Babergh District Council

Sudbury and Hadleigh Town Centre Health Check Report

July 2008

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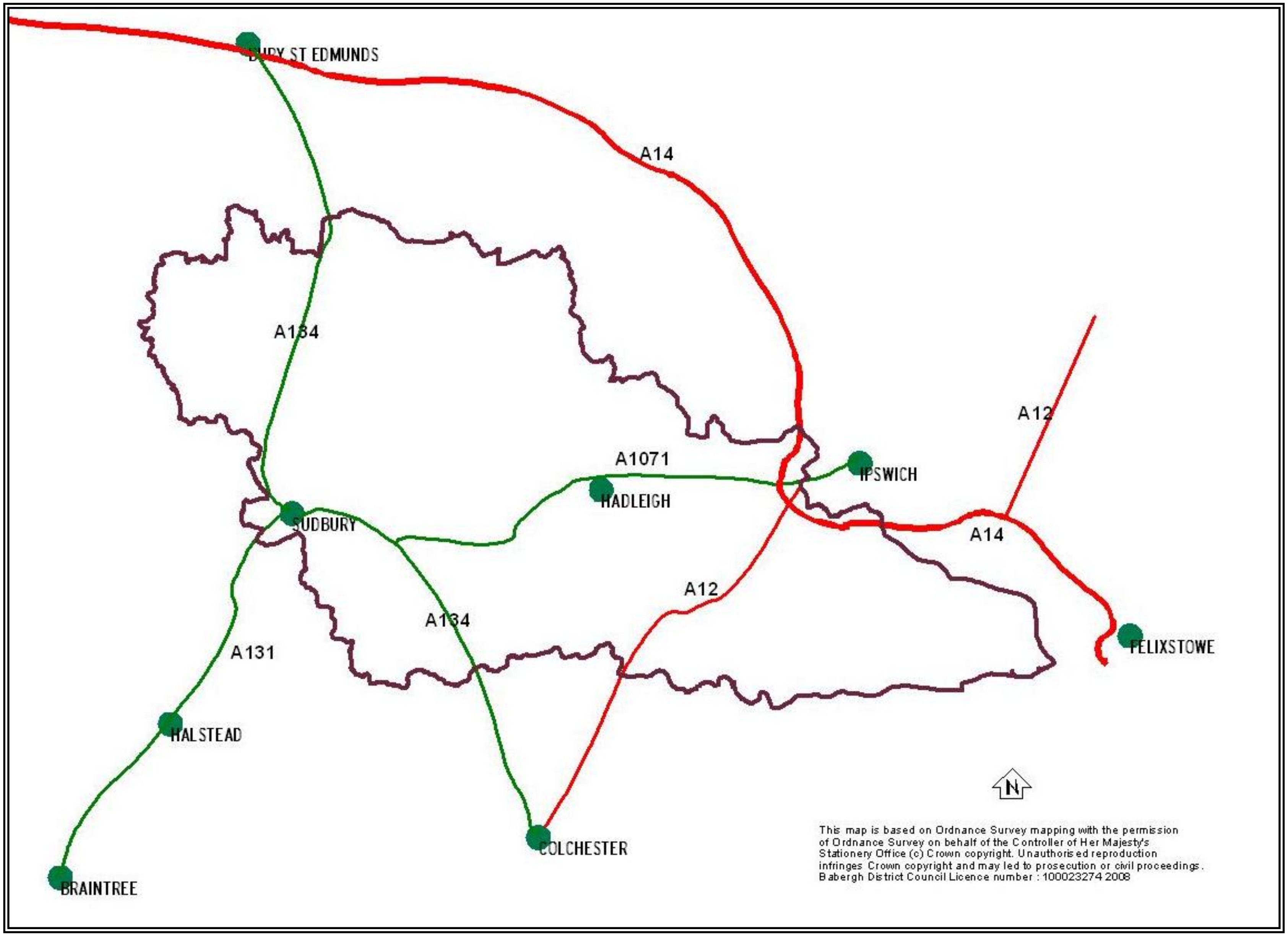
1. Introduction

1.1 The district of Babergh has two main towns, the largest Sudbury that lies to the western edge of the district, and Hadleigh, which is more centrally located as shown in Map 1. Both towns have a historic core, with more modern housing developments and industrial estates on the periphery. The hinterland of both is predominantly rural in nature including several villages and hamlets. Hadleigh lies close to the major town of Ipswich. The Sudbury and Hadleigh town centres are shown in Maps 2 and 3.

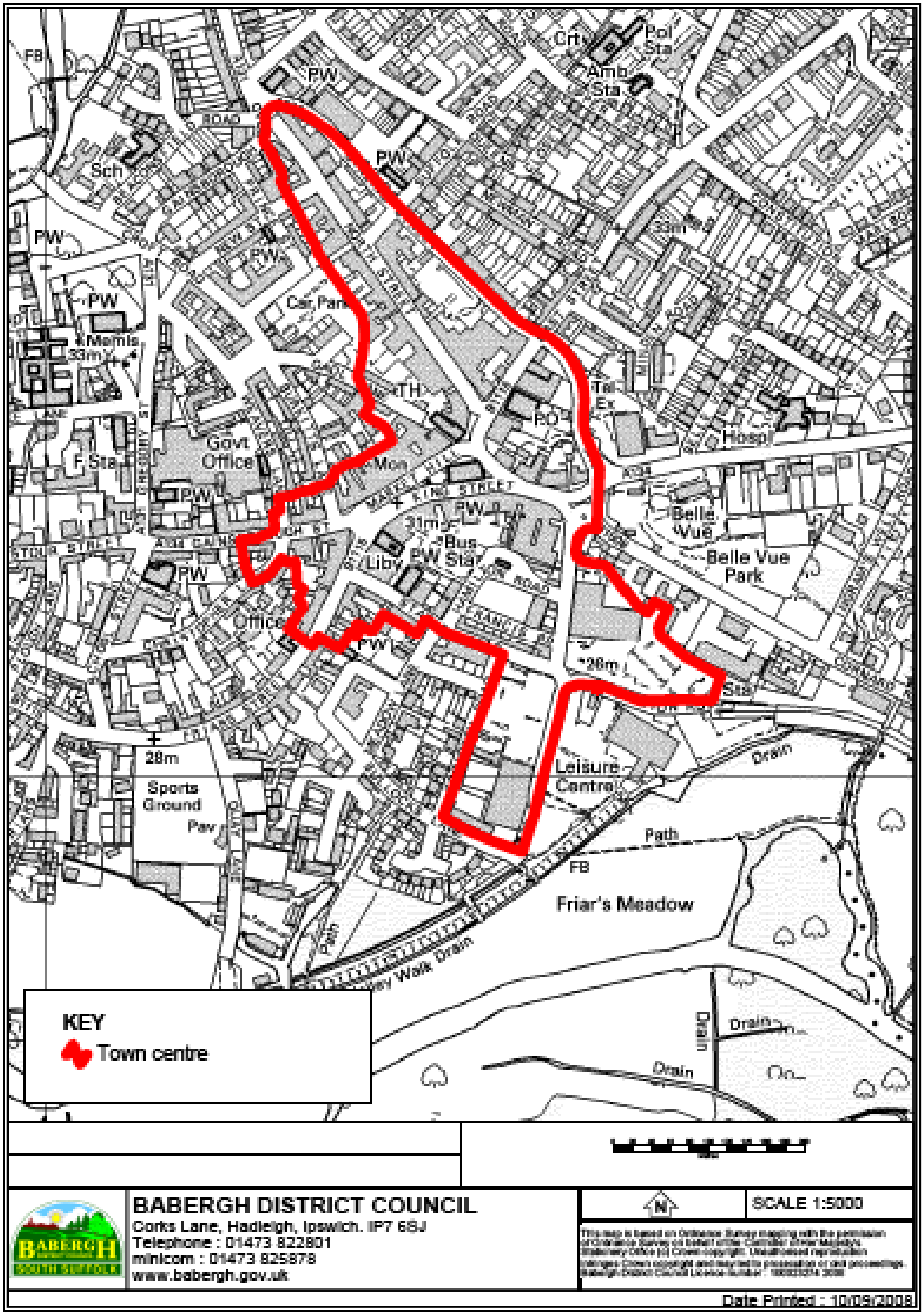
1.2 Babergh District Council has been undertaking town centre health checks since at least 1995. The last full health check to be drawn up in a report was undertaken in 1999. However, the changes in use of properties in the two town centres have been monitored annually. In addition to this Babergh commissioned a full investigation into the retail capacity of Hadleigh and Sudbury in 2002, which examined issues such as the supply and demand for various goods. This retail study was undertaken by specialist retail consultants Colliers CRE and informed the development of the Babergh Local Plan Alteration No. 2, which was adopted in June 2006.

1.3 To support the preparation of the new planning framework known as the Local Development Framework for the Babergh District and in particular to ensure a robust evidence base to support retail policies, Babergh District Council commissioned the 2008 Retail Study. The 2008 Retail Study provides an overview of the health, as well as the strength and weaknesses of the Sudbury and Hadleigh town centres and assessed their present and future roles within the District's shopping hierarchy. The report can be viewed on the Babergh District Council website (www.babergh.gov.uk – link) or a copy can be obtained from the Planning Policy Team.

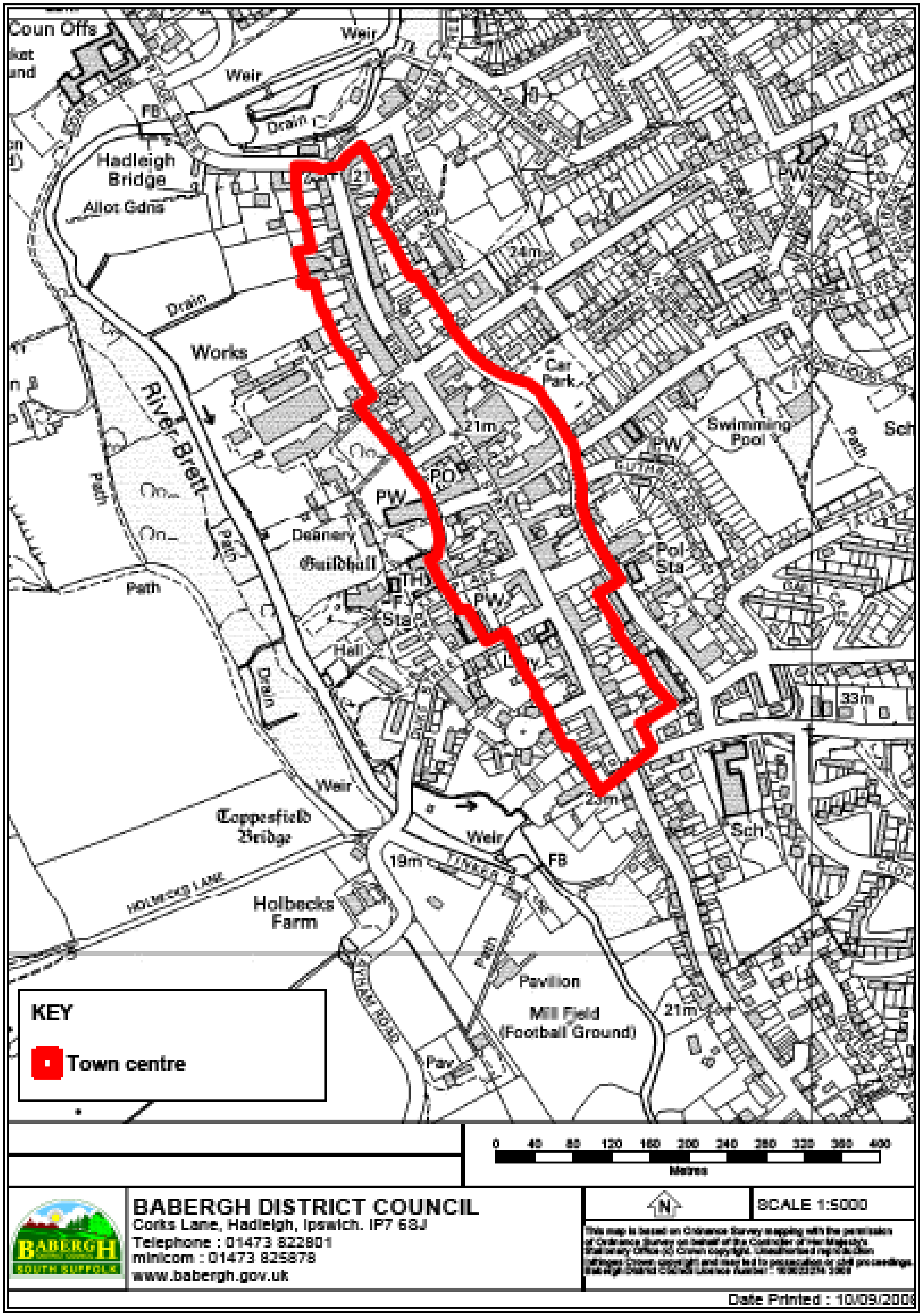
Map 1 - The Babergh District



Map 2 - Sudbury Town Centre Map



Map 3 - Hadleigh Town Centre



Planning Policy Statement 6: Planning for Town Centres (PPS6)

1.4 PPS6 was introduced in 2005, and it is aimed at promoting the vitality and viability of town centres. It also sets out the need to monitor the changes in town centres and impacts of other influences on town centres, in the form of a health check. PPS6 formalises the way in which a town centre health check is undertaken. This report follows the new methodology set out in PPS6 and therefore the variations between this report and previous health check reports.

1.5 The table below sets out the requirements for a town centre health check as contained in PPS6 and addressed in this report:

Factor	**Measurement**
Diversity of main town centre uses, edge-of-centre and out-of-centre	Number and type and amount of floorspace: a) town centres of Sudbury and Hadleigh; b) edge-of-centre of Sudbury and Hadleigh; c) out-of-centre locations
Potential capacity for growth or change of centres in the network	Opportunities for centres to expand or consolidate, land available for new or more intensive forms of town centre development
Retailer representation and intentions to change representation	Demand in retailers wanting to come to town centre, or change/reduce/close their representation (further information contained in the 2008 Retail Study)
Shopping rents	Pattern of movements in Zone A rents within primary shopping areas
Proportion of vacant street level property	Number and % of vacancies in prime shopping area
	Number and % of vacancies in secondary shopping area
Commercial yields on non-domestic property	Capital value in relation to the expected market rental
Pedestrian flows (footfall)	Count
Accessibility (ease and convenience of access by a choice of means of travel)	Number and location of car parks
	Frequency of bus services, quality of service, number of locations served
	Frequency of train services, quality of service, number of locations served
	Quality of provision for pedestrians
	Quality of provision for cyclists
	Quality of provision for the disabled
	Ease of access from main arrival points to the main attractions
Customer and residents' views and behaviour	Parish Council Survey (further information contained in the 2008 Retail Study).
Perception of safety and occurrence of crime	Number of crimes committed in the area
State of the town centre environmental quality	Assessment of the environmental quality including air pollution, noise, clutter, litter and graffiti
	Assessment of positive elements such as trees, landscaping and open spaces

2. Diversity

Diversity of main town centre uses, edge-of-centre and out-of-centre uses; number and type and amount of floorspace in:
a) town centres of Sudbury and Hadleigh;
b) edge-of-centre of Sudbury and Hadleigh; and
c) out-of-centre locations.

2.1 The Department of Communities and Local Government's States of the Cities Reports, 2008 (an interactive report on line at www.communities.gov.uk) detail the change in economic competitiveness between 2000 and 2004, with reports available for Sudbury and Hadleigh. Figures include the number of employees, floorspace and rateable value in various commercial sectors within the town centre.

2.2 Table 1, in the appendix, shows that the town centre area of Sudbury grew in size by 2.44% and that of Hadleigh reduced in area by 2.5% over the period 2000-2004. However, the reduction in overall size in Hadleigh has been compensated with the intensification of uses and extension of premises within the town centre. This is despite additional out of town and edge of town floorspace (Table 2) and the growth in general shopping on-line and also on-line grocery delivery. The average growth in the small towns in areas adjacent/close to Babergh was 0.35%.

2.3 Tables 3-9 in the appendix show a summary of floorspace and units by use class and Table 10 shows the unimplemented planning applications in the town centre.

2.4 Table 12 in the appendix, shows that there are a large number of leisure attractions in Sudbury, however only the first nine are within walking distance of the town centre, although it is likely that combined trips between the commercial uses of the town centre and leisure uses will be relatively low. The overall total of Sudbury is 318,896 sq m which is considered a good leisure offer. Hadleigh has approximately 87,143 sq m of leisure facilities although the types of leisure uses are more restrictive than at Sudbury.

3. Potential capacity for growth or change of centres in the network

Opportunities for centres to expand or consolidate; land available for new or more intensive forms of town centre development

3.1 There are 3 units (67 sq m) with planning permission in Hadleigh Town Centre and 5 in Sudbury (289.6 sq m). The Babergh Local Plan identifies the need for and allocates land for 2,500 sq m of additional floorspace for convenience goods in Hadleigh.

3.2 An extension for ancillary services on an out-of-town convenience goods store has been approved and similarly an extension to a bulky goods comparison goods store, both unimplemented, in Sudbury.

3.3 Further information can be found in the appendix in Tables 2 and 4 and in the Recommendations and Opportunities section at the end of this report.

4. Retailer representation and intentions

Demand in retailers wanting to come to town centres, or change/reduce/close their representation

4.1 Questionnaires were sent out to local and national land agents to request information regarding their knowledge on the intentions of retailers, amongst other questions. Two responses were received. The sample size is rather small, however when coupled with evidence from the survey work, the replies confirm that there is a low vacancy rate and that the predominantly small unit sizes does not allow for the requirements of interested companies, who would wish to come to the towns.

4.2 Further work was carried out as part of the 2008 Retail Study, by specialist consultants.

5. Shopping rents

Pattern of movements in Zone A rents within primary shopping areas

5.1 Two responses were received from the survey of local land agents. Sudbury experienced a modest to significant improvement in rental in retail premises, with the rental static for office space between 2002 and 2007. Hadleigh experienced a modest improvement in rents in retail premises, with the rents static for office space over the same period.

	Prime Retail Rental Value (£)	**2002-2008 increase**
Sudbury	70	10%
Hadleigh	32	10%

(Source: local consultants)

5.2 The Valuation Office Agency (VOA) (www.voa.gov.uk) release property shop and office town centre rental figures to cover a six month period, the most recent data available is for July 2007, for the major centres. Figures are not available from this source for the smaller towns in and around Babergh and Suffolk, meaning that a direct comparison can not be made.

Prime £/sq m/ annum	**Shops (£)**	**Office (£)**
Cambridge	2,485	220*
Ipswich	1,800	100
Norwich	2,250	140*
Colchester	1,850	125

* Denotes accommodation with air conditioning.
(Source: http://www.voa.gov.uk/publications/property_market_report/pmr-jul-07/shops.htm)

6. Proportion of vacant street level property

Number and percentage of vacancies in prime shopping area
Number and percentage of vacancies in secondary shopping area

6.1 Table 13 in the appendix details the full vacancy rates for both towns. There are 262 ground floor units in Sudbury, none of the 45 prime units are vacant, and just 13 of the secondary units are vacant or 5.99%. This gives an overall rate of 4.96% vacancy.

6.2 There are 117 ground floor units in Hadleigh, 3 of the 42 prime units were vacant (7.14%) at the time of survey in October 2007. However one larger shop was let in December 2007. 12 of the secondary units were vacant at rate of 12%. The overall vacancy rate in October 2007 stood at 10.26%.

6.3 Vacancy rates of between 5 and 13% are generally a good indication of a healthy town centre, allowing for turnover and up or downscaling of businesses, whilst ensuring that vacant premises do not detract from the vitality of the towns. However, the indication is that locally there are too few units available or that these are too small in size.

6.4 Colchester has a 10% vacancy rate (March 2008), Stowmarket 7% (May 2007 Retail Study Report) and Bury St Edmunds 3.7% or 11 units (September 2007). The Cattle Market mixed use development in Bury, with a department store and 35 shops and restaurants, is due to open in February 2009.

7. Commercial yields on non-domestic property

Capital value in relation to the expected market rental

7.1 "Factors which affect yield are complex, and need to be interpreted with reference to the circumstances in each individual town. Broadly speaking, however, low yields indicate that a town is considered to be attractive and as a result be more likely to attract investment than a town with high yields." Valuation Office Agency (VOA) www.voa.gov.uk

7.2 The yields for Cambridge, Bury St Edmunds, Ipswich, and Norwich have remained stable over the 7 year period, measured by the VOA, and range from 4.75% in Ipswich to 5.5% in Norwich. The yields for the remaining towns have improved over the period, improving their attractiveness to investors. Sudbury's yield has dropped from 7.75 to 5.75% at July 2007 and is lower than that of Newmarket, Haverhill, Felixstowe and Stowmarket; indicating a better proposition for investment (refer to Table 14 in the Appendix).

7.3 Hadleigh is too small to form part of the national picture, however local consultants have indicated that the yield is 6.5%. Hadleigh experienced a modest improvement in yields in retail premises, with the yields static for office space over the same period. Sudbury experienced a modest to significant improvement in yields in retail premises, with the yields static for office space between 2002 and 2007.

8. Pedestrian flows (footfall)

8.1 The count of pedestrian flow was undertaken in January/February 2008 (see below for specific dates) between the hours of 9-11am 12-2pm and 3-5pm to monitor the numbers of pedestrians in each town. This is a variation on the previous pattern of survey (last survey 1999) which was undertaken between the hours of 8.30am and 5.30pm, when more staff were available. Irrespective of the changes in the hours and undertaking the survey in winter months the number of pedestrians has increased. The 1999 Health Check is available on Babergh's website for comparison.

8.2 It is intended that the pedestrian flows will be monitored three times a year, to gain further insight into the pattern of pedestrian movement through the seasons. These will be reported in the annual health check for the Babergh Area.

Sudbury

8.3 The pedestrian flow or footfall was counted at 3 locations in the town. These were the northern and southern sides of Market Hill and North Street. The survey was undertaken on Saturday 19th, Monday 21st and Friday 25th January 2008, to assess the variation in numbers across the week. The full survey details are contained in the appendix.

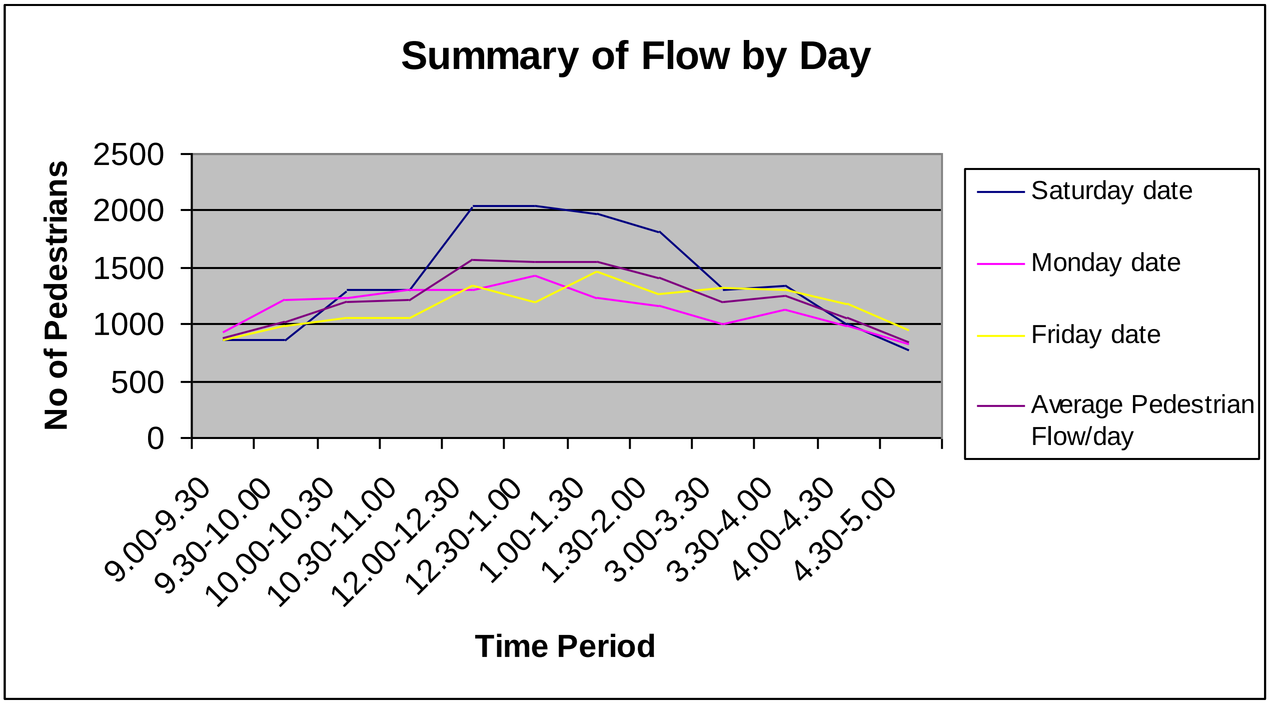
8.4 Markets are held in Sudbury on Thursdays and Saturdays, with a monthly farmers market in St Peter's Church on Market Hill. The later was in operation on the day of the survey between 9am and 1pm. There are also other one off events held in the town, such as a French Market and the Christmas lights switch on.

8.5 The peak flow in Sudbury was on the Saturday on North Street, where there were 935 pedestrians between 1.00pm and 1.30pm.

8.6 In North Street there were on average 618 persons per recording period (1236 per hour) on the Saturday, 507 per period on the Monday and 516 on the Friday. Comparatively measurements on the northern side of Market Hill were 547, 422 and 418 per period and on the southern side 218, 218 and 229 persons.

8.7 The flow generally shows a peak at lunch time then a steady drop, and then another increase around late afternoon, which appears on week days to relate to the school day finishing. A summary of the flow is shown in Figure 1 below, with greater detail shown in Tables 15-16 in the appendix.

Figure 1: Pedestrian Flows in Sudbury



(Source: Research completed by Babergh District Council)

Hadleigh

8.8 The pedestrian flow or footfall was counted at two locations in the town. These were both on High Street, one on the corner of the Market Place (south) and the other at the junction of Queen Street (north). The survey was undertaken on Saturday 26th, Tuesday 29th January and Friday 1st February 2008, to assess the variation in numbers across the week, see below. The full survey details are contained in the appendix.

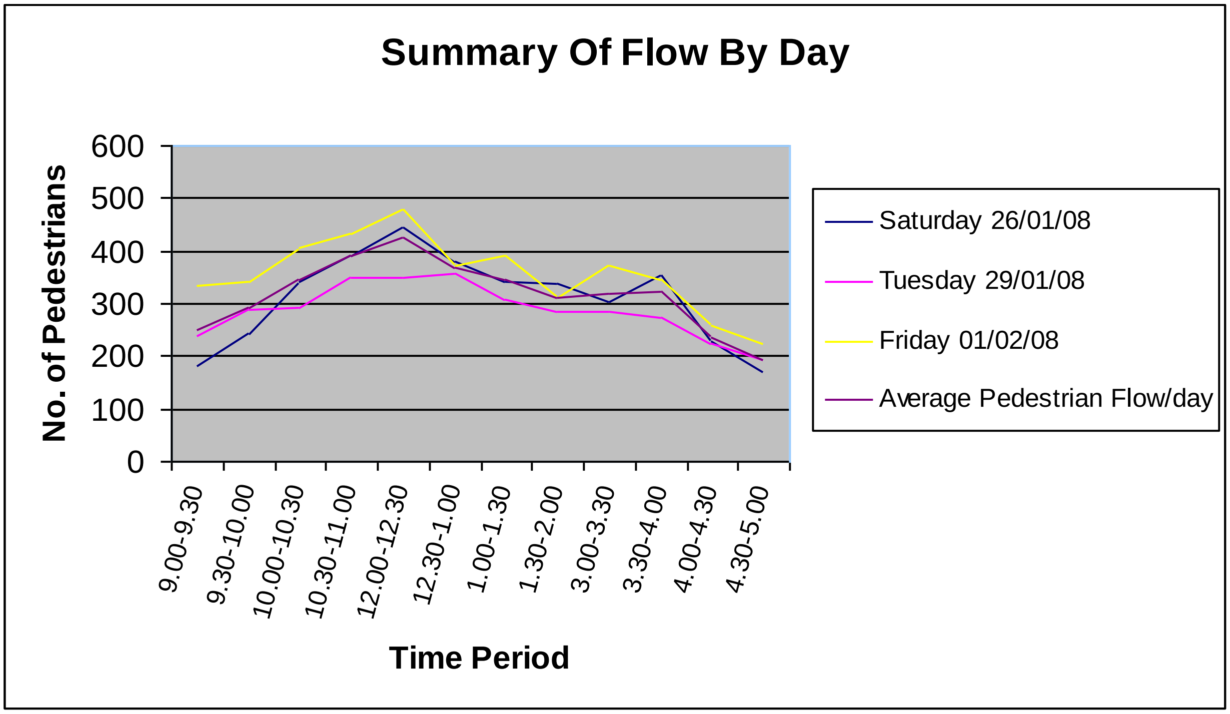
8.9 A market is held in Hadleigh on a Friday in market place, which usually closes by 1 or 2pm. Other occasional events that are held in the town include a May agricultural show and the Christmas light switch on.

8.10 The peak flow of pedestrians was 224 between 12 and 12.30pm on the Saturday at the southern end of the street.

8.11 At the southern end of High Street there were on average 141 persons per recording period (282 per hour) on the Saturday, 154 per period on the Tuesday and 173 on the Friday. Comparatively measurements on the northern end were 168, 134 and 183 per period.

8.12 The flow generally shows a higher number of pedestrians in the morning, followed by a drop in numbers over lunchtime (with the exception of Fridays) and a further peak late afternoon, which on weekdays could relate to the finish of the school day. A summary of the flow is shown in Figure 2 below, with greater detail shown in Tables 17-18 in the appendix.

Figure 2: Pedestrian Flows in Hadleigh



(Source: Research completed by Babergh District Council)

9. Accessibility (ease and convenience of access by a choice of means of travel)

Number and location of car parks

9.1 Parking is currently free in Sudbury and Hadleigh, although users of the car parks are required to place a timed ticket in their windscreen to ensure a turnover of vehicles. Full details of the availability of parking spaces can be seen in the appendix.

9.2 The total number of off-street parking spaces in Sudbury town centre and edge of centre locations are 1045, including 31 spaces reserved for disabled badge holders, 2 taxi and 12 lorry park spaces. In addition to this much of Market Hill is given over to short term on street parking, with additional spaces on North Street and Gainsborough Street in marked bays.

9.3 The total number of off-street parking spaces in Hadleigh town centre is 310, including 13 spaces reserved for disabled badge holders. In addition to this parking on High Street is available. The car park adjacent to Babergh Council's Offices, on Bridge Street, is also available for parking outside of office hours, although close to the northern area of the High Street it is rarely used in these hours.

Frequency of bus services, quality of service, no of locations served

9.4 Access to bus services in rural areas, across the district, in 2005/6 was a significant improvement on the previous years. However, this is still lower than 3 of the other Suffolk districts.

Percentage of rural households within 13 minutes walk of an hourly bus service

%	2001/2	2002/3	2003/4	2004/5	2005/6
Babergh	30.0%	25.2%	33.0%	35.6%	51.2%
Forest Heath	35.0%	35.1%	54.2%	51.9%	72.7%
Ipswich	-	-	-	-	-
Mid Suffolk	10.0%	9.9%	15.3%	28.2%	29.6%
St Edmundsbury	23.0%	22.7%	24.3%	32.0%	35.8%
Suffolk Coastal	37.0%	36.6%	33.3%	48.4%	45.5%
Waveney	16.0%	16.8%	12.7%	41.2%	54.0%
Suffolk	**23.0%**	**22.7%**	**26.0%**	**37.2%**	**42.5%**

(Source: Suffolk's Environment)

9.5 Neither the bus station at Hadleigh nor Sudbury is particularly large, with the later showing its age. Both are located close to their relevant town centre, but the access points could be improved.

9.6 Bus services serve the hinterland of each town and the larger surrounding towns such as Ipswich, Colchester and Bury St Edmunds.

Sudbury

Number of Bus Services Terminating or originating at Sudbury bus station	15
Other Services passing through Sudbury	3
Total Number of bus services to Sudbury	18
Number of operators serving the town	12

(Source: http://www.traveline.org.uk/index.htm)

9.7 One of the services that operate in Sudbury is the Lavenham Area Mini Bus Scheme (L.A.M.B.S). The scheme travels to the villages of Bildeston, Brent Eleigh, Brettenham, Lavenham, Kettlebaston, Milden, Monks Eleigh, Preston St Mary and Wattisham, and runs scheduled services to Sudbury & Bury St Edmunds. It also provides a dial-a-ride service.

Hadleigh

Number of Bus Services Terminating or originating at Hadleigh bus station	7
Other Services passing through Hadleigh	3
Total Number of bus services to Hadleigh	10
Number of operators serving the town	9

(Source: http://www.traveline.org.uk/index.htm)

9.8 Two of the services to Hadleigh are feeder services, one is the Hadleigh Feeder and the other is Buzabout.

9.9 Hadleigh Feeder is a new service supported by Suffolk County Council and operated by Hadleigh Community Transport. If you are having difficulty getting where you want via scheduled bus or train services, the Hadleigh Feeder provides convenient options for connections between your village and other destinations. Journeys may be booked for travel between the following villages: Aldham, Chattisham, Duke Street, Edwardstone, Elmsett, Flowton, Groton, Kersey, Lower Layham, Lower Raydon, Semer, Shelly and Whatfield or into Hadleigh where connections may be made for onward travel.

9.10 The Buzabout is a feeder service that helps people in the Shotley Peninsula who do not live near a bus route. They provide door to door transport to places such as Ipswich, Manningtree and Hadleigh. You just have to book your journey before hand and it costs about the same as a bus fare. They have two vehicles; one is a six seater with wheelchair access and the other is a mini bus for bigger groups.

Frequency of train services, quality of service, and number of locations served

9.11 There is no train station in Hadleigh. The Sudbury branch line runs to Marks Tey, which is a mainline station on the Norwich to London line, providing access to Chelmsford, Colchester and Ipswich.

Day	**No. of trains**
Monday to Saturday	25
Sunday	15

(Source: http://www.traveline.org.uk/index.htm)

Quality of provision for pedestrians

9.12 There are relatively good provisions for pedestrians, with wide pavements and seats in many locations in Sudbury. Additional crossing points are required to link King Street to the eastern side of the town.

9.13 Hadleigh has much narrower streets and pavements and with this comes a lack of benches at appropriate points.

Quality of provision for cyclists

9.14 Generally, there are few cycle lanes in either of the towns, due to the narrow streets and conflicts with vehicular traffic. In Sudbury few cyclists were seen with their bicycles whilst undertaking the pedestrian flow survey, however this may be the result of landform or that there is a good bus service or that there are sufficient cycle parking positions.

9.15 There is a low provision for cyclists in Hadleigh despite good use of bicycles (as noted from pedestrian flow survey). There is an opportunity to encourage cycle use through the provision of cycle stands.

Quality of provision for the disabled

9.16 Whilst work has been undertaken in both towns to make the pavements more accessible, provide additional car parking spaces for disabled badge holders, level access to services (where possible) and to remove extraneous signage placed on the street, further improvements can be made.

Ease of access from main arrival points to the main attractions

9.17 Navigating around the Sudbury one-way system in a vehicle is complicated, with little early warning of car park locations. Pedestrian signage, where it exists can be misleading (the finger posts are loose and can be spun) or is lacking information. The route to the town centre from the train or bus station is not clearly defined and involves crossing a significant flow of traffic along Great Eastern Road, although there is a pelican crossing. The roundabout at the junction of Great Eastern Road, Bures Road and Girling Street etc. is dangerous to cross on foot. Proposals have been put forward to provide marked crossing points.

9.18 Map information boards have been a feature of Sudbury for several years. These are now out of date and are due to be replaced in 2008-09.

9.19 Navigation around Hadleigh is somewhat easier with lower levels of traffic. Parking areas can be clearly identified. However pedestrian signage is in a similar condition to that at Sudbury, although additional signs to some of the historic attractions have been added in the last 4 years. A marked crossing point at the northern end of High Street either close to Angel Street or close to Bridge Street would reduce pedestrian conflict at the northern end of town.

9.20 Babergh District Council and Mid Suffolk District Council support a tourism scheme, which includes accommodation, what to see and do, walking festival, and voucher leaflets which can be accessed through the Tourist Information Centre (attached to the Town Hall) in Sudbury and through the tourist information point in Hadleigh Library (High Street).

10. Customer and residents' views and behaviour

Parish Council Survey

10.1 Babergh District Council forwarded a survey to the parish councils within the district, to identify the main reasons why people come to visit or shop in Hadleigh and Sudbury. The survey provided an insight into what people like and dislike about shopping in the two town centres.

<u>Hadleigh</u>

10.2 Of the 49 parish councils on the eastern side of the district 16 responses were received; demonstrating that specialist shops are highly valued, along with free car parks. The parish councils thought it was significant that Hadleigh does not possess the usual chain of high street shops, which allows other smaller specialist to prosper.

Other reasons for visiting Hadleigh include: linked trips, visiting the Library and the Babergh District Council offices, wanting to support the local market town and businesses and also the fact that many of the shops have staff with friendly and helpful attitudes.

10.3 On the negative side was the lack of leisure activities and cycling facilities. There were also concerns about the development of a Tesco superstore on the Brett works site, for which a planning application is under consideration.

Sudbury

10.4 Of the 39 parish councils on the western side of Babergh, 17 replies were received. The results showed the main reasons that attracted people to Sudbury are the market, the free car parks and the proximity to where people live. Other positive attractions include: linked trips, Belle Vue Park, the water meadows and the Croft. Sudbury is a compact shopping area, it is good for general/daily shopping and it also has a Waitrose supermarket, which is the only one in the district.

10.5 The reasons for not visiting Sudbury were the amount of peak time traffic and the lack of cycling facilities. Other matters that arose were the reduced range of shops such as attractive cafes/wine bars and young fashion outlets and the loss of smaller independent shops to large chains.

Retail Capacity Study 2002: Sub-Regional Shopping Patterns

10.6 This study assessed the quantity, the extent and the pattern of expenditure retention and leakage from the towns Sudbury and Hadleigh, based on a household survey of the Babergh District and its shopping hinterland, for convenience goods and non-bulky and bulky comparison goods within the sub-region.

Sudbury Zone

10.7 Sudbury's town centre core catchment area attracts 66% of available expenditure for non-bulky comparison goods shopping. For bulky comparison goods 19% of expenditure flows to the small out of town centre retail warehouses, with 49% flowing to the town centre, meaning that 68% of expenditure within Sudbury is retained locally. The town centre retail offer for convenience goods is 32%, with the out of town offer at 59% and 4% for Aldi at the edge of town centre; the overall expenditure is 98%. Convenience shopping in Sudbury is dominated by the out of town centre Tesco superstore at Woodhall.

Hadleigh Zone

10.8 Hadleigh is not strong enough to generate either a core or primary catchment for non-bulky comparison goods, with an expenditure of only 21%. Hadleigh performs better in relation to bulky comparison goods shopping, with expenditure retention of 27%, a secondary catchment, as 51% leaks into Ipswich. Hadleigh is strongest in terms of convenience goods shopping (when compared with Sudbury) and generates an expenditure of 38%. However, 39% leaks to Ipswich town and another 22% to the Tesco at Copdock, again a secondary catchment.

Retail Capacity Study 2008: District-Wide Food Shopping Patterns

10.9 The 2008 Retail Study quantified consumer behaviour to determine the retail market within the Babergh district and within Sudbury and Hadleigh. The assessment draws on the results of a household telephone survey which was carried out in April/ May 2008 within the Babergh District and its shopping hinterland.

<u>Sudbury Zone</u>

10.10 The district retains only 36% of its comparison goods spend. To this total, the district attracts an estimated in-flow of £77 million (primarly to Copdock Mill and Sudbury). Sudbury currently accounts for 64% of the District's comparison goods sales. Copdock Mill accounts for 29% of the turnover, whilst the balance of 3% flows to the other smaller centres. For convenience goods it is estimated that the district attracts £71 million but that £52 million leaks to other areas. Babergh is a net importer of convenience goods. The district retains around 65% of the convenience goods expenditure generated within the area. For convenience goods Sudbury accounts for 45% of the District's convenience goods trade. The Tesco Extra at Copdock Mill attracts around one-third of the District's convenience goods sales, with other smaller centres attracting the balance of 15%. Sudbury's catchment area for comparison goods and convenience goods shows that the town generates a catchment for its immediate surroundings, areas within Babergh as well as areas outside of the district in Suffolk and Essex.

<u>Hadleigh Zone</u>

10.11 Hadleigh attracts only 4% of the District's comparison goods sales. In terms of convenience goods, Hadleigh attracts just 6% of turnover in the district. Hadleigh is too weak in comparison goods to generate a catchment area. Hadleigh's influence for convenience goods shopping is relatively weak, the town retains 38% of the available spend of its immediate surroundings.

11. Perception of safety and occurrence of crime

No of crimes committed in the area

Crimes/1000 pop	**2000/1**	**2001/2**	**2002/3**	**2003/4**	**2004/5**	**2005/6**
Babergh	46.8	49.9	51.6	56.2	55.4	56.3
Forest Heath	72.7	84.9	76.4	85.4	78.1	81.8
Ipswich	97.3	115.9	122.3	134.3	126.8	128.4
Mid Suffolk	34.1	37.1	35.7	41.6	43.6	45.1
St. Edmundsbury	67.4	70.7	73.3	69.6	76.8	81.1
Suffolk Coastal	45.6	48.8	48.4	54.7	58	58
Waveney	77	82	81.6	90.1	85.4	82.3
Suffolk	**64.1**	**71**	**75**	**79.5**	**76.8**	**77.9**

(Source: Suffolk's Environment)

Reportable Crimes	**Hadleigh**	**Sudbury**

2004/05	434	1359
2005/06	415	1535
2006/07	403	1394

(Source: Suffolk Constabulary)

11.1 Whilst it is evident from the figures above that the actual crime figures in Hadleigh and Sudbury are low there is known to be a perception that crime is high in Babergh as a whole.

12. State of the town centre environmental quality

Assessment of the environmental quality including air pollution, noise, clutter, litter and graffiti

12.1 A street cleanliness audit is carried out for Babergh, quarterly each year. It measures the percentage of streets which are not up to the required standard of cleanliness, the most recent survey (March 2008) shows that the streets are up to standard in the town centres of Sudbury and Hadleigh.

12.2 There is however a significant amount of chewing gum on the northern pavement of Market Hill, Sudbury, which detracts from the reclaimed York stone paving.

12.3 In 2008 the Hadleigh Town Council will be steam cleaning the town centre streets.

12.4 The following table details the number of noise, litter and graffiti complaints reported to Babergh over the last 5 years, in the town centres. It should be noted that these are low.

	Hadleigh						**Sudbury**					
	2002	**2003**	**2004**	**2005**	**2006**	**2007**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**
Noise	4	7	2	3	3	2	11	7	4	12	15	20
Litter	32	26	20	12	16	17	55	75	41	34	35	47
Graffiti	0	0	0	0	0	0	0	0	0	0	0	0

Assessment of positive elements such as trees, landscaping and open spaces

12.5 Both towns are attractive places with historic cores and have had the benefit of historic building grant aid over a number of years to repair the buildings and reinstate architectural detailing, along with enhancements to the streets.

12.6 The only open space off the High Street in Hadleigh is the Market Place. An environmental enhancement scheme was undertaken a few years ago, and some maintenance is required, with much of the mortar between the York stone damaged.

12.7 Sudbury's North Street/Gainsborough Street/Market Hill have all benefited from enhancement schemes, the most recent of which 2 years ago. Sudbury takes part in the Britain in Bloom competition each year but the planters are left empty in the winter months, which is a lost opportunity.

12.8 Sudbury Town Council have proposed a number of additional trees for the town centre, however, the plan has yet to be implemented.

12.9 Both Sudbury and Hadleigh have new town trails, with leaflets and guided walks. In Sudbury a series of bollards mark out important sites with a small sculptured finial.

12.10 As part of the new restrictions on smoking in public houses and restaurants Babergh is supporting a scheme to replace many of the litter bins in key locations around Sudbury and Hadleigh. These bins will have a special top for stubbing out cigarettes, reducing the number of cigarette ends on the streets, a particular problem outside Boots on Market Hill, Sudbury.

13. Summary

13.1 This health check report indicates that both Sudbury and Hadleigh town centres are healthy and the results of this report compared well with the results of the 1999 health check report. The vacancy rates of Sudbury and Hadleigh fall within the 5-13% range that is generally accepted as healthy and there has been no increase in the vacancy rates in these town centres. Both town centres have grown/ intensified their uses since 1997, despite increases in convenience goods provision at out-of-town or edge-of-town locations. Indeed, the reduction in yields in these town centres makes it very attractive for investors. Increases in the prime retail rental value in Sudbury and Hadleigh were recorded between 2002 and 2007.

13.2 Both Sudbury and Hadleigh are considered accessible by a choice of means of travel. A significant number of car parking spaces are available in Sudbury and Hadleigh. Sudbury is accessible by rail, whilst both Sudbury and Hadleigh have bus stations and are well served by public transport. Provision are made for pedestrians, cyclists and the disabled, although these as well as signage could be improved in both these town centres.

13.3 Customer and residents' views indicated that in Hadleigh the specialist shops and free car parks and in Sudbury the markets and free car parks are highly valued. Concerns include the lack of leisure facilities and development of a superstore in Hadleigh and peak time traffic and the lost of smaller independent shops to large chains in Sudbury.

13.4 Higher pedestrian flows were recorded for both Sudbury and Hadleigh than in 1999. Low crime figures were recorded for Hadleigh and Sudbury. The environmental quality of the both town centres were considered as good with low recordings of noise, graffiti and litter.

13.5 Limited further expansion opportunities and other opportunities for individual businesses to grow exist in the town centres of Sudbury and Hadleigh. The broader development context, as well as offering wider opportunities for growth and diversification, has to be considered.

14. Further work

14.1 PPS6 only requires that health checks are undertaken for towns and in Babergh's case this is for Hadleigh and Sudbury. However, it is recognized that Lavenham, Long Melford and Great Cornard have a part to play in the retail economics of the District as do village facilities. It is intended that health checks will be undertaken to assess these three settlements and an assessment completed for the rural areas.

Percentage of rural population living in parishes which have a food shop/general store, Post Office, pub, primary school and meeting place

	Total Rural Population (SCC 2005)	2001/02	2002/03	2003/04	2004/05	2005/06
Babergh	46,399	-	64.0%	41.5%	29.18%	34.30%
Forest Heath	13,425	-	4.4%	-	54.06%	54.06%
Ipswich	0	-	-	-	-	-
Mid Suffolk	60,987	49.8%	39.8%	43.1%	22.49%	49.68%
St Edmundsbury	42,310	41.6%	51.6%	47.8%	47.71%	48.92%
Suffolk Coastal	43,583	29.6%	29.8%	44.5%	35.71%	35.71%
Waveney	13,452	33.8%	11.9%	11.9%	12.20%	3.09%

(Source: Suffolk County Council)

15. Recommendations and Opportunities

15.1 Many of the ideas put forward below can be undertaken in the short term within the community. Others require more thought and a longer timescale and require further investigation, the support and co-operation of other bodies, such as Network Rail, and introduction into the longer term spatial strategies.

Vehicular and pedestrian signage

15.2 In several locations there is defunct signage, which either no longer refers to an extant location or is the remains of some former signage. The Sudbury Society had undertaken an Audit of the defunct signage in Sudbury, noting the posts without signs, and locations where, perhaps relocation of the sign onto a building might be preferential.

15.3 It is recommended that a similar survey of Hadleigh be undertaken by the community, as and when the opportunity arises for signage to be removed or corrected.

15.4 Much of the pedestrian signage in the towns could be improved, whilst there have been recent schemes to enhance the direction for pedestrians, it is still difficult to navigate from the car parks and bus stations into the town centre, particularly for first time visitors to the town. A good example would be the journey from Girling Street Car Park to Gainsborough House in Sudbury.

15.5 In addition to the lack of direction, the condition of the signs is a concern. There is no maintenance budget for their up keep and many of the older finger post signs are able to be twisted about the post to point in the wrong direction. It is recommended that an annual sum of money be made available for the repair, replacement and redecoration of finger post signage (see street furniture below).

Disabled Provision

15.6 An audit of both Hadleigh and Sudbury is recommended, although the issues in the Sudbury audit under taken in 2003 by the Sudbury Society have now mostly been resolved. A three yearly audit is recommended.

Street Furniture

15.7 The condition of much of the street furniture in both Sudbury and Hadleigh is deteriorating, where there is street furniture. Babergh District Council does not have annual street furniture budget for repair, replacement or maintenance. However, through the grant support for the Britain in Bloom campaign in Sudbury, redecoration of some street furniture is required by the Sudbury Town Council.

15.8 Is it recommended that a sum of money be set aside each year, with an annual rolling programme for repair of street furniture. The appropriate way for this to be funded and then managed needs further investigation.

15.9 It is also recommend that one colour scheme is developed and maintained for each town, there are multiple combinations on Market Hill in Sudbury alone which detract from the historic location and retail offer.

Shop Fronts

15.10 Several years ago a scheme was developed for the restoration of shop fronts in both Hadleigh and Sudbury, and previous grant aid schemes have helped to implement this work. However, there will be no more grant schemes operating to target the remaining shop fronts or the maintenance of the historic or restored ones. Consideration should be given to continuing this work, and to establishing a grant budget which could support the restoration work and a programme of redecoration, particularly for small businesses.

15.11 It is acknowledged that changing shop window displays make an area attractive and encourage business. A competition, perhaps run by the local Chambers of Commerce or Town Council, on a monthly or even seasonal basis (spring, summer, autumn, winter, Easter, Christmas) or for existing special events (themed) would encourage businesses to consider their shop windows in greater detail. The windows of banks and other services and vacant units could also be targeted in this manner, adding to the overall vitality.

Toilets

15.12 The existing public toilets in both Sudbury and Hadleigh could benefit from repair and maintenance and additional signing for pedestrians.

Advertising and Public Relations

15.13 The continuation of the marketing of the towns is important. Babergh District Council, jointly with Mid-Suffolk District Council, operates a tourism marketing campaign. Other bodies and groups operating within these town centres could explore opportunities related to marketing of the towns, particularly with regards to the retail opportunities that these towns offer in order to keep the towns ahead of the competition (against which they are currently doing well).

Markets and Events

15.14 Additional marketing and signage for the current markets held in the towns, to attract both new customers and new stall holders, is recommended.

15.15 The types of markets held could be widened, or the periods or numbers of days for the markets extended. It was noted that the monthly Sudbury Farmers Market closed at 1pm, missing at least an hour of passing pedestrian trade.

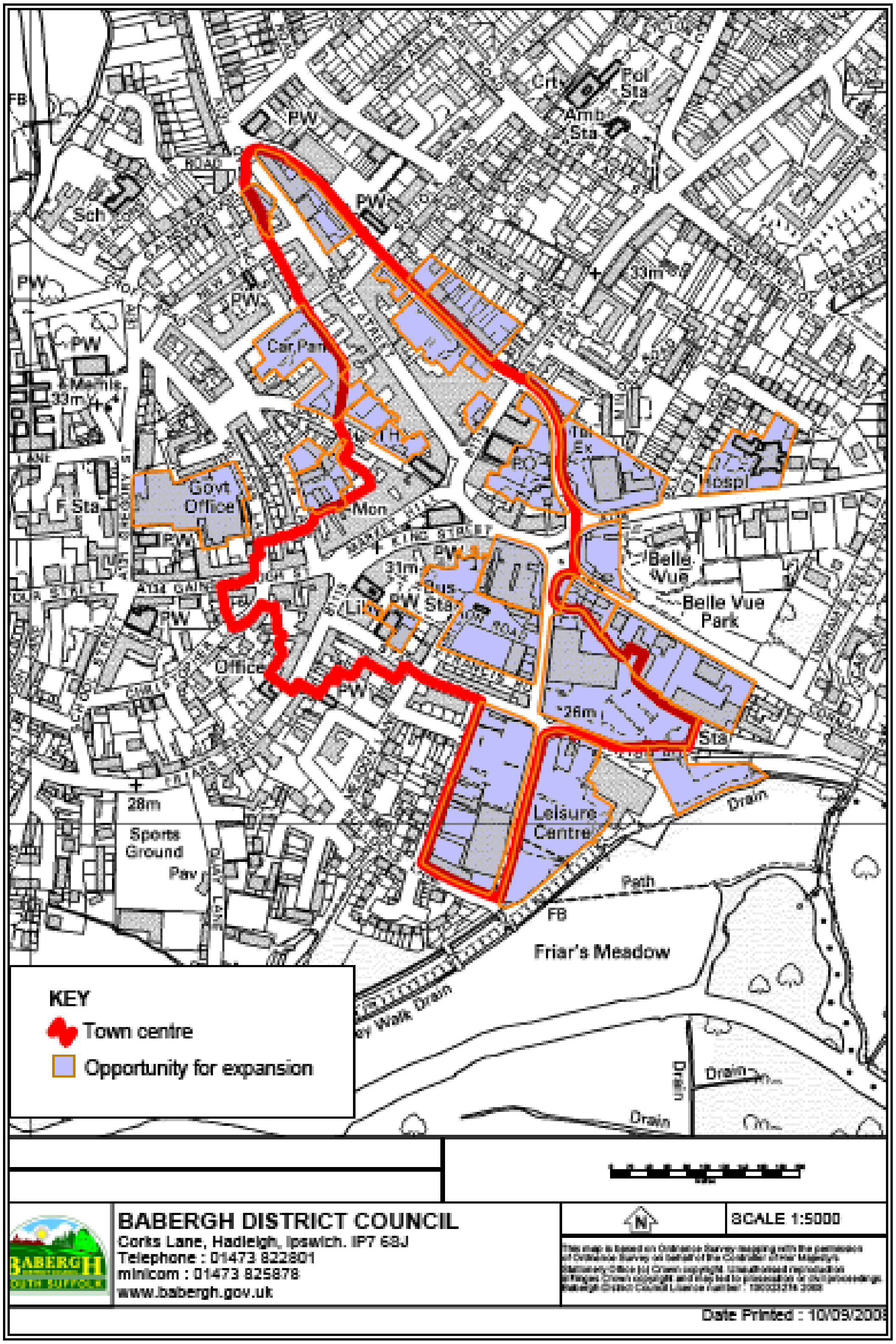
15.16 The number of town events could be extended in both towns.

Parking

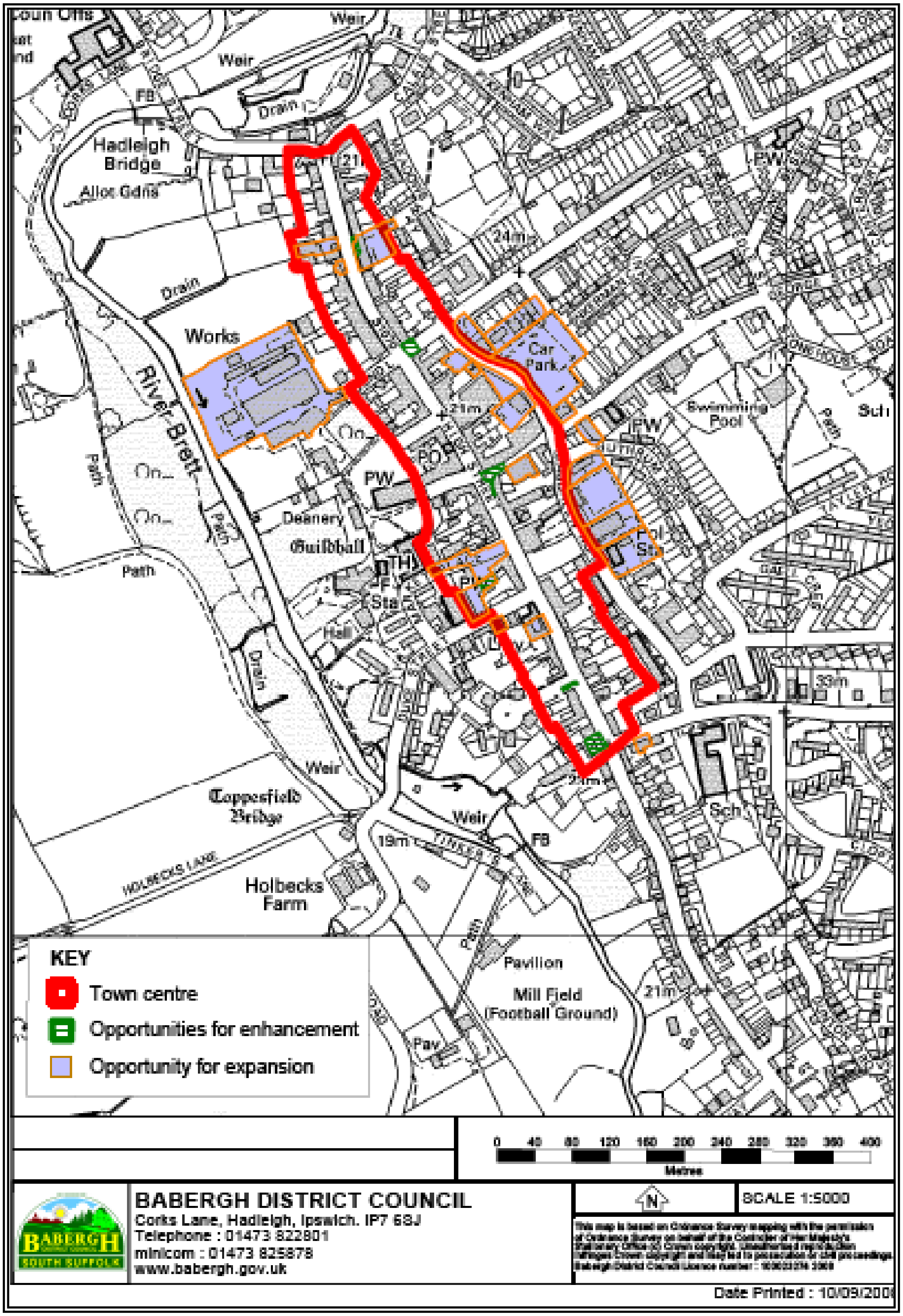
15.17 Parking is an emotive issue in the whole of the district. There are a significant number of spaces in each town, which are available for free, unlike neighbouring districts. However, monitoring of both the car parks and the on street parking is required as there is widespread abuse of the system, in terms of time and location. One vehicle was parked in a one hour space on Market Hill Sudbury for at least 6 hours.

15.18 It is recommended that a parking warden(s) be employed to ensure that the use of short term parking is fair. Whilst the cost of such an operation has been discussed on many occasions, there may be an opportunity that has been missed. It is recommended that local businesses, in the town centre, be given the opportunity to advertise on the back of the parking tickets, on a short period rotational basis, for a small charge. This increases the advertising potential for these businesses and increases the number potential customers due to a quicker turnover of vehicles.

Map 4 – Areas of Opportunity in Sudbury



Map 5 – Areas of Opportunity in Hadleigh



15.19 Sudbury

- Improve access across King Street/Old Market Place, with drop kerbs;
- Steam cleaning of the pavements in Market Hill and North Street;
- Bus Station/Train Station link;
- Increased cycle parking;
- Undertaking additional landscaping, reusing the planters in winter to a greater extent and continuing with the Britain in Bloom competition;
- Introduce a loading bay on Market Hill;
- The use of upper floors for commercial or residential uses (in order of preference);
- Delivery compaction: using smaller vans within the town centre, reduce large lorries in centre. An out of town accessible site would need to be identified for the change over;
- Park and ride;
- Links to Belle Vue Park; and
- Address traffic congestion in the town centre particularly traffic in the Market Hill area.

15.20 Opportunities for expansion of town centre uses

- Mixed use site/Borehamgate has been identified in the Babergh Local Plan Alteration No. 2, Policy SD06;
- Newton Road/Great Eastern Road/Bures Road/Girling Street Junction;
- Rear of properties on northern site of Market Hill identified in Policy SD07;
- North Street Car Park;
- Gainsborough Street (similar to Hadleigh's northern High Street) to Silk Mill;
- North Street as identified in Policy SD08;
- Roys of Wroxham/Waitrose/Leisure Centre on Great Eastern Road; and
- Relocation of some uses to Chilton Woods, when developed or Poplar Road or more suitable edge of town locations.

15.21 Hadleigh

- Introduce cycle stands;
- Consider opportunities for cycle routes;
- An additional disabled parking bay on High Street at the junction of Angel Street is required, to allow safe parking of vehicles;
- Provision of benches and repair/replacement of the existing ones where damaged;
- Tree maintenance;
- Provision of soft landscaping (narrow pavements restrict use of hanging baskets and window boxes as does the number of listed buildings) including the corner of High Street/Toppesfield Close, the War Memorial and the Market Place;
- An enhancement in the form of a paving scheme for remainder of High Street;
- Improvements to the Bus Station;
- Increase the market for office space, as low demand has left several usable upper floors empty for some time;
- Creation of a one way system along High Street and Magdalen Road from the junctions with Angel Street and Station Road (both of which remain two-way);
- Future consideration of a Community Railway beyond 2010 (the rail network's programme established up to that date) and shuttle bus service/cycle parking under cover;
- Coach parking/shuttle;

- Recently a Project Group was established to develop local food focus initiative;
- Long/short term car parking in Hadleigh should be reviewed to allow decent time of about 1-2 hours for shopping and to ensure that spaces are not needlessly taken up all day where other long term parking options are available;
- Use of Babergh's Car Park on the weekends and out of office hours to be encouraged. For those needing to drive into the town but capable of walking, this would support the sustainable principles that the town is trying to encourage (see above mentioned point); and
- Calais Street Recreation ground.

15.22 Opportunities for expansion and widening retail in town centre might include:

- Brett Works (identified in the adopted 2006 Local Plan and the 2002 Retail Study);
- The relocation of Ainger Holbrow and Groves Car Sales (perhaps to the industrial areas or to Aldham Mill Lane;
- Extension of 112 High Street forward at ground level to meet the building line would offer some expansion of the town; and
- Planning Policy and practice to northern end of High Street allows the flexible use to switch between retail and residential, and Policy HD03 in the Babergh Local Plan Alteration No. 2 encourage the return to commercial use, where the fabric of the historic buildings and conservation areas is not harmed.

16. Acknowledgements

16.1 Babergh District Council would like to thank the following organisations/ companies for their participation and kindness to staff conducing surveying work, including:

- Town and Parish Councils, Birchall Steel Consultant Surveyors and Horsley Holder Properties Ltd, who participated in our surveys;
- Hawkins Estate Agents, Thomas Cook, Drage and Tozer Opticians, and the Bridge Project, Sudbury;
- Barclays Bank and Adams Wine and Kitchen shop, Hadleigh; and
- Sudbury Chamber of Commerce, The Sudbury Society and The Suffolk Constabulary.

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Appendix

Commercial Floor Space

Table 1 State of the Cities Summary 2000-2004

	Town Centre		Retail				Office			
	Size 2004 (ha)	**Size Increase from 2000 (%)**	**Floorspace 2000 (sq m)**	**Floorspace 2004 (sq m)**	**Change in Floorspace (%)**	**Change in Rateable Value (%)**	**Floorspace 2000 (sq m)**	**Floorspace 2004 (sq m)**	**Change in Floorspace (%)**	**Change in Rateable Value (%)**
Smaller Towns										
Sudbury	21.0	2.44	44600	46600	4.48	5.50	11500	12700	10.43	11.85
Hadleigh	7.8	-2.50	10800	11100	2.78	0.11	3400	3600	5.88	11.02
Braintree	22	-2.2	51700	51500	-0.39	-5.54	18600	12500	-32.80	-32.46
Halstead	12.3	4.24	24200	22700	-6.20	-2.39	3100	3700	19.35	18.95
Haverhill	16.0	4.58	30600	31000	1.31	0.53	8500	8200	-3.53	-2.96
Felixstowe	17.8	11.25	33500	34700	3.58	0.18	5100	5400	5.88	10.01
Newmarket	24.0	-2.04	41600	42100	1.20	1.52	16100	16400	1.86	1.52
Stowmarket	12.5	-12.59	28800	28200	-2.08	-1.95	5500	6700	21.82	47.06
Woodbridge	14.5	0.00	25100	25100	0.00	0.22	3700	3700	0.00	-0.17
Average for Small towns	**16.43**	**0.35**	**32322.22**	**32555.56**	**0.52**	**-0.20**	**8388.89**	**8100.00**	**3.21**	**7.20**
Larger Towns/Cities										
Colchester	70.5	0.00	182400	179200	-1.75	1.51	111900	109900	-1.79	-0.32
Lowestoft	31.5	-2.48	81300	81600	0.37	2.25	48800	49400	1.23	2.14
Ipswich	103.8	3.28	223100	222300	-0.36	1.90	242200	258000	6.52	7.38
Bury St Edmunds	38.8	0.00	96200	107800	12.06	12.79	46400	44200	-4.74	-3.83
Norwich	146.3	0.10	397800	390500	-1.84	-1.51	332800	336800	1.20	0.12
Average for Larger Towns/ Cities	**78.18**	**0.18**	**196160.00**	**196280.00**	**1.70**	**3.39**	**156420.00**	**159660.00**	**0.49**	**1.10**

Based on information from: Department of Communities and Local Government, State of the Cities, 2008
www.socd.communities.gov.uk

Table 2 Edge of Town and Out of Town Centre Locations

Hadleigh Catchment	Location	2002 (sq m)	Feb 08 (sq m)	Unimplemented Feb 08 (sq m)	Total Supply (sq m)	Unimplemented Units (no)
Copdock Mill Interchange	Out of town	17403	17538	0	17538	-
Aldham Mill Road, Hadleigh	Out of town	6489	7169	0	7169	-
Total		**23892**	**24707**	**0**	**24707**	
Sudbury Catchment						
Girling Street, Sudbury	Edge of town	760	760	213	973	extension
Woodhall, Sudbury	Out of town	7546	7546	2397	9943	extension
Shawlands, Northern Road, Sudbury*	Out of town	0	3348	0	3348	
Jades, Northern Road Sudbury**	Out of town	0	3352	0	3352	
Total		**8306**	**15006**	**2610**	**17616**	

* Planning permission existed in 2002 for 3348 sq m

** Planning permission granted in 2002 for 3252 sq m

(Source: Information collected by Babergh District Council Staff)

Use Class

Table 3 Number of Ground Floor Units by Use Class - Sudbury

Sudbury	A1	A2	A3	A4	A5	B1	B2	C1	D1	D2	Sui Generis	Total
1996	153	28	20			9	0	3	9	4	1	227
1997	159	26	21			8	0	2	9	4	1	230
1998	149	26	23			10	0	2	9	4	1	224
1999	164	27	25			14	1	2	8	4	3	248
2007	161	29	28	4	8	12	1	2	10	2	5	262

(Source: Information collected by Babergh District Council)

Table 4 Area of Ground Floor Units by Use Class - Sudbury

Sudbury	A1	A2	A3	A4	A5	B1	B2	C1	D1	D2	Sui Generis	Total
1996	26057	3760	2283			1512	51	895	2911	1074	438	38981
1997	26483	3556	2314			1436	51	462	2911	1074	438	38725
1998	26109	3530	2691			1563		462	2911	1074	438	38778
1999	27147	3652	2656			1808	120	462	2911	823	1138	40717
2007*	26776	3791	2667	1351	566	1621	58	462	2585	249	1781	41907

(Source: Information collected by Babergh District Council)

Table 5 Number of Ground Floor Units by Use Class - Hadleigh

Hadleigh	A1	A2	A3	A4	A5	B1	B2	C1	D1	D2	Sui Generis	Total
1996	60	11	11			11	1	2	7	0	4	107
1997	63	11	12			12	1	2	7	0	4	112
1998	67	10	11			12	1	2	7	0	4	114
1999	63	12	12			13	1	2	6	0	4	113
2007	63	14	7	3	4	14	1	2	5	0	4	117

(Source: Information collected by Babergh District Council)

Table 6 Area of Ground Floor Units by Use Class

Hadleigh	A1	A2	A3	A4	A5	B1	B2	C1	D1	D2	Sui Generis	Total
1996	7453	1519	1546			1104	86	407	796	0	989	13900
1997	7819	1576	1559			1190	86	407	796	0	989	14422
1998	7897	1221	1454			1190	86	407	988	0	989	14232
1999	7631	1656	1599			1186	86	407	690	0	989	14244
2007	8204	1642	746	828	197	1271	86	407	593.5	0	1071	15045.5

NB: 1. Use Classes A4 and A5 were not in use before 2005, they were formerly part of Class A3
2. The 1999 Health Check was under taken in relation to different criteria, it may also include figures for above ground uses.
3. Raw data is available for the period between 2000 and 2006
*Measurements amended to ground floor only measurements as prescribed by PPS6, has a significantly skewed result for B1

(Source: Information collected by Babergh District Council)

Table 7 Number of Ground Floor Units by Use Class - Percentage Change 1997-2007

	A1	A2	A3/A4/A5	B1	B2	C1	D1	D2	Sui Generis	Average
Sudbury	1.26	11.54	90.48	50.00	100.00	0.00	11.11	-50.00	400.00	55.85
Hadleigh	0.00	27.27	16.67	16.67	0.00	0.00	-28.57	0.00	0.00	2.91

(Source: Information collected by Babergh District Council)

Table 8 Area of Ground Floor Units by Use Class - Percentage Change 1997-2007

	A1	A2	A3/A4/A5	B1	B2	C1	D1	D2	Sui Generis	Average
Sudbury	1.11	6.61	98.10	12.88	13.73	0.00	-11.20	-76.82	306.62	31.91
Hadleigh	4.92	4.19	13.60	6.81	0.00	0.00	-25.44	0.00	8.29	1.12

(Source: Information collected by Babergh District Council)

Table 9 Percentage of Each Use Class by Number of Units

		A1	A2	A3/A4/A5	A3	A4	A5	B1	B2	C1	D1	D2	Sui Generis
Sudbury	**1999**	66.13	10.89	10.08				5.65	0.40	0.81	3.23	1.61	1.21
	2007*	61.45	11.07	9.16	10.69	1.53	3.05	4.58	0.38	0.76	3.82	0.76	1.91
Hadleigh	**1999**	55.75	10.62	10.62				11.50	0.88	1.77	5.31	0.00	3.54
	2007*	53.85	11.97	11.97	5.98	2.56	3.42	11.97	0.85	1.71	4.27	0.00	3.42

* Combined figure given for comparison of A3/A4/A5 between 1999 and 2007

(Source: Information collected by Babergh District Council)

Table 10 Existing Floorspace and unimplemented planning permissions

Town Centre	Supply Oct 2007 (sq m)	Unimplemented Feb 08 (sq m)	Total Supply (sq m)	Unimplemented Units (no.)
Hadleigh*	15045.5	67	15112.5	3
Sudbury	50648	289.6	50937.6	5

*the Babergh Local Plan allocates an additional 2500 sq m for convenience goods retail

(Source: Information collected by Babergh District Council)

Table 11 General Factors

	Total length of shop frontage (m)	Average/ shop width	Number of regional/ national operators	% of regional/ national operators	Unit size range
Sudbury	2256.00	8.61	61	23.28	15-2862 sq m
Hadleigh	987.10	8.44	15	12.82	7-1476 sq m

(Source: Information collected by Babergh District Council)

Table 12 Non- Retail Floorspace, which is considered to be an attraction to a place.

Hadleigh Catchment	**Location***	**March 08 (sq m)**
Calais Street/Pykenham Park	edge of town	12500
Hadleigh High School**	out of town	73500
Hadleigh Swimming Pool	out of town	733
Kersey Mill complex (leisure/conference)	out of town	410
Total		**87143**
Sudbury Catchment		
Gainsborough's House Museum	edge of town	346
Belle Vue Park & Siam Park	edge of town	20500
Leisure Centre	edge of town	2744
Theatre	out of town	320
Cricket grounds	out of town	12700
Rowing (boat house)	out of town	262
Tennis	out of town	2188
Rugby ground	out of town	27000
Bowls	out of town	3656
10 pin bowling	out of town	1430
Football ground	out of town	36200
Great Cornard Upper School**	out of town	123450
Sudbury Upper School**	out of town	88100
Total		**318896**

* Note boundaries for the town centre are drawn tightly around the retail core.
**joint facilities precise measurements not possible

(Source: Information collected by Babergh District Council)

Table 13 Vacancy (Town Centre)

		Total no. of shops	Vacant	% vacant	Total floor space (sq m)	Total floor space vacant (sq m)	% floor space vacant
Sudbury	Prime	45	0	0.00	8741	0	0.00
	Secondary	217	13	5.99	41907	958	2.29
	Total	**262**	**13**	**4.96**	**50648**	**958**	**1.89**
Hadleigh	Prime*	42	3	7.14	6758.5	436	6.45
	Secondary	75	9	12.00	8287	781	9.42
	Total	**117**	**12**	**10.26**	**15045.5**	**1217**	**8.09**

*A unit of 234 sq m was let shortly after the survey was undertaken. (Overall vacancy rate decreases to 6.53%)

(Source: Information collected by Babergh District Council)

Table 14 Yields

The yields quoted in the table are 'all risk yields' calculated by dividing the annual rent, as though it had been received as a single sum at the year end, by the capital value or sale price of the property. The 'all risks yield' is a simple benchmark which the property market uses to assess the comparative attractiveness of different shopping centres. It is the ratio of rental income to capital value and is expressed in terms of the open market rent of a property as percentage of the capital value.

	1/4/01	1/10/01	1/4/02	1/10/02	1/4/03	1/1/04	1/7/04	1/1/05	1/7/05	1/1/06	1/7/06	1/1/07	1/7/07
Cambridge	5.25	5.25	5.25	5.25	5.5	5.25	5.5	5.25	5.25	5.25	5.25	5.25	5
Bury St Edmunds	5	5.25	5.25	5	5	5.25	5.25	5	5	5	5.25	5.25	5
Newmarket	7.75	8	7.75	7.5	7.5	7.25	6.75	6.75	6.75	6.75	6.5	6.5	6.25
Haverhill	8.5	8.75	8.5	8	7.75	7.75	7.75	7.75	7.75	7.5	7.25	7.25	7
Colchester	6	6	6	6	6	6	6	5.5	5.25	5	4.75	4.75	4.75
Ipswich	4.25	4.5	4.5	4.25	4	4	4.25	4.25	4.75	4.75	4.75	4.75	4.75
Lowestoft	7.5	7.75	7.75	7	6.75	6.75	6.75	6.75	6.75	6	6	6.00	5.75
Felixstowe	8	8.25	8.25	7.5	7.5	7.25	7.25	7.25	7.25	7	6.75	6.50	6
Sudbury	7.75	8	7.75	7	6.75	6.75	7	6.75	6.75	6.5	6	6.00	5.75
Stowmarket	8.5	8.75	8.75	8	7.75	7.5	7.5	7.5	7.5	7.25	7	7.00	6.75
Norwich	5	5	5	5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5

(Source: http://www.voa.gov.uk/publications/property_market_report/pmr-jul-07/shopping-yields.htm#retail_centre)

Pedestrian Flows

Sudbury

Table 15 Summary by Day

	9.00-9.30	**9.30-10.00**	**10.00-10.30**	**10.30-11.00**	**12.00-12.30**	**12.30-1.00**	**1.00-1.30**	**1.30-2.00**	**3.00-3.30**	**3.30-4.00**	**4.00-4.30**	**4.30-5.00**	**Total**
Saturday date	868	871	1297	1298	2051	2037	1970	1813	1298	1333	995	773	16604
Monday date	935	1211	1240	1309	1304	1433	1238	1155	1001	1121	982	829	13758
Friday date	864	991	1052	1052	1332	1202	1461	1263	1315	1299	1174	957	13962
Total	2667	3073	3589	3659	4687	4672	4669	4231	3614	3753	3151	2559	44324
Average Pedestrian Flow/day	889	1024	1196	1220	1562	1557	1556	1410	1205	1251	1050	853	14775

Table 16 Summary by Location

		9.00-9.30	9.30-10.00	10.00-10.30	10.30-11.00	12.00-12.30	12.30-1.00	1.00-1.30	1.30-2.00	3.00-3.30	3.30-4.00	4.00-4.30	4.30-5.00	Total
North Street	Saturday/ date	406	356	523	459	857	897	935	853	543	670	510	406	7415
	Monday/date	409	493	501	581	586	634	492	459	493	600	443	387	6078
	Friday/date	386	436	464	320	578	596	641	541	619	622	561	430	6194
	Total	1201	1285	1488	1360	2021	2127	2068	1853	1655	1892	1514	1223	19687
Market Hill (north)	Saturday/ date	304	333	513	565	866	830	775	723	563	474	366	256	6568
	Monday/date	306	494	450	453	463	539	522	473	332	355	343	332	5062
	Friday/date	319	358	364	459	494	448	524	440	414	462	403	334	5019
	Total	929	1185	1327	1477	1823	1817	1821	1196	1309	1291	1112	922	16209
Market Hill (south)	Saturday/ date	158	182	261	274	328	310	260	237	192	189	119	111	2621
	Monday/date	220	224	289	275	255	260	224	223	176	166	196	110	2618
	Friday/date	159	197	224	273	260	158	296	282	282	215	210	193	2749
	Total	537	603	774	822	843	728	780	742	650	570	525	414	7988
Total Flow		**2667**	**3073**	**3589**	**3659**	**4687**	**4672**	**4669**	**3791**	**3614**	**3753**	**3151**	**2559**	**43884**
Average Pedestrian Flow/day		**889**	**1024**	**1196**	**1220**	**1562**	**1557**	**1556**	**1264**	**1205**	**1251**	**1050**	**853**	**4876**

(Source: Information collected by Babergh District Council)

Hadleigh

Table 17 Summary by Day

	9.00-9.30	9.30-10.00	10.00-10.30	10.30-11.00	12.00-12.30	12.30-1.00	1.00-1.30	1.30-2.00	3.00-3.30	3.30-4.00	4.00-4.30	4.30-5.00	Total
Saturday 26/01/08	181	242	340	390	444	379	340	339	303	355	226	171	3710
Tuesday 29/01/08	239	289	294	349	351	357	309	285	286	272	225	192	3448
Friday 01/02/08	335	342	405	433	479	374	391	312	371	346	260	223	4271
Total	755	873	1039	1172	1274	1110	1040	936	960	973	711	586	11429
Average Pedestrian Flow/day	252	291	346	391	425	370	347	312	320	324	237	195	3810

Table 18 Summary by Location

		9.00-9.30	9.30-10.00	10.00-10.30	10.30-11.00	12.00-12.30	12.30-1.00	1.00-1.30	1.30-2.00	3.00-3.30	3.30-4.00	4.00-4.30	4.30-5.00	Total
High Street North	Saturday 26/01/08	73	114	139	168	220	155	176	165	140	163	112	70	1695
	Tuesday 29/01/08	126	133	150	181	188	198	184	157	154	144	120	111	1846
	Friday 01/02/08	140	183	187	210	189	172	180	159	215	186	137	123	2081
	Total	339	430	476	559	597	525	540	481	509	493	369	304	5622
High Street South	Saturday 26/01/08	108	128	201	222	224	224	164	174	163	192	114	101	2015
	Tuesday 29/01/08	113	156	144	168	163	159	125	128	132	128	105	81	1602
	Friday 01/02/08	195	159	218	223	290	202	211	153	156	160	123	100	2190
	Total	416	443	563	613	677	585	500	455	451	480	342	282	5807
Total Flow		**755**	**873**	**1039**	**1172**	**1274**	**1110**	**1040**	**936**	**960**	**973**	**711**	**586**	**11429**
Average Pedestrian Flow/day		**252**	**291**	**346**	**310**	**425**	**370**	**347**	**312**	**320**	**324**	**237**	**195**	**1905**

(Source: Information collected by Babergh District Council)

Car Parking

Table 19 Sudbury

	Spaces	Disabled	Parent/Toddler	Motorcycle	Coach/Lorry	Taxi	Total
North street	186	5	4	1	0	0	196
Girling Street	67	4	4	3	0	0	78
Gt Eastern Road (Roys)	256	10	4	0	0	0	270
Station Road (Kingfisher)	260	6	4	0	12	0	282
Station Road (Railway Station)	132	3	4	0	0	2	141
Stour Street	35	1	0	0	0	0	36
Quay Lane	19	0	0	0	0	0	19
Mill Lane	21	2	0	0	0	0	23
Total	976	31	20	4	12	2	1045

(Source: Information collected by Babergh District Council)

Table 20 Hadleigh

	Spaces	Disabled	Parent/Toddler	Motorcycle	Coach/Lorry	Taxi	Total
Magdalen Road	166	3	4	1	10	0	184
Stone Road	30	3	4	0	2	0	39
High Street(Bank)	45	3	4	0	0	0	52
Maiden Way	6	1	2	0	0	0	9
Toppesfield Hall	16	3	2	0	0	0	21
Railway Walk	5	0	0	0	0	0	5
Total	268	13	16	1	12	0	310

(Source: Information collected by Babergh District Council)