	525	£217.0	£1.6	£0.3
96	Broadstairs - Westwood Cross	Major Shopping Parks	683	£215.0	£5.7	£0.7
97	York - McArthurGlen	Major FOCs Premium Dom	589	£214.3	£3.2	£0.1
98	**Stevenage**	**Mall-Dominated TC**	**741**	**£213.9**	**£3.0**	**£3.5**
99	Hereford	Average Centres	841	£213.7	£40.7	£6.4
100	Luton	Lower Average Centres	881	£213.4	£4.3	£14.3
101	Swindon - McArthurGlen	Major FOCs Premium Brands	506	£213.4	£10.9	£0.2
102	Sunderland	Average Centres	994	£211.8	£22.1	£6.6
103	Braintree Designer Outlet Centre	Major FOCs Premium Brands	417	£210.2	£4.6	£0.1
104	Uxbridge	London Conurbation Towns	935	£209.6	£0.5	£9.6
105	Worthing	Average Centres	941	£209.4	£20.0	£10.8
106	Burton-on-Trent	Lower Average Centres	1,004	£209.0	£16.5	£5.7
107	Lancaster	Average Centres	783	£207.8	£16.5	£7.3
108	Shrewsbury	Premium Centres	981	£207.5	£24.3	£4.9

Source: Retail Footprint 2012

- Stevenage ranks 98th out of over 4,000 Retail Footprint centres based on Residential Comparison Goods market potential.
- It sits just above Hereford and Luton and below Basildon and Bolton in terms of residential Comparison Goods Market Potential.

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East of England Retail Footprint Ranking

Stevenage is the 11th largest centre in the East of England

Rank	Centre Name	RF Minor Class	RF Score	Comparison Goods Market Potential (£m)		
				Residential	Tourist	Worker
1	Norwich	Principal Centres	2,154	£810.0	£113.5	£18.3
2	Thurrock Lakeside	Outer London Regional Malls	1,138	£512.9	£21.3	£1.3
3	Cambridge	Quality Regional Centres	1,548	£460.2	£160.8	£13.8
4	Watford	Quality London Conurbation Towns	1,237	£412.5	£12.3	£16.9
5	Ipswich	Average Regional Centres	1,098	£392.4	£41.8	£16.5
6	Colchester	Quality Centres	1,036	£347.3	£66.7	£9.0
7	Peterborough	Quality Regional Centres	1,210	£338.8	£20.5	£13.8
8	Chelmsford	Quality Centres	1,033	£278.7	£24.2	£21.1
9	Bury St Edmunds	Quality Centres	880	£241.0	£42.3	£7.1
10	Basildon	Mall-Dominated Town Centres	893	£218.0	£1.4	£3.9
11	**Stevenage**	**Mall-Dominated Town Centres**	**741**	**£213.9**	**£3.0**	**£3.5**
12	Luton	Lower Average Centres	881	£213.4	£4.3	£14.3
13	Braintree Designer OC	Major FOCs Premium Brands	417	£210.2	£4.6	£0.1
14	Bedford	Lower Average Centres	770	£202.8	£15.3	£7.5
15	Southend-on-Sea	Lower Average Centres	882	£198.7	£46.5	£7.5
16	St Albans	Premium Centres	874	£185.8	£42.5	£8.3
17	Harlow	Mall-Dominated Town Centres	689	£174.3	£1.0	£2.6
18	Cambridge - Cambridge RP	Shopping Parks	462	£142.8	£0.1	£0.9
19	Hemel Hempstead	Lower Average Centres	816	£141.2	£2.7	£4.6
20	King's Lynn	Lower Average Centres	843	£139.2	£49.3	£5.5

Source: Retail Footprint 2012

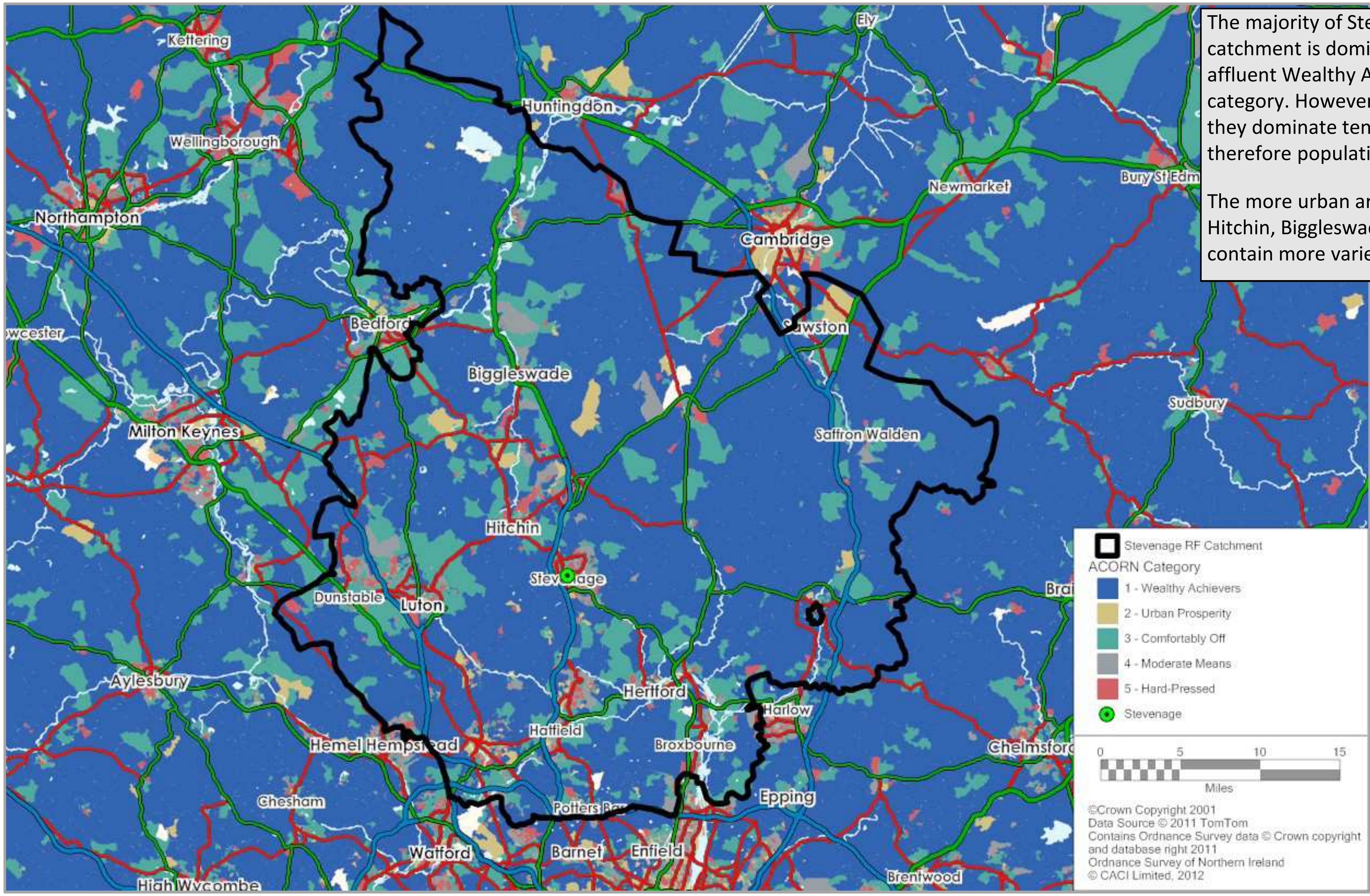
- Stevenage is the 11th largest RF centre out of 365 centres in the East of England.

2. 2012 Stevenage

2.2 ACORN Analysis

ACORN Category Map

Rural areas surrounding Stevenage contain Wealthy Achiever and Comfortably Off households

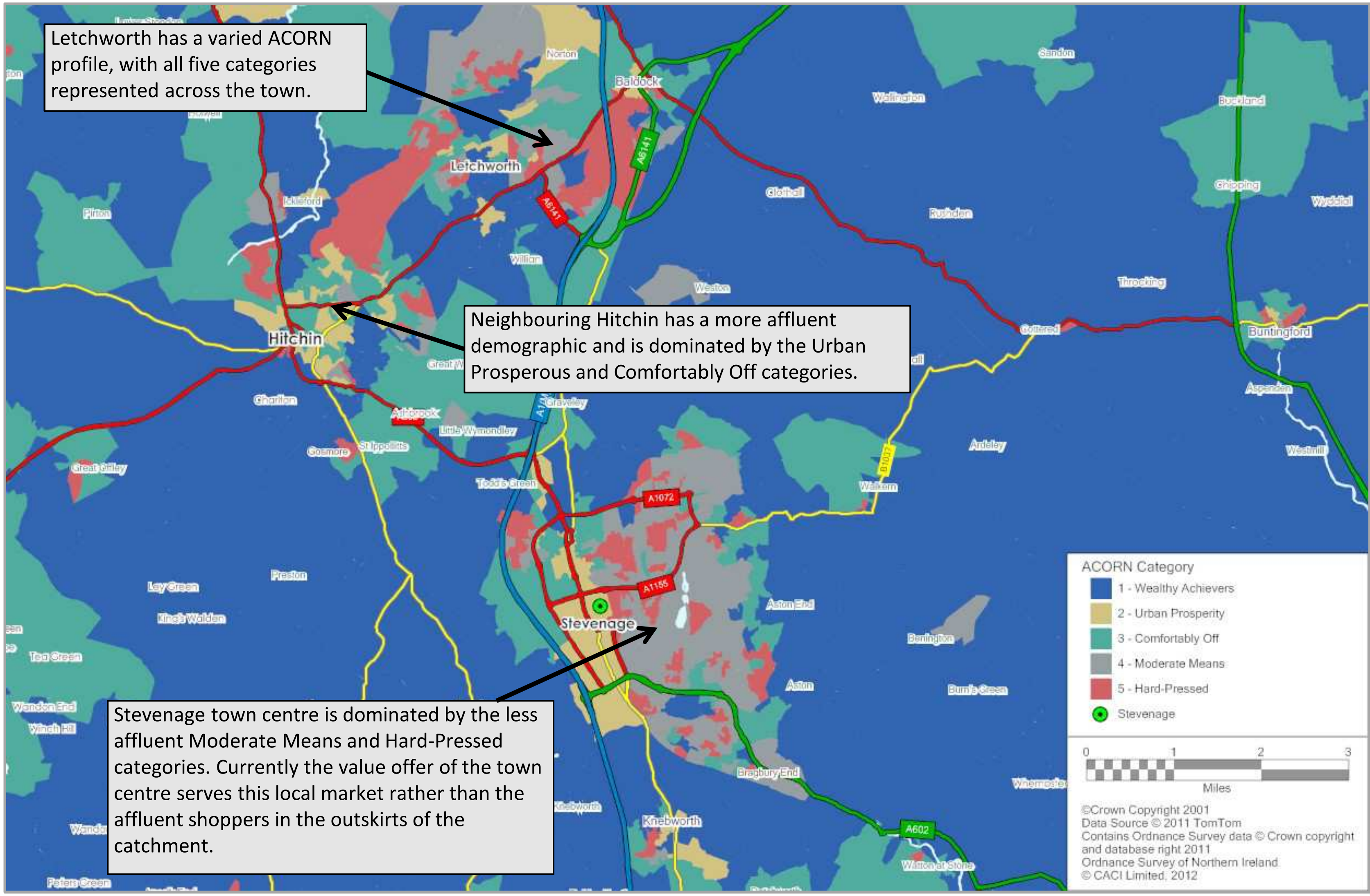


The majority of Stevenage's catchment is dominated by the affluent Wealthy Achiever ACORN category. However, the areas where they dominate tend to be rural therefore population density is low.

The more urban areas of Stevenage, Hitchin, Biggleswade and Hertford contain more varied ACORN profiles.

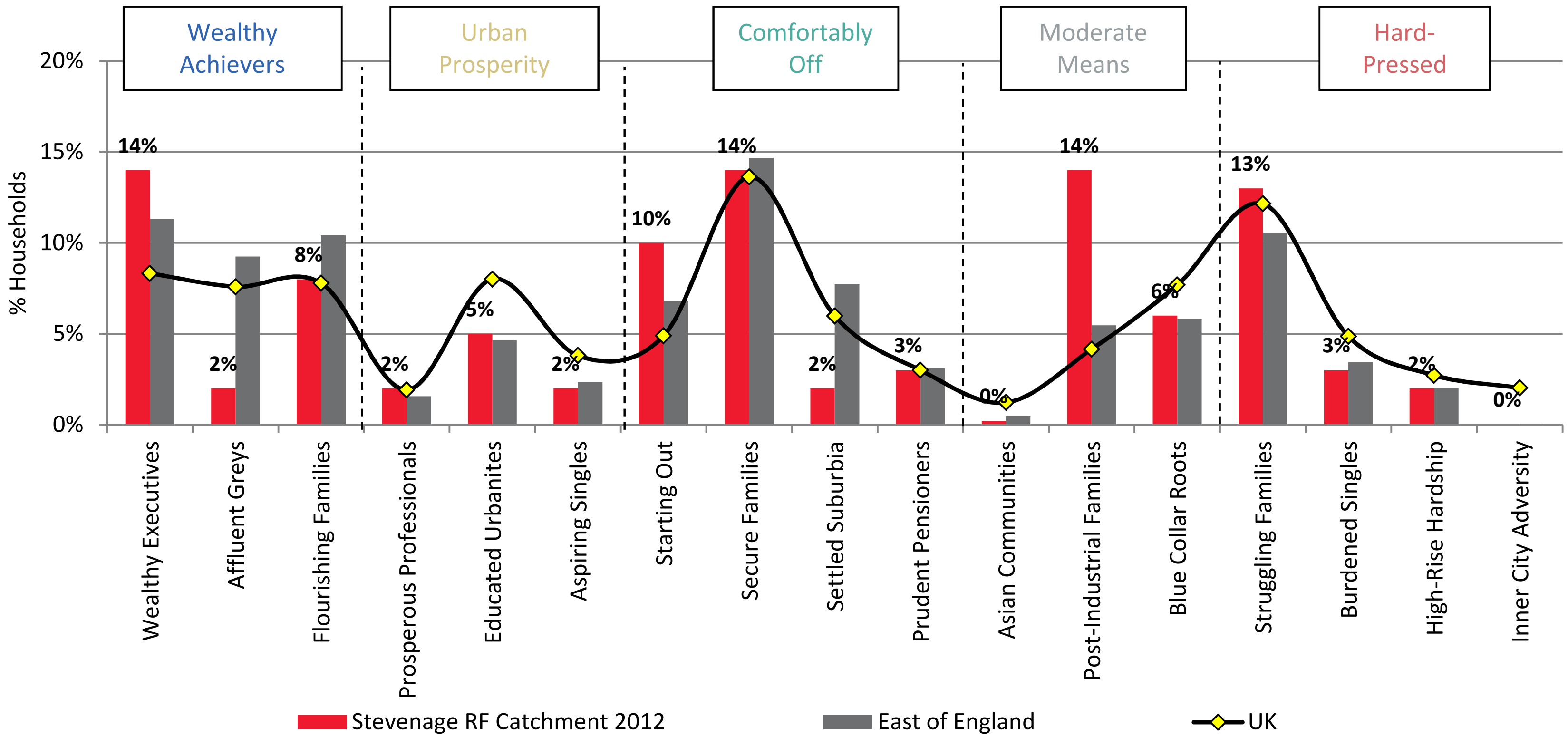
ACORN Category Map

Stevenage dominated by the less affluent Moderate Means households



ACORN Profile

Catchment has a high proportion of family ACORN groups of varying affluence



- The dominant groups in the catchment are the Wealthy Executives (14%), the Secure Families (14%), Post-Industrial Families (14%) and Struggling Families (13%). These groups are of varying affluence levels but it is the less affluent Post-Industrial Families and Struggling Families (13%) that are over represented; the Post-Industrial Families, who make up 14% of the catchment only account for 5% of the households in the East of England and Struggling Families, who make up 13% of the catchment, make up 11% of households in the East of England.
- These less affluent groups are found in the largest volumes in Stevenage itself and it is these shoppers that the centre is currently appealing to. The more affluent residents in the outer catchments will prefer a very different retail offer and are likely to be choosing to shop elsewhere.

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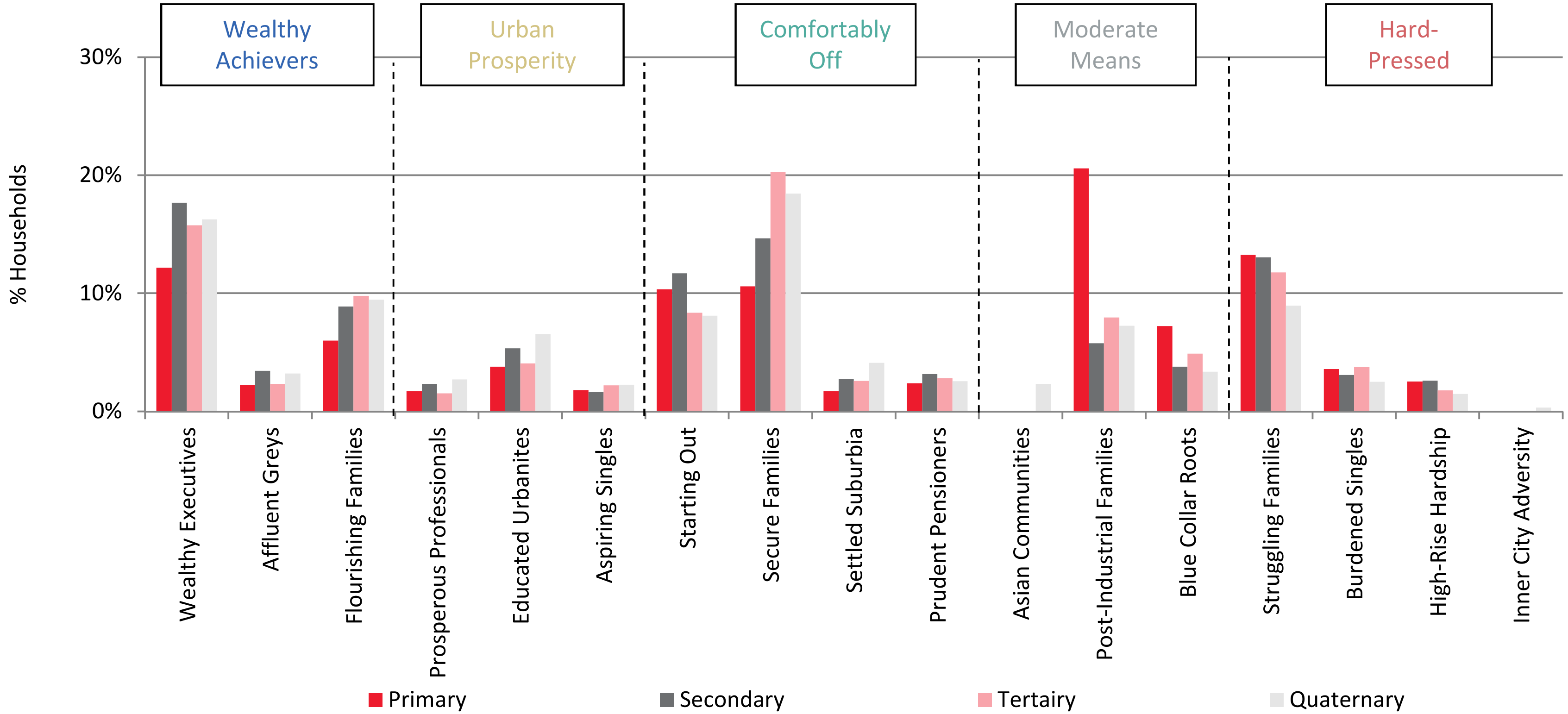
ACORN Profile: PSTQ

Primary catchment has a high proportion of Post-Industrial Families



- The above graph demonstrates the ACORN profile for the catchments in the Stevenage Retail Footprint catchment.
- The primary catchment has a significantly higher proportion of Post-Industrial Families (21%) compared to the secondary, tertiary and quaternary catchments.
- The greatest proportion of Wealthy Executives is found within the secondary catchment (18%).

Group A: Wealthy Executives

Key Catering

Carluccio's, Patisserie Valerie (London Est. 1926), Loch Fyne Restaurants

Key Retail

Russell&Bromley, John Lewis, Harvey Nichols, L'Occitane en Provence, Coast

Readership

The Times, Gardeners' World magazine, Telegraph

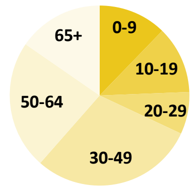
Lifestyle

National Trust, Laithwaites Wine (Discover Better), Titleist, Bupa

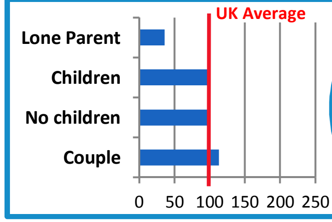
- Wealthy Executives are some of the **most affluent people** in the UK, living in large detached houses in wealthy high-status suburban, rural and semi-rural areas of the country. These are very **well-educated** individuals employed in senior managerial and professional occupations, and **incomes are high** as are levels of **savings and investments**. Households are a mix of middle-aged families with teenage children, empty nesters and wealthy retired. Car is the dominant mode of transport and many households have **two or more cars.**

- They **spend more than most** on their health, education for their children, their home and recreation. **Golf** is a common leisure pursuit and membership of the **National Trust** is popular. They read the **quality broadsheets** and may subscribe to home, gardening and cooking magazines. Wealthy Executives are confident users of the internet and **buy wine, books and furnishings online.**

Age



Family Type



Household

Average Income:
£52,500

Average House Price:
£401,000

CCI|Commercial in Confidence

CACI

Group H: Secure Families

Key Catering

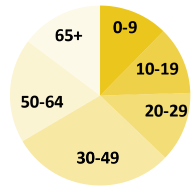
Key Retail

Readership

Lifestyle

This group comprises **home-owning families** living comfortably in suburban and semi-rural locations. These people either work in **middle management** or clerical roles and the main income is often supplemented by women working part time, so **earnings are above average**. Households are typically three or four bedroom houses, occupied by families with **young children, teenagers or even young adults** who have not yet left home. These areas will also include some empty nesters.

Secure Families tend to **spend more on recreation, culture and health**. They are reasonably confident online, where clothing, home furnishings, garden equipment, food and wine may be purchased. **Nectar or Tesco Clubcard** use is prevalent. They have the money to take **regular trips abroad**, particularly package holidays to Europe and the Mediterranean. These are the stable suburban families that make up much of **middle Britain**.



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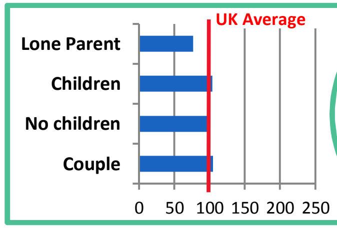


Family Type

Average Income: £39,300

Average House Price: £196,000

Household

Group L: Post-Industrial Families

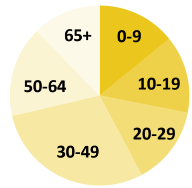
Key Catering

Key Retail

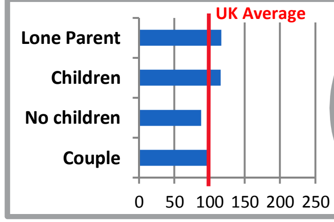
Lifestyle

In some ways these areas exemplify the **changing pattern of economic life** over the past twenty years. Once traditional blue collar areas, they are now home to **office and clerical workers** in addition to skilled workers. Most households are two parent families with **school-age children**, but there are also large numbers of **single parents**. They generally live in three-bedroom terraced houses, which tend to be at the cheaper end of the housing market. Most families are **owner-occupiers**, but a number **rent their houses from the council.**

Incomes are around the **national average**. These households have always been careful with money and have recently had to become more so. Typically these families will run only a **single car**, probably bought **second-hand**. Cable and satellite TV is popular, as are computer games and sports such as football and rugby.



Age



Family Type

Average Income:
£35,400

Average House Price:
£164,000

Household

2. 2012 Stevenage

2.3 Expenditure, Leakage & Ranking

Category Expenditure Table

Above average expenditure on Comparisons Goods and Catering compared to the UK average

Category	Expenditure per Annum (£m)	Annual Household Spend (£)	Household Spend Index v UK	East of England
Residential Spend				
Clothing & Footwear	£54.8	£1,291	101	104
House & Home	£9.3	£218	113	103
Leisure Goods	£41.6	£979	112	107
Personal Goods	£11.1	£260	99	106
Personal Care	£25.6	£602	107	104
Durable Goods	£71.5	£1,681	118	105
Comparison Goods	**£213.9**	**£5,034**	**110**	**105**
Convenience	£183.9	£4,329	99	101
Catering	£60.1	£1,415	105	102
Total Retail Spend	**£457.9**	**£10,780**	**105**	**103**
Tourist Spend	**£3.0**	**N/A**		
Worker Spend	**£3.5**			

- The adjacent table shows the Stevenage spend potential split by product category. When spend on Convenience and Catering are added to the Comparison Goods market potential Stevenage has an overall Retail spend potential of £457.9 million.
- In addition to this residential spend there is a further £3.0 million of tourist spend and £3.5 million worker spend.
- Household spend is above the national and regional averages across the vast majority of product categories. The average household in the Stevenage catchment spends £5,034 per annum of Comparison Goods, this is 10% above the UK average and 5% above the regional average.
- Spend is particularly high on Durable Goods (18% above the UK average) and House & Home (13% above the average)

Leakage Table

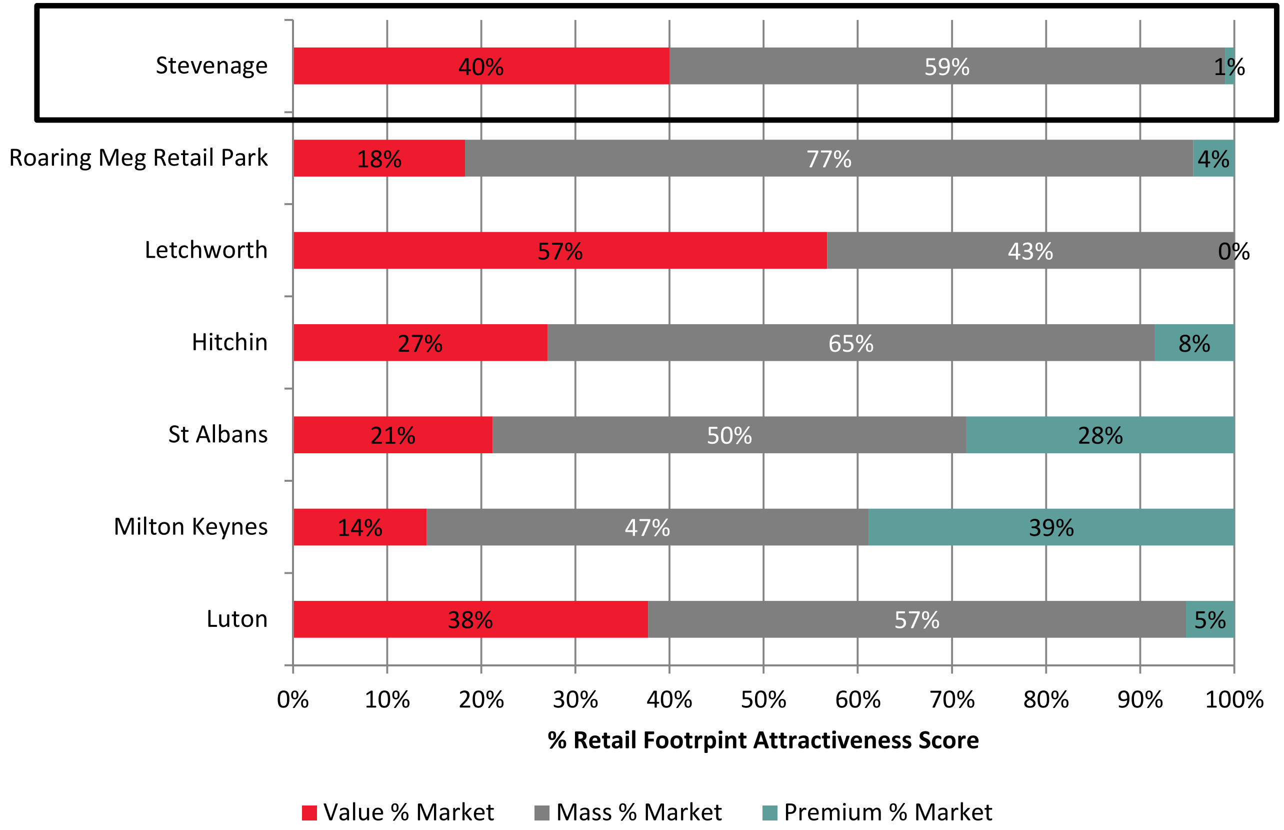
Stevenage has a strong market share in the core catchment demonstrating the local draw of the centre

Retail Footprint Centre	Retail Footprint Class	RF Score	Market Share (Core)	Market Share (Total)
Stevenage	**Mall-Dominated Town Centres**	**741**	**27.9%**	**7.8%**
Luton	Lower Average Centres	881	1.9%	7.4%
St Albans	Premium Centres	874	1.6%	5.2%
Milton Keynes	Town Centre Malls	1,350	1.0%	5.0%
West End	International Centres	6,758	6.2%	4.6%
Cambridge	Quality Regional Centres	1,548	1.8%	4.4%
Bishop's Stortford	Value Metropolitan Towns	542	0.4%	2.9%
Welwyn Garden City	Quality Metropolitan Towns	608	3.8%	2.9%
Hitchin	Value Metropolitan Towns	480	9.7%	2.8%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	2.6%	2.8%
Harlow	Mall-Dominated Town Centres	689	0.7%	2.6%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	9.1%	2.5%
Brent Cross	London Regional Malls	937	1.1%	2.5%
Dunstable	Value Metropolitan Towns	350	0.0%	2.4%
Covent Garden	Larger London Non-Residential Centres	1,493	3.8%	2.1%
Luton - Hatters Way Retail Park	Large Bulky Goods Retail Parks	162	0.1%	2.0%
Westfield Stratford City	London Regional Malls	1,428	1.9%	1.9%
Bedford	Lower Average Centres	770	0.3%	1.7%
Letchworth	Value Metropolitan Towns	274	6.8%	1.6%
Hemel Hempstead	Lower Average Centres	816	0.1%	1.5%

- The adjacent table shows the leakage from the Stevenage catchment. Stevenage captures a 7.8% market share of its total catchment meaning that 92.2% of expenditure goes to other centres.
- The main competitors across the total catchment are Luton (7.4% market share), St Albans (5.2% market share) and Milton Keynes (5.0% market share).
- The main competitors to Stevenage's core catchment (where 75% of trade is expected to originate) are Hitchin (9.7% market share of the core catchment), Roaring Meg (9.1%) and Letchworth (6.8%). Later survey analysis will show that Stevenage has a very local catchment, countering the threat of these local competitors is important.

Market Position of Competing Centres

Show market potential of main competing centres – are they more Premium



- The adjacent table shows the market position of the major competing centres. The main competitors across the entire catchment, St Albans, Milton Keynes and Luton, are all more Mass market and Premium dominated than Stevenage. The retail offer of these centres is likely to be more appealing to the affluent consumers living in Stevenage's secondary and tertiary catchment areas. The town is currently struggling to attract regular shoppers from these areas. This is likely to be a function of the Value and Mass focus of retail in Stevenage. They are choosing to shop elsewhere where the retail mix matches their shopping needs.

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2012 National Ranking

Stevenage ranks in the top 3 % of all Retail Footprint Centres in Great Britain

National Rank	Centre Name	Class	RF Score	Residential Comparison Goods Market Potential (£m)
90	Wakefield	Average Regional Centres	1,010	£224.8
91	Islington	Premium London Centres	693	£223.4
92	Bolton	Medium Conurbation Towns	971	£222.5
93	Kensington	Premium London Centres	821	£219.4
94	Basildon	Mall-Dominated Town Centres	893	£218.0
95	Batley - Birstall Shopping Park	Shopping Parks	525	£217.0
96	Broadstairs - Westwood Cross	Major Shopping Parks	683	£215.0
97	York - McArthurGlen Outlet Centre	Major FOCs Premium Dominated	589	£214.3
98	**Stevenage**	**Mall-Dominated Town Centres**	**741**	**£213.9**
99	Hereford	Average Centres	841	£213.7
100	Luton	Lower Average Centres	881	£213.4
101	Swindon - McArthurGlen Outlet Centre	Major FOCs Premium Brands	506	£213.4
102	Sunderland	Average Centres	994	£211.8
103	Braintree Designer Outlet Centre	Major FOCs Premium Brands	417	£210.2
104	Uxbridge	London Conurbation Towns	935	£209.6

- Stevenage ranks 98th out of over 4,700 Retail Footprint centres across the country when ranked by residential Comparison Goods market potential. This places Stevenage in the top 3% of all centres.
- Stevenage ranks alongside centres such as Basildon, Hereford and Luton.

2012 Regional Ranking

Stevenage ranks 11th out of 365 Retail Footprint centres in the East of England

Regional Rank	Centre Name	Class	RF Score	Residential Comparison Goods Market Potential (£m)
1	Norwich	Principal Centres	2,154	£810.0
2	Thurrock Lakeside	Outer London Regional Malls	1,138	£512.9
3	Cambridge	Quality Regional Centres	1,548	£460.2
4	Watford	Quality London Conurbation Towns	1,237	£412.5
5	Ipswich	Average Regional Centres	1,098	£392.4
6	Colchester	Quality Centres	1,036	£347.3
7	Peterborough	Quality Regional Centres	1,210	£338.8
8	Chelmsford	Quality Centres	1,033	£278.7
9	Bury St Edmunds	Quality Centres	880	£241.0
10	Basildon	Mall-Dominated Town Centres	893	£218.0
11	**Stevenage**	**Mall-Dominated Town Centres**	**741**	**£213.9**
12	Luton	Lower Average Centres	881	£213.4
13	Braintree Designer Outlet Centre	Major FOCs Premium Brands	417	£210.2
14	Bedford	Lower Average Centres	770	£202.8
15	Southend-on-Sea	Lower Average Centres	882	£198.7

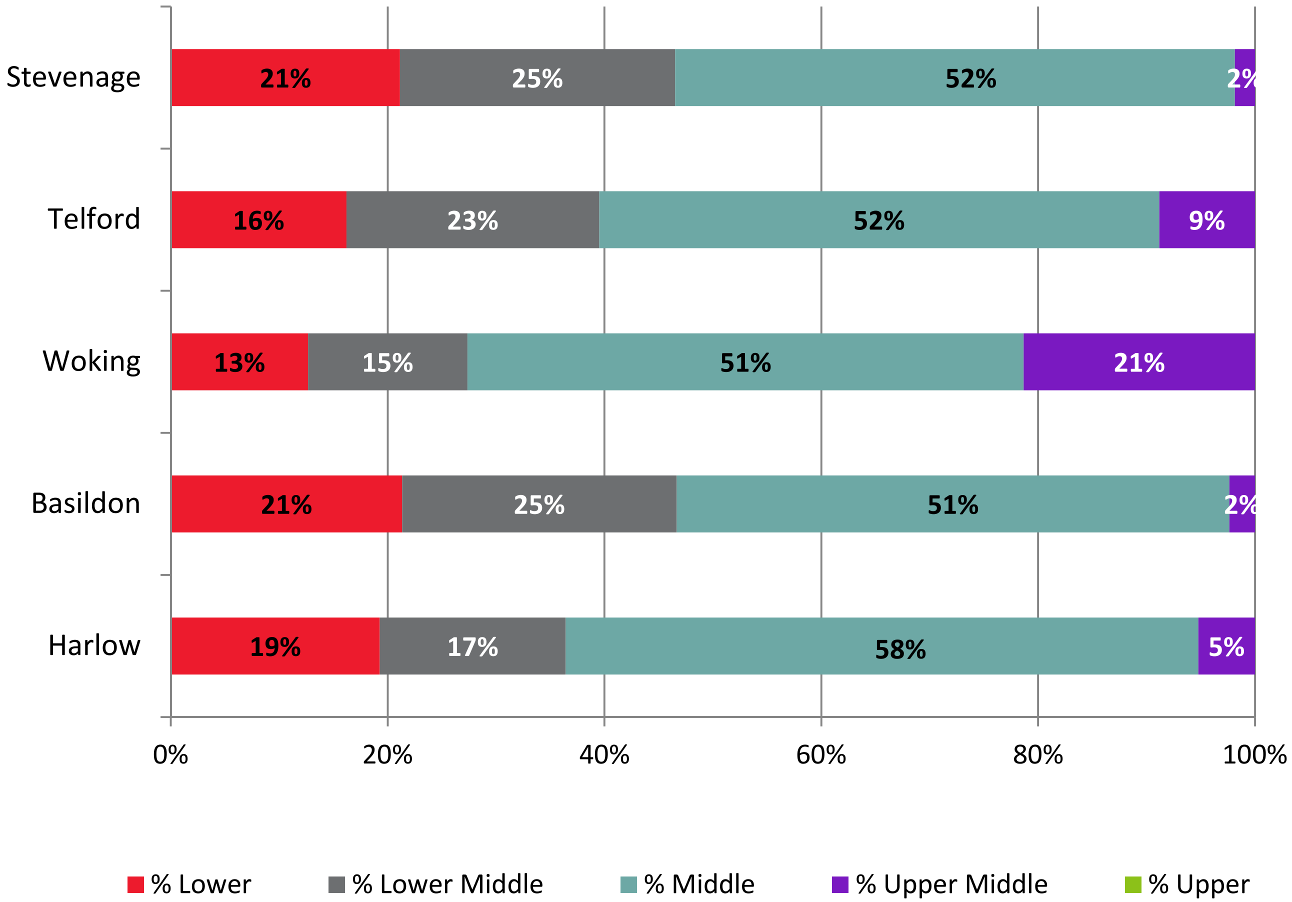
- Stevenage ranks 11th out of 365 centres in the East of England. Norwich is the top ranking centre in the region followed by Lakeside and Cambridge. Watford ranks 4th in the region with a Comparison Goods market potential of £412.5 million, almost double that of Stevenage. The centre is classed as a Quality London Conurbation Town, centres in this class have strong Premium retailer representation.
- With a Comparison Goods market potential of £213.9 million, Stevenage ranks alongside Bury St Edmonds, Basildon and Luton.

3. Benchmarking

3.1 Current Benchmarks

Benchmark Centres – Fashion Market Positioning

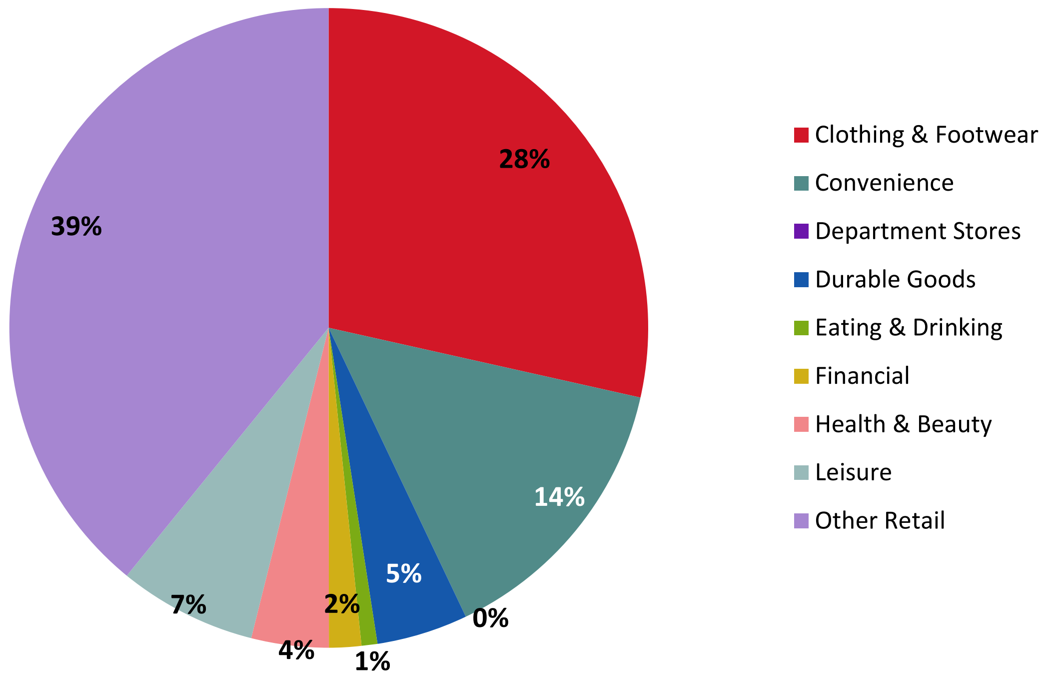
Stevenage and Basildon have the greatest proportion of lower fashion retail



- All fashion brands are split into five different categories ranging from Lower to Upper. Stevenage's fashion market position is very much Middle and Lower market focused.
- Just 2% of fashion brands in the centre are Upper Middle and there is no Upper representation whatsoever, but this is also the case for benchmark centres.
- The Upper Middle representation is the joint lowest of all benchmark centres.

Stevenage Retail Mix

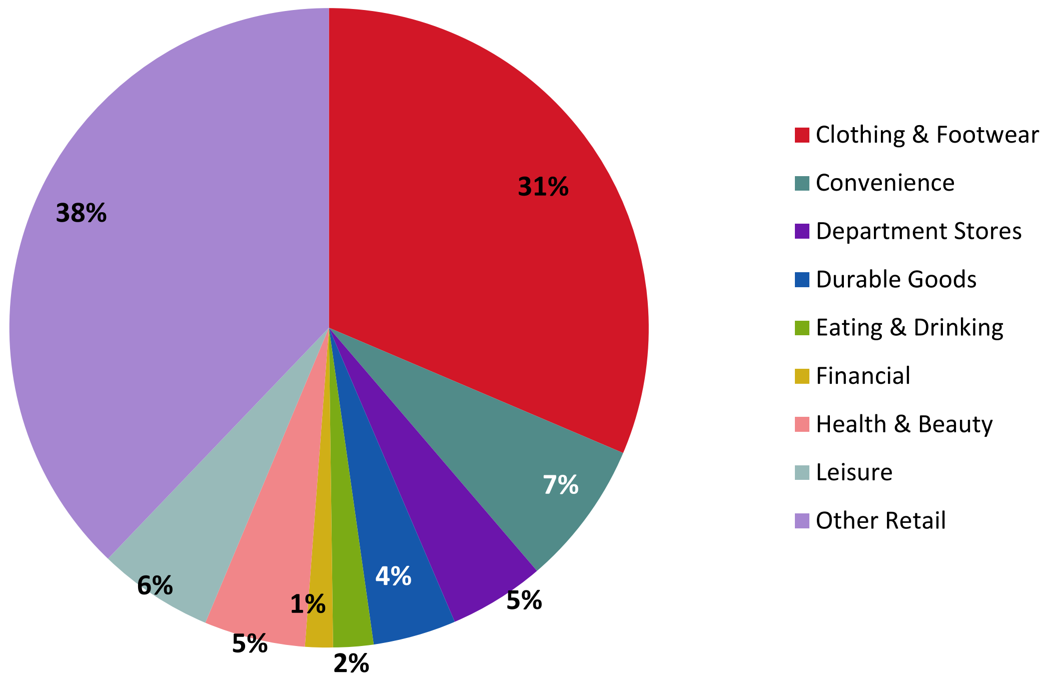
Clothing & Footwear, Convenience and Other Retail represent the majority of retail units in Stevenage



- Clothing & Footwear and Convenience retailers dominate Stevenage town centre making up 28% and 14% of retailers respectively.
- Other Retail represents 39% of retail units in Stevenage. This includes charity shops, jewellers, phone shops, electrical stores, travel agents and book stores.

Benchmark Centres Retail Mix

In the benchmark centres 31% of retailers are Clothing & Footwear



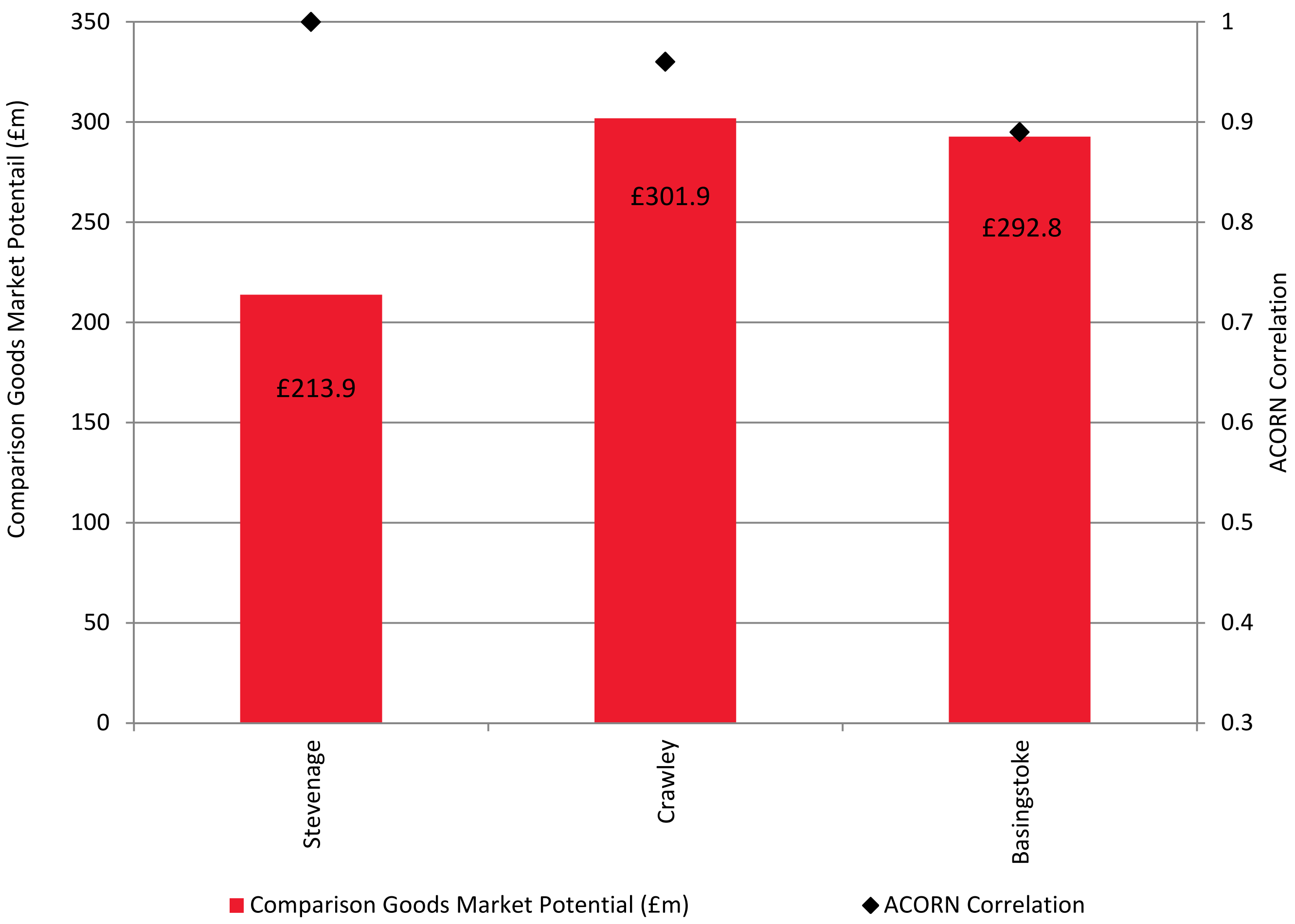
- The average retail mix of the benchmark centres (Telford, Basildon, Harlow and Woking) has been calculated.
- Compared to Stevenage there is a greater proportion of Clothing & Footwear retailers in the benchmark average.
- The benchmark centres on average only have 7% convenience compared to 14% in Stevenage town centre.

3. Benchmarking

3.2 Aspirational Benchmarks

Benchmark Centres - Aspirational

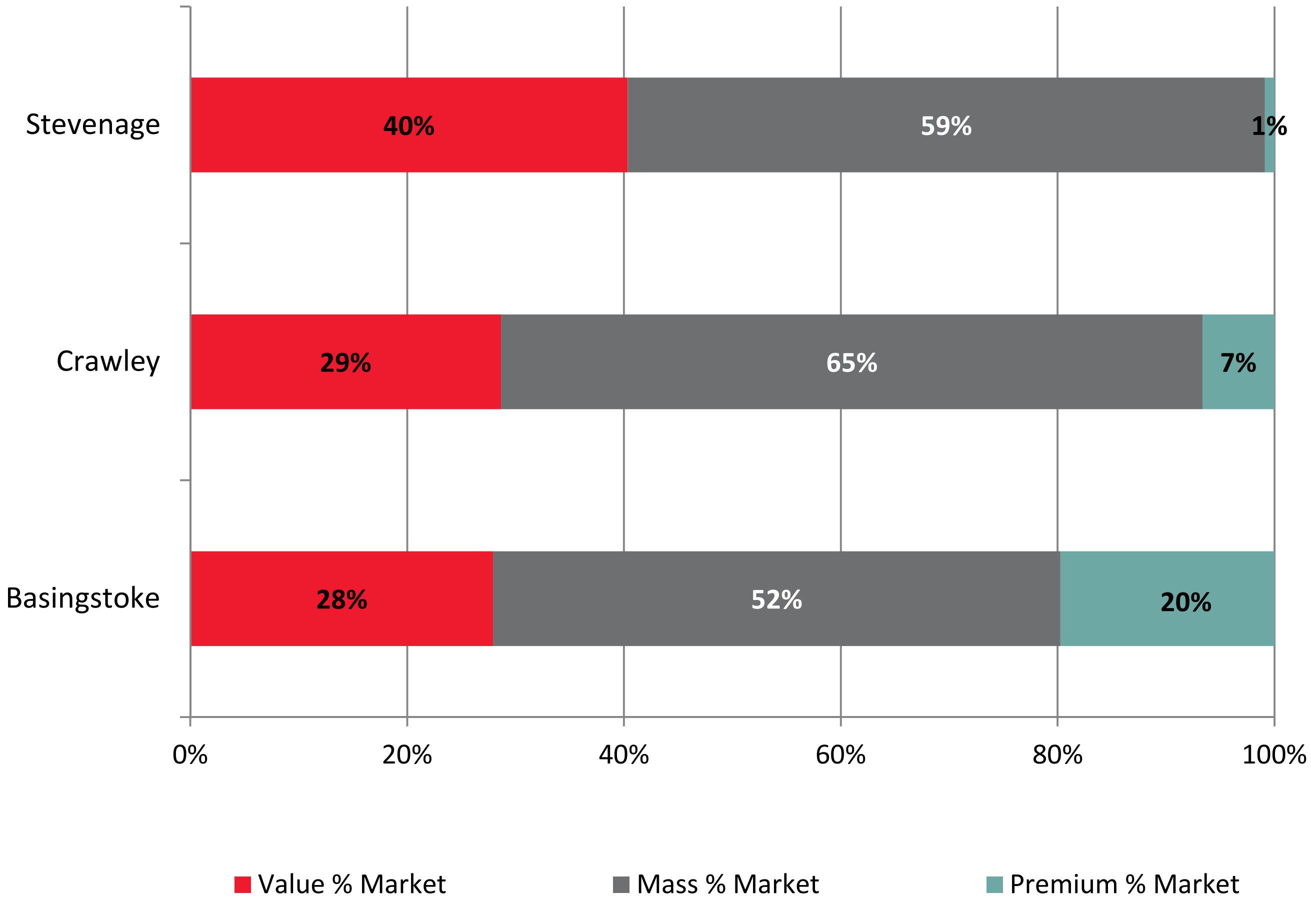
Aspiration benchmarks in the same class as Stevenage include Crawley and Basingstoke



- CACI have selected a set of aspirational benchmarks for Stevenage. These are centres in the same Retail Footprint class, with similar demographic profiles but with a bigger catchment in terms of Comparison Goods market potential.
- The aspirational benchmarks for Stevenage are Crawley and Basingstoke.
- All benchmarks have an ACORN correlation greater than 0.7 (where 1 is a perfect fit).
- These benchmark centres currently have a market potential greater than 25% benchmark usually used.
- The benchmark centres are also the same Retail Footprint minor class as Stevenage (Mall-Dominated Town Centre).

Benchmark Centres Aspirational – Market Positioning

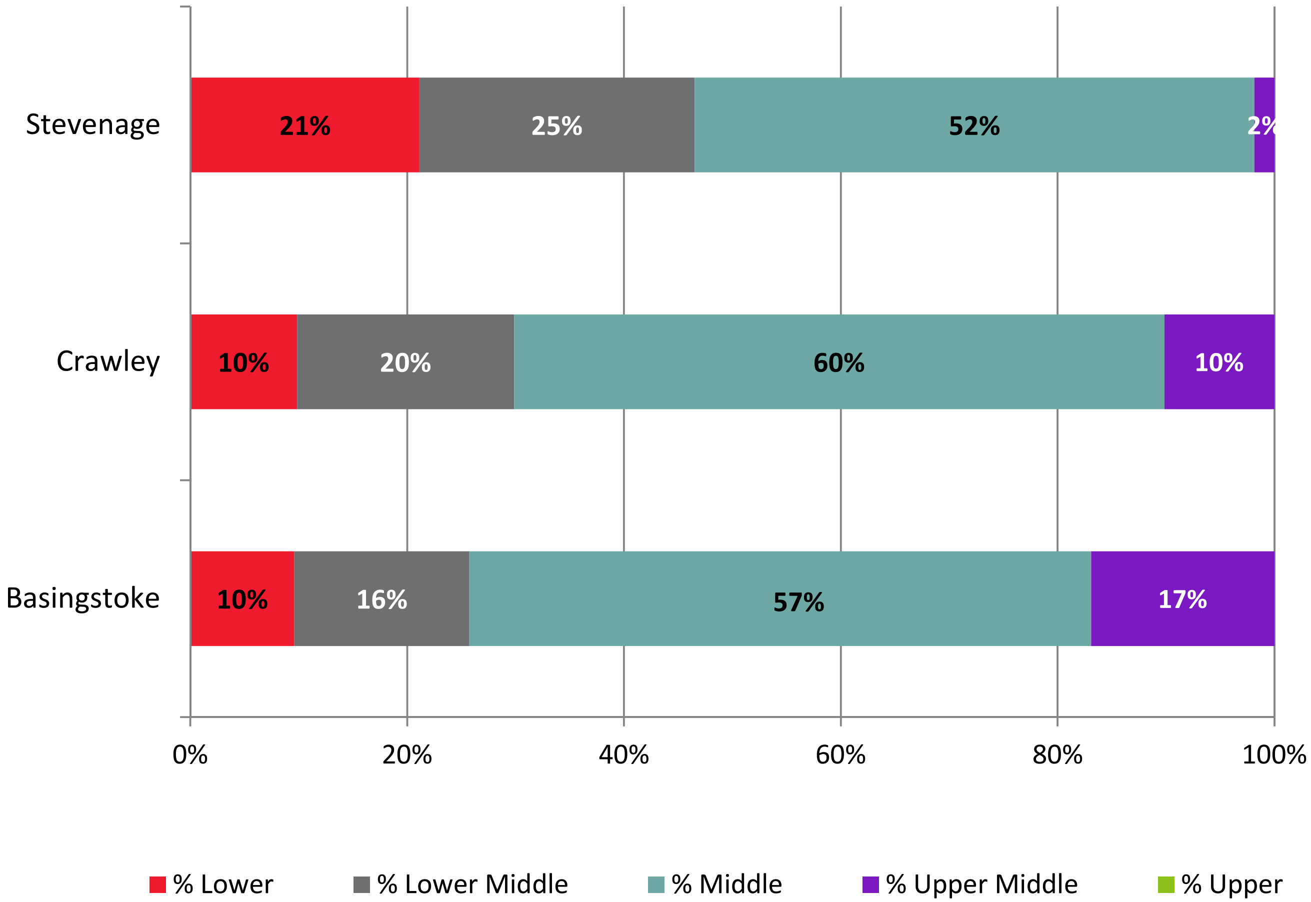
Aspirational benchmark centres have a greater proportion of Premium retail



- The aspirational benchmarks are all Mass market focussed, but unlike Stevenage, they have a strong supporting Premium retail offer. This wide ranging offer means that Crawley and Basingstoke are more attractive to shoppers within their catchment.

Benchmark Centres Aspirational – Fashion Market Positioning

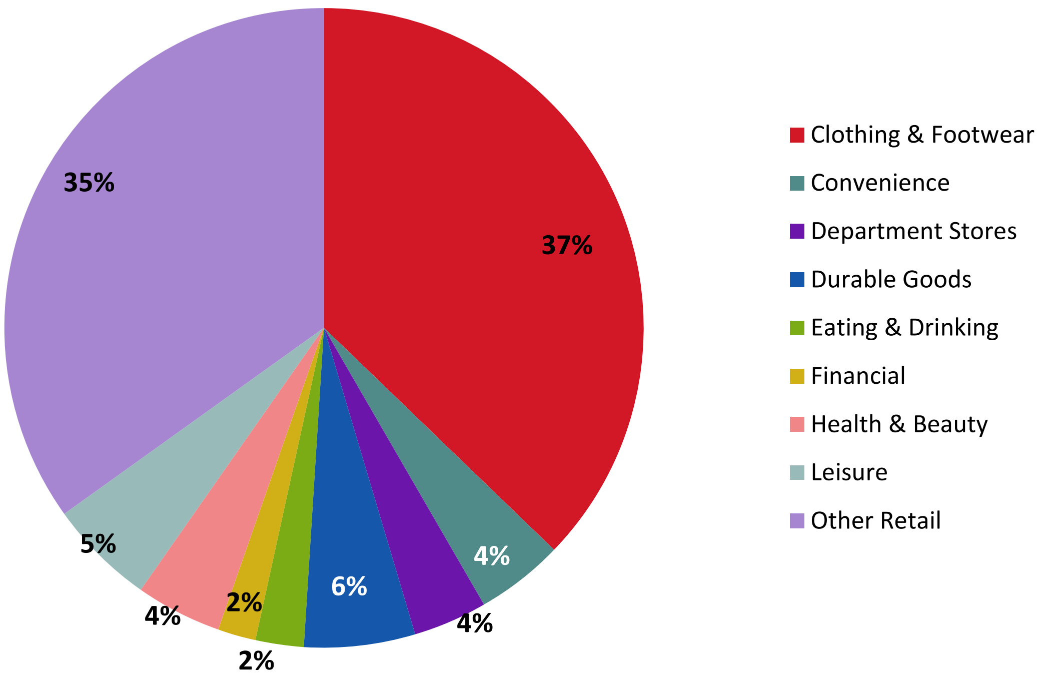
Aspirational benchmarks have a higher Upper Middle fashion retailer representation



- Crawley and Basingstoke have a higher Upper Middle fashion market position than Stevenage and conversely have less Lower and Lower Middle retailers.
- The demographics of these two catchments are similar to Stevenage therefore Stevenage could increase its Upper Middle offering.

Aspirational Benchmark Centres Retail Mix

In the aspirational benchmark centres 37% of retailers are Clothing & Footwear



- The average retail mix of the aspirational benchmark centres (Basingstoke and Crawley) has been calculated.
- Compared to Stevenage there is a greater proportion of Clothing & Footwear retailers in these aspirational benchmark centres.
- The aspirational benchmark centres on average only have 4% convenience retail compared to 14% in Stevenage town centre.

3. Benchmarking

3.3 Environmental Improvements/Public Realm

Environment

- The environment is a key aspect to attracting and retaining shoppers to a retail destination. The historical design of Stevenage town centre includes the covered provision in the form of the Westgate, with the rest of the centre typical of a post war new town development. There is a high degree of conformity in the shop frontages within Stevenage, creating a relatively uninspiring retail environment.
- The town is in need of public realm improvements to stem further stagnation and retailer inertia and ensure that the shopping environment is more aligned to that required by today's shoppers.
- Looking at the benchmarks from the previous section most have or are driving forward developments or improvements to the existing shopping areas. These include:
  - Telford – Southwater Square – with Phase 1 due in 2014 and to include Premier Inn, Cineworld, Zizzi, Pizza Express, Bella Italia, Nandos, Chimichanga.
  - Woking – The council have embarked on a £4m improvement of Commercial Way to compliment improvements already completed in Jubilee Square.
  - Crawley – A new entrance to County Mall and redevelopment of the Boulevard with a hotel, supermarket (Morrison's), and café/ restaurants. Phase 2 will be retail and leisure led with a planning application expected in summer of 2013.

Woking – Jubilee Square

Telford – Southwater Square

4. Gap Analysis

4.1 Retail & Catering

Gap Analysis: Retailers

H&M is located in all the benchmark centres

Retailer	Basildon	Basingstoke	Crawley	Harlow	Telford	Woking	Total
H&M	1	1	1	1	1	1	6
Monsoon	1	1	1	1	1	1	6
Debenhams	1	1	1		1	1	5
Warehouse	1	1	1		1	1	5
Republic	1	1	1		1	1	5
Superdry	1	1	1		1	1	5
Oasis		1	1		1	1	4
The Entertainer		1	1	1	1		4
Build A Bear	1	1			1		3
Phase Eight		1	1				2
Schuh		1	1				2
Deichmann Shoes		1	1				2
House of Fraser					1		1
Gap		1					1
Gap Kids		1					1

- Gap analysis has been carried out by assessing the presence of brands in benchmark centres that are not currently trading in Stevenage. The assumption being that similar sized towns with similar demographic profiles should attract similar brands.

- H&M and Monsoon are present in all benchmark centres. Debenhams, Warehouse, Republic and Superdry are present in five out of the six. It is Mass and Upper Mass market brands like this that would enhance the Stevenage offer, making the centre more appealing to the middle income affluence groups without putting the core, less affluent shoppers off visiting the centre.

Source: LDC 2012

Gap Analysis: Caterers

Nando’s is located in four of the benchmark centres

Caterer	Basildon	Basingstoke	Crawley	Harlow	Telford	Woking	Total
Nandos	1	1		1		1	4
Cafe Giardino	1	1	1		1		4
Pizza Express		1	1			1	3
Pizza Hut	1	1		1			3
Starbucks	1	1				1	3
Esquires Coffee	1			1		1	3
ASK		1	1				2
Caffe Nero		1				1	2
Zizzi		1				1	2
GBK		1					1
Café Rouge		1					1
Ed's Easy Diner		1					1
Giraffe		1					1
Wagamama		1					1

- The same exercise has been carried out for catering outlets across the benchmarks.
- Nandos, Café Giardino, Pizza Express, Pizza Hut, Starbucks and Esquires Coffee were the most prominent brands.

Source: LDC 2012

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Retail ACORN: Recommended Retailers

Retailers associated with Key ACORN Groups

	Secure Families		Post Industrial Families		Blue Collar Roots		Struggling Families
□	Argos	✓	BHS	✓	Asda/George	□	Argos
	Bella Italia		Blacks	□	B & Q	✓	Asda/George
✓	Bhs		Bon Marche		Beefeater Grill		Bon Marche
	Blacks		Brewers Fayre		Bon Marche	✓	Brighthouse
	Bon Marche		Debenhams	✓	Brighthouse	✓	Burton
□ ✓	Boots	✓	Dorothy Perkins	✓	Burger King	✓	Evans
	Brantano	✓	Ernest Jones	✓	Burton		Foot Locker
	Build-a-Bear Workshop	✓	Evans	✓	Evans		G-Star
✓	Clarks		Foot Locker		G-Star	✓	JD Sports
	Debenhams	□	Frankie & Benny's		Kookai	□	KFC
	Disney Store		Goldsmiths	✓	Lush	✓	Matalan
✓	Evans	✓	Greggs	✓	Matalan	✓	New Look
✓	Garfunkel's	✓	H Samuel	□	Pets at Home	□	Pizza Hut
	Giraffe		Harvester	♦	Pizza Express	✓	Poundland
✓	H Samuel		Hungry Horse		Shoe Express	✓	Primark
□	Harveys	✓	JD Sports	✓	Shoe Zone	✓	Savers
	Henri Lloyd		Jones	✓	Stead & Simpson		Shoe Express
	Jane Norman		Kookai		The Entertainer	✓	Shoe Zone
	Marks & Spencer		Millets		The Fragrance Shop	✓	SportsDirect.com
✓	Matalan		Moss Bros		T.G.I. Friday's	✓	Superdrug
✓	Millets		Mothercare	✓	TK Maxx	✓	The Perfume Shop
□	Nando's		Panasonic		Warehouse	✓	Wilkinsons
✓	Next	□	Pizza Hut	✓	Wilkinsons		
✓	The Body Shop	✓	Primark				
□	SCS		Robert Dyas				
□	Sony Centre		Russell & Bromley				
	Wallis		Shoe Express				
			Sony Centre				
		✓	SportsDirect.com				
			Ted Baker				
		✓	TK Maxx				

✓ **Trading in Stevenage Town Centre**

♦ **Trading in Stevenage Old Town**

□ **Trading in Retail or Leisure Park in Stevenage**

Source: Retail ACORN 2012

- CACI have identified the following ACORN Groups that represent a high proportion of survey respondents.
- The table outlines some of the key brands that are associated with these ACORN Groups and those already present in Stevenage are also identified.

CACI

4. Gap Analysis

4.2 Leisure

Stevenage Leisure Offering

Excellent hotel provision with Stevenage demonstrates a potential market to attract into the town

	C1 - Hotels	D1 - Museums	D1 - Libraries	D2 - Theatres	D2 - Cinemas
Stevenage	**7** *Novotel* *Best Western Roebuck Inn* *Premier Inn Stevenage Central* *Holiday Inn Express Stevenage* *Hotel Ibis Stevenage Centre* *Holiday Inn* *Ramada Cromwell Hotel*	**1** *Stevenage Museum*	**2** *Stevenage Old Town Library* *Stevenage Library*	**2** *The Lytton Theatre* *The Gordon Craig Theatre*	**1** *Cineworld Stevenage (16 screens)*

- The above table demonstrates the current leisure offering in Stevenage.
- Stevenage currently has a good provision of well known branded hotels. This demonstrates there is a great potential to encourage these hotel guests into both Stevenage town centre and perhaps more importantly Stevenage Old Town where there are many restaurants and bars that would appeal to the clientele. This could be achieved through improving the awareness of guests and highlighting the leisure options within Stevenage.
- Stevenage also has excellent cinema provision with 16 screens at the Cineworld on the edge of the town centre.
- The town is lacking a leisure destination that will draw people from longer distances to the centre.

Source: LDC 2012 (Please note only branded hotels have been picked up by LDC data)

CACI

Leisure Offering: Current Benchmarks

Compared to the benchmarks Stevenage has the best hotel and cinema screen provision

	C1 - Hotels	D1 - Museums	D1 - Libraries	D2 - Theatres	D2 - Cinemas
Basildon	6		4	1	1 (Empire 12 screens)
Harlow	2	1	4	2	1 Cineworld (6 screens)
Telford	5		8	1	1 (ODEON 10 screens)
Woking	3		2	2	1 (Ambassador Cinema 6 screens)
Stevenage	7	1	2	2	1 (Cineworld 16 screens)

- The leisure offering within Stevenage has been compared to the current benchmark centres.
- Stevenage has the best hotel and cinema screen provision compared to the benchmarks.
- Telford has the greatest library provision.
- Harlow, Woking and Stevenage all have two theatres each.

Source: LDC 2012

Leisure Offering: Aspirational Benchmarks

Basingstoke has a unique leisure attraction that will attract visitors from across the south

	C1 - Hotels	D1 - Museums	D1 - Libraries	D2 - Theatres	D2 - Cinemas
Basingstoke	5	3	3	1	2 (ODEON 10 screens & Vue 10 screens)
Crawley	5	1	2	1	1 (Cineworld 15 screens)
Stevenage	7	1	2	2	1 (Cineworld 16 screens)

- Stevenage leisure offering has been compared to the aspirational benchmark centres.
- Basingstoke has the most museums compared to Crawley and Stevenage. One of these is the Milestones museum, which is one of the most popular tourist destinations in the south of England. This is a key draw for the town and its unique offering will attract visitors all year round.
- As Crawley is located close to Gatwick airport, the town may benefit from people staying at the numerous hotels and using the local restaurants or bars.
- Stevenage has a cinema provision inline with the aspirational benchmarks.

Source: LDC 2012

4. Gap Analysis

4.3 Recommendations

Recommendations

Retail

- Whilst there have been proposals outlined to develop the Westgate centre, it is clear that in order for Stevenage to remain competitive and stem the leakage from its catchment there is still a need for appropriate retail stock for todays tenants. This could be implemented through investment in the refurbishment and reconfiguration of the existing building stock.
- CACI would recommend substituting some of the value retail offering within the town for mass market retailers that are more attractive for target shoppers.

Catering

- CACI would recommend that Stevenage improve the café offering within the town. It would be difficult for the town to establish itself as a restaurant dining quarter given the competition from both Stevenage Old Town and the family focused offering at the Leisure Park.
- The café culture would appeal to those currently visiting Stevenage and help to increase dwell time of shoppers. These cafes should be well recognised quality brands that would have a wide appeal.
- CACI would not recommend increasing the fast food offering within the town.

Leisure

- The pitch of The Plaza development is not central enough for retailing and previous catering/leisure outlets have proved unsuccessful, with the exception of Wetherspoons. Across the UK there has been a decline in the number of pubs, as they become less fashionable to the younger generation and face more competition from cheap alcohol available at supermarkets. CACI would not recommend nightclub use as over recent years a number of nightclub operators have gone out of business (largely due to reduced costs in alcohol purchased from supermarkets, and relaxations in licencing hours) as the “going out” demographic tend to frequent pubs and bars rather than nightclubs.
- The high vacancy rate of The Plaza is currently the worst outcome for Stevenage town centre. CACI would recommend that Stevenage Borough Council look to research residential, office and potential bar operators to establish if any of these can utilise the space in its current form or through reconfiguration. If this research proves unsuccessful it would be suggested the building is knocked down and turned into public realm, this will help to improve the overall perception of the town by removing the unsightly vacant units.

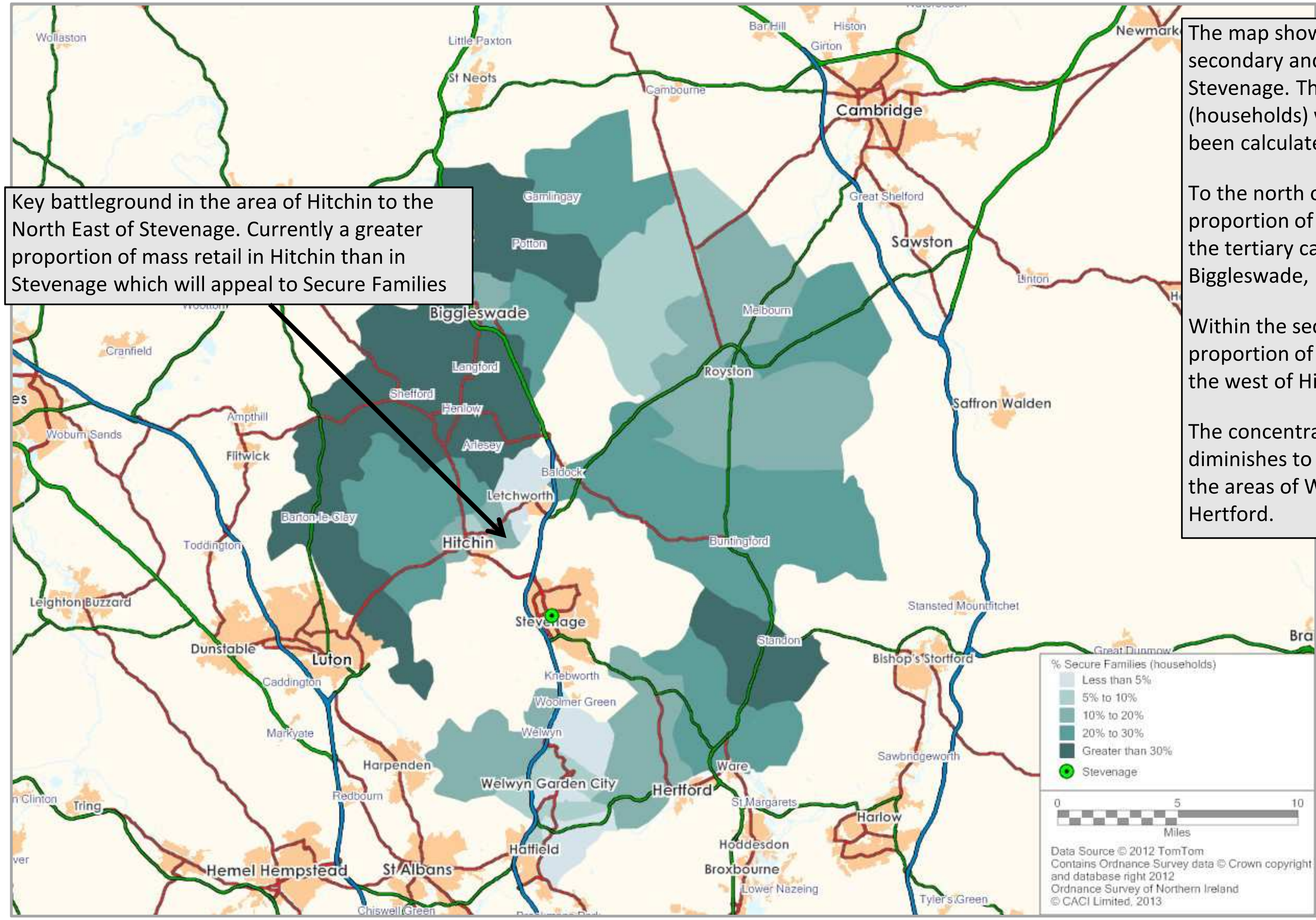
6. Battleground Analysis

5.1 Secure Families

Secondary & Tertiary Catchments: % Secure Families

Greatest concentrations of Secure Families found to the north of Stevenage in and around Biggleswade

Key battleground in the area of Hitchin to the North East of Stevenage. Currently a greater proportion of mass retail in Hitchin than in Stevenage which will appeal to Secure Families



The map shows the Postal Sectors within the secondary and tertiary catchment for Stevenage. The proportion of Secure Families (households) within these Postal Sectors has been calculated.

To the north of Stevenage the greatest proportion of Secure Families are found in the tertiary catchment in the areas of Biggleswade, Langford and Clifton.

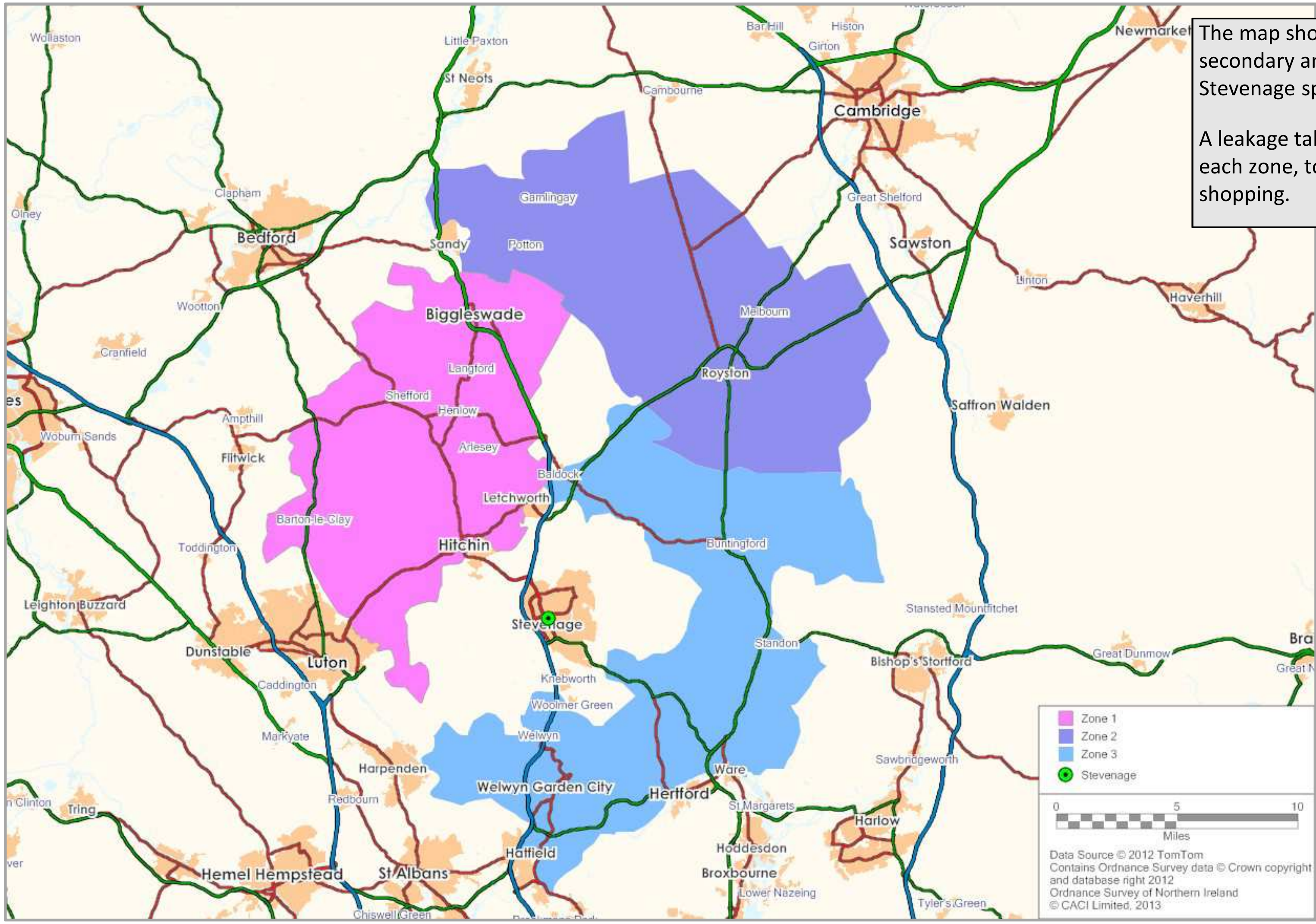
Within the secondary catchment a high proportion of Secure Families are found to the west of Hitchin.

The concentration of Secure Families diminishes to the south of the catchment, in the areas of Welwyn Garden City and Hertford.

CACI

Secondary & Tertiary Catchments: Zones

Secondary & Tertiary catchment has been split into three zones



The map shows the Postal Sectors within the secondary and tertiary catchment for Stevenage split into three distinct zones.

A leakage table has then been created for each zone, to demonstrate where people are shopping.

Leakage: Zone 1

Stevenage has a 6.8% total market share

Retail Footprint Centre	Retail Footprint Class	RF Score	Market Share (Total)
London - West End	International Centres	6,758	39.6%
London - Covent Garden	Larger London Non-Residential Centres	1,493	16.5%
Stevenage	**Mall-Dominated Town Centres**	**741**	**6.8%**
Milton Keynes	Town Centre Malls	1,350	6.3%
Westfield Stratford City	London Regional Malls	1,428	6.2%
Hitchin	Value Metropolitan Towns	480	5.2%
Luton	Lower Average Centres	881	3.1%
London - Knightsbridge	Larger London Non-Residential Centres	1511	2.7%
Letchworth	Value Metropolitan Towns	274	1.6%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	1.2%
London - Kings Cross	Premium London Non-Residential Centres	278	1.2%
Bedford	Lower Average Centres	770	0.9%
St Albans	Premium Centres	874	0.8%
City of London - Broadgate	Quality London Non-Residential Centres	794	0.8%
Biggleswade - Biggleswade Retail Park	Large Bulky Goods Retail Parks	102	0.8%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	0.7%

Source: Retail Footprint 2012

- The adjacent table shows where people are shopping in zone 1.
- Within this zone Stevenage achieves a 6.8% market share. It's main competitors are the West End and Covent Garden.

Leakage: Zone 2

Stevenage has a 11.1% total market share

Retail Footprint Centre	Retail Footprint Class	RF Score	Market Share (Total)
Cambridge	Quality Regional Centres	1,548	45.9%
Stevenage	**Mall-Dominated Town Centres**	**741**	**11.1%**
London - Covent Garden	Larger London Non-Residential Centres	1,493	8.4%
Royston - Tesco-Extra	Supermarkets	47	7.4%
Milton Keynes	Town Centre Malls	1,350	6.9%
Cambridge - Cambridge Retail Park	Shopping Parks	462	4.2%
Bedford	Lower Average Centres	770	2.0%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	2.0%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	1.4%
Biggleswade - Biggleswade Retail Park	Large Bulky Goods Retail Parks	102	1.1%
St Albans	Premium Centres	874	1.1%
Biggleswade	Average Local Centres	178	1.0%
St Neots	Small Regional Towns	218	0.6%
Bedford - Interchange Retail Park	Shopping Parks	203	0.6%
Hitchin	Value Metropolitan Towns	480	0.6%
Royston - Hertfordshire	Average Local Centres	60	0.6%

Source: Retail Footprint 2012

- The adjacent table shows where people are shopping in zone 2.
- Within this zone Stevenage achieves a 11.1% market share. It's main competitor is Cambridge.

CACI

Leakage: Zone 3

Stevenage has a 7.1% total market share

Retail Footprint Centre	Retail Footprint Class	RF Score	Market Share (Total)
London - West End	International Centres	6,758	23.7%
London - Covent Garden	Larger London Non-Residential Centres	1,493	11.5%
Brent Cross	London Regional Malls	937	11.2%
Stevenage	**Mall-Dominated Town Centres**	**741**	**7.1%**
Welwyn Garden City	Quality Metropolitan Towns	608	6.9%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	6.0%
Westfield London	Large London Regional Malls	1,757	5.5%
St Albans	Premium Centres	874	4.9%
Westfield Stratford City	London Regional Malls	1428	4.7%
Harlow	Mall-Dominated Town Centres	689	2.0%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	1.9%
Hertford	Value Metropolitan Towns	248	1.2%
London - Knightsbridge	Larger London Non-Residential Centres	1511	1.1%
Bluewater	Premium Outer London Regional Malls	1652	0.9%
Cheshunt - Brookfield Retail Park	Shopping Parks	219	0.9%
City of London - Broadgate	Quality London Non-Residential Centres	794	0.9%

Source: Retail Footprint 2012

- The adjacent table shows where people are shopping in zone 3.
- Within this zone Stevenage achieves a 7.1% market share. It's main competitors are the West End, Covent Garden and Brent Cross.

7. Survey Analysis

7.1 Stevenage Town Centre

Introduction

- In order to understand the shopping habits and perceptions of those who both use and don't use Stevenage ,a series of survey have been conducted at various locations.
- The surveys were conducted w/c 12th November 2012.
- There were surveys conducted at:
  - Stevenage Town Centre (403 respondents)
  - Roaring Meg Retail Park (103 respondents)
  - Hitchin (86 respondents)
  - Letchworth (67 respondents)
  - Stevenage Old Town (72 respondents)

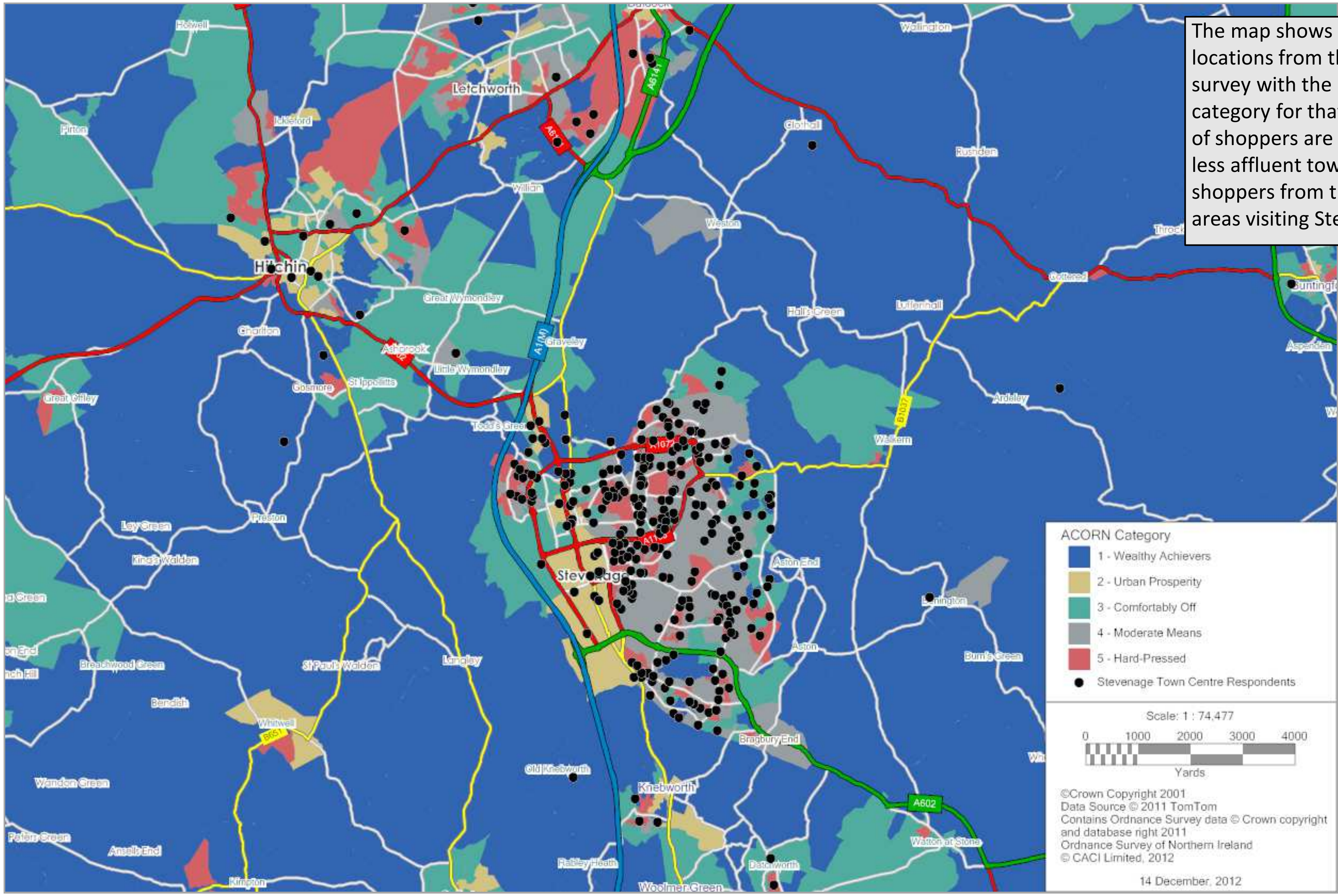
Respondent Location: Actual v Predicted

85.6% of survey respondents are visiting Stevenage from within the primary catchment

Catchment	Actual Number of Visitors	2012 Actual Visitors (%)	2012 Survey Spend (%)	Expected % From Retail Footprint
Primary	326	85.6%	77.2%	51.4%
Secondary	26	6.8%	7.2%	24.0%
Core Catchment	**352**	92.4%	84.4%	**75.4%**
Tertiary	16	4.2%	8.3%	14.5%
Quaternary	13	3.4%	7.3%	10.2%
Total Catchment	**381**	100.0%	100.0%	**100.0%**
Beyond the Catchment	14	3.7%	3.5%	

- Stevenage has a very local catchment with 85.6% of respondents originating from the primary catchment and 77.2% of surveyed spend originating from the same area.
- Very few respondents are originating from the secondary and tertiary catchment areas, 6.8% and 4.2% of respondents respectively. This represents a big opportunity for Stevenage to attract more shoppers from these areas assuming that the retail mix of the town is attractive to them.

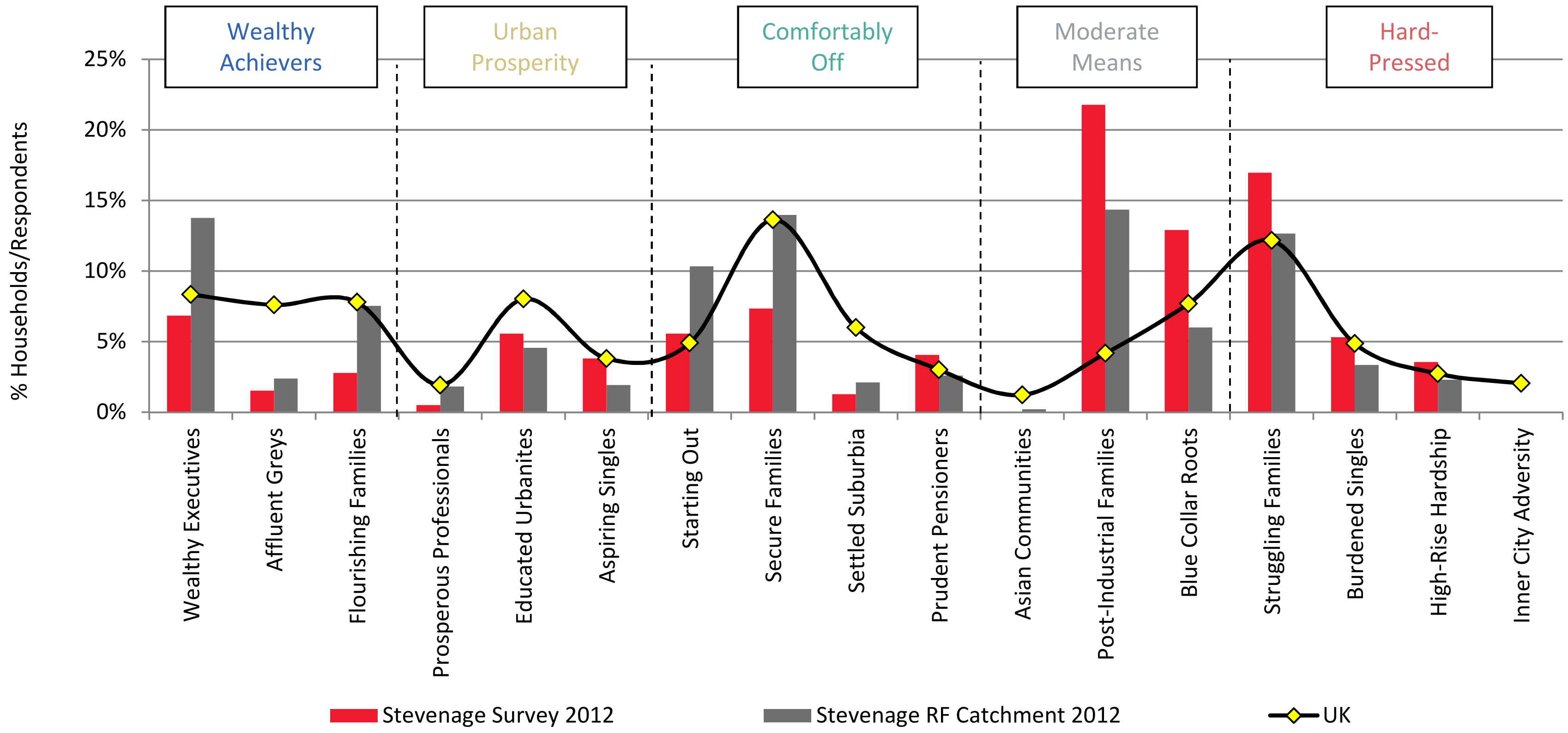
The majority of respondents originate from the less affluent areas in and around Stevenage



The map shows the respondent locations from the town centre survey with the underlying ACORN category for that area. The majority of shoppers are originating from the less affluent town centre with few shoppers from the affluent rural areas visiting Stevenage.

Stevenage Town Centre Survey ACORN Profile

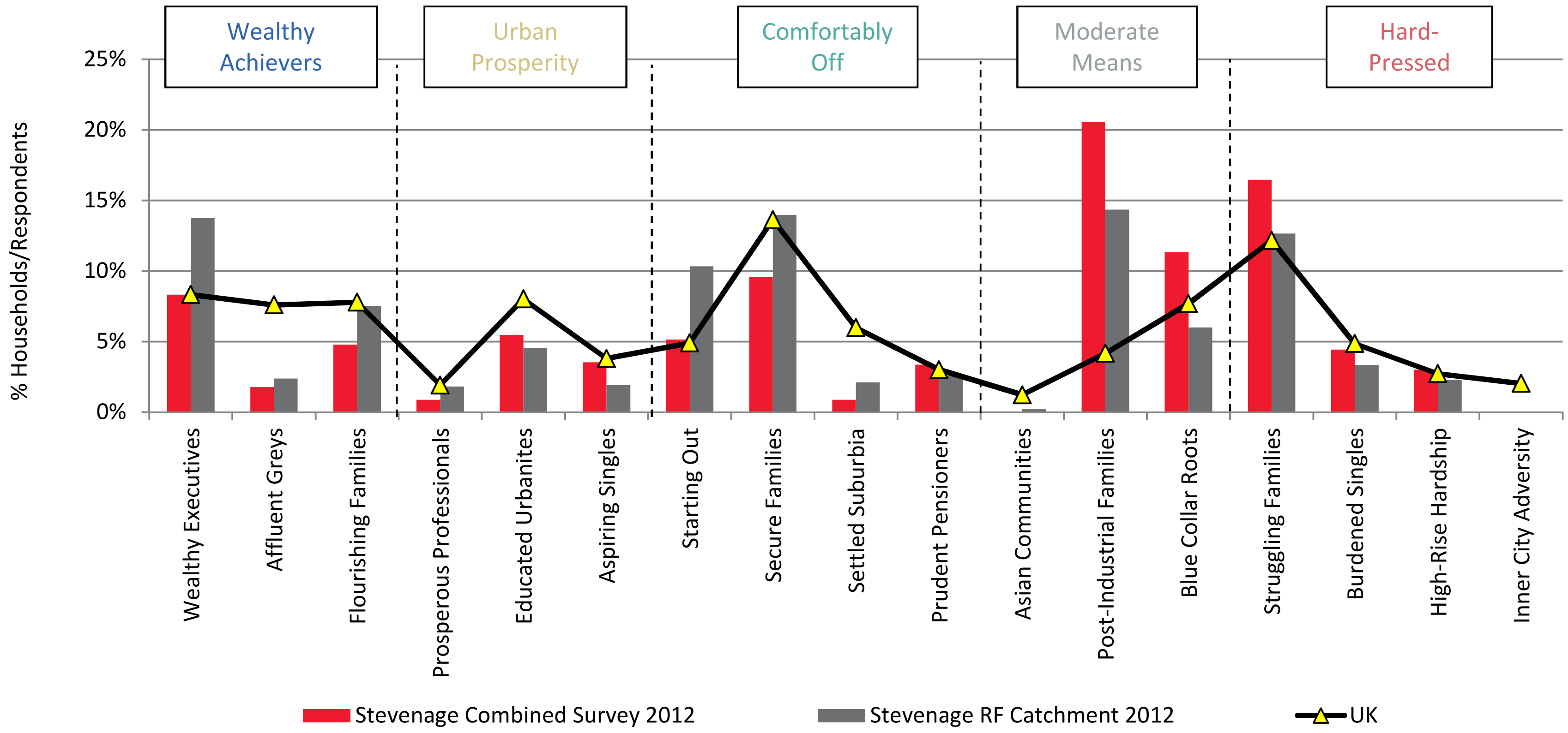
Attracting a greater proportion of Moderate Means & Hard-Pressed shoppers compared to the catchment



- Stevenage town centre is attracting a higher proportion of the less affluent groups than are present in the catchment, this reflects the retail offer within the town. 21.8% of respondents were Post-Industrial Families compared to 14.3% of households within the catchment. 12.9% of respondents were Blue Collar Roots compared to just 6.0% of the catchment. There were also over representations of the Struggling Families (17.0% of respondents versus 12.7% of the catchment).
- Conversely the centre attracted very few of the three Wealthy Achiever groups. These make up 23.7% of the catchment but account for just 11.1% of shoppers.

Combined Stevenage Survey ACORN Profile

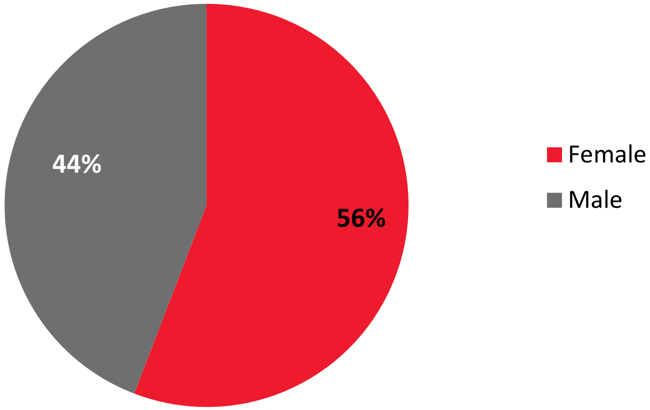
Combined profile has a greater proportion of the more affluent ACORN groups

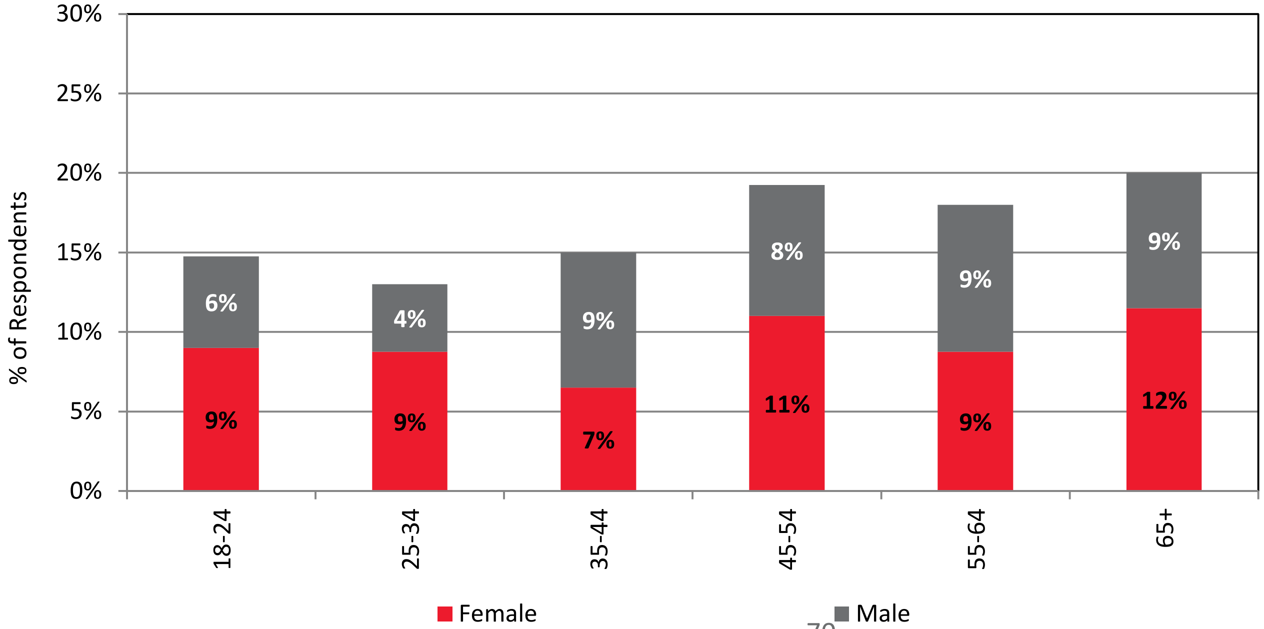


- Stevenage combined survey profile from the Stevenage Town Centre, Stevenage Old Town and Roaring Meg Retail Park surveys.
- 21% of respondents are classified as Post Industrial Families.

Age & Gender

Attracting female shoppers over the age of 45 years old

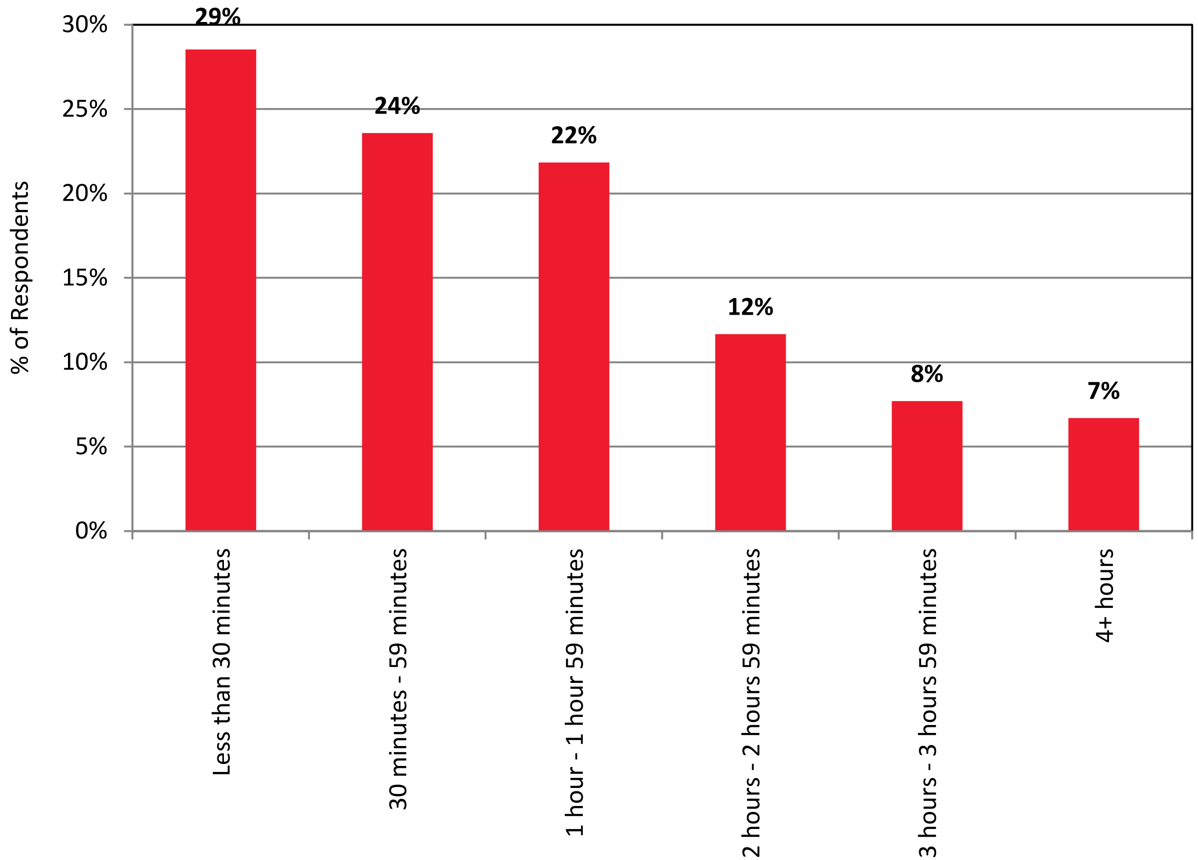




- The average age of respondents in the town centre survey was 47 years old.
- The greatest proportion of respondents were aged 65+.

Dwell Time

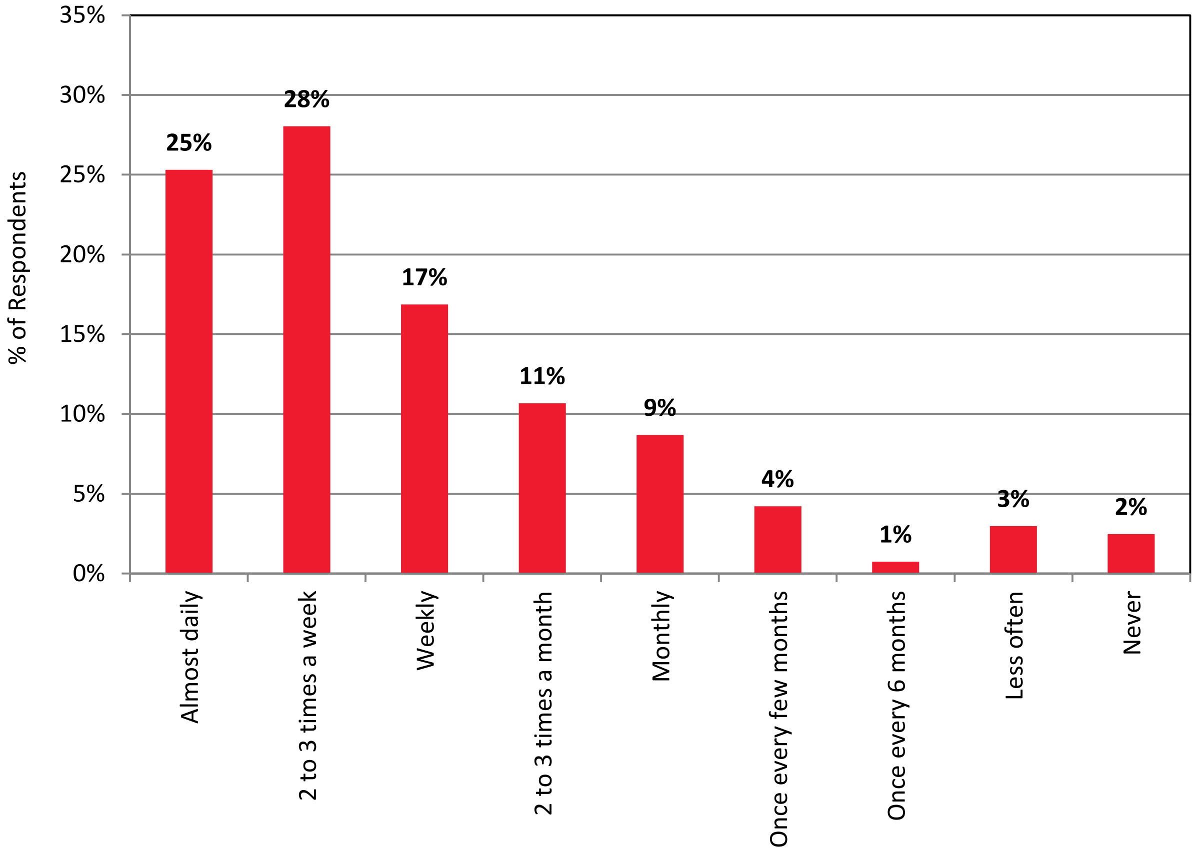
Stevenage town centre has an average dwell time of 75 minutes



- The town has an average dwell time of 75 minutes.
- The local nature of the centre is reflected in the high proportion of shoppers spending less than 30 minutes at the centre (29%). A further 24% spend between 30 minutes and an hour at the centre.
- Local centres with small catchments tend to attract visitors relatively frequently but for short periods of time. A dwell time of 75 minutes is relatively strong considering how tight the catchment is.

Frequency visit Stevenage Town Centre

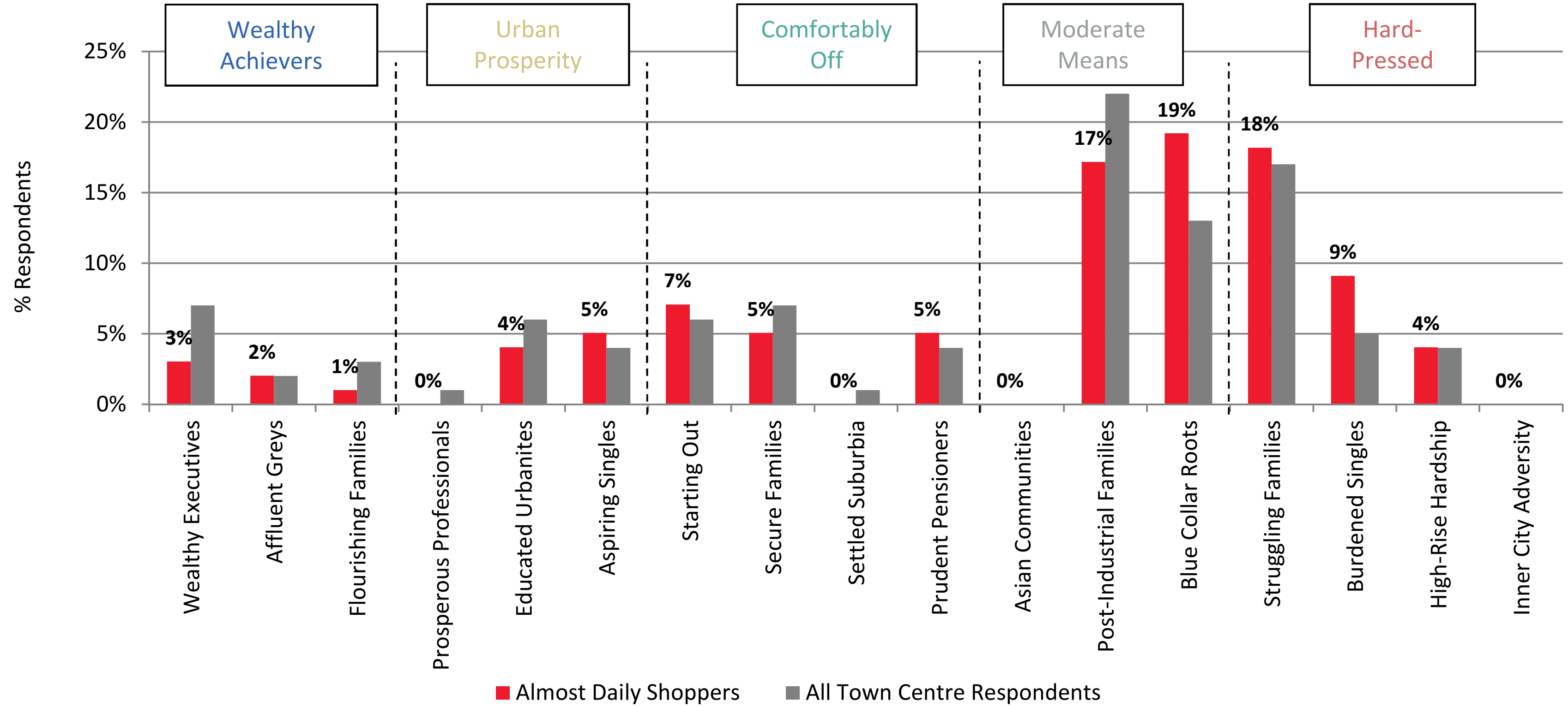
Respondents on average respondents visit Stevenage town centre 94 times a year



- On average shoppers are visiting the centre a very high 94 times a year. This is a function of the local nature of the centre.
- 25% of respondents visit the centre almost daily with a further 28% visiting 2 to 3 times a week and 17% visiting weekly. This means that 70% of shoppers in Stevenage town centre visit the centre at least weekly. This is exceptionally high.

Frequency visit Stevenage Town Centre – ‘Almost Daily’ ACORN Profile

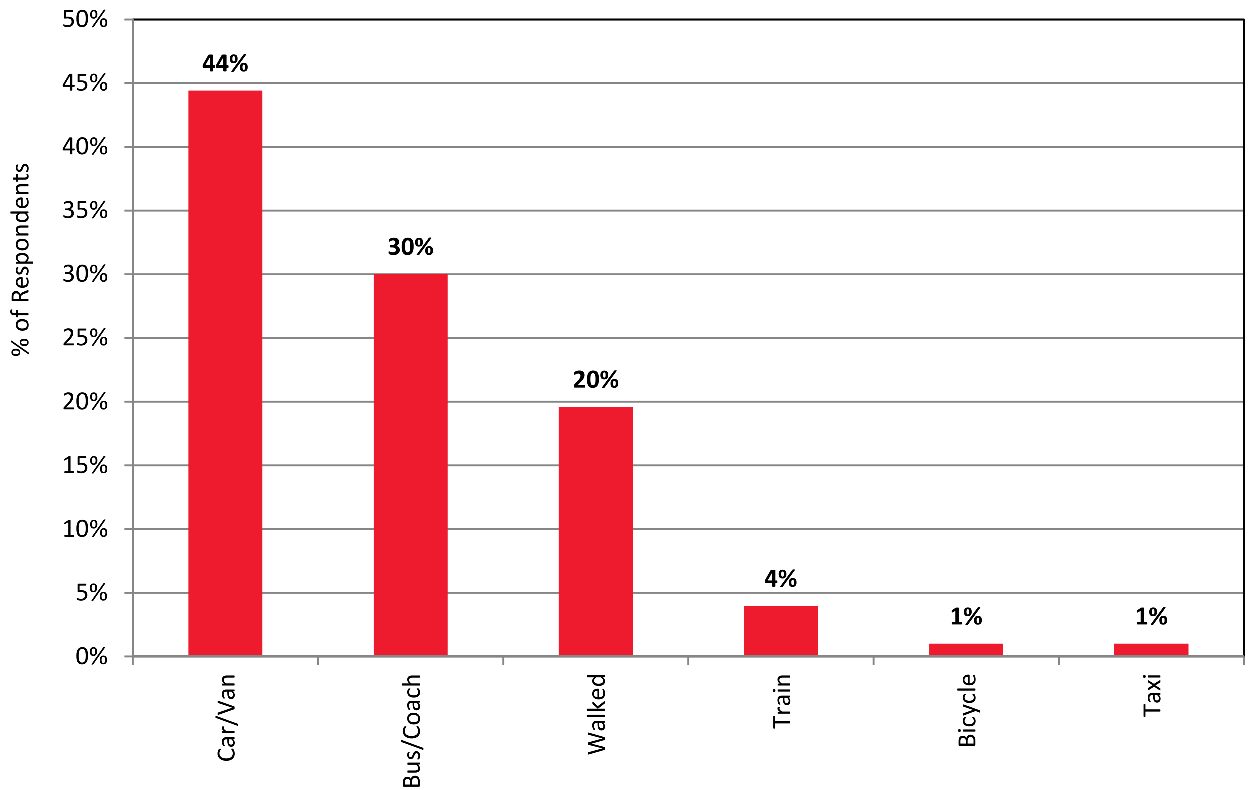
Those shopping in the town on a regular basis are more likely to fall into the less affluent groups



- Those visiting the centre on an almost daily basis were more likely to be from the less affluent groups. In combination the Blue Collar Roots, Struggling Families and Burdened Singles made up 35% of respondents but made up 46% of those visiting the centre almost daily.
- These groups are found in high concentrations in and around the town. It makes sense that those living close to the town centre will shop there the most frequently but it is also a function of the retail mix of the town. The less affluent groups will be attracted to the Value and Lower Mass market brands that are present in the centre.

Mode of Transport

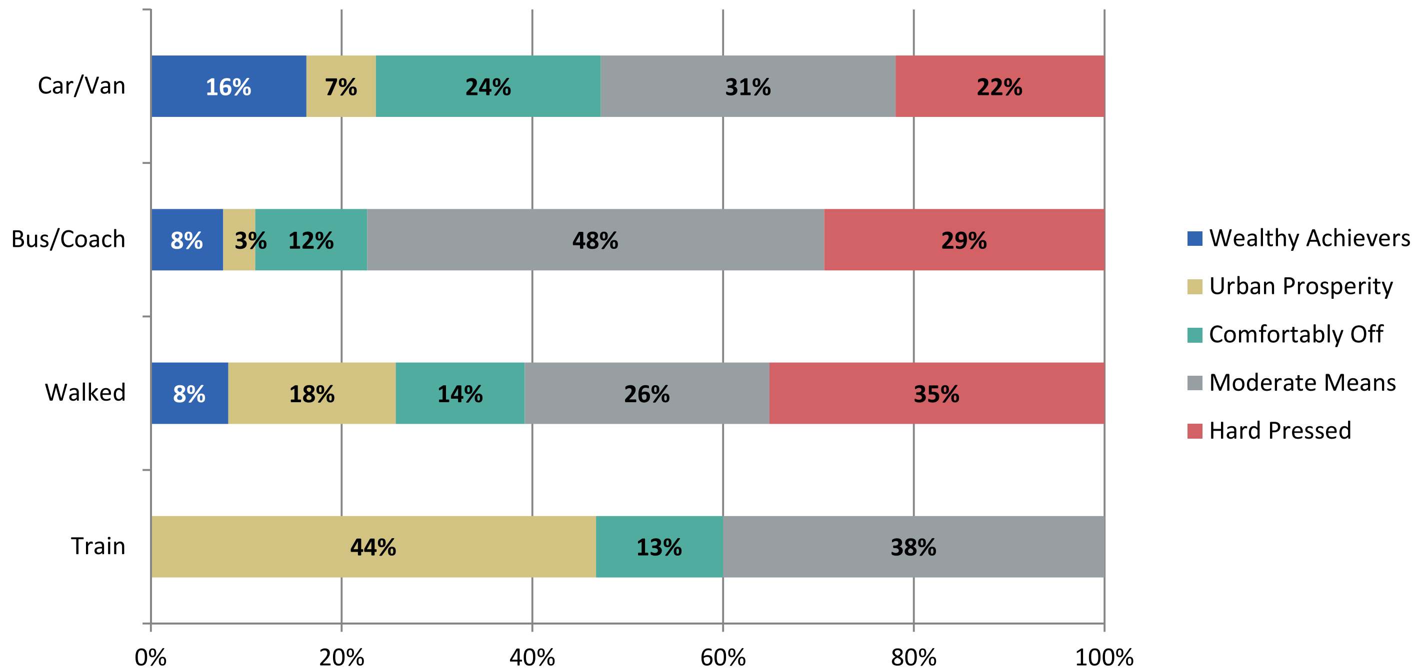
Car/van most popular mode of transport, followed by bus/coach



- The greatest proportion of respondents travelled to Stevenage town centre by car/van.
- The bus was the next most popular mode of transport. Stevenage has a bus station located in the heart of the town centre providing services across Hertfordshire.
- 20% of respondents walked to the town centre, demonstrating the local nature of the town.

Mode of Transport: ACORN Category

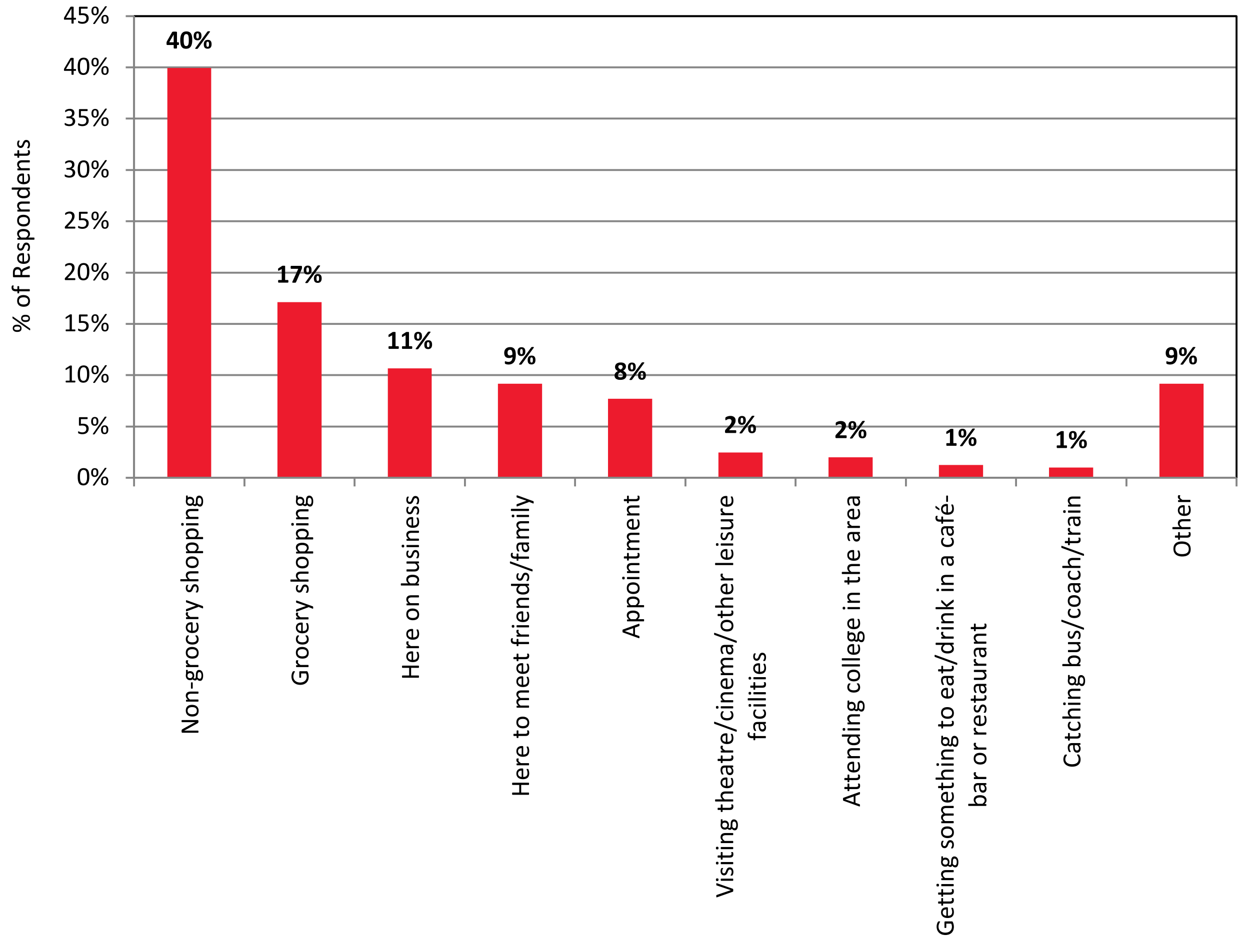
Wealthy Achievers arrived by car , Moderate Means on bus and Hard Pressed walked



- The mode of transport has been split down by ACORN category.
- The greatest proportion of Wealthy Achievers travelled by car to Stevenage town centre. This is to be expected as this ACORN category has high car ownership levels and will tend to live further from the town centre in the suburban and rural areas where public transport accessibility can be poor.
- Moderate Means had the greatest proportion of respondents travelling by bus (48%).
- 35% of Hard Pressed respondents walked to the town centre. These less affluent shoppers have lower car ownership levels and live in close proximity to the town.

Reason for Visiting Stevenage Town Centre

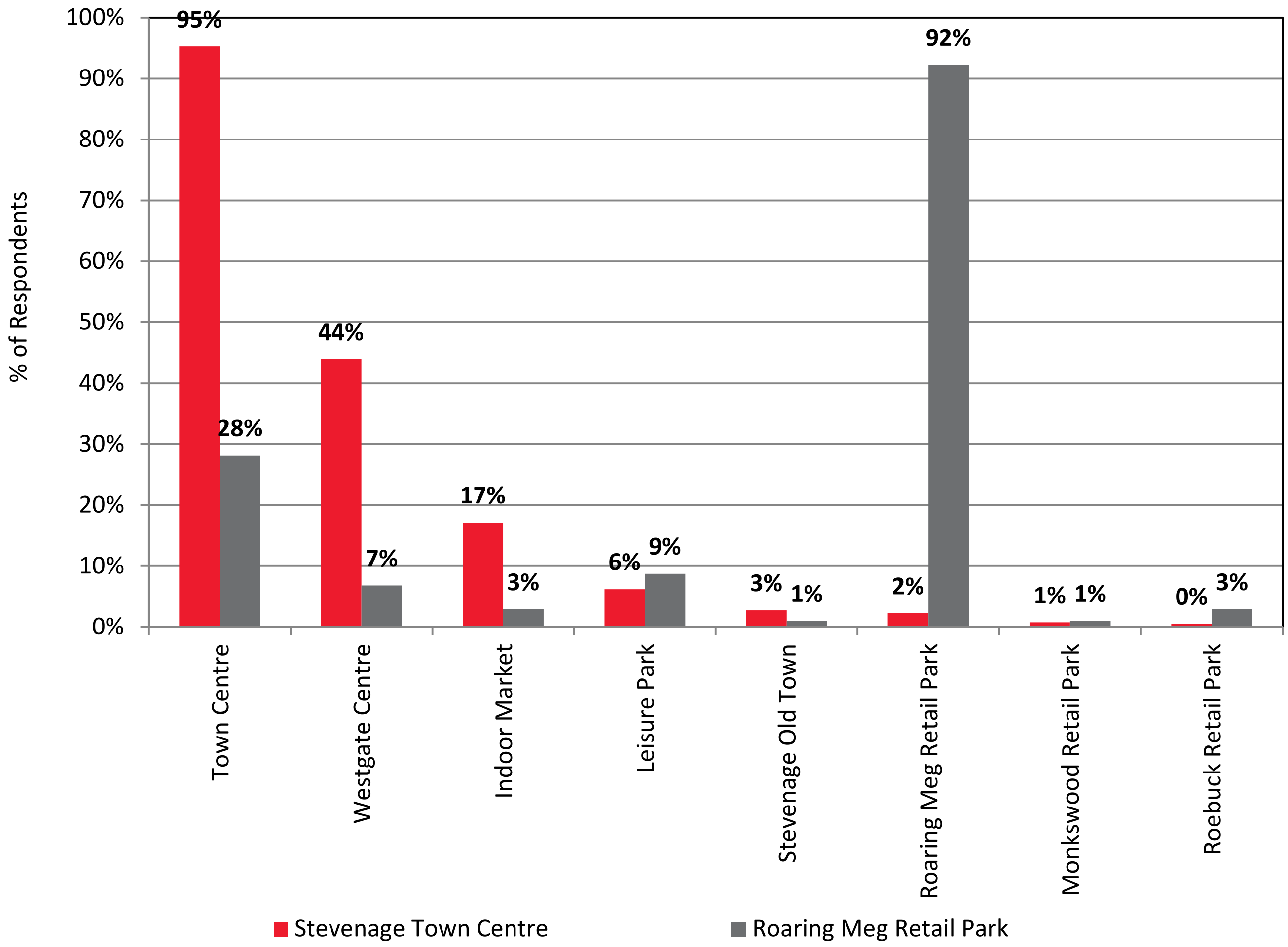
Shopping for non grocery and grocery items were the most popular reasons for visiting



- Stevenage is attracting shoppers for a number of different reasons. Often when a centre is frequented as often as Stevenage is it is grocery shopping that drives footfall. This is not the case for Stevenage as 40% of people surveyed were in the town centre to shop.
- 17% were there to grocery shop, 11% on business, 9% meeting friends and 8% had an appointment.
- The centre does well serving its local community, it will never be able to have a retail offer that suits the needs of the full demographic spectrum. It may be best served focussing on the core local market and trying to improve the offer enough to entice more of the middle income shoppers from surrounding areas. The Wealthy Achievers are always likely to shop in more Premium destinations which Stevenage is a long way off being.

Visited or Intended to Visit

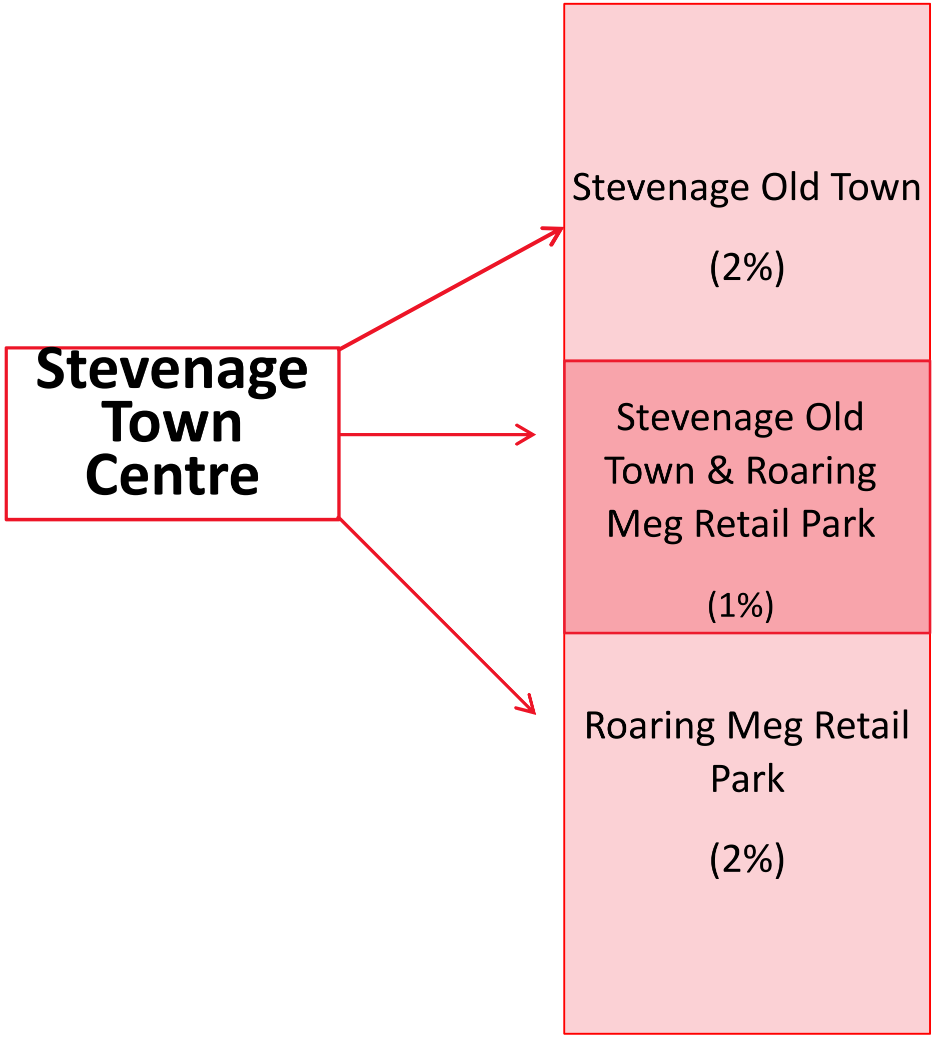
Shoppers going to Stevenage town centre tend not to shop anywhere else on that trip



- People shopping in Stevenage town centre tend to only shop the town centre on that particular trip. Linked trips with other parts of Stevenage such as Old Town or Roaring Meg Retail Park are rare.
- 95% of those surveyed in Stevenage were planning to visit the town centre, 44% were going to visit the Westgate Centre and 17% the Indoor Market. These are all in close proximity to the town centre. As distance from the town centre increases the likelihood of shoppers visiting that area declines. For example, just 2% of shoppers in the town centre were planning to visit Roaring Meg.
- Conversely a higher proportion of those interviewed at Roaring Meg also planned to visit part of the town centre (38% planned to visit the town centre, Westgate Centre or Indoor Market.

Linked Trips – Stevenage Town Centre Respondents

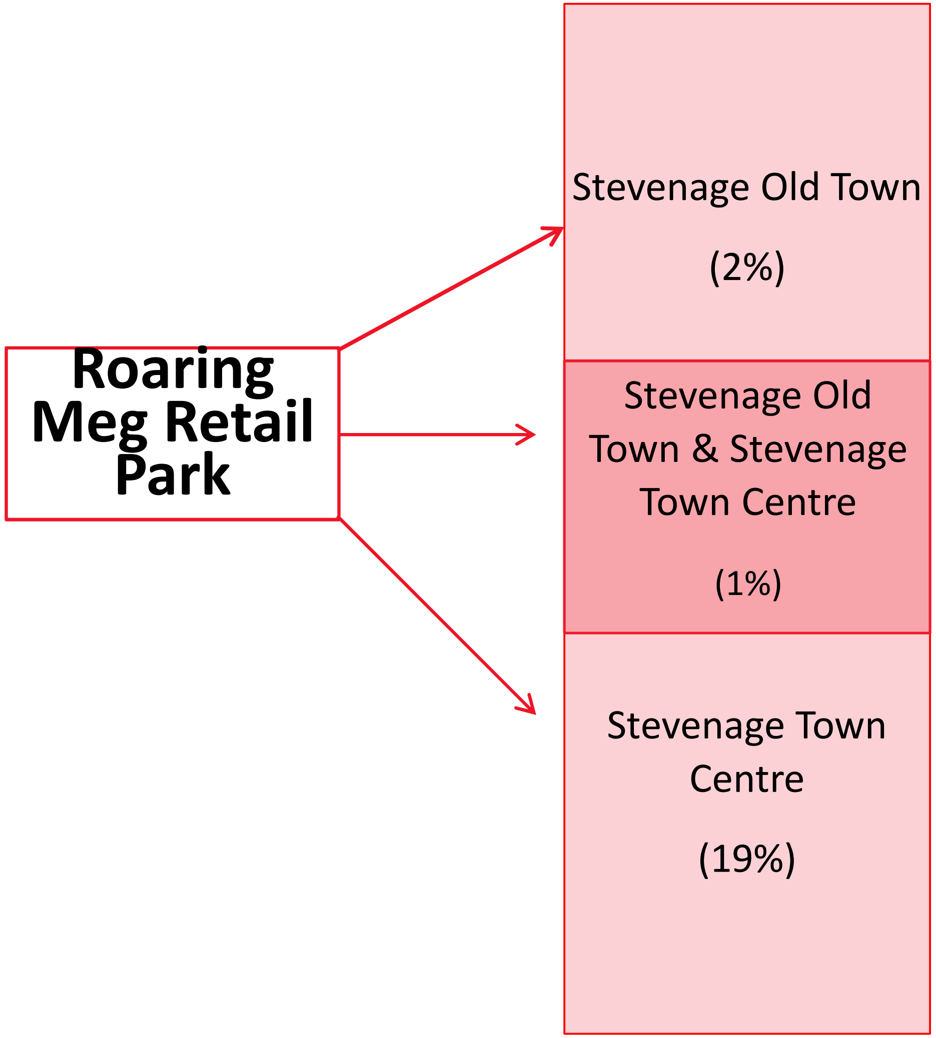
Town centre shoppers are making few trips to other retail destinations in Stevenage



- Those that shop in Stevenage town centre tend to not visit any other destinations on that particular trip.
- Of those shopping in Stevenage town centre only 2% had visited or intended to visit Roaring Meg Retail Park during that particular trip.

Linked Trips – Roaring Meg Retail Park Respondents

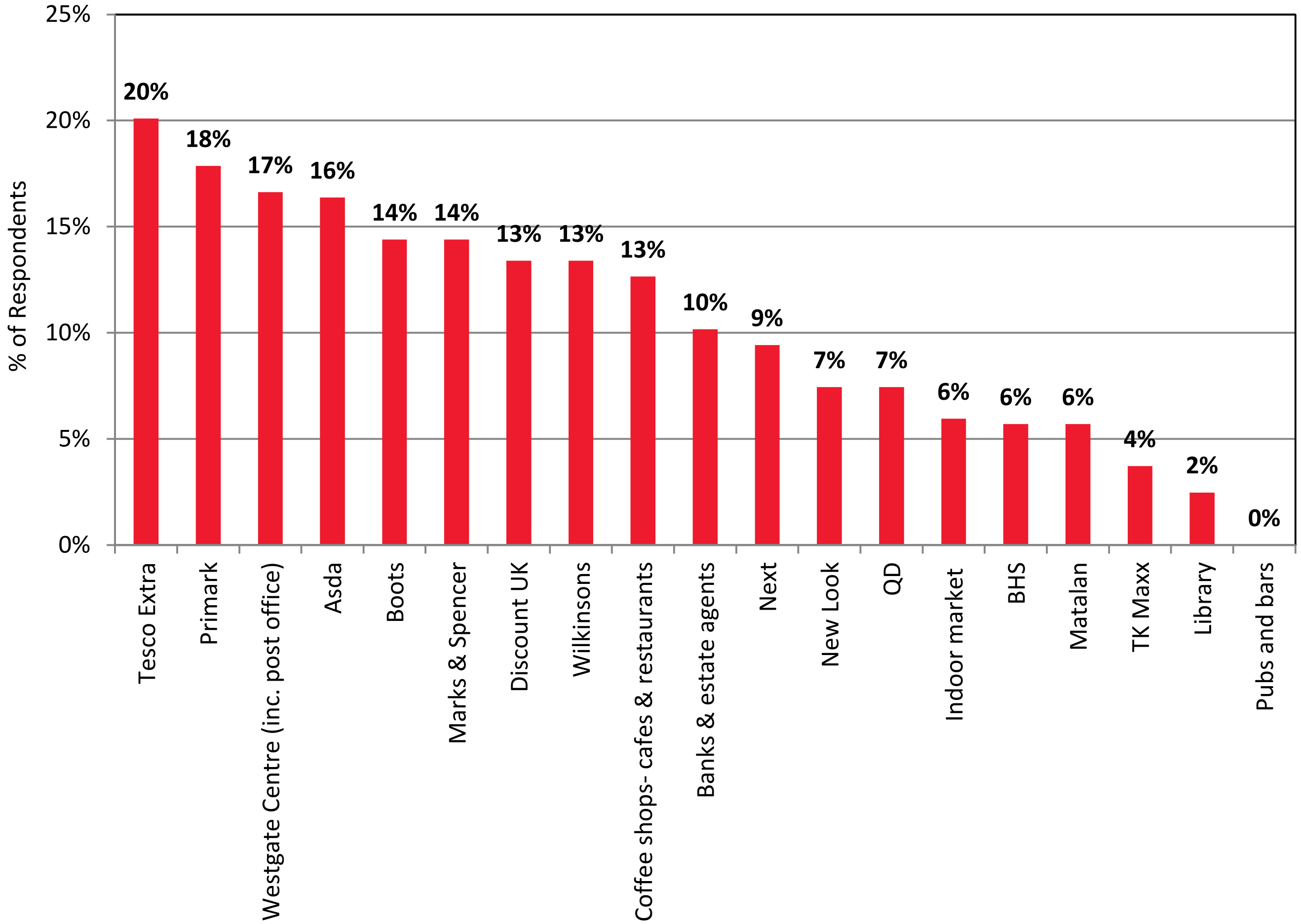
19% of respondents intended to visit Stevenage Town Centre



- There were 19% of respondents at Roaring Meg Retail Park who intended to or had visited Stevenage Town Centre on that particular trip.
- This could be as those shopper who visited Roaring Meg tend to travel by car, making it easy to travel between the two destinations.
- The town centre is easily accessible by car and has ample parking.
- 2% of respondents also intended to visit Stevenage Old Town.

Where visited in Stevenage

Tesco Extra, Primark and the Westgate Centre were the most visited locations in Stevenage



- Tesco Extra was the most popular retailer amongst respondents, with 20% visiting a further 16% visited Asda.
- Often grocery stores are far more popular than other Comparison Goods brands and tend to drive visit frequency to centres. This does not appear to be the case with Stevenage. Primark (18%), Westgate Centre (17%), Boots (14%) and Marks & Spencer (14%) were all popular.

Expenditure

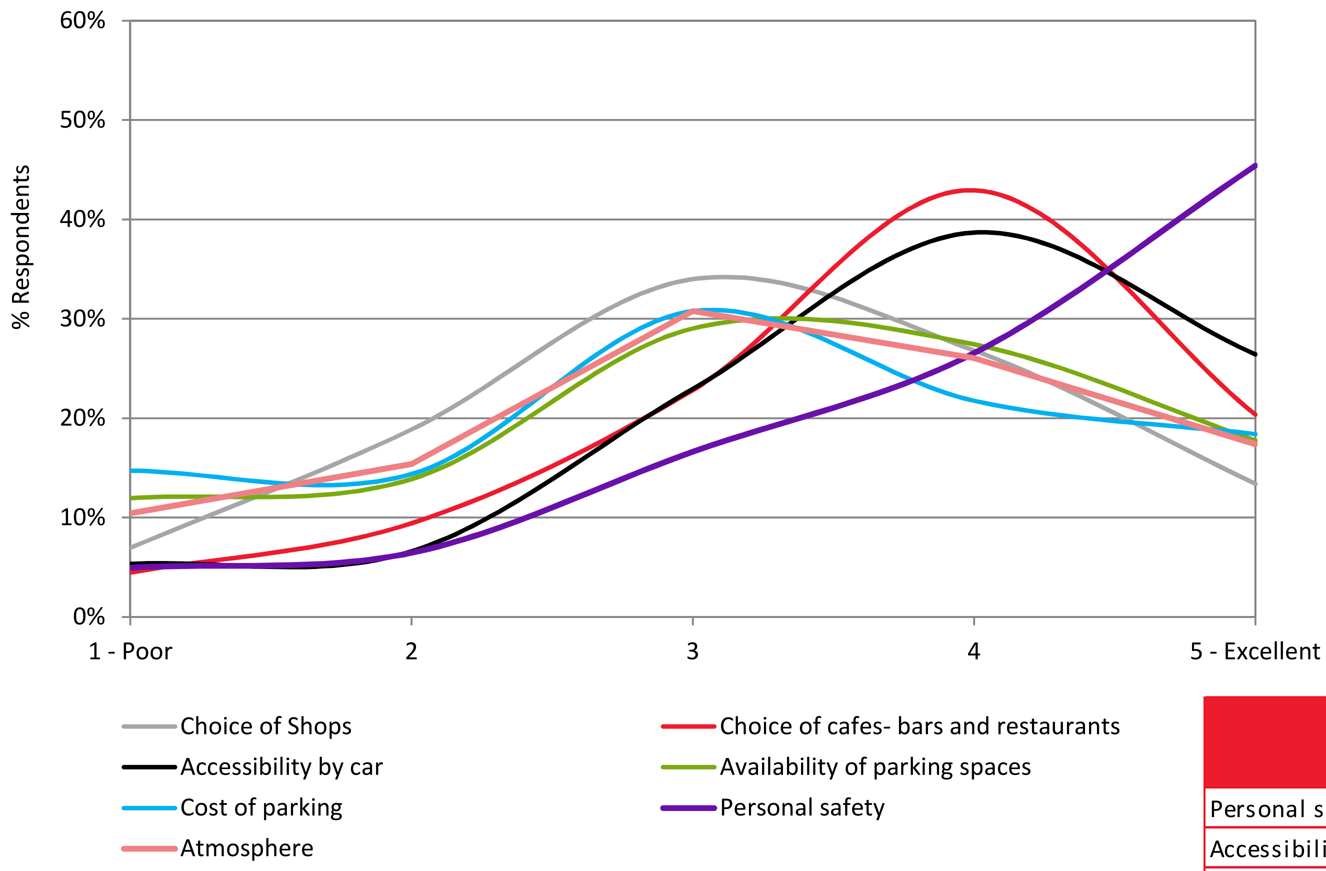
75.7% of respondents made a purchase in Stevenage; 41.7% spent at catering outlets in the town

	Average Spend £ (All Respondents)	Average Spend £ (Spenders Only)	Number of Spenders	Conversion Rate (%)
Retail	£31.26	£41.30	305	75.7%
Catering	£3.83	£9.19	168	41.7%

- The average retail spend in Stevenage town centre was £31.26 with a high conversion rate of 75.7%.
- Spend on catering was £9.19 with another strong conversion rate of £9.19.
- These figures are reasonably strong for a town centre. The Mass market and Value offer of the centre is serving the local catchment well.

Stevenage Rating

Highest rating for personal safety (4.0) and the lowest rating for cost of parking (3.1)

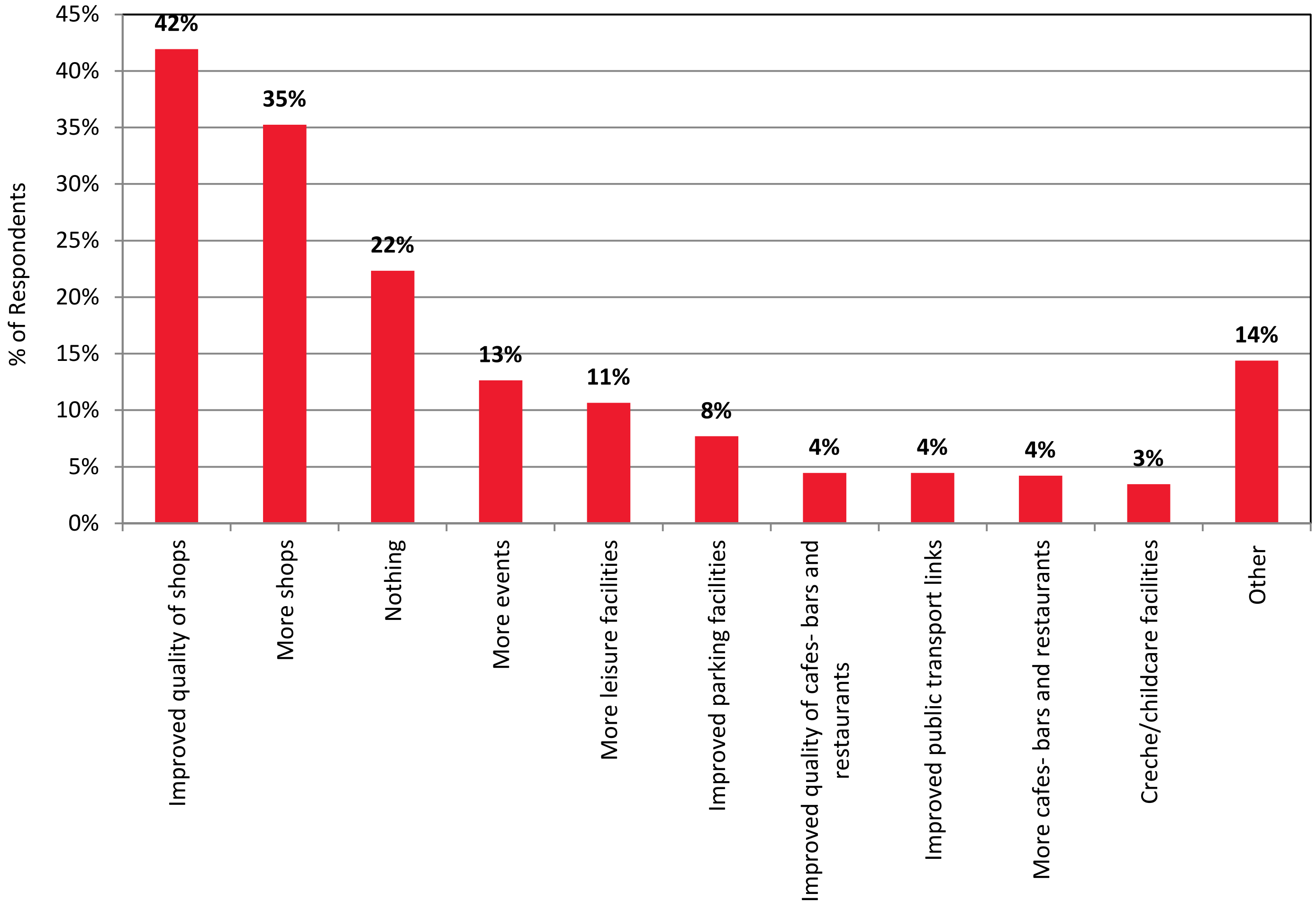


- The cost of parking received the lowest rating (3.1 out of 5), this is more an awareness issue as 56% of respondents were unaware that parking was free after 4pm.
- Choice of shops (3.2) and atmosphere (3.2) also scored low.
- The highest score was for personal safety (4.0) and accessibility by car (3.7). The ease of access by car may explain the high proportion of shoppers arriving at the centre by car.

	Average Rating (out of 5)
Personal safety	4.0
Accessibility by car	3.7
Choice of cafes- bars and restaurants	3.7
Availability of parking spaces	3.3
Atmosphere	3.2
Choice of Shops	3.2
Cost of parking	3.1

Encourage more visits to Stevenage

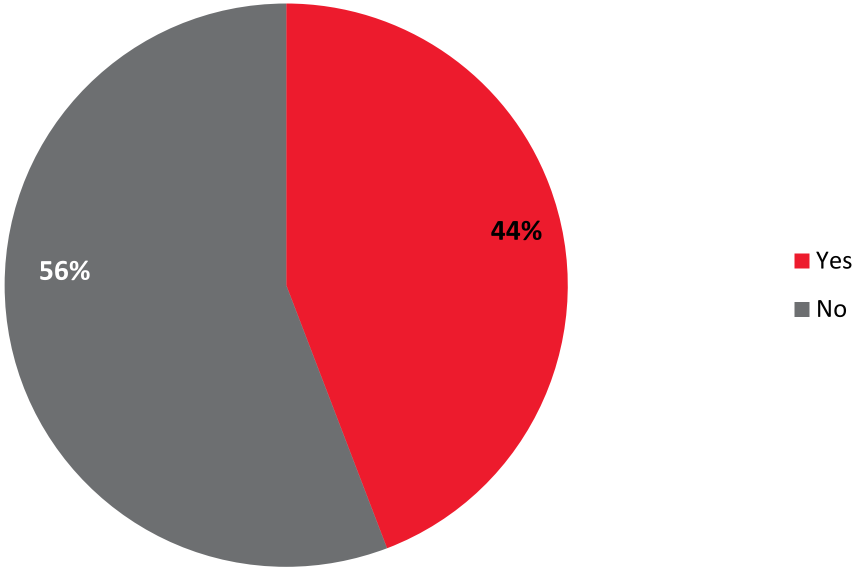
Improving the quality and number of shops would encourage respondents to visit Stevenage more often



- 22% of respondents stated that no improvements to the town centre would encourage them to visit more. This can be interpreted as a positive as they like the town centre as it is.
- 42% of respondents would visit more if the quality of shops was improved and 35% would visit more if there were more shops. Despite having a loyal customer base who are interacting well with the town centre there is clearly some work to be done to improve the retail mix of the town.

Aware of Free Parking after 4pm in Stevenage on weekdays

44% of respondents aware of free parking scheme



- Respondents were asked if they were aware that Stevenage town centre offers free parking after 4pm on weekdays.
- There were 44% of respondents who were aware of the free parking initiative. This is fairly high which is encouraging that there is awareness of the initiative .

Additional Comments

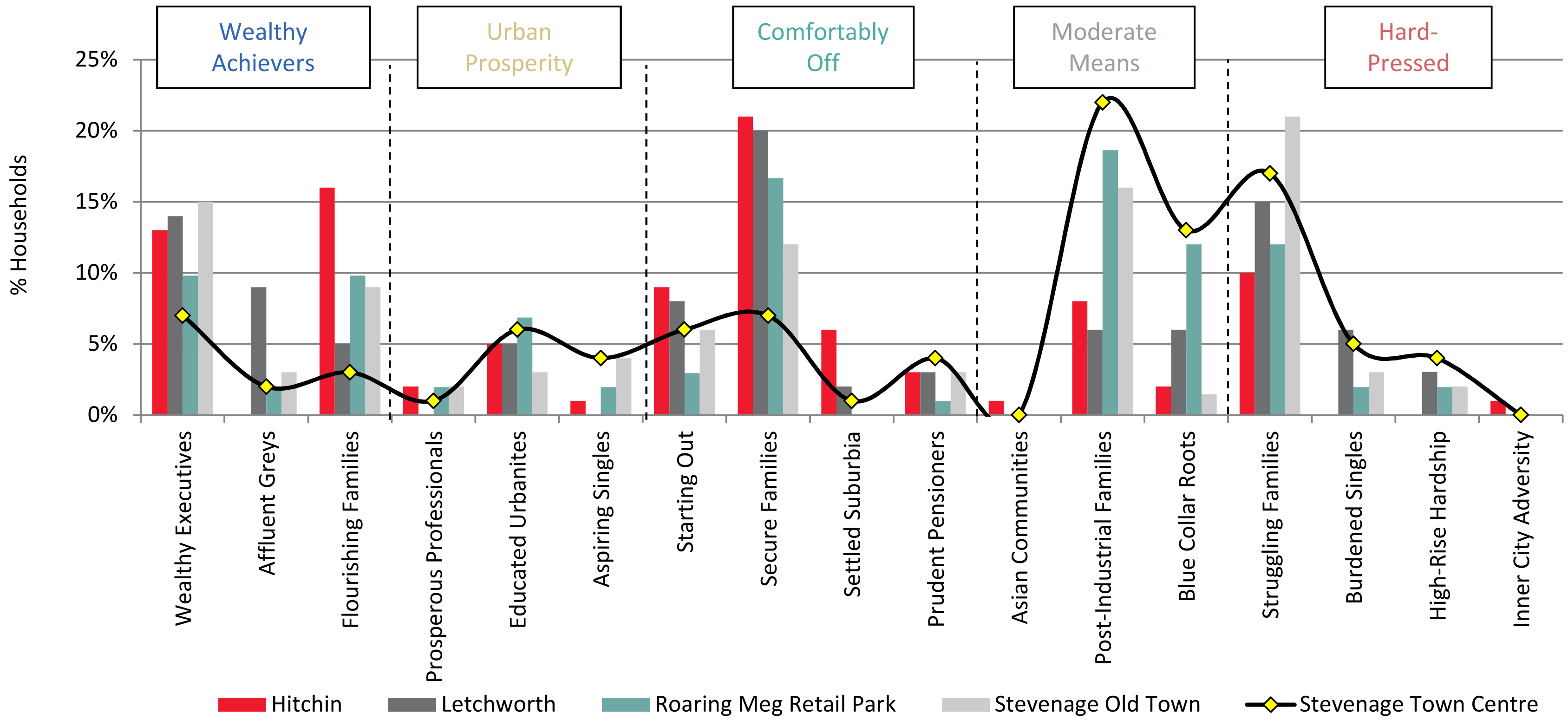
- "Too many low quality shops, need more brands"
- "Town needs updating"
- "Need improvement of shops, too many pound shops"
- "Centre is drab and depressing"
- "More upmarket shops, the elderly don't feel safe here"
- "More men's stores"
- "A department store is needed such as John Lewis"
- "Parking is not cheap for up to 3 hours"
- "Need to update town to make it modern"
- "Shuttle bus to roaring meg retail park or more toy shops"
- "Revamp"
- "Cigarettes on floor"
- "Please a department store and rejuvenate the town centre"

7. Survey Analysis

7.2 Hitchin, Letchworth, Roaring Meg Retail Park & Stevenage Old Town

ACORN Profile Surveys

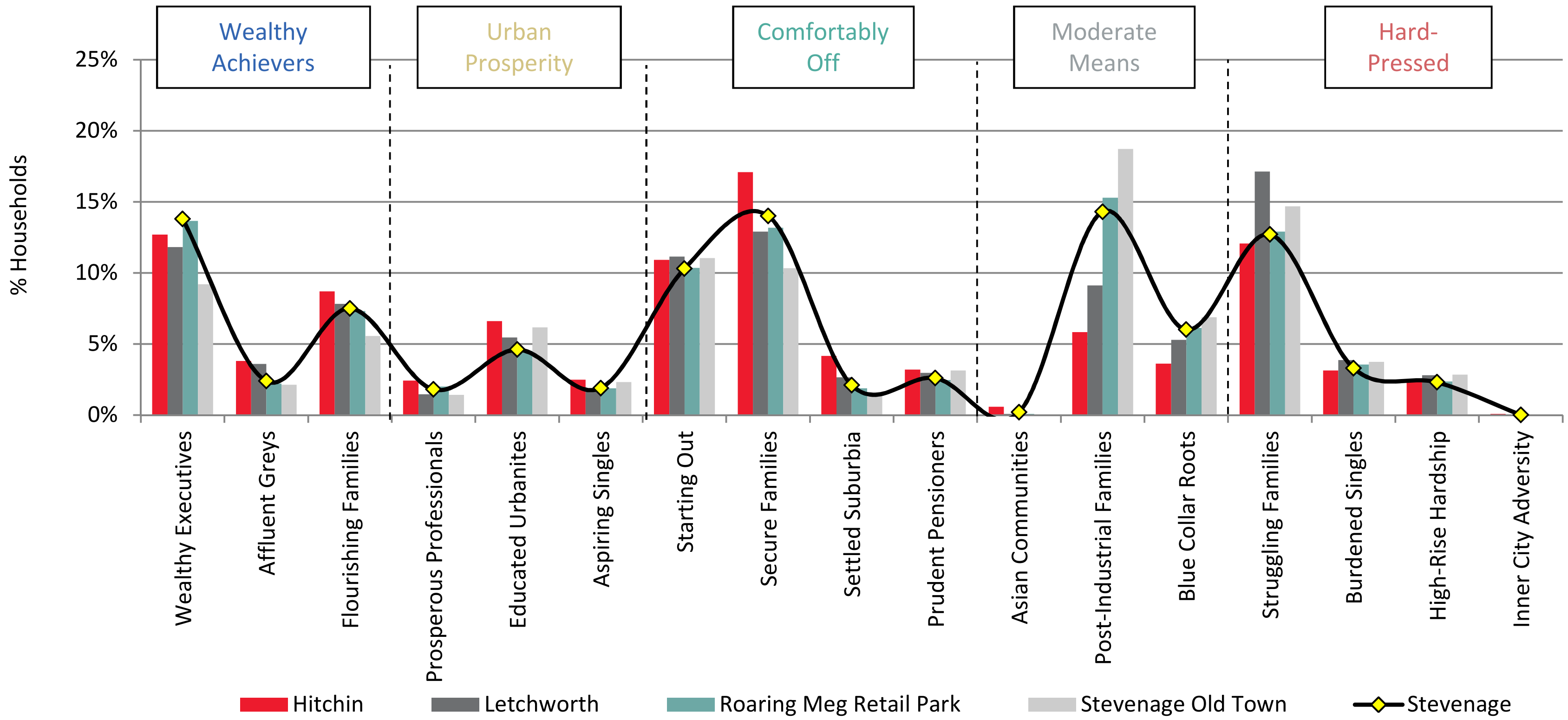
All four other locations have a more affluent shopper profile than Stevenage town centre



- All four other survey locations have more affluent shopper profiles that Stevenage town centre. They also attract considerably more of the Secure Families. This group make up 7% of shoppers in the Stevenage town centre survey but make up 14% of the catchment. Currently the town is doing a poor job of attracting them. These groups like to shop at Mass market brands, with less preference for Premium brands than the more affluent groups. Adding some more Mass market retailers to Stevenage town centre will encourage more Secure Families to visit but not deter the less affluent, core shopper groups as they will be able to trade up and shop at the same stores as the Secure Families.

ACORN Profile Retail Footprint Catchment

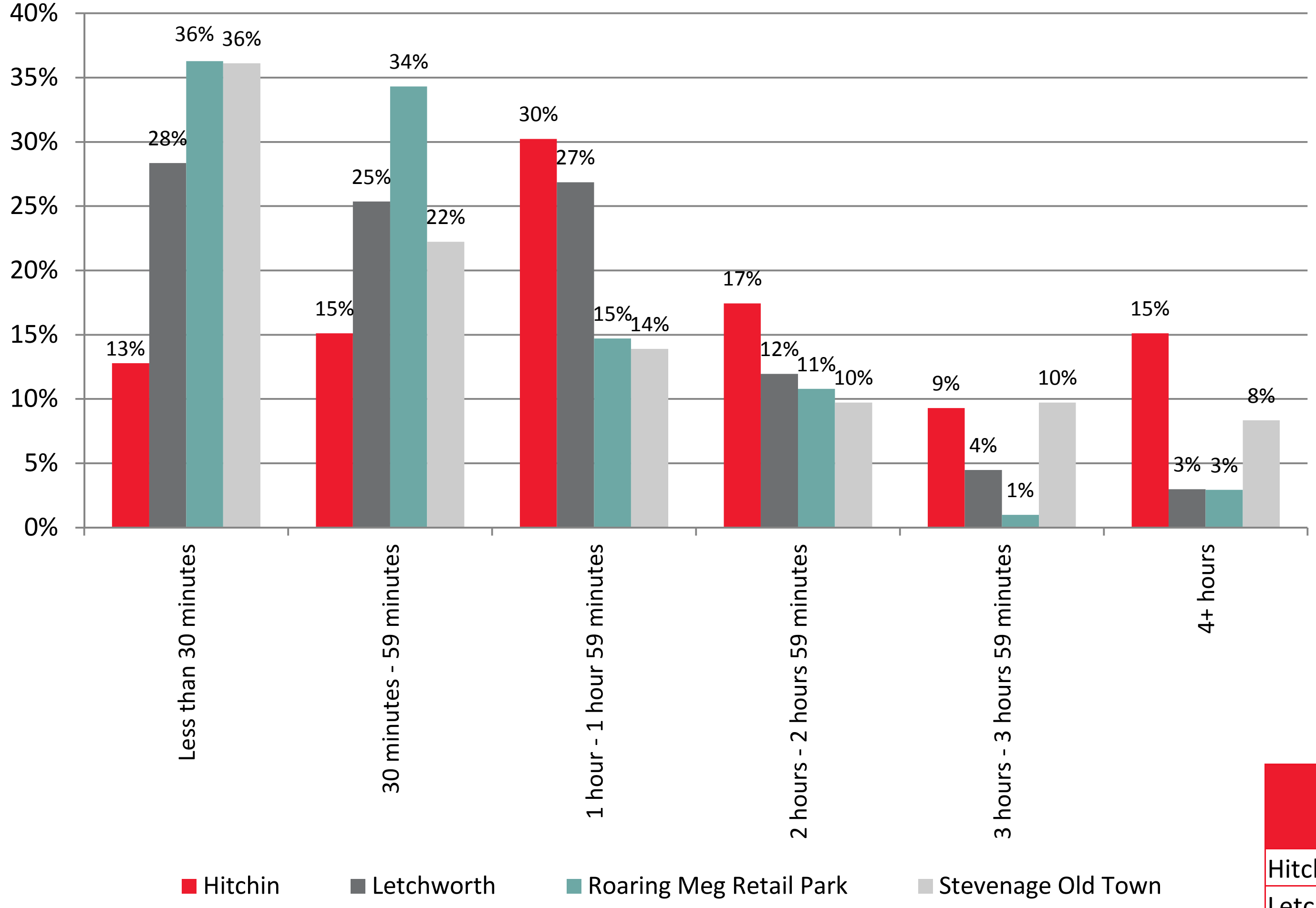
All 5 locations have a fairly similar Retail Footprint catchment ACORN profile



- The graph shows the ACORN profiles of the Retail Footprint catchments for each survey location. Compared to the RF catchment Stevenage is attracting less of the affluent ACORN groups as the retail mix is not attracting these shoppers. Conversely Hitchin is attracting a greater proportion of Flourishing Families and Secure Families compared to its RF catchment. The retail mix at Hitchin including Fat Face, White Stuff and Phase Eight appeal to these more affluent shoppers. The Retail Footprint catchments are all fairly similar and it is the retail mix which is driving different ACORN groups to visit each location. Letchworth is attracting a greater proportion of Affluent Greys compared to its Retail Footprint catchment.

Dwell

Hitchin has the longest dwell time at 107 minutes

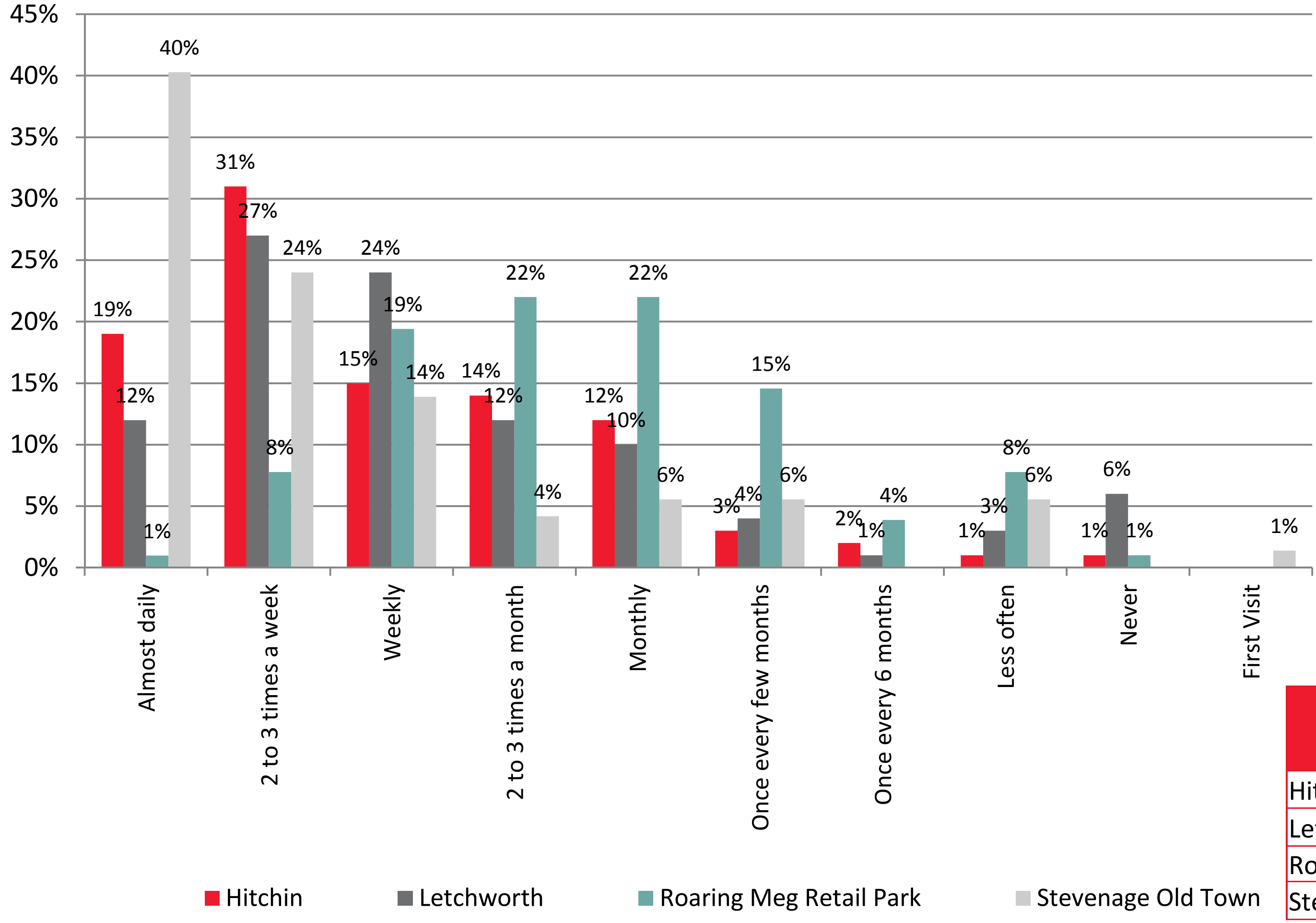


- Hitchin has the longest dwell time of alternative survey locations at 107 minutes. This is considerably higher than the 75 minutes observed at Stevenage town centre.
- Stevenage Old Town has an average dwell time of 86 minutes, Letchworth 62 minutes and Roaring Meg Retail Park 50 minutes.

	Average Dwell (minutes)
Hitchin	107
Letchworth	62
Roaring Meg Retail Park	50
Stevenage Old Town	86

Frequency of Visit

Stevenage Old Town most frequently visited destination

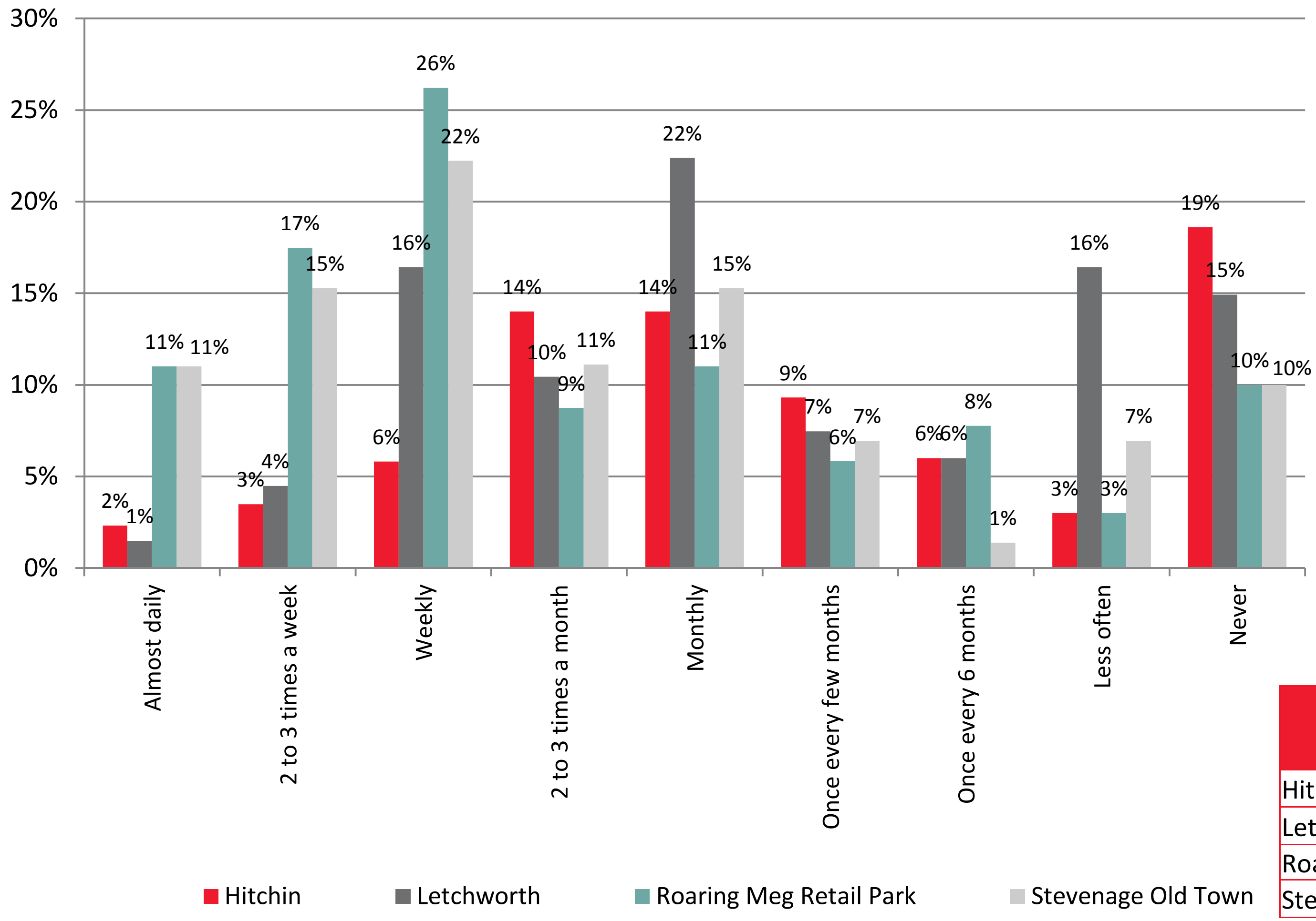


- Stevenage Old Town has the highest annualised frequency (117 visits). This is due to the presence of a Waitrose and Tesco Metro, the convenience market is driving frequent visits to this part of town.
- Hitchin and Letchworth both have lower annualised frequencies than Stevenage (94 visits per year). Visits to Roaring Meg Retail Park are lowest, the retail park has a limited offer therefore people only visit when they require an item that can be found there. People wouldn't browse a retail park like they might do a town centre.

	Frequency Annualisation
Hitchin	86
Letchworth	69
Roaring Meg Retail Park	29
Stevenage Old Town	117

Frequency of Visit Stevenage Town Centre

Roaring Meg respondents visit Stevenage Town Centre most frequently

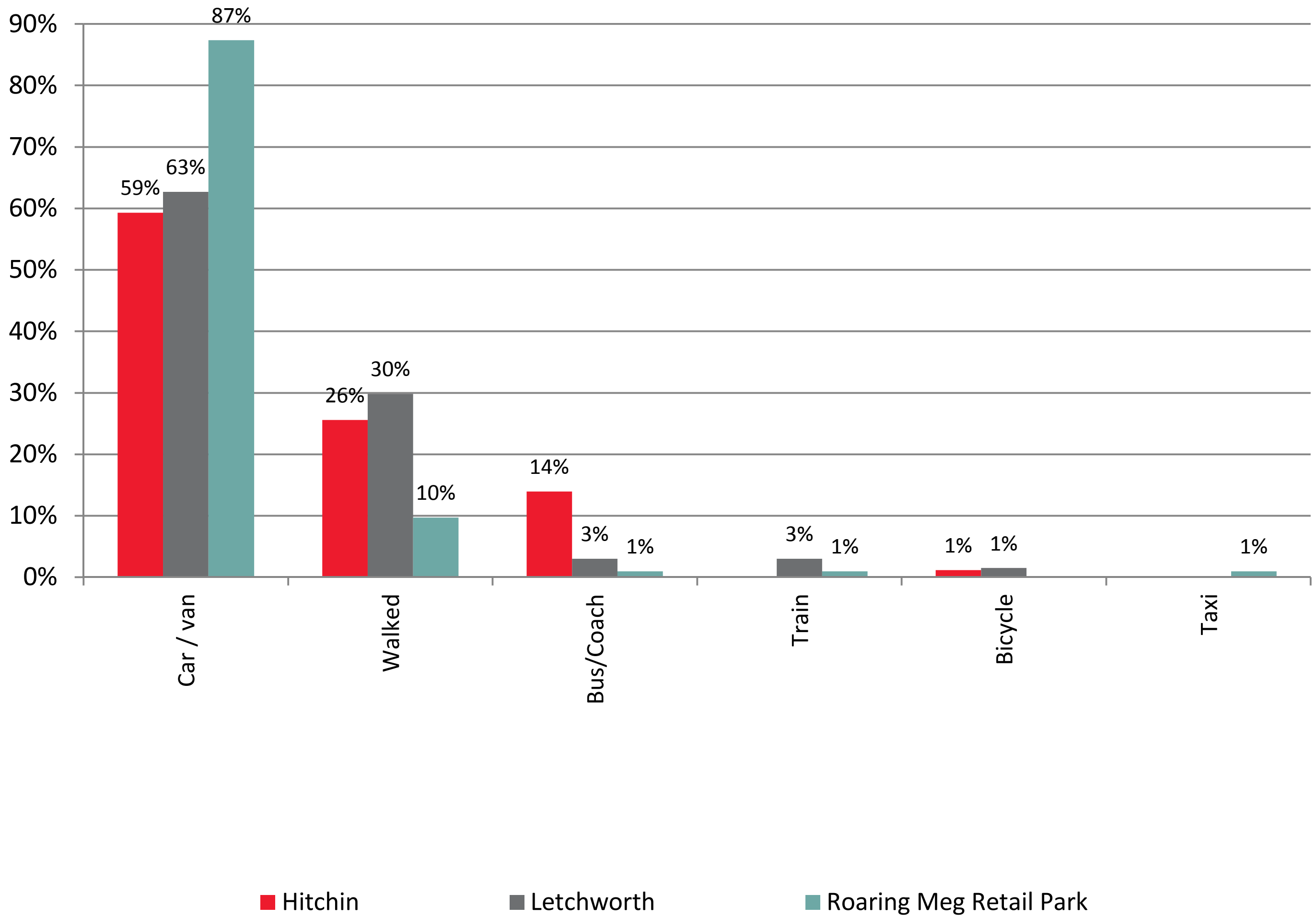


- Roaring Meg and Old Town respondents visit Stevenage town centre more frequently than shoppers in Hitchin and Letchworth do, 58 and 55 times per annum respectively.
- Those interviewed in Letchworth visit 22 times per year on average and those interviewed in Hitchin visit 17 times.
- This is partly due to location, Roaring Meg and Old Town are closer to Stevenage town centre, but also to do with demographics. The ACORN profile of Hitchin and Letchworth is different to that of Stevenage.

	Frequency Annualisation
Hitchin	17
Letchworth	22
Roaring Meg Retail Park	58
Stevenage Old Town	55

Mode of Transport

Car/van the most popular form of transport across all centres



- Across all centres the greatest proportion of respondents were arriving by car/van.
- Roaring Meg Retail Park had 87% of respondents travelling by car. This is expected as retail parks tend to attract car borne shoppers.
- Letchworth had the greatest proportion of respondents travelled on foot (30%).
- Hitchin had the most respondents visiting by bus/coach.

Rating of Location

Roaring Meg rated highest for cost of parking, Hitchin rated highest for atmosphere, Letchworth & Old Town rated highest for personal safety

	Average Rating (out of 5)						
	Choice of Shops	Choice of cafes- bars and restaurants	Accessibility by car	Availability of parking spaces	Cost of parking	Personal safety	Atmosphere
Hitchin	3.8	4.5	3.7	3.3	2.7	4.5	4.6
Letchworth	2.5	3.7	3.9	3.4	3.5	4.4	3.4
Roaring Meg Retail Park	3.6	2.9	4.5	3.9	4.7	4.6	3.5
Stevenage Old Town	3.2	3.8	3.7	3.4	3.5	4.4	4.1
Stevenage Town Centre	3.2	3.7	3.7	3.3	3.1	4.0	3.2
Stevenage Overall *(Town Centre, Roaring Meg and Old Town combined)*	3.3	3.5	3.9	3.4	3.5	4.2	3.4

- Respondents were asked to rate various aspects at the area they were surveyed.
- Hitchin was rated highest for atmosphere and lowest for cost of parking.
- Letchworth was rated highest for personal safety and lowest for choice of shops.
- Roaring Meg Retail Park was rated highest for coast of parking and lowest for choice of cafes and bars.
- Old Town was rated highest for personal safety and lowest for choice of shops.
- The combined Stevenage profile has the highest rating for personal safety and lowest for choice of shops.

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Rating of Stevenage Town Centre

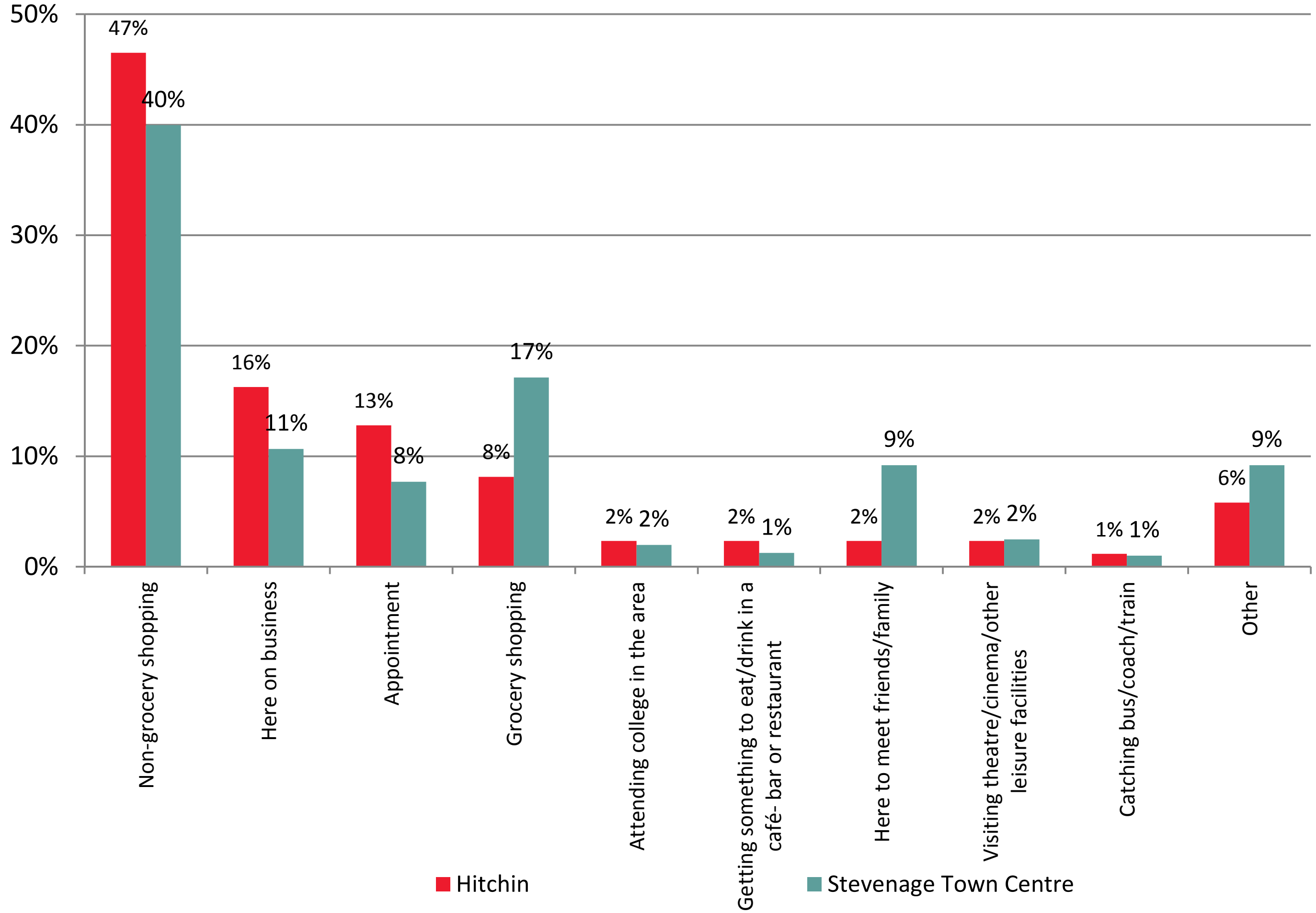
Highest ratings for choice of shops, accessibility by car & personal safety

	Average Rating (out of 5)						
	Choice of Shops	Choice of cafes- bars and restaurants	Accessibility by car	Availability of parking spaces	Cost of parking	Personal safety	Atmosphere
Hitchin	3.2	2.7	3.8	3.4	3.0	3.4	2.4
Letchworth	3.7	3.3	3.3	3.1	2.5	3.2	2.9
Roaring Meg Retail Park	3.0	3.4	3.7	3.1	2.7	3.9	2.8
Stevenage Old Town	2.8	3.0	3.8	3.7	2.9	3.7	2.6

- The respondents at each survey location were asked to rate different aspects of Stevenage.
- The atmosphere in Stevenage is rated low across all four centres. It appears that there is a perception issue.
- Respondents in Hitchin rated Stevenage highest for accessibility by car.
- Lewtchworth respondents rated Stevenage highest for choice of shops.
- Roaring Meg Retail Park shoppers rated Stevenage highest for personal safety.
- Old Town respondents rated Stevenage highest for accessibility by car.

Hitchin – Reason for Visit

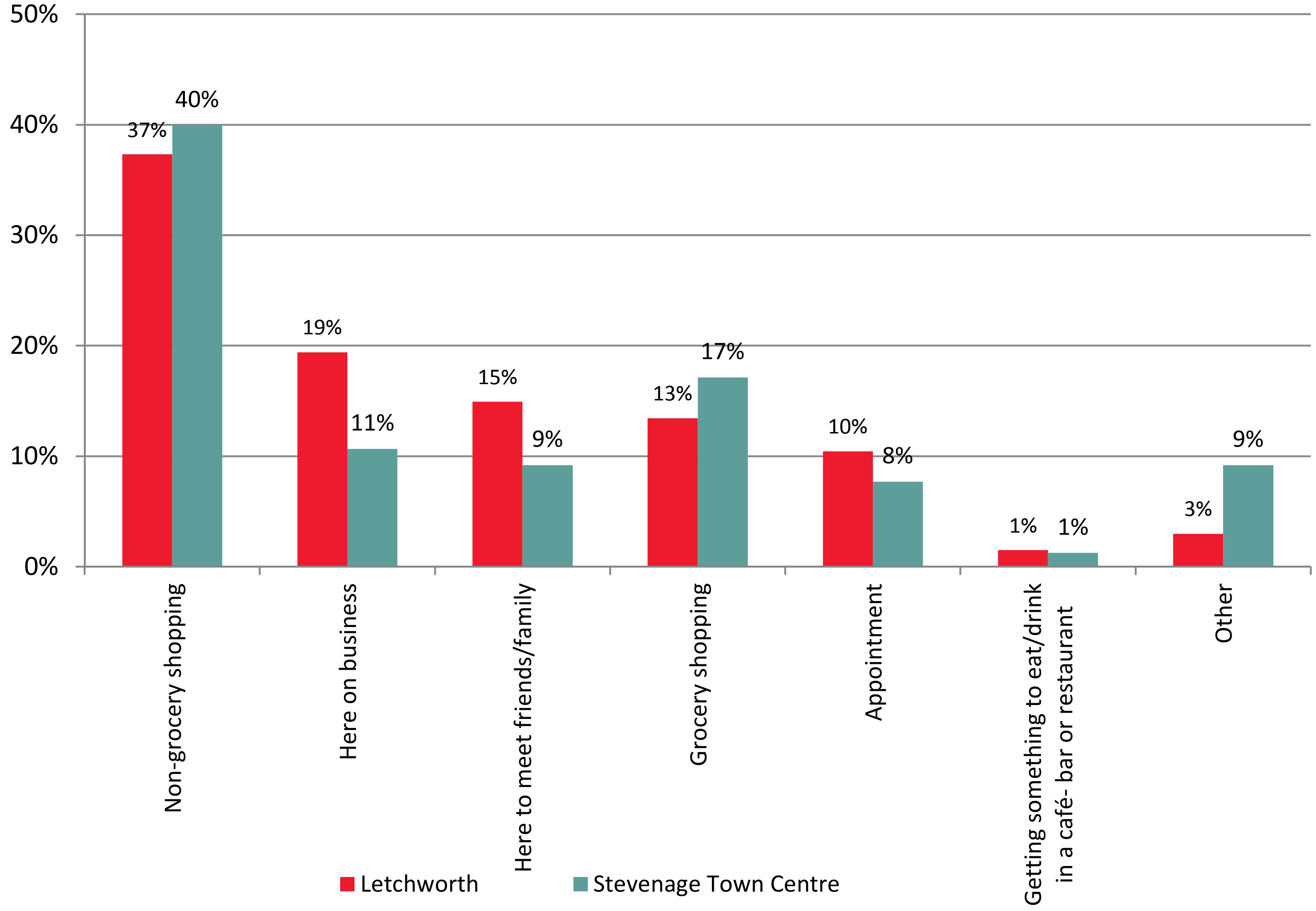
47% of respondents visiting Hitchin for non-grocery shopping



- The most popular reason respondents were visiting Hitchin was for non-grocery shopping (47%). This is higher than in the Stevenage town centre survey (40%), indicating the retail mix at Hitchin may be more extensive.
- Other reasons for visiting Hitchin include visiting the bank, car repair, for a look around and to visit the market.

Letchworth – Reason for Visit

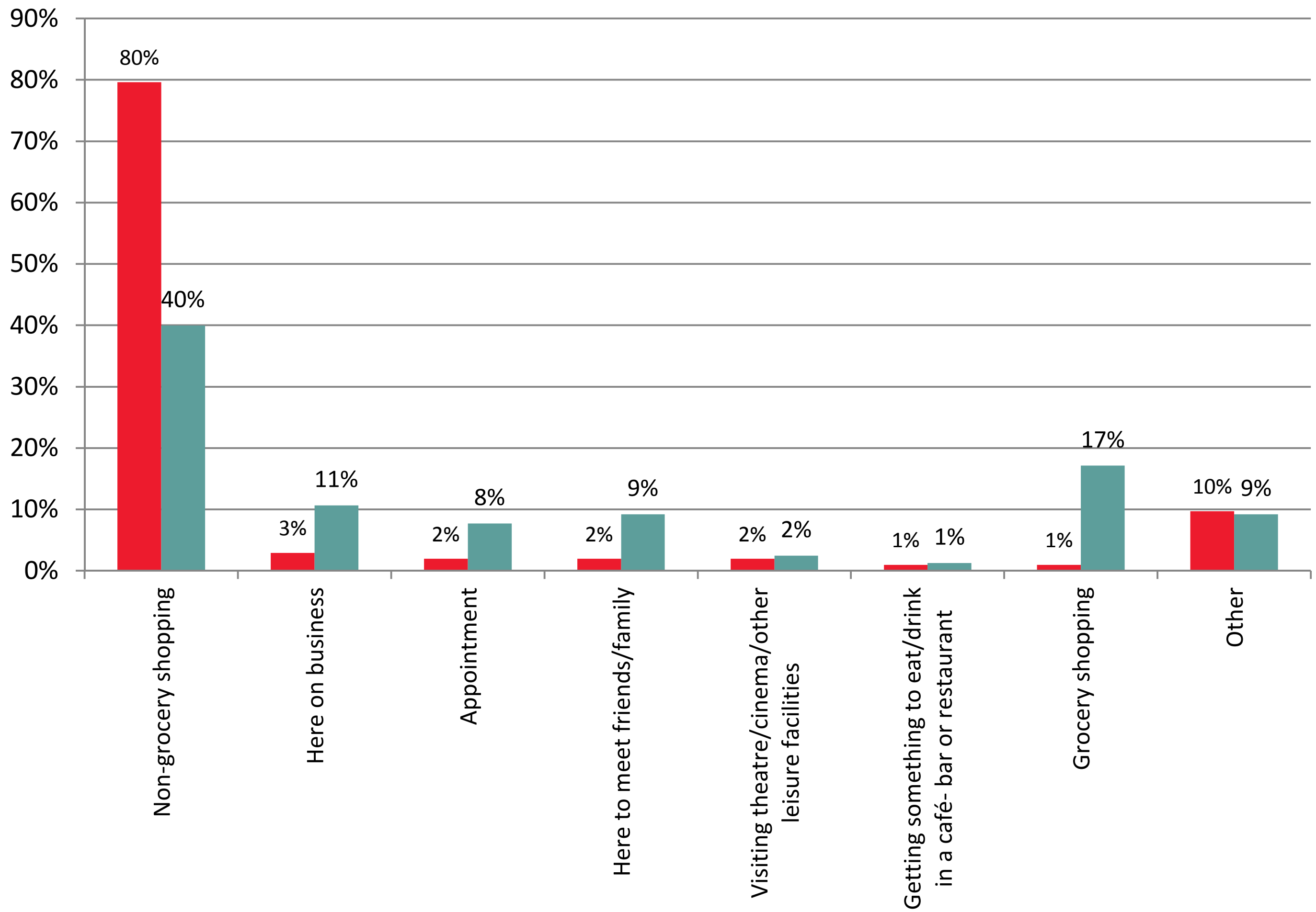
Non grocery shopping and here on business most popular responses



- The greatest proportion of respondents were visiting Letchworth for non-grocery shopping (37%) and for business (19%).
- Other reasons for visiting Letchworth included to get my car service and to pay a bill.

Roaring Meg Retail Park – Reason for Visit

Majority of respondents visiting for non-grocery shopping



- The majority of respondents were visiting Roaring Meg Retail Park for non-grocery shopping (80%). This is to be expected due to the nature of the retail park being a destination shoppers visit to make a specific purchase.
- Other responses include for a walk, car cleaning and to visit the gym.

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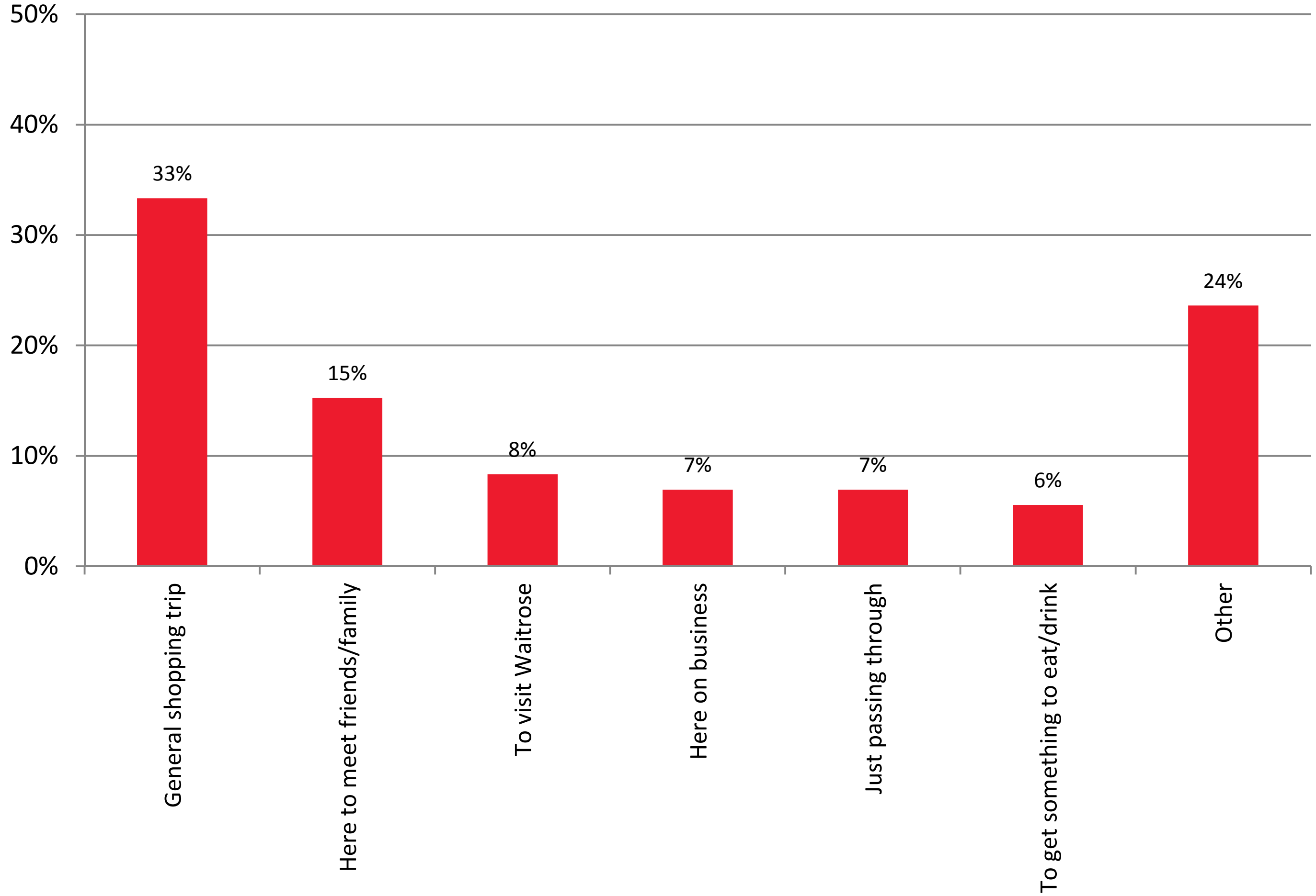
Stevenage Old Town– Reason for Visit

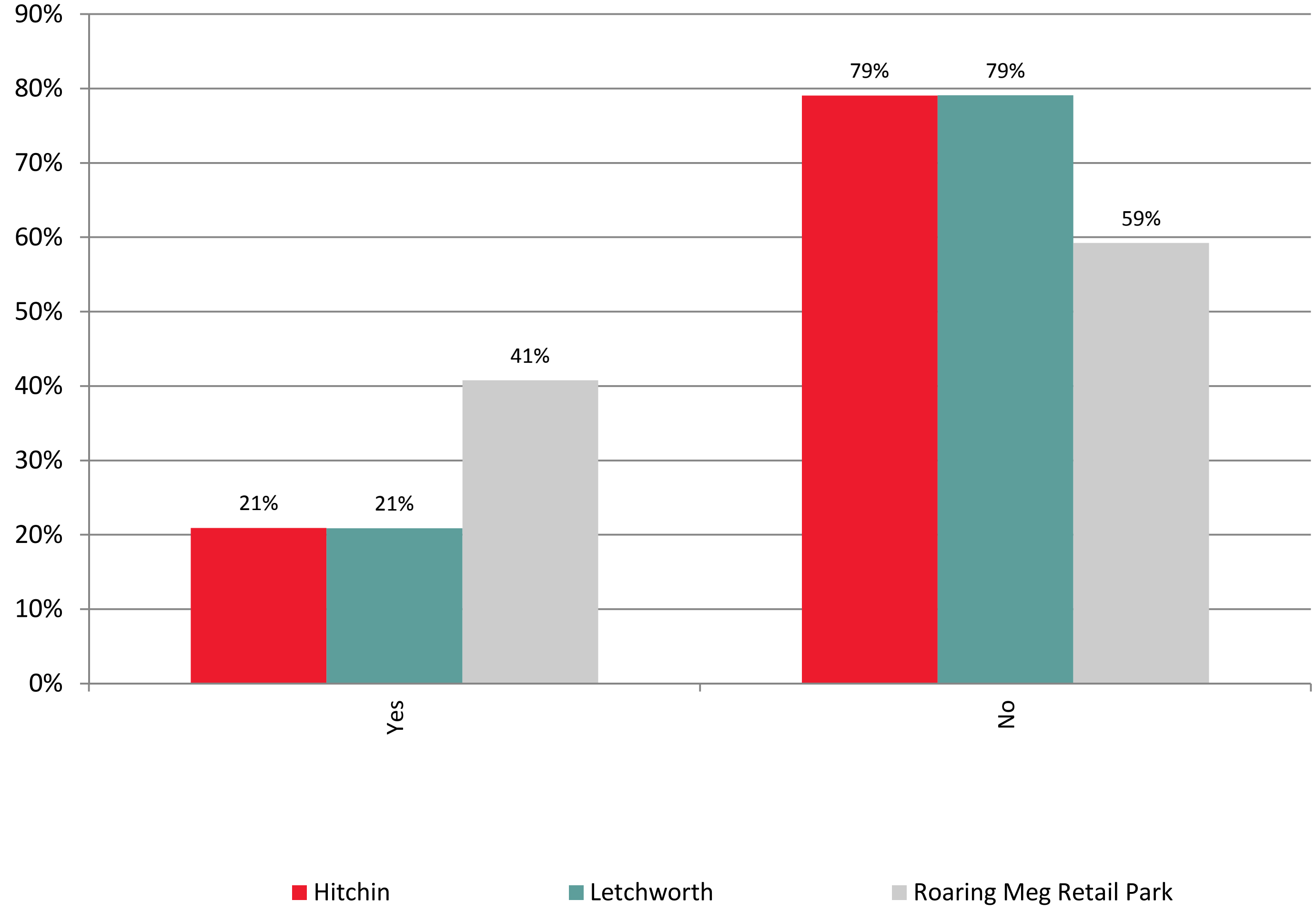
A third of respondents were visiting for a general shopping trip



- The greatest proportion of respondents were visiting Stevenage Old Town for general shopping.
- A further 15% were in Old Town to meet family/friends.
- Other responses included visiting church, for a wedding, getting a haircut and live in the area.

Awareness of free parking in Stevenage after 4pm on weekdays

Majority of respondents not aware of free parking



- In the Stevenage town centre survey 56% of respondents were not aware that parking is free after 4pm. Awareness was equally low in the other survey locations.
- 59% of those interviewed at Roaring Meg were unaware of the free parking. 79% of those interviewed at Hitchin and Letchworth were unaware.

8. Future Scenario Modelling

8.1 Methodology

Development Pipeline

There are three schemes planned in the area due to open by 2017

RF Centre	Scheme Name	Additional GLA (sqm)	Opening Date	Development Type
Biggleswade Retail Park	London Road Retail Park	2,288	2014	New Build
Hatfield	Hatfield Town Centre Redevelopment	8,042	2015	New Build
Northampton	Grosvenor Centre	42,734	2017	Extension

- The above table shows pipeline retail schemes in the local area that are likely to impact on the Stevenage catchment. The size and opening year of these has been extensively researched by CACI.
- CACI are aware of the bulky goods commitment at Roaring Meg but for the purpose of this study, which is focusing on the main comparison goods elements (i.e. non bulky), this potential change in floorspace is not included.

Scenario Summary

- The following future scenarios have been run to assess the change in the Stevenage catchment:

  - **1. 2017 Do Nothing:** This assumes no development at Stevenage town centre but the three competing schemes will go ahead. This measure the impact that these schemes will have on the Stevenage catchment if nothing changes in Stevenage.

  - **2. 2017 Improved Retail Mix at Stevenage:** This scenario assumes that the three pipeline schemes take place but also assumes that the retail offer in Stevenage is improved. To calculate the uplift in attractiveness score in Stevenage town centre CACI have assumed that the top 10 “missing” brands from the gap analysis take units in Stevenage and replace independent retailers on Queensway. This increases Stevenage’s score from 741 to 840, an increase of 13%.

  - The brands that have been included are H&M, Debenhams, Monsoon, Warehouse, Republic, Superdry, Build A Bear, Oasis, The Entertainer and Phase Eight. CACI do not expect all these retailers to take space at Stevenage but this is to show how much the score can be increased if the retail mix is tweaked.

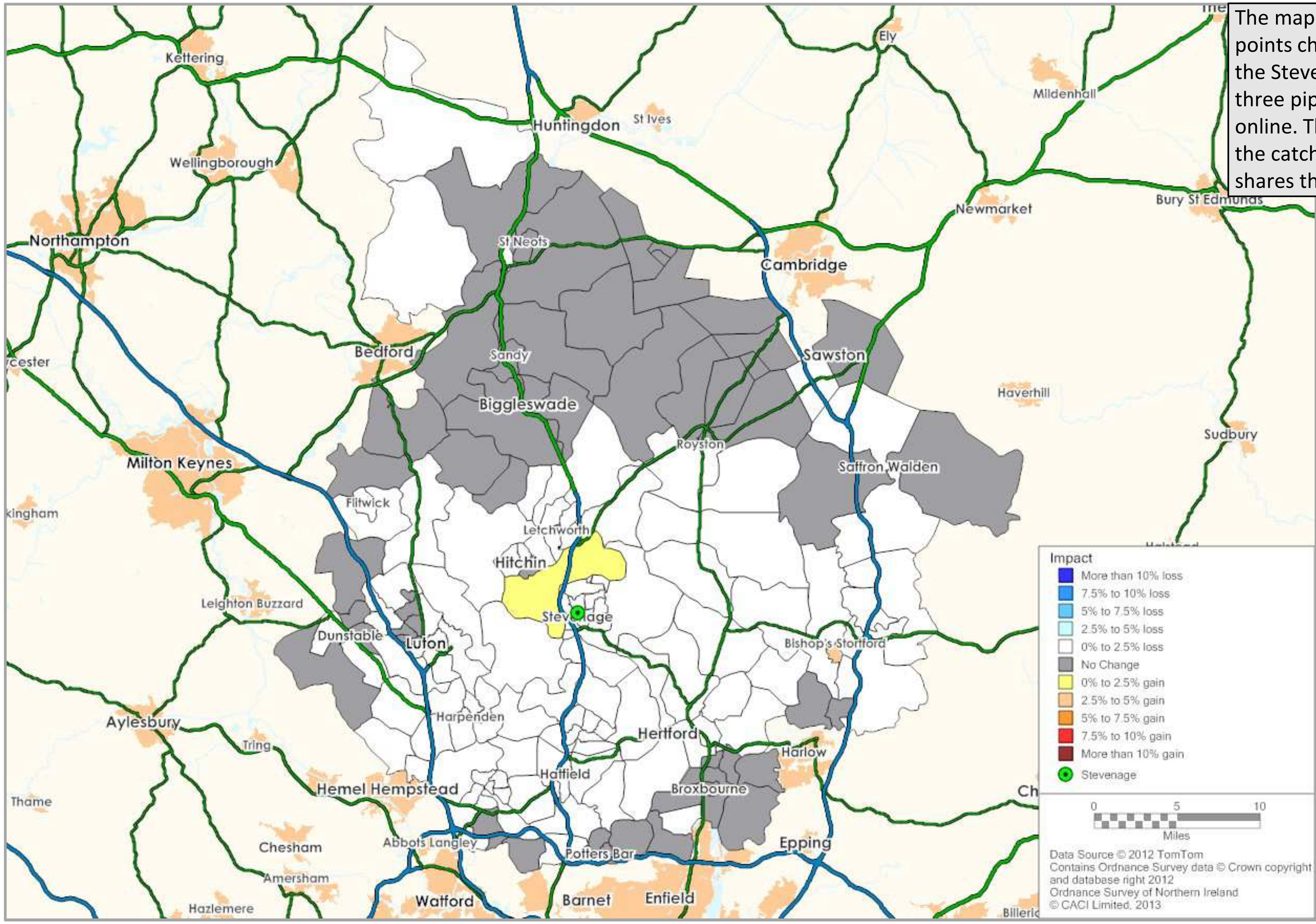
- A development year of 2017 has been assumed for all scenarios.

8. Future Scenario Modelling

8.2 2017: “Do Nothing” Scenario

Change in Market Shares: 2012 vs 2017 Do Nothing

The three developments will have very little impact on the Stevenage catchment



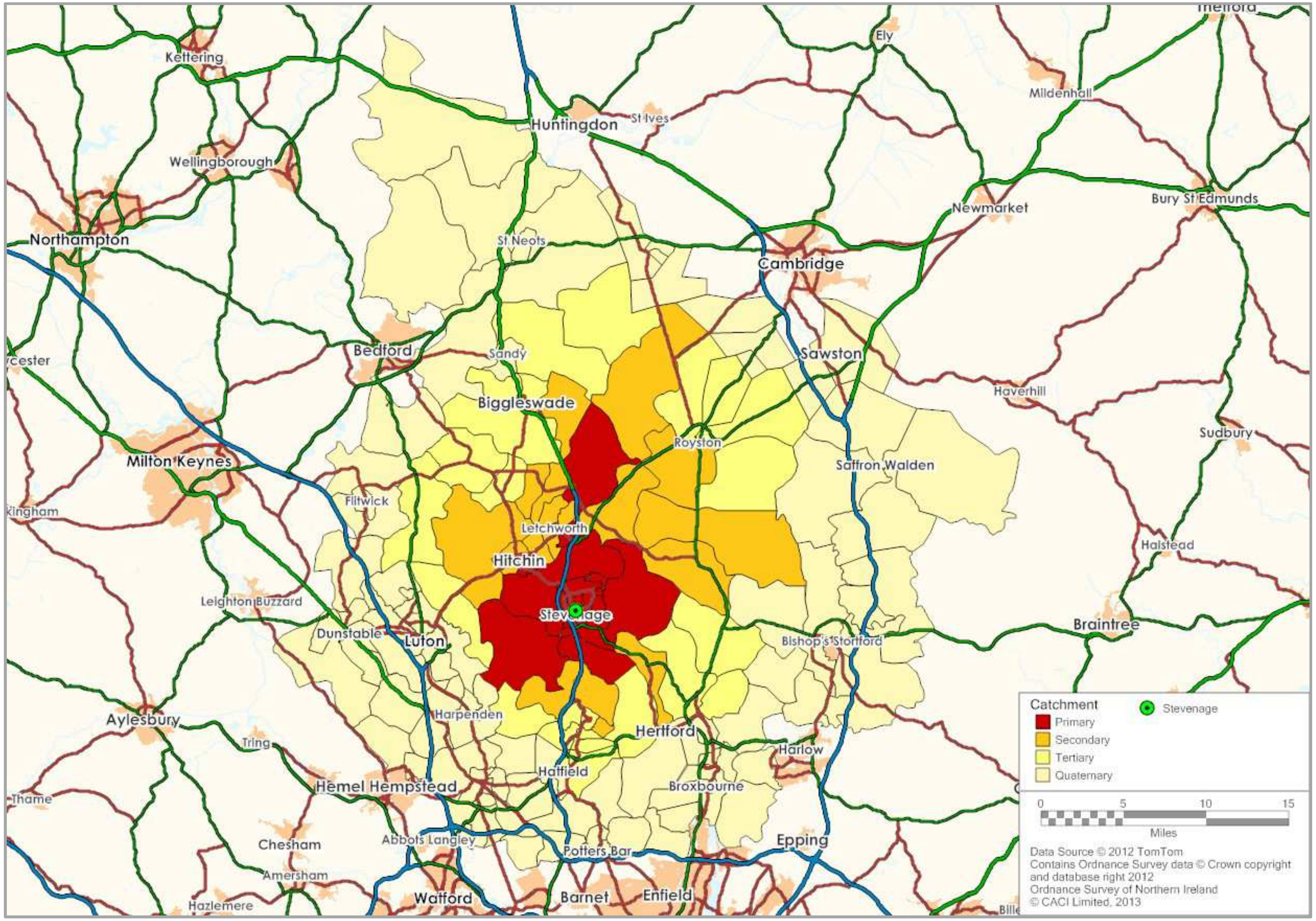
The map shows the percentage points change in market share across the Stevenage catchment once the three pipeline schemes have come online. There is minimal change to the catchment extent or the market shares that Stevenage captures.

8. Future Scenario Modelling

8.3 2017: Improve the Stevenage Retail Mix

2012 Catchment Map

Stevenage's catchment covers a large area of Hertfordshire



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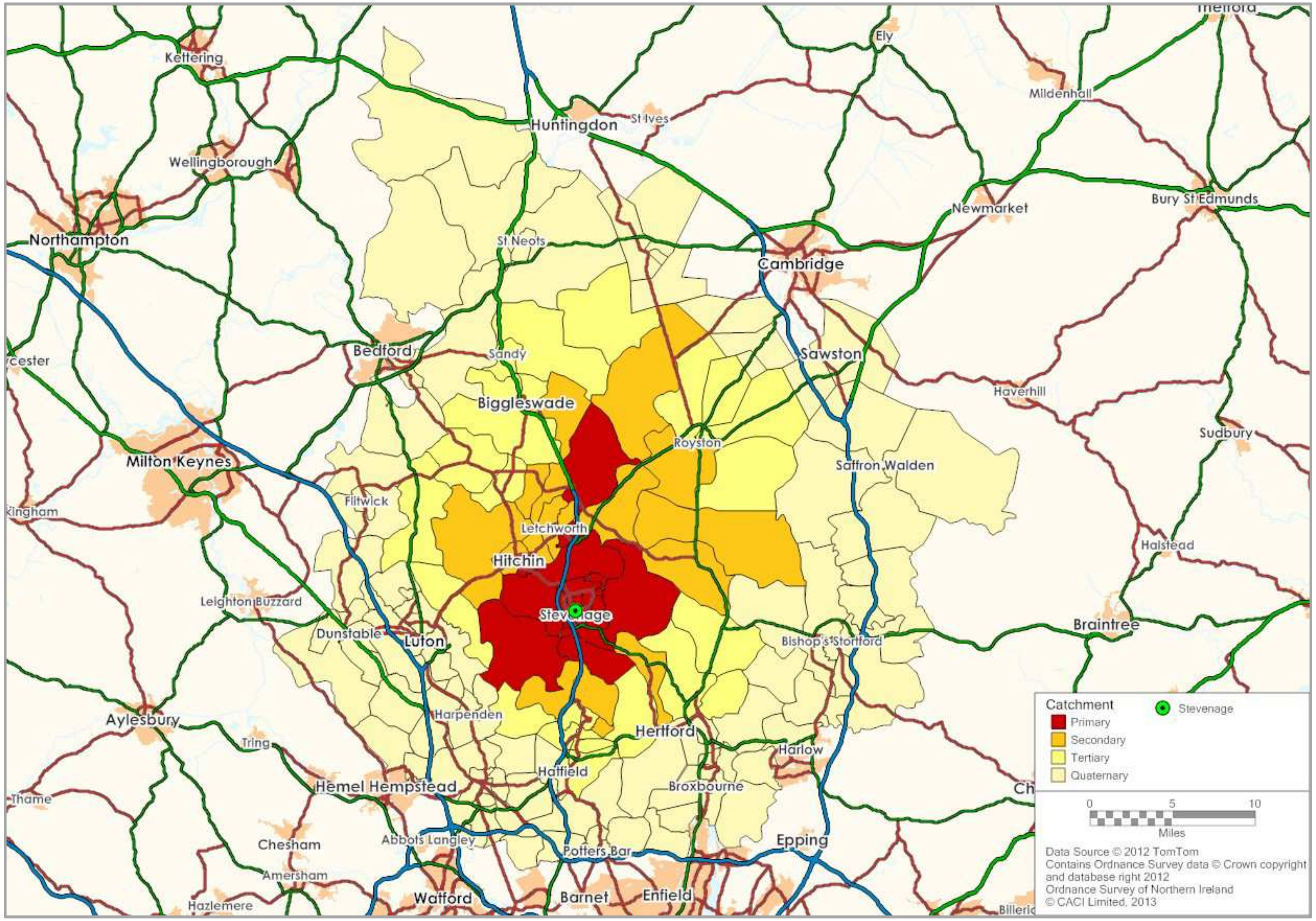
An improved retail offer will increase the catchment slightly to the north



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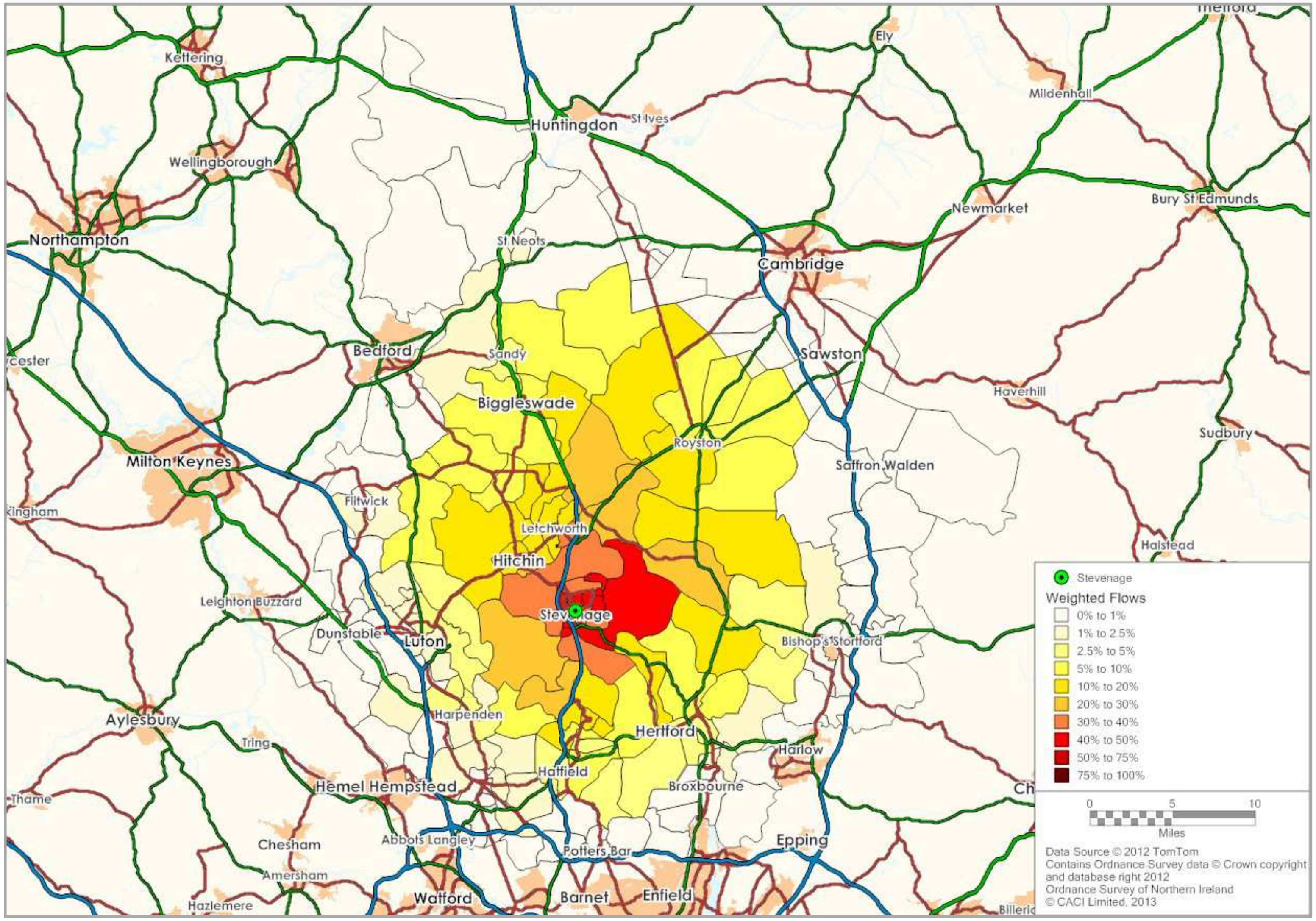
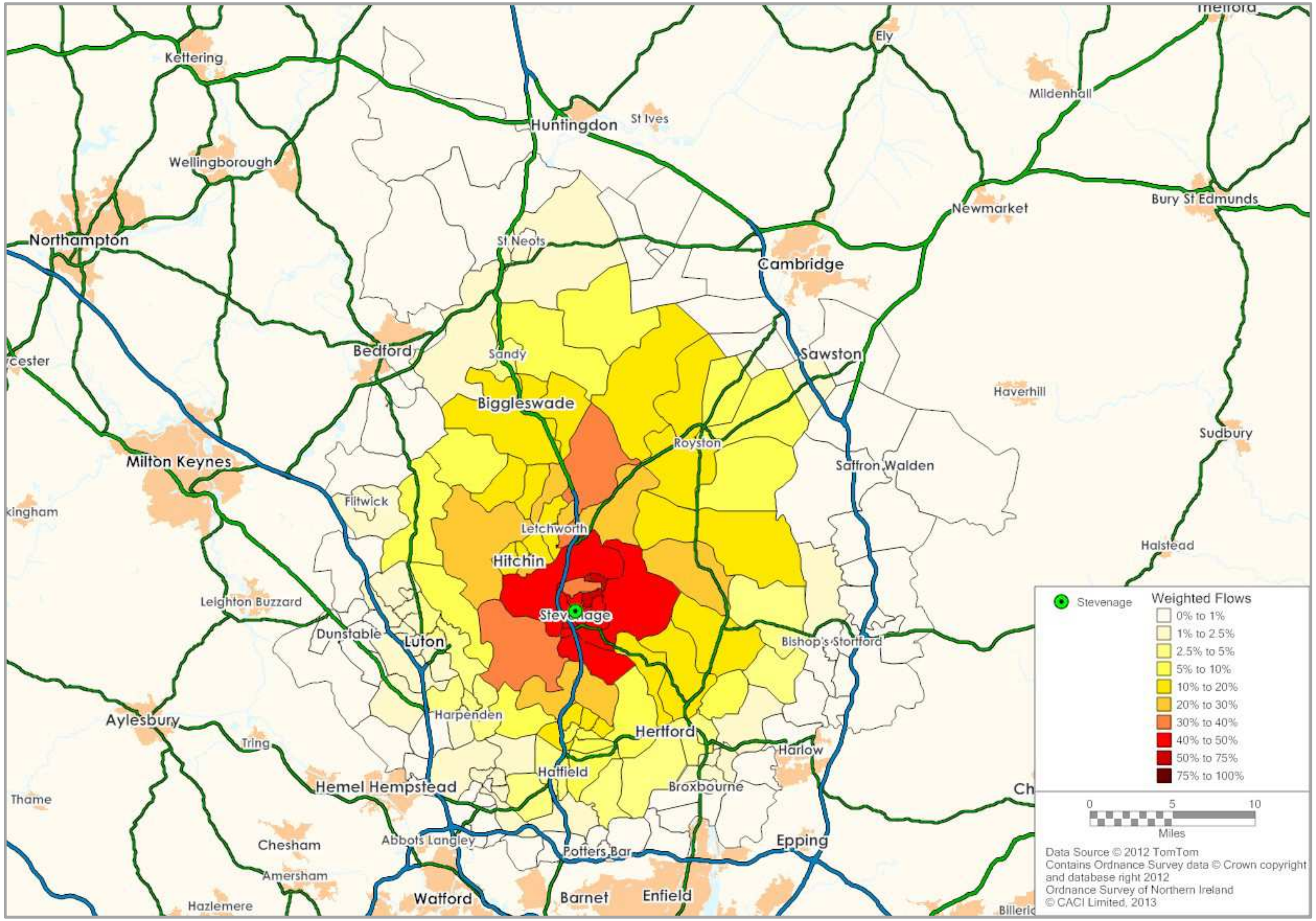
2012 Market Shares Map

High market shares in Stevenage indicating the strong local draw of the centre



2017 Market Shares Map: Improved Retail Offer in Stevenage

Market shares increase in the core catchment and to the west and north



2017 Catchment Summary Table

Stevenage has a Comparison Goods Market Potential of £213.9 million

Catchment	Total Population	Total Comparison Goods Expenditure by Residents (£m)	Shopper Population	Comparison Goods Market Potential (£m)	Market Share (%)
Primary	130,103	£281.3	51,442	£111.4	39.6%
Secondary	142,010	£298.5	24,032	£50.4	16.9%
Core Catchment	**272,113**	**£579.8**	**75,474**	**£161.9**	**27.9%**
Tertiary	195,209	£412.4	14,503	£30.7	7.4%
Quaternary	840,590	£1,761.7	10,168	£21.3	1.2%
Total Catchment	**1,307,912**	**£2,753.9**	**100,146**	**£213.9**	**7.8%**

- The above table shows the population and Comparison Goods expenditure across the Stevenage catchment. The total catchment contains over 1.3 million people with total annual Comparison Goods expenditure of over £2.7 billion. Stevenage is expected to capture 7.8% of this expenditure resulting in a Comparison Goods market potential of £213.9 million. The average market share for a centre of Stevenage's class is 9.6% so the centre is capturing less spend from its catchment than other similar centres. This is likely as much a function of competition as it is quality of offer in the centre.
- Market shares are highest in the primary catchment where Stevenage is expected to capture 39.6% of the £281.3 million available, equating to a market potential of £111.4 million. This 39.6% market share is less than the class average of 43.6%, again reflecting the levels of competition in the catchment area.
- The secondary catchment contributes a further £50.4 million in market potential capturing a 16.9% market share. The tertiary and quaternary catchments contain less frequent shoppers and as such market shares are lower, 7.4% and 1.2% respectively. These catchment areas contribute a further £30.7 million and £21.3 million in market potential.

2017 Category Expenditure Table

Average household Comparison Goods spend for all categories is above the East of England average

Category	Expenditure per Annum (£m)	Annual Household Spend (£)	Household Spend Index v UK	Household Spend Index v East of England
Residential Spend				
Clothing & Footwear	£60.0	£1,291.2	101	104
House & Home	£10.1	£218.3	113	103
Leisure Goods	£45.6	£979.7	112	107
Personal Goods	£12.1	£260.9	99	106
Personal Care	£28.0	£602.3	107	104
Durable Goods	£78.2	£1,681.9	118	105
Comparison Goods	**£234.1**	**£5,034.2**	**110**	**105**
Convenience	£201.3	£4,330.6	99	101
Catering	£65.9	£1,416.4	105	103
Total Retail Spend	**£501.3**	**£10,781.3**	**105**	**103**
Tourist Spend	**£3.0**		**N/A**	
Worker Spend	**£3.5**			

Source: Retail Footprint 2012

- Following the improvement in Stevenage's retail provision Comparison Goods market potential rises to £234.1 million, once Convenience and Catering are included this rises to £501.3 million.
- The average household spends are in line with that reported for 2012 when compared to the East of England and UK averages.

2017 Leakage

Stevenage still has the highest market share within its Core catchment and Total catchment

Retail Footprint Centre	Retail Footprint Class	RF Score	Distance (Miles)	Market Share (Core)	Market Share (Total)
Stevenage	**Mall-Dominated Town Centres**	**840**	**0.0**	**30.3%**	**8.3%**
Luton	Lower Average Centres	881	9.3	1.8%	7.2%
St Albans	Premium Centres	874	11.9	1.5%	5.1%
Milton Keynes	Town Centre Malls	1,350	25.6	1.0%	5.0%
West End	International Centres	6,812	27.0	6.0%	4.6%
Cambridge	Quality Regional Centres	1,548	25.0	1.7%	4.3%
Bishop's Stortford	Value Metropolitan Towns	612	15.7	0.4%	3.5%
Welwyn Garden City	Quality Metropolitan Towns	608	7.0	3.7%	2.8%
Harlow	Mall-Dominated Town Centres	689	15.7	0.7%	2.7%
Hatfield - The Galleria Outlet Centre	Major FOCs Mass Market	336	9.9	2.5%	2.7%
Hitchin	Value Metropolitan Towns	480	4.5	9.4%	2.6%
Brent Cross	London Regional Malls	937	22.6	1.1%	2.4%
Stevenage - Roaring Meg Retail Park	Shopping Parks	235	0.7	8.7%	2.4%
Dunstable	Value Metropolitan Towns	350	13.7	0.0%	2.3%
Covent Garden	Larger London Non-Residential Centres	1,493	27.1	3.7%	2.1%
Bedford	Lower Average Centres	770	19.8	0.3%	2.0%
Luton - Hatters Way Retail Park	Large Bulky Goods Retail Parks	162	10.8	0.1%	2.0%
Hemel Hempstead	Lower Average Centres	929	15.6	0.1%	1.9%
Westfield Stratford City	London Regional Malls	1,428	26.2	1.8%	1.9%
Letchworth	Value Metropolitan Towns	274	5.4	6.6%	1.5%
Dunstable - Luton Road	Large Bulky Goods Retail Parks	170	13.2	0.0%	1.4%

Source: Retail Footprint 2012

- The adjacent table shows Stevenage’s main competitors in terms of the market share they achieve within its Total Catchment once the improvement to the town’s retail provision is completed.
- Stevenage achieves an increased 30.3% market share of its Core catchment (where 75% of Stevenage’s trade originates) and the town’s market share of its Total Catchment also increases to 8.3%.
- Within the Total catchment Luton remains the main competitor drawing 7.2% of the share from Stevenage’s catchment.
- Within the Core Catchment of Stevenage the main competing destinations are still Hitchin (9.3%) and Roaring Meg Retail Park (8.7%).

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2017 Residential Retail Footprint Ranking

Stevenage rises to 85th out of over 4,000 Retail Footprint Centres (+13 places)

Rank	Centre Name	RF Minor Class	RF Score	Comparison Goods Market Potential (£m)		
				Residential	Tourist	Worker
75	Grimsby	Lower Average Centres	1,032	£256.0	£22.4	£5.7
76	Leeds - White Rose	Small Regional Malls	643	£255.2	£2.9	£0.2
77	Blackpool	Average Regional Centres	1,258	£254.6	£64.4	£7.7
78	Harrogate	Quality Regional Centres	1,252	£253.6	£80.7	£6.1
79	Leamington Spa	Premium Centres	1,022	£246.8	£24.9	£7.0
80	Taunton	Average Centres	937	£243.7	£46.0	£6.5
81	Bracknell	Average Centres	1,113	£242.2	£2.4	£5.9
82	Walsall	Medium Conurbation Towns	848	£241.3	£1.0	£8.1
83	Portsmouth - Gunwharf Quays	Major Urban FOCs Premium	605	£239.5	£95.9	£0.8
84	Bury St Edmunds	Quality Centres	880	£237.4	£42.3	£7.1
85	**Stevenage**	**Mall-Dominated Town Centres**	**840**	**£234.1**	**£3.0**	**£3.5**
86	Chichester	Premium Centres	1,004	£232.8	£40.1	£11.5
87	Canterbury	Premium Centres	1,185	£227.8	£115.0	£7.9
88	Stockport	Medium Conurbation Towns	880	£225.4	£0.9	£8.4
89	Lancaster	Average Centres	992	£225.3	£16.5	£7.3
90	Darlington	Lower Average Centres	1,000	£224.7	£6.4	£8.6
91	Hereford	Average Centres	970	£224.2	£40.7	£6.4
92	Telford	Mall-Dominated Town Centres	807	£224.2	£22.4	£2.4
93	High Wycombe	Quality Centres	945	£224.1	£8.8	£7.2
94	Bolton	Medium Conurbation Towns	971	£222.0	£21.2	£7.2
95	Shrewsbury	Premium Centres	1,135	£221.2	£24.3	£4.9

Source: Retail Footprint 2012

- Stevenage post improvement is expected to rank 85th out of over 4,000 Retail Footprint centres based on Residential Comparison Goods market potential.
- It sits just above Chichester and Canterbury (both classed as Premium Centres) and just below Bury St Edmunds (Quality Centre).
- This rise means that Stevenage has improved its market shares within the catchment without extending its catchment further. This provides a market opportunity for mass market brands not currently in Stevenage to captalise on the potential within the catchment.

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2017 East of England Retail Footprint Ranking

Stevenage is now the 10th largest centre in the East of England (+1 place)

Rank	Centre Name	RF Minor Class	RF Score	Comparison Goods Market Potential (£m)		
				Residential	Tourist	Worker
1	Norwich	Principal Centres	2,154	£806.5	£113.5	£18.3
2	Thurrock Lakeside	Outer London Regional Malls	1,138	£510.3	£21.3	£1.3
3	Colchester	Quality Regional Centres	1,346	£459.7	£66.7	£9.0
4	Cambridge	Quality Regional Centres	1,548	£458.4	£160.8	£13.8
5	Watford	Quality London Conurbation Towns	1,237	£408.0	£12.3	£16.9
6	Ipswich	Average Regional Centres	1,292	£396.0	£41.8	£16.5
7	Peterborough	Quality Regional Centres	1,210	£336.7	£20.5	£13.8
8	Chelmsford	Quality Centres	1,033	£273.0	£24.2	£21.1
9	Bury St Edmunds	Quality Centres	880	£237.4	£42.3	£7.1
10	**Stevenage**	**Mall-Dominated Town Centres**	**840**	**£234.1**	**£3.0**	**£3.5**
11	Basildon	Mall-Dominated Town Centres	893	£217.7	£1.4	£3.9
12	Luton	Lower Average Centres	881	£211.4	£4.3	£14.3
13	Southend-on-Sea	Lower Average Centres	882	£198.7	£46.5	£7.5
14	Bedford	Lower Average Centres	770	£198.6	£15.3	£7.5
15	Braintree Designer Outlet Centre	Major FOCs Premium Brands	417	£197.9	£4.6	£0.1
16	St Albans	Premium Centres	874	£182.1	£42.5	£8.3
17	Harlow	Mall-Dominated Town Centres	689	£172.6	£1.0	£2.6
18	Hemel Hempstead	Lower Average Centres	929	£155.0	£2.7	£4.6
19	Cambridge - Cambridge RP	Shopping Parks	462	£142.7	£0.1	£0.9
20	King's Lynn	Lower Average Centres	843	£137.7	£49.3	£5.5

Source: Retail Footprint 2012

- Stevenage is predicted to become the 10th largest RF centre out of 365 centres in the East of England.

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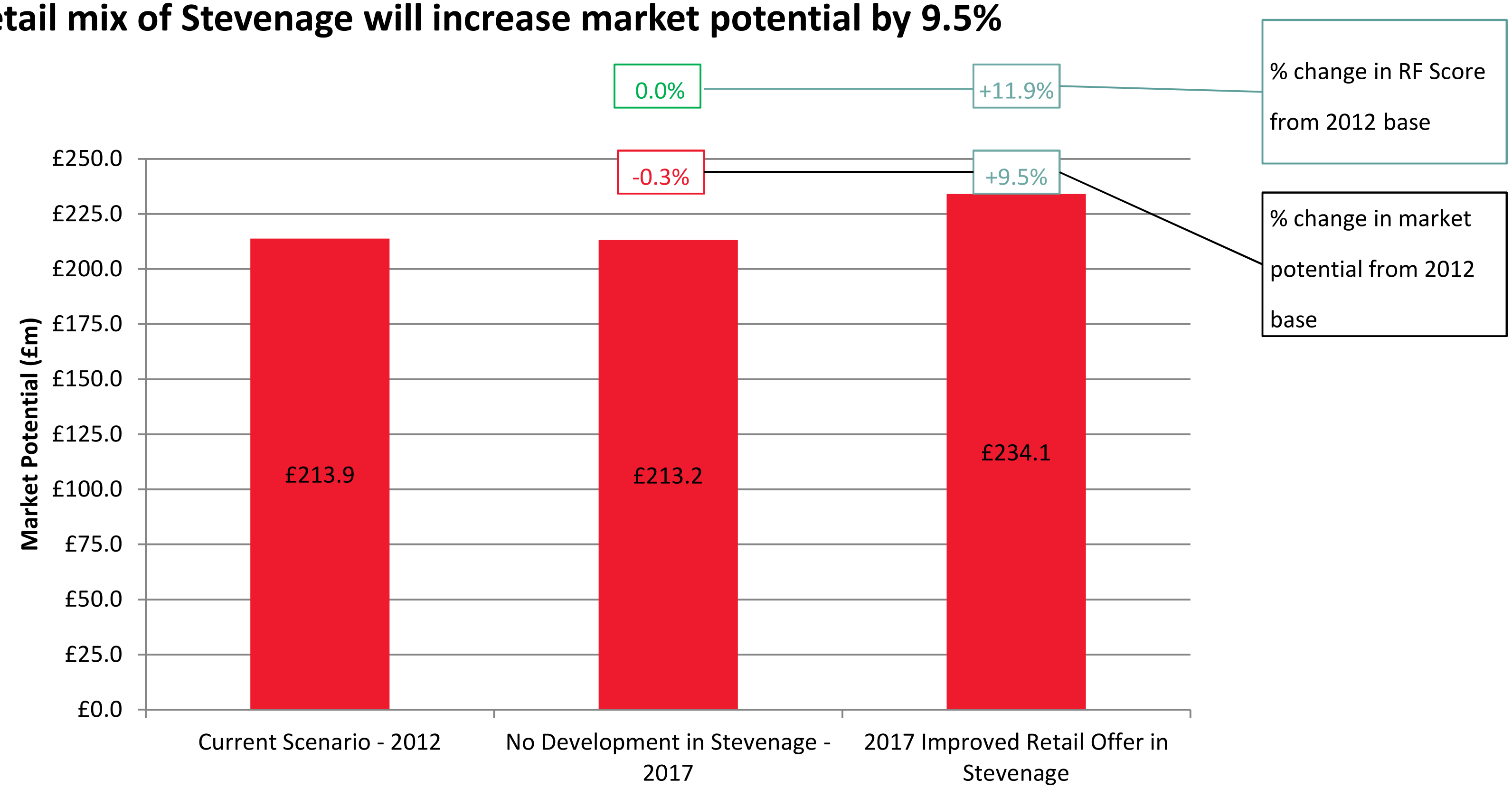
Scenario Uplift Summary

Improving the retail mix of Stevenage will increase market potential by 9.5%



- If the retail offer of Stevenage does not change come 2017 then the market potential of the centre will decline by 0.3% to £213.2 million. This is on the assumption that the retail provision in Stevenage remains at current levels.
- If the centre improves the retail mix by adding around 10 multiple stores in place of independents the market potential will increase by 9.5% to £234.1 million. This is a big increase considering no new space is being added and it is assuming reconfiguration/redevelopment of existing sub standard space. This also assumes that the other schemes come online, without these schemes the uplift would be 9.8%.
- Improving the retail mix will make the centre more attractive to some of the middle income and affluent shopper groups who are currently choosing not to shop in Stevenage.

Benchmark Centres - Aspirational

Aspirational benchmarks in the same class as Stevenage include Crawley and Basingstoke

- CACI have selected a set of aspirational benchmarks for Stevenage. These are centres in the same Retail Footprint class, with similar demographic profiles but with a bigger catchment in terms of Comparison Goods market potential.
- With the improved retail mix at Stevenage, its market potential increases to £234.1million. This is now within 20% of Basingstoke's Comparison Goods market potential.
- CACI would class an appropriate benchmark centre to be within a market potential of +/- 25%.

Scenario Conclusions

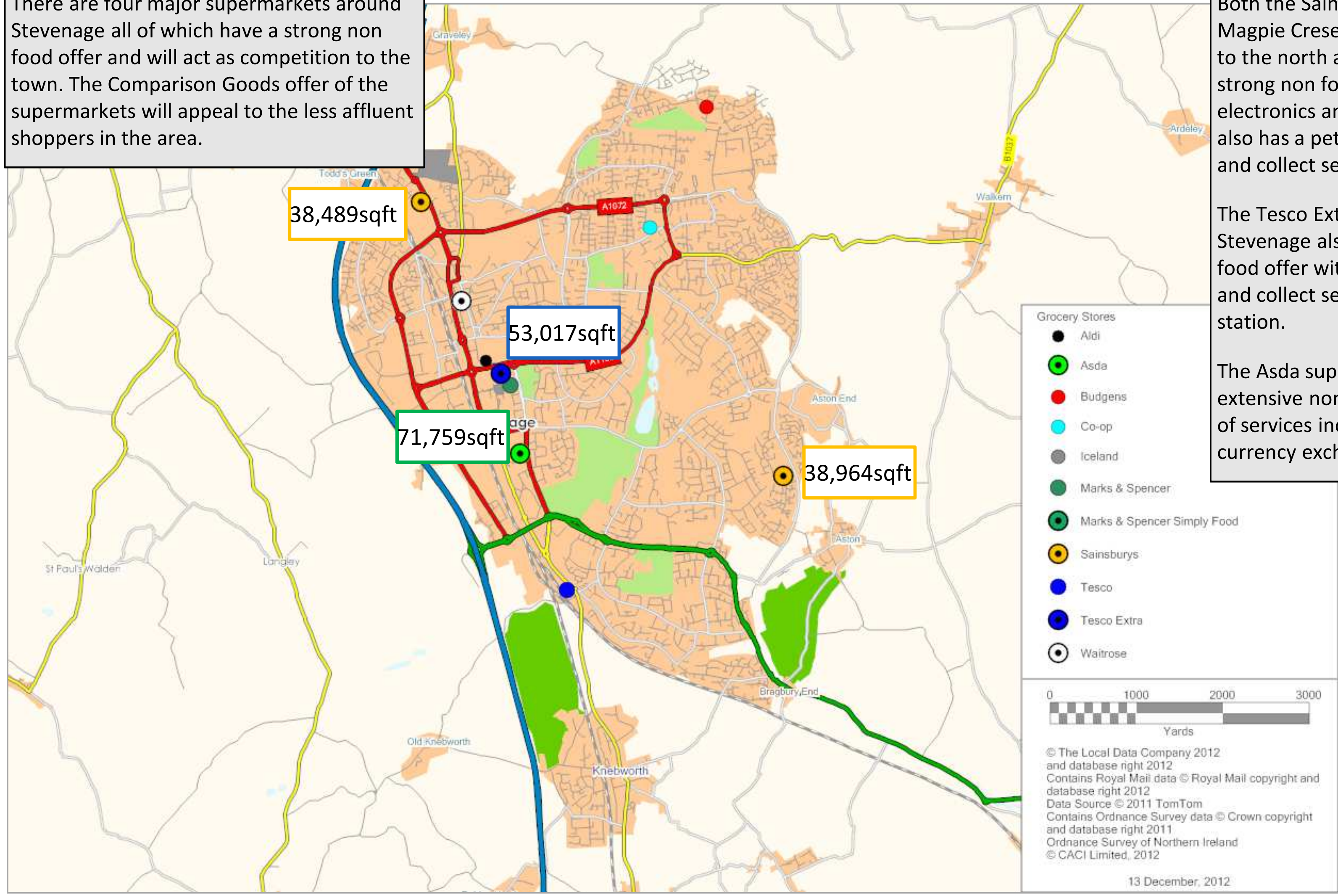
- Stevenage, despite having relatively low vacancy rates, is suffering from a number of impacts to its town centre. These include:
    - On-going economic situation – the economic situation has impacted on consumer spending levels – resulting in a number of retail administrations. Pre pack or administrative closures are more likely at poor performing stores and these are less likely to be found in thriving retail centres.
    - Quality of shopping environment – Stevenage town centre requires rejuvenation and a recognition that the public realm and shopping environment is not aligned to the expectations a modern day shopper. This includes the quality of some of the peripheral car parks which are often the first impression of the town centre. It is suggested these are reviewed in terms of space provision (particularly for family groups) and pricing policy. It is also critical that the council considers budget for on-going maintenance of the environment.
    - Retail offer – The retail offer of Stevenage town centre is aligned to some of the less affluent groups within the primary and secondary catchment. Those mass retailers that may have traditionally taken space in the town centre haven't because the retail stock is not sufficient or they have taken space on an adjacent retail park where the consumers can park for free.
- Unless these issues are addressed Stevenage Town Centre will continue to stagnate at best and decline at worst to remain a value driven centre that is not really capitalising on the opportunity within its own catchment. The environment and offer will not be conducive to attracting those affluent demographic groups that live within the catchment, as they are not currently considering Stevenage centre as a viable shopping proposition.
- The benefits of improving the shopping environment and some relatively small changes to the retail mix will enable Stevenage to develop its offer and through appropriate targeting of underperforming groups and neighbourhoods will help drive the success of the centre.
- The scenario CACI have identified, where a few key retailers are introduced, would raise Stevenage's national ranking by 13 places and increase market potential by 9.5%.
- If there is no change in Stevenage, particularly around the quality of the retail environment, coupled with increased floorspace provision outside the centre in competing destinations, it will render floorspace in secondary and tertiary areas within the town redundant. This will result in a decline in the market potential that at best could be -0.3%.

9. Grocery Provision

Stevenage Grocery Offer

There are four large supermarkets in and around Stevenage with a strong Comparison Goods offer

There are four major supermarkets around Stevenage all of which have a strong non food offer and will act as competition to the town. The Comparison Goods offer of the supermarkets will appeal to the less affluent shoppers in the area.



Both the Sainsburys to the east on Magpie Cresence and the Sainsburys to the north at Coreys Mill have a strong non food offer – homewares, electronics and TU Clothing range, it also has a petrol station and click and collect service.

The Tesco Extra in the middle of Stevenage also has a strong non food offer with a clothing range, click and collect service and a petrol station.

The Asda supercentre has an extensive non food offer and a range of services including opticians and currency exchange.

10. Conclusions & Recommendations

Conclusions

Stevenage is successfully attracting local less affluent shoppers on a frequent basis but has an affluent catchment that are currently not shopping at the centre. In order to evolve, Stevenage needs to tailor its retail mix towards a more mass and upper market offering aimed at the Secure Families ACORN group, which will result in an uplift for the town. Along with an improved retail mix, the negative perceptions of the town need to be addressed through parking initiatives, tidying up the town centre and addressing anti-social behavior to make it a more appealing destination to these affluent families living in the secondary and tertiary catchments.

Retail Footprint Catchment Statistics	Stevenage serves its local market well, attracting a 27.9% share of its core catchment. Stevenage has a Comparison Goods market potential across its total catchment of £213.9 million, equating to a market share of 7.8%. Stevenage has an affluent catchment, with household spend on Comparison Goods 10% above the UK average. The key competitors for Stevenage within the core catchment include Hitchin and Roaring Meg. In the total catchment the main competitors for Stevenage are Luton and St Albans. Stevenage is dominant by value retailers which is making it more attractive to the less affluent shopper, which is evident in the survey analysis.
Demographics	The Stevenage has an affluent and family focused Retail Footprint catchment containing 14% Wealthy Executives, 8% Flourishing Families, 10% Starting Out and 14% Secure Families. These affluent shoppers in the catchment are currently shopping elsewhere as the offer of Stevenage town centre doesn't appeal and the marketing positioning of competing centres is more premium. In the survey analysis the shopper profile is dominated by the less affluent ACORN groups Post Industrial Families (22%) and Struggling Families (17%). The proportion of the affluent groups within the survey is less than Retail Footprint would expect (Wealthy Executives 7%, Flourishing Families 3% and Secure Families 7%). It is not realistic to expect to attract the most affluent shoppers, instead the focus should be on improving the mass and upper mass market offer to try and attract more Secure Families, who are present in the catchment but are not currently shopping at Stevenage.
Survey Analysis	Compared to what Retail Footprint would expect Stevenage is attracting a greater proportion for respondents from the primary catchment, indicating the strong local draw of the centre. The Stevenage town centre survey demonstrates that shoppers are visiting frequently (70% at least once a week), for non- grocery and grocery shopping. This is highlighted with Tesco Extra and Primark being the most visited stores. Respondents rated Stevenage highly for personal safety but low for cost of parking, choice of shops and atmosphere. In order to visit Stevenage more frequently shoppers requested improved quality of shops and more shops in general. Those respondents in the different survey locations rated Stevenage poorly for atmosphere and cost of parking.
Benchmarking	CACI have selected benchmarks for Stevenage as it is today. All benchmark centres are the same Retail Footprint class as Stevenage (Mall Dominated Town). The current benchmark centres include Telford, Harlow, Woking and Basildon and have an ACORN correlation greater than 0.7 (where 1 is a perfect fit), a Comparison Goods Market Potential within 25% of Stevenage. Compared to these benchmarks Stevenage has the second highest proportion of value retail (40%). The aspirational benchmarks include Crawley and Basingstoke. Gap analysis has been carried out by assessing the presence of brands in benchmark centres that are not currently trading in Stevenage. H&M and Monsoon were present in all benchmark centres.
Future Scenarios	There were two future scenarios for Stevenage modelled in 2017. The first scenario saw no change in Stevenage to understand the impact of competing schemes. This resulted in a minimum of a 0.3% drop in Comparison Goods market potential for Stevenage. The second scenario saw an improved retail mix in Stevenage, by adding 10 multiple retailers in place of independent units. This scenario results in a 9.5% uplift for the Comparison Goods market potential of Stevenage.

Recommendations

- Improving the retail offer
    - The focus should be on attracting into the town centre Secure Families (ACORN Group), as they are present within the catchment but are currently not regularly shopping at Stevenage.
    - The retail mix would need to include more mass market multiples in order to attract these Secure Families. The increase in mass market retailers would not put off the less affluent core shopper groups (Post Industrial Families & Struggling Families) ,which is important as these represent a significant proportion of the catchment.
    - For this to happen there would need to be some investment in order to develop units that would be more suitable for modern retailers along the lines of those identified in the scenario.
    - Alongside this there needs to be improvements and investment in the public realm and the shopping environment to bring Stevenage up to expectations for retailing today.
    - Stevenage should not focus on attracting the most affluent ACORN groups, as it would require a significant increase in premium and mass retail which would potentially alienate its core shoppers from the less affluent ACORN Groups. As a town it needs to continue to play on its strengths in attracting the less affluent ACORN groups in the core catchment who are valuable shoppers.
    - Improvement should be made to other aspects of the shopping experience, notably the quality of the parking provision.
- Drive dwell and catering spend
    - The research concludes that the relaxation of some of the planning uses within the town centre and encouragement of more quality recognised coffee brands into suitable units will help with the shopper experience and lead to increased dwell and spend.
    - There is also the potential to increase the dwell time in Stevenage Town Centre through increased catering in the form of seasonal pop up stalls. This would help to improve the atmosphere within the town and potentially may encourage retailers to open longer in the town centre.

CACI

Recommendations

- Focus targeting key battlegrounds
  - Currently Stevenage is attracting a significant proportion of shoppers from its primary catchment, more so than CACI's Retail Footprint model would expect.
  - The focus needs to be on attracting more shoppers from the secondary and tertiary catchments, in the key battle ground areas around Hitchin, Biggleswade and Royston. This could be through a combination of direct mail and targeted outdoor advertising where budget allows.
- Drive perception amongst potential investors and tenants
  - Stevenage is currently a top 100 town in the UK with some solid demographics and an opportunity to rise up the rankings with a relatively small step change in retail offer – the challenge is how to demonstrate to a potential retailer what the vision for the town is.
  - This would be achieved by creating an investor pack (or market summary) in conjunction with a more focused report to specific tenants outlining the benefits of the town in relation to the specific retailers demographic.

Appendix

1. Retail ACORN Slides

Group M: Blue-Collar Roots

Key Catering

Burger King
Beefeater Grill

Key Retail

Matalan
The Fragrance Shop
The Entertainer
evans
ASDA

Readership

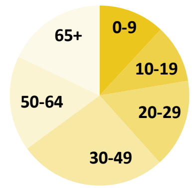
Mirror
The Sun
People

Lifestyle

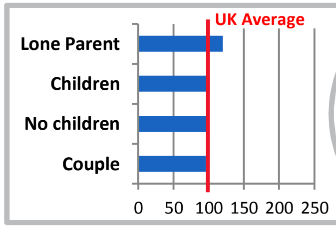
Angling Trust
Auto Trader
Virgin media
Ladbrokes

- These are communities where most employment is in traditional **blue-collar occupations** in factory and other manual roles. Families and retired people predominate with some young singles and single parents. Most properties are **terraced houses** with two or three bedrooms, and house prices are below average. Levels of educational qualifications tend to be low. Levels of **unemployment have risen faster than average**, as has the proportion of income derived from benefits. There are **pockets of deprivation** in this group.

- **Spending** on clothing is **being cut back**, and is usually bought from supermarkets. Consumers in this type use the internet, although not extensively for making purchases. The **tabloid press** is favoured reading and interests include angling, computer games, bingo, gambling, football as well as **watching TV** and **going to the pub**.



Age



Family Type

Average Income:
£30,600

Average House Price:
£118,000

Household

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Group N: Struggling Families

Key Catering

Pizza Hut
KFC

Key Retail

MATALAN
Superdrug
PRIMARK
Poundland
Argos
BrightHouse Your Weekly Payment Store

Readership

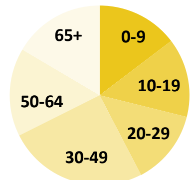
Mirror
Daily Star
The Sun

Lifestyle

Mecca Bingo
lotto
Ladbrokes

- These are **poor families in low-rise estates**. The housing tends to be small, overcrowded and is generally **rented from the council or a housing association**. On some estates there are high numbers of **single parents**, while on others there are more **elderly people**. Incomes are low and long-term unemployment high. When there is paid work, it is usually in factories, shops and other manual occupations, reflecting the **lack of educational qualifications**.

- Since **money is tight**, shopping tends to focus on cheaper stores and catalogues. **Travel is on foot** or by public transport since few own a car. Visiting the pub, **betting**, football pools, **bingo** and the Lottery are the principal leisure activities. These hard-pressed families are **struggling to get by** in an otherwise affluent Britain.



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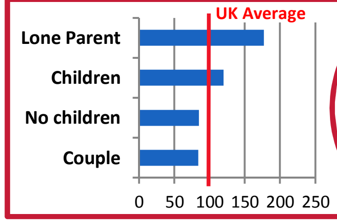

Family Type

Average Income:
£25,700

Average House Price:
£119,000

Household

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Appendix

2. Survey Analysis

ACORN Profile

Category	Group		Hitchin Survey Profile %	Letchworth Survey Profile %	Roaring Meg Survey Profile %	Old Town Survey Profile %	Stevenage Town Centre Survey Profile %
1	A	Wealthy Executives	13%	14%	10%	15%	7%
	B	Affluent Greys	0%	9%	2%	3%	2%
	C	Flourishing Families	16%	5%	10%	9%	3%
2	D	Prosperous Professionals	2%	0%	2%	2%	1%
	E	Educated Urbanites	5%	5%	7%	3%	6%
	F	Aspiring Singles	1%	0%	2%	4%	4%
3	G	Starting Out	9%	8%	3%	6%	6%
	H	Secure Families	21%	20%	17%	12%	7%
	I	Settled Suburbia	6%	2%	0%	0%	1%
	J	Prudent Pensioners	3%	3%	1%	3%	4%
4	K	Asian Communities	1%	0%	0%	0%	0%
	L	Post Industrial Families	8%	6%	19%	16%	22%
	M	Blue-Collar Roots	2%	6%	12%	2%	13%
5	N	Struggling Families	10%	15%	12%	21%	17%
	O	Burdened Singles	0%	6%	2%	3%	5%
	P	High Rise Hardship	0%	3%	2%	2%	4%
	Q	Inner City Adversity	1%	0%	0%	0%	0%