

# East Suffolk Town Centre Users Perception Survey

## Halesworth 2024



Prepared by:



Prepared for:



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October 2024



### **Research Methodology**

As part of a wider programme around town centre revitalisation, East Suffolk Council were looking to survey town centre users across 12 key towns & villages in East Suffolk. The aim of the study was to understand how and why people are using our town centre in order to support future intervention plans.

As part of the research plan, we interviewed consumers and businesses using a mixed methodology (face-to-face, online and telephone interviewing). Our surveys (consumer and business) were incentivised with a free prize draw.

We conducted face-to-face interviews with consumers at each of the 12 town centres. We created a QR code linked to the face-to-face consumer survey. Those wishing to take part in the consultation but unable to do so 'on the spot' were offered a chance to upload the survey onto their phones so that they could submit the responses in their own time.

Businesses were targeted via an online survey. We engaged with town centre businesses by using the existing local business networks and partnerships, with the support of the Economic Development and Communications Teams at East Suffolk Council. We then targeted businesses by phone as an additional resource for targeting specific town centre businesses in order to top up any towns which proved hard to reach using the online method mentioned above.

The results of the study are based on 1560 interviews with town centre users and 425 interviews with local businesses. The following table shows the sample for each individual town.

| Sample of interviews |             |            |
|----------------------|-------------|------------|
| East Suffolk Towns   | Consumers   | Businesses |
| Aldeburgh            | 125         | 36         |
| Beccles              | 125         | 42         |
| Bungay               | 110         | 34         |
| Felixstowe           | 170         | 43         |
| Framlingham          | 110         | 33         |
| Halesworth           | 110         | 32         |
| Leiston              | 110         | 34         |
| Lowestoft            | 215         | 42         |
| Saxmundham           | 110         | 41         |
| Southwold            | 140         | 35         |
| Woodbridge           | 157         | 37         |
| Wickham Market       | 78          | 16         |
| <b>Total</b>         | <b>1560</b> | <b>425</b> |

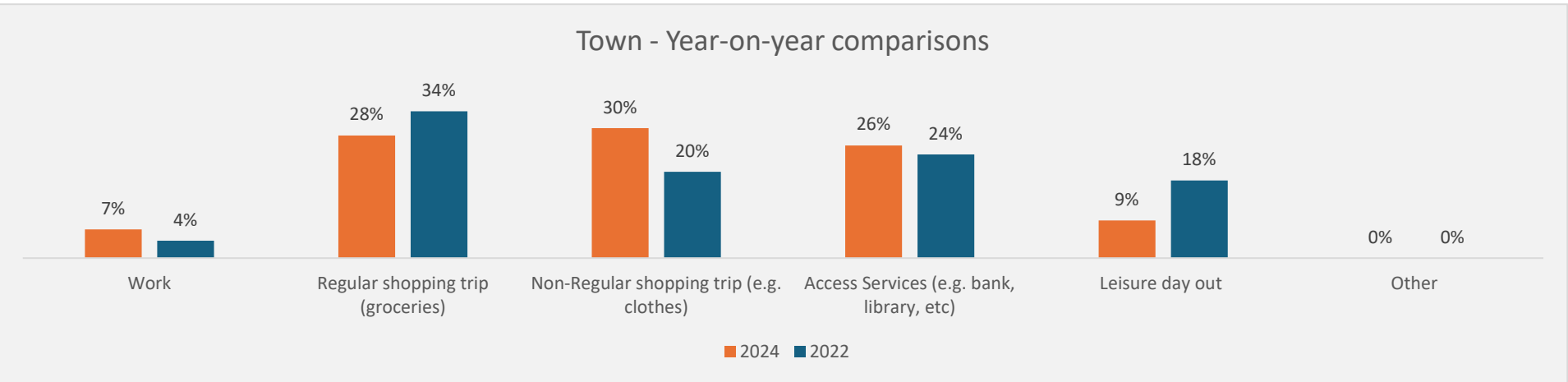
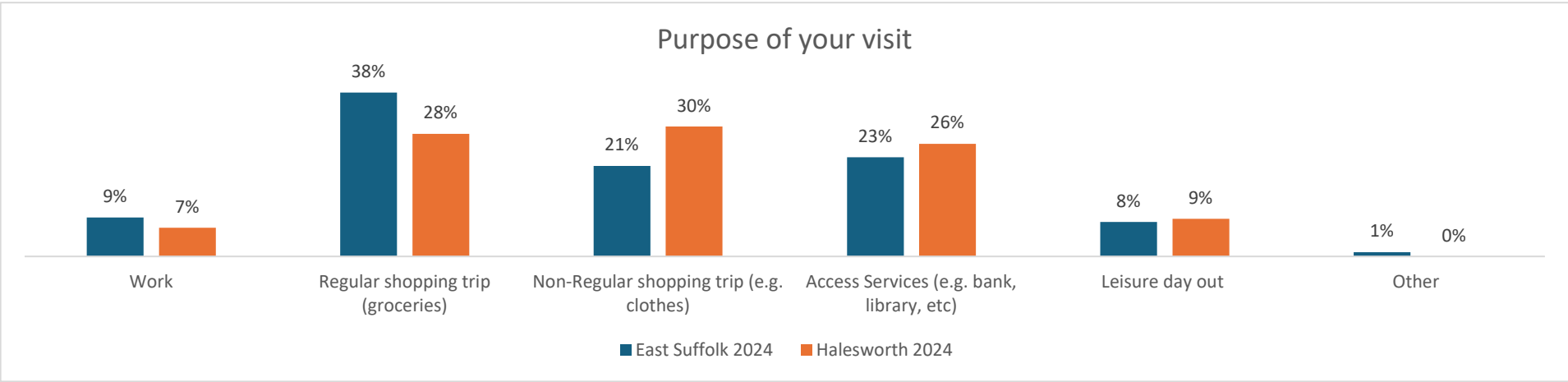
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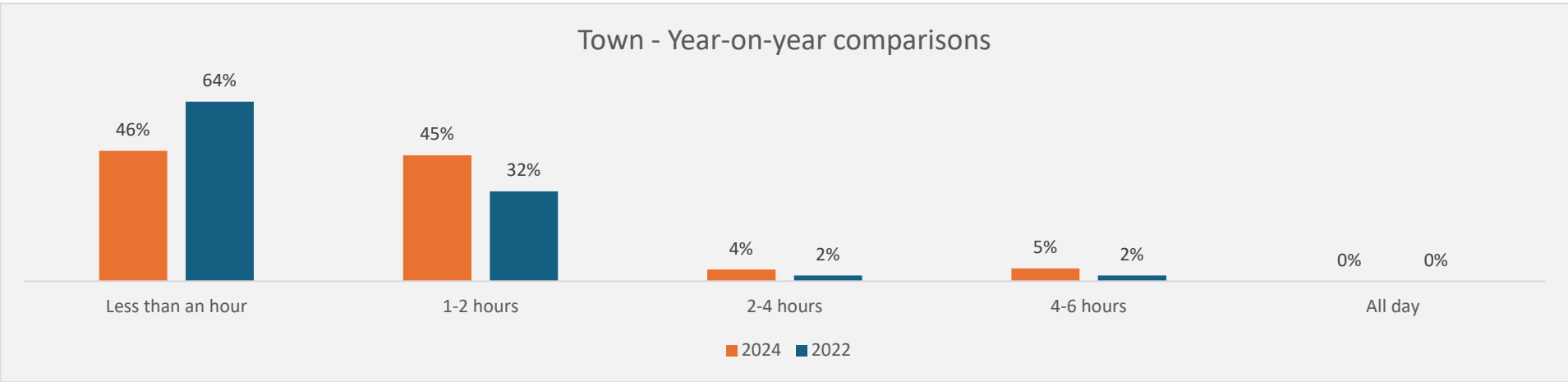
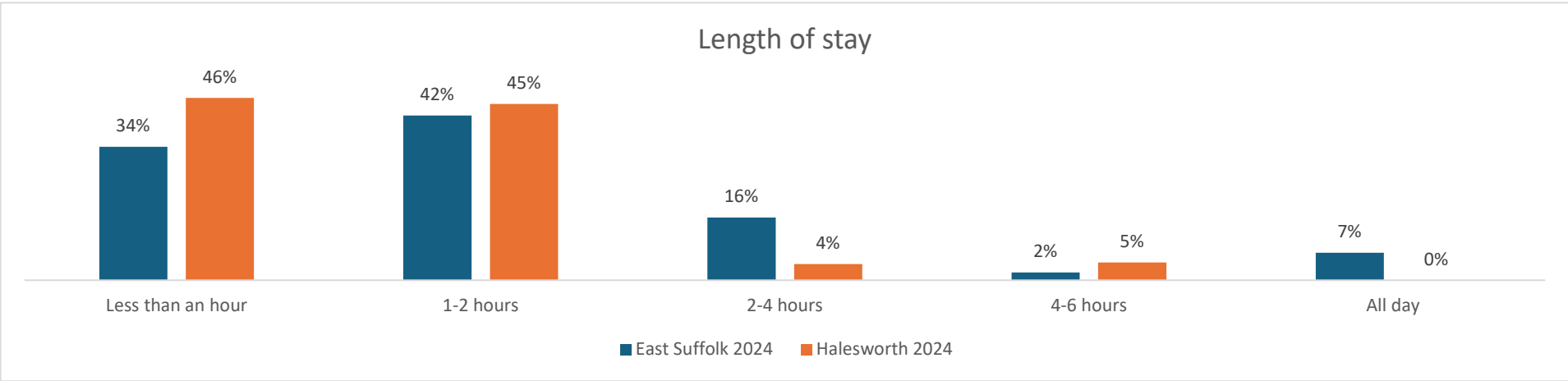
Town centre users – Trip characteristics

What is the main purpose of your visit to the town centre today?



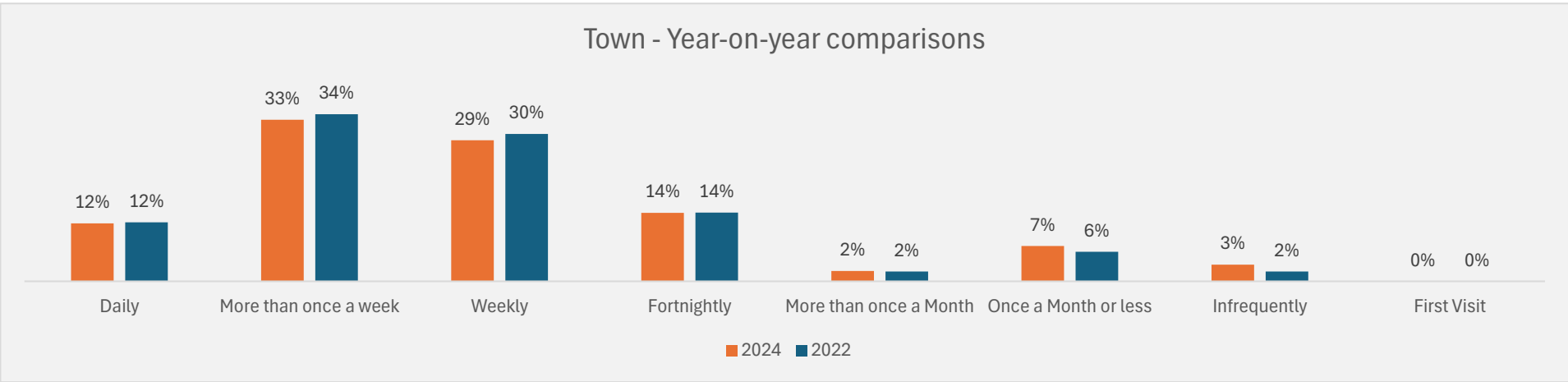
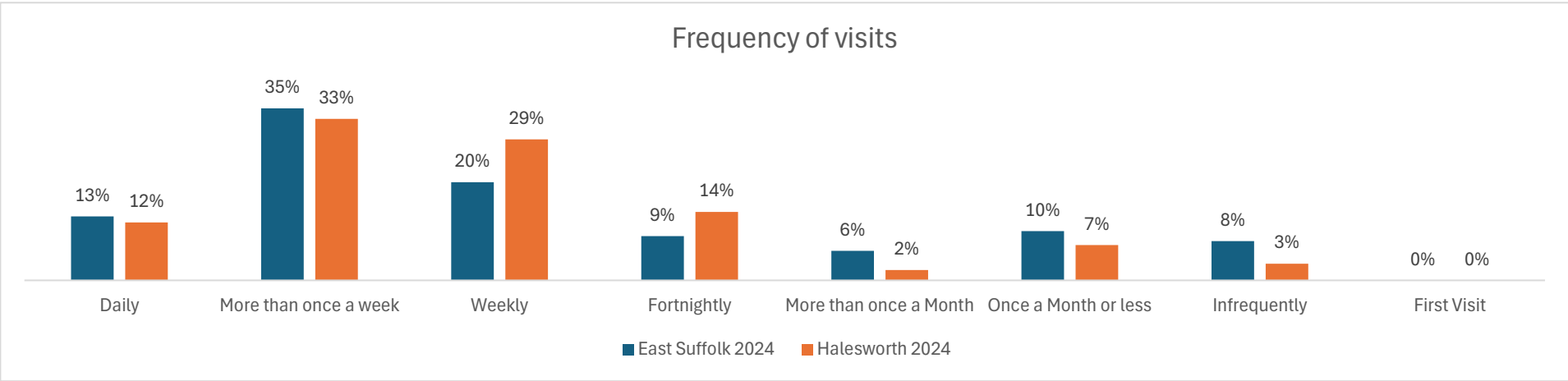
Town centre users – Trip characteristics

How long do you intend to stay on this visit to the town centre?



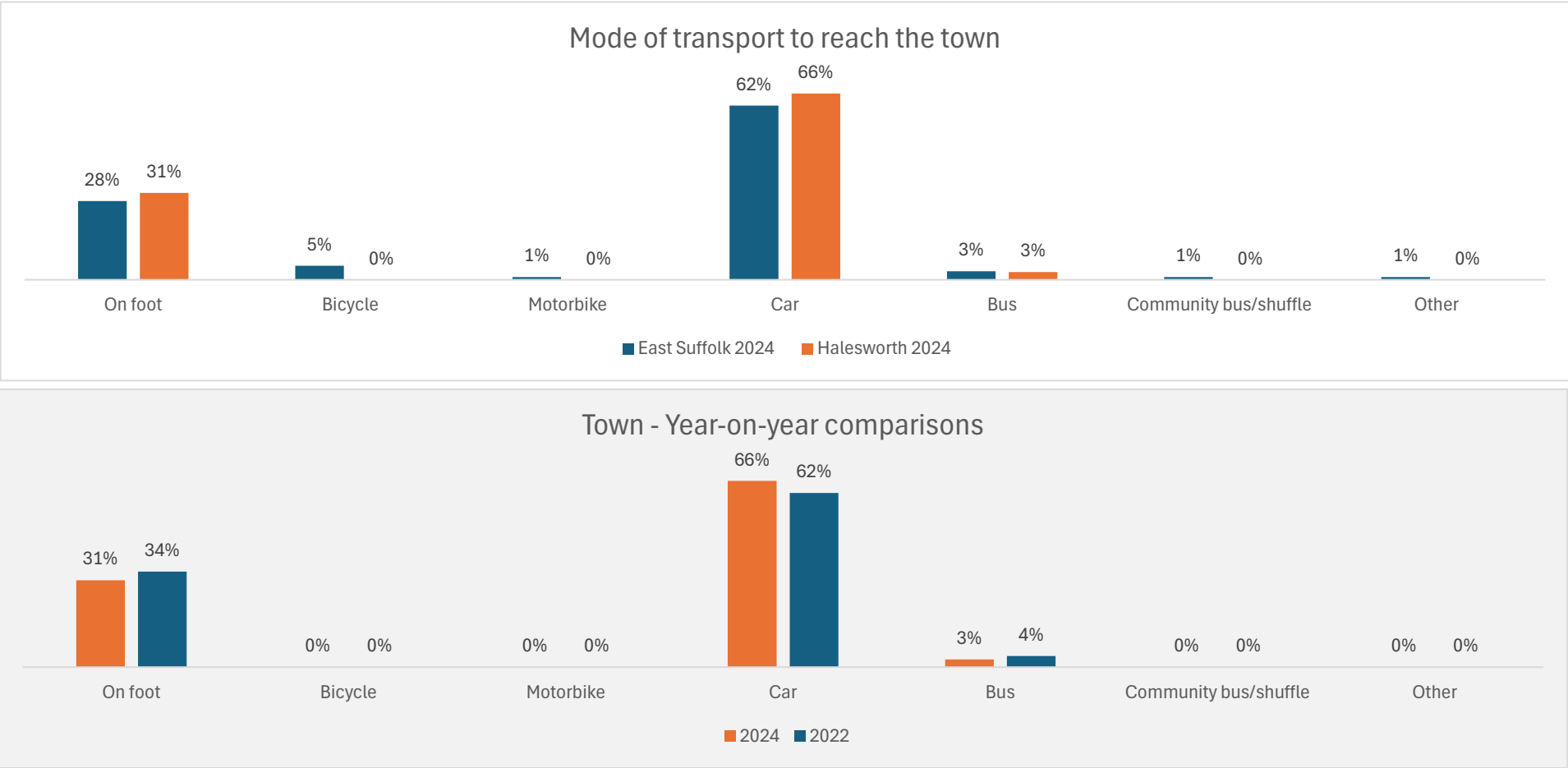
Town centre users – Trip characteristics

How often do you visit the town centre?



Town centre users – Trip characteristics

How did you travel into the town centre today?



## Town centre users – Trip characteristics

Including yourself, how many people in your party are male and female, and which of these age groups do they fall into?

| Halesworth 2024 |      |        |     | East Suffolk 2024 |      |        |     |
|-----------------|------|--------|-----|-------------------|------|--------|-----|
| Age             | Male | Female | All | Age               | Male | Female | All |
| 0-15            | 1%   | 1%     | 2%  | 0-15              | 2%   | 4%     | 6%  |
| 16-24           | 1%   | 0%     | 1%  | 16-24             | 2%   | 2%     | 4%  |
| 25-34           | 0%   | 0%     | 0%  | 25-34             | 2%   | 2%     | 3%  |
| 35-44           | 1%   | 1%     | 2%  | 35-44             | 2%   | 2%     | 4%  |
| 45-54           | 3%   | 9%     | 11% | 45-54             | 2%   | 5%     | 7%  |
| 55-64           | 5%   | 6%     | 11% | 55-64             | 8%   | 7%     | 16% |
| 65+             | 32%  | 41%    | 73% | 65+               | 27%  | 33%    | 61% |
|                 | 43%  | 58%    |     |                   | 45%  | 55%    |     |

Year-on-year comparison : Halesworth 2024

| 2024  |      |        |     | 2022  |      |        |     |
|-------|------|--------|-----|-------|------|--------|-----|
| Age   | Male | Female | All | Age   | Male | Female | All |
| 0-15  | 2%   | 4%     | 6%  | 0-15  | 3%   | 3%     | 6%  |
| 16-24 | 2%   | 2%     | 4%  | 16-24 | 3%   | 2%     | 5%  |
| 25-34 | 2%   | 2%     | 3%  | 25-34 | 3%   | 3%     | 6%  |
| 35-44 | 2%   | 2%     | 4%  | 35-44 | 6%   | 3%     | 10% |
| 45-54 | 2%   | 5%     | 7%  | 45-54 | 4%   | 5%     | 10% |
| 55-64 | 8%   | 7%     | 16% | 55-64 | 3%   | 5%     | 9%  |
| 65+   | 27%  | 33%    | 61% | 65+   | 30%  | 25%    | 55% |
|       | 45%  | 55%    |     |       | 54%  | 46%    |     |

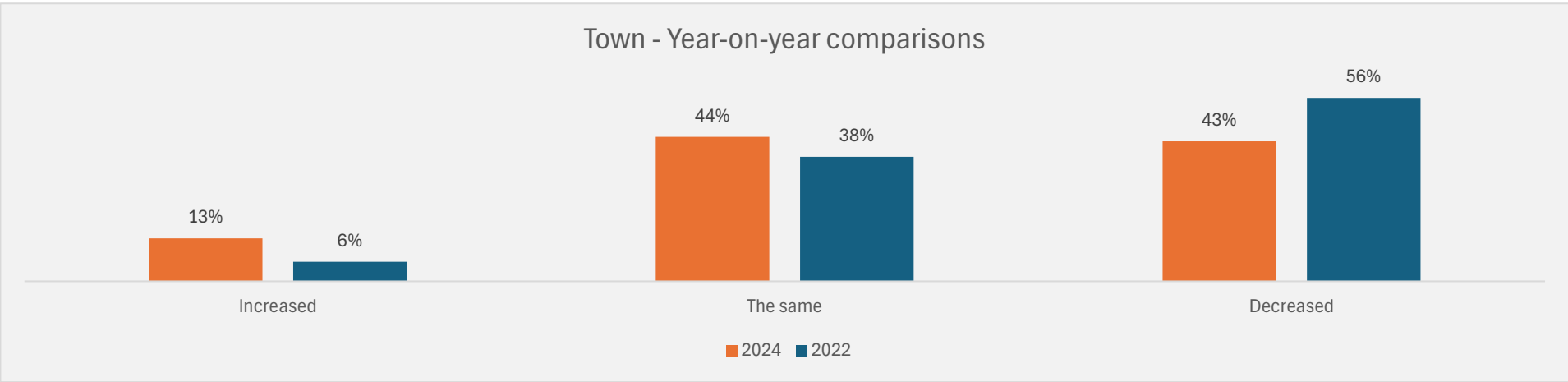
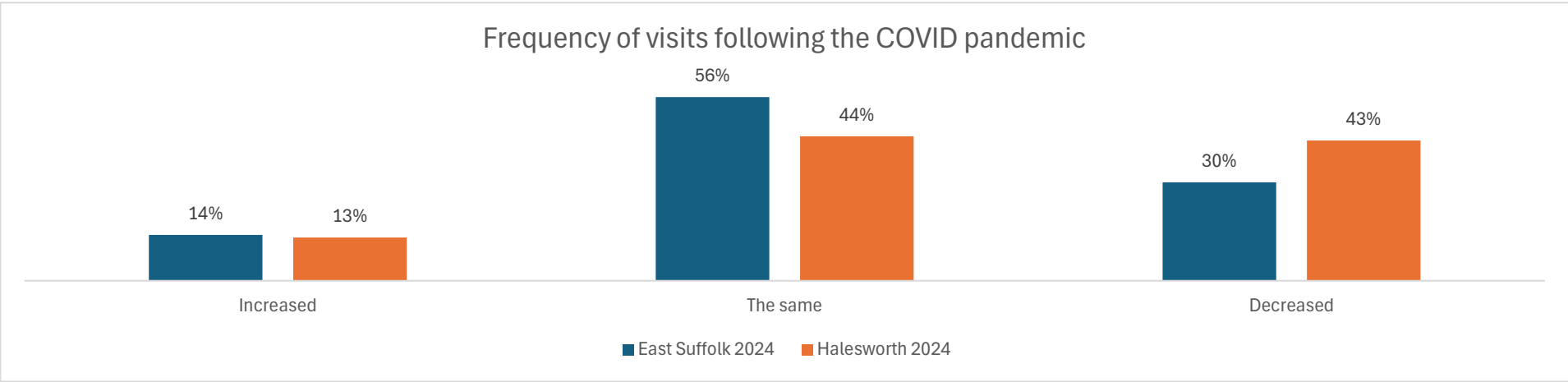
Town centre users – Trip characteristics

Including yourself, how many people in your party are male and female, and which of these age groups do they fall into? Thinking about today as a whole, how much do you expect that you and your immediate party will have spent on your visit to the town centre?



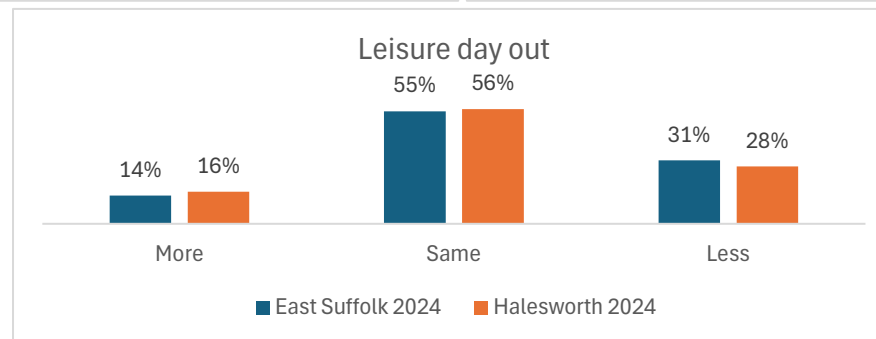
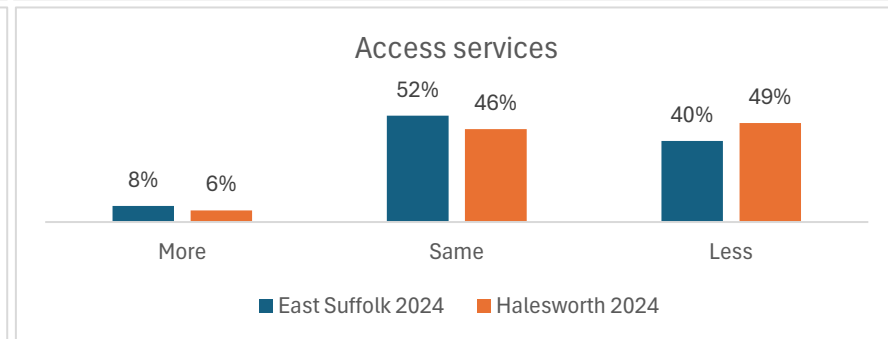
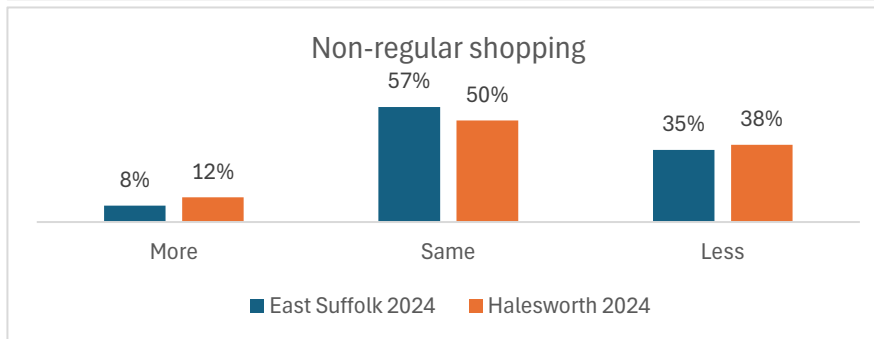
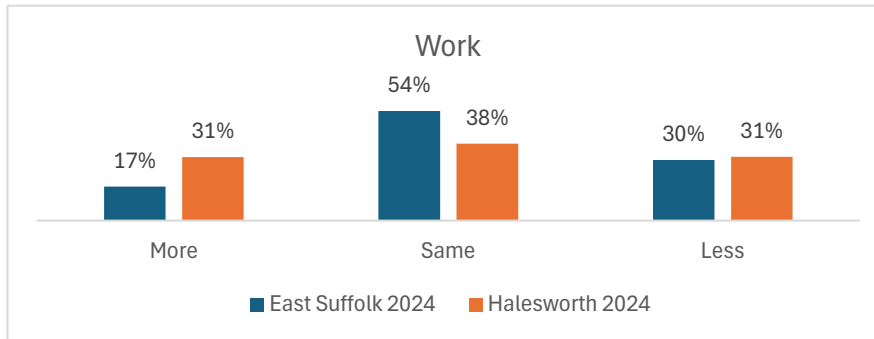
Town centre users – Trip characteristics

Would you say your frequency of visits to the town centre has increased, decreased or stayed the same since the start of the Covid-19 pandemic?



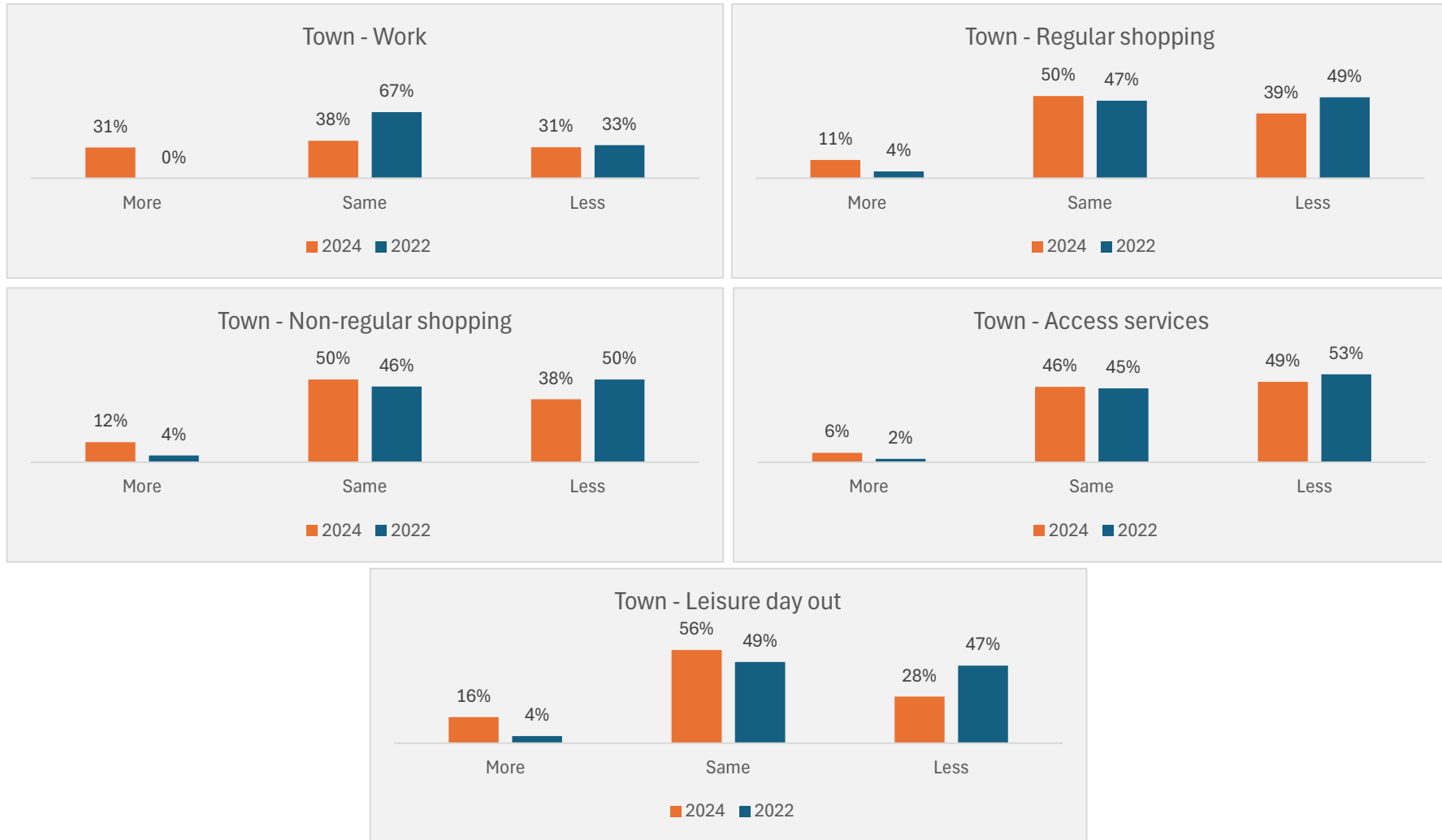
## Town centre users – Trip characteristics

Has the frequency of your visits changed since the start of the pandemic for any of the following trip purposes?



## Town centre users – Trip characteristics

Year-on-year comparison : Halesworth 2024



## Town centre users – Opinions and scores

**We are interested in your opinions about different aspects of the town centre. Please rate your satisfaction level based on this visit? Please rate your satisfaction levels for the following aspects of the town.**

*1 = Not at all satisfied, 5 = Very satisfied*

|                                           | East Suffolk 2024 | Halesworth 2024 |                     | East Suffolk 2024 | Halesworth 2024 |
|-------------------------------------------|-------------------|-----------------|---------------------|-------------------|-----------------|
| Groceries shops                           | 3.3               | 2.9             | Events              | 3.0               | 2.8             |
| Clothes, gifts etc.                       | 2.9               | 2.6             | Range of events     | 3.6               | 3.7             |
| Independent shops                         | 3.5               | 3.4             | Number of events    | 3.5               | 3.6             |
| National chains                           | 2.3               | 1.8             | Leisure facilities  | 2.7               | 2.1             |
| The Market(s)                             | 1.9               | 2.2             | Walking trails      | 3.7               | 3.5             |
| Pubs/ bars                                | 3.1               | 3.4             | Green spaces        | 3.8               | 3.8             |
| Cafes / restaurants                       | 3.7               | 3.9             | Cleanliness Streets | 3.2               | 3.1             |
| Places to Eat and Drink - Value for money | 3.3               | 3.2             | Customer Service    | 3.1               | 3.2             |
| Places to Eat and Drink - Range/Offer     | 3.6               | 4.0             | Access to services  | 2.9               | 2.1             |
| Road / Pedestrian Signs                   | 3.2               | 3.3             | Information & Maps  | 3.6               | 3.8             |
| Cycle lanes and bike racks                | 1.6               | 2.1             | Places to sit       | 3.6               | 3.6             |
| Public transport                          | 1.9               | 1.8             | Accessible toilets  | 3.4               | 3.6             |
| Car Parking                               | 3.0               | 3.3             | Feeling of safety   | 3.9               | 4.1             |
| Pavement surfaces e.g. raised areas       | 3.6               | 3.8             | Welcoming Feeling   | 3.6               | 3.6             |
| Dropped kerbs                             | 3.7               | 4.1             | Value for money     | 3.7               | 3.8             |
| Cultural activities                       | 2.8               | 2.5             | Quality experience  | 3.8               | 4.0             |

## Town centre users – Opinions and scores

Please rate your satisfaction levels for the town centre Halesworth 2024

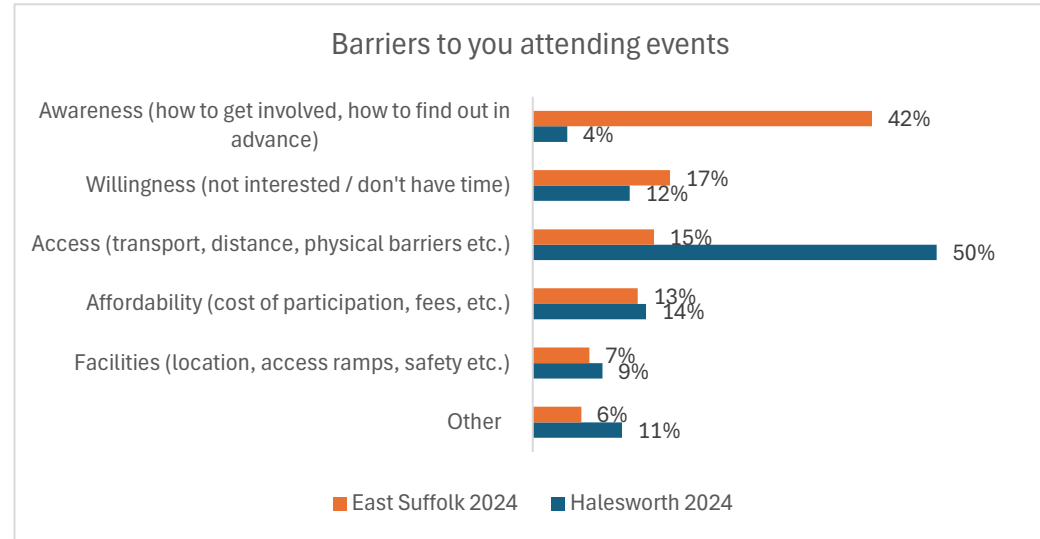
Year-on-year comparison :

1 = Not at all satisfied, 5 = Very satisfied

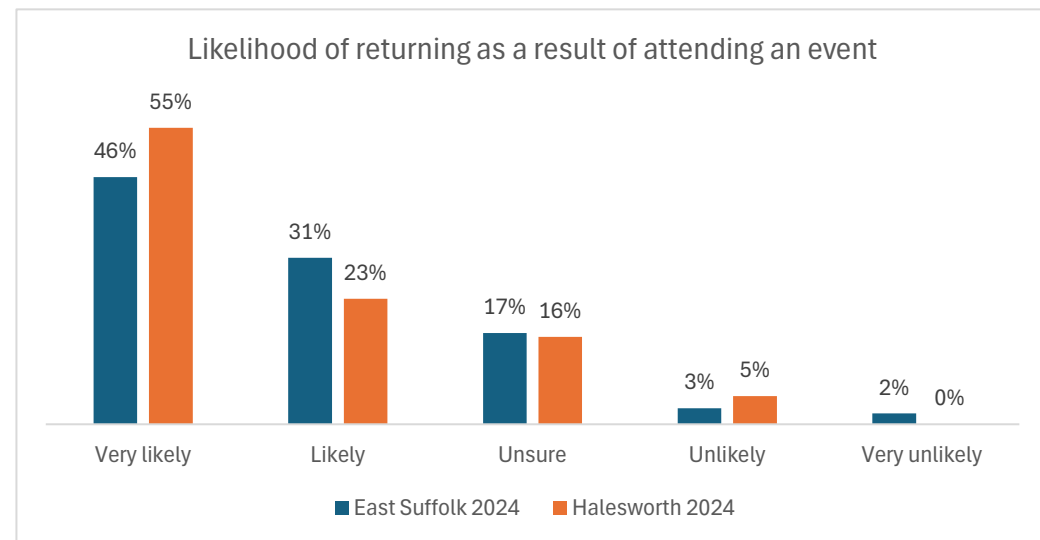
|                                           | 2024 | 2022 |                     | 2024 | 2022 |
|-------------------------------------------|------|------|---------------------|------|------|
| Groceries shops                           | 2.9  | 2.7  | Events              | 2.8  | 2.2  |
| Clothes, gifts etc.                       | 2.6  | 2.4  | Range of events     | 3.7  | N/A  |
| Independent shops                         | 3.4  | 3.3  | Number of events    | 3.6  | N/A  |
| National chains                           | 1.8  | 2.1  | Leisure facilities  | 2.1  | 2.1  |
| The Market(s)                             | 2.2  | 2.5  | Walking trails      | 3.5  | N/A  |
| Pubs/ bars                                | 3.4  | 2.9  | Green spaces        | 3.8  | N/A  |
| Cafes / restaurants                       | 3.9  | 3.2  | Cleanliness Streets | 3.1  | 3.6  |
| Places to Eat and Drink - Value for money | 3.2  | 3.2  | Customer Service    | 3.2  | 3.4  |
| Places to Eat and Drink - Range/Offer     | 4.0  | N/A  | Access to services  | 2.1  | 2.5  |
| Road / Pedestrian Signs                   | 3.3  | 3.4  | Information & Maps  | 3.8  | N/A  |
| Cycle lanes and bike racks                | 2.1  | 1.8  | Places to sit       | 3.6  | N/A  |
| Public transport                          | 1.8  | 1.7  | Accessible toilets  | 3.6  | N/A  |
| Car Parking                               | 3.3  | 3.0  | Feeling of safety   | 4.1  | 4.3  |
| Pavement surfaces e.g. raised areas       | 3.8  | N/A  | Welcoming Feeling   | 3.6  | 3.9  |
| Dropped kerbs                             | 4.1  | N/A  | Value for money     | 3.8  | N/A  |
| Cultural activities                       | 2.5  | 2.1  | Quality experience  | 4.0  | N/A  |

## Town centre users – Opinions and scores

**Are there any barriers to you attending events in the town?**

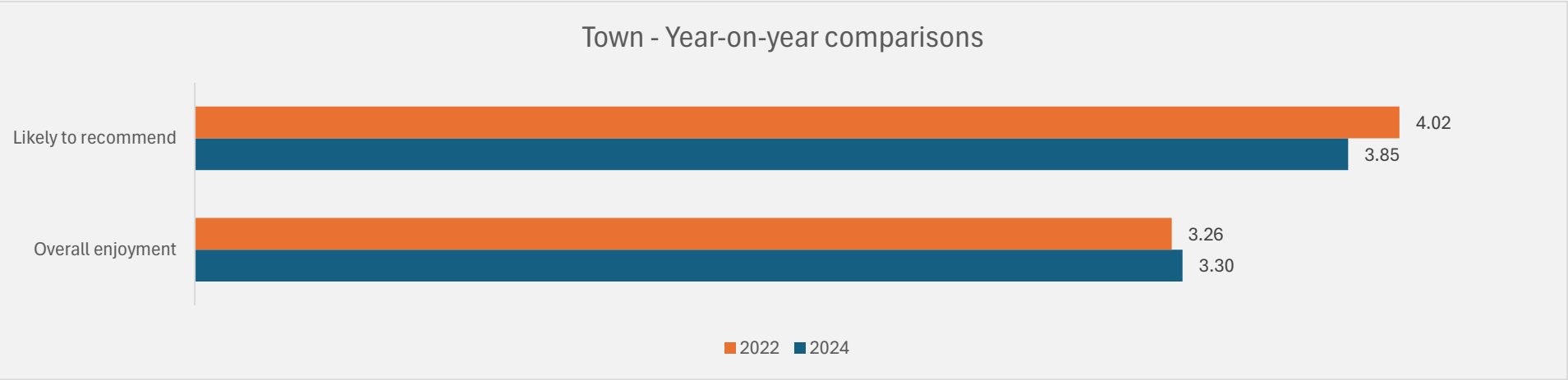
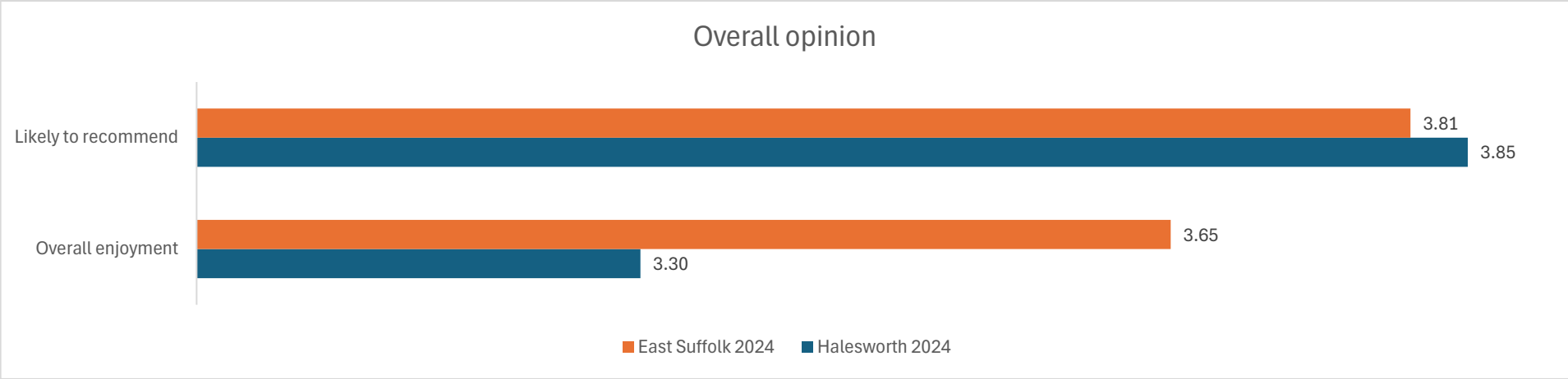


**As a result of attending the event(s), how likely are you to return to the town in the future?**



Town centre users – Opinions and scores

Taking everything into account, how would you rate the overall enjoyment of your visit today?  
How likely are you to recommend the area to someone else? (1 = Very Low, 5 = Very High)



## Town centre users – Opinions and scores

**As part of your visits to the town, how useful do you find the following:**

*(1 = Not at all useful, 5 = Very Useful)*

|                                                                                    | East Suffolk 2024 | Halesworth 2024 |
|------------------------------------------------------------------------------------|-------------------|-----------------|
| Web sites about the town or businesses to help plan your visit in advance          | 3.31              | 3.10            |
| Info on social media about businesses, products, places to eat, things to do, etc. | 3.48              | 2.79            |
| 'Click and collect' or the ability to browse products as part of your visit.       | 2.04              | 1.91            |
| Regular updates direct from businesses about special offers, things to do, etc.    | 2.79              | 2.72            |
| Free public WiFi in the town centre                                                | 3.22              | 3.30            |
| Visitor websites like the Suffolk Coast Ltd                                        | 3.04              | 3.32            |

## Year-on-year comparison : Halesworth 2024

|                                                                                    | 2024 | 2022 |
|------------------------------------------------------------------------------------|------|------|
| Web sites about the town or businesses to help plan your visit in advance          | 3.10 | 2.60 |
| Info on social media about businesses, products, places to eat, things to do, etc. | 2.79 | 2.64 |
| 'Click and collect' or the ability to browse products as part of your visit.       | 1.91 | 2.05 |
| Regular updates direct from businesses about special offers, things to do, etc.    | 2.72 | 2.38 |
| Free public WiFi in the town centre                                                | 3.30 | N/A  |
| Visitor websites like the Suffolk Coast Ltd                                        | 3.32 | N/A  |



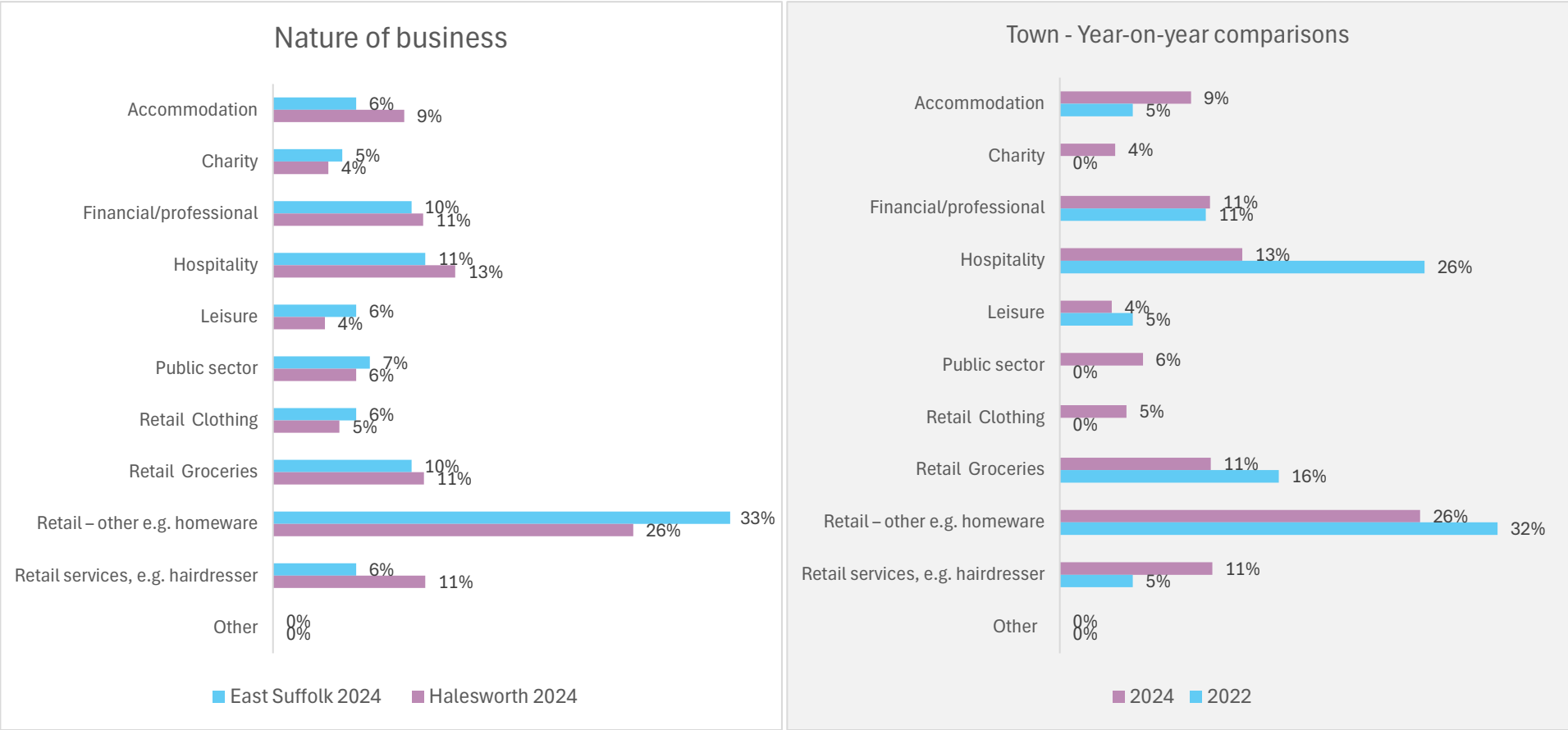
# Town Centre Businesses - Contents

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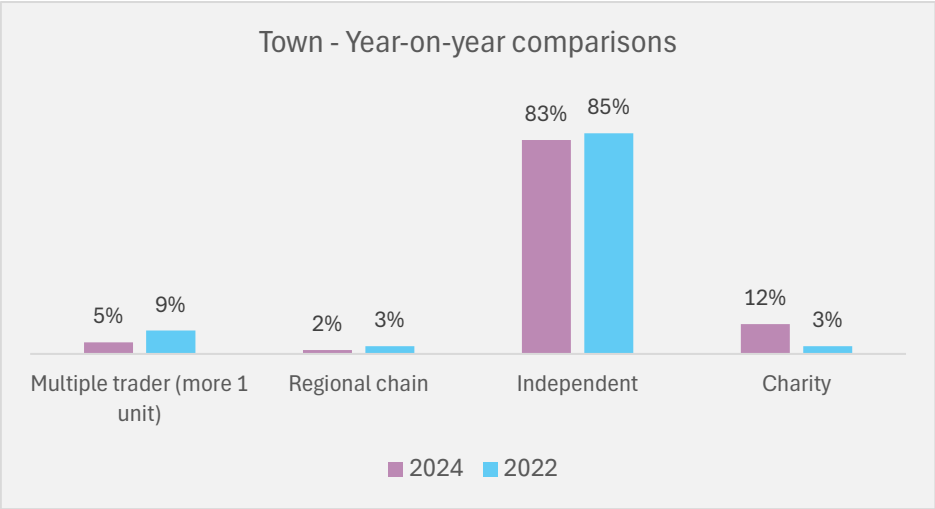
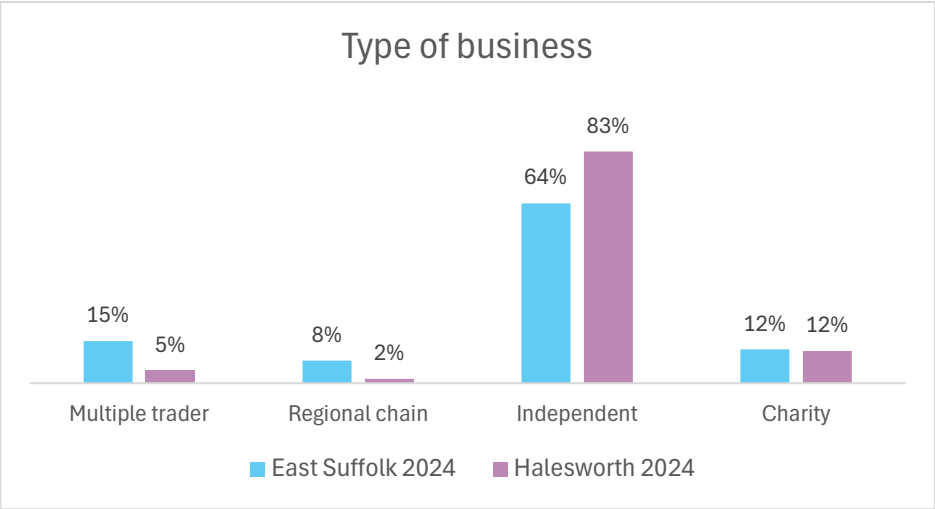


Town centre businesses – Business profile

What is the nature of your business?

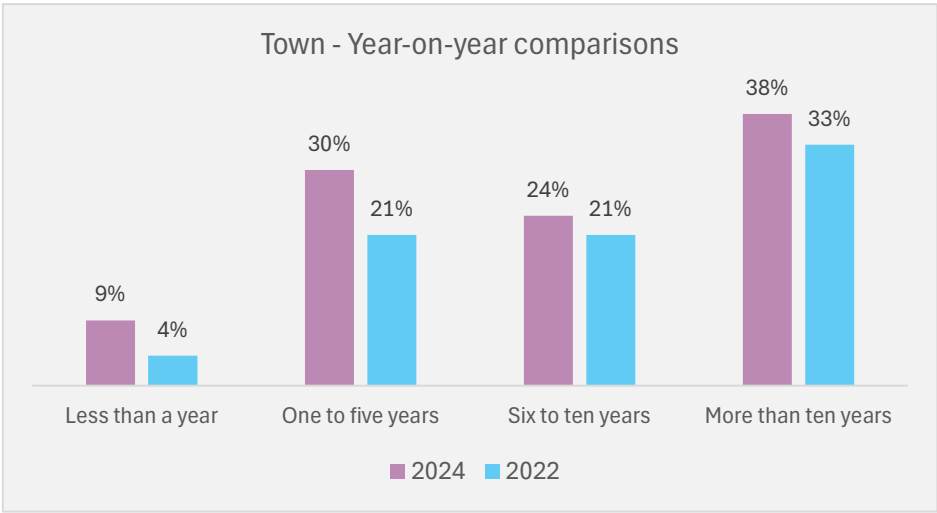
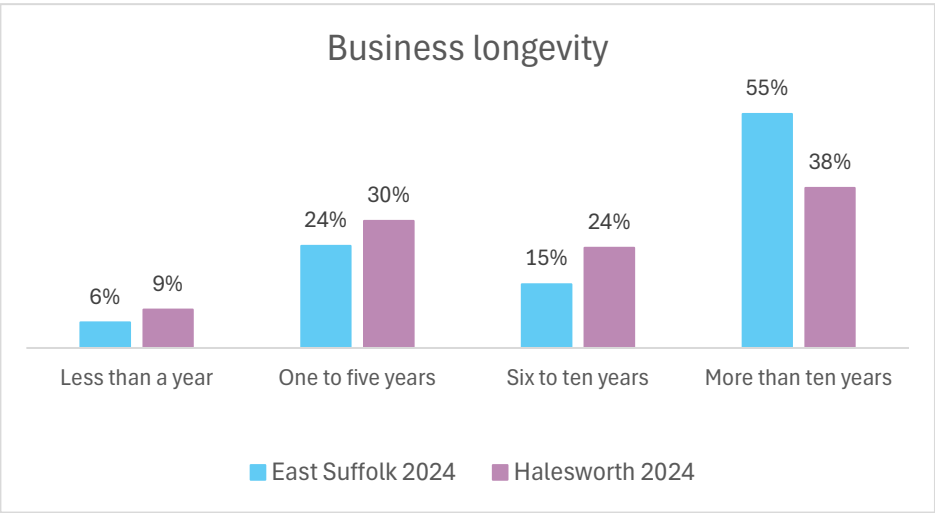


Town centre businesses – Business profile



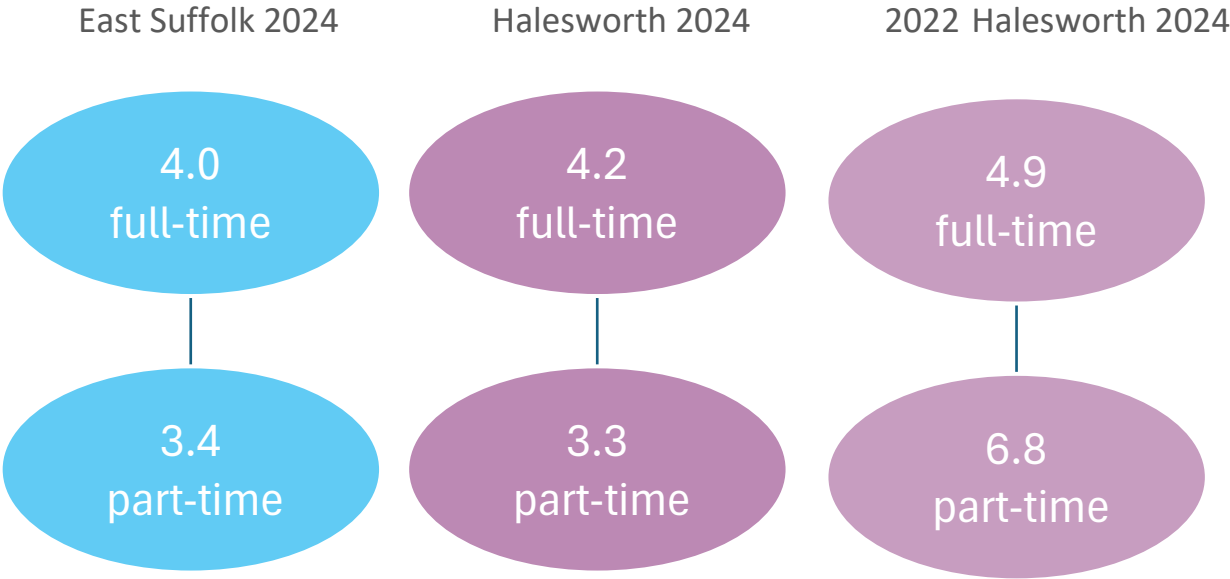
Town centre businesses – Business profile

What type of business are you? How long has your business been in the town?



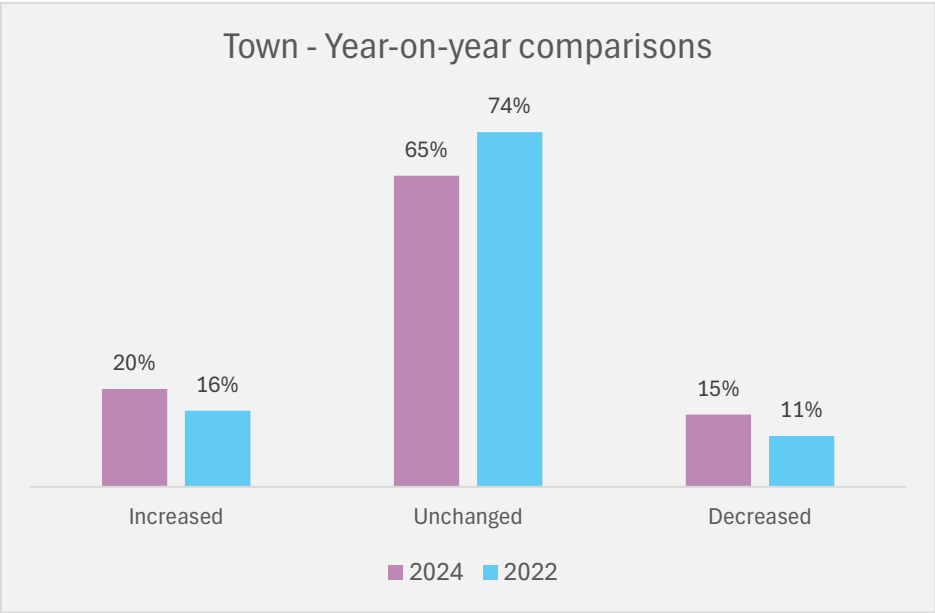
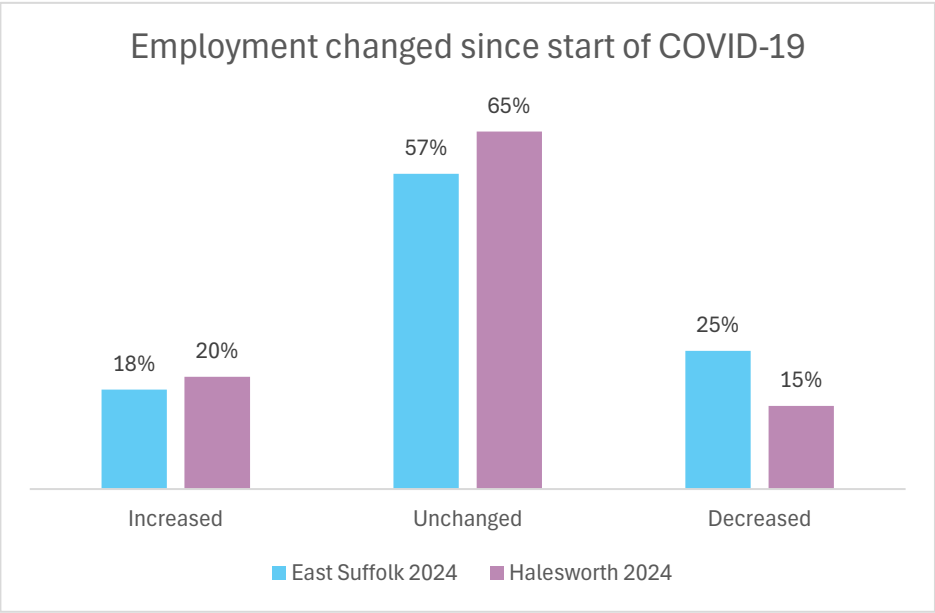
Town centre businesses – Business profile

How many people work at these premises?  
*(Including owners)*



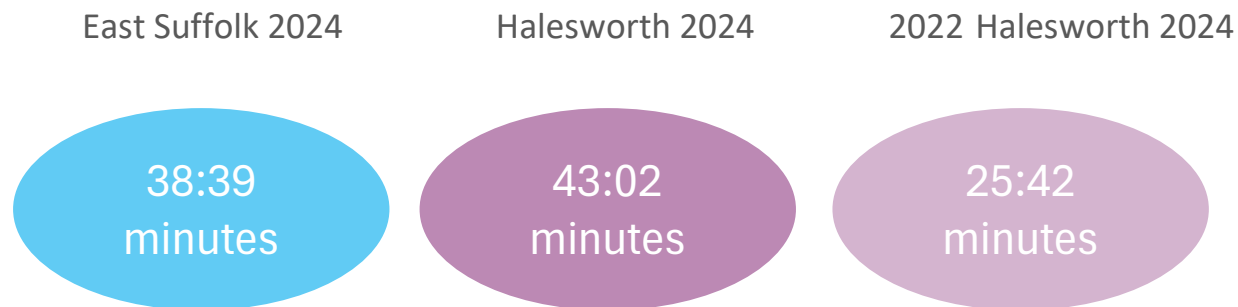
Town centre businesses – Business profile

Has this changed since the COVID-19 pandemic?



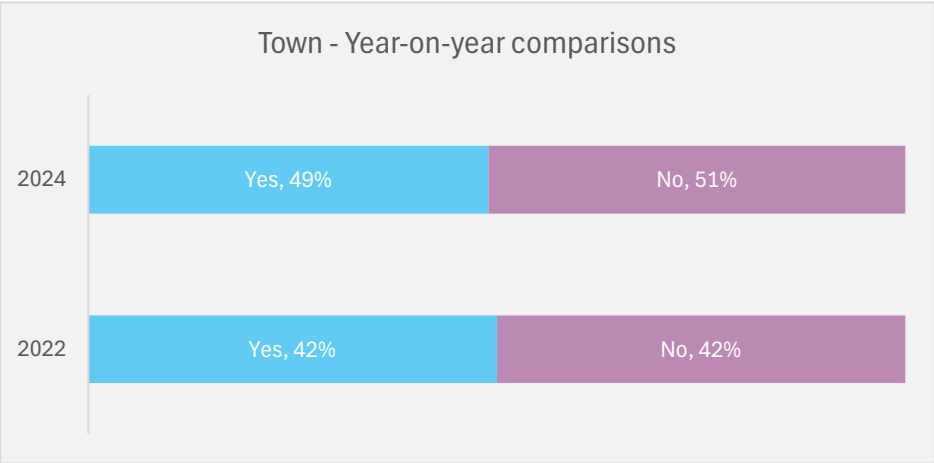
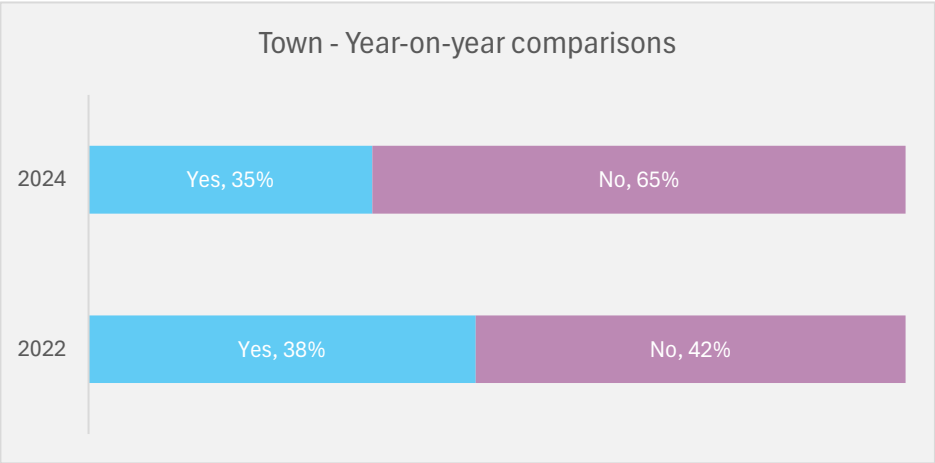
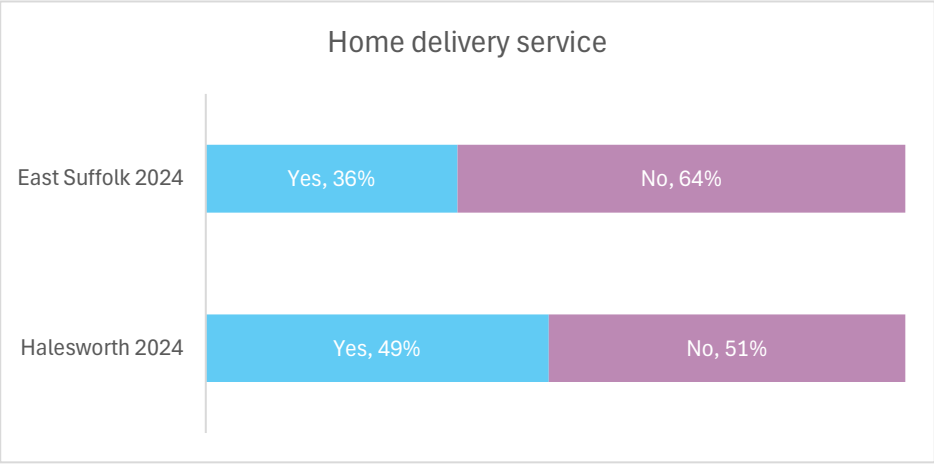
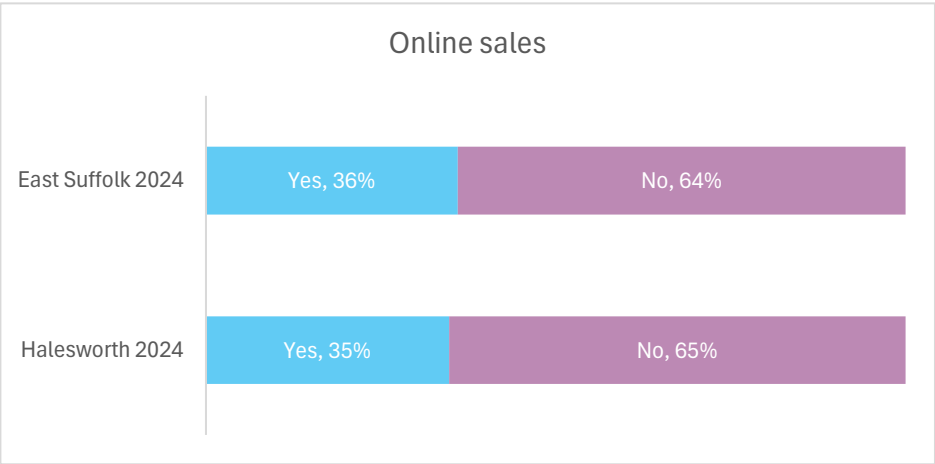
Town centre businesses – Business profile

What would you say is the average customer dwell time for a standard visit to your premises?



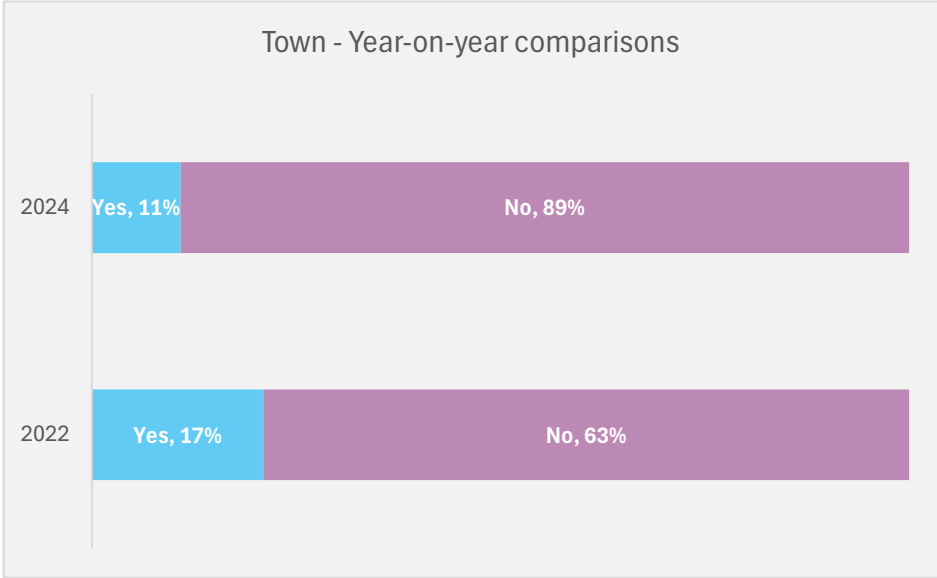
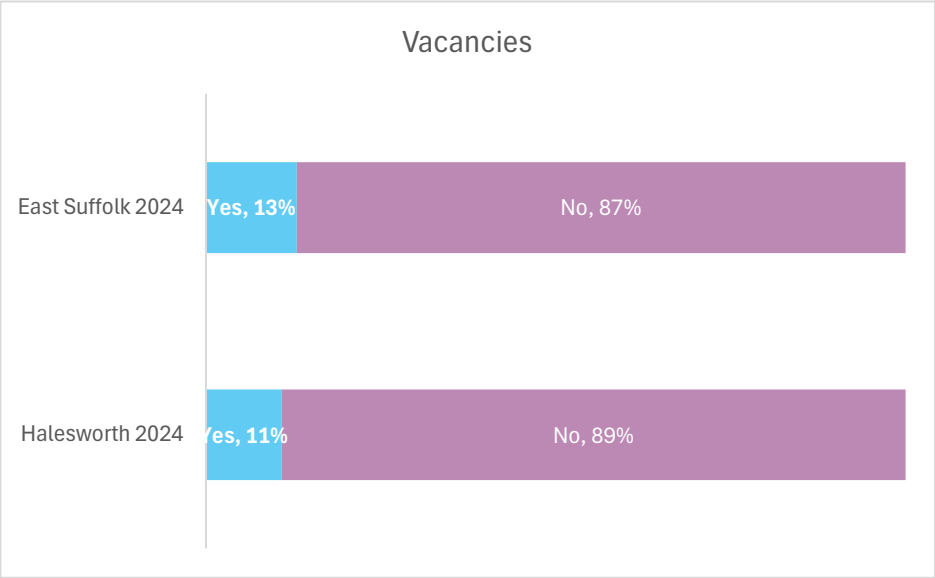
Town centre businesses – Business profile

Do you offer any of the following?



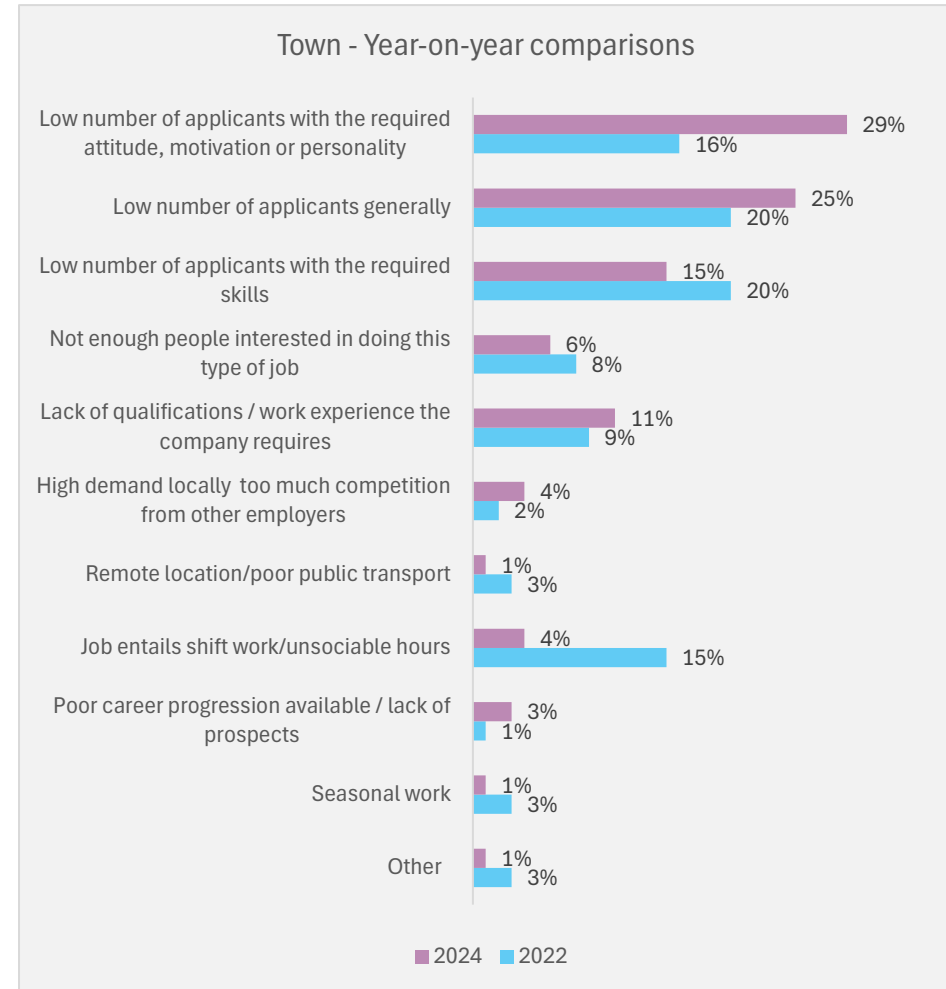
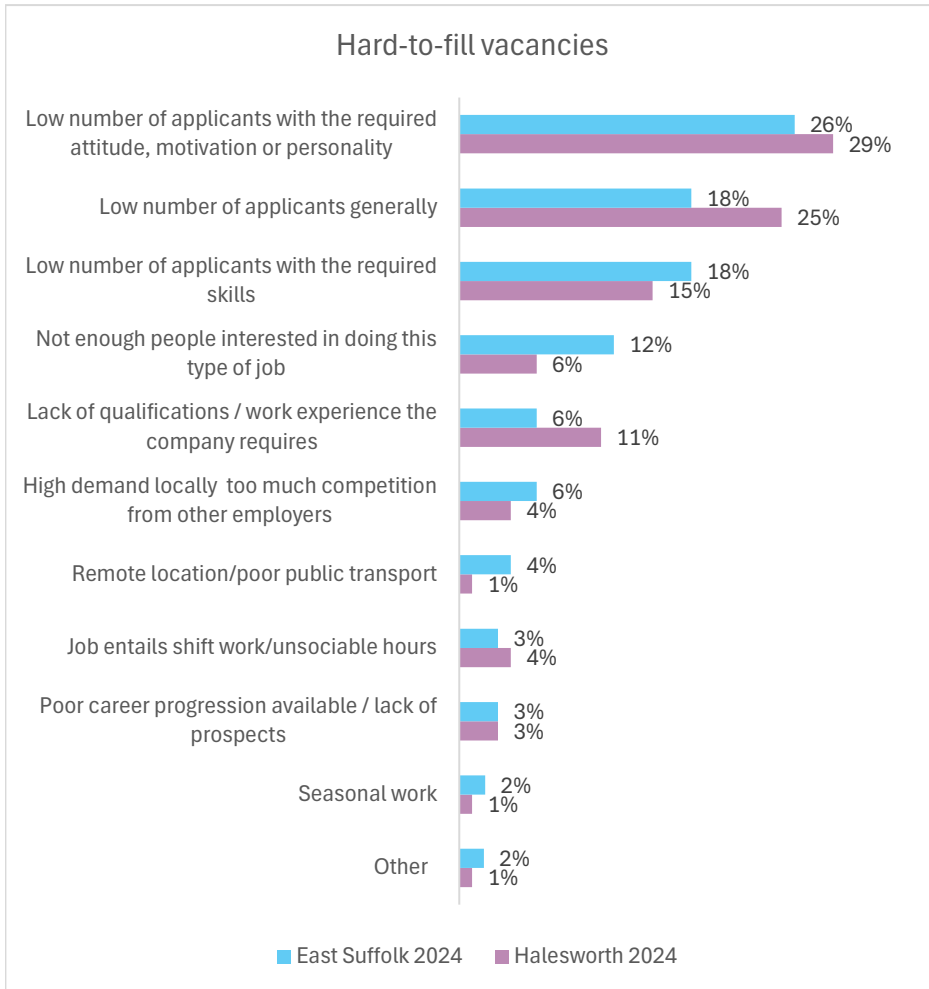
Town centre businesses – Vacancies

Do you currently have any vacancies?



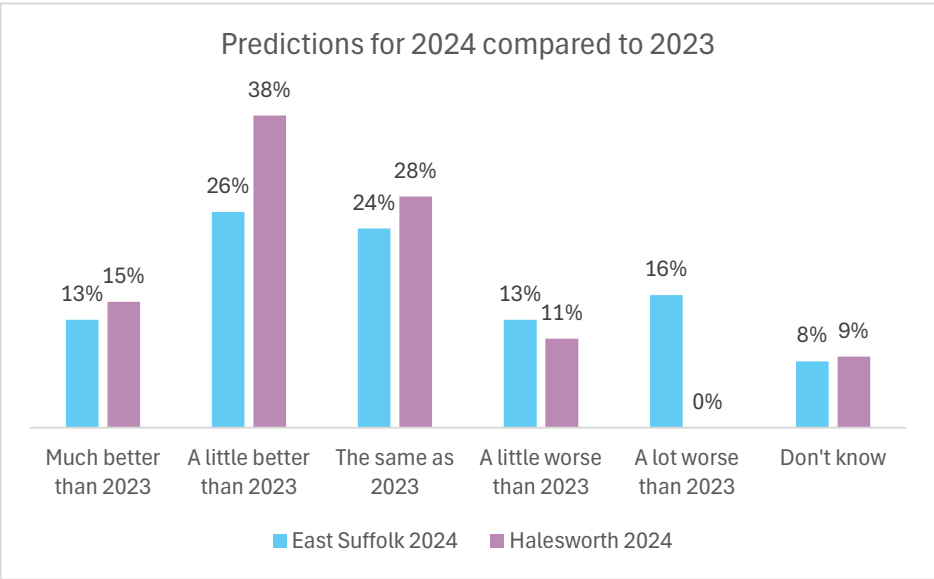
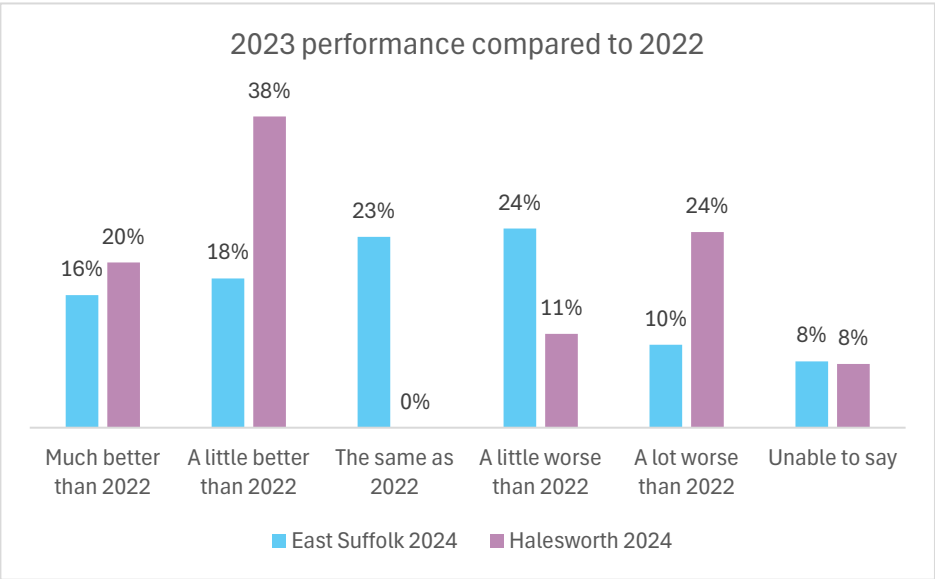
## Town centre businesses – Vacancies

In your view, what are the reasons that make your vacancies hard-to-fill?



Town centre businesses – Business performance

Thinking now about 2023, how was your business performance? Thinking now about 2024, do you expect your business performance to be?



## Town centre businesses – Satisfaction scores

| Aspects of Town Centre                | East Suffolk 2024 | Halesworth 2024 | Town v District |
|---------------------------------------|-------------------|-----------------|-----------------|
| <b>LOCAL BUSINESS</b>                 |                   |                 |                 |
| Cafes, pubs, restaurants              | 4.0               | 4.0             | 0.0             |
| Geographical location                 | 3.9               | 3.8             | -0.1            |
| Mix of retail offer                   | 3.4               | 3.9             | 0.5             |
| Prosperity of the town                | 3.4               | 3.3             | 0.0             |
| Physical appearance                   | 3.3               | 2.9             | -0.4            |
| The Market(s)                         | 3.0               | 2.3             | -0.7            |
| Labour pool                           | 2.9               | 2.3             | -0.6            |
| Availability of premises              | 2.9               | 4.1             | 1.2             |
| Rental values/ rates                  | 2.6               | 2.9             | 0.3             |
| <b>CUSTOMERS TO YOUR BUSINESS</b>     |                   |                 |                 |
| Seasonal economy                      | 3.3               | 3.4             | 0.1             |
| Customers - Volume of visitors        | 3.1               | 3.1             | 0.0             |
| Customers - Volume of town residents  | 2.8               | 2.6             | -0.2            |
| Footfall                              | 2.7               | 2.8             | 0.1             |
| Affordable housing                    | 2.2               | 1.9             | -0.3            |
| <b>EASE OF ACCESS (TOWN)</b>          |                   |                 |                 |
| Road / Pedestrian Signs               | 2.9               | 2.7             | -0.2            |
| Traffic volumes                       | 2.9               | 3.2             | 0.2             |
| Car Parking provision                 | 2.3               | 3.9             | 1.6             |
| Public transport availability         | 2.4               | 1.6             | -0.8            |
| Cycle lanes / bike racks              | 2.1               | 1.8             | -0.3            |
| <b>PROMOTION (TOWN)</b>               |                   |                 |                 |
| Events/ activities                    | 3.1               | 3.1             | 0.0             |
| Free public WiFi                      | 2.9               | 3.5             | 0.6             |
| Local partnerships/ organisations     | 2.9               | 3.5             | 0.6             |
| Local marketing & promotion platforms | 2.8               | 3.5             | 0.7             |

Please rate your satisfaction level based on the following aspects of the town using a scale of 1 to 5 (1 = Not at all satisfied, 5 = Very satisfied).

## Town centre businesses – Satisfaction scores - Year-on-year comparisons

| Aspects of Town Centre                | 2024 | 2022 | 2024 v 2022 |
|---------------------------------------|------|------|-------------|
| <b>LOCAL BUSINESS</b>                 |      |      |             |
| Cafes, pubs, restaurants              | 4.0  | 4.4  | -0.4        |
| Geographical location                 | 3.8  | 3.9  | -0.1        |
| Mix of retail offer                   | 3.9  | 4.0  | -0.1        |
| Prosperity of the town                | 3.3  | 3.4  | -0.1        |
| Physical appearance                   | 2.9  | 3.9  | -1.0        |
| The Market(s)                         | 2.3  | 3.1  | -0.8        |
| Labour pool                           | 2.3  | 3.1  | -0.8        |
| Availability of premises              | 4.1  | 3.1  | 1.0         |
| Rental values/ rates                  | 2.9  | 2.9  | 0.0         |
| <b>CUSTOMERS TO YOUR BUSINESS</b>     |      |      |             |
| Seasonal economy                      | 3.4  | 3.5  | -0.1        |
| Customers - Volume of visitors        | 3.1  | 3.9  | -0.8        |
| Customers - Volume of town residents  | 2.6  | 3.4  | -0.8        |
| Footfall                              | 2.8  | 2.9  | -0.1        |
| Affordable housing                    | 1.9  | 2.7  | -0.8        |
| <b>EASE OF ACCESS (TOWN)</b>          |      |      |             |
| Road / Pedestrian Signs               | 2.7  | 2.7  | 0.0         |
| Traffic volumes                       | 3.2  | 3.3  | -0.1        |
| Car Parking provision                 | 3.9  | 3.0  | 0.9         |
| Public transport availability         | 1.6  | 2.0  | -0.4        |
| Cycle lanes / bike racks              | 1.8  | N/A  | N/A         |
| <b>PROMOTION (TOWN)</b>               |      |      |             |
| Events/ activities                    | 3.1  | 3.3  | -0.2        |
| Free public WiFi                      | 3.5  | N/A  | N/A         |
| Local partnerships/ organisations     | 3.5  | 3.3  | 0.2         |
| Local marketing & promotion platforms | 3.5  | 3.3  | 0.2         |

Please rate your satisfaction level based on the following aspects of the town using a scale of 1 to 5 (1 = Not at all satisfied, 5 = Very satisfied).

## Town centre businesses – Satisfaction scores

**What priority does your business currently give to?** (1= Very unimportant, 5 = Very important)

| Aspects of Town Centre                                                    | East Suffolk 2024 | Halesworth 2024 | Town v District |
|---------------------------------------------------------------------------|-------------------|-----------------|-----------------|
| Creation and management of business web site                              | 3.3               | 4.3             | 1.0             |
| Regular use of social media to promote business and engage with customers | 3.9               | 4.3             | 0.4             |
| Generation and provision of on-line sales                                 | 2.5               | 3.2             | 0.6             |
| Collection and analysis of customer data to help target marketing         | 2.9               | 3.5             | 0.6             |

## Year-on-year comparison : Halesworth 2024

| Aspects of Town Centre                                                    | 2024 | 2022 | 2024 v 2022 |
|---------------------------------------------------------------------------|------|------|-------------|
| Creation and management of business web site                              | 4.3  | 3.4  | 0.9         |
| Regular use of social media to promote business and engage with customers | 4.3  | 3.5  | 0.8         |
| Generation and provision of on-line sales                                 | 3.2  | 2.3  | 0.9         |
| Collection and analysis of customer data to help target marketing         | 3.5  | 2.3  | 1.2         |

## Town centre businesses – Satisfaction scores

**How do you rate the competition to your business?** (1 = Always a problem for me, 5 = Never a problem for me)

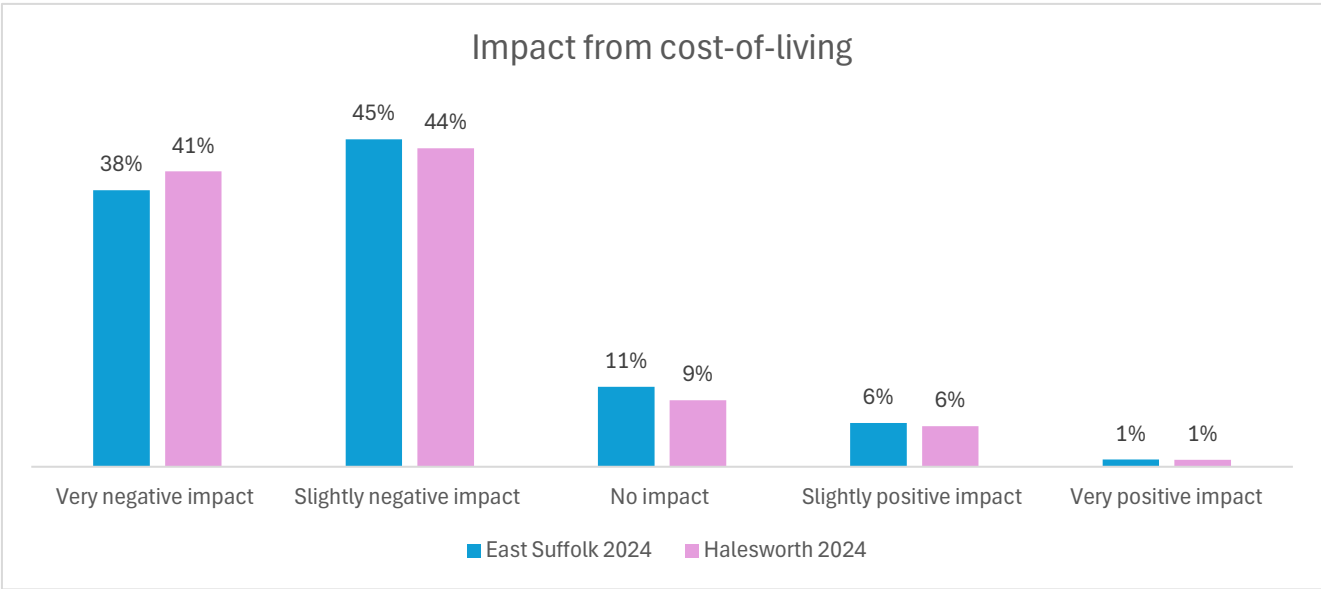
| Aspects of Town Centre                | East Suffolk 2024 | Halesworth 2024 | Town v District |
|---------------------------------------|-------------------|-----------------|-----------------|
| Local business competition            | 3.2               | 3.2             | 0.0             |
| Competition from other localities     | 3.2               | 3.1             | -0.1            |
| Competition from out-of-town shopping | 3.1               | 2.8             | -0.3            |
| Competition from internet             | 3.0               | 2.8             | -0.2            |

## Year-on-year comparison : Halesworth 2024

| Aspects of Town Centre                | 2024 | 2022 | 2024 v 2022 |
|---------------------------------------|------|------|-------------|
| Local business competition            | 3.2  | 3.8  | -0.6        |
| Competition from other localities     | 3.1  | 3.7  | -0.6        |
| Competition from out-of-town shopping | 2.8  | 3.4  | -0.6        |
| Competition from internet             | 2.8  | 3.4  | -0.6        |

Town centre businesses – Cost of living

How much of an impact, if at all, has the rising cost of living had on you (e.g. wellbeing, confidence, etc)?



## Town centre businesses – Business support

**What type of business support and advice have you accessed in the past? And what business support and advice would you benefit from and be most interested to receive in the future?**

|                                                                       | Accessed in the past |                 | Would use in the future |                 |
|-----------------------------------------------------------------------|----------------------|-----------------|-------------------------|-----------------|
|                                                                       | East Suffolk 2024    | Halesworth 2024 | East Suffolk 2024       | Halesworth 2024 |
| Advertising, marketing and communications                             | 64%                  | 61%             | 62%                     | 60%             |
| Digital development (e.g. website and establishing or increasing your | 55%                  | 54%             | 70%                     | 69%             |
| Business essentials (e.g. finance and business planning, HR,          | 73%                  | 69%             | 43%                     | 41%             |
| Accessing new markets e.g. expanding customer base, suppliers,        | 44%                  | 43%             | 74%                     | 72%             |
| Networking opportunities                                              | 79%                  | 78%             | 54%                     | 53%             |
| Making physical changes to your business premises and equipment       | 63%                  | 63%             | 63%                     | 63%             |
| Business model improvement (e.g. ebusiness model, cost & sales        | 57%                  | 56%             | 67%                     | 66%             |
| Making energy efficiency improvements to your business                | 45%                  | 43%             | 62%                     | 60%             |
| Expanding staff numbers including apprentices                         | 40%                  | 38%             | 72%                     | 69%             |
| Visual merchandising e.g. shop window displays, online presentation   | 65%                  | 63%             | 61%                     | 60%             |
| Grants and Funding Advice                                             | 41%                  | 39%             | 82%                     | 79%             |

## Town centre businesses – Business practices

**Sustainable business practices does your business support any of the following business practices? Do you offer any of the following services to your customers?**

|                | Business practices supported |                 | Services offered to customers |                 |
|----------------|------------------------------|-----------------|-------------------------------|-----------------|
|                | East Suffolk 2024            | Halesworth 2024 | East Suffolk 2024             | Halesworth 2024 |
| Recycling      | 77%                          | 82%             | 46%                           | 49%             |
| Reusing        | 51%                          | 54%             | 28%                           | 30%             |
| Repairing      | 41%                          | 44%             | 21%                           | 22%             |
| Refurbishing   | 42%                          | 45%             | 13%                           | 14%             |
| Not applicable | 19%                          | 20%             | 53%                           | 56%             |
| Other          | 3%                           | 3%              | 2%                            | 3%              |



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