Carter Jonas

Babergh & Mid Suffolk District Councils:

Joint Town Centres & Retail Study

FINAL REPORT

September 2015

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6.0 HADLEIGH TOWN CENTRE: HEALTH CHECK

6.1 Hadleigh is the second largest town in Babergh District, after Sudbury. The centre provides an important role as an employment and a local service centre for the surrounding settlements in the area. It offers an attractive, compact shopping area, with a range of (mostly independent) retailers and a strong historic character. The River Brett runs to the west of the centre and provides an attractive backdrop; although links from this green walkway into the centre could be improved.

6.2 Hadleigh town centre has a relatively up-market offer, including a majority of independent and locally owned stores. The centre serves daily 'top-up' needs, with larger stores occupied by antique dealers and independently owned department type stores. It is not however covered by Javelin Venuescore's ranking of centres.

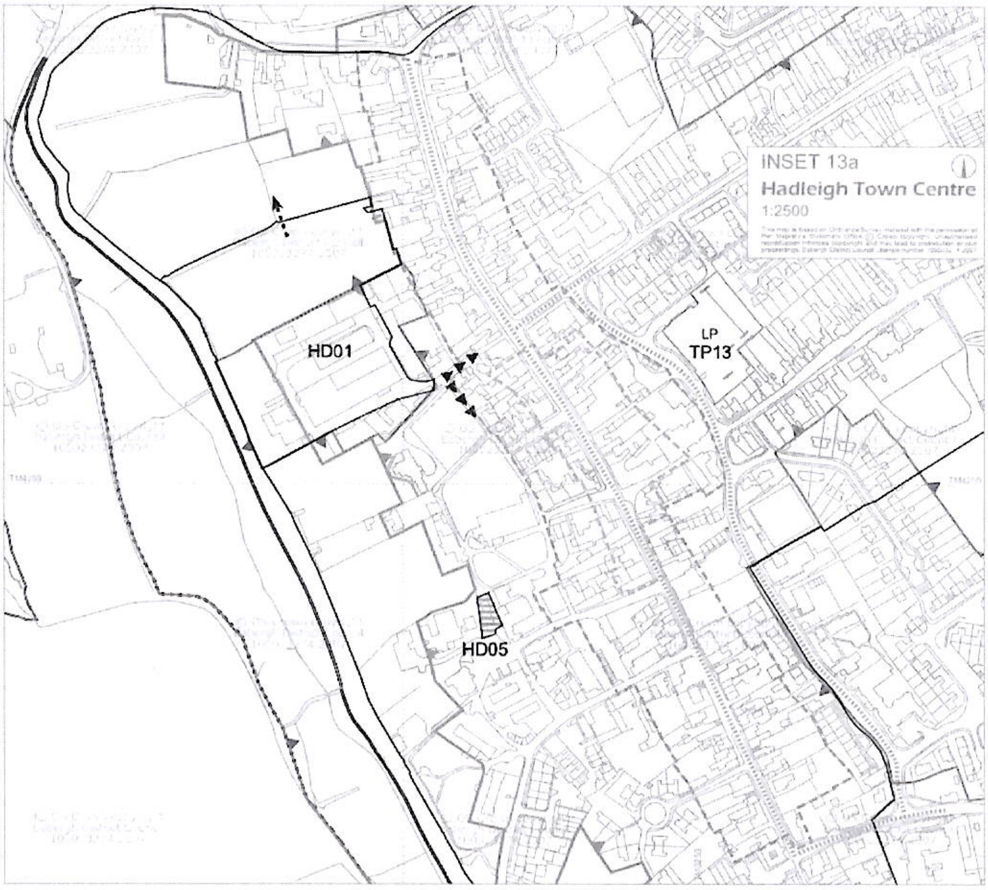
6.3 Hadleigh has a twice weekly market, but it is relatively small and limited in its offering, generally restricted to food goods. There could therefore be potential to expand this market and widen its appeal, as Stowmarket and Sudbury have both successfully done.

6.4 The centre faces strong competition from Tesco Extra at Copdock Interchange and Copdock Mill Retail Park, which are located on the periphery of Ipswich's urban area but within Babergh District,. The out-of-centre shopping facilities, along with the attraction of Ipswich Town Centre and other high order centres, has dampened the requirement for new comparison goods floorspace in the District and Hadleigh. In addition, listed buildings and the conservation area within the centre places limitations on the scale of any future development.

6.5 The Town Centre's retail provision is focussed on a linear High Street, with traditional shop frontages and small units throughout the main shopping area. Retail units are also located on the smaller streets leading into the High Street; including Church Street, George Street, Maiden Way and Market Place. A cluster of larger buildings, including the Town Hall and White Lion Hotel (now converted to residential) are located at the junction between High Street and Market Place. At either end of High Street, residential uses become increasingly interspersed with retail uses and the frontage becomes less defined.

6.6 A map of the Town Centre boundary is set out in Figure **6-1** below. The Primary Shopping Area (PSA) along High Street is identified by a blue dotted line and the town centre boundary is indicated with a grey dotted line.

Figure 6-1 **Hadleigh Town Centre**



Source: Babergh Local Plan 2006

RETAIL COMPOSITION AND DIVERSITY

6.7 The assessment of the current retail and service provision in Hadleigh (measured by outlets and floorspace) has been informed by the latest Experian Goad Town Centre Category Report (**Appendix 6**)[23]. This has also been supplemented by the Council's own detailed Town Centre audit and our site visits in 2015.

6.8 The table below shows the distribution of retail units and floorspace, benchmarked against the national average for all centres and shopping locations surveyed by Experian Goad.

[23] It should be noted that Experian Goad's definition of the town centre boundary used for the purpose of their surveys and reports may differ from other definitions including, for example, the boundary identified by the local planning authority in the Local Plan Proposals Map.

Table 6.1 Hadleigh: Retail Composition by Units and Floorspace, 2013

Category	Units			Floorspace		
	Units	% of total	UK average %	Sq ft	% of total	UK average %
Comparison	16	25.4%	32.5%	24,100	28.6%	36.1%
Convenience	8	12.7%	8.4%	19,600	23.3%	15.0%
Total Service:	34	54.1%	47.4%	35900	42.6%	38.8%
Retail Service	11	17.5%	14.1%	7,300	8.7%	7.4%
Leisure service	12	19.1%	22.4%	13,100	15.5%	23.2%
Finance and business	11	17.5%	10.9%	15,500	18.4%	8.2%
Vacant	5	7.9%	11.4%	4,700	5.6%	9.3%
Total	**63**	**100.0%**	**100.0%**	**84,300**	**100.0%**	**100.0%**

Source: Experian Goad, August 2013

6.9 There are 63 units recorded to be in Hadleigh, compared with 258 units in Sudbury and 145 units in Stowmarket. The centre has a total Experian Goad floorspace of 7,832m^2 (84,300 sq ft), and is significantly smaller than Sudbury (47,845m^2 / 515,000 sq ft) and Stowmarket (26,868m^2 / 289,200 sq ft). The average size of units in Hadleigh of 124m^2 (1,340 sq ft) is also smaller than for Sudbury (185m^2 / c.2,000 sq ft) and Stowmarket (185m^2 / 1,995 sq ft).

6.10 Hadleigh has a relatively small representation of comparison units and floorspace, both of which are below the UK average (25.4% of units compared to a national average of 32.5%). Due to the relatively small size of the centre, the majority of main comparison goods categories are not represented in the town. Notable gaps include footwear, menswear and childrenswear. However, the site visit did identify a number of larger non-food stores such as the MW Partridge & Co. hardware store, which is a large and attractive store on the high street, and popular locally for its extensive range of stock.

6.11 Overall, convenience provision is above the UK average in Hadleigh (12.7% of units compared to 8.4% across the UK). The eight convenience stores include two bakers and confectioners, two butchers and two smaller convenience stores. In terms of supermarket provision, the centre is served by a Co-Operative food store on the High Street, in addition to a large Morrisons superstore located on the edge of the centre on Calais Street. Although convenience goods provision is above national averages, there may be scope to improve the quality and choice of food and convenience retailing in Hadleigh as a number of major grocers are not currently represented in the centre (including, for example, Waitrose and Sainsbury's). However, due to the size of the settlement, any additional provision is likely to take the form of smaller format food and convenience stores.

6.12 The representation of service retailers in Hadleigh Town Centre is above national average levels (54.1% of units compared to 47.4% across the UK). This category includes important local services that meet the needs of the surrounding rural population (such as, for example, a post office, launderers/dry cleaners and opticians). Provision also includes:

- Six Health and Beauty units, which is equivalent to 9.5% of total outlets and is above the national average of 8.6%.
- Leisure services including three fast food & takeaway units, four cafes, two restaurants, and three public houses. Although this represents a relatively good level of leisure provision for a centre of its size, there would appear to be some scope to extend the restaurant and bar provision in order to strengthen the attraction of the town's evening economy.

6.13 There are 11 finance and business services in the centre, which equates to 17.5% of total outlets in the town centre and is significantly above the UK average of 10.9%. This includes four property services and three retail banks, including Barclays and Lloyds.

6.14 Boots the Chemist is the only *'Major Retailer'* present in Hadleigh Town Centre, as defined by Goad, with two stores. The centre has a total of 14 total 'multiple' retailers, of which 14.3% are comparison retailers, significantly below the UK average of 42.9%. Across most categories the representation of major and national multiple retailers is below the UK average, with the exception of 'financial and business services', of which there are six multiples in the centre representing 42.9%, compared to the UK average of 16.2%. This reflects the Town Centre's role as an important local service centre.

6.15 Babergh District Council has carried out regular six monthly audits on Hadleigh Town Centre since 2010[24]. The audits show that the proportion of units across the different use classes has remained fairly consistent across the period. Notwithstanding this, the proportion of A1 uses has fallen over the period, whereas the proportion of A2 uses has increased.

VACANCY LEVELS

6.16 Vacancy levels provide one of the key performance indicators (KPIs) for assessing the relative health of centres, and measuring how their attraction and performance may be changing over time. In this case we have drawn on the vacancy levels shown in the Goad data. We have also drawn on the Council's more detailed Town Centre Audit in order to inform an analysis of vacancy 'hot spots' and also trends over time. As set

[24] It should be noted that the Council's audit identified a larger number of units within the Town Centre (113 in total) due to the different definitions of the centre boundary.

out in the assessment of Sudbury's vacancy rates, this data should be treated with caution as they can represent only the current status of units and do not reflect the ongoing changes within a centre.

6.17 The table below shows that there were five vacant units in the town centre in August 2013. This is equivalent to a vacancy level of 8.0%, which is below the national average for all centres recorded by Experian of 11.4%. The number of vacant outlets had increased by from 4 units in 2011 (according to the *2011 Retail Study Update*). These stable vacancy rates are significantly below national averages and indicate that Hadlegh is a viable Town Centre.

Table 6.2 Vacancy Rates in Hadleigh by Units and Floorspace

Vacant Units	% of Total Units	National Average (%)	Vacant Floorspace (m^2)	% of Total Floorspace	National Average (%)
5	7.9%	11.4%	4,700	5.6%	9.3%

Source: Experian Category August 2013.

6.18 The Council's Town Centre Audits gathered information on the number, type and location of vacant units in Sudbury Town Centre. As stated above, this data is not directly comparable to the Goad data as it is not based on the same geographically defined Town Centre area. However, it shows that since 2010, the number of vacant units in the town centre has fluctuated, reaching a low of four units in 2011 and peaking at nine units in May 2013, since when it has again fallen. The majority of the vacant units identified in the October 2014 survey were located on the High Street, with one on Market Place. Only two of the vacant units recorded by the Council's survey were along the primary shopping frontage, which is a further positive sign of the town centre's overall vitality and viability.

PRIME ZONE A RETAIL RENTS

6.19 The level of rent that businesses are prepared to pay for retail space in a centre provides a further indication of the relative strength of the centre and its prime retail pitch as a shopping location. The 2008 Retail Study found that prime retail rental values in the centre had decreased by 6% in the period from 2002 to 2008. Due to the small size of this centre and the limited transactions it has not been possible to identify current Prime Zone A rental levels for Hadleigh. However, market evidence from Stowmarket and Sudbury suggests that rental levels in the area generally have begun to stabilise, following a recent period of significant decline following the economic recession.

ACCESSIBILITY & PEDESTRIAN FLOWS

6.20 Hadleigh is accessed via the A1071, which bypasses the town. The spread of housing areas in the town mean that many of these now fall quite far from the centre. There are five Council-run car parks in Hadleigh, all of which are free of charge for up to three hours. Car parking is located in close proximity to the main shops, providing easy access to the centre. This is particularly important as there is no rail service into Hadleigh.

6.21 In terms of footfall the 2015 site visit generally confirmed the findings of the *2011 Retail Study Update*; namely that pedestrian flows are highest at the southern end of the High Street. However it should be noted that footfall typically falls during the lunch hour, as a number of the stores close during this time. Our site visit also identified relatively poor legibility and footfall between the river walkway and the Town Centre. In this context there could be potential to improve the links between the two areas if the Pound Lane development is progressed (see section below for details).

CUSTOMER VIEWS AND PERCEPTIONS

6.22 The household telephone interview survey asked specific questions on respondents' views and perceptions of Hadleigh Town Centre as a place to shop and visit for a wide range of uses and attractions. This included identifying key improvements that might encourage people to visit the town centre more often for shopping and other purposes. The 'top 15' features respondents liked about Hadleigh Town Centre are listed below.

Table 6.3 Feature respondents liked about Hadleigh Town Centre

Response	Study Area
Attractive environment / nice place	22.4%
Good range of non-food shops	19.9%
Close to home	15.8%
Nothing / very little	12.5%
Traditional	7.8%
Easy to park	7.3%
Close to friends or relatives	7.2%
Compact	6.3%
Has MW Partridge & Co. store	5.8%
(Don't know)	5.8%
Good food stores	4.5%
Makes a change from other places	4.2%
Free car parking	3.5%
Quiet	3.1%
Good range of independent shops	2.6%

Source: HTIS 2015

6.23 The main feature that respondents liked about Hadleigh Town Centre was that it has an attractive environment and the fact that it is '*traditional*'. Respondents also liked Hadleigh's range of non-food shops, and specifically the MW Partridge & Co store. The foodstore provision was also identified as being good.

6.24 As with Sudbury, a key factor respondents liked about Hadleigh is its proximity to their home, or that it is close to friends or relatives. This is linked to the relatively small size of the centre, which indicates that it serves a more localised catchment area. This correlates with the finding that the majority of respondents who live in Zone 5 (which includes Hadleigh) visited the centre on a frequent basis.

6.25 The free car parking offered by the council was selected as a positive feature, which is something unique to Babergh District. Notably perhaps, the market was not identified as a feature people liked about Hadleigh. This highlights the relatively small size of Hadleigh market and suggests that more could be made of this key local offer.

6.26 Respondents were also asked what, if anything, respondents would improve in Hadleigh Town Centre that would encourage them to visit more. The table below provides a summary of the top 15 frequently raised suggested improvements for the town centre.

Table 6.4 Key Improvements for Hadleigh Town Centre

Response	Study Area
Nothing	46.2%
(Don't know)	39.5%
More / better parking	3.0%
More national multiple shops / High Street shops	2.9%
If it was nearer	2.0%
More / better comparison retailers (i.e. non-food shops)	1.8%
Cleaner streets	1.3%
Other	0.7%
Better public transport	0.6%
More independent shops	0.6%
Free car parking	0.6%
Better access by road	0.6%
Better traffic management	0.3%
More / better food shops	0.3%
Fill vacant shops	0.2%

Source: HTIS 2015

6.27 Over 85% of respondents either stated there was *'nothing or very little'* that could be improved, or they could not think of anything. Key improvements identified included provision for more or better car parking, more high street branded shops, including better comparison retailers. Better access by road and public transport were also identified.

ENVIRONMENTAL QUALITY

6.28 The general quality of the public realm was observed in the 2015 site visit to be of a high standard. There were examples of public planting and the High Street was generally clean and well paved. As with the other centres in these Districts, the historic nature of the main shop frontages provides an attractive shopping environment.

6.29 There is little open space in the centre, with Market Place the only public open space in the primary shopping area. There are large areas of attractive green space within walking distance from the High Street, including the river walk. Legibility from the town centre through to the river could be improved, possibly through development of the Pound Street area (see below).

NEW INVESTMENT AND DEVELOPMENT

6.30 The main development and investment opportunities in Hadleigh include:

- The (3.7 hectare) site at **Pound Lane** (the former Brett Works Site) was allocated for retail development in the 2006 Babergh Local Plan (Policy HD01). However an application to develop a 2,500 m^2 Tesco was refused in 2013 because of the harm that would be caused to the High Street and the wider economy. This followed the opening of a large new Morrisons store in 2012 in an existing retail unit a short distance from the site. The issues and options stage of the emerging new Joint Local Plan considers the options for this site including reallocation, allocation for alternative uses or de-allocation. The site and surrounding area also has a number of constraints which will inform and influence any development opportunity, including flood risk issues.
- There is also the possibility of redevelopment of the currently vacant manor house, East House which lies on land adjacent to the leisure centre on **George Street**. Plans for the future use of this site are yet to be confirmed.
- Out of centre, land surrounding Copdock Mill is being developed according to guidance set out in the **Wolsey Grange Masterplan**, and is anticipated to include over 300 homes, employment land and a small cinema.
- A new Aldi store was approved at Scrivener Drive in Copdock in May 2015 (ref: 15/00124). The store will include 1,254m^2 net sales area of new floorspace (of which approximately 20% could be set aside for comparison goods sales).

6.31 In general, the conservation area in Hadleigh and strong competition from retail in and around Ipswich has inhibited further growth. It will therefore be important for the centre to enhance its existing assets, including the market, in order to draw in visitors.

OUT OF CENTRE

6.32 There is a limited out-of-centre retail offer in Hadleigh, although a large Morrison's store has recently opened on Calais Street just outside of the Town Centre boundary. The store is located in what was previously a QD Store, which still operates from this site but from a reduced floorspace. The survey evidence shows that this store has helped to 'claw back' market share from competing out-of-centre stores, although there is no evidence that it has benefited the town centre in terms of linked trips and expenditure.

6.33 The main out-of-centre provision that impacts on Hadleigh is located on the edge of Ipswich's urban area but within Babergh District at the Copdock Interchange (at the junction of the A12 and A14). This area includes a park-and-ride serving Ipswich, Suffolk Sixth Form College and a Holiday Inn. The main retail provision in the area includes a large Tesco Extra and Copdock Mill Retail Park, which has a number of multiples, including Toys R Us; Currys; Costa; B&Q; Mothercare; Multiyork and BM Bargains. Due to the competitive threat that Copdock Mill presents to Hadleigh Town Centre, any plans to intensify or expand provision here are restricted in the Babergh Core Strategy Policy.

SUMMARY

6.34 This health check has identified that Hadleigh has a number of key strengths and opportunities:

- The Town Centre has a relatively good retail and commercial leisure offer for a centre of its size, and largely complements the larger out of town provision at Copdock Mill.
- The mix of high end independent shops and cafes provide an offer that serves both the daily top-up shopping requirements of local residents and attracts visitors from the surrounding settlements.
- The town centre has a strong convenience offer, with two larger stores supplemented by local independent convenience stores.
- The comparison offer is focussed on homeware and non-fashion items for the most part, and includes a large and popular hardware store, MW Partridge & Co.
- Vacancy rates on the High Street are low overall, particularly along the primary frontage.
- There is scope to create better links to the River Brett walkway from the High Street, thereby facilitating movement through to the areas of attractive green space along this walkway.
- Hadleigh has a relatively small local market, which could be expanded in future in order to draw in visitors from a wider area.
- There is an opportunity to develop a large and currently disused site to the west of the High Street at Pound Lane.