ADDENDUM TO SUFFOLK COASTAL RETAIL STUDY

SEPTEMBER 2009

Introduction

This addendum to the Council's 2008 Retail Assessment has been prepared by CB Richard Ellis in response to:

- Proposed changes in the provision of housing over the plan period; and
- The current economic slowdown and its implications on growth in future expenditure.

This report updates in part, and should be read in conjunction with, CB Richard Ellis' 2008 Retail Assessment.

Population and Revised Housing Numbers

Population estimates and forecasts for each survey zone were prepared from MapInfo Any Site (2009). Population figures overall for the catchment area have increased since our last assessment, based upon MapInfo's population projections for the study area.

As part of our assessment we have also taken into consideration the level and distribution of housing supply that is expected to come forward during the plan period as identified by Suffolk Coastal District Council. The total number of proposed housing has remained unchanged from our previous assessment, with 7,170 new dwellings creating an additional population of 15,420 (calculated, as per our previous assessment, by applying an occupancy rate of 2 people per dwelling – as taken from Suffolk Coastal District Council's Private Sector Hosing Renewal Strategy, August 2007). However assumptions as to the phasing of development have altered from our previous assessment based upon discussions with Suffolk Coastal District Council in September 2009.

The level of housing proposed includes: outstanding planning permissions; urban potential; outstanding housing allocations from previous plan; new allocations and small windfall housing estimates from Suffolk Coastal District Council. Our approach to the distribution of housing numbers is summarised below:

- Outstanding planning permissions; urban potential; outstanding housing allocations from previous plan and small windfall housing estimates have all been phased to come forward from 2008-2013.
- The addition of new allocations in the borough totalling 4,080 new dwellings has been phased across the whole plan period to come forward from 2008-2025.
- Housing proposed to come forward in 'Market Towns' and 'Key & Local Service Centres' has been split between Zones 1, 2, 3, 4, 6, 7 and 9 where the towns of Felixstowe, the Ipswich area, Woodbridge, Saxmundham, Leiston, Aldeburgh and Framlingham are located.
- The estimated housing supply proposed in the Ipswich Policy Area has been split between Zone 2 (with 40% of supply), Zone 3 (40% of supply) and Zone 4 (20% of supply).

- The proposed level of district wide small windfall housing levels is split equally between all 10 zones.

The overall population, based upon the latest MapInfo projections and taking account of housing numbers shows that in 2008 population figures identified in this update are slightly lower than the previous estimates, reflecting changes in phasing of housing numbers. However, population is estimated to increase by 9,828 people at 2025 over the previous study.

Changes in Economic Climate

Since our original Retail Assessment of 2008 the economy has undergone significant changes, particularly in relation to the forecast level of growth which in turn supports new retail floorspace. Verdicts Economic Update (February 2009) states that:

'While the latter half of last year was dominated by gloomy economic news, the impact ton the real economy and on real people was marginal. Unfortunately, the financial crisis of last year has not started to spread into the wider economy and we expect this year to bring decline in growth and increase in unemployment'.

Forecasters have accordingly revised their estimations of growth and publish significantly reduced growth rates which in turn reduced identified capacity for additional floorspace. Our original assessment was based on information provided by MapInfo Brief 07/02 since that time MapInfo have published their Retail Spending Outlook: Revised Version March 2009 which states:

'It has become clear in the past few months that the current recession will be deeper and more prolonged than earlier forecasts predicted, those involved in planning future retailing activity have naturally been concerned about the extent to which this may affect the assumptions that are commonly used to estimate future levels of retail spending…..Falling consumer spending this year and next will be reflected in retail spending figures.'

Furthermore, the most recent MapInfo Brief on Goods-Based Retail Expenditure Estimates and Price Indices – Brief 09/02, published in September 2009 states:

'We anticipate spending on comparative goods to show negative average annual growth of 2.7% during the period 2008-2010 with a return to growth expected over the longer term forecast period. Convenience goods annual expenditure growth is expected to be -0.8% over the period 2008-2010 before subdued growth in convenience goods spending returning over the longer-term forecasts'.

It is therefore wholly appropriate that growth projections applied to this revised Retail Assessment recognise this advice and respond accordingly.

Expenditure Growth Rates

In order to address the issue raised above we have had regard to both 'trend' and 'forecast' in expenditure growth contained in MapInfo's 09/02 brief.

The trend projections are derived solely from past trends and take no account of current economical future expectations. By comparison the forecasts are considered to be consistent with past trends but also reflect changes in other economic variables.

In light of the economic deterioration, there is clearly less growth in available expenditure within the studies catchment area compared to our 2008 retail study, published in advance of retail forecasters recommendations in early 2009.

Previously, a consistent trend growth rate of 1% and 4.9% was applied to convenience and comparison goods, respectively over the plan period. Based upon commentary from such retail forecasters as Experian, MapInfo and Verdict, CB Richard Ellis have updated the quantitative assessment.

To reflect the current economic climate the following growth rates have been applied:

Comparison of 2008 and 2009 Growth Assumptions

Convenience Expenditure Growth

	2005-2006	2006-2007	2007-2008	2008-2019	2019-2025
2008 expenditure growth rate – using annual average expenditure trends (MapInfo Brief 07/02 – Table 1&3)	1%	1%	1%	1%	1%
2009 expenditure growth rate – using same 2008 assumption of annual average expenditure trends (MapInfo Brief 09/02 – Table 1&3)	N/A	3.9%	-0.7%	1.2%	1.2%
2009 expenditure growth rate used in updated assessment – using annual average expenditure forecasts where available and trends (MapInfo Brief 09/02 – Table 1,2&3)	N/A	3.9%	-0.7%	0.6%	1.2%

Source: MapInfo Brief 07/02 and MapInfo Brief 09/02. In considering expenditure growth post 2019 information is only provided in the form of trends. Accordingly post 2019 trend figures are applied.

Summary Table of 2008 and 2009 Growth Assumptions

Comparison Expenditure Growth

GROWTH ASSUMPTIONS (%)	2005-2006	2006-2007	2007-2008	2008-2019	2019-2025
2008 expenditure growth rate – using annual average expenditure trends (MapInfo Brief 07/02 – Table 1&3)	5.5	4.9	4.9	4.9	4.9
2009 expenditure growth rate – using same 2008 assumption of annual average expenditure trends (MapInfo Brief 09/02 – Table 1&3)	N/A	5.1	4.6	4.9	4.9
2009 expenditure growth rate used in updated assessment – using annual average expenditure forecasts where available and trends (MapInfo Brief 09/02 – Table 1,2&3)	N/A	5.1	4.6	2.9	4.9

Source: MapInfo Brief 07/02 and MapInfo Brief 09/02. In considering expenditure growth post 2019 information is only provided in the form of trends. Accordingly post 2019 trend figures are applied.

We believe this to be a balanced, robust approach, incorporating conservative growth in the short term, but allowing for more optimistic growth in the longer term.

Special Forms of Trading

The issue of e-tailing and its effect on sales is always a contentious point especially when applying national figures at the local level. In response to the economic climate MapInfo have revised their assessment of Special Forms of Trading (SFT) i.e. sales which do not take place in stores including internet sales.

MapInfo 09/02 recommends revised reductions for SFT and these along with our previous 2008 assumptions are highlighted in the table below.

Summary Table of 2008 and 2009 SFT Rates

Convenience and Comparison SFT Rates

SFT RATE (%)	2008 RATE	2009 RATE
Convenience	1.7	1.9
Comparison	5.8	5.4

Source: *2008 Rate based on MapInfo Explanatory Volume 2003 Release (Table 2)*

2009 Rate based on MapInfo Explanatory Volume 2008 Release (Table 2)

Total Available Expenditure

There is an increase in total convenience expenditure towards the latter part of the assessment over the previous 2008 study. Total comparison expenditure overall is less than previously predicted due to the more conservative assumptions regarding growth in expenditure between 2008-2019. Overall changes however are not considered significant.

Turnover per Square Meter/Efficiency

The downturn in the economy has resulted in many retailers struggling to increase or even maintain sales densities. It is therefore appropriate in providing an update to our retail assessment to consider the implications of reduced efficiency rates and turnover per sq m. This efficiency represents the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs such as rent, service charges etc by increasing their average sales density.

PPS6 acknowledges (paragraph 2.3.4) the importance of this ability and advocates a 'realistic assessment of forecast improvements in productivity and the use of floorspace'.

Previous efficiency rates for comparison goods range between 1.5 and 2.5%. Forecasters are now advising that this is reduced to between 1.5 and 0.5%. Given the limited increase in comparison expenditure growth to 2026 we have reduced the sales efficiency to 1.5% (down from the previously quoted 2.5%).

The implications of these changes are considered in the next section.

Updated Capacity Forecast

Summary tables comparing the identified convenience and comparison capacity identified in our 2008 and the 2009 update, to 2025 are provided below. Full floorspace capacity tables for each centre showing capacity over the test dates of 2008, 2013, 2018, 2023 and 2025 are available in Appendix 2 (Tables 5, 11, 14, 17, 20 and 23). A map showing the different zones is provided in Appendix 1.

Summary Table of 2008 and 2009 Floorspace Capacity Figures to 2025

Convenience Floorspace Capacity (sq m net)

SQ M NET	FELIXSTOWE	WOODBRIDGE	ALDEBURGH	SAXMUNDHAM	LEISTON	FRAMLINGHAM
2008	1,439	723	-95	1,158	710	240
2009	1,374	840	-66	1,024	893	319

Source: Table 5,11,14,17,20 and 23 of 2008 Retail Study and 2009 Update

Summary Table of 2008 and 2009 Floorspace Capacity Figures to 2025

Comparison Floorspace Capacity (sq m net)

SQ M NET	FELIXSTOWE	WOODBRIDGE	ALDEBURGH	SAXMUNDHAM	LEISTON	FFRAMLINGHAM
2008	9,165	6,441	419	1,022	1,469	772
2009	10,733	9,193	647	1,663	2,378	1,185

Source: Table 5,11,14,17,20 and 23 of 2008 Retail Study and 2009 Update

In summary, convenience capacity at the test dates of 2008, 13, 18, 23 and 25 remain largely unchanged. Although with the exception of Felixstowe and Saxmundham all centres experience increased capacity towards the end of the study period due to the revising of expenditure growth rates and increased population. Saxmundham's capacity reduced as a result of Waitrose occupying the former Somerfield. Accordingly we revised the stores turnover per sq metre to reflect this, thereby increasing the store's turnover and reducing available expenditure and capacity.

Comparison capacity is more subdued over the short to medium term (up to 2018) as a result of the reduced growth rate assumptions. However, with the exception of Felixstowe capacity at 2023 either remains in line with the 2008 estimates or increases. By 2025, due to increased population and allowing for more optimistic growth, capacity across all centres increases.

The greatest increases are evident in Felixstowe (up 1,568 sq m net at 2025) and Woodbridge (up 2,752 sq m net at 2025) which until 2025 were both displaying less capacity than identified in our 2008 assessment.

Conclusions

This update is intended to reflect the current commentary on the state of the economy and the revised phasing of housing projections. It should be read in conjunction with CB Richard Ellis's 2008 Retail Assessment.

In undertaking retail assessments regard is had to a number of variables which can change over time. Accordingly, long term floorspace projections (beyond 2018) should be treated with caution and only be used as a broad guide, particularly when translated into development plan allocations or when used to guide development control decisions.

Protected surplus expenditure is primarily attributed to projected growth in spending per capita. If growth and expenditure is lower than forecast, then the scope for additional floorspace will be reduced. In line with PPS6 therefore, assessments should be monitored and reviewed i.e. every five years.

Having made revised assumptions to reflect the state of the economy, population projections and housing phasing overall there has been little significant change over the plan period. Therefore our previous recommendations provided with our 2008 Retail Assessment remain.

Appendix 1: Suffolk Coastal District Council Catchment Map

1

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Appendix 2: Retail Capacity Tables

2

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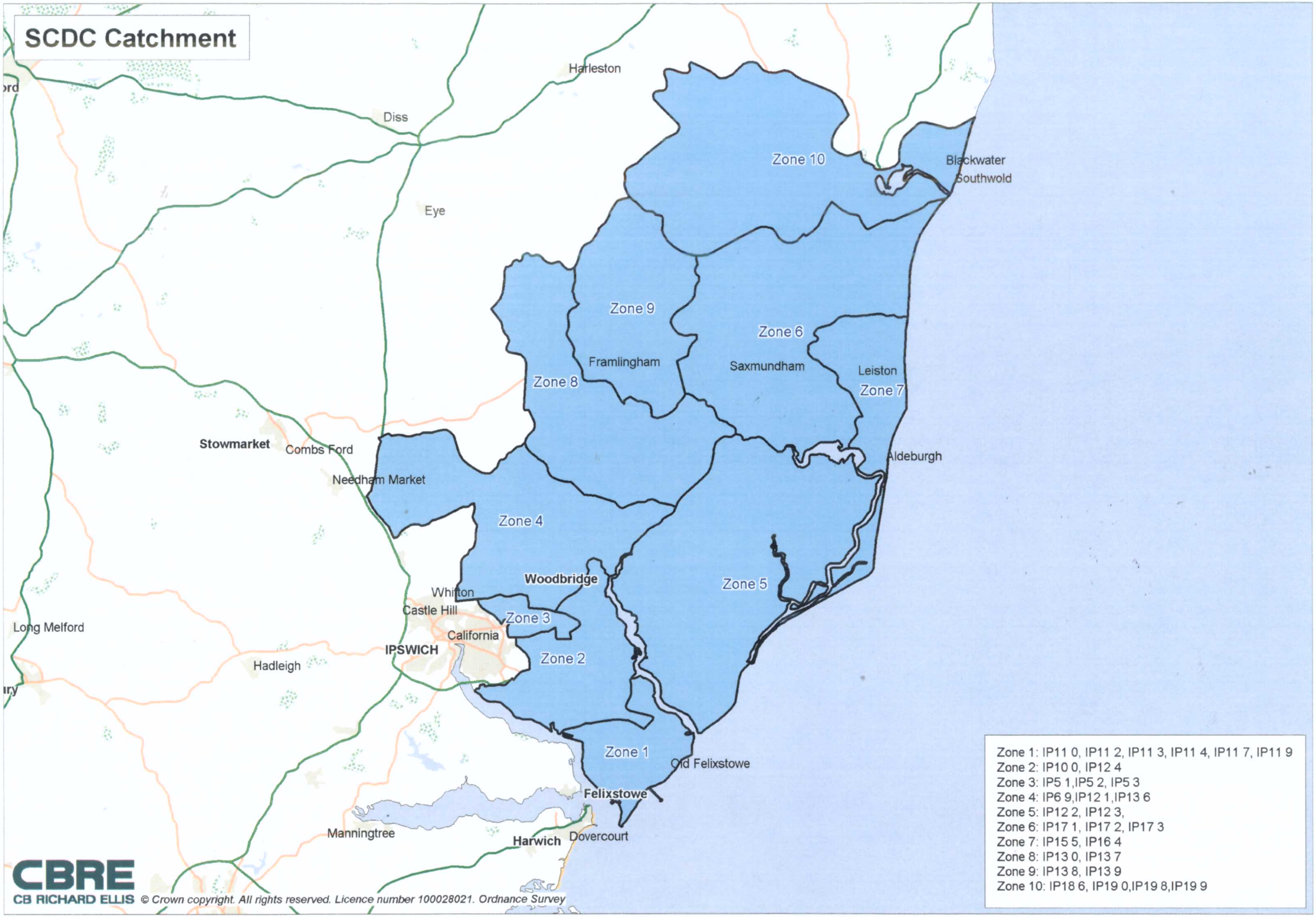
SCDC Catchment



Zone 1: IP11 0, IP11 2, IP11 3, IP11 4, IP11 7, IP11 9
Zone 2: IP10 0, IP12 4
Zone 3: IP5 1,IP5 2, IP5 3
Zone 4: IP6 9,IP12 1,IP13 6
Zone 5: IP12 2, IP12 3,
Zone 6: IP17 1, IP17 2, IP17 3
Zone 7: IP15 5, IP16 4
Zone 8: IP13 0, IP13 7
Zone 9: IP13 8, IP13 9
Zone 10: IP18 6, IP19 0,IP19 8,IP19 9

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SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY SEPTEMBER 2009

TABLE 1A
SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	POPULATION 2008	2013	2018	2023	2025
1	IP11 0/2/3/4/7/9	30,405	30,689	31,212	31,493	31,606
2	IP10 0; IP12 4	10,759	11,218	11,789	12,296	12,507
3	IP5 1/2/3	17,586	19,072	20,882	22,636	23,397
4	IP6 9; IP12 1; IP13 6	15,874	16,450	17,180	17,798	18,055
5	IP12 2/3	8,951	9,739	10,721	11,664	12,075
6	IP17 1/2/3	11,416	12,343	13,452	14,542	15,013
7	IP15 5; IP16 4	9,262	9,604	10,016	10,387	10,540
8	IP13 0; IP13 7	7,193	7,320	7,498	7,633	7,688
9	IP13 8; IP13 9	6,580	6,899	7,281	7,630	7,777
10	IP18 6; IP19 0/8/9	15,081	15,665	16,518	17,162	17,430
TOTAL		133,107	138,999	146,549	153,242	156,088

TABLE 1B
POPULATION GROWTH RATES

GROWTH RATES 2008-2013 (%)	2008-2018 (%)	2008-2023 (%)	2008-2025 (%)
0.9	2.7	3.6	4.0
4.3	9.6	14.3	16.3
8.4	18.7	28.7	33.0
3.6	8.2	12.1	13.7
8.8	19.8	30.3	34.9
8.1	17.8	27.4	31.5
3.7	8.1	12.1	13.8
1.8	4.2	6.1	6.9
4.8	10.7	16.0	18.2
3.9	9.5	13.8	15.6
4.4	10.1	15.1	17.3

SOURCE: MapInfo Corporation data for Suffolk Coastal, September 2009 (2006 based population projections)
2008 & 2018 taken from MapInfo Projections. Population growth from 2018-2023 based on previous 5 year growth rate
2023-2025 population grown at 2 year growth rate

TABLE 1C
SURVEY AREA POPULATION FORECASTS BASED ON COUNCILS HOUSING PROJECTIONS

Catchment Zone	Postcode Sector Groupings	POPULATION 2008	2013	2018	2023	2025	
1	IP11 0/2/3/4/7/9	993	993	412	412	412	
2	IP10 0; IP12 4	682	682	325	325	325	
3	IP5 1/2/3	682	682	325	325	325	
4	IP6 9; IP12 1; IP13 6	811	811	244	244	244	
5	IP12 2/3	54	54	0	0	0	
6	IP17 1/2/3	497	497	82	82	82	
7	IP15 5; IP16 4	939	939	163	163	163	
8	IP13 0; IP13 7	54	54	0	0	0	
9	IP13 8; IP13 9	497	497	82	82	82	
10	IP18 6; IP19 0/8/9	54	54	0	0	0	TOTAL
TOTAL		5,262	5,262	1,632	1,632	1,632	15,420

SOURCE: Based on Table 2: Housing Supply 2008-2025 - Proposed Distribution, Suffolk Coastal Distirct Council (2009)
(Housing supply data includes Allocations, Outstanding planning permissions and 'Urban Potential' data as well as proposed housing supply to be distributed among 'Market Towns' and 'Key Service Centres')

NOTES:
1) Occupancy at 2 people per unit (Private Sector Housing Renewal Strategy, August 2007, Suffolk Coastal District Council). As per CBRE 2008 Study.
2) A total housing supply of 7,710 is added, equating to a additional population of 15,420. As per CBRE 2008 Study. Only the phasing has differed from 2008 Study.
3) Housing distribution in Zone 1 includes Felixstowe and The Trimleys Peninsula. As per CBRE 2008 Study.
4) Proposed housing supply in the Ipswich Policy Area is split between Zone 2 (40%), Zone 3 (40%) and Zone 4 (20%). As per CBRE 2008 Study.
5) All 'Outstanding planning permissions' and 'Urban potential' and 'Outstanding allocations from the previous plan' have been included in 2008-2013.
6) All Minimum new allocations (greenfield) have been included to come forward from 2008-2025
7) Housing proposed for 'Market Towns' and 'Key & Local Service Centres' have been split between the zones containing the main towns (Zones 1,2,3,4,6,7 and 9).
8) Housing proposed 'District Wide' have been split equally across the 10 zones and included to come forward in 2008-2013.
9) Base date for all figures is 17/08/2009. All figures have been rounded.

TABLE 1
TOTAL SURVEY AREA POPULATION FORECASTS

Catchment Zone	Postcode Sector Groupings	POPULATION 2008	2013	2018	2023	2025
1	IP11 0/2/3/4/7/9	31,398	32,674	33,380	34,092	34,627
2	IP10 0; IP12 4	11,441	12,615	13,482	14,387	14,959
3	IP5 1/2/3	18,268	20,484	22,530	24,747	25,903
4	IP6 9; IP12 1; IP13 6	16,685	18,097	18,992	19,920	20,451
5	IP12 2/3	9,005	9,851	10,718	11,662	12,072
6	IP17 1/2/3	11,913	13,374	14,539	15,798	16,085
7	IP15 5; IP16 4	10,201	11,518	12,107	12,718	13,070
8	IP13 0; IP13 7	7,247	7,431	7,565	7,701	7,755
9	IP13 8; IP13 9	7,077	7,913	8,374	8,858	9,110
10	IP18 6; IP19 0/8/9	15,135	15,779	16,395	17,034	17,300
TOTAL		138,369	149,736	158,082	166,917	171,331

SOURCE: Based on Table 2: Housing Supply 2008-2025 - Proposed Distribution, Suffolk Coastal Distirct Council (2009)
(Housing supply data includes Allocations, Outstanding planning permissions and 'Urban Potential' data as well as proposed housing supply to be distributed among 'Market Towns' and 'Key Service Centres')

NOTES:
1) Occupancy at 2 people per unit (Private Sector Housing Renewal Strategy, August 2007, Suffolk Coastal District Council). As per CBRE 2008 Study.
2) A total housing supply of 7,710 is added, equating to a additional population of 15,420. As per CBRE 2008 Study. Only the phasing has differed from 2008 Study.
3) Housing distribution in Zone 1 includes Felixstowe and The Trimleys Peninsula. As per CBRE 2008 Study.
4) Proposed housing supply in the Ipswich Policy Area is split between Zone 2 (40%), Zone 3 (40%) and Zone 4 (20%). As per CBRE 2008 Study.
5) All 'Outstanding planning permissions' and 'Urban potential' and 'Outstanding allocations from the previous plan' have been included in 2008-2013.
6) All Minimum new allocations (greenfield) have been included to come forward from 2008-2025 (Zones 1,2,3,4,6,7 and 9).
8) Housing proposed 'District Wide' have been split equally across the 10 zones and included to come forward in 2008-2013.
9) Base date for all figures is 17/08/2009. All figures have been rounded.

TABLE 2
SURVEY AREA RETAIL EXPENDITURE FORECASTS (2006 prices)

PER CAPITA EXPENDITURE IN	2006 (£)	2008 (£)	2013 (£)	2018 (£)	2023 (£)	2025 (£)
Convenience Goods	1,506	1,554	1,601	1,649	1,740	1,847
Comparison Goods	2,801	3,079	3,553	4,098	5,062	6,430

GROWTH IN PER CAPITA RETAIL EXPENDITURE:
Convenience Goods:
Comparison Goods:

	RETAIL EXPENDITURE									
	CONVENIENCE GOODS					**COMPARISON GOODS**				
Catchment Zone	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	48,780	52,303	55,056	59,333	63967	96,687	116,075	136,804	172,573	222,643
2	17,775	20,194	22,237	25,038	27634	35,231	44,815	55,256	72,825	96,183
3	28,381	32,791	37,160	43,069	47852	56,254	72,771	92,336	125,268	166,552
4	25,922	28,969	31,325	34,668	37779	51,380	64,289	77,838	100,834	131,494
5	13,990	15,770	17,679	20,295	22301	27,730	34,998	43,928	59,031	77,621
6	18,508	21,409	23,980	27,495	29715	36,683	47,512	59,587	79,970	103,425
7	15,849	18,438	19,969	22,135	24144	31,413	40,918	49,621	64,380	84,036
8	11,259	11,896	12,478	13,403	14327	22,316	26,401	31,006	38,984	49,865
9	10,994	12,667	13,812	15,416	16828	21,792	28,111	34,321	44,838	58,572
10	23,514	25,259	27,041	29,646	31958	46,606	56,057	67,192	86,226	111,234
TOTAL	214,972	239,695	260,739	290,498	316,506	426,092	531,946	647,890	844,930	1,101,626

SOURCE: Table 1, MapInfo Corporation data for Suffolk Coastal, September 2009

NOTES:
1) Special Forms of trading removed for convience goods at 1.9% and comparison at 5.4% (MapInfo Exp Explanatory Volume 2008 Release (Table 2))
Conv' SFT =1.9%, so multiplied expenditure by 0.981
Comp' SFT = 5.4%, so multipled expenditure by 0.946
2) Convenience expenditure grown at:
- 2006-2007 at 3.9% (MapInfo 09/02 Brief Table 1: Annual average consumer retail expenditure);
- 2007-2008 at -0.7% (MapInfo 09/02 Brief Table 1: Annual average consumer retail expenditure);
- 2008-2019 at 0.6% (MapInfo 09/02 Brief Table 2: Forcasts of goods based retail expenditure and trends);
- 2019 thereafter at 1.2% (MapInfo 09/02 Table 3: Average annual consumer retail expenditure (Short term trend 1.2% per annum (1998-2008)).
3) Comparison expenditure grown at:
- 2006-2007 at 5.1% (MapInfo 09/02 Brief Table 1: Annual average consumer retail expenditure);
- 2007-2008 at 4.6% (MapInfo 09/02 Brief Table 1: Annual average consumer retail expenditure);
- 2008-2019 at 2.9% (MapInfo 09/02 Brief Table 2: Forcasts of goods based retail expenditure and trends);
- 2019 thereafter at 4.9% (MapInfo 09/02 Table 3: Average annual consumer retail expenditure (Long term trend 5.5% per annum (1998-2008)).

SUFFOLK COASTAL DISTRICT COUNCIL
RETAIL STUDY SEPTEMBER 2009

TABLE 3
FELIXSTOWE TOWN CENTRE DRAW FROM THE CATCHMENT AREA

SCENARIO ONE: **Baseline**

PROPORTION OF SPENDING ATTRACTED TO FELIXSTOWE TOWN CENTRE

Catchment Zone	CONVENIENCE GOODS: CO OP SOLAR 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	TESCO METRO 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	OTHER CONVENIENCE 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	TOTAL 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	COMPARISON GOODS 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	22	22	22	22	22	17	17	17	17	17	9	9	9	9	9	47	47	47	47	47	47	47	47	47	47
2	5	5	5	5	5	0	0	0	0	0	1	1	1	1	1	6	6	6	6	6	14	14	14	14	14
3	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	4	4	4	4	4
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
6	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
9	3	3	3	3	3	0	0	0	0	0	0	0	0	0	0	3	3	3	3	3	1	1	1	1	1
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 4
FORECAST RETAIL SALES FELIXSTOWE TOWN CENTRE (2006 prices)

SCENARIO: **As Table 3**

RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE

Catchment Zone	CONVENIENCE GOODS: CO OP SOLAR 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	TESCO METRO 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	OTHER CONVENIENCE 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	TOTAL 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	COMPARISON GOODS 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	10,573	11,337	11,933	12,860	13,865	8,171	8,761	9,222	9,938	10,714	4,402	4,720	4,969	5,355	5,773	23,146	24,818	26,124	28,153	30,352	45,349	54,443	64,166	80,943	104,428
2	862	979	1,079	1,214	1,340	0	0	0	0	0	249	283	311	351	387	1,111	1,262	1,390	1,565	1,727	4,921	6,260	7,718	10,172	13,435
3	0	0	0	0	0	326	377	427	495	550	92	107	121	140	156	419	484	548	635	706	1,980	2,561	3,249	4,408	5,861
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	246	308	373	483	630
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	609	768	964	1,296	1,704
6	0	0	0	0	0	0	0	0	0	0	120	139	156	179	193	120	139	156	179	193	103	133	167	224	289
7	52	60	65	72	78	0	0	0	0	0	107	124	135	149	163	158	184	200	221	241	201	262	318	413	539
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	369	437	513	645	826
9	355	409	445	497	543	0	0	0	0	0	0	0	0	0	0	355	409	445	497	543	121	156	191	249	326
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	11,841	12,785	13,522	14,644	15,826	8,497	9,138	9,649	10,434	11,265	4,971	5,373	5,692	6,173	6,672	25,309	27,296	28,863	31,251	33,763	53,900	65,329	77,660	98,834	128,037

SOURCE: Tables 2 & 3

TABLE 5
FUTURE SHOP FLOORSPACE CAPACITY IN FELIXSTOWE TOWN CENTRE

SCENARIO: **As Table 3**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS 2008	2013	2018	2023	2025	COMPARISON GOODS 2008	2013	2018	2023	2025
Residents' Spending £000	25,309	27,296	28,863	31,251	33,763	53,900	65,329	77,660	98,834	128,037
Existing shop floorspace (sq m net)	3,333	3,333	3,333	3,333	3,333	11,900	11,900	11,900	11,900	11,900
Sales per sq m net £	7,593	6,006	6,006	6,006	6,006	4,529	4,879	5,257	5,663	5,834
Sales from extg flrspce (£000)	25,309	20,021	20,021	20,021	20,021	53,900	58,065	62,553	67,387	69,424
Residual spending support new shops (£000)	0	7,274	8,841	11,229	13,741	0	7,264	15,107	31,447	58,613
Sales per sq m net in new shops (£)	0	10,000	10,000	10,000	10,000	4,500	4,848	5,222	5,461	5,461
Capacity for new floorspace (sq m net)	0	727	884	1,123	1,374	0	1,498	2,893	5,758	10,733

SOURCE: Table 4, 5a, 5b
Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

TABLE 5a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales £ per sq m net)	Average Turnover (£000s)
Co Op Solar	1,970	100%	1,970	5,239	10,321
Tesco Metro	473	95%	449	12,435	5,588
Other	914	100%	914	4,500	4,113
TOTAL			3,333	6,006	20,021

SOURCE: Suffolk Coastal District Council 2008
'Verdict on Grocery Retailers', Verdict Research Limited, Januar
UK Retail Rankings 2007, Mintel. CB Richard Estimat
IGD 2008

Table 5b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	11,900

(including commitment at Haven Exchange of 1490 sqm gross)

SOURCE: Suffolk Coastal District Council 2008
IGD 2007

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY SEPTEMBER 2009

TABLE 6

FELIXSTOWE OUT OF CENTRE DRAW FROM THE CATCHMENT AREA

SCENARIO ONE: **Baseline**

	PROPORTION OF SPENDING ATTRACTED TO FELIXSTOWE OUT OF CENTRE CONVENIENCE GOODS MORRISONS, GRANGE FARM AVE.				
Catchment	2008	2013	2018	2023	2025
Zone	(%)	(%)	(%)	(%)	(%)
1	27	27	27	27	27
2	8	8	8	8	8
3	0	0	0	0	0
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0

SOURCE: Suffolk Household Survey (March 2003)

TABLE 7

FORECAST RETAIL SALES FELIXSTOWE OUT OF CENTRE (2006 prices)

SCENARIO: **As Table 6**

	RETAIL SALES IN OUT OF CENTRE BY CATCHMENT ZONE **CONVENIENCE GOODS** MORRISONS, GRANGE FARM AVE.				
Catchment	2008	2013	2018	2023	2025
Zone	(£000)	(£000)	(£000)	(£000)	(£000)
1	13,207	14,161	14,906	16,064	17,319
2	1,369	1,555	1,712	1,928	2,128
3	92	107	121	140	156
4	0	0	0	0	0
5	0	0	0	0	0
6	0	0	0	0	0
7	0	0	0	0	0
8	0	0	0	0	0
9	0	0	0	0	0
10	0	0	0	0	0
TOTALS	14,668	15,823	16,739	18,132	19,602

SOURCE: Tables 2 & 6

TABLE 8

FUTURE SHOP FLOORSPACE CAPACITY IN FELIXSTOWE OUT OF CENTRE

SCENARIO: **As Table 6**

	CONVENIENCE GOODS				
	2008	2013	2018	2023	2025
Residents' Spending £000	14,668	15,823	16,739	18,132	19,602
Existing shop floorspace (sq m net)	1,696	1,696	1,696	1,696	1,696
Sales per sq m net £	8,650	11,130	11,130	11,130	11,130
Sales from extg flrspce (£000)	14,668	18,874	18,874	18,874	18,874
Residual spending support new shops (£000)	0	-3,052	-2,135	-742	728
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-305	-213	-74	73

SOURCE: Table 7

TABLE 8a

OUT OF CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales £ per sq m net)	Average Turnover (£000s)
Morrisons, Grange Farm Ave.	2,323	73%	1,696	11,130	18,874
TOTAL			1,696	11,130	18,874

SOURCE: Accessible Retail/Verdict(2007)

TABLE 9
WOODBRIDGE TOWN CENTRE DRAW FROM THE CATCHMENT AREA.

SCENARIO ONE: **Baseline**

ƆRTION OF SPENDING ATTRACTED TO WOODBRIDGE TOWN CENTRE

	CONVENIENCE GOODS																				**COMPARISON GOODS**				
	BUDGENS					CO-OP					OTHER					TOTAL									
Catchment Zone	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	9	9	9	9	9	4	4	4	4	4	3	3	3	3	3	16	16	16	16	16	18	18	18	18	18
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7	7	7	7	7
4	11	11	11	11	11	4	4	4	4	4	7	7	7	7	7	22	22	22	22	22	23	23	23	23	23
5	7	7	7	7	7	4	4	4	4	4	5	5	5	5	5	16	16	16	16	16	24	24	24	24	24
6	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	5	5	5	5	5
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	2	2	2	2
8	0	0	0	0	0	5	5	5	5	5	2	2	2	2	2	7	7	7	7	7	10	10	10	10	10
9	0	0	0	0	0	1	1	1	1	1	2	2	2	2	2	3	3	3	3	3	14	14	14	14	14
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 10
FORECAST RETAIL SALES WOODBRIDGE TOWN CENTRE (2006 prices)

SCENARIO: **As Table 9**

	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE **CONVENIENCE GOODS**																				**COMPARISON GOODS**				
	BUDGENS					CO-OP					OTHER					TOTAL									
Catchment Zone	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	14	17	20	25	32
2	1,515	1,722	1,896	2,135	2,356	653	742	817	920	1,016	591	671	739	833	919	2,760	3,135	3,452	3,887	4,290	6,315	8,033	9,904	13,053	17,240
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3,722	4,815	6,109	8,288	11,020
4	2,838	3,172	3,430	3,796	4,137	992	1,108	1,198	1,326	1,445	1,808	2,021	2,185	2,418	2,635	5,638	6,301	6,813	7,540	8,217	11,582	14,492	17,547	22,730	29,642
5	986	1,112	1,246	1,431	1,572	591	666	747	857	942	661	745	835	959	1,054	2,238	2,523	2,829	3,247	3,568	6,695	8,450	10,607	14,253	18,742
6	0	0	0	0	0	0	0	0	0	0	167	193	216	247	267	167	193	216	247	267	1,866	2,417	3,031	4,067	5,260
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	655	853	1,035	1,342	1,752
8	0	0	0	0	0	574	607	636	684	731	245	259	271	292	312	819	865	908	975	1,042	2,140	2,532	2,974	3,739	4,783
9	0	0	0	0	0	63	73	79	89	97	245	282	307	343	374	308	355	387	432	471	3,016	3,891	4,750	6,206	8,107
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	5,340	6,005	6,572	7,361	8,065	2,873	3,196	3,478	3,876	4,230	3,716	4,170	4,554	5,092	5,561	11,930	13,372	14,605	16,329	17,856	36,006	45,500	55,976	73,705	96,578

SOURCE: Tables 2 & 9

TABLE 11
FUTURE SHOP FLOORSPACE CAPACITY IN WOODBRIDGE TOWN CENTRE

SCENARIO: **As Table 9**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS					**COMPARISON GOODS**				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents' Spending £000	11,930	13,372	14,605	16,329	17,856	36,006	45,500	55,976	73,705	96,578
Existing shop floorspace (sq m net)	1,902	1,902	1,902	1,902	1,902	5,693	5,693	5,693	5,693	5,693
Sales per sq m net £	6,272	4,972	4,972	4,972	4,972	6,325	6,813	7,340	7,907	8,146
Sales from extg flrspce (£000)	11,930	9,456	9,456	9,456	9,456	36,006	38,788	41,786	45,016	46,376
Residual spending support new shops (£000)	0	3,916	5,149	6,873	8,400	0	6,711	14,190	28,689	50,202
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,500	4,848	5,222	5,461	5,461
Capacity for new floorspace (sq m net)	0	392	515	687	840	0	1,384	2,717	5,253	9,193

SOURCE: Table 10
Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

TABLE 11a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£000s)
Budgens	1,065	100%	1,065	5,245	5,586
Co Op	140	100%	140	5,239	733
Other	697	100%	697	4,500	3,137
AVERAGE			1,902	4,972	9,456

Source: Suffolk Coastal District Council 2008
'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.
UK Retail Rankings 2007, Mintel. CB Richard Estimates 2008.
IGD 2008

TABLE 11b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	5,693

SOURCE: Suffolk Coastal District Council 2008
IGD 2008

TABLE 12
ALDEBURGH TOWN CENTRE DRAW FROM THE CATCHMENT AREA.

SCENARIO ONE: **Baseline**

	PROPORTION OF SPENDING ATTRACTED TO ALDEBURGH TOWN CENTRE															COMPARISON GOODS				
	CONVENIENCE GOODS																			
	CO OP, HIGH STREET					OTHER					TOTAL									
Catchment Zone	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
7	7	7	7	7	7	2	2	2	2	2	9	9	9	9	9	4	4	4	4	4
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 13
FORECAST RETAIL SALES ALDEBURGH TOWN CENTRE (2006 prices)

SCENARIO: **As Table 12**

	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE															COMPARISON GOODS				
	CONVENIENCE GOODS																			
	CO OP, HIGH STREET					OTHER					TOTAL									
Catchment Zone	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2021 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	122	155	191	251	332
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	214	239	258	286	312	214	239	258	286	312	227	284	344	445	580
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	126	159	200	269	353
6	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	373	483	606	813	1,051
7	1,082	1,258	1,363	1,511	1,648	365	424	459	509	555	1,446	1,682	1,822	2,020	2,203	1,290	1,681	2,038	2,644	3,452
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	131	154	181	228	292
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	1,082	1,258	1,363	1,511	1,648	578	663	718	795	867	1,660	1,921	2,081	2,306	2,515	2,268	2,915	3,559	4,650	6,060

SOURCE: Tables 2 & 12

TABLE 14
FUTURE SHOP FLOORSPACE CAPACITY IN ALDEBURGH TOWN CENTRE

SCENARIO: **As Table 12**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents' Spending £000	1,660	1,921	2,081	2,306	2,515	2,268	2,915	3,559	4,650	6,060
Existing shop floorspace (sq m net)	670	670	670	670	670	1,576	1,576	1,576	1,576	1,576
Sales per sq m net £	2,478	4,743	4,743	4,743	4,743	1,439	1,550	1,670	1,799	1,854
Sales from extg flrspce (£000)	1,660	3,178	3,178	3,178	3,178	2,268	2,443	2,632	2,836	2,921
Residual spending support new shops (£000)	0	-1,256	-1,097	-872	-663	0	472	927	1,814	3,138
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,309	4,642	4,854	4,854
Capacity for new floorspace (sq m net)	0	-126	-110	-87	-66	0	110	200	374	647

SOURCE: Table 13
Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

TABLE 14a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover £0
Co Op, High Street	220	100%	220	5,239	1,153
Other	450	100%	450	4,500	2,025
AVERAGE			670	4,743	3,178

SOURCE: Suffolk Coastal District Council 2008
'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.
UK Retail Rankings 2007, Mintel. CB Richard Estimates 2008.
IGD 2008

TABLE 14b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	1,576

SOURCE: Suffolk Coastal District Council 2008/IGD
IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY SEPTEMBER 2009

TABLE 15

SAXMUNDHAM TOWN CENTRE DRAW FROM THE CATCHMENT AREA.

SCENARIO ONE: **Baseline**

PROPORTION OF SPENDING ATTRACTED TO SAXMUNDHAM TOWN CENTRE

Catchment Zone	CONVENIENCE GOODS: SOMERFIELD 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	CONVENIENCE GOODS: OTHER 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	CONVENIENCE GOODS: TOTAL 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	COMPARISON GOODS 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1
5	6	6	6	6	6	0	0	0	0	0	6	6	6	6	6	1	1	1	1	1
6	51	51	51	51	51	4	4	4	4	4	55	55	55	55	55	12	12	12	12	12
7	19	19	19	19	19	1	1	1	1	1	20	20	20	20	20	1	1	1	1	1
8	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 16

FORECAST RETAIL SALES SAXMUNDHAM TOWN CENTRE (2005 prices)

SCENARIO: **As Table 15**

RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE

Catchment Zone	CONVENIENCE GOODS: SOMERFIELD 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	CONVENIENCE GOODS: OTHER 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	CONVENIENCE GOODS: TOTAL 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	COMPARISON GOODS 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	160	182	200	225	249	0	0	0	0	0	160	182	200	225	249	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	156	174	188	208	227	0	0	0	0	0	156	174	188	208	227	271	339	410	531	693
5	843	950	1,065	1,223	1,344	0	0	0	0	0	843	950	1,065	1,223	1,344	177	223	280	377	495
6	9,393	10,865	12,170	13,954	15,080	814	942	1,055	1,210	1,307	10,207	11,807	13,225	15,163	16,388	4,543	5,884	7,380	9,904	12,809
7	3,063	3,563	3,859	4,278	4,666	107	124	135	149	163	3,170	3,688	3,994	4,427	4,829	283	368	447	580	757
8	51	54	56	60	64	101	107	112	121	129	152	161	168	181	193	56	67	78	99	126
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	382	410	439	482	519	0	0	0	0	0	382	410	439	482	519	55	66	79	101	131
TOTALS	14,047	16,198	17,978	20,429	22,149	1,023	1,174	1,302	1,480	1,599	15,069	17,371	19,280	21,909	23,748	5,385	6,947	8,674	11,592	15,010

SOURCE: Tables 2 & 15

TABLE 17

FUTURE SHOP FLOORSPACE CAPACITY IN SAXMUNDHAM TOWN CENTRE

SCENARIO: **As Table 15**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS 2008	2013	2018	2023	2025	COMPARISON GOODS 2008	2013	2018	2023	2025
Residents' Spending £000	15,069	17,371	19,280	21,909	23,748	5,385	6,947	8,674	11,592	15,010
Existing shop floorspace (sq m net)	1,844	1,844	1,844	1,844	1,844	1,641	1,641	1,641	1,641	1,641
Sales per sq m net £	8,173	7,326	7,326	7,326	7,326	3,281	3,535	3,808	4,103	4,227
Sales from extg flrspce (£000)	15,069	13,508	13,508	13,508	13,508	5,385	5,801	6,249	6,732	6,936
Residual spending support new shops (£000)	0	3,863	5,772	8,401	10,240	0	1,146	2,425	4,859	8,075
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,309	4,642	4,854	4,854
Capacity for new floorspace (sq m net)	0	386	577	840	1,024	0	266	522	1,001	1,663

SOURCE: Table 16

Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

The former Somerfield is now a Waitrose turning over at £11,882 per sq m (Somerfield turnover was £5,391 per sq m). As a result capacity in 2009 has therefore decresed slightly.

TABLE 17a

TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£000s)
Church Street, 6 units (not implemented)	600	85%	510	4,500	2,295
Waitrose	743	95%	706	11,882	8,387
Other	628	100%	628	4,500	2,826
AVERAGE			1,844	7,326	13,508

SOURCE: Suffolk Coastal District Council

Occupiers of Church Street unknown. Turnover per sqm based upon "other" opperators.

'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.

UK Retail Rankings 2007, Mintel. CB Richard Estimates 2008.

IGD 2008

TABLE 17b

TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	1,641

SOURCE: Suffolk Coastal District Council 2008

IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY SEPTEMBER 2009

TABLE 18

LEISTON TOWN CENTRE DRAW FROM THE CATCHMENT AREA

SCENARIO ONE: **Baseline**

PROPORTION OF SPENDING ATTRACTED TO LEISTON TOWN CENTRE

	CONVENIENCE GOODS															COMPARISON GOODS				
	CO OP SOLAR					OTHER					TOTAL									
Catchment Zone	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1
6	6	6	6	6	6	1	1	1	1	1	6	6	6	6	6	5	5	5	5	5
7	48	48	48	48	48	3	3	3	3	3	50	50	50	50	50	19	19	19	19	19
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	2	2	2	2	2	0	0	0	0	0	2	2	2	2	2	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 19

FORECAST RETAIL SALES LEISTON TOWN CENTRE (2005 prices)

SCENARIO: **As Table 18**

RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE

	CONVENIENCE GOODS															COMPARISON GOODS				
	CO-OP SOLAR					OTHER					TOTAL									
Catchment Zone	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	28	34	40	50	65
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	57	73	90	118	156
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	62	77	93	121	158
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	157	198	248	333	438
6	1,041	1,204	1,349	1,547	1,671	120	139	156	179	193	1,161	1,343	1,505	1,725	1,865	1,975	2,558	3,208	4,306	5,568
7	7,552	8,785	9,515	10,547	11,505	420	489	529	587	640	7,972	9,274	10,045	11,134	12,145	5,834	7,599	9,215	11,956	15,607
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	181	209	228	254	278	0	0	0	0	0	181	209	228	254	278	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
TOTALS	8,774	10,199	11,092	12,348	13,454	540	628	685	765	833	9,315	10,827	11,777	13,113	14,287	8,112	10,538	12,894	16,884	21,992

SOURCE: Tables 2 & 18

TABLE 20

FUTURE SHOP FLOORSPACE CAPACITY IN LEISTON TOWN CENTRE

SCENARIO: **As Table 18**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents' Spending £000	9,315	10,827	11,777	13,113	14,287	8,112	10,538	12,894	16,884	21,992
Existing shop floorspace (sq m net)	1,087	1,087	1,087	1,087	1,087	2,750	2,750	2,750	2,750	2,750
Sales per sq m net £	8,569	4,927	4,927	4,927	4,927	2,950	3,178	3,424	3,688	3,800
Sales from extg flrspce (£000)	9,315	5,356	5,356	5,356	5,356	8,112	8,739	9,415	10,142	10,449
Residual spending support new shops (£000)	0	5,471	6,422	7,758	8,931	0	1,799	3,479	6,742	11,543
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,309	4,642	4,854	4,854
Capacity for new floorspace (sq m net)	0	547	642	776	893	0	417	750	1,389	2,378

SOURCE: Table 19

Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

TABLE 20a

TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£000s)
Co Op Solar	628	100%	628	5,239	3,290
Other	459	100%	459	4,500	2,066
AVERAGE			1,087	4,927	5,356

SOURCE: Suffolk Coastal District Council 2008

'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.

UK Retail Rankings 2007, Mintel. CB Richard Estimates 2008.

IGD 2008

TABLE 20b

TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	2,750

SOURCE: Suffolk Coastal District Council 2008

IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY SEPTEMBER 2009

TABLE 21

FRAMLINGHAM TOWN CENTRE DRAW FROM THE CATCHMENT AREA

SCENARIO ONE: **Baseline**

PROPORTION OF SPENDING ATTRACTED TO FRAMLINGHAM TOWN CENTRE

Catchment Zone	CONVENIENCE GOODS CO OP 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	OTHER 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	TOTAL 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	COMPARISON GOODS 2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
5	3	3	3	3	3	0	0	0	0	0	3	3	3	3	3	0	0	0	0	0
6	0	0	0	0	0	1	1	1	1	1	1	1	1	1	1	1	1	1	1	1
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
8	12	12	12	12	12	2	2	2	2	2	14	14	14	14	14	1	1	1	1	1
9	40	40	40	40	40	6	6	6	6	6	46	46	46	46	46	14	14	14	14	14
10	0	0	0	0	0	0	0	0	0	0	1	1	1	1	1	0	0	0	0	0

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 22

FORECAST RETAIL SALES FRAMLINGHAM TOWN CENTRE (2005 prices)

SCENARIO: **As Table 21**

RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE

Catchment Zone	CONVENIENCE GOODS CO OP 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	OTHER 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	TOTAL 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	COMPARISON GOODS 2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	390	418	440	475	512	0	0	0	0	0	390	418	440	475	512	133	159	188	237	305
2	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	157	200	246	325	429
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	102	127	154	199	260
5	350	394	442	507	558	0	0	0	0	0	350	394	442	507	558	0	0	0	0	0
6	0	0	0	0	0	120	139	156	179	193	120	139	156	179	193	252	326	409	549	711
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	114	148	180	233	305
8	1,396	1,475	1,547	1,662	1,776	200	211	221	238	254	1,596	1,686	1,769	1,900	2,031	319	377	443	556	712
9	4,376	5,041	5,497	6,136	6,698	640	738	805	898	980	5,016	5,779	6,302	7,034	7,678	3,156	4,071	4,971	6,494	8,483
10	100	107	115	126	136	47	51	54	59	64	147	158	169	185	200	0	0	0	0	0
TOTALS	6,612	7,437	8,042	8,906	9,679	1,008	1,139	1,236	1,374	1,492	7,619	8,575	9,278	10,280	11,171	4,232	5,409	6,590	8,594	11,204

SOURCE: Tables 2 & 21

TABLE 23

FUTURE SHOP FLOORSPACE CAPACITY IN FRAMLINGHAM TOWN CENTRE

SCENARIO: **As Table 22**

GROWTH IN SALES PER SQ M — COMPARISON GOODS 1.5 %pa '08-'25

	CONVENIENCE GOODS 2008	2013	2018	2023	2025	COMPARISON GOODS 2008	2013	2018	2023	2025
Residents' Spending £000	7,619	8,575	9,278	10,280	11,171	4,232	5,409	6,590	8,594	11,204
Existing shop floorspace (sq m net)	1,590	1,590	1,590	1,590	1,590	1,808	1,808	1,808	1,808	1,808
Sales per sq m net £	4,792	5,018	5,018	5,018	5,018	2,341	2,521	2,716	2,926	3,015
Sales from extg flrspce (£000)	7,619	7,979	7,979	7,979	7,979	4,232	4,559	4,911	5,291	5,451
Residual spending support new shops (£000)	0	596	1,299	2,301	3,192	0	850	1,679	3,303	5,754
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,309	4,642	4,854	4,854
Capacity for new floorspace (sq m net)	0	60	130	230	319	0	197	362	680	1,185

SOURCE: Table 22

Comparison growth in turnover effeciency 2008-2025 at 1.5% per annum

TABLE 23a

TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£)
Solar Co-Op	1,115	100%	1,115	5,239	5,841
Other	475	100%	475	4,500	2,138
AVERAGE			1,590	5,018	7,979

SOURCE: Suffolk Coastal District Council 2008

'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.

UK Retail Rankings 2007, Mintel. CB Richard Estimates 2008.

IGD 2008

TABLE 23b

TOWN CENTRE COMPARISON GOODS FLOORSPACE

	Net Flsp (sqm)
Total Comparison Goods	1,808

SOURCE: Suffolk Coastal District Council

IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL
RETAIL STUDY SEPTEMBER 2009

TABLE 24
IPSWICH EASTERN FRINGE OUT OF CENTRE DRAW FROM THE CATCHMENT AREA.
SCENARIO ONE: **Baseline**

	PROPORTION OF SPENDING ATTRACTED TO IPSWICH EASTERN FRINGE OUT OF CENTRE																								
	CONVENIENCE GOODS																				**COMPARISON GOODS**				
	TESCO, KESGRAVE					TESCO, MARTLESHAM HEATH					SAINSBURY'S, WARREN HEATH					TOTAL					RETAIL WAREHOUSES				
Catchment	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Zone	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)	(%)
1	0	0	0	0	0	7	7	7	7	7	8	8	8	8	8	15	15	15	15	15	10	10	10	10	10
2	1	1	1	1	1	40	40	40	40	40	13	13	13	13	13	55	55	55	55	55	14	14	14	14	14
3	33	33	33	33	33	39	39	39	39	39	8	8	8	8	8	79	79	79	79	79	21	21	21	21	21
4	2	2	2	2	2	41	41	41	41	41	7	7	7	7	7	50	50	50	50	50	14	14	14	14	14
5	0	0	0	0	0	56	56	56	56	56	4	4	4	4	4	60	60	60	60	60	16	16	16	16	16
6	0	0	0	0	0	16	16	16	16	16	0	0	0	0	0	16	16	16	16	16	11	11	11	11	11
7	0	0	0	0	0	13	13	13	13	13	2	2	2	2	2	15	15	15	15	15	12	12	12	12	12
8	0	0	0	0	0	34	34	34	34	34	3	3	3	3	3	37	37	37	37	37	17	17	17	17	17
9	0	0	0	0	0	20	20	20	20	20	7	7	7	7	7	26	26	26	26	26	10	10	10	10	10
10	0	0	0	0	0	4	4	4	4	4	1	1	1	1	1	4	4	4	4	4	3	3	3	3	3

SOURCE: Suffolk Coastal Household Survey (March 2003)

TABLE 25
FORECAST RETAIL SALES IPSWICH EASTERN FRINGE OUT OF CENTRE (2005 prices)
SCENARIO: **As Table 21**

	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE																								
	CONVENIENCE GOODS																				**RETAIL WAREHOUSES**				
	TESCO, KESGRAVE					TESCO, MARTLESHAM HEATH					SAINSBURY'S, WARREN HEATH					TOTAL									
Catchment	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Zone	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(%)	(%)	(%)	(%)	(%)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)	(£000)
1	61	65	69	74	80	3,500	3,753	3,950	4,257	4,590	3,671	3,936	4,143	4,465	4,814	7,232	7,754	8,162	8,796	9,483	9,739	11,692	13,781	17,384	22,427
2	160	182	200	225	249	7,190	8,168	8,995	10,128	11,178	2,342	2,661	2,930	3,299	3,641	9,692	11,011	12,125	13,652	15,068	5,051	6,426	7,923	10,442	13,791
3	9,352	10,804	12,244	14,191	15,767	10,976	12,682	14,372	16,657	18,507	2,164	2,500	2,833	3,284	3,649	22,492	25,987	29,449	34,132	37,922	11,713	15,153	19,227	26,084	34,680
4	642	717	775	858	935	10,732	11,993	12,969	14,353	15,641	1,691	1,890	2,044	2,262	2,465	13,065	14,600	15,788	17,473	19,041	7,193	9,000	10,897	14,116	18,409
5	49	55	62	71	78	7,884	8,886	9,962	11,437	12,567	493	556	623	715	786	8,426	9,497	10,647	12,223	13,431	4,388	5,539	6,952	9,342	12,284
6	0	0	0	0	0	2,887	3,340	3,741	4,289	4,636	0	0	0	0	0	2,887	3,340	3,741	4,289	4,636	3,885	5,032	6,311	8,470	10,954
7	0	0	0	0	0	2,037	2,369	2,566	2,844	3,103	309	360	389	432	471	2,346	2,729	2,955	3,276	3,573	3,691	4,808	5,831	7,565	9,875
8	0	0	0	0	0	3,808	4,024	4,221	4,534	4,846	329	348	365	392	419	4,138	4,372	4,586	4,926	5,265	3,818	4,516	5,304	6,669	8,531
9	0	0	0	0	0	2,163	2,492	2,718	3,033	3,311	717	827	901	1,006	1,098	2,881	3,319	3,619	4,039	4,409	2,211	2,852	3,482	4,549	5,943
10	0	0	0	0	0	894	960	1,028	1,127	1,214	141	152	162	178	192	1,035	1,111	1,190	1,304	1,406	1,266	1,522	1,825	2,341	3,021
TOTALS	10,263	11,824	13,350	15,420	17,109	52,070	58,667	64,520	72,658	79,591	11,858	13,228	14,391	16,033	17,534	74,191	83,719	92,262	104,110	114,234	52,957	66,541	81,532	106,963	139,914

SOURCE: Tables 2 & 21

TABLE 25a
IPSWICH EASTERN FRINGE CONVENIENCE GOODS FLOORSPACE

Store	Net Flsp (sqm)	Net Con Ratio (%)	Net Convenience Flsp (sqm)	Co Average Sales per sq m net)	Average Turnover (£)
Tesco, Kesgrave	854	95%	811	11,338	9,199
Tesco, Martlesham Heath	3,620	58%	2,100	11,338	23,805
Sainsbury's, Warren Heath	5,913	68%	4,021	8,955	36,007
AVERAGE			6,932	9,956	69,010

SOURCE: IGD 'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.
Accessible Retail/GVA (2007)

TABLE 26
SUMMARY FUTURE SHOP FLOORPACE CAPACITY TO 2025 (SQ M NET)

	Convenience (sq m net)	Comparison (sq m net)
Felixstowe	1,374	10,733
Woodbridge	#REF!	#REF!
Aldeburgh	-66	647
Saxmundham	1,024	1,663
Leiston	893	2,378
Framlingham	319	1,185

Source: Table 5, 11, 14, 17, 20, 23

NOTE

The main differences in the phasing between to 2008 Study and 2009 update are summarised below:

Housing supply	2008 Study	2009 Study
All outstanding planning permissions	Housing dropped in at 2008	Housing dropped in at 2008 and 2013
All urban potential	Housing dropped in at 2008	Housing dropped in at 2008 and 2013
New Allocations	Housing dropped in at the first year of phasing	No specific phasing given, so housing phased over 2008-2025.
Existing/ old allocations from Local Plan	Housing dropped in at 2008	Housing dropped in at 2008 and 2013
Small Windfall	Not referred to in 2008 housing distribution tables	Housing dropped in at 2008 and 2013
Housing in 'Market Towns'	Not referred to in 2008 housing distribution tables	Housing split between Zones 1,2,3,4,6,7 and 9.
Housing in 'Key and Local Service Centres'	Housing split between all zones	Housing split between Zones 1,2,3,4,6,7 and 9.

Whilst some of the assumptions have changed from the 2008 Study, the total number of housing and additional population up to 2025 remains the same in both studies, i.e. 7,710 new housing, equating to an additional population of 15,420.

The assumptions made in the 2009 study are considered more realistic given the current market and the likelihood of longer phasing periods resulting for all housing developments.

It is noteworthy that without finalised housing distribution figures and development schedules, the phasing and distribution of the total housing amongst zones have to be based on assumptions. However we believe that these are realistic.