Babergh District Council

Sudbury and Hadleigh

Town Centre Health Check

2011 Update

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1. Introduction

1.1 Babergh District Council has been undertaking town centre health checks (TCHC's) since 1995. The last full health check to be published by the Council dates from 2008. In 2010 an update document was prepared in draft form but this was never published. The purpose of this latest update is to take the 2010 document forward and, with the use of additional data gathered during April and October of this year, provide as up-to-date a picture as possible on the health of the districts two main towns – Sudbury and Hadleigh.

1.2 Sudbury (in combination with Great Cornard) forms the largest town in the district. Situated at the western edge of Babergh, and roughly equidistant from Bury St Edmunds and Braintree, its main retail offer is concentrated around Market Hill, King Street, North Street and in an area immediately adjacent to the Kingfisher Leisure Centre. The town's historic core, mix of national and local high street names and lively market make it an attractive place to both visit and shop. (See maps 1 and 2).

1.3 Hadleigh is more centrally located within the district, lying approximately mid-way between Sudbury and Ipswich. The town centre is distinctly linear in form, its main retail offer being concentrated along the High Street. Like Sudbury, its historic core and mix of small independent retailers – many of whom sell locally grown produce - make it an attractive place to shop and visit. (See maps 1 and 3). *Please note that the town centres as shown on maps 2 and 3 do not correlate precisely with those as defined in the adopted Babergh Local Plan 2006 and reference to the latter is necessary in relation to any town planning and development matters (see :*

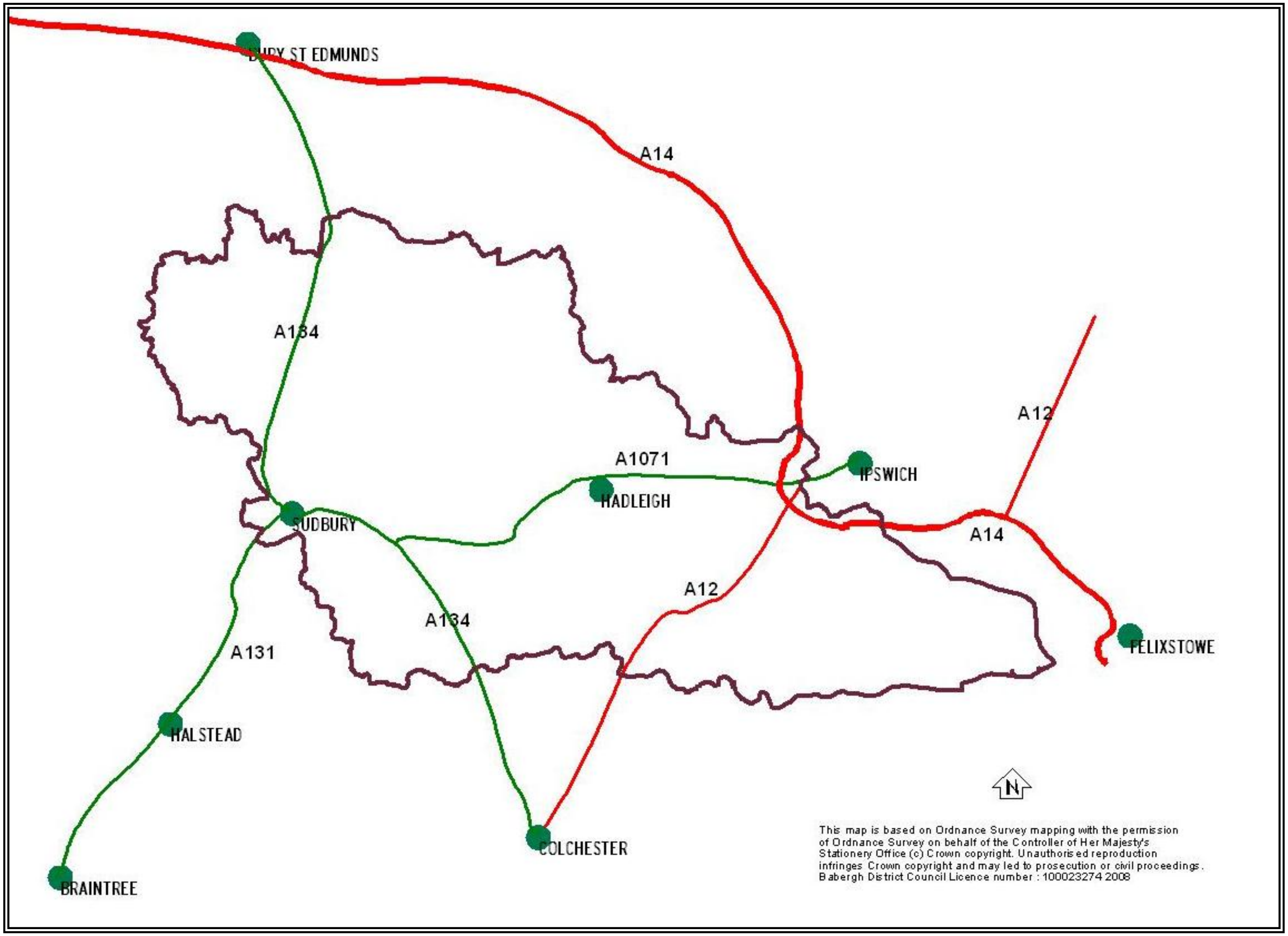
http://www.babergh.gov.uk/babergh/LocalPlan

1.4 The hinterland of both towns is predominantly rural in nature and includes a number of villages and hamlets that look to these towns for a wide range of services and facilities.

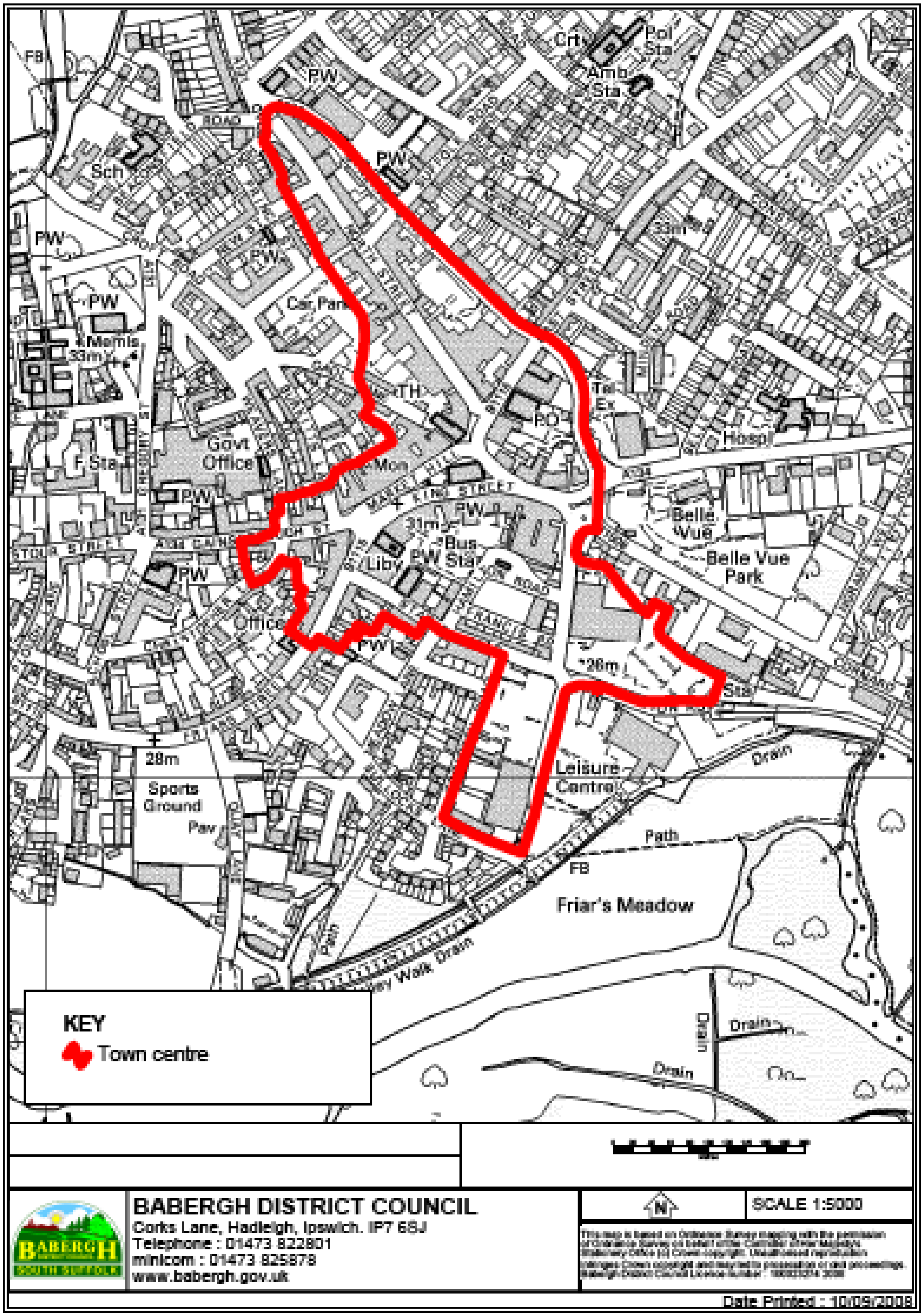
1.5 In addition to carrying out its own monitoring programme, the Council also commissioned specialist retail consultants Colliers CRE to carry out a full investigation into the retail capacity of Hadleigh and Sudbury. This retail study (which dates from 2002) helped inform the development of the Babergh Local Plan Alteration No.2, which was adopted by the Council in June 2006.

1.6 To support the preparation of the new local planning framework, hereafter referred to as the Babergh Development Framework (or BDF) and, in particular, to ensure a robust evidence base to support retail policies, the Council again commissioned Colliers CRE to undertake a 2008 Retail Study. This study provided an overview of the health, as well as the relative strengths and weaknesses of the Sudbury and Hadleigh town centres and assessed their present and future roles within the District's shopping hierarchy. A copy of this study can be accessed via the Babergh District Council website under the Studies / BDF Evidence section at: www.babergh.gov.uk/babergh/ldf

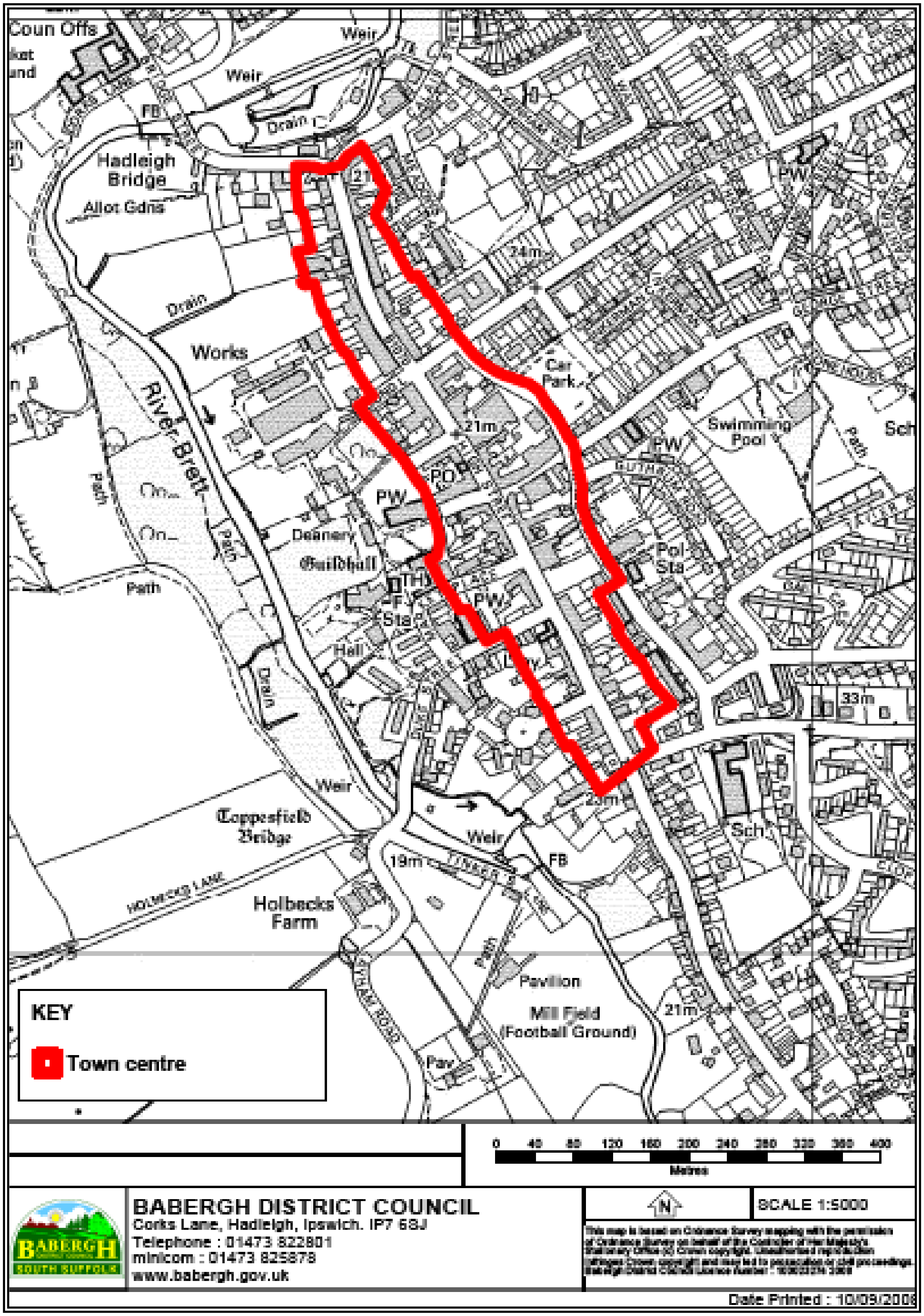
Map 1 - The Babergh District



Map 2 - Sudbury Town Centre Map



Map 3 - Hadleigh Town Centre



2. Planning Policy Statement 4: Planning for Sustainable Economic Growth (PPS4)

2.1 PPS4 was introduced in December 2009, and it is aimed at, inter alia, promoting the vitality and viability of town and other centres as important places for communities. 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. PPS4 formalises the way in which a town centre health check is undertaken. This report follows the new methodology set out in PPS4 (in broad terms) and, therefore, there are some variations between this report and previous health check reports.

2.2 The table below sets out the requirements for a town centre health check as contained in Annex D of PPS4 and addressed in this report:

Factor	Measurement
A1: Diversity of main town centre uses (by number, type and amount of floorspace)	The amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and, hotels
A2: The amount of retail, leisure and office floorspace edge-of-centre and out-of-centre locations	
A3: Potential capacity for growth or change of centres in the network	Opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development
A4: Retailer representation and intentions to change representation	Existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation (further information contained in 2008 Retail Study)
A5: Shopping rents	Pattern of movements in Zone A rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window)
A6: Proportion of vacant street level property and the length of time properties have been vacant	Vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators
A7: Commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental)	Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care

A8: Land values and the length of time key sites have remained undeveloped	Data on changes in land value and how long key town centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions
A9: Pedestrian flows (footfall)	A key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening, who are available for businesses to attract into shops, restaurants or other facilities
A10: Accessibility: ease and convenience of access by a choice of means of travel	The quality, quantity & type of car parking; the frequency and quality of public transport services and the range of customer origins served; and, the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions
A11: Customer and residents' views and behaviour	Regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre. This information could also establish the degree of linked trips. (See 2008 Retail Study for further information).
A12: Perception of safety and occurrence of crime	Should include views and information on safety and security, including from the threat of terrorism, and where appropriate, information for monitoring the evening and night-time economy
A13: State of the town centre environmental quality	Should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces)
Complimentary Town Centre Uses: Leisure, entertainment facilities, and more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls)	Should set out the type, number and scale of leisure developments to be encouraged, taking account of their potential impact, including the cumulative impact, on the character and function of the centre, anti-social behaviour and crime, including considering security issues raised by crowded places, and the amenities of nearby residents

3. Diversity

Diversity of main town centre uses (by number, type and amount of floorspace): The amount of space in use for different functions – such as offices; shopping; leisure, cultural and entertainment activities; pubs, cafes and restaurants; and hotels in:

The amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations.

3.1 The Department of Communities and Local Government's States of the Cities Reports, 2008 (an interactive report that was previously accessible via the www.communities.gov.uk website) detailed changes in economic competitiveness between 2000 and 2004, with reports available for both Sudbury and Hadleigh (see Table 1 in the Appendix). Figures available included the number of employees, floorspace and rateable value in various commercial sectors within the two town centre.

3.2 Table 1 showed that, between 2000 and 2004, the area of Sudbury town centre grew in size by 2.44% while that of Hadleigh reduced by 2.50%. The average size of smaller towns in areas adjacent to Babergh grew by 0.35% over the same period. The reduction in overall size in Hadleigh was compensated for through with the intensification of uses and extension of premises within the town centre. This was despite additional out of town and edge of town floorspace (see Table 2 in the appendix) and the growth in general in on-line shopping and on-line grocery delivery.

3.3 Tables 3 to 9 show annual and summarised data on floorspace and number of units by Use Class Order.

3.4 Table 11 lists non-retail floorspace. It 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 leisure floorspace of Sudbury is just under 319,000 sqm which is considered a good leisure offer. Hadleigh has approximately 87,000 sqm of leisure facilities, although the types of leisure uses on offer are more restrictive than at Sudbury.

4. Potential capacity for growth or change of centres in the hierarchy

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

Hadleigh

4.1 The Babergh Local Plan identifies the need for, and allocates land for 2,500 sq m of additional floorspace for convenience goods (a supermarket) in Hadleigh. A planning application for a 3,197 sqm supermarket on this allocated site was considered by the Council but the application was refused. The future use of the site remains under consideration. If a superstore does come forward on this site it will result in a relatively substantial expansion of the town centre area. Elsewhere, due to the nature of the town centre opportunities for physical expansion remain generally limited. Map 5 provides an indication of potential opportunities, although this only represents the results of a limited level of analysis and further work would be required in this regard.

Sudbury

4.2 Sudbury town centre is much larger in area and whilst constrained in some respects, the opportunities for expansion also appear much greater. A significant opportunity for expansion, consolidation and improvement of the town centre and its offer exists at the site around the bus station (allocated in the 2006 Local Plan). A brief for its redevelopment - The Hamilton Road Quarter Sudbury, Development Brief SPD - has been finalised and adopted by the Council and work to realise a comprehensive scheme at this location is underway.

4.3 A planning application for a new supermarket on Cornard Road is also under consideration at present. If approved, this would result in what would effectively be an expansion of the town centre area. Other opportunities to grow, develop and improve Sudbury town centre will be explored and promoted where appropriate and beneficial.

4.4 Within Babergh's emerging Core Strategy (Submission Draft, October 2011), policies 'CS3: Strategy for Sudbury / Great Cornard', 'CS4: Strategy for Hadleigh' and 'CS11: Town, Village and Local Centres' provide further guidance on future planning / growth aspirations for these two areas. Sudbury in particular has the potential to develop and evolve / diversify an evening / night-time economy that focuses on cultural and leisure activities (theatres, cinemas, restaurants etc.) that would enhance the 'tourism' offer.

4.5 Further information on potential capacity for growth can also be found in the Recommendations and Opportunities section at the end of this report. Also map 4 provides a basic indication of potential town centre expansion opportunities, although only as a result of a very basic level of assessment. Further work is required in this regard and it is considered that this would be beneficial in respect of Sudbury town centre and its future planning.

5. Retailer representation and intentions

Existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce their representation

5.1 In 2010, questionnaires were sent out to local and national land agents to request information regarding their knowledge on, amongst other things, the intentions of retailers. Only three completed responses were received. Given the small sample size it was difficult to draw any firm conclusion but, 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 do not allow for the requirements of interested retail companies, who would wish to come to the towns. It was not possible to carry out this questionnaire survey during 2011 but there is a known interest from Tesco's as a retailer for Hadleigh and from Sainsbury's for a retail presence in Sudbury.

5.2 Further work on retail aspirations was carried out as part of the 2008 Retail Study, by specialist consultants. See:

http://www.babergh.gov.uk/planning-and-building/planning-policy/local-development-framework/background-studies-evidence-base/town-centres-and-retailing/

6. Shopping rents

Pattern of movements in Zone A rents within primary shopping areas (i.e. the rental value for the first 6 metres depth of floorspace in retail units from the shop window)

6.1 Three responses were received from the last survey of local land agents. Whilst there was some disagreement within the responses received, overall it appeared that Sudbury's commercial rental values for retail, office and leisure premises have all remained relatively static. Over the same period, it appears that Hadleigh too has experienced static commercial rental values for all of retail, office and leisure premises.

	Prime Retail Rental Value (£ / month)	2002 - 2008 increase
Sudbury	68	-3% (Decrease)
Hadleigh	30	-6% (Decrease)

(Source: local consultants)

6.2 The Valuation Office Agency (VOA) publishes property shop and office town centre rental figures for the major centres. The most recent data set was valid for the year to January 2011. The table below shows data for the nearest major centres - Cambridge and Norwich – for the last two years:

Prime Rent Value (£ / sqm / annum)	Year to Jan 2010	Year to Jan 2011
Cambridge - Shops	£3,000	£2,900
Norwich - Shops	£2,000	£1,950
Cambridge – Office	£230	£245
Norwich - Office	£140	£140

Jan 2010 data available via National Archives website:
http://webarchive.nationalarchives.gov.uk/20110320170052/http://www.voa.gov.uk/publications/property_market_report/index.htm

Jan 2011 data sourced from: http://www.voa.gov.uk/dvs/propertyMarketReport/index.html

6.3 Rental data for the smaller towns in and around Suffolk (which included Ipswich and Colchester) ceased to be published in 2008, meaning that it is no longer possible to carry out any direct comparisons. This historical data can still be found in Table 21 of the appendix.

7. Proportion of vacant street level property and the length of time properties have been vacant

Vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators

7.1 Table 13 in the appendix details the current (Oct 2011) vacancy rates for both towns. There are 248 ground floor units in Sudbury, 1 of the 44 prime units is vacant (2.27%) and 12 of the 204 secondary units are vacant (5.88%). This gives an overall rate of 5.24% vacancy.

7.2 There are 109 ground floor units in Hadleigh. None of the 42 prime units are vacant but 4 of the 67 secondary units are vacant (5.97%). This gives an overall rate of 2.46% vacancy.

7.3 It is generally acknowledged by nationwide retail studies that vacancy rates of between 5% and 8% (the national average) 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. Whilst Sudbury and Hadleigh town centres fall within this band, the indications are that, locally, there are too few units available or that these are too small in size.

7.4 It is difficult to draw any further direct comparisons with nearby town centres but Ipswich had a 9.2% vacancy rate in 2005 (October 2005 retail study), Colchester 10% in March 2008, Stowmarket 7% in 2007 (May 2007 Retail Study Report) and Bury St Edmunds 3.7% in September 2007. The rather low vacancy rate in Bury St Edmunds had been aided by the opening of The Arc mixed use development in March 2009, which provided an operating base for a national chain department store and 35 shops / restaurants.

8. Commercial yields on non-domestic property

Demonstrates the confidence of investors in the long-term profitability of the centre for retail, office and other commercial developments. This indicator should be used with care.

8.1 "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

8.2 The yields for Cambridge, Bury St Edmunds, Ipswich, and Norwich have remained stable over the 7 year period (2001 – 2008), as measured by the VOA, and range from 5.00% in Ipswich and Bury St. Edmunds to 5.75% in Cambridge. The yields for the remaining towns have improved over the period, improving their attractiveness to investors. Sudbury's yield has dropped from 8% in October 2001 to 5.75% in July 2008 and is lower than that of Newmarket, Haverhill and Stowmarket; indicating a better proposition for investment (see Table 14 in the Appendix).

8.3 Hadleigh is too small to form part of the national picture; however local consultants have indicated that the yield was 6.5% in July 2007, and that this has remained static from the period July 2007 to September 2010. The consultants also indicated that Sudbury has experienced a slight decline in yield, from 5.75% in July 2008 to 5.5% in September 2010.

9. Pedestrian flows (footfall)

9.1 A count of pedestrian flow in Sudbury and Hadleigh was undertaken in 2008 on specific dates between the hours of 9am - 11am, 12am - 2pm, and from 3pm - 5pm in order to monitor the numbers of pedestrians in each town. This remains the most up-to-date local data on footfall and was a variation on the previous pattern of survey (1999) which was undertaken at a time when more staff resources were available. Irrespective of those changes, the 2008 data showed that the number of pedestrians in the town centres had increased. It has not been possible to carry out a new pedestrian footfall surveys for this report due to insufficient staff resource availability.

<u>Sudbury Town Centre (2008)</u>

9.2 The pedestrian flow or footfall was counted at three locations: the northern and southern sides of Market Hill and on North Street. The surveys were undertaken on Saturday 19th, Monday 21st and Friday 25th January 2008, to assess variation in numbers across the week.

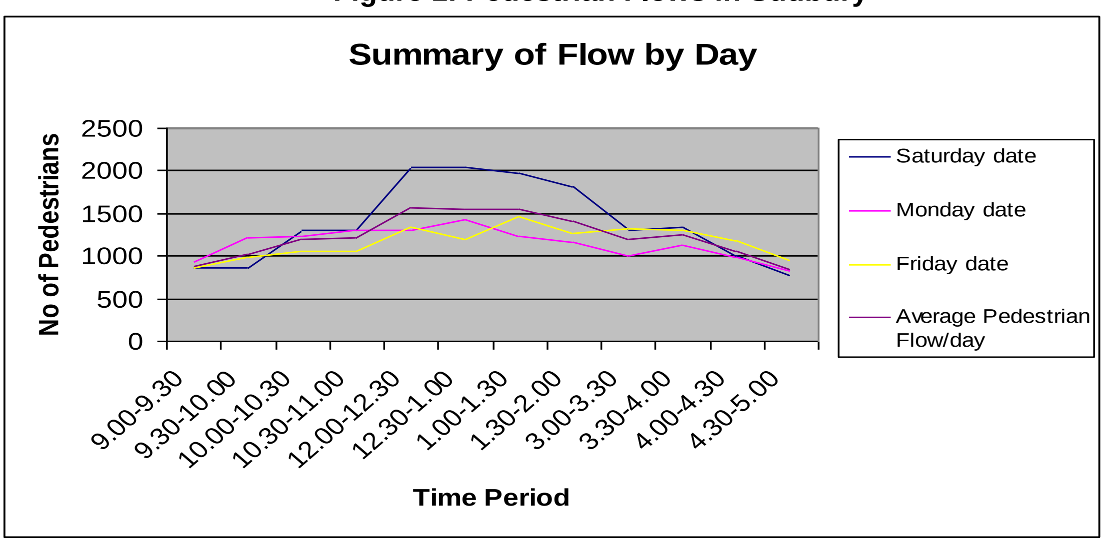
9.3 At that time, markets were held in Sudbury on Thursdays and Saturdays, with a monthly farmers market in St Peter's Church on Market Hill. The latter was in operation on the day of the survey between 9am and 1pm. Other one-off events are also held in the town, such as a French Market and the Christmas lights switch on.

9.4 In 2008, the peak flow in Sudbury was on the Saturday on North Street, where there were 935 pedestrians between 1.00pm and 1.30pm.

9.5 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.

9.6 The flow generally shows a peak at lunch time, then a steady drop followed by 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 Table 15 and Table 16 in the appendix.

Figure 1: Pedestrian Flows in Sudbury



(Source: Research completed by Babergh District Council)

Hadleigh Town Centre

9.7 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 surveys were undertaken on Saturday 26th, Tuesday 29th January and Friday 1st February 2008, to assess the variation in numbers across the week, see below.

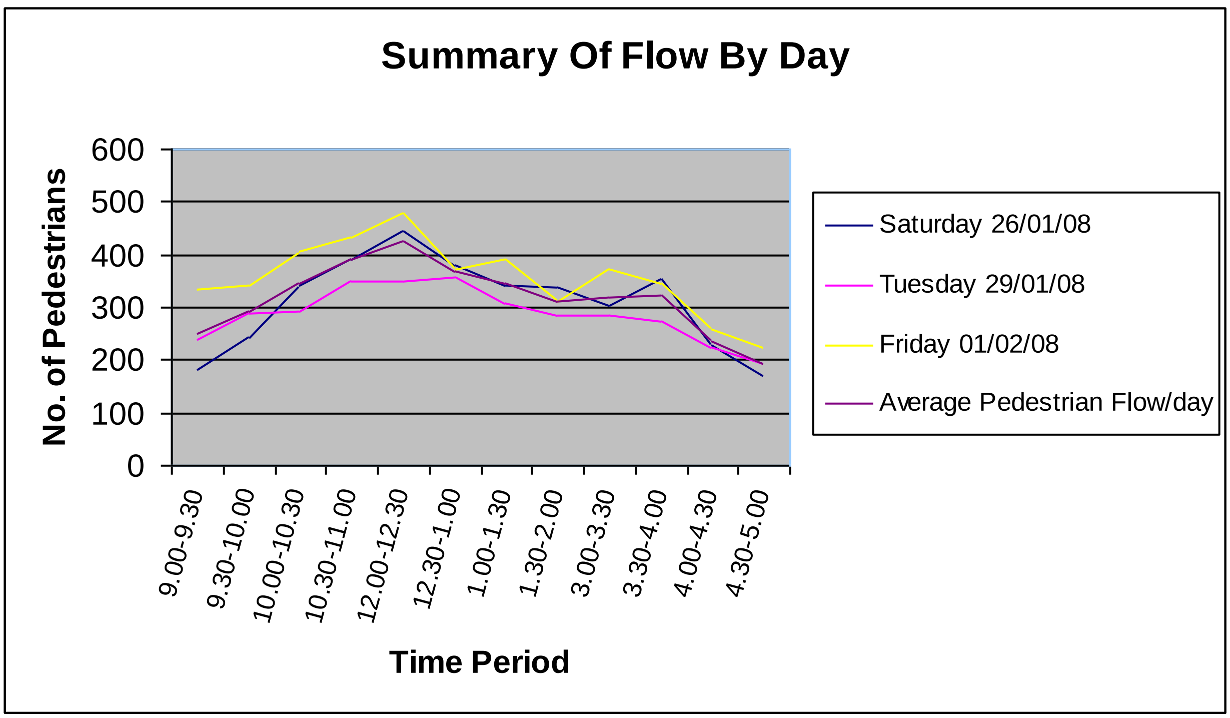
9.8 At that time, a market was held in Hadleigh on a Friday (in Market Place) which usually closed by 1pm or 2pm. Other occasional events that are held in the town include a May agricultural show and the Christmas light switch on.

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

9.10 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.

9.11 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 Table 17 and Table 18 in the appendix.

Figure 2: Pedestrian Flows in Hadleigh



(Source: Research completed by Babergh District Council)

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

The quality, quantity and type of car parking

10.1 Babergh District Council currently operates nine public car parks in Sudbury (three short stay and six long stay) and six car parks in Hadleigh (three short stay, two long stay and one short / long stay). In October 2010 new long-stay parking charges were introduced at two long stay car parks in Sudbury and at one long stay car park in Hadleigh. A subsequent review of the way in which long-stay car parking spaces were being used was carried out by the Council which resulted in further options for long-stay car park users being introduced in September / October 2011. Parking is currently free in the other car parks in Sudbury and Hadleigh, although users of these car parks are required to place a timed ticket in their windscreen to ensure a turnover of vehicles. Tables 19 and 20 (in the appendix) provide a breakdown of available parking spaces.

10.2 The total number of off-street parking spaces in Sudbury town centre and edge of centre locations is 1085, including 32 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.

10.3 The total number of off-street parking spaces in Hadleigh town centre is 312, including 20 spaces reserved for disabled badge holders. In addition to this parking on High Street is available. In addition to Hadleigh's public car parks, 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.

10.4 The Council's website carries information on the location of car parks across the district as well as information on parking charges, the number and type of parking bays and information on parking restrictions. This can be accessed from the home page via the Your Community section. See http://www.babergh.gov.uk/your-community/car-and-lorry-parks/

The frequency and quality of public transport services and the range of customer origins served

10.5 The central bus station in Sudbury is not particularly large, or attractive, and is showing signs of its age. Working with Suffolk County Council, the Council prepared a Development Brief Supplementary Planning Document (SPD) on the Hamilton Road Quarter, Sudbury which was adopted by the Council in February 2010. Its purpose is to provide clear guidance for the appropriate comprehensive redevelopment of the area covered by policy SD06 of the Babergh Local Plan – an area that includes the present day bus station.

10.6 The bus station is an important part of Sudbury's infrastructure, providing a sustainable means of getting to the town for many people. The layout and facilities are acknowledged as tired and funding exists to provide improvements to bring the station up to current standards. The location has the advantage of being very close to the town centre, making much of the town accessible within the 400m walking distance generally accepted as the optimum walking distance from facilities. The location is, however, a poor one. This is because it is difficult to find, in an area that does not read as a principle route or street. The movements of both busses and other vehicles through the station dominate pedestrian flows and access making the operation not particularly user friendly.

10.7 The relationship of the bus station to the railway station has potential to act as an interchange for connecting further journeys. The present location of the bus station disadvantages the interchange potential and this is again because the bus station is hidden from legible routes or connections.

10.8 As of November 2011 there are 17 bus services that originate, terminate or route through (stop in) Sudbury. These services not only connect the two town centres with each other but also provide links to other surrounding towns (such as Ipswich, Colchester and Bury St Edmunds) as well as a number of surrounding villages.

10.9 In Hadleigh, the stop along Magdalen Road (to the rear of the Co-operative supermarket) serves as the main bus stop. As of November 2011 there are 10 bus services that originate, terminate or route through this stop in) Hadleigh and 17 bus services that originate, terminate or route through (stop in). Again, services from here not only connect Hadleigh with Sudbury but also provide a vital link to other surrounding towns and villages.

10.10 In addition to the scheduled services mentioned above there are also a number of community-based or 'on-demand' bus services that operate across the district. Suffolk County Councils own 'Suffolk on Board' website: (see link below) carries details of the Suffolk Links Demand Responsive Transport (DRT) services which offer a range of end of end, or onward connection services. Three Suffolk Link services cover the north and east of Babergh (Suffolk Links Brett, Suffolk Links Buzabout and Suffolk Links Cosford) while the Sudbury Town Area Rural Transport (S.T.A.R.T.) service operates within an eight mile radius of Sudbury.

(Link: http://www.suffolkonboard.com/suffolk_links_demand_responsive_transport)

10.11 There is no train station in Hadleigh. The Sudbury branch line runs to Marks Tey - a mainline station on the Norwich to London line, providing onward access to Chelmsford, Colchester, Ipswich, Norwich and London. At present, there are 19 services a day (Mon - Fri) between Sudbury and Marks Tey. This reduces to 18 services on Saturdays' and 15 on Sunday's. (Source: http://www.traveline.org.uk)

Quality of provision for pedestrians

10.12 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.

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

Quality of provision for cyclists

10.14 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 while undertaking the pedestrian flow surveys (in 2008), however this may be the result of landform or that there is a good bus service or that there are sufficient cycle parking positions.

10.15 There is a low level because of provision for cyclists in Hadleigh despite good use of bicycles (as noted from the 2008 pedestrian flow survey). There is an opportunity to encourage cycle use through the provision of cycle stands.

Quality of provision for the disabled

10.16 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

10.17 Navigating around Sudbury's one-way system 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.

10.18 Map information boards have been a feature of Sudbury for several years. These were replaced / updated during 2008-09.

10.19 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 6 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.

10.20 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).

11. Customer and residents' views and behaviour

Parish Council Survey

11.1 In September 2010 Babergh District Council forwarded a survey to selected Town & 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 Town Centre</u>

11.2 A total of five responses were received from the nine Town & Parish Councils consulted about Hadleigh town centre. The responses suggested that free car parking and the fact that the town is a local key service centre are the most likely reasons why local residents would choose to shop in Hadleigh. They also thought it was likely that local residents would choose to shop in Hadleigh due to its variety of specialist shops and the amount of these which are occupied. The weekly market, the town's cleanliness and attractive buildings, and the general lack of traffic and pedestrian congestion were also listed as big draws for Hadleigh. An additional reason given for shopping in Hadleigh was its friendly atmosphere.

11.3 On the negative side, they identified the lack of leisure activities, lack of good public transport and cycling facilities, the small size of the town's footpaths and the lack of good wheelchair access around the town as particular issues.

Sudbury Town Centre

11.4 Responses were received from all eight Town & Parish Councils who were consulted about Sudbury town centre. The results showed the main reason why people were attracted to shop in the town was its free car parking. Other likely reasons for shopping here were: its specialist shops, its variety of shops, the amount of occupied shops, its cleanliness, its attractive buildings, its locality, the market, its good size of footpaths, its good public transport services, and its being equipped for wheelchair users. The parks, other public spaces, its supermarkets, and variety of eating establishments were also seen as positive factors.

11.5 Reasons for not visiting Sudbury included the amount of peak time traffic, pedestrian congestion, lack of cycling facilities and the lack of leisure facilities. Other factors included the reduced range of shops such as attractive cafes / wine bars and young fashion outlets, the loss of smaller independent shops to larger high street chains, and the attraction of the larger shopping centres at Bury St. Edmunds, Colchester and Ipswich.

Retail Capacity Study 2002: Sub-Regional Shopping Patterns

11.6 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

11.7 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

11.8 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

11.9 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.

Sudbury Zone

11.10 The district retains only 36% of its comparison goods spend. To this total, the district attracts an estimated in-flow of £77 million (primarily 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 & Essex.

Hadleigh Zone

11.11 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.

12 Perception of safety and occurrence of crime

Should include views and information on safety and security, including from the threat of terrorism, and where appropriate, information for monitoring the evening and night-time economy.

Perceptions and crime levels

12.1 Babergh as a district has very low levels of crime when compared to national and regional averages. Within that picture however Babergh's Community Safety Partnership, though its annual strategic review of crime and disorder, has indentified town centres as key locations for the vast majority of crime in the district. This is supported by County-wide research which shows the offences of criminal damage and violent disorder as the priorities for tackling crime and disorder. Collectively these offences in Babergh account for 37% (1560 incidents) of all reported crime in the 12 months ending March 2011. Further research has shown that the majority of these offences take place in the town centres of Sudbury and Hadleigh and within that Sudbury is a particular priority. Temporal analysis shows that these offences are particularly linked to the night-time economy, pubs and clubs, in these areas and this picture is replicated County-wide. Tackling town centre disorder is both a District and County-wide priority, these priorities being driven by the Community Safety Partnership's strategic analysis and action plan. Specific tasks groups, including one for Babergh, therefore exist and are making some headway. Public, i.e. visible disorder has a particular impact on the fear of crime and in the context of these locations an impact on the safety of town centres.

Associated Development issues

12.2 Joint Action with the Police can help manage the issue; however the Community Safety Partnership has a long term goal in changing the mix of social outlets available within the night-time economy, as the majority of these are related specifically and exclusively to the consumption of alcohol. The strategic assessment identifies irresponsible and excessive alcohol use as a key driver for these crime types. Providing alterative social outlets would both increase the options available to those using the night-time economy and change the mix of people in the town centre - diluting the drinking culture and thereby having an impact on feelings of safety.

13. State of the town centre environmental quality

Should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors such as trees, landscaping and open spaces)

13.1 A local environmental quality cleanliness survey is carried out in the district on a quarterly basis. This survey, which includes inspections of the main retail and commercial streets in Sudbury and Hadleigh, measures the percentage of streets that meet required levels of cleanliness. The most recent inspections (completed in July 2011) achieved the required standards level for all streets in the town centres.

13.2 The following indicates the number of town centre litter, dog fouling and graffiti reports received by Babergh's Open Space section over the past three years:

	Hadleigh			Sudbury		
	2008	2009	2010	2008	2009	2010
Litter	2	0	2	1	6	2
Dog Fouling	0	0	2		2	1
Graffiti	0	0	1	1	0	1

To put these figures into perspective, the average number of cleansing enquiries received per year by Open Spaces is 650 for Sudbury and 100 for Hadleigh.

13.3 In the 2011 Clean Britain Awards, Babergh received a 5 Star Award (out of 5 stars) for the cleanliness of the district and was awarded a Silver Award for coming second place in the overall district category. The inspections for the award included visits to Sudbury town centre.

13.4 An anti-littering event was held in Sudbury town centre in April 2010 targeting smokers and reducing cigarette butts littered on the street. 100 portable ashtrays were given away as part of this event.

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

13.5 Both town centres 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.

13.6 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.

13.7 Sudbury's North Street / Gainsborough Street / Market Hill have all benefited from enhancement schemes, the most recent of which was 4 years ago. Sudbury takes part in the Britain in Bloom competition each year but the planters are left empty in the winter months, which may be seen as a lost opportunity.

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

13.9 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.

13.10 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.

14. Leisure (etc.)

Should set out the type, number and scale of leisure developments to be encouraged, taking account of their potential impact, including the cumulative impact, on the character and function of the centre, anti-social behaviour and crime, including considering security issues raised by crowded places, and the amenities of nearby residents

14.1 PPS4 requires Town Centre Health Checks to include indicators for leisure floorspace in town centres, edge-of-centre and out-of-centre locations. These uses have therefore been included in the latest Heath Check Assessments of the towns of Sudbury and Hadleigh.

14.2 With regard to the setting of standards for leisure provision, the government has provided guidance for this within the document: “Assessing needs and opportunities”: a companion guide to Planning Policy Guidance note 17: Planning for Open Space, Sport and Recreation (PPG17: 2002), which gives the following questions that should be asked when formulating or reviewing local government planning policies for sport and recreation provision:

- *Have existing policies and provision standards delivered the full range of high quality, accessible open spaces and sport and recreation facilities in the right places to meet local needs? Are they valued by local communities? If not, why not?*
- *Have existing policies relating to the calculation and use of commuted sums for long term management and maintenance been effective? If not, why not?*
- *What lessons can be learnt from the most recent Development Plan Inquiry and decisions relating to any appeals against refusal of planning permission in the area?*

14.3 Table 12 of the Appendix gives an assessment of the numbers and types of the various leisure uses in Sudbury and Hadleigh.

14.4 Within the defined Sudbury town centre the (2011) data shows a healthy array and number of town centre leisure uses for its size, with 27 restaurants / cafes, 11 takeaways, 5 pubs and 1 night club. Sudbury’s Quay Theatre provides access to various musical / other arts related events and to motion pictures on film night. The town also has a large public library, a tourist information centre and 2 museums. Sudbury also has a number of Hotels (3) and B&Bs (5), enough to suit this need. Elsewhere Sudbury has a number of sports and leisure centres, and Belle Vue public park, which offer opportunities for Swimming, Cricket, Football, Hockey, Rowing, Tennis, Bowls, Gymnastics and Dance (amongst others).

14.5 The 2011 data for Hadleigh’s defined town centre also shows a healthy array and number of town centre leisure uses, with 6 restaurants / cafes, 4 takeaways, and 3 pubs. There is no Cinema, theatre or nightclub, but a town the size of Hadleigh would not be expected to provide such leisure establishments. Hadleigh has a public library / tourist information centre but lacks a museum, although it would not necessarily be expected to provide the latter due to its size. Hadleigh has 1 hotel (Edge Hall Hotel) and 5 B&Bs which is healthy for Hadleigh's tourism. Hadleigh too has sports and leisure centres offering a variety of indoor and outdoor sports activities.

14.6 Answers to the 2010 questionnaires submitted to land agents have indicated that the commercial rental values of leisure premises in both Sudbury and Hadleigh town centres has remained fairly static since 2008. Although one agent did identify that there had been a significant decline in leisure premises in Sudbury since 2008.

14.7 Answers to the 2010 questionnaires submitted to Town & Parish Councils indicated that people would be unlikely to visit Sudbury or Hadleigh for their various leisure activities, indicating that the number and profile of these could be raised in both towns.

15. Review of External Evidence

15.1 During the last 12 months substantial planning applications in both Sudbury and Hadleigh have generated a requirement for significant evidence to address issues relating to retail impact and capacity (for further retail floorspace provision) in relation to proposals for retail development, as required by national planning policy (PPS4). In both cases the proposals were for food stores, in addition to a proposal for a non food, retail warehouse in Sudbury. As well as the evidence submitted in support of the planning applications, independent reports were also prepared as a response to these. In addition, further work has recently been carried out for Sudbury as part of additional background work to further progress opportunities on the Hamilton Road Quarter area of Sudbury (funded by the Haven Gateway Partnership). The key findings of all of these reports are summarised below. *Please note that all of this supportive material (except that covered in paragraph 15.8) has been in the public domain as part of the information for these planning applications and used to inform the assessment process of these planning applications, whether these applications have been approved or not. The reproduction of these findings here does not confirm or imply approval or otherwise for any particular application.*

Hadleigh

15.2 ***Martin Robeson Planning Practice - Retail Impact Assessment, in support of a Proposed Foodstore, Brett Works and adjoining land – Hadleigh, December 2010.***

Full documents can be viewed at: http://planning.babergh.gov.uk/doldp/63566_1.pdf and http://planning.babergh.gov.uk/doldp/5483_16.pdf

The main findings of this assessment are summarised below:

- Hadleigh town centre is performing well, with an attractive shopping environment, diversity of units, independent shops and low vacancy rates.
- The town performs poorly with respect to retaining convenience goods expenditure, losing much of it to larger stores outside the town including Copdock Mill and other stores in Ipswich and elsewhere.
- There is limited customer choice in the town for convenience / food shopping, particularly for main shopping trips.
- Any impact of an additional food store is only likely to be on the Co-op and Buyrights, and this is not likely to be significant, as use of these is primarily for top-up shopping. The store

will impact most on main food shopping, so is likely to claw back expenditure from other locations outside of the town.

- The impact of the food store will not result in closure of the existing convenience goods retailers. They will continue to trade at about benchmark densities.
- The new food store will introduce main food shoppers to the town, introducing the potential for spin off benefits, through linked trips, for town centre traders.

15.3 ***Nathaniel Lichfield and Partners - Review of Proposed Tesco Retail Assessment January 2010 (independent report for Babergh District Council).***

The full report can be viewed at: www.babergh.gov.uk/babergh/ldf

The main findings of this assessment are summarised below:

- The impact of the proposed food store on Hadleigh town centre is not considered to be significant.
- A significant proportion of the food store trade is expected to be diverted from large food stores in other towns.
- The Co-op store in Hadleigh is expected to trade just below benchmark levels (after the new store is established) and will not close, even if assessed against the worse case scenario.
- Impact on other convenience business in Hadleigh is estimated not to be more than 10%. This will be offset by expenditure growth up to 2016 and spin off benefits of new linked trips to the food store.
- 'Comparison goods' sales floorspace proposed in the new store is limited and will not harm the town centre.

Sudbury

15.4 ***RPS Planning and Retail Statement for the erection of a non-food, retail warehouse, Northern Road Sudbury - July 2009.***

The full report can be viewed at: http://planning.babergh.gov.uk/doldp/39904_2.pdf

The main findings of this assessment are summarised below:

- There is an identified qualitative and quantitative need for additional DIY goods shopping floorspace in Sudbury.
- The town centre provides a very low level of DIY goods shopping floorspace. The proposed DIY warehouse will not have an adverse impact on the vitality and viability of Sudbury town centre.
- Subsequent retail impact information (that was submitted to support a less restrictive condition on the proposal) confirmed these overall findings and concluded that there will be not be an adverse impact on Sudbury town centre.

15.5 ***Colliers CRE Assessment of Retail Impact of non food, retail warehouse, Northern Road Sudbury *Independent report for Babergh District Council.***

*The full report can be viewed at**:*** http://planning.babergh.gov.uk/doldp/39904_20.pdf

The main findings of this assessment are summarised below:

- Colliers CRE have looked at updated expenditure figures because the Babergh District Retail Study (2008) pre-dated the economic downturn. This still indicates that there will be sufficient available “surplus” expenditure to support the proposed store.
- The proposed store will increase customer choice and there is a quantitative need for the store, as it will reduce the number of trips being made to alternative locations such as Ipswich and Bury St Edmunds.
- The limited current extent of DIY shopping floorspace in Sudbury town centre will mean that the proposed store is unlikely to have a material adverse impact on the vitality and viability of the town centre.
- Subsequent information in respect of not limiting the store to DIY goods only also concluded that there is likely to be sufficient expenditure available to support any type of bulky comparison goods operator, although the case appears to be marginal in relation to electrical/computer goods. Therefore, no adverse impact on the town centre will result.

15.6 ***Indigo Planning and Retail Statement to support proposed Sainsbury’s Supermarket store at the former William Armes site Cornard Road, Sudbury (October 2010) and subsequent report (March 2011).***

Full documents can be viewed at: http://planning.babergh.gov.uk/doldp/60007_8.pdf and http://planning.babergh.gov.uk/doldp/60007_54.pdf

The main findings of this assessment are summarised below:

- The proposed new store will reduce current ‘over trading’, increase choice and competition and reduce expenditure leakage to stores elsewhere, away from Sudbury.
- The retail impact assessment confirms that the proposal will not adversely impact upon the vitality and viability of Sudbury town centre.
- It is estimated that the impact of the new store on Sudbury town centre is low - 0.96% change, which is not a cause for concern in terms of vitality and viability.
- The new store will reduce the dominance of existing food stores, and claw back some expenditure which is currently leaking to other locations.
- In response to issues raised by other retailers objecting to the proposal, a further report was submitted which further concluded that there would be no significant adverse impact on the town centre.
- Although the store will provide sales floorspace for some comparison goods, it is primarily proposed as a food store, offering convenience goods and therefore offering choice to comparable stores which are over trading, or those that are located outside of the district.
- The need for comparison goods shopping provision in the town is significant, so the level provided by the new store will not significantly impact on this demand or detract from opportunities for additional comparison goods retailers being attracted to develop in the town in the future on sites such as the Hamilton Road Quarter.
- It is acknowledged that whilst some convenience goods trade will be diverted from existing stores closer to the town centre that provide a greater opportunity for linked trips, it is concluded that this will not be significant and will not cause any of the existing convenience stores to cease trading.
- Providing greater choice for the main food shop will bring additional shoppers to the town and is likely to increase linked or other visits to Sudbury town centre.

15.7 ***Chase and Partners Proposed Sainsbury's Supermarket, Cornard Road Sudbury-Advice on Retail matters March 2011 and subsequent advice May 2011 (independent advice for Babergh District Council.***

Full documents can be viewed at: http://planning.babergh.gov.uk/doldp/60007_58.pdf and http://planning.babergh.gov.uk/doldp/60007_46.pdf

This report considers the information provided by Indigo in support of the proposal, as well as the Babergh District Retail Study and evidence submitted on behalf of objectors to the proposal. The main findings of this assessment are summarised below:

- Even allowing for some discrepancies in the detail of level of over trading, it is clear that the capacity exists to support the level of convenience floorspace proposed for the new store.
- In terms of comparison goods expenditure there is not an issue with capacity; since with the levels estimated, the store would only provide new floorspace to provide for 11% of the total growth envisaged for Sudbury up to 2014. Having regard to this and the strong trading performance of existing comparison goods stores in the town, it is unlikely that the comparison goods element will have any serious impact on existing comparison goods retailing in the town centre as a whole.
- It is acknowledged that there will be some diversion of trade from the existing town centre convenience stores; however, despite the opposition it is suggested that this will not be significant and certainly not sufficient for any of the stores to cease trading.
- Representations made against the proposal challenge some of the detailed trading figures, leakage and likely impact; however, even taking into account the issues raised on behalf of existing retailers, it is concluded that the proposals would not lead to significant adverse effects on the vitality and viability of the town centre.

15.8 ***Review of Sudbury as a Retail centre - Report by Jones Lang LaSalle, September 2011 for Babergh District Council to support evidence for redevelopment opportunities on the Hamilton Road Quarter site.***

The full report can be viewed at: www.babergh.gov.uk/babergh/ldf

This report provides an independent and objective appraisal of Sudbury as a retail centre. Its overall conclusions are:

- Sudbury is currently a strong retail centre which responds well to its local catchment demands. Conditions in the UK retailing market remain very difficult, but the evidence points to Sudbury weathering the storm better than many other centres.
- Sudbury is a balanced town centre where local traders and national multiples blend together seamlessly. This is borne out both qualitatively and quantitatively. The breakdown is that 55% of the retail floorspace is occupied by national or regional operators with 45% occupied by independent traders.
- Qualitatively the independents and multiples bring some welcome uniqueness and diversity further emphasized by the extent of the dispersed nature of these and intermingling of independents with multiple traders. This is likely to be a positive factor contributing to the low vacancy rate in the town.
- Just 5.9% (July 2011) of retail units were vacant, with this equating to just 2.3% of Sudbury's retail floorspace. This is significantly lower than the reported national average at the same time of 14.5%.

16. Summary and Conclusions

16.1 The availability of up-to-date opinion research is limited, although this will be enhanced relatively soon as a result of current work being conducted on behalf of Babergh (by Jones Lang LaSalle) as stage 2 analysis for the Hamilton Road Quarter redevelopment scheme. Opinion research conducted by Babergh in 2010 indicated that both Sudbury and Hadleigh are considered accessible by a choice of means of travel. A significant number of car parking spaces is available in Sudbury and Hadleigh. Sudbury is accessible by rail, whilst both Sudbury and Hadleigh have bus stations and are adequately served by public transport. Provision is made for pedestrians, cyclists and the disabled although these, as well as signage, could be improved in both these town centres.

16.2 Town & Parish Council views have indicated that in Hadleigh the specialist shops, free (short term) car parks and the 'local character' of the town are highly valued, whilst in Sudbury it is the markets, the free (short term) car parks, the town's 'local character', the variety of shops and its overall accessibility for wheelchair users which are most valued.

16.3 Concerns in Hadleigh include lack of overall access for wheelchair users, lack of good public transport links and lack of cycle parking facilities. In Sudbury the main concerns were traffic and pedestrian congestion at peak times and the lack of cycle parking facilities. The lack of leisure facilities was a key concern for both towns.

16.4 Higher pedestrian flows were recorded in both Sudbury and Hadleigh during 2008 than in 1999 but clearly more up-to-date information is now required. Crime figures across Babergh as a whole are generally low. There are particular crime or related issues with respect to the two town centres and these are being addressed. The environmental quality of the both town centres was considered as good, with low recordings of noise, graffiti and litter.

16.5 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.

16.6 In terms of headline findings and conclusions, this health check report indicates that both Sudbury and Hadleigh town centres can be considered to be in a good state of 'health'. The results of this report compare well with those of the 2008 report. The vacancy rates of Sudbury and Hadleigh town centres fall within / below the 5-8% range respectively 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. Increases in the prime retail rental value in Sudbury and Hadleigh have been recorded between 2002 and 2010. These factors suggest that the centres have responded relatively successfully overall to the serious economic downturn. This is not to imply that they have not faced considerable difficulties, or experienced setbacks and other issues including business closures and losses of some town centre outlets. However, a positive sign is that the centres have remained attractive places in which to invest and this is illustrated by new business start-ups and take up of vacant shop units by replacement occupiers.

16.7 The overall conclusions arrived at as a result of Babergh's in-house assessments appear vindicated by the independent evidence reviewed. The latter illustrates scope / demand and retailer interest for further new retail floorspace provision. This in turn offers potential for both centres to consolidate or strengthen their positions by retaining existing trade and expenditure and / or attracting that from outside the towns themselves through an improved retail offer.

This work has improved understanding of the 2 town centres, together with that of their individual characteristics, strengths and weaknesses.

16.8 As before, all such considerations indicate that whilst acknowledging strengths and successes, there is no room for complacency and there is a need for a positive strategy for the future well-being of both town centres. This will need to allow for some flexibility and adaptation to future changes in circumstances.

16.9 For Sudbury, the indications are that scope needs to be found to grow, develop, improve and diversify the town centre. This is partly in response to the needs of a growing wider town. The Hamilton Road Quarter development could be a significant step forward in this regard and this would be realized partly by linking disparate parts of the existing centre, as well as expanding and improving it. Where any expansion occurs it will be vital to ensure that appropriate sites are identified, that complementary forms and scales of development are delivered and that any such developments are tied in with the existing centre properly. Map 4 and its ensuing text address potential town centre expansion in a preliminary way and this could be used as a basis for further work and analysis. Findings of the various supportive documents to inform planning applications and the Hamilton Road Quarter make it clear that Sudbury town centre cannot be expected to be able to compete directly with its larger equivalents at locations like Bury St Edmunds or Colchester. Instead, the approach for the town centre should be more concerned with maintaining and enhancing those qualities that are different from such centres.

16.10 The weekly markets and periodic more specialist markets (such as farmers markets and continental markets) also seem to be important to the town and these prove successful in increasing the numbers of customers visiting the town centre when markets are held, to its wider benefit. The scale and nature of the existing town centre and its planned growth and improvement would benefit from a town centre action plan or other document of a similar purpose. This raises an important issue of identifying the considerable resources that would be necessary for such a venture.

16.11 For Hadleigh, there does not appear to be such an obvious need to expand the town centre other than improving its convenience goods retail offer and a site has been identified and allocated to meet this need. Some potential expansion opportunities are identified in Map 5, in case other expansion proves desirable and beneficial. The quality of environment and its historic nature in particular represent some of its most important assets and selling points. The wealth of independent retailers, specialist / niche interest shops and other customer services, such as cafes and restaurants, represents another important advantage.

16.12 These characteristics need to be safeguarded and enhanced where possible, although considerable efforts have already been invested in town centre environmental enhancements in recent years. The dominance of the car, together with provision for its use and the effect of this on the centre's ease of use by pedestrians, represents a relatively obvious area in which further environmental enhancements could be achieved. Hadleigh's weekly market is very small and does not appear to be very influential in attracting customers to the town. However, it does add to the retail offer and choice of goods available.

16.13 A number of further suggestions for actions that may improve the town centres is included in the appendix at the end of this report and these may prove helpful in any future actions plans or strategies aimed at promoting town centre vitality and viability.

17. Other Considerations

17.1 PPS4 only requires that health checks are undertaken for town centres. In Babergh's case this means checks for Hadleigh and Sudbury in practice. However, it is recognized that Lavenham, Long Melford and Great Cornard also have a part to play in the retail economics and in meeting the shopping and related needs of the District, as do village facilities.

18. Acknowledgements

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

- Town & Parish Councils, Birchall Steel Consultant Surveyors, Elsom Spettigue Associates Ltd. 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.

Planning Policy, Babergh District Council, Corks Lane, Hadleigh, Suffolk, IP7 6SJ

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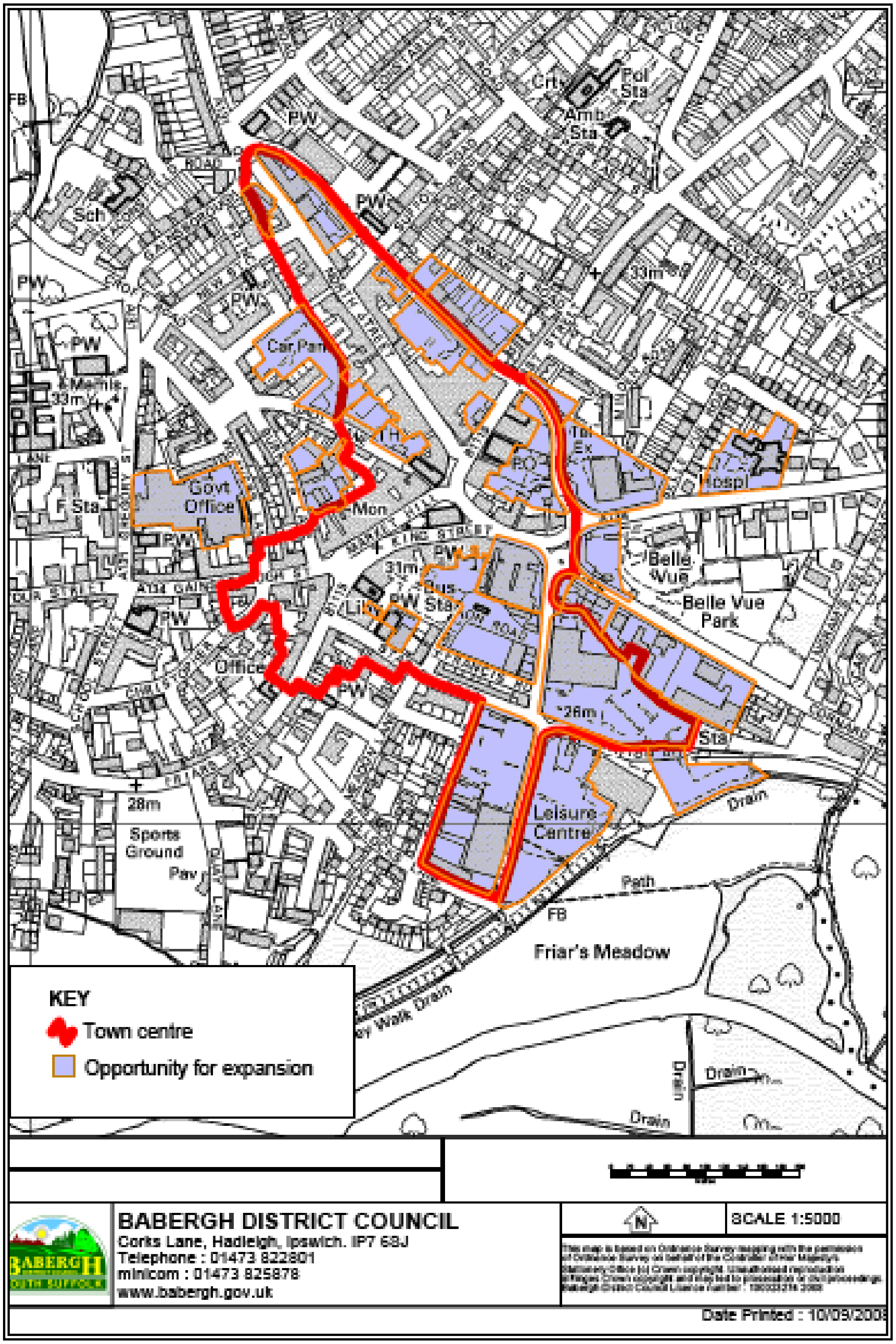
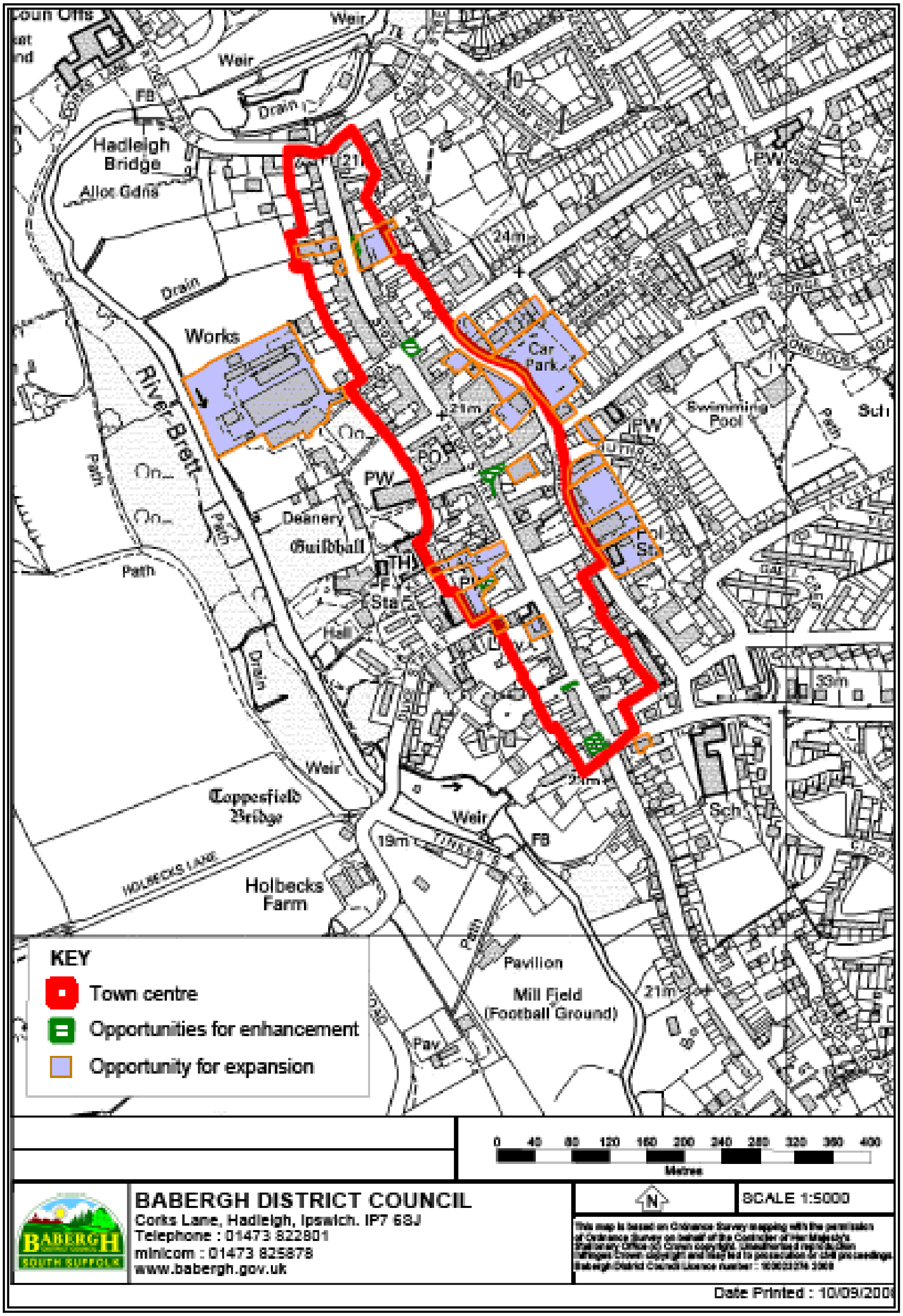
Map 4 – Areas of Opportunity in Sudbury



Map 5 – Areas of Opportunity in Hadleigh



Appendix 1

19. Recommendations and Opportunities

19.1 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

19.2 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.

19.3 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.

19.4 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.

19.5 In addition to the lack of direction, the condition of the signs is a concern. There is no maintenance budget for their upkeep 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).

Provision for the Disabled

19.6 An audit of both Hadleigh and Sudbury town centre's 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

19.7 The condition of much of the street furniture in both Sudbury and Hadleigh town centres 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.

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

19.9 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

19.10 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.

19.11 It is acknowledged that changing shop window displays make an area attractive and encourages 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

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

Advertising and Public Relations

19.13 The continuation of the marketing and promotion 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

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

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

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

Parking

19.17 Parking remains an emotive issue across the district. There are a significant number of spaces available in each town (see tables 19 and 20 of the appendix). In the past all these have been free, unlike neighbouring districts. However, monitoring of both the car parks and the on street parking has been required as there is widespread abuse of the system, in terms of time and location

19.18 In order to resolve the above monitoring issues, and as part of a wider package aimed at closing its budget deficit for 2012/2013, Babergh Councillors agreed in February 2010 to introduce a £1.50 charge for anyone wishing to park for more than three hours in its long stay car parks in the two towns.

19.19 Ahead of this scheme (introduced in October 2010), and recognising that the impact on regular users of the long stay car parks of the charges should be reduced if possible, Babergh issued 133 parking permits which offer discounts compared to the daily rate of £1.50 to park at the station, Sudbury, Station Road Sudbury and the rear part of Magdalen Road, Hadleigh. These discounted parking permits can be bought on an annual (for £250), three-monthly (£70) or monthly (£25) basis for one of the specific car parks listed above.

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 (Was: www.socd.communities.gov.uk)

Table 2 Edge of Town and Out of Town Centre Locations

Hadleigh Catchment	Location	2002 (sq m)	May 2010 (sq m)
Copdock Mill Interchange	Out of town	17403	17538
Aldham Mill Road, Hadleigh	Out of town	6489	7169
Total		**23892**	**24707**

Sudbury Catchment	Location	2002 (sq m)	May 2010 (sq m)
Girling Street, Sudbury (Aldi)	Edge of town	760	973
Woodhall, Sudbury (Tesco)	Out of town	7546	9943
Shawlands, Northern Road, Sudbury*	Out of town	0	3348
Jades, Northern Road Sudbury**	Out of town	0	3352
Total		**8306**	**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	SG	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
2009	159	37	29	6	9	8	0	1	10	2	7	268
2010	158	36	28	8	10	7	0	1	9	2	7	266
2011 (Oct)	148	33	27	5	11	6	0	1	7	2	8	248

(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	SG	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	0	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
2009	26287	4283	2440	1696	566	2648	0	242	2585	249	1817	42813
2010	26587.5	4351	2435.5	2620	712	2618	0	242	2206	249	2128	44149
2011 (Oct)	25348	4325	2675	1895	806	2479	0	242	2161	249	2109	42289

(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	SG	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
2009	65	16	6	3	4	12	1	1	5	0	4	117
2010	65	12	6	3	4	13	1	1	5	0	4	114
2011 (Oct)	58	11	6	3	4	11	1	1	4	0	6	105

(Source: Information collected by Babergh District Council)

Table 6 Area of Ground Floor Units by Use Class – Hadleigh

Hadleigh	A1	A2	A3	A4	A5	B1	B2	C1	D1	D2	SG	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
2009	8297	1718	601	828	197	1005	86	207	593.5	0	1071	14603.5
2010	8116	1647	601	828	197	1202	86	207	593.5	0	1071	14548.5
2011	7656	1497	601	828	197	1135	86	207	517.5	0	1151	13875.5

(Source: Information collected by Babergh District Council)

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 from 2000. Every effort has been made to ensure the accuracy of the most recent data. Some discrepancies between this and previous years could be attributed to changes in Use Class that were not picked up following changes in ownership.
*Measurements amended to ground floor only as prescribed by PPS6, has a significantly skewed result for B1

Table 7 - No. of Ground Floor Units by Use Class - % Change over Period 1999 - 2011 and 2007 - 2011

	Years	A1	A2	A3/A4/A5	B1	B2	C1	D1	D2	SG	Total
Sudbury	**1999 - 2011**	-9.76	22.22	72	-57.14	-100	-50	-12.50	-50	166.67	0
	2007 - 2011	-8.07	13.79	7.50	-50	-100	-50	-30	0.00	60	-5.34
Hadleigh	**1999 - 2011**	-7.94	-8.33	8.33	-15.38	0	-50	-33.33	0	50	-7.08
	2007 - 2011	-7.94	-21.43	-7.14	-21.43	0	-50	-20	0	50	-10.26

(Source: Information collected by Babergh District Council)

Table 8 - Area of Ground Floor Units by Use Class - % Change over Periods 1999 - 2011 and 2007 - 2011

	Years	A1	A2	A3/A4/A5	B1	B2	C1	D1	D2	SG	Total
Sudbury	**1999 - 2011**	-6.63	18.43	102.41	37.11	-100	-47.62	-25.76	-69.74	85.33	3.86
	2007 - 2011	-5.33	14.09	17.28	52.93	-100	-47.62	-16.40	0	18.42	-0.91
Hadleigh	**1999 - 2011**	0.33	-9.60	1.69	-4.30	0	-49.14	-25	0	16.38	-2.59
	2007 - 2011	-6.68	-8.83	-8.19	-10.70	0	-49.14	-12.81	0.00	7.47	-7.78

(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	SG
Sudbury	**1999**	66.13	10.89	*10.08*				5.65	0.40	0.81	3.23	1.61	1.21
	2011 (Oct)	59.68	13.31	*17.34*	10.89	2.02	4.44	2.42	0.00	0.40	2.82	0.81	3.23
Hadleigh	**1999**	55.75	10.62	*10.62*				11.50	0.88	1.77	5.31	0	3.54
	2011 (Oct)	55.24	10.48	*12.38*	5.71	2.86	3.81	10.48	0.95	0.95	3.81	0	5.71

* Combined figure given for comparison of A3/A4/A5 between 1999 and 2011

(Source: Information collected by Babergh District Council)

Table 10 General Factors

Town Centre	Total length shop frontage (m)	Average / shop width	No. of regional / national operators	% of regional / national operators	Unit size range
Sudbury	2256.4	9.10	75	30.24%	15-2862 sq m
Hadleigh	930.4	8.86	21	19.26%	7-1476 sq m

(Source: Information collected by Babergh District Council)

Table 11 Non- Retail Floorspace (which is considered to be an attraction to a place)

Hadleigh Catchment	Location*	Approx floorspace
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	Location	Approx floorspace
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
*** Kersey Mill is currently for sale (April 2011) following the collapse of Kersey Mill Ltd's

(Source: Information collected by Babergh District Council)

Table 12 Other Leisure Uses

Leisure Use	Sudbury	Hadleigh
Cinemas	No official cinema. The Quay Theatre has a film night (showing films that have already been released on DVD)	No Cinema
Theatre	Quay Theatre (126 seats)	No Theatre
Restaurants	14 Restaurants	4 Restaurants
Cafes	10 Cafes	2 Cafes
Takeaways	14 Takeaways	8 Takeaways
Pubs & Bars	20 Pubs	6 Pubs
Nightclubs	2 – Easterns and Infinity	No Nightclubs
Libraries	1 on Market Hill	1 on the High Street
Sports / Leisure Facilities	Sports Centre (another in Gt Cornard), Leisure Centre with Swimming Pool, Belle Vue Park, Cricket, Football, Hockey, Rowing, Tennis and Bowls Clubs. Gymnastics Club.; 3 Gyms; Dance studio in Quay Lane	Sports / Leisure Centre with Swimming Pool, Football, Cricket, Hockey and Bowls Clubs.
Hotels and B&Bs	Mill Hotel – 56 Bedrooms Hill Lodge Hotel The Black Boy B&B Wagon & Horses B&B The Bay Horse B&B – 5 Bedrooms Hill View Studios B&B Mill House B&B- 2 Bedrooms The Olde Bull Hotel- 10 Bedrooms	Edge Hall Hotel Orchard End B&B- 2 bedrooms Westward Cottage B&B – 2 bedrooms A Garden retreat B&B – 2 bedrooms The Gables B&B – 5 bedrooms The Old Monkey B&B – 1 bedroom

Other	Gainsborough House Art Gallery / Museum Sudbury Heritage Centre & Museum Tourist Info Centre Market Water Meadows / Croft and Railway Walk	Tourist Info Centre (Library) Market Riverside / The Fuzz / Railway Walks
Schools and Education Facilities	Sudbury Upper, All Saints Middle, St Gregory Primary, St Joseph's Primary, Tudor Primary, Uplands Middle, Woodhall Primary, Hillside Special School. West Suffolk Adults Centre (Belle Vue)	Hadleigh High, Beaumont Primary and St Mary's Primary.
Hospitals & GPs	Meadow Lane Surgery, Hardwick House Surgery, Siam Place Surgery, Walnuttree Hospital, St Leonard's Hospital.	Hadleigh Health Centre
Community Facilities	2 Halls in Princes Street, Masonic Hall, Delphi Club, Scouts Hall in Quay Lane	Scout Hut (Osborne Hall)
Churches	John's Methodist, St Peter's, St Gregory's, Sudbury Baptist, All Saints, St Mary's & St Johns, Suffolk Road Church, Newton Road Church, Religious Society of Friends, Christ Church United Reformed Church.	St Mary's Church, Church in Duke Street and Church in Long Bessells.

Table 13 Vacancy (Town Centre) - as at October 2011

		Total no. of shops	Vacant	% vacant	Total floor space (sq m)	Total floor space vacant (sq m)	% floor space vacant
Sudbury	Prime	44	1	2.27	8741	41	0.47
	Secondary	204	12	5.88	33548.2	1064	3.17
	Total	**248**	**13**	**5.24**	**42289.2**	**1105**	**2.61**
Hadleigh	Prime*	42	0	0%	6758.5	0	0%
	Secondary	67	4	5.97%	7117	341	4.79%
	Total	**109**	**4**	**3.67%**	**13875.5**	**341**	**2.46%**

(Source: Information collected by Babergh District Council)

Table 14 Yields (2002 – 2008)

Source: VOA Property Market Report – July 2008:

http://webarchive.nationalarchives.gov.uk/20110320170052/http://www.voa.gov.uk/publications/property_market_report/index.htm

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.

	Apr 02	Oct 02	Apr 03	Jan 04	Jul 04	Jan 05	Jul 05	Jan 06	Jul 06	Jan 07	Jul 07	Jan 08	Jul 08
Cambridge	5.25	5.25	5.5	5.25	5.5	5.25	5.25	5.25	5.25	5.25	5	5.25	5.75
Bury St Edmunds	5.25	5	5	5.25	5.25	5	5	5	5.25	5.25	5	4.75	5.00
Newmarket	7.75	7.5	7.5	7.25	6.75	6.75	6.75	6.75	6.5	6.5	6.25	6.00	6.25
Haverhill	8.5	8	7.75	7.75	7.75	7.75	7.75	7.5	7.25	7.25	7	6.75	7.00
Colchester	6	6	6	6	6	5.5	5.25	5	4.75	4.75	4.75	4.50	4.50
Ipswich	4.5	4.25	4	4	4.25	4.25	4.75	4.75	4.75	4.75	4.75	4.75	5.00
Lowestoft	7.75	7	6.75	6.75	6.75	6.75	6.75	6	6	6.00	5.75	5.5	5.50
Felixstowe	8.25	7.5	7.5	7.25	7.25	7.25	7.25	7	6.75	6.50	6	5.5	5.75
Sudbury	7.75	7	6.75	6.75	7	6.75	6.75	6.5	6	6.00	5.75	5.5	5.75
Stowmarket	8.75	8	7.75	7.5	7.5	7.5	7.5	7.25	7	7.00	6.75	6.25	6.25
Norwich	5	5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.5	5.25

Pedestrian Flows: Sudbury (2008)

Table 15 Sudbury: Summary by Day

	0900 - 0930	0930 - 1000	1000 - 1030	1030 - 1100	1200 - 1230	1230 - 1300	1300 - 1330	1330 - 1400	1500 - 1530	1530 - 1600	1600 - 1630	1630 - 1700	Total
Saturday 19 Jan 2008	868	871	1297	1298	2051	2037	1970	1813	1298	1333	995	773	**16604**
Monday 21 Jan 2008	935	1211	1240	1309	1304	1433	1238	1155	1001	1121	982	829	**13758**
Friday 25 Jan 2008	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**
Avg Flow / Day	**889**	**1024**	**1196**	**1220**	**1562**	**1557**	**1556**	**1410**	**1205**	**1251**	**1050**	**853**	**14775**

Table 16 Sudbury: Summary by Location

		0900 - 0930	0930 - 1000	1000 - 1030	1030 - 1100	1200 - 1230	1230 - 1300	1300 - 1330	1330 - 1400	1500 - 1530	1530 - 1600	1600 - 1630	1630 - 1700	Total
North Street	Sat 19 Jan 08	406	356	523	459	857	897	935	853	543	670	510	406	**7415**
	Mon 21 Jan 08	409	493	501	581	586	634	492	459	493	600	443	387	**6078**
	Fri 25 Jan 08	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)	Sat 19 Jan 08	304	333	513	565	866	830	775	723	563	474	366	256	**6568**
	Mon 21 Jan 08	306	494	450	453	463	539	522	473	332	355	343	332	**5062**
	Fri 25 Jan 08	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)	Sat 19 Jan 08	158	182	261	274	328	310	260	237	192	189	119	111	**2621**
	Mon 21 Jan 08	220	224	289	275	255	260	224	223	176	166	196	110	**2618**
	Fri 25 Jan 08	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**
Avg Flow / Day		**889**	**1024**	**1196**	**1220**	**1562**	**1557**	**1556**	**1264**	**1205**	**1251**	**1050**	**853**	**4876**

(Tables 15 and 16 - Source: Information collected by Babergh District Council)

Pedestrian Flows: Hadleigh (2008)

Table 17 Hadleigh: Summary by Day

	0900 - 0930	0930 - 1000	1000 - 1030	1030 - 1100	1200 - 1230	1230 - 1300	1300 - 1330	1330 - 1400	1500 - 1530	1530 - 1600	1600 - 1630	1630 - 1700	Total
Saturday 26 Jan 2008	181	242	340	390	444	379	340	339	303	355	226	171	**3710**
Tuesday 29 Jan 2008	239	289	294	349	351	357	309	285	286	272	225	192	**3448**
Friday 01 Feb 2008	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**
Avg Flow / Day	**252**	**291**	**346**	**391**	**425**	**370**	**347**	**312**	**320**	**324**	**237**	**195**	**3810**

Table 18 Hadleigh: Summary by Location

		0900 - 0930	0930 - 1000	1000 - 1030	1030 - 1100	1200 - 1230	1230 - 1300	1300 - 1330	1330 - 1400	1500 - 1530	1530 - 1600	1600 - 1630	1630 - 1700	Total
High Street North	Sat 26 Jan 08	73	114	139	168	220	155	176	165	140	163	112	70	**1695**
	Tue 29 Jan 08	126	133	150	181	188	198	184	157	154	144	120	111	**1846**
	Fri 01 Feb 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	Sat 26 Jan 08	108	128	201	222	224	224	164	174	163	192	114	101	**2015**
	Tue 29 Jan 08	113	156	144	168	163	159	125	128	132	128	105	81	**1602**
	Fri 01 Feb 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**
Avg Flow / Day		**252**	**291**	**346**	**310**	**425**	**370**	**347**	**312**	**320**	**324**	**237**	**195**	**1905**

(Tables 17 and 18 - Source: Information collected by Babergh District Council)

Car Parking

Table 19 Sudbury

SUDBURY	Type	Spaces	Disabled	Parent / Toddler	Motor-cycle	Coach / Lorry	Taxi	Total
Station Rd (Kingfisher)*	Long Stay	287	6	4	0	12	0	**309**
Station Rd (R/way Stn)*	Long Stay	131	3	4	0	0	2	**140**
Ballingdon Street	Long Stay	13	1	0	0	0	0	**14**
Mill Lane	Long Stay	21	2	0	0	0	0	**23**
Quay Lane	Long Stay	19	0	0	0	0	0	**19**
Stour Street	Long Stay	38	1	0	0	0	0	**39**
North Street	Short Stay	182	5	4	1	0	0	**192**
Girling Street	Short Stay	67	4	4	3	0	0	**78**
Gt Eastern Road (Roys)	Short Stay	256	10	4	0	0	0	**270**
Total		**1014**	**32**	**20**	**4**	**12**	**2**	**1084**

Table 20 Hadleigh

HADLEIGH	Type	Spaces	Disabled	Parent / Toddler	Motor-cycle	Coach / Lorry	Taxi	Total
Magdalen Road*	Long Stay	94	3	0	0	10	0	**107**
Magdalen Road	Short Stay	67	7	4	1	0	0	**79**
Stonehouse Road	Long Stay	30	3	4	0	2	0	**39**
R/way Walk (off Stn Rd)	Long Stay	5	0	0	0	0	0	**5**
High Street	Short Stay	45	3	4	0	0	0	**52**
Maiden Way	Short Stay	6	1	2	0	0	0	**9**
Toppesfield Hall	Short Stay	16	3	2	0	0	0	**21**
Total		**263**	**20**	**16**	**1**	**12**	**0**	**312**

(Tables 19 and 20 - Source: Information from Babergh District Council. Valid as of June 2011)
(* Charges apply if staying over 3 hours)

Table 21: Shopping Rents (2008)

Prime Rents (£ / sqm / annum)	Shops (£)	Office (£)
Cambridge	£2,550	£220*
Ipswich	£1,650	£100
Norwich	£2,350	£150*
Colchester	£1,850	£130

* Denotes accommodation with air conditioning

Source: http://webarchive.nationalarchives.gov.uk/20110320170052/http://www.voa.gov.uk/publications/property_market_report/index.htm