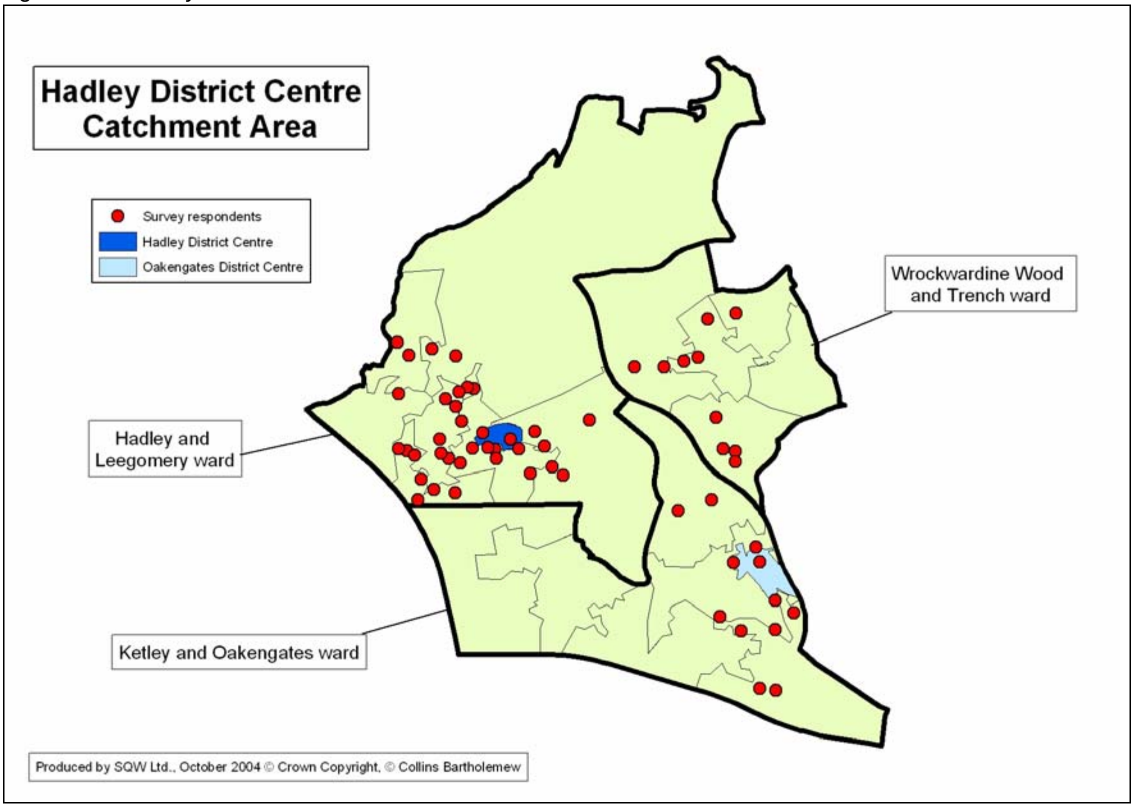
1 Hadley District Centre Analysis

The catchment area

1.1 The catchment area for the Hadley DC has been determined by postcode data from the shopper survey respondents. Respondents living in the three wards of Hadley and Leegomery, Ketley and Oakengates, Wrockwardine Wood and Trench comprise 58% of all survey respondents who gave complete postcodes. These three wards, totalling some 25,963 people, comprise the current catchment area for the DC (Figure 1-1).

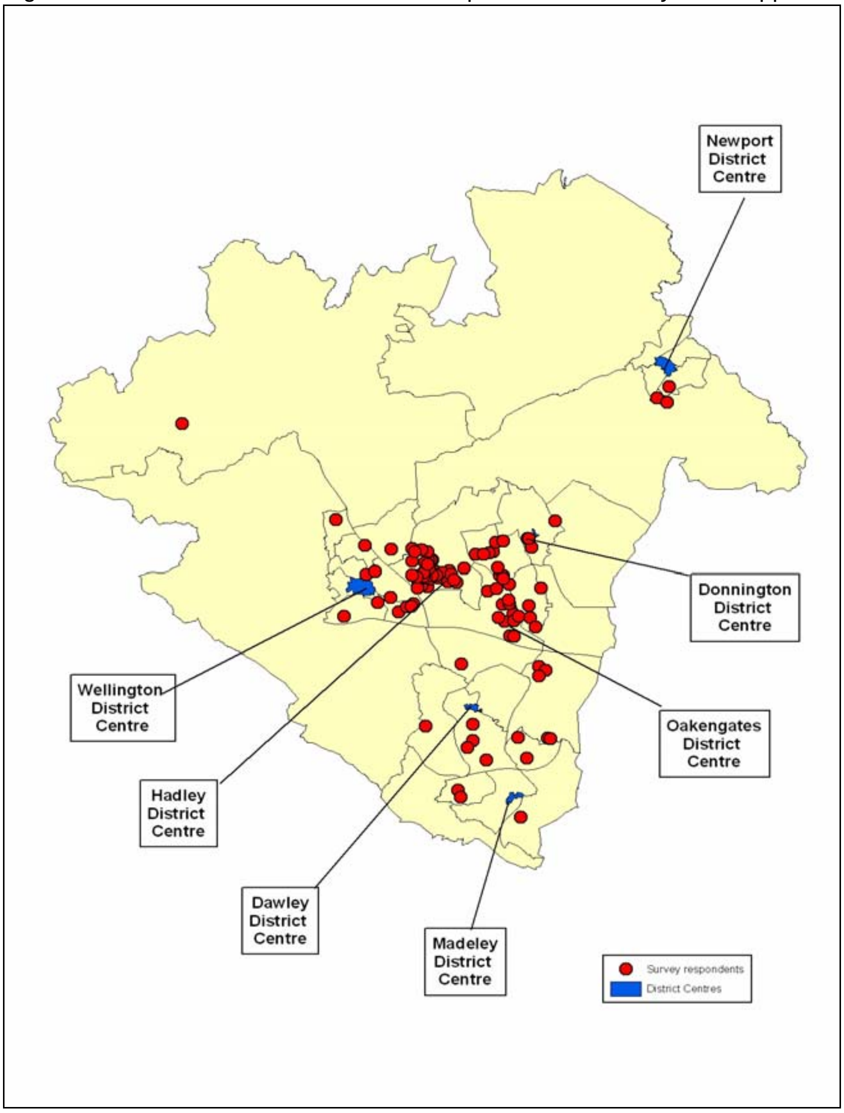
Figure 1-1 -Hadley District Centre catchment area



1.2 Figure 1-1 illustrates that Hadley DC catchment area clearly overlaps with that of Oakengates DC, drawing shoppers who actually live closer to the Oakengates than Hadley.

1.3 Hadley DC also attracts a substantial number of respondents from further afield, particularly from areas surrounding Dawley, Madeley and Donnington (see Figure 1-2).

Figure 1-2 - Location of residence for all respondents in Hadley DC shopper survey



2 Socio-economic profile of Hadley DC catchment area

Below average population density; older population

2.1 The population density of Hadley catchment area is 17.8 people per hectare, which is slightly below the average for the other DCs (19.3 people per hectare).

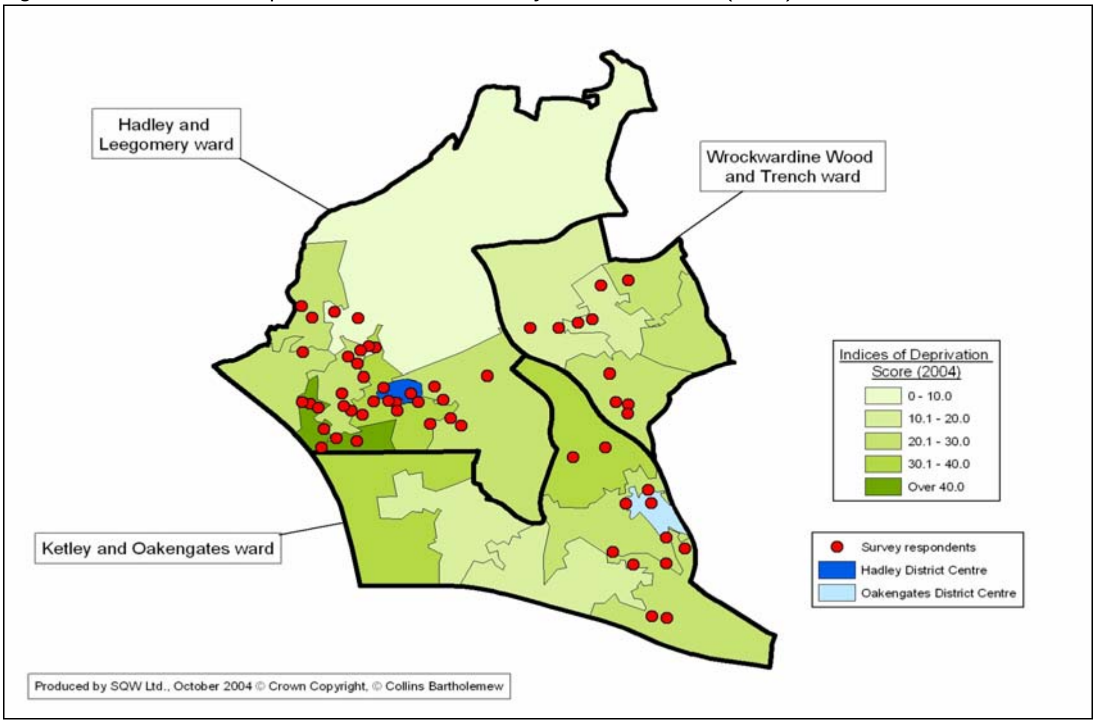
2.2 The age structure of Hadley DC catchment area largely reflects that of the wider sub-region; the under 16 age group constitutes 22% of the population, the 16-29 age group accounts for 18% and the 30-64 age group accounts for 46.9%.

2.3 The working age population (65.7%) is slightly below the Borough average (66.4%). The core retirement age group (aged 65 and above) is over-represented in Hadley catchment area, accounting for 13.3% of the population.

Pockets of deprivation towards the south west of Hadley DC

2.4 The overall Indices of Multiple Deprivation score (2004) for the Hadley catchment area is 22.1, slightly above the Borough average of 21.8. Figure 2-1 shows the Indices of Multiple Deprivation score is inflated by two small Super Output Areas, located to the south west of Hadley DC, which register scores of 44.

Figure 2-1 - Indices of Deprivation Score for Hadley catchment area (2004)



Poorly qualified population, especially in Wrockwardine Wood and Trench

2.5 Qualification levels across Hadley catchment area are very low; the proportion without any qualifications stands at 36.9%, with very little variation across the three wards which make up the catchment area.

2.6 Under 10% of the population (aged 16-74) have a degree or equivalent, the second lowest proportion of graduates in all DCs surveyed, and falling to only 7.2% of those living in the Wrockwardine Wood and Trench ward.

Below average levels of economic activity and employment, but also low unemployment rates

2.7 Economic activity and employment levels in Hadley catchment area, at 67.4% and 62.2% of the population aged 16-74 respectively, are slightly below the Borough average. However, the proportion claiming unemployment benefits (Job Seekers Allowance) is less than might be expected, standing at 1.5% of the working age population compared to 1.6% across Telford and Wrekin.

2.8 Over 32% of people aged 16-74 are economically inactive, of which 37.6% are retired.

Relatively high income levels, juxtaposed against pockets of dependency on Income Support

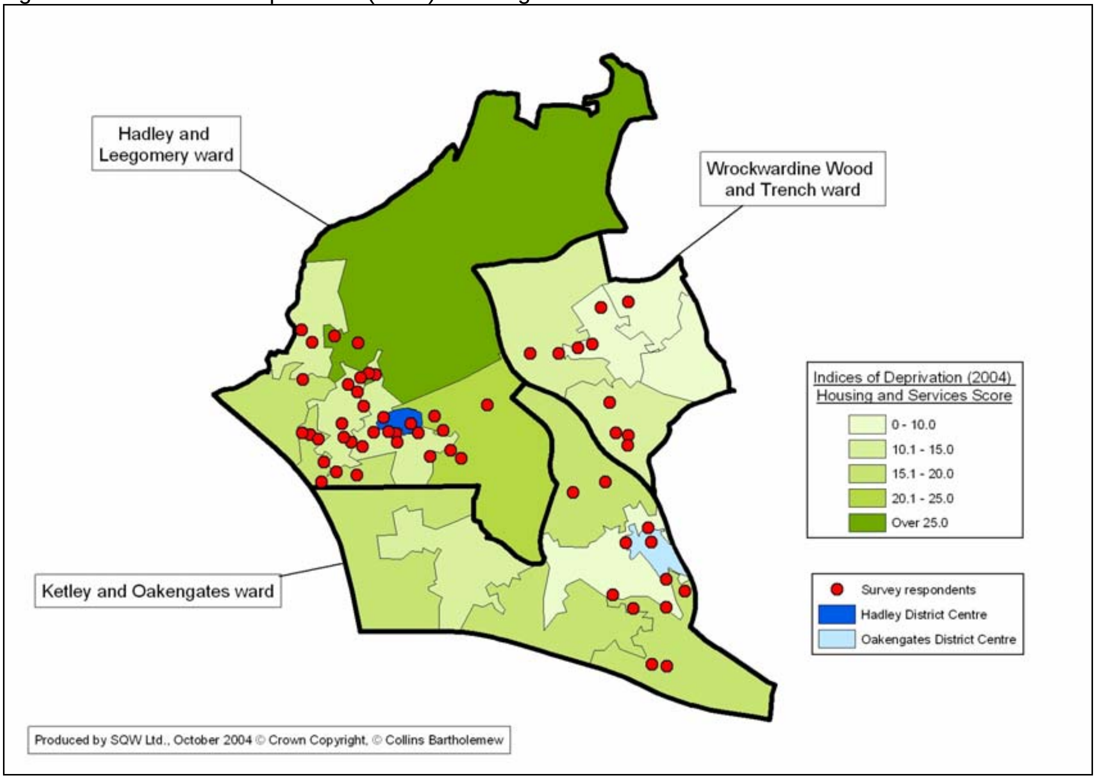
2.9 Gross weekly pay (2003) for full and part time employees in the Hadley catchment area is £341, and £399 when taking only full time employees into account, both of which are above averages for the Borough as a whole. Despite this, the proportion of the working age population who are dependent on Income Support Benefits (12.7%) is relatively high, increasing to 14.6% in the Hadley and Leegomery ward.

Accessibility a challenge for residents in the Hadley and Leegomery ward

2.10 Almost one quarter of households in the Hadley catchment area do not have a car (24.4%), compared to 22.8% across the wider Borough, and rising to 26.9% in the Hadley and Leegomery ward.

2.11 Correspondingly, as Figure 2-2 illustrates, large areas of Hadley and Leegomery ward experience considerable difficulties in the accessibility of housing and services, compared to the Wrockwardine Wood and Trench ward and Ketley and Oakengates ward.

Figure 2-2 - Indices of Deprivation (2004) Housing and Services score



High levels of health-related benefits claimed

2.12 The proportion of the population who have a limiting long-term illness is among the highest of all DCs surveyed (20.1%). Incapacity Benefit and Disability Allowance claimant rates are similarly high, claimed by 4.9% and 6.4% of the population respectively. Disability Allowance claimant rates are particularly high in the Hadley and Leegomery ward (6.6%) and Ketley and Oakengates ward (6.7%).

3 Shopper survey in Hadley DC

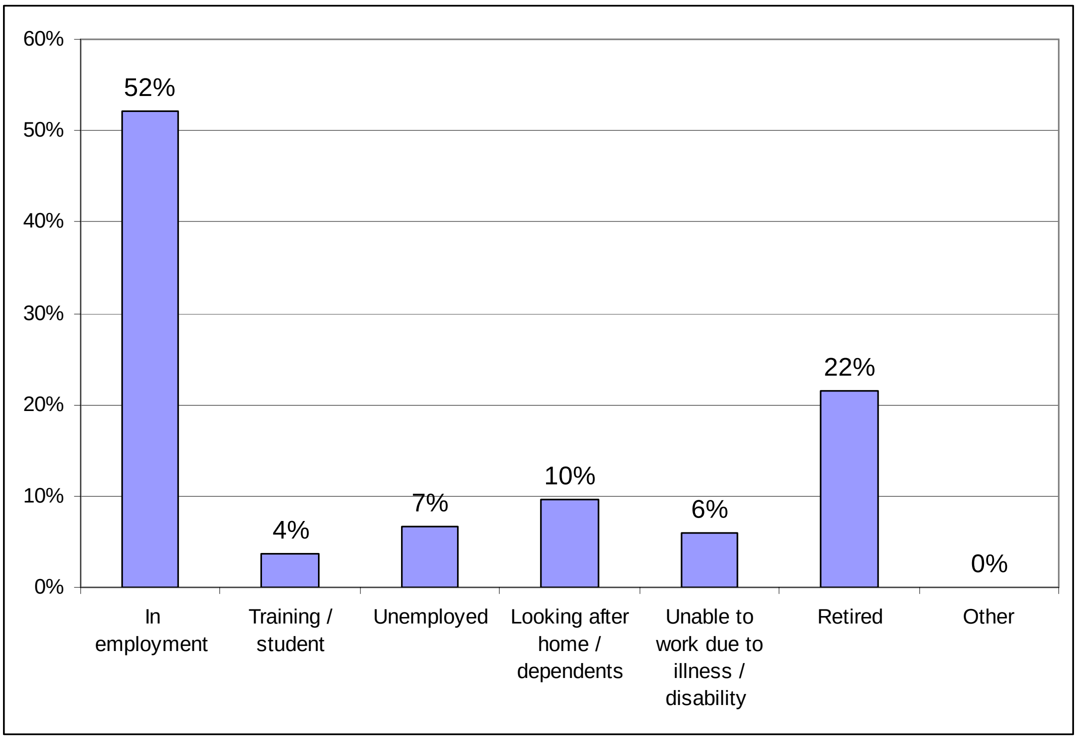
Shopper profile

3.1 The 45-64 age group constitute the largest proportion of the sample (35.1%), followed by 25-44 (29.9%). Compared to surveys in other DCs the proportion of respondents in the 16-24 age group is relatively high (21.6%), and the proportion in the 65 and above age group is relatively low (13.5%).

3.2 As illustrated by Figure 3-1, the survey sample had comparatively high levels of people in employment (52.2%), although they also had above average levels of unemployment (6.7%).

3.3 The proportion of respondents who look after home and / or dependents, and who are unable to work due to illness / disability are notably high (9.7%), which may be linked to the high rate of limiting-long term illness in the area.

Figure 3-1 - Employment status of respondents in Hadley DC



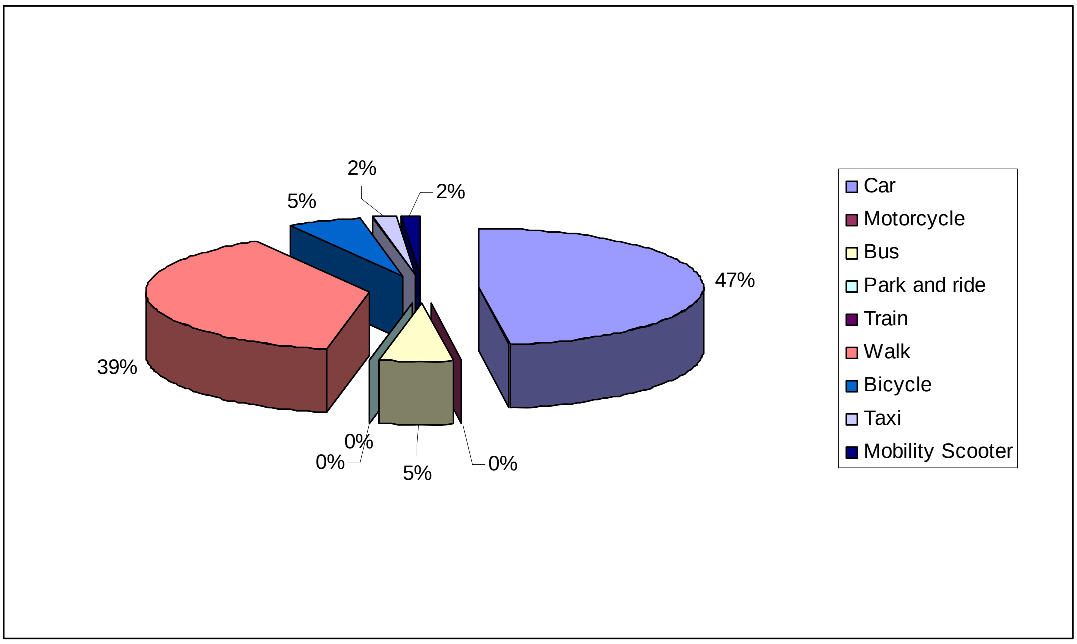
Usage

3.4 The shopper survey indicates that Hadley is predominantly used for top-up shopping (36.6%) and specialist shopping (17.9%). Secondary reasons for visiting Hadley are to go for a walk (15.7%) and to eat out (11.2%).

3.5 Visits to Hadley are more likely to be irregular, and for a short period of time. Over 83% of respondents spend one hour or less in Hadley, of which half spend under 30 minutes in the DC. Some 53.7% of respondents visit Hadley twice a week or more, which is low compared to an average of 67.6% for all DCs surveyed. The proportion of respondents who visit the DC less regularly (monthly or less) is substantially higher than average, standing at 13.4%.

3.6 As illustrated by Figure 3-2, the car is the most popular mode of transport used to reach Hadley DC. Travel on foot is higher than expected compared to other DCs, whereas bus use is half the average level.

Figure 3-2 - Mode of transport used by respondents to reach Hadley DC



3.7 Telford and Wellington were identified as DCs regularly visited by 62.7% and 51.5% of Hadley's respondents respectively. Donnington was also a popular DC, regularly visited by 15.7% of respondents.

3.8 The predominant reason for using other DCs was to do weekly grocery shopping (88.6%). Other reasons cited include top-up shopping (65%), financial services (59.3%) and specialist shops (52.8%).

Spend

3.9 Mean spend in Hadley is low; it is below the total DC average in every category of spend, except top-up shopping (see Table 3-1). Mean spend on weekly shopping is almost 80% less than the average across all DCs.

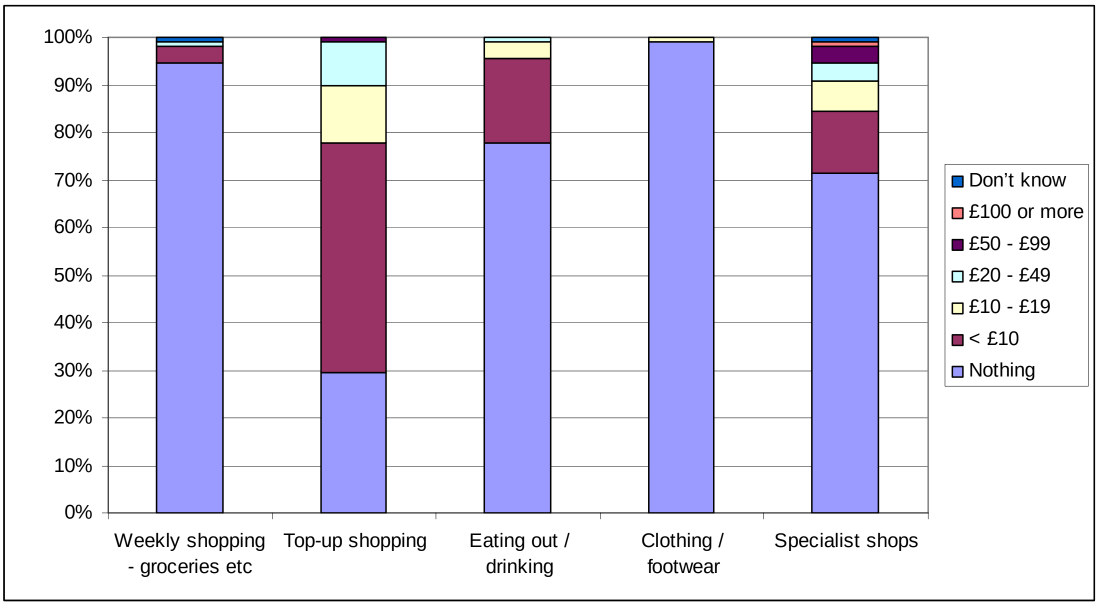
3.10 Over 16% of respondents do not spend any money in Hadley DC; the highest proportion of respondents to spend nothing across all DCs surveyed. 62.7% of respondents spend under £20, of which 60% spend less than £10.

Table 3-1 - Mean expenditure of shoppers in Hadley DC

Spend type	Mean spend (£)
Weekly shopping - groceries etc	0.51
Top-up shopping	8.04
Eating out / drinking	1.74
Clothing / footwear	0.13
Specialist shops	7.08

3.11 Figure 3-4 below confirms the tendency of shoppers in Hadley to spend very little, particularly on weekly shopping and clothing / footwear, on which 94% and 99% of respondents respectively spend nothing.

Figure 3-4 - Respondent spend, by category



Night usage

3.12 A below average proportion of respondents use Hadley DC at night (17.9%), mainly to go for a drink (70.8%), eat out (45.8%) or get a take away (25.0%).

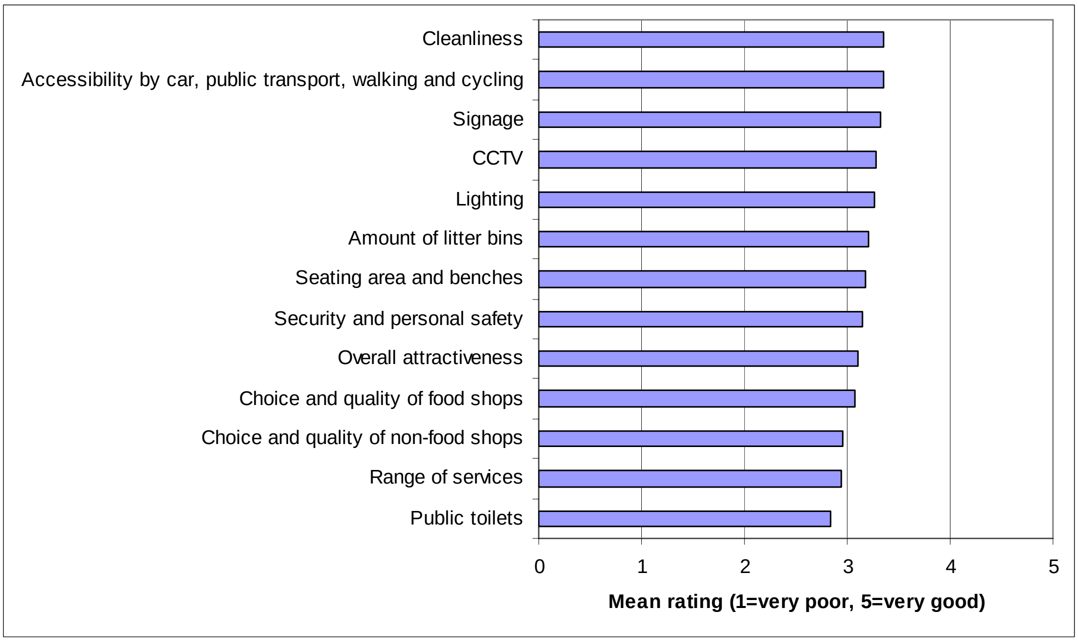
3.13 The main reason discouraging 82.1% of respondents from using the DC at night was the lack of anything of interest (72.7%). Contributory factors also included groups of youths causing a nuisance (16.4%) and a fear of robbery (13.6%).

3.14 The majority of respondents feel safe in Hadley DC at night (83.4%), which is above the average for all DCs surveyed. Of the 12.5% of respondents who feel unsafe in Hadley at night, two-thirds attribute this to a fear of street robbery and physical assault.

Satisfaction ratings

3.15 As illustrated by Figure 3-5, respondents in Hadley are satisfied with the cleanliness and accessibility of the DC. Key areas highlighted for improvement are the range and quality of shops (food and non-food) and services, and the provision of toilet facilities.

Figure 3-5 - Mean rating of Hadley DC by shopper survey respondents

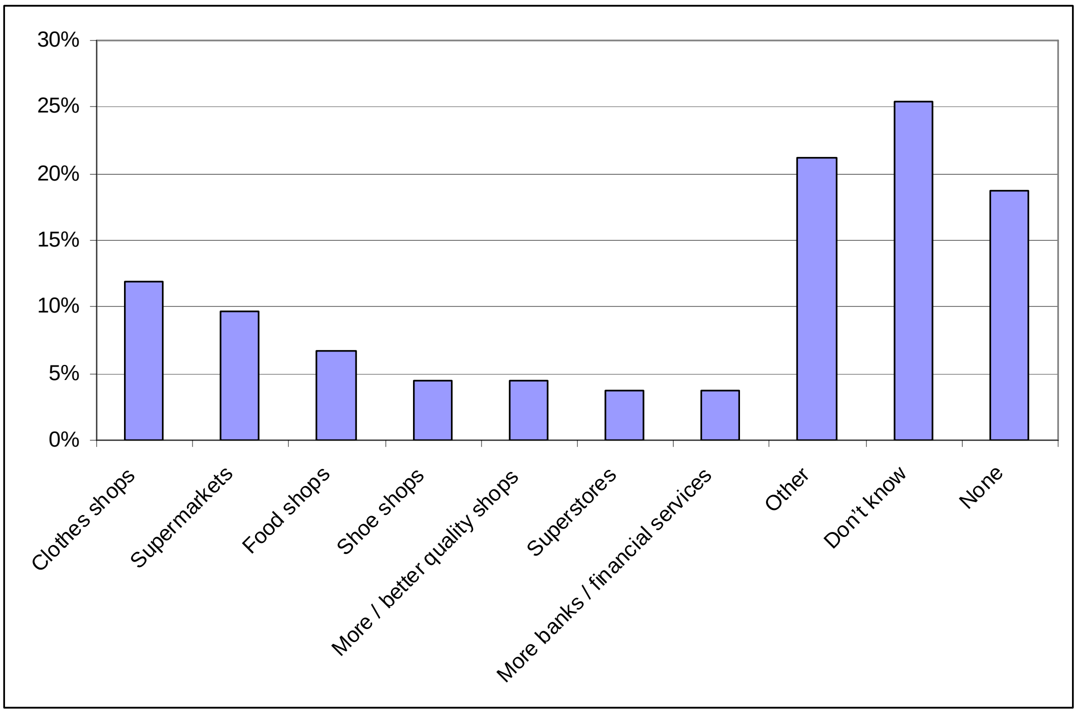


Suggestions for the future

3.16 Figure 3-6 overleaf illustrates the most common suggestions made by respondents to improve Hadley District Centre in the future. The 'other' category includes all ideas which were raised by 2% or less of the sample.

3.17 Almost one fifth of respondents would like more supermarkets and food shops in Hadley DC, which reflects the tendency of shoppers to travel to Telford, Wellington or Donnington to do their main weekly grocery shopping. An increase in clothes / footwear shops and financial services may also reduce the extent to which respondents travel elsewhere rather than using Hadley DC.

Figure 3-6 - Additional shops and services that respondents would like to see in the future

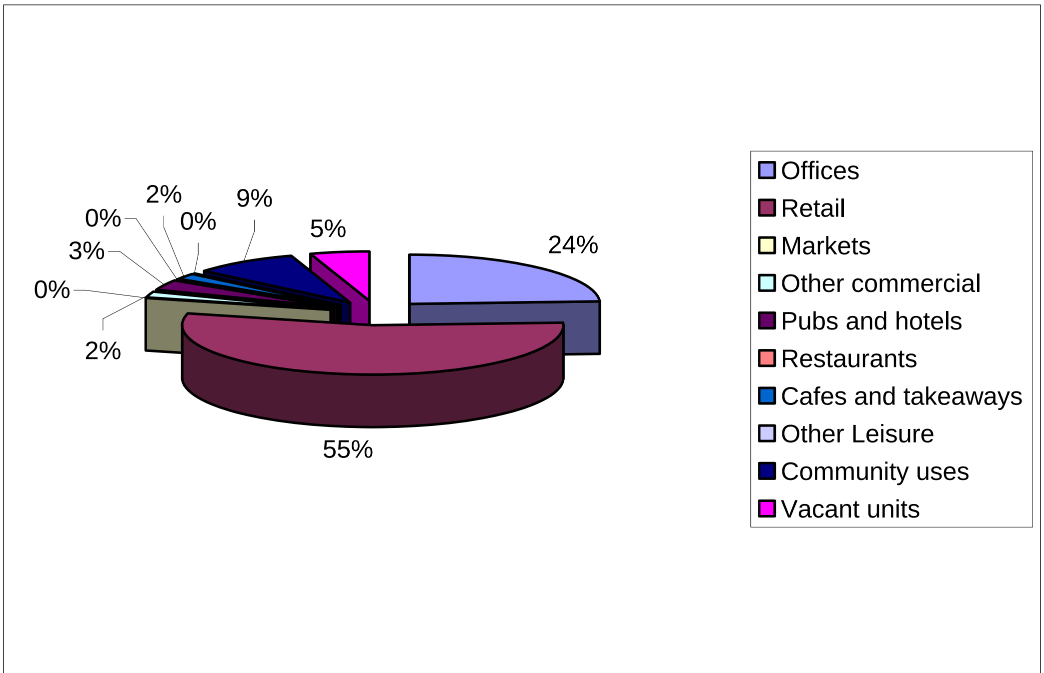


4 Retail space

4.1 Figure 4-1 shows the current breakdown of commercial property space within Hadley DC. Approximately 55% of the centre's accommodation is occupied by retail users and nearly a quarter by offices.

4.2 A visual conditions analysis of the commercial properties within the centre indicated that nearly 90% of properties were in an 'average' or 'good condition'. Only 13% were considered to be in a 'poor' state of upkeep, whilst none were considered to be 'very poor'.

Figure 4-1- Commercial space usage in Hadley



Local Property Market

4.3 Hadley is a small, local centre, with most activities taking place on Wednesdays (the weekly market day). The Camping and Caravanning Centre attracts a number of leisure users / shoppers on Fridays and at weekends. Core data on the local property market is set out in Table 4-1.

Table 4-1 – Hadley DC Property Market Data

Hadley Property Market	Key issues
Retail rents	£15 ZA in prime areas; overall approximately £8 ZA
Retail use – supply and demand	The retail area is concentrated in a small shopping precinct in the heart of the centre, which dates from the 1960s. A number of

	voids are apparent, and take-up generally is low. With the possible exception of the chemist, there is no representation from the multiple retailers – occupiers tend to be highly localised
Office rents	Rents in Badhan Court (see below) achieve £9 psf, but are considerably lower in other office premises
Office use – supply and demand	There is very little space available within Hadley's central precinct, apart from a few small suites at first floor level, for which there is limited demand (access is poor). On the edge of the centre however, is Badhan Court, a well-let purpose built office development providing good quality accommodation on flexible terms in low rise blocks
Leisure rents	N/a
Leisure use – supply and demand	There is a relatively new Cultural and Leisure Centre
Residential values	Terraced houses (2 bed) - £100,000 Detached houses (3 bed) - £160,000

Retailer Surveys - Comments on Hadley

4.4 Although there is a large camping and caravanning retailer in the centre, retail interviews suggest that the majority of shoppers visit Hadley for low-order convenience shopping. The Wholesale Meat Market is considered one of the strongest draws, and attracts customers with its widespread local advertising. The proposed development of Telford Town Centre is not expected to have detrimental consequences for Hadley, as the latter's catchment area is so localised. In contrast, however, the possible introduction of car parking charges is considered a very real and serious threat to the centre's future. Other problems cited within the centre include:

- The physical fabric of the main precinct, which is perceived to be outdated and tired

- The centre's upkeep, which is considered to be generally unkempt and litter strewn

- The centre's public space, which was viewed as being of poor quality.

5 Projections

Assessment of low, mid and high turnover / floorspace projections

5.1 Retail turnover and the amount of floorspace dedicated to retail and other uses through to 2011 has been determined in accordance with the generic methodology attached as Annex A.

5.2 The initial step is to calculate the current 'retained' retail spend within the centre – in other words the level of retail spend within Hadley centre which emanates from Hadley residents (shown in the table below). In order to avoid 'overlapping' between District Centres, the analysis set out below is focussed on the wards of Hadley and Leegomery, in which the District Centre is located, and not the wider catchment area identified by the Shopper Survey, which includes Ketley and Oakengates ward (in which Oakengates is situated). On this basis, the spend level is shown below in Table 5-1, sub-divided between retail and leisure spend.

Table 5-1 - Annual expenditure Hadley residents (2003)

Hadley District Centre	Total Estimated Annual Spend
Total Composite Spend	£48.93m
Total Retail Spend	£34.41m
Total Leisure	£14.52m

5.3 Table 5-2 sets out the spend levels that occur within Hadley District Centre itself. Given the centre's relative proximity to Telford Town Centre, Wellington and Wellington Retail Park, and the fact that most of the local customer base visit the centre on foot, the retention of convenience retailing within Hadley is considered to be relatively low. Comparison retailing also showed poor retention – although this is probably at least in part due to the centre's limited offer. Similarly, leisure outlets (particularly food and drink), which are poorly represented, also demonstrate low retention.

5.4 Externally generated spend is also very low (again due to the factors listed above), but an allowance has been made for the wider appeal of the Wholesale Meat Market and Camping and Caravanning Centre (calculated as 1% from Wellington, 1% from Oakengates and 1% from Donnington). The total current turnover for Hadley is set out in Table 5-2 below, together with the split between the 3 main categories of spend and floorspace.

Table 5-2 – Total Hadley DC turnover

Hadley District Centre	%'age Spend between Sectors	Total Estimated Turnover
Total Hadley Turnover		£9.21m
Comparison Goods	48%	£4.39m

Convenience Goods	44%	£4.08m
Leisure Spend	8%	£0.72m

5.5 Check calculations have been undertaken to confirm that the turnover figures which have been adopted are broadly representative of the businesses operating there. The calculations take account of known turnover figures (as a result of occupier interviews, etc.) and a comparison of floorspace / rental levels against the turnovers of businesses in occupation.

5.6 The total turnover estimate arising from this calculation is £9.33m (compared with the £9.21m identified above). This represents a good match (ie. it substantiates our assumptions on leakage). In order to provide a single working assessment of turnover in order to project future trends therefore, we have adopted £9.21m as our base figure.

Trend analysis – demographics / floorspace

5.7 In order to understand the likely performance of the Centre in the period to 2011, consideration has been given to critical trends over the last 10 years – which will continue to influence the nature of the Hadley population base, disposable income levels, the composition of households, etc. These are set out in Table 5-3 below.

Table 5-3 – Population and income data

Population	**1991**	**2001**	**Change**	**% Change**
Total	10,365	10,117	-248	-2%
Split for Age				
under 16	2,568	2,597	29	1%
16-29	2,333	1,821	-512	-22%
30-64	4,163	4,502	339	8%
65+	1,304	1,197	-107	-8%
Split by economically active				
Total active	4,910	4,573	-337	-7%
Full-time	3,361	3,132	-229	-7%
Part-time	629	705	76	12%
Split by housing tenure				
Total households	3,918	4,021	103	3%
Total owner-occupier	2,384	2,443	59	2%
Total private sector rental	189	238	49	26%
Total public sector rental	1,347	1,174	-173	-13%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	392.52	351	-42	-11%

5.8 It will be seen that this table demonstrates some important trends which are likely to influence the centre's future performance. For example, population figures overall have declined very slightly (2%) over the ten years to 2001. Within the population base however, there has been a significant decrease within the 16-29 year working age group (22%) and a minor decrease in the 65+ year age group (8%). In contrast, there has been a small increase in the 30-64 year working age group (8%).

5.9 There have also been some significant moves within the housing stock. Total households have increased slightly over the study period (3%), but a decline in the public sector rented stock (13%) has been outweighed by a substantial rise in the private rented stock (26%). Finally, income levels for the period 2002 - 2003 have shown a significant drop of 11%.

5.10 Projecting these trends through until 2011 produces the results set out in Table 5-4 below. The impacts these projections will have on the centre can be categorised through increased disposable income levels. Estimates have been made of the increased retail expenditure likely to flow from the anticipated rise in households. These have then been used to inflate the overall expenditure level which might be expected within Hadley over the next five years.

Table 5-4 – Population and income projections (2011)

Population	**2001**	**2011**	**Change**	**% Change**
Total	10,117	9,875	-242	-2%
Split for age				
under 16	2,597	2,626	29	1%
16-29	1,821	1,421	-400	-22%
30-64	4,502	4,869	367	8%
65+	1,197	1,099	-98	-8%
Split by economically active				
Total active	4,573	4,259	-314	-7%
Full-time	3,132	2,919	-213	-7%
Part-time	705	790	85	12%
Split by housing tenure				
Total households	4,021	4,127	106	3%
Total owner-occupied	2,443	2,503	60	2%
Total private sector rental	238	300	62	26%
Total public sector rental	1,174	1,023	-151	-13%
Income	**2002**	**2003**	**Change**	**% Change**
Total gross weekly pay	393	351	-42	-11%
Increase in retail expenditure for households				
Owner - occupied		£7,417		£0.45m
Market rent		£12,379		£0.76m
Total increased expenditure				**£1.21m**

5.11 The calculations to apply retention levels of spend within the district and take account of incoming expenditure from the residents outside the district (which, as before have been calculated as 1% each from Wellington, Oakengates and Donnington – based on their individual medium projections), have been re-run to take account of the above increases.

5.12 Apart from the inherent "medium" projection impacts on Hadley as a result of the trend analysis – there is also another major 'driver of change' in the area over this next 5 year period, not picked up by the 'straight line' projections discussed above.

5.13 This relates to the major development of the East Ketley millennium village community, immediately south of Hadley, which is expected to have an impact upon the levels of retained spend within the District Centre. We understand that 700 new residential units are proposed here, with occupation likely to commence late 2006 / early 2007. It is anticipated that during the study period to 2011, there will be an additional 300 – 400 new units occupied here - but there is unlikely to be any significant, dedicated retail development undertaken as part of this scheme. These new households will therefore feed directly into the existing local centre.

5.14 In order to consider the quantum of spend attracted to Hadley from the new East Ketley development, its impact must be viewed alongside the attraction of the adjoining centres of Oakengates and Wellington, as well as Telford itself. Although it is expected that the majority of spend will flow to these larger, more diverse centres, the influence of the existing community and public leisure facilities, alongside the niche retailing attractions in Hadley are expected to attract a small level of additional spend.

5.15 This has resulted in a revised level of total turnover for Hadley as set out in the table below – the figure, as before, being sub-divided between convenience, comparison and leisure expenditure. The conversion factor for this expenditure into floorspace has also been re-run and the revised floor space calculations for the centre provided to reflect the medium position at 2011, see Table 5-5.

Table 5-5 – Medium projections

Hadley District Centre MEDIUM PROJECTIONS 2011	%'age Spend between Sectors	Total Estimated Turnover	Total Floorspace Estimates (sq ft)
Total Hadley Turnover		£10.33m	51,000
Comparison Goods	48%	£4.94m	37,500
Convenience Goods	45%	£4.60m	9,300
Leisure Spend	8%	£0.78m	4,200

Low Projections

5.16 In order to assess the potential for low projections within the centre, it is assumed that the demographic and household forecasts set out above have a direct impact on the performance of the centre as a whole – but are not increased by the influence of trade captured from the new East Ketley development. The low scenarios projected for the other centres are however incorporated into this scenario.

5.17 In these circumstances overall expenditure is reduced across all categories, when compared to the medium scenario - this would result in a number of vacancies within the portfolio, as operators experience lower trading levels.

5.18 A number of specific niche retailing outlets however would not be so influenced by these trends – in particular the meat wholesaler and the camping and caravan operator. The leisure and sporting aspects of the centres activities would also see little change in turnover.

5.19 In terms of a changing role for the centre, under these circumstances, it is considered that the vacated premises would either be converted into residential accommodation (there are already examples of previous commercial premises coming forward for residential purposes) or for small business use (for which there is already an apparent demand in the centre).

5.20 These projections have been re-cast and result in the following turnover and floorspace levels for the centre in this scenario as at 2011, see Table 5-6.

Table 5-6 – Low projections

Hadley District Centre LOW PROJECTIONS 2011	**%'age Spend between Sectors**	**Total Estimated Turnover**	**Total Floorspace Estimates (sq ft)**
Total Hadley Turnover		£9.36m	46,200
Comparison Goods	48%	£4.47m	33,800
Convenience Goods	44%	£4.14m	8,400
Leisure Spend	8%	£0.74m	4,000

High Projections

5.21 As mentioned in the medium scenario above, the impacts of the East Ketley millennium village community and the increased spend levels of other centres (shown in their individual high projections), could in turn increase spend within Hadley. In addition to this profile, Hadley has already proved itself to be a popular location for small office / business users – who are attracted by its convenient location with ready access to major distributor roads around the northern districts of Telford.

5.22 There are a number of vacant / underused potential development sites available in the centre at present – which could be brought forward for small business accommodation – and provide a more diversified range of occupiers, as well as more of a catchment market for the existing retail outlets. For example there is no reason why the camping centre needs to remain in the heart of the District Centre – and could be part of a re-location package to alternative / more suitable sites within the immediate vicinity. There is also a generous allowance for car parking in the area at present – and perhaps one of the current sites could again be brought forward for these particular purposes.

5.23 These possibilities have been taken forward into the high scenario projections and the resulting figures with regard to estimated turnover and required floor space within the centre are set out in Table 5-7. Whilst an estimate of the total amount of new office floorspace that could be developed on the sites mentioned above, has been provided, it is not possible to provide information on turnover levels for office based businesses as this information is not available.

Table 5-7 – High Projections

Hadley District Centre HIGH PROJECTIONS 2011	**%'age Spend between Sectors**	**Total Estimated Turnover**	**Total Floorspace Estimates (sq ft)**
Total Hadley Turnover		£10.37m	60,000
Comparison Goods	48%	£4.95m	37,000
Convenience Goods	45%	£4.61m	9,000
Leisure Spend	8%	£0.78m	4,000
Office Space			10,000

5.24 It can be seen that these have a significant impact upon the requirements for the centre. Clearly, the projections have only been forecast up to 2011, but it is likely that these trends could continue particularly as the East Ketley development progresses and if the small business accommodation strand can be successfully capitalised upon.

Prognosis for Hadley DC

- Hadley is suffering a slight decline in population and income levels, although the number of households are expected to show a marginal increase

- The District Centre is itself suffering from a limited retail offer - and a proximity to the larger centres of Oakengates and Wellington (as well as Telford itself)

- There is however a strong move towards the concentration of community, leisure and sporting activities within Hadley – as well as a small business community and new residential development

- The impacts of the new East Ketley millennium village community immediately to the south should also have some impact as it develops over the next 10 years.

- Development of these strands should have the potential to develop / re-focus Hadley for leisure, community, sporting, small business and residential uses if land can be released and support given to change of uses