Appendix 3: Full Town Centre Healthcheck

Rugby Town Centre

Description	Rugby town centre is the primary retail and leisure destination within the Borough of Rugby and serves as a key sub-regional centre in Warwickshire. The Goad area encompasses 395 retail, leisure and service units, providing for approximately 68,000 sq.m of commercial floorspace. The town centre has faced significant challenges in recent years, with its comparison retail offer being particularly impacted by competition from nearby out-of-centre retail parks, especially Elliott's Field, and broader national trends such as the cost-of-living crisis. As a result, several prominent retailers have relocated, leading to a decline in the proportion of non-food retailing within the town centre. Despite these challenges, Rugby town centre continues to serve the day-to-day needs of its residents. Its Asda superstore plays a key anchor role and provides for a wide range of comparison as well as convenience goods. Rugby Market also contributes to the diversity in the retail offer and draws supporting footfall. Moreover, Rugby benefits from a reasonably good daytime and evening leisure offer, together with strong representation in the retail services and financial & business services sectors, again reflecting its role as an important service centre for its local catchment and the wider sub-region. The Rugby Regeneration Strategy adopted in November 2022 outlines six key projects that seek to transform the town centre, including the redevelopment of the Rugby Shopping Centre to respond to some of the issues outlined above. The Strategy also provides for enhanced linkages and areas of public realm in the town centre, together with the diversification to the retail and leisure offer and introduction of new residential uses. Moreover, the town centre is set to benefit from the significant residential development allocated in Policy DS3 of the adopted Rugby Borough Council Local Plan. This policy allocates around 13,300 homes on four sites at the Rugby Urban Edge. Construction has commenced in respect of all four of these sites and much of the identified housing growth is anticipated to occur over the plan period, with the allocations expected to be carried forward in the emerging Local Plan. The new residents will bring additional trips, activity, footfall and expenditure to Rugby which will help to support and enhance its vitality and viability.

Figure 1: High Street: A mix of uses with some outdoor seating.

Figure 2: Sheep Street: Utilised cycle parking, street trees and the use of curtilage for leisure.

Figure 3: Bank Street: A mix of uses with attractive frontages and on-street parking.

Figure 4: Swan Centre: Active frontages leading to the Rugby Central Shopping Centre.

Table 1 Rugby Town Centre Floorspace Composition

GOAD Category	Floorspace at 2007 (%)	Floorspace at 2014 (%)	Floorspace at 2024 (sq.m)	Floorspace at 2024 (%)	Floorspace UK Average at March 2024 (%)
Comparison	40.3	36.2	14,880	22.0	29.7
Convenience	6.1	14.1	10,050	14.8	15.5
Financial & Business	14.7	12.1	6,920	10.2	6.3
Leisure	24.6	20.0	16,070	23.7	26.6
Retail Service	7.6	8.1	6,650	9.8	7.3
Vacant	14.7	9.1	13,110	19.4	14.0
Other	0.0	0.3	0	0.0	0.0
TOTAL	**100.0**	**100.0**	**67,680**	**100.0**	**100.0**

Source: Composition of town centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of June 2024; 2007 and 2014 data derived from Rugby Retail and Main Town Centre Uses Study 2015; UK Average from Experian Goad Report March 2024.

Table 2 Rugby Town Centre Unit Composition

GOAD Category	Number of Units at 2007	Units at 2007 (%)	Number of Units at 2014	Units at 2014 (%)	Number of Units at 2024	Units at 2024 (%)	Units UK Average at March 2024 (%)
Comparison	150	38.2	126	32.1	89	22.4	26.8
Convenience	19	4.8	29	7.4	36	9.1	9.3
Financial & Business	59	15.0	56	14.2	38	9.6	8.7
Leisure	75	19.1	77	19.6	98	24.7	25.4
Retail Service	43	10.9	59	15.0	81	20.4	15.8
Vacant	35	8.9	45	11.5	55	13.9	14.0
Other	0	0.0	1	0.3	0	0.0	0.0
TOTAL	**381**	**100.0**	**393**	**100.0**	**397**	**100.0**	**100.0**

Source: Composition of town centre based on boundary as defined by Experian Goad and derived from Nexus Planning Survey of June 2024; 2007 and 2014 data derived from Rugby Retail and Main Town Centre Uses Study 2015; UK Average from Experian Goad Report March 2024.

Uses

The Goad area of Rugby town centre encompasses 395 retail, leisure and service units, providing for approximately 68,000 sq.m of commercial floorspace.

In recent years, the comparison offer in Rugby has been impacted by competition from nearby out-of-centre retail parks – particularly Elliott's Field, which lies approximately 2km to the north of the town centre – as well as neighbouring centres such as Coventry city centre. A number of high-profile comparison operators have left Rugby town centre since the preparation of the Council's previous Retail Study (2015) in order to relocate to Elliott's Field, including Next, M&S and Dunelm.

The town centre has also been vulnerable to the well-documented challenges faced by the wider UK retail market, including the impacts of Brexit, the Covid-19 pandemic, and rises in the cost of living.

As a result, there has been a marked decline since 2007 in the proportions of both floorspace and units in the centre dedicated to non-food retailing. In 2024, 22.0% of floorspace and 22.4% of units were used by comparison shops; significantly below the corresponding national averages of 29.7% and 26.8% respectively and representing almost half of the equivalent figures in 2007.

Nonetheless, the town centre continues to play an important role in meeting to the day-to-day needs of its substantial residential catchment, and this is reflected in the scales and formats of those non-food retailers that are present.

Approximately 37% of the comparison shops in the town centre are national multiples, concentrated in the Rugby Central Shopping Centre. Provision is somewhat skewed towards the lower or value end of the market but covers a good range of everyday needs, with stores selling clothes (New Look, Pep & Co.), household goods (Poundland, Home Bargains), chemist and beauty products (Bodycare, Superdrug), and several charity shops. Moreover, the Asda supermarket in the west of the centre sells a broad range of non-food products.

The remaining 63% of comparison operators in the centre are independent, and Rugby enjoys representation from a good variety of retailers including art dealers, booksellers, clothes stores, electronics shops, gift shops, jewellers and mobile phone shops.

Overall, while it will be important to maintain the core day-to-day comparison goods offer in the town centre, we would anticipate that Elliott's Field and other out-of-centre retail provision will continue to represent the dominant local destinations for non-food shopping. In this context, the planned investments detailed in the 'Opportunity Sites' section of this healthcheck will be key to diversifying the town centre offer in order to ensure Rugby's long-term resilience.

In contrast to the observed trends in comparison shopping, the proportions of floorspace and units in convenience retail use have increased significantly in Rugby since 2007. Convenience representation in the town centre is now only slightly below the national averages in respect of both floorspace and units.

The Asda superstore alone accounts for a large proportion of the centre's food retail floorspace (44.2%) and serves as an important anchor drawing trade from a wide catchment. Following the closure of the Iceland store in Rugby Central in February 2024, the only other national multiple supermarket in the centre is the Co-op on Clifton Road, which measures 750 sq.m.

The remaining convenience provision is largely independent and includes bakers and confectioners, CTN and convenience stores, a health foods store and independent supermarkets. These operators are generally small in scale and distributed fairly evenly throughout the town centre, with a small concentration at Clifton Road in the east.

Rugby Market, which is held every Friday and Saturday at Market Place, makes an important contribution to diversity in both the comparison and convenience retail categories. The traditional market hosts a number of independent and local traders selling a broad range of goods including fruit and vegetables, household essentials, homemade crafts, clothing, and flowers and plants.

	Rugby benefits from a strong leisure offer, particularly in the food and drink sector. Both the number of operators and the proportion of floorspace in leisure use have increased since 2014, with the centre's level of provision now sitting at just below the relevant UK averages. The expansion of the town centre's offer in recent years may in part reflect a relative lack of leisure provision at Elliott's Field, in particular, compared to similarly sized out-of-centre retail parks elsewhere in the UK. There is some representation in Rugby town centre from national multiples, which account for approximately 17% of its commercial units. These operators include Betfred, Caffe Nero, Domino's, McDonald's and Wetherspoons. However, the vast majority (83%) of the town centre's leisure traders are independents, with the offer predominantly composed of food & beverage outlets. These are dispersed throughout the centre and occupy a variety of unit sizes and formats. Other leisure provision in the town centre includes Rugby Theatre, amusement centres, bookmakers and gyms. The proportions of retail service units and floorspace in Rugby have been increasing since 2007 and exceed the relevant national averages. Around two thirds of these operators are health and beauty outlets, primarily independents. These are complemented by a range of other service units which are able to meet residents' day-to-day needs, including opticians, a petrol filling station, a post office, and travel agents. Financial & business service representation has declined since 2007, although we consider that this finding largely reflects national trends such as the move to online banking. Provision in Rugby town centre continues to surpass UK averages in terms of floorspace and units, with a very good range of operators that highlights Rugby's role as an important service centre for its local catchment and the wider sub-region. The offer includes accountants, banks and building societies, estate agents, insurance brokers, pawnbrokers, and solicitors.
Daytime/Evening Economy	Rugby's daytime economy is underpinned by its strong day-to-day retail and service offer which meets the needs of its local residents. The opening times of the town centre's shops and service operators are generally limited to normal business hours, although there are some exceptions. Notably, Asda closes at 10pm except on Sundays. The town centre also benefits from a well-developed evening economy, with concentrations of pubs, restaurants and takeaways

	located around Sheep Street, High Street, Regent Street and parts of Church Street. These uses ensure that much of the centre draws footfall and activity until late into the night. The forthcoming redevelopment of the Rugby Shopping Centre, which is explained in detail under the 'Opportunity Sites' heading below, will include provision for additional food and drink floorspace which has the potential to further support to the town's evening economy, and to provide a leisure 'anchor' which it currently lacks.
Vacancies	Table 2 above indicates that the floorspace vacancy rate in Rugby town centre has more than doubled since 2014, with the current rate of 19.4% being well above the national average of 14.0%. However, it is important to note that 55.2% of the vacant floorspace in the town centre (i.e. 7,240 sq.m out of a total of 13,110 sq.m) comprises unoccupied units within the Rugby Shopping Centre. Indeed, the Shopping Centre includes the four largest vacant units in the town centre and seven of the top ten largest vacant units. As explained in the next section, the Shopping Centre is due to be partially demolished and redeveloped, which will significantly reduce the overall quantum of unoccupied commercial floorspace within Rugby. Given this context, we consider that the unit vacancy rate is a more reliable indicator of the town centre's health. This has also risen since 2014, from 11.5% to 13.9%, but the more moderate rise is reflective of rising vacancy rates across the UK over the same period. In 2014, the 11.5% Rugby figure was on a par with the national average at that time of 11.4%. This trend has persisted and in 2024, the Rugby unit vacancy rate of 13.9% is broadly in line with the UK mean of 14.0%. The Council's own most recent Authority Monitoring Report of 2022-2023, which is based on a slightly different methodology, records a similar unit vacancy rate in Rugby of 13.6%. Notably, if the empty units in the Rugby Central Shopping Centre are excluded from the calculations set out in Tables 1 and 2 above, then Rugby's floorspace vacancy rate drops to 9.7% compared to a national average of 14.0% and its unit vacancy rate drops to 10.2% compared to a national average of 14.0%. These findings highlight the impact that the changes in the local and national comparison retail markets outlined above (including out-of-centre competitors like Elliott's Field and national trends such as the pandemic and rises in the cost-of-living rises) have had on the composition of the town centre. Indeed, the Swan Centre is

	another vacancy 'hotspot', being an indoor shopping centre which has previously been similarly reliant on non-food retail operators. Other vacancies are spread across the town centre, with a small concentration on High Street. These are generally well-maintained and there are few clusters, which limits their adverse impact on the look and feel of the centre.
Opportunity Sites	The Council's Rugby Regeneration Strategy, adopted in November 2022, is sets out a strategic vision and framework for investment and change in Rugby town centre to 2035.[1] The Regeneration Strategy directly informs funding and investment decision-making and is a material consideration for planning application. The document proposes a number of significant physical and non-physical interventions in the town centre. Six Strategic Projects are identified as having catalytic potential. Full details are provided in the Regeneration Strategy itself, but we briefly summarise the six projects below: 1. **Rugby Hub**, which would involve a reduction of the Council office floorspace at the Town Hall and the creation of a 'Hub' for multiple public services such as Council, NHS and Job Centre functions. 2. **Rugby Market**, which would see a relocation of the existing bi-weekly market to a new permanent home and the creation of a new market concept to include food and drink uses. 3. **Rounds Garden**, an ongoing regeneration project that includes the demolition and redevelopment of the existing Council-owned housing estate to the north-west of the town centre, to provide for an improved and more diverse housing offer with better linkages to the town centre. 4. **Rugby Central**, Phase 1 of which has been granted permission under reference R22/0657. This permission allows for the partial demolition of the Shopping Centre and its redevelopment for a mix of residential uses and a reduced quantum of commercial floorspace which will include provision for food and drink uses. The Regeneration Strategy envisages a Phase 2 delivery programme would include the long-term redevelopment of the Rugby Central car park and the now vacant Cemex site to improve both frontage to and connectivity across Corporation Street.

[1] Rugby Regeneration Strategy 2022. Available here: https://www.rugby.gov.uk/documents/20124/6589483/20143_R_Regeneration_Strategy_FINAL_optimised.pdf/8aae9f9c-5738-3983-5bb0-811fcbfc1eae?t=1702375946440 [accessed 23 August 2024].

5. **Evreux Way and Corporation Street**, which will improve connections between the town centre's core retail area and the wider neighbourhoods including Rounds Gardens.

6. **Church Street and North Street**, which seeks the creation of the creation of a high-quality public realm scheme encouraging sustainable and active travel around Church Street and North Street, which form the backbone of the town centre.

The redevelopment of Rugby Central Shopping Centre, in particular, is an important opportunity that seeks to respond to a number of the challenges facing the town centre identified in the preceding sections of this healthcheck. The permitted development will result in a reduction and rationalisation of the existing traditional high street retail floorspace within the Shopping Centre, much of which is currently vacant. The resulting, new and reconfigured units will be occupied by a range of Class E uses including retail, cafés and restaurants, and also *sui generis* uses such as bars and pubs. The permission also provides for enhanced frontages, including a new entrance and gateway along North Street.

The vision is to create a new 'image' for Rugby Central that is attractive, vibrant and drives footfall during the day and night-time. Residents of the new apartments will provide further support to the vitality and viability of the town centre through additional footfall, activity and expenditure, helping to maintain and improve Rugby's role as a retail and service centre which fully caters for the day-to-day needs of its local catchment.

The potential Phase 2 of the Rugby Central project envisages the creation of more prominent and active frontages can be created on gateway sites including the site of the former Cemex House. Cemex House is a vacant office block located in the northwestern part of the Primary Shopping Area (as currently defined).

Aldi Stores Limited has submitted a planning application proposing the demolition of the existing office building and the erection of a new Class E food retail store with associated new access, car parking, servicing and landscaping. This application remains undetermined at time of writing (August 2024). Regardless of the outcome of the Aldi proposal, the vacant brownfield Cemex House site is currently underutilised and represents a clear opportunity for redevelopment to strengthen the overall vitality of the town centre.

In addition to these town-centre-specific opportunities, the Regeneration Strategy recognises the significant ongoing and planned residential development taking place at the Rugby Urban

	edge. Policy DS3 of the adopted Rugby Borough Council Local Plan allocates approximately 13,300 houses across four sites, supported by employment floorspace and other uses. The town centre lies at the heart of this planned large-scale development and is set to benefit from the activity associated with the new homes and jobs.
Pedestrian Flows	We observed a reasonably high level of pedestrian activity throughout the town centre, particularly along the central spine route which is Church Street and North Street. The survey was conducted on a Friday which coincided with market day hosted on Market Place, which may have attracted more people into the area. The stalls were witnessed to have customers and interest from passersby. There was a strong flow of pedestrians between Market Place (the centre of the town centre in terms of geography and concentration of units) and the Asda Car Park and Old Market Place/Railway Terrace Car Park. Areas of lower footfall were arterial to the central route and tended to have evening economy uses and therefore would not generate daytime activity.
Accessibility	Rugby is easily accessible by car, with a number of sizeable car parks within the city centre including: Old Market Place, Railway Terrace, Gas Street and ASDA. There are also opportunities for on-street parking along Regent Street and Albert Street and beyond. Parking, with exception to the ASDA store car park, is located towards the east of the centre, but within a 15-minute walking radius. Roads to the north of Church Street typically provided on-road parking, restricted up to 2 hours. Rugby Railway Station is located around 1km from the town centre (marking the Clock Tower as the central point). The 20-minute walk will limit town centre visitors arriving by train. With regard to accessibility around the town centre, there are a number of one-way routes and now pedestrian roads. Barring delivery access, areas around Sheep Street, High Street and Market Place are fully pedestrianised. Pedestrians are supported by the built environment within the town centre. The general standard of accessibility for visitors on foot is high. The generally flat topography dropped curbs and lack of clutter mean that the centre presents few barriers for those with mobility impairments.

	Pelican crossings aid users along the busy Church Street, North Street and Corporation Street. A pelican crossing is located along dualled carriage way of Corporation Street provided access between the Health Cnetre and Asda superstore. This was notably the most pedestrian unfriendly area within the town centre. Helpfully, benches were located along most streets and grouped in key locations such as Market Place, The Pleasance and the Rupert Brooke Statue. Bus stops were conveniently located along Church Street, North Street and Corporation Street. Most stops had a shelter and a bench and were noted to busy. There is a good level of cycle parking and infrastructure located throughout the town centre to accommodate cyclists. However, the cycle parking did not appear to be occupied.
Perception of Safety	At the time of our visit, Rugby felt largely safe and secure. A strong level of pedestrian activity was observed throughout the town centre, reducing any perceived threat of crime. Street lighting was noted throughout the town centre and, as noted above, evening uses are scattered throughout the centre, which will increase the perception of safety and activity for evening users. To the north of Church Street, the on-street parking allows for the proximity of vehicles to pedestrians, which did detract slightly from the overall feeling of safety. Overall, however, the centre feels safe, secure and well-monitored throughout and is largely free of evidence of anti-social behaviour such as graffiti or vandalism.
Environmental Quality	Sitting predominately within a Conservation Area, the town centre is predominately brick and gave an appearance of high environmental quality. Shopfronts are generally well-maintained however vacant uses and the number of closed roller shutters during daytime opening hours did detract somewhat from the overall appearance. The addition of street furniture such as lighting, benches, planters and flags in Sheep Street, High Street, Market Place and Regent Street created an attractive and welcoming area. To the eastern boundary of the town centre, the quality of the built environment did decline, including Albert Street, Church Street and Railway Terrace. Some units shown signs of disrepair and low-

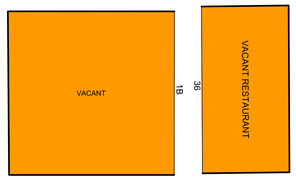
	quality signage, whilst other areas suffered from a mix of uses which diluted the attractiveness of the area. More modern areas including the Rugby Central Shopping Centre and the Swan Centre were of overall lower environmental quality. This is mainly a result of the high percentage of vacant units. It is recommended that vacant units are dressed improve the quality of the shopfront. These areas also lack green infrastructure. It was noted that planter fixtures within The Swan Centre remained empty of planters. Planting would have a positive impact on the environmental quality of these areas. Nonetheless, overall, we consider that the town centre provides for a well-maintained and attractive shopping and leisure environment.
Conclusions	Rugby town centre provides for a strong day-to-day retail and service offer which meets the needs of its local residents and serves as a key sub-regional centre in Warwickshire. In recent years, the comparison offer in Rugby has been impacted by competition from nearby out-of-centre shopping parks, particularly Elliott's Field, together with broader national trends which have led to a general decline in representation from non-food retailers within town centres. Nonetheless, the town centre's comparison shops continue to provide for a good range of everyday needs, although provision is somewhat skewed towards the lower or value end of the market. The convenience retail offer is anchored by the Asda superstore, supported by Rugby Market and a diverse mix of independent retailers. The town centre also benefits from a well-developed leisure sector, particularly in terms of food and drink uses, with a strong presence of independent operators. Rugby's pubs, restaurants, and takeaways, sustain footfall and activity until well into the evenings. Furthermore, the town centre's accessibility, both by car and public transport, coupled with its pedestrian-friendly environment, ensure that it remains a convenient and attractive destination for residents and visitors alike. While the town centre's floorspace vacancy rate is above average, this is mainly a reflection of the large amount of unoccupied floorspace within Rugby Central (and, to a lesser extent, the Swan Centre) due to the challenges facing the comparison retail sector in particular. Rugby's unit vacancy rate remains on par with the national average, with these units generally being well-maintained and spread throughout the centre, limiting their adverse impact on the look and feel of the town centre.

Efforts to further strengthen Rugby's vitality and viability are well underway, with the Rugby Regeneration Strategy 2022, outlining a comprehensive plan to address the challenges faced by the town centre. Key projects within the strategy, including the permitted redevelopment of the Rugby Central Shopping Centre, aim to diversify the retail and leisure offer and introduce new residential uses, generating additional footfall and expenditure. More broadly, the significant ongoing and allocated residential development at the Rugby Urban Edge promises to bring new homes and jobs which will further benefit the town centre, which lies at the heart of this area.

Overall, Rugby is considered to be reasonably vital and viable, with the projects outlined in the Regeneration Strategy having the potential to respond to the challenges facing the town centre and ensure it remains resilient over the long term.

Rugby Town Centre as at 14th June 2024

First Floor, Rugby Central Shopping Centre



Legend
- Comparison
- Convenience
- Financial & Business Service
- Leisure Services
- Retail Services
- Vacant
- Miscellaneous

North

50 metres

Experian Goad Plan Created: 25/06/2024
Created By: Nexus Planning Ltd

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