

RETAIL STUDY UPDATE

Suffolk Coastal District Council

Final Report

December 2008

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1

INTRODUCTION

INTRODUCTION

1.1 CB Hillier Parker was initially appointed in December 2002 to undertake the Suffolk Coastal District Retail Study. The aim of this earlier study was to inform and guide retail planning in the district and, in particular, to inform the preparation of the Council's second review of the Suffolk Coastal Local Plan.

1.2 The District Council's requirements for the original study were as follows:-

- To establish the extent to which the current retail provision in Suffolk Coastal District's town centres satisfies the level and nature of consumer demand within each catchment.
- To estimate the scale and nature of any changes in this provision that may arise in light of:
 - Potential increases in population;
 - Forecast changes in retail expenditure;
 - Changing forms of retail provision; and
 - Possible increases or decreases in the trade draw from competing centres.
- To identify the scale and nature of additional retail provision that may be appropriate in the centres studied to the period 2016.
- To assess the scope for new retail development and the potential to accommodate this within the district.

1.3 Having adopted the updated Suffolk Coastal Local Plan with alterations in March 2006 the Council are now preparing evidence to inform and support their emerging Local Development Framework (LDF). As a result, in May 2008 Suffolk Coastal District Council instructed CB Richard Ellis, previously CB Hillier Parker, to prepare a Retail Study Update.

1.4 As much of the 2003 Study is still relevant, our terms of reference for the Retail Study Update was predominantly to investigate how forecasts and the future housing growth may have impacted upon the retail floorspace needs in the district and to extend our quantitative assessment to a period to 2025 in line with the Council's LDF. Particular regard was had to the town of Felixstowe. This update should therefore be read in conjunction with our previous 2003 Retail Study.

1.5 The scope of work is divided into two stages.

Stage 1 provides the study update, the requirements for which are as follows:-

- Providing an update of the 2003 assessment in respect of current and future population, expenditure per head estimates and turnover efficiency assumptions, taking into account the housing growth identified for the period to 2025;
- Providing a quantitative assessment of convenience and comparison floorspace needs in the district for the period to 2025, having regard to the anticipated levels and location of housing growth identified in the draft LDF Core Strategy, broken down into the six towns of:

– Felixstowe;	– Saxmundham;
– Woodbridge;	– Leiston;
– Aldeburgh;	– Framlingham.

Stage 2 focuses solely on the town of Felixstowe, with the following scope of work to:-

- undertake a sequential assessment of the town;
- identify sites that could realistically come forward for development before 2025 in order to meet any qualitative or quantitative deficiency in retail floorspace;
- have regard for the potential to create development opportunities through the amalgamation of land and buildings, including redevelopment; and
- have regard to the appropriateness of development and viability.

1.6 In order to address the requirements of Suffolk Coastal District Council, our assessment also incorporates comprehensive site visits for town centre health checks; retail capacity assessment, retail demand survey and a review of potential development opportunities.

1.7 Following completion of the original Retail Study in 2003, Planning Policy Statement 6 (PPS6): Planning for Town Centres was published in 2005 and superseded Planning Policy Guidance 6 (PPG6): Town Centres and Retail Developments. This document has had considerable implications for retail in town centres as it introduced six statutory tests by which to test the locations for retail development. More details can be found in Section 2.

1.8 All the town centre health checks in this report are based on the latest GOAD Town Centre Reports and CBRE's own survey of the each town, conducted in July 2008.

Structure of Report

- Section 2 – Review of national, regional and local planning policy;
- Section 3 – Health Checks;
- Section 4 – Quantitative Assessment;
- Section 5 – Development Opportunities in Felixstowe; and
- Section 6 – Conclusions and Recommendations.

2

POLICY FRAMEWORK

POLICY FRAMEWORK

- 2.1** In this section, we review the key policy changes that have been implemented since our last retail study in 2003, and have implications for retail planning in the Suffolk Coastal District.

National Policy Context:

Planning Policy Statement 6: Planning for Town Centres (March 2005)

- 2.2** Planning Policy Statement 6 (PPS6) was published in March 2005. It replaces PPG6 (June 1996) and subsequent policy statements, placing a fresh emphasis on pro-active planning for new development.

- 2.3** *PPS6 sets out the Government's guidance on retail planning policy and planning for town centres. It advises local planning authorities in considering their town centres to "to promote their vitality and viability by planning for growth and development of existing centres; and promoting and enhancing existing centres by focusing development in such centres and encouraging a wide range of services in a good environment, accessible by all."* Local planning authorities should also *"enhance consumer choice by making provision for a range of shopping, leisure and local services, which allow genuine choice to meet the needs of the entire community, and particularly socially-excluded groups; support efficient, competitive and innovative retail, leisure, tourism and other sectors, with improving productivity; and improve accessibility, ensuring that existing or new development is, or will be accessible and well served by a choice of means of transport"*.

- Town centre uses are defined by PPS6 as:
- "Retail (including warehouse clubs and factory outlet centres);
- Leisure, entertainment facilities, and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls);
- Offices, both commercial and those of public bodies; and
- Arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities)".

- 2.4** Furthermore, PPS6 confirms that it is not the role of the planning system to restrict competition, preserve existing commercial interests or to prevent innovation.

- 2.5** PPS6 requires regional planning bodies, and local planning authorities to *"plan positively for growth and development"*. In doing so, they are required to:

- *“Develop and define a hierarchy and network of town centres;*
- *Assess the need for further main town centre uses and ensure there is the capacity to accommodate them;*
- *Focus development in, and plan for the expansion of, existing centres, as appropriate, and at the local level identify appropriate sites in Development Plan Documents;*
- *Promote town centre management, creating partnerships to develop, improve and maintain the town centre, and manage the evening and night-time economy; and*
- *Regularly monitor and review the impact and effectiveness of their policies for promoting vital and viable town centres.”*

2.6 The guidance re-emphasises the Government’s “town centres first” approach in order to seek to strengthen and, where appropriate regenerate existing centres.

2.7 Within a regional planning context, local planning authorities are required to actively plan for growth and manage change in town centres over the plan period by:

- *“Selecting appropriate existing centres to accommodate the identified need for growth by:*
 - *Making better use of existing land and buildings, including, where appropriate, redevelopment; and*
 - *Where necessary, extending the centre.*
- *Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and*
- *Planning for new centres of an appropriate scale in areas of significant growth or where there are deficiencies in the existing network of centres.”*

2.8 In order to facilitate a positive planning approach, PPS6 requires local planning authorities to:

- *“Assess the need for new floorspace for retail, leisure and other main town centre uses, taking account of both quantitative and qualitative considerations;*
- *Identify deficiencies in provision, assess the capacity of existing centres to accommodate new development, including, where appropriate, the scope for extending the primary shopping area and or town centre, and identify centres in decline where change needs to be managed;*
- *Identify the centres within their area where development will be focused, as well as the need for any new centres of local importance, and develop strategies for developing and strengthening centres in their area;*

- *Define the extent of the primary shopping area and the town centre, for the centres in their area on their Proposals Map;*
- *Identify and allocate sites as required;*
- *Review all existing allocations and reallocate sites, which do not comply with PPS6;*
- *Develop spatial policies and proposals to promote and secure investment in deprived areas by strengthening and or identifying opportunities for growth of existing centres; and*
- *Set out criteria based policies, in accordance with PPS6 for assessing and locating new development new development proposals”.*

2.9 In selecting sites for development, PPS6 provides a set of criteria and confirms that local planning authorities should:

- *“Assess the need for development;*
- *Identify the appropriate scale of development;*
- *Apply the sequential approach to site selection;*
- *Assess the impact of development on existing centres; and*
- *Ensure that locations are accessible and well served by a choice of means of transport”.*

2.10 In assessing the need and capacity for additional retail and leisure development, local planning authorities are required to place greater weight on quantitative need for additional floorspace for the specific types of retail and leisure developments. However, qualitative considerations should also be taken into account.

2.11 In planning for growth in their existing centres, local planning authorities are required to allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their Development Plan Documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly.

Emerging National Planning Policy

Draft Revisions to National Planning Policy Statement 6

2.12 The Government is currently undertaking a period of public consultation on proposed revisions to PPS6 to improve the effectiveness of town centre policy.

2.13 The draft revision paper follows the commitment in the Planning White Paper to review the current approach in PPS6 to assessing the impact of proposals outside town centres, in a way which maintains a strong focus on a town centre first policy and which promotes competition and improves consumer choice. The requirement of local planning authorities to plan positively and undertake retail

assessments to inform their planning policy remains.

2.14 Key Changes Proposed by the draft revisions:

- A tougher 'impact test' is being introduced which will give local planning authorities an enhanced tool to prevent large developments that put small shops and town centres at risk. Using this test, local planning authorities will be compelled to examine more factors including retail diversity, consumer spending, loss of trade, impact on town centre investment, scope for regeneration and job creation to ensure town centres are protected against harmful development.
- The revised policy proposes the removal of the 'need test', which is considered a 'blunt instrument' which has 'unintentionally stifled diversity and consumer choice.'
- The revised planning rules propose retention of the 'sequential test' which requires the most central town centre sites to be developed first.
- The Government does not respond to the key recommendation of the Competition Commission to introduce a 'competition test' into the planning system requiring local authorities to assess planning applications for new grocery floorspace over 1,000 sq m for their impacts on competition, in consultation with the Office of Fair Trading. The guidance states the Government will formally respond to the Commission's recommendations, including the competition test proposals 'shortly'.

2.15 This is however only a draft at this stage and little weight should be afforded it at this time.

Competition Commission investigations into Grocery Markets

2.16 The Competition Commission published findings of its investigations into the grocery market in April 2008. The final report focuses on large grocery retailers.

2.17 Key measures now put forward by the commission include:

- A recommendation for the inclusion of a 'competition test' within national planning guidance;
- Inclusion of the Office of Fair Trading (OFT) as a statutory consultee on all applications for planning permission for large food stores; and
- Action to prevent land agreements which may restrict entry into a local market by competitors.

2.18 The report includes recommends specific changes to the way in which the planning system deals with applications for large food stores. Specifically, the Commission recommends the introduction of a 'competition planning test' to supplement existing planning tests, with consultation with the OFT on proposals (including extensions) of over 1,000 sq m net floorspace.

2.19 We understand that the proposed test will involve assessment of a proposal within a 10 minute drive time area of the application site and will be based on the following key elements:

- A fascia test – which considers entry into the catchment acceptable where the operator does not already have a presence or if the proposal is for additional representation in areas where there are already four or more foodstore fascias;
- A market share test – if the operator has a share of net retail floorspace of less than 60% within the catchment then the proposal will be considered acceptable.

2.20 It is thought that operators will be required to provide the OFT with sales area figures of stores within the catchment area and any other information required to satisfy the competition test. We understand that the OFT will also require notification of any acquisitions of over 1,000 sq m net.

Development Plan Interpretation

2.21 Section 38 (6) of the Planning and Compulsory Act 2004 requires planning applications to be determined in accordance with the development plan unless material considerations indicate otherwise.

2.22 The emergence of the above Act has defined the Development Plan as comprising the Regional Spatial Strategy for the region and the Development Plan Documents (taken as a whole) which have been adopted or approved in relation to that area.

2.23 The statutory development plan for this study comprises:

- East of England Plan: The Revision to the Regional Spatial Strategy for the East of England, May 2008
- Suffolk Structure Plan, 2001; and
- Suffolk Coastal Local Plan, adopted 1994 (now includes alterations adopted in 2001 and 2006);

2.24 In addition to the Development Plan the Council's emerging LDF will also need to be taken into account, and will be regarded as a material consideration in the determination of a planning application.

2.25 A summary of the plans and policies that are relevant to retail planning in Suffolk Coastal, and have been established since our 2003 Retail Study are summarised below:

Regional Planning Guidance

2.26 As the Suffolk Structure Plan, 2001 was reviewed in the 2003 Retail Study, and no changes in policy have occurred since this time, the East of England Plan is the only Regional Planning Guidance that will be reviewed.

East of England Plan (May 2008)

2.27 The Regional Spatial Strategy (The East of England Plan) was published on 12 May 2008 by the Government Office for the East of England, and supersedes the former Regional Planning Guidance for East Anglia (RPG6, 2000) which was reviewed as part of our previous retail study.

2.28 The towns of Suffolk Coastal fall within the administrative area covered by the East of England Plan. The Sub-Region of Haven Gateway spans parts of Suffolk Coastal and includes the town of Felixstowe. The strategy for this Sub-Region is set out under Policy HG1 and aims to achieve transformational development and change throughout Haven Gateway.

2.29 Policy SS23 sets out the 'Key Centres for Development and Change' in the Region. This includes Ipswich, however the Suffolk Coastal towns reviewed in this assessment are not designated as Key Centres.

2.30 Policy E5 sets out the regional hierarchy of towns and cities with regard to strategic importance for retail and other town centre purposes. While the Suffolk Coastal towns are not designated as Regional Cities or Major Town Centres, Policy E5 does establish that "below the level of the centres of regional strategic importance local development documents will identify a network of more local town centres, district centres, neighbourhood centres and village centres."

2.31 In accordance and with regard to towns other than Key Centres, Policy SS4 states that Local Development Documents will define the approach to development. Following this, Policy SS6 acknowledges that thriving, vibrant and attractive city and town centres are fundamental to the sustainable development of the East of England, as such Local Development Documents are required to:

- define the role (or redefine it where necessary) of each city or town centre and include a strategy to manage change, promote a healthy mix of uses, build upon positive elements of its distinctive character, and support the development and consolidation of the local cultural heritage;
- ensure that land is allocated or can be made available to meet the full range of the city or town centre's identified needs; and
- protect and enhance existing neighbourhood centres and, where the need is established, promote the provision of new centres of an appropriate scale and function to meet local day to day needs.

2.32 Policy S29 sets out the strategy for 'The Coast', adopting an integrated approach and recognises, for one, the economic and social role of the region's ports, seaside towns and coastal areas important to tourism. Local planning authorities should therefore seek, through their plans and management strategies:

- the regeneration of coastal towns and communities, reinforcing their local economic and social roles and importance to the wider region; and
- the conservation of the coastal environment and coastal waters, including the natural character, historic environment and tranquillity of undeveloped areas, particularly in the areas of coastline and estuary designated as sites of European or international importance for wildlife.

2.33 Furthermore, Local Development Documents should:

- adopt policies which support the restructuring of coastal economies and the provision of jobs to satisfy local needs;
- ensure, in the case of coastal resorts, that:
 - the town centre continues to provide for local and visitor needs;
 - improved linkages are created between the town centre and the main leisure area(s) to secure mutual strengthening of their vitality and viability; and
 - retailing in main leisure area(s) is limited to that necessary to support the vitality and viability of the leisure function without having adverse impacts on the retail function of the town centre.

2.34 Policy HG2: Employment Generating Development; recognises that local authorities should facilitate the increase in jobs by promoting a competitive sub-regional business environment through regeneration initiatives, for example in Felixstowe, including measures to address its failing status as a resort.

2.35 In terms of future housing provision, the Regional Spatial Strategy (RSS) makes provision for a total of 10,200 new dwellings in Suffolk Coastal in the period 2001-2021. When accounting for the dwellings that have already been built, a minimum target of 7,640 dwellings to be built, is left for the remainder of the plan period. This target includes 3,200 dwellings to be built on the edge of Ipswich as part of the Ipswich policy area.

Local Planning Guidance

Suffolk Coastal Local Plan, adopted 1994 (and alterations adopted in 2001 and 2006);

- 2.36** The current Local Plan was adopted by the Council in 1994 and subject to a First Alteration which was adopted in 2001. A Second Alteration, to which CB Richard Ellis's 2003 Retail Study informed, came into effect on 31 March 2006 and deals specifically with affordable housing,
- 2.37** From the 27th September 2007 a number of the policies within the adopted Local Plan effectively expired, whilst others have been 'saved' for development control purposes. The affordable housing policies included in the Suffolk Coastal Local Plan Second Alteration were automatically 'saved' having only been adopted in March 2006. All of the policies summarised below have also been 'saved'.
- 2.38** Policy AP55 outlines the overall retail strategy of the District Council:-
"...to sustain and enhance established town and district centres, local centres and shops serving rural areas. To this end, wherever possible, new retail development of an appropriate scale which is consistent with this objective will be encouraged to locate in existing centres."
- 2.39** Policy AP56 defines the six town centres in Suffolk Coastal District: Aldeburgh, Felixstowe, Framlingham, Leiston, Saxmundham and Woodbridge. These town centre designations aim to ensure that commercial uses do not gradually spread into adjacent residential streets, and that the concentration of shopping floorspace is within a reasonable distance of car parks and public transport facilities. The policy emphasises that town centres are the preferred location for major new shopping, commerce, entertainment and leisure, health and community uses, unless there are other overriding material considerations.
- 2.40** Policy AP57 encourages the establishment of residential accommodation within the Town Centres, particularly on upper floors. However, this should not be at the expense of prime shopping frontages as defined, nor should it be at the expense of a variety of uses in the town centre which adds to its vitality and viability.
- 2.41** The Local Plan recognises the car remains an important means of travel in a predominantly rural district where public transport is not always available. There is therefore a strong demand for car parking in the Town Centre's. Policy AP58 seeks to encourage the use of a range of transport modes whilst monitoring demand for car parking. It aims to ensure that adequate levels of on-street and off-street public spaces are available to meet the commercial, recreational, tourist and residential needs of the Town Centres.

- 2.42** Policy AP61 address the sequential approach as defined in PPS6. This means that first preference for new development will be given to sites in town centres. In the absence of a suitable town centre site, an edge-of-centre site will be considered acceptable, and only where no suitable town centre or edge-of-centre site is available, will an out-of-town site be considered. Policy AP61 outlines a series of criteria with which to judge proposals for new retail development against. The criteria broadly relate to protecting the vitality and viability of town, district and local centres; the rural economy; living conditions of nearby residents; the landscape; highway safety; and car parking provision and alternative modes of transport.
- 2.43** Each of the six town centres fall either partly or entirely within a conservation area. The Local Plan emphasises the importance of ensuring that new development or change is not to the detriment of the Conservation Area, but actually preserves or enhances it. Any new buildings, alterations or other development within a Conservation Area must be considered carefully in conjunction with Policies AP1 (Control of Development and Enhancement) and AP3 (Demolition).
- 2.44** Policy AP179 protects the Prime Shopping Area in Felixstowe. At ground floor level, on Hamilton Road, between Orwell Road and Cobbold Road, changes of use of shops to non-shopping uses will not be permitted. Office uses in Felixstowe town are recognised as being a vital part of the local business economy of town centres, but their use is restricted in the Local Plan. In the prime shopping streets, the change of use of ground floor retail to office will not be permitted. Policy AP180 outlines a series of criteria with which to judge applications for business, office and service uses (on upper floors) and development against.
- 2.45** Highfield Road is recognised in the Local Plan as being the only likely opportunity to enable redevelopment and creation of a shopping centre scheme alongside Hamilton Road. Policy AP181 outlines the criteria with which to judge applications for new development against. These include the effect on residential amenity, the effect on the Conservation Area, access and traffic generation, rear servicing, scale, and consequences for the viability of the Town Centre. The importance of pedestrian priority over vehicles is addressed in Policy AP182, and measures to reduce through traffic in Hamilton Road and Bent Hill are referred to in Policy AP183.
- 2.46** The opportunity for additional convenience goods floorspace in Woodbridge is recognised in the adopted Local Plan. Policy AP255 recognises the benefit of additional, quality, convenience floorspace within the town centre to encourage the vitality and range of town centre shopping facilities. Options to fulfil this objective include extending Budgens in the Turban Centre or development on previously unidentified sites within the town centre. Proposals will be considered against the general policies of the Local Plan.

- 2.47** The redevelopment of the school site on New Street, Woodbridge (New Street/Oak Lane Car Park), is addressed in Policy AP256. The site is allocated on the Proposals Map for mixed use development to incorporate additional public car parking and the retention of the form and character of the old school building. Policy AP257 protects the Prime Shopping Area in Woodbridge Town Centre: The Thoroughfare, between Church Street and Elmhurst Walk. At ground floor level, changes of use of shops to non-shopping uses will not be permitted.
- 2.48** Policy AP258 prevents change of use to residential at ground floor level on Church Street and Market Hill, and Policy AP259 resists the loss of existing residential accommodation in the town centre. Environmental enhancements in Woodbridge town centre are addressed in Policy AP260. A phased programme of improvements to street furniture, planting etc. is referred to in relation to Church Street, Quay Street and Station forecourt and car park.
- 2.49** Town centre policies for Aldeburgh concentrate on enhancement of the environment. Policy AP128 aims to promote measures to ameliorate the impact of traffic and car parking, particularly 'on-street' parking. Policy AP129 seeks to reduce vehicular conflict in the High Street, and improve the environment in this area. Pedestrian priority and the discouragement of non-essential traffic from certain areas is addressed in Policy AP130.
- 2.50** Town centre policies for Framlingham relate broadly to car parking and town centre enhancement. Policy AP139 identifies land at The Elms to be developed for additional car parking to meet the future needs of the town centre. Development will create 70 new parking spaces.
- 2.51** Town centre policies for Leiston recognise the need for additional parking provision towards the year 2006. Policy AP146 refers to land allocated for car parking off Sizewell Road. The phased provision will incorporate pedestrian access to Sizewell Road. Environmental improvements in Leiston town centre are a key objective, and Policy AP147 seeks environmental improvements to the floorspace and street furniture of the High Street and Sizewell Road. New shop fronts must be of a high standard and accord with Supplementary Planning Guidance on shop front design.
- 2.52** Town centre policies for Saxmundham refer to non-shopping uses and new retail development. The High Street represents the prime shopping frontage in the Town Centre and Policy AP155 resists the change of use at ground floor level of 'shops' to other uses, where this will extend or result in a concentration of non-shopping uses. In terms of new retail development, Policy AP156 states that when considering new development particular attention will be paid to the scale and character of the conservation area; the form and function of the town centre as a small market town; and accessibility to parking and public transport.

Emerging Local Development Framework

- 2.53** Suffolk Coastal District Council are currently preparing their Local Development Framework (LDF), to set out the planning policies, proposals and actions for the future development of the district up to 2025 and beyond.
- 2.54** Suffolk Coastal's Core Strategy Preferred Options (December 2008) is currently being consulted upon. With regards to retail in the district, the Core Strategy recognises as one of its key objectives (Objective 7) the need to:
- 2.55** "sustain and enhance the vitality and viability of town centres and to foster market towns as service, employment and retail centres".
- 2.56** Strategic Policy SP25 maintains the sequential approach, establishing that emphasis will be on maintaining and enhancing the viability and vitality of existing retail centres, including the town centres of Felixstowe and the five towns of Aldeburgh, Framlingham, Leiston, Saxmundham and Woodbridge); the Martlesham Retail Park; and district and local centres in the towns and settlements throughout the area.
- 2.57** The five market towns of Woodbridge, Aldeburgh, Framlingham, Leiston and Saxmundham are recognised as vital centres which should be the focus of appropriate levels of commercial and residential development. New retail floorspace will be created in order to meet the identified needs of the district, with existing centres being the priority locations.
- 2.58** In relation to Felixstowe, the threat of competition from Ipswich and out-of-centre retail parks is acknowledged. It is therefore identified that there is a need for additional retail floorspace to be provided in the town centre in order to retain the towns trading position. Strategic Policy SP4 sets out the strategy for Felixstowe, including the expansion of retail and other services in the town centre.
- 2.59** Similarly, town centres Strategic Policies, namely Policy SP5 – Aldeburgh; Policy SP6 – Framlingham; Policy SP7 – Leiston; Policy SP9 – Saxmundham; and Policy SP10 – Woodbridge, establish the need for retail and service offer to be retained and improved in town centres in order to serve the resident and visitor populations.

3

HEALTH CHECKS

HEALTH CHECKS

3.1 In this section of the report we undertake an update of the health checks established in our 2003 Retail Study to consider the current vitality and viability of Suffolk Coastal's six designated town centres, drawing on the indicators set out in paragraph 4.4 of PPS6.

3.2 The six town centres which our detailed assessment covers, includes:

– Felixstowe;	– Saxmundham;
– Woodbridge;	– Leiston;
– Aldeburgh;	– Framlingham.

3.3 Our assessment has been informed by a combination of 'desk based research' and 'on site observations' which were conducted during a weekday in July 2008.

3.4 In particular we have drawn upon Experian GOAD town centre surveys; the data maps of which are broadly in line with the town centre's retailing area defined by Suffolk Coastal's Local Plan. Other research resources such as Promis and Focus Centre reports inform this study, and supplemented where necessary by in house advice from our Retail Agency team.

3.5 To allow continuity, our on site analysis of the centre has followed GOAD retail classification and as such has only counted units considered as part of retail-led shops and services, thus excluding additional uses also found in town centres, such as offices, leisure uses and health services, namely doctors and dentists.

3.6 While our previous assessment also indicated the town centre's commercial yields through reliance on information produced by Focus, this data is unfortunately no longer available. Commercial yield data on non-domestic property is used as it provides an indication of the confidence of investors in the long-term profitability of the town centre. However, both the Government and the RICS have warned that this requires careful analysis and its limitations must be understood. Yield on property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect the future rental growth, the lower the initial yield which an investor would be prepared to accept. Conversely, a higher yield reflects the lower expectation of future rental growth prospects. Yields are therefore an indicator of expectations of the general economic prospects for a town centre.

3.7 It is notable that since the drafting of this report a number of high street operators have ceased trading, of particular to Suffolk Coastal, Woolworths in Felixstowe and Woodbridge has closed, which creates development opportunities in these centres. It has not been part of this report brief to consider these in detail.

3.8 The announcement in mid 2008 following the take over Somerfield by Co-op resulted in the disposal of a number of former Somerfield foodstores. We are aware that Somerfield in Saxmundham is now to become a Waitrose, and while details of Waitrose's aspirations for the site has not been disclosed to us, it is reasonable to assume that the Waitrose unit will turnover at a higher level than the former Somerfield, therefore potentially reducing the availability of convenience capacity in the centre.

3.9 With regard to the structure of the report, the two largest towns of Felixstowe and Woodbridge are dealt with first. Following this, a qualitative assessment of Aldeburgh, Saxmundham, Leiston and Framlingham is provided, which are all identified as 'towns' in Policy AP56 of the adopted Suffolk Coastal Local Plan (February 2001). These centres are smaller than Felixstowe and Woodbridge, and limited published performance data is available. Experian GOAD does not survey all of these centres. Of those that are surveyed, data is now approximately 3 years old. As such the health checks largely draw on data provided by CB Richard Ellis' on site survey, carried out in July 2008. For each centre, the following is considered:

1. Location, physical characteristics and layout of each centre;
2. The retail composition of the centre;
3. The range of uses, including vacancy rates;
4. The key retailers;
5. The state of the town centre environment, including any key features;
6. The centre's accessibility; and
7. The level and quality of car parking

FELIXSTOWE

- 3.10** Felixstowe town centre is located on the coast of the Felixstowe peninsular. It is the largest of the six town centres in the district. The town centre has a regular comparison goods shopping population of 16,049 which equates to a 4% catchment penetration rate. Ipswich remains Felixstowe's primary competitor, absorbing 58% of the total comparison catchment population, followed by Colchester attracting 13% of the shopping population (source: CBRE, 2008).
- 3.11** Felixstowe is an Edwardian seaside tourist resort with extensive seafront. Primarily it is accessed via the A14. The centre's retail catchment is constrained partly by its geographical location – the sea to the east, and the larger centre of Ipswich to the west.
- 3.12** The main shopping provision is located on Hamilton Road, the traditional linear high street, which extends from Hamilton Gardens and Wolsey Gardens in the south, to High Road West and High Road East in the north. This is supplemented by a number of more secondary shopping areas. The town centre to the south of Cobbold Road is part of a designated conservation area. Overall, the centre is fairly elongated; the more compact a centre the stronger it tends to be.

Diversity of Uses

- 3.13** The most recent Experian GOAD survey data for Felixstowe town centre is from March 2007 and identifies a total of 35,136 sq m gross of retail trade and services. As appropriate, the data from this survey has been updated by our own retail survey of the town centre in July 2008 to reflect the latest condition of Felixstowe. Since GOAD's 2007 survey the retail composition of Felixstowe has remained relatively unchanged. With a total of 187 retail outlets, the town centre now has 2 additional comparison units, 1 additional service unit and 2 less vacancies.
- 3.14** Table 3.1 highlights the current composition of Felixstowe by the number of units, and compares it to the situation identified in our previous retail study which was based upon the April 2002 GOAD survey data. It is evident that, as with the 2002 data, the centre has a below average representation of units occupied by retailers in the convenience category. The comparison offer represents over half of the overall provision with 102 units, and equates to 9.41% above the national UK average. This suggests that, Felixstowe has a good comparison representation, and this is considered to be a positive characteristic for a centre of this size.

Table 3.1**Felixstowe Retail Composition by Retail Category and Number of Units, 2002 and 2008**

Retail Category	No. of Units	April 2002		No. of Units	July 2008	
		% of Total	% National Average (% Variance)		% of Total	% National Average (% Variance)
Convenience	14	7.11	9.44 (-2.33)	13	6.95	9.08 (-2.13)
Comparison	103	52.28	48.34 (3.94)	102	54.55	45.14 (9.41)
Service	57	28.93	29.97 (-1.04)	59	31.55	33.30 (-1.75)
Vacant	20	10.15	10.70 (-0.55)	9	4.81	11.17 (-6.36)
Miscellaneous	3	1.52	1.55 (-0.03)	4	2.14	1.31 (0.83)
Total	197	100	100	187	100	100

Source: Experian GOAD Town Centre Report, March 2007 adjusted by CB Richard Ellis Centre Survey, July 2008; Experian GOAD Town Centre Report, April 2002 cited in CB Hillier Parker 2003 [N.B. figures are not directly comparable due to categorisation listed in 2002 and 2007 surveys].

3.15 A more detailed breakdown of our analysis indicates that Felixstowe has a high proportion of comparison retailers in the furniture, carpets and textiles; books, arts/crafts, stationary; florists and gardens; variety, department and catalogue stores and charity, pets and other comparison. Again, this suggests that for a town of its size, Felixstowe provides a reasonable comparison offer. The town centre does, however, have a below average representation in the clothing/fashion categories, indicating the pull of other higher order centres such as Ipswich within the wider catchment area. Normally, a wider representation of the clothing/fashion outlets typifies a stronger centre.

3.16 The provision of service businesses has increased since April 2002, and now accounts for approximately 32% of all retail units in Felixstowe town centre. While travel agents, banks and financial services, and building societies have a higher representation than the national average, restaurants and fast food retailers, hairdressers and beauty salons, laundrettes/dry cleaners, and estate agents tend to have a slightly lower representation than the UK average. Overall, while the service sector has grown nationally, a growing representation in this sector can make for less attractive frontages and a less vibrant shopping centre. During times of economic uncertainty it is often entertainment services, including eating out which is most noticeably affected. A centre overly reliant upon such uses can be susceptible to increased vacancies as a result.

3.17 Table 3.2 compares the 2002 floorspace figures for Felixstowe to the most recent Experian survey conducted in March 2007. Unlike the assessment of uses by units, the floorspace data was not updated by CB Richard Ellis as part of our

health check. The table indicates that while there have been slight increases in convenience, comparison and service business floorspace, and a decrease in vacant units, overall little significant change in the representation has occurred in this five year period. There has however been a considerable decrease in the number of units categorised as miscellaneous. As the data is taken from two separate sources; the Suffolk Coastal Land Use Survey (2002) and the Experian GOAD Town centre report (2007), we suspect the significant decrease is accountable more on categorising variations of different uses, rather than a significant increase in the actual number of miscellaneous units themselves.

Table 3.2

Felixstowe Retail Composition by Retail Category and Floorspace, 2002 and 2007

Retail Category	April 2002		March 2007		
	Floorspace (sq m)	% of Total	Floorspace (sq m)	% of Total	% National Average (% Variance)
Convenience	6,254	16	6,280	17.87	16.69 (1.18)
Comparison	16,769	44	18,692	53.20	51.00 (2.2)
Service	7,073	18	8,278	23.56	21.78 (1.78)
Vacant	1,005	3	883	2.51	9.41 (-6.9)
Miscellaneous	7,390	19	1,003	2.86	1.11 (1.75)
Total	38,491	100	35,136	100	100

Source: Experian GOAD Town Centre Report, March 2007; Suffolk Coastal District Council Land Use Survey, 2002 cited in CB Hillier Parker 2003 [N.B. figures are not directly comparable due to categorisation listed in 2002 and 2007 surveys].

3.18 The table highlights that, on average, comparison retailers are in slightly smaller units than the national average. Retailer trends suggest that occupiers will continue to demand larger units to meet requirements, and where possible, the creation of larger units would be welcome in Felixstowe to assist in attracting occupiers. In addition, vacant units tend to be smaller in the centre and arguably their small size may not be attractive to prospective retailers.

3.19 While not categorised as part of the retail and services offer and therefore not included in the data, Felixstowe town centre also includes a number of additional uses which help to enhance the attractiveness of the centre. Leisure services, for example, include a two-screen cinema and bingo hall; hotels; a library; betting offices and several public houses. There are also two doctors' surgeries and a dentist, however the provision of offices appears more limited with scattered small office units providing for example some independent legal and other business services.

- 3.20** Felixstowe has several markets providing a different retail offer in the town centre. The Great Eastern Square Market operates every Thursday from 9am to 4pm and sells a variety of comparison goods, including clothes, household items, plants and disability vehicles. This market along with the Country Market, which opens every Friday on High West Road, offering homemade food, plants and crafts, provide vibrancy to the northern end of the town.
- 3.21** Felixstowe's Sunday Market also offers a variety of convenience and comparison goods, including specialist foods, clothes, household items, plants and books. Although open from 8am to 4pm the market is located outside the town centre on Sea Road. Finally, a framers market operates adjacent to the PSA on the first Saturday of every month. All of these help enhance Felixstowe's shopping experience.

Retailer Representation

- 3.22** A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre, and in March 2007 multiple retailers occupied 74 of the then 185 retail units in Felixstowe (40%). This figure is above the national average of 33.7%.
- 3.23** Experian GOAD highlight 30 key attractors as a benchmark to judge centres against, and it is evident from our analysis that Felixstowe has 13 of these retailers (Table 3.3). Those not present are in many cases department/ variety stores and fashion retailers. Indeed, Felixstowe lacks a large comparison anchor store, although attracting such a retailer may well be challenging for the centre.

Table 3.3
Key Attractors in Felixstowe Town Centre

Multiple Retailer	No. in Felixstowe Town Centre	Mixed Goods Multiple Retailers	No. in Felixstowe Town Centre
Argos	1	New Look	1
BhS	0	Next	0
Boots The Chemist	1	River Island	0
Burton	1	Sainsbury's	0
Carphone Warehouse	1	Superdrug	1
Clarks	1	Tesco	1
Clintons	1	Topman	0
Currys	0	Topshop	0
Debenhams	0	Virgin Megastore	0
Dorothy Perkins	1	Vodafone	0
H & M	0	WHSmith	1
HMV	0	Waitrose	0
House of Fraser	0	Waterstones	0
John Lewis	0	Wilkinsons	0
Marks & Spencer	1	Woolworths	1

Source: Experian GOAD Town Centre Report, March 2007.

Note: Since the completion of the town's health check Woolworth's has ceased the trading of all its stores.

3.24 The Primary Shopping Area (PSA) defined in the adopted local plan remains unchanged from our previous 2003 Retail Study. The frontages along Hamilton Road, between Cobbold Road and Orwell Road continue to function as the PSA, and includes Boots the Chemist, WH Smith, Marks & Spencer, Burtons and Dorothy Perkins offering comparison goods. Iceland, a Tesco Metro and the foodhall in Marks & Spencer represent the main convenience offer in this area (a larger Co-op foodstore lies outside the PSA to the north).

3.25 While several banks (Lloyds TSB, Halifax and HSBC bank), and some eateries, for example Wimpy and Subway are located in the PSA the main cluster of service sector outlets remains located at the southern end of Hamilton Road between Orwell Road and Wolsey Gardens. This area is characterised by several restaurants, some of which have been established prior to our last assessment in 2003, including Blue Nann Indian Restaurant and the Saigon Restaurant, however the Bella Roma and Sagor Spice Restaurant and the Bonnet café no longer exist. This more secondary shopping area has a good concentration of independent retailers, creating a more diverse offer.

3.26 In terms of convenience representation, Felixstowe remains anchored by the 1,970 sq m net Co-op Solar supermarket to the north. Since last reviewed this store has been improved as part of a £1.2 million investment programme. The supermarket has been refitted to now include a new sandwich shop selling fresh and hot take away food and bakery items cooked on the premises. A fish bar and new delicatessen also enhance the food offer. The store also includes a

confectionary, tobacco and news counter (CTN) and some non-food goods including books and DVDs. Overall this moderate sized store is trading well; the accompanying 250 space free car park located at the rear of the store was also at full capacity.

3.27 As noted above, and consistent with 2003, a Tesco Metro, Iceland and the foodhall in Marks & Spencer continue to provide the town's other main convenience offer. The Tesco Metro (475 sq m net) on Hamilton Road was busy at the time of our visit. Although the store includes a CTN counter, food provision accounts for almost the entire store. The Iceland located in the heart of the PSA has a floorspace of 494 sq m net. The store and a small car park were busy at the time of our visit. The foodhall, accounting for around two-thirds of Marks & Spencer, appeared quieter than the Tesco Metro and Iceland stores at the time of our visit. While the Marks & Spencer brand tends to represent a higher end convenience/ comparison offer, the store appeared tired and less uninviting than stores of its competitors.

Retailer Demand

3.28 Table 3.4 provides a detailed picture of the requirements for Felixstowe town centre. In total the Focus Property Intelligence database identified 10 requirements, including 5 from comparison retailers and 4 from service providers. In total, these operators require between approximately 2,768 sq m and 4,652 sq m net of retail floorspace.

Table 3.4

Felixstowe Town Centre Requirements, 2008

	Company	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
1	InStore	-	-	A1	743	1,115
2	InStore	-	-	A1	650	930
3	Phones 4 U	Phones	Comparison	A1	56	140
4	Poundland	All	Comparison	A1	325	743
5	Gamestation	Games	Comparison	A1	120	167
6	Billabong	Clothing	Comparison	A1	130	465
7	Peacocks	Clothing	Comparison	A1	418	511
8	Costa Coffee	Café	Service	A3	93	93
9	Dominos Pizza Group Ltd	Fast Food	Service	A5	93	111
10	Barracuda Group Limited	Bar/Restaurant	Service	A3/A4	140	350
Total Floorspace Requirement					2,768	4,652

Source: Focus – Focusnet UK, June 2008

- 3.29** Retailer demand for Felixstowe has fallen since last surveyed in April 2003. As in April 2003, Peacock's, Gamestation and Domino's Pizza still require a store in the town centre, however there is no longer any specific demand for a foodstore operator and the requirement from fashion/clothing outlets has reduced. We are also aware of demand from a hotelier.
- 3.30** The use of retail demand databases do however carry health warnings as they only represent those operators that subscribe. Many high street operators will have a broad requirement across the country whilst others may be specific in terms of location.
- 3.31** Overall retail demand is reasonable for Felixstowe. Available space in the town centre however may not be suitable for some of these retailers, especially as some of these requirements have been in existence for a number of years. Retail demand is of a similar magnitude previously reported in 2003

Shopping Rents

- 3.32** Rental values can provide a measure of the primacy of streets and locations in a town centre. Furthermore the level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). We have identified Prime Zone A rental values and compared them with competing centres also located in the eastern region (Table 3.5).
- 3.33** The latest data recorded in May 2008 show Prime shop rents in Felixstowe at £6 per sq m Zone A; £14.40 lower per sq m than Norwich (representing the highest rental levels of all the comparative centres), and £8.90 per sq m lower than Ipswich. While Felixstowe rental levels are the weakest of the competing centres, they have improved since last surveyed in May 2003, when the gap between Felixstowe and Lowestoft was £2.40 per sq m; the gap recorded in May 2008 has since reduced to £0.70 per sq m. It should also be noted however that rents in Ipswich – the nearest competing centre to Felixstowe – have increased considerably, suggesting that this town has enhanced its attractiveness to retailers. This also reflects the trend that retailers have tended to focus their activities in the top 100 or so UK centres.

Table 3.5**Felixstowe's Prime Zone A Rents and competing centres (£ per sq m)**

	May 2003	May 2004	May 2005	May 2006	May 2007	May 2008
Felixstowe	3.90	3.90	4.40	6.00	6.00	6.00
Norwich	16.70	16.70	19.00	19.50	20.40	20.40
Ipswich	11.60	11.60	13.00	13.50	14.90	14.90
Lowestoft	6.30	6.30	6.30	6.50	6.70	6.70

Source: CB Richard Ellis Research, July 2008

Vacant Retail Property

3.34 According to the most recent Experian GOAD Survey (March 2007), 11 vacant units were recorded in Felixstowe town centre, equating to a vacancy rate of 5.95%, well below the national average of 11.17% (Table 3.6).

Table 3.6**Felixstowe Town Centre by Vacant Units and Vacant Floorspace, March 2007**

Vacant Units	Percentage of Total Units	National Average	Sq m	Percentage of Total Floorspace	National Average (%)
11	5.95%	11.17%	883	2.51%	9.41

Source: Experian GOAD Town Centre Report, March 2007

3.35 CB Richard Ellis's own centre survey of Felixstowe in July 2008, updated the Experian GOAD data, and indicates that there are now only 9 vacant units. This equates to a unit vacancy rate of 4.81% in the town centre which remains considerably lower than the national average. Our survey highlighted that while 6 vacant units have become re-occupied since the Experian GOAD Survey in March 2007, 4 further units have also become vacant. Apart from a cluster of 5 vacant units on St Andrews Road, including a large former furniture wholesaler store, all other vacancies in the town centre are scattered. As reported in our 2003 Study, Felixstowe continues to experience little problems in the level of reoccupation although the main retailers who take up vacant units remain largely service providers and smaller comparison goods retailers. Vacant units in the centre are also typically small and in poorer trading locations – there are currently no vacancies within the PSA. Overall, available retail space is limited.

3.36 Felixstowe's current vacancy rate suggests that the town is performing well with a lower number of vacant units recorded than in 2003. With such a low vacancy rate the ability of the centre to accommodate requirements from retailers for new/alternative premises is limited.

Pedestrian Flows

- 3.37** Observations from our centre survey of Felixstowe town in July 2008 revealed that, as expected, the highest levels of pedestrian movement are within the PSA on Hamilton Road, between Cobbold Road and Orwell Road. Pedestrian flows are much weaker in the north of the town, between High Road West and York Road, and to the south, between Orwell Road and Hamilton Gardens. This reflects the more secondary nature of these retailing areas. Even so, any opportunity to strengthen the offer in these more peripheral localities could have benefits through increasing footfall draw and custom in these areas.

Accessibility

- 3.38** In relation to the accessibility of Felixstowe, the situation is unchanged from our 2003 study. The main vehicular access is via the A14, whilst a limited train service operates from the train station in the north of the centre linking to Ipswich and beyond.
- 3.39** Traffic flow in the town centre is considerable where Hamilton splits around the pedestrian 'triangle' and joins Crescent Road. The majority of on street parking bays were in use and all of the towns car parks were busy; particularly the Co-op/ Homebase car park (250 spaces) and Crecent Road car park (142 spaces).
- 3.40** Bus services penetrate into the centre, with stops available on Hamilton Road and Orwell Road.

Environmental Quality

- 3.41** The environmental quality of Felixstowe remains broadly as reported in our 2003 Retail Study, and the overall environment of the town remains relatively good.
- 3.42** In the main, the architectural characteristics of Felixstowe helps create an attractive centre. The streetscape – pavements, seating, planters etc. – are well maintained. There is little evidence of graffiti or flyposting (except towards the southern end of the town) and the streets were generally clean at the time of our visit. Provisions are made for disabled persons and street crossings are generally well located. Directional signage assists in making the town more legible. Possibly, more could actively occur in the green space at Hamilton Road and Cobbold Road, given that this public space lies in the very heart of the centre (albeit that this has received some investment in recent years). Likewise, the Great Eastern Square could be improved to create a more attractive public space, along with the cluster of small units associated with this space. Also, the environmental quality of buildings along St Andrews Road, Penfold Road and York Road (vacant units, storage areas, service yards) is poor.

- 3.43** As a rule, shoppers normally perceive a centre as more attractive when it offers a good quality environment. Therefore further environmental improvements to Felixstowe town centre would be welcome, especially those that create a greater sense of place.

Potential for the Centre to grow

- 3.44** A number of possible development opportunities are present in the town centre. These include land at High Road West and St Andrew's Road, and are detailed in Section 5. In the main these sites would require land assembly to occur, if the full potential of these sites is to be realised.
- 3.45** Opportunities to reuse vacant units and allow for extensions of existing premises would also provide scope to increase the retail offer. Amalgamation of existing smaller units may be better placed to match retailer requirements, should the opportunity arise.
- 3.46** As suggested in the previous study, the pedestrianisation (or at least the scope to reduce traffic flow) of Hamilton Road within the PSA could be considered, if it were felt that the retail environment could be enhanced by this initiative.

Felixstowe Out of Centre

Morrisons, Grange Farm Avenue

3.47 The former Sainsbury store, now operating as a large Morrisons is Felixstowe's main foodstore, located outside the town centre boundary on Grange Farm Avenue within the Cavendish Park District Centre. The store is located approximately 1.2 miles to the north-west of Felixstowe town centre in a residential area with good accessibility off the A14.

3.48 The store has a good food offer, including a bakery, delicatessen and cake shop. Non food accounts for approximately 15% of the stores floorspace, including a tobacconist and pharmacy, with a standard offer of toiletries, and household products, and a small element of DVDs, stationary, plants and flowers. The store is accompanied by a couple of small supporting shops as well as a petrol station. Our site visit suggests that the Morrison foodstore is trading at a reasonable level.

Lidl, Former Bus Station, Langer Road

3.49 An application for a new Lidl foodstore, providing 1,387 sq m net has been approved by Suffolk Coastal District Council at the former bus station site in Langer Road, in autumn 2008.

Summary

3.50 Overall, and in common with the position in 2003, Felixstowe operates as a relatively busy, vital and viable town centre, with an acceptable range of shopping facilities given the scale, status and function the centre is performing.

3.51 Felixstowe's composition of retail uses is broadly comparable to a typical UK centre. Even so, while there is a good representation of comparison retailers the town would benefit from more clothing/fashion shops (and ideally those of a mid to higher end). The lack of a department store is also a weakness, and more key attractor stores could serve to strengthen the town. This, together with any possibility to increase convenience provision would all help to claw back trade from Ipswich and out of centre locations.

3.52 Prime retail rents in Felixstowe remain weaker than the larger competing centres, however they have improved over recent years. In addition, vacancy rates have fallen and are well below the national average highlighting good demand for units. Both factors point towards a healthy centre. The relatively few vacant units in the centre does however stifle the potential of the centre to attract new retailers.

- 3.53** Environmental quality of a centre is becoming increasingly important for shoppers. Whilst Felixstowe has a fairly good environmental quality, there are some areas which could benefit from improvement, as well as the ongoing need to maintain and enhance the town centre generally.
- 3.54** As with all centres there is a need for Felixstowe to evolve and grow so it can remain competitive against centres such as Ipswich and out of centre shopping destinations. For Felixstowe, this could occur through opportunities to enhance and increase the retail stock, attracting other comparison led retailers and by continuing efforts to improve the environmental quality of the centre.

WOODBIDGE

- 3.55** Located just off the A12, Woodbridge is situated 14 km to the north of Ipswich. There have been few significant changes to the town centre since last reviewed in 2003. Woodbridge is a typical market town. Its attractive shopping environment, characterised by historic buildings, a variety of good architectural style set within a fine urban grain has resulted in Woodbridge becoming a popular tourist destination, as well as serving a wide rural catchment area.
- 3.56** The Woodbridge area has been designated as a conservation area. Within the town centre the main shopping provision is based upon its historic street pattern comprising the traditional linear high street of Thoroughfare and Church Street, leading up to Market Hill to the west of the town. The town also includes two small shopping centres; the Turban Shopping Centre, and Gobbitts Yard, both accessed from the Thoroughfare.

Diversity of Uses

- 3.57** The latest Experian GOAD Survey (May 2007) of Woodbridge town centre identified a total of 26,431 sq m gross of retail floorspace. When broken down into retail trade groups Experian highlights that approximately half of the retailers occupying Woodbridge town centre (53%) represent comparison outlets. Service provision represents a lower proportion of units at 30% of the total number of all outlets, while convenience only accounts for 7.6%. The unit vacancy rate is 8.7%.
- 3.58** CB Richard Ellis has updated the Experian GOAD Survey with our own centre survey for Woodbridge in July 2008. Our analysis identifies little change both in terms of the number of units and the retail composition in the town since 2007. The number of retail units has decreased marginally since 2007, although this appears to be a result of merging retail outlets, rather than units coming out of use entirely.
- 3.59** Table 3.7 highlights the current composition of Woodbridge, according to our 2008 survey and compared to the April 2001 data quoted in our previous study.

Table 3.7**Woodbridge Retail Composition by Retail Category and Number of Units, 2002 and 2008**

Retail Category	No. of Units	April 2001		No. of Units	July 2008	
		% of Total	% National Average (% Variance)		% of Total	% National Average (% Variance)
Convenience	17	10.24	9.44 (0.8)	14	8.28	9.08 (-0.8)
Comparison	91	54.82	48.34 (6.48)	91	53.85	45.14 (8.71)
Service	45	27.11	29.97 (-2.86)	49	28.99	30.30 (-1.31)
Vacant	11	6.63	10.70 (-4.07)	14	8.28	11.17 (-2.89)
Miscellaneous	2	1.20	1.55 (-0.35)	1	0.59	1.31 (-0.72)
Total	166	100	100	169	100	100

Source: Experian GOAD Town Centre Report, May 2007 adjusted by CB Richard Ellis Centre Survey, July 2008; Experian GOAD Town Centre Report, April 2001 cited in CB Hillier Parker 2003 [N.B. figures are not directly comparable due to categorisation listed in 2001 and 2007 surveys].

3.60 While Woodbridge's convenience representation has declined since last reviewed, the proportion of convenience goods shops is broadly in line with the national average, albeit slightly below. A more detailed breakdown of convenience provision however highlights that Woodbridge is not performing as strongly in most convenience categories as it was in when surveyed by GOAD in 2001, with only groceries and frozen foods representing an above average number of units. Potentially Woodbridge could benefit from a higher proportion of convenience stores to serve the local catchment area.

3.61 In terms of comparison goods retailers, the table highlights that, unchanged from April 2001, Woodbridge remains a strong comparison centre, with over half of all retailers providing a comparison offer, and well above the UK average of 8.71%. When breaking down the comparison goods offer it is evident that the 'furniture, carpets & textiles'; 'women's, girls and children's clothing' and 'books, arts/crafts, stationery' represent the highest proportion of goods on offer. This reflects the number of antique and specialist furniture shops in Woodbridge town centre which are targeted towards the tourism population and contribute to Woodbridge's attractive and fairly diverse shopping environment.

3.62 Service businesses represent 29% of all retail units within Woodbridge town centre, a slight increase from 2001, albeit remaining below the national average. The highest proportion of service units are occupied by hairdressers and beauty salon, building societies and estate agents. Woodbridge has a below average representation of restaurants, cafes and fast food outlets, travel agents, banks and financial services and launderettes and dry cleaners.

3.63 For the purposes of this Retail Study update we have used retail floorspace figures provided in the most recent Experian GOAD town centre survey, conducted in May 2007, and compared these with previous data provided by Suffolk Coastal District Council in their 2002 land use survey, as quoted in our previous study. As identified in Table 3.8 there is an approximate total ground floor floorspace of 26,432 sq m gross in 2007.

Table 3.8
Woodbridge Retail Composition by Retail Category and Floorspace, 2002 and 2007

Retail Category	April 2002		May 2007		
	Floorspace (sq m)	% of Total	Floorspace (sq m)	% of Total	% National Average (% Variance)
Convenience	2,443	11	2,230	8.44	16.69 (-8.25)
Comparison	8,759	38	14,930	56.49	51.00 (5.49)
Service	5,159	23	6,791	25.69	21.78 (3.91)
Vacant	1,029	4	2,397	9.07	9.41 (-0.34)
Miscellaneous	5,437	24	84	0.32	1.11 (0.79)
Total	22,827	100	26,432	100	100

Source: Experian GOAD Town Centre Report, May 2007; Suffolk Coastal District Council Land Use Survey, 2002 cited in CB Hillier Parker 2003. [N.B. figures are not directly comparable due to categorisation listed in 2002 and 2007 surveys].

3.64 In considering the breakdown of retail floorspace, a similar pattern to that highlighted by the number of units (Table 3.7) is evident. The key exception to this is that convenience stores are typically smaller than the UK average. Even so, there is a fairly diverse range of food goods on offer, reflecting that many of the traders are independent. This is an important strength for Woodbridge.

Retailer Representation

3.65 A multiple retailer is defined as being part of a network of nine or more outlets. The presence of multiple outlets can enhance the appeal of a centre. In May 2007, multiple retailers occupied 42 (24%) of the then total 172 retail units in Woodbridge. As with the situation when last reviewed, this figure is below the national average of 34%, and represents a relatively weak proportion of multiples. This reflects that Woodbridge's strength remains in its more diverse and independent sector, offering specialist antiques and furniture retailers, attracting tourists and contributing significantly to the town centre's vitality and viability.

3.66 Experian GOAD highlights 30 key attractors as a benchmark to judge centres against. While GOADs 2007 survey of Woodbridge indicated that the town centre includes three of these retailers, our own 2008 survey has adjusted this to two retailers due to the closure of Curry's in Thoroughfare. The remaining two attractors are Boots the Chemist and Woolworths. However, since the completion of the town's health check, Woolworths has ceased trading, creating a development opportunity in the town centre. Woodbridge does not have any key clothing/fashion attractors, major supermarkets or department stores (Table 3.9).

Table 3.9
Key Attractors in Woodbridge Town Centre

Multiple Retailer	No. in Felixstowe Town Centre	Mixed Goods Multiple Retailers	No. in Felixstowe Town Centre
Argos	0	New Look	0
BhS	0	Next	0
Boots The Chemist	1	River Island	0
Burton	0	Sainsbury's	0
Carphone Warehouse	0	Superdrug	0
Clarks	0	Tesco	0
Clintons	0	Topman	0
Currys	0	Topshop	0
Debenhams	0	Virgin Megastore	0
Dorothy Perkins	0	Vodafone	0
H & M	0	WHSmith	0
HMV	0	Waitrose	0
House of Fraser	0	Waterstones	0
John Lewis	0	Wilkinsons	0
Marks & Spencer	0	Woolworths	1

Source: Experian GOAD Town Centre Report, May 2007 adjusted by CB Richard Ellis On-Site Survey, July 2008

Note: Since the completion of the town's health check Woolworth's has ceased the trading of all its stores.

3.67 Woodbridge town centre is anchored by a Budgens foodstore, the largest retailer in the town centre, with a gross floorspace of 1,155 sq m (635 sq m net). The store is located within the PSA, in the Turban Shopping Centre, and provides a reasonable food range with six isles dedicated entirely to convenience goods. The store also includes a delicatessen and benefits from a 250 space public car parking to the rear, which was relatively full at the time of our site visit. A recent planning application (application reference C/07/1794) for the erection of an extension to the store was received by the Council and granted consent in April 2008. If implemented, this will enhance the food offer in the centre.

3.68 The pedestrianised Turban Shopping Centre provides a pleasant shopping environment with a number of specialist retailers including supplementary convenience provision to the Budgens foodstore with a butchers, greengrocers and fresh fish stall. Specialist comparison retailers include a bookshop, carpet

and flooring retailer and card and gift shop. A post office is also present. Also accessed from the PSA is the smaller Gobbitts Yard Shopping Centre. Retailers here occupy smaller units and offer a range of independent shops and services including a beauty salon, hairdressers, jewellery store, haberdashery, ladies ware and a café. One vacant unit was identified at the time of our site survey (July 2008).

3.69 The Primary Shopping Area (PSA) defined in the adopted local plan remains unchanged from our previous 2003 Retail Study. The frontages along Thoroughfare between Church Street and Elmhurst Walk, including Hamblin Walk continue to function as the PSA. Retailers here include, Boots the Chemist, Peacocks Clothing, as well as Lloyds TSB and HSBC. The Co-op foodstore is also located in the PSA. The foodstore, providing a gross floorspace of approximately 215 sq m (140 sq m net) supplements the main convenience Budgens foodstore. The store offers a modest range of convenience goods with two aisles, plus a delicatessen and CTN provision. It was relatively busy at the time of our survey.

3.70 To the west of the town centre, Church Street links Thoroughfare to Market Hill. This part of the town, outside the PSA is characterised by a number of estate agents, solicitors, travel agents and specialist antique retailers. Convenience and comparison goods retailers remain limited on Church Street as identified within in previous retail study.

3.71 Market Hill itself provides a very attractive public square with a relaxed feel for people to spend time and relax. Specialist retailers face in on each side, including antique dealers, independent ladies fashion shops, and hairdressers. There is also a public house offering outside seating, as well as a town hall, church and the Woodbridge museum.

3.72 Woodbridge town centre also provides a weekly market in the Hamblin Road car park and supplements retailer representation with a range of food and flower stalls.

Retailer Demand

3.73 Table 3.10 provides a detailed picture of the retail requirements for Woodbridge town centre drawn from the Focus Property Intelligent database. In total, the database identified nine requirements. While there are no requirements from convenience retailers, the eight requirements from comparison retailers indicates a strong demand from clothing stores, which would serve the local catchment area as well as enhance shopping for Woodbridge's tourist population. Argos has the largest requirement for the town centre and would provide Woodbridge with an additional key retailer. Only one requirement is from a service provider. In total, these operators require between 2,595 sq m and 5,081 sq m net floorspace, over double the requirement when last reviewed in our 2003 study. This demonstrates the continuing strength of the centre.

Table 3.10**Woodbridge Town Centre Requirements, 2008**

	Company	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
1	British Heart Foundation	Charity	Comparison	A1	60	557
2	Bonmarché	Clothing	Comparison	A1	232	325
3	Fat Face Ltd	Clothing	Comparison	A1	93	186
4	The Original Factory Store	Clothing	Comparison	A1	743	1394
5	Yours	Clothing	Comparison	A1	139	186
6	Edinburgh Woollen Mill	Clothing	Comparison	A1	139	279
7	Argos Limited	Variety	Comparison	A1	929	1486
8	Superdrug Stores PLC	Cosmetics	Comparison	A1	186	557
9	Essentials Hairdressing	Hairdressing	Service		74	111
Total Floorspace Requirement					2,595	5,081

Source: Focus – Focusnet UK, June 2008

3.74 Overall we consider this retail demand to be fairly strong for a market town of Woodbridge's size. In addition, given the nature of Woodbridge as a town known for independent retailers, it would be expected that further requirements would come forward from this sector.

Shopping Rents

3.75 While there is only limited data now available for shopping rents in Woodbridge, figures from 2006 and 2007 indicated that rents in the town centre have almost doubled in this time. Prime retail rental values rose from £3.25 per sq m Zone A in November 2006 to £5.57 per sq m Zone A in November 2007.

3.76 Table 3.11 compared rents in Woodbridge with competing centres also in the east of England. While Woodbridge represents the weakest rental values, it is the only centre where shopping rent did increase in this period, showing a remarkable improvement while all the competing centres remained stagnant. However, given the short time period over which this has occurred care should be taken in interpreting where figures has increased might be due to a single, one off deal which is not representative of the current market.

Table 3.11**Woodbridge's Prime Zone A Rents and competing centres (£ per sq m)**

	November 2006	November 2007
Woodbridge	3.25	5.57
Norwich	20.40	20.40
Ipswich	14.70	14.70
Lowestoft	6.70	6.70

Source: CB Richard Ellis Research, July 2008

Vacant Retail Property

3.77 The proportion of vacant street level property is a key indicator which can be used when assessing the vitality and viability of a town centre. It should however be used with caution, as vacancy can arise even in the strongest town centres, particularly where properties are under alteration. Table 3.12 indicates that according to the Experian Goad Survey (May 2007) there were 15 vacant units in Woodbridge, equating to a floorspace of approximately 2,397 sq m. The number of units is higher than in 2001 when there were 11 vacancies recorded by Experian GOAD. The proportion of vacant outlets equates to a vacancy rate of 9.07% of total floorspace in the town centre, which is just below the national average of 9.41%. This particular vitality indicator suggests Woodbridge is a fairly healthy centre, however does experience some difficulty in retaining retailers.

Table 3.12**Vacant Units, Woodbridge, May 2007 – by Unit and Floorspace**

Vacant units	Percentage of Total Units	National Average (%)	Sq m	% of total Floorspace	National Average (%)
15	8.27	11.17	2,397	9.07	9.41

Source: Experian GOAD Town Centre Report, May 2007

3.78 CB Richard's Ellis's own on site survey indicates that while the number of vacancies in Woodbridge has fallen to 14.

3.79 Woodbridge's vacant units are generally scattered within the town centre, with no appearance of clustering. However there are some vacancies within the PSA, including the former Curry's electrical store at 4 Thoroughfare and a medium sized unit just east of the entrance to the Turban Shopping Centre.

Pedestrian Flows

3.80 Observations from our on site survey of Woodbridge in July 2008 revealed that the highest levels of pedestrian movement are within the PSA along Thoroughfare, particularly outside the Budgens foodstore and Hamblin Walk. However not all of the PSA was busy. At the time of our visit the western end of

Thoroughfare was very quiet, with few pedestrians within the Gobbitts Yard, indicating its poor attraction of this shopping destination despite its location. Along Church Street, pedestrian flows were even weaker, which is perhaps unsurprising given the nature of retail in this part of town and the fact that shops here are largely mixed in with residential uses. While more pedestrians were present within Market Hill, the area in general is characterised by low footfall levels.

Accessibility

- 3.81** Woodbridge's accessibility remains unchanged from our 2003 assessment. The main vehicular access is via the A12, which also links the town with Ipswich, Colchester, Chelmsford and central London to the south east, and Saxmundham and beyond to Lowestoft, Great Yarmouth and Norwich to the north.
- 3.82** In terms of public transport, Woodbridge provides good bus services to a number of destinations in the district including Ipswich, Aldeburgh, Leiston, Saxmundham, Framlingham, Diss and Bawdsey. However, within the town centre bus departure and arrival points in Woodbridge are limited due to the historic narrow streets which do not have the capacity for buses.
- 3.83** Woodbridge is also accessible via train, with a train station located to the south of the town centre boundary, a relatively short distance from the PSA.
- 3.84** While the relatively good access of the A12 and proximity of the train station to the centre enhances accessibility, car parking provision is perhaps more restricted than ideally desired. This is primarily a consequence of the fine urban grain of the centre.

Environmental Quality

- 3.85** Much of the environmental quality of Woodbridge is as reported in our 2003 Retail Study, and the overall environment of the town is very good.
- 3.86** In the main, the town has a strong architectural and historic character which remains protected with its Conservation Area designation and ensures Woodbridge is one of the more attractive centres within Suffolk.
- 3.87** The town centre provides a pleasant and attractive shopping environment, with in the main attractive shop fronts and clean streets. Paving throughout the town is in good condition; however its narrowness in places, particularly along the non-pedestrianised Church Street can make pedestrian movement more arduous. It should however be recognised that this, in part, adds to the sense of place.

Summary

3.88 Overall, and as previously reported, Woodbridge operates as an attractive, vital and viable market town, and an important tourist centre.

3.89 Woodbridge could benefit from an additional convenience retailer to provide variety to supplement the main Budgens foodstore and Co-op (although the shortcomings may be overcome if the store extension is implemented). The relatively limited provision of mainstream comparison retailers allows instead for a good range of independent and specialist retailers contributing to a unique town centre. However, the local shopping population is likely to choose to travel to Ipswich for their main comparison goods shopping and therefore Woodbridge should seek to continue to differentiate its offer from this competing centre.

ALDEBURGH

3.90 Aldeburgh is located on the east coast to the north of Woodbridge and Felixstowe and south of Framlingham, Saxmundham and Leiston. The closest centre to Aldeburgh is Leiston. The town centre is located a short distance from the main road network and is accessed via the A1094 leading from the A12. Aldeburgh is a small attractive coastal town located entirely within the Heritage Coast and an Area of Outstanding Natural Beauty. The town centre also lies entirely within a designated Conservation Area. Aldeburgh is an important tourist centre within the district. The High Street itself runs parallel to the beach, and is easily accessed from the centre.

3.91 No up to date Experian GOAD survey is available for Aldeburgh. The last survey was conducted in June 2005 when a total of 6,030 sq m gross of retail floorspace was identified. Table 3.13 records the retail composition by floorspace identified by this 2005 survey.

Table 3.13

Aldeburgh Retail composition by floorspace, June 2005

Retail Category	Floorspace sq m Gross	% of Total
Convenience	567	9.4
Comparison	3335	55.3
Service	1691	28
Vacant	0	0
Miscellaneous	437	7.2
Total	6,030	100

Source: Experian GOAD Town Centre Report, June 2005

3.92 Since 2005, Aldeburgh town centre has undergone some changes. The most significant of these changes includes the addition of some new retail units along the High Street. The overall total number of retail units is currently 73 outlets, compared to 69 in 2005 (Table 3.14). Other retail units at 85 High Street, including a flower shop and clothing outlet are currently being redeveloped for a mixed use retail and residential block. Table 3.14 highlights the current retail provision in Aldeburgh according to CB Richard Ellis's centre survey.

Table 3.14**Aldeburgh Retail composition by number of units, July 2008**

Retail Category	2008 Outlet Number (2005 Outlet number)	% of Total	% National Average (2008 % Variance)
Convenience	8 (8)	11	9.08 (1.92)
Comparison	41 (38)	56	45.14 (10.86)
Service	21 (21)	28.8	30.30 (-1.5)
Vacant	1 (0)	1.34	11.17 (-9.83)
Miscellaneous	2 (1)	2.74	1.31 (1.43)
Total	73 (69)	100	100

Source: CB Richard Ellis Centre Survey, July 2008; 2005 Experian GOAD Outlet numbers

3.93 Table 3.14 indicates that since 2005 Aldeburgh has experienced little change in the overall retail composition of the town centre. The key difference is a rise in the number of comparison goods retailers.

3.94 There are eight convenience retailers that operate in Aldeburgh town centre, representing 11% of the total retail provision – an above average proportion. In terms of convenience retailers, Aldeburgh is anchored by a Co-op foodstore which represents its only mainstream convenience retailer (this store was not identified in Experian GOADs 2005 survey Map). The small store provides retail floorspace of 336 sq m (220 sq m net), and offers a fairly limited food range, with half an aisle allocated to non-food toiletries and cleaning products, and some limited household goods. The remaining convenience provision in Aldeburgh is dominated by a number of specialist retailers, including a newsagent, three off licenses, a butcher, a baker and a delicatessen. The operators of these stores are predominantly local independent retailers, such as Smiths bakery and Salters butchers. The convenience offer is reasonable given the rise of the centre.

3.95 The 41 comparison units, occupying over half of the town's retail outlets provide a range of furniture and antique stores, galleries, bookshops, gift and card shops and clothing retailers, targeted largely towards the tourist market. The comparison provision is well above the UK national average. The town centre includes no key retail attractors, and is characterised largely by independent retailers.

3.96 The service sector occupies nearly 30% of the retail units in the town centre; similar to the UK average. The majority of provision is taken up by restaurants

(typically higher quality) tea rooms and cafes again reflecting the strong tourism trade. There are very few fast food and take away outlets in Aldeburgh. There are also hairdressers, banks, estate agents and solicitors to protect and serve the local population.

3.97 Aldeburgh also includes a number of non-retail uses which contribute to the town's viability and vitality, in particular the cinema. As expected there is also a range of hotels and other visitor accommodation.

3.98 In terms of the vacancy rate, the GOAD 2005 town centre survey identified no retail vacancies. CB Richard Ellis's own update has now identified one vacancy of a former hairdressers. Such a low vacancy rate indicates that Aldeburgh has little problem in attracting retailers (and is significantly lower than recorded in 2002 when 7 units were vacant).

3.99 For a small town Aldeburgh has a healthy demand from retailers. Table 3.15 provides a detailed picture of the retail requirements for Aldeburgh town centre drawn from the Focus Property Intelligent database. In total, the database identified five requirements. The majority of demand comes from clothing goods retailers, including Billabong. All of these operators are in part seeking to benefit from the tourism trade. Costa Coffee represents the only service sector demand. In total these operators require between 455 sq m and 1,004 sq m net.

Table 3.15

Aldeburgh Town Centre Requirements, 2008

	Company	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
1	Julian Graves	Health food shop	Convenience	A1	46	111
2	Cotton Traders	Clothing	Comparison	A1	93	149
3	Billabong	Clothing	Comparison	A1	130	465
4	Trespass	Clothing	Comparison	A1	93	186
5	Costa Coffee	Coffee Shop	Service	A1	93	93
Total Floorspace Requirement					455	1,004

Source: Focus – Focusnet UK, June 2008

3.100 Overall we consider this retail demand to be fairly strong for a small town centre of Aldeburgh's size. In addition, it would be expected that requirements would also come more from independent businesses. Interest from multiple retailers such as Billabong and Costa Coffee suggests a healthy town centre. It should however be recognised that there is little available space to accommodate new retailers in the centre.

- 3.101** Our review of pedestrian movements in Aldeburgh highlights that, unchanged from our 2003 study, the busiest stretch of the High street continues to be outside the Co-op foodstore and post office. The northern and southern fringes of the town experienced fewer pedestrians due to their peripheral locations.
- 3.102** Aldeburgh offers reasonable accessibility. The trunk road network lies several kilometres to the north. Aldeburgh is not linked to the rail network but local bus routes connect the town centre to Ipswich, Woodbridge, Leiston and Saxmundham.
- 3.103** There are approximately 300 parking spaces in designated car parks in Aldeburgh centre. Free, short stay, on street parking along the length of the High Street supplements this provision and allows it for more convenient shopping. Public car parks, particularly off the High Street and Crabbe Street, were at the time of our visit.
- 3.104** Aldeburgh is an historic coastal town characterised by buildings and shop frontages that are maintained to a high standard. They are attractive and clean, and frontages and signage are appropriate for an historic town. The streets and pavements are wide, well maintained and clean. Street furniture and signage is consistent and attractive, and there is no evidence of vandalism or flyposting.

Summary

- 3.105** Overall, Aldeburgh continues to be a healthy centre. Much of its strength is derived from the strong tourism trade, and arguably the retail offer is more geared toward this rather than the local population. Demand for premises is good, although there is little space available to accommodate new retailers, and arguably the range of food goods available in the town centre could be improved. The centre benefits further from its attractive architecture and seaside setting.

SAXMUNDHAM

3.106 Saxmundham is located off the A12. Woodbridge, Framlingham, Leiston and Aldeburgh, are all within relatively close proximity. The centre is primarily laid out along a traditional linear High Street.

3.107 CB Richard Ellis conducted a centre survey of the town in July 2008. The survey identifies a total of 62 retail units, a breakdown of which is shown in Table 3.16, along with comparison 2002 outlet numbers. Unlike other centres visited, GOAD plans are not available for Saxmundham. We have therefore relied on the last published information which was contained within our 2003 Assessment. As Table 3.16 illustrates there has been little change. However, due to interpretation of classification the number of miscellaneous uses has significantly reduced since 2002.

3.108 It should be noted however that data from 2002 was extracted from Suffolk Coastal District Council's own data, which use varying retail classifications. As such, while this data can provide a comparison with our own survey which follows Experian GOAD classifications, it is not a true like for like comparison. This is most notable for miscellaneous units, which are recorded at an unrealistic increase in 2002 than they actually are in 2008.

Table 3.16

Saxmundham Retail composition by number of units, July 2008

Retail Category	2008 Outlet Number (2002 Outlet Number)	% of Total	% National Average (% Variance)
Convenience	7 (8)	11.3	9.08 (2.22)
Comparison	27 (25)	43.5	45.14 (-1.64)
Service	21 (22)	33.9	30.30 (3.6)
Vacant	5 (8)	8	11.17 (-3.17)
Miscellaneous	2	3.2	1.31 (1.89)
Total	62 (63)	100	100

Source: CB Richard Ellis Centre Survey, July 2008, 2002 Suffolk Coastal District Council Outlets Numbers, March 2002

3.109 There are seven convenience units that operate in Saxmundham town centre. While the number of convenience units is above the national average (2.22%), and represents 11.3% of the total retail provision in the town, there is only one principle foodstore. Saxmundham is currently anchored by Somerfield, which is

the town's primary food retailer. The store has a gross floorspace of approximately 1,321 sq m (743 sq m net), and offers a good food range displayed on 11 aisles with separate rotisserie and delicatessen. Additional in-store provision includes home delivery, a tobacconist, florist and in-store ATM. Following the take over of Somerfield by Co-op however in mid 2008, we are aware that the Somerfield is now to become a Waitrose. As such it is reasonable to assume that a Waitrose unit will turnover at a higher level than the former Somerfield, therefore potentially reducing the available convenience capacity in the centre. The remainder of convenience provision in Saxmundham derives from independent retailers, including 'Jackson's Bakery'; 'The bistro and Deli'; and 'Stannard & Sons Butchers'. The weekly market in Market Place also has a number of stalls including a fish van and fruit and vegetable products.

3.110 The majority of retail units (43.5%) are occupied by comparison goods retailers. These are largely independent specialist retailers including a second-hand book shop, pet shop, a jewellery and gift shop among others. A Co-op pharmacy store is also located on the High Street. The weekly market in Market Place sells a range of non-food goods including cards and stationery, cleaning products and clothing. The depth and range of comparison goods products on offer is however limited and highlights the town centre's more local shopping function.

3.111 34% of units in Saxmundham are occupied by service businesses (21 units), representing a provision 3.6% above the national average. They include hairdressers, a beauty salon, estate agents, a building societies/banks, restaurants, cafes and take-aways. While service businesses are spread out through out the town centre, there is a small cluster in Market place with six service outlets. Although a reasonable service sector provision is expected, operators do not particularly enhance the vibrancy of the centre.

3.112 Saxmundham has five vacant units, equating to 8% of all outlets, approximately 3.2% below the UK national average. Four vacant units are located in the High Street and one in Market Place. Apart from two adjacent units on the High Street the remaining vacancies are relatively spread out through the town centre. The level of vacancies has reduced since 2002.

3.113 Saxmundham has one retail requirement from Marstons Plc – a public house - requiring between 2,023 sq m and 2,183 sq m net of floorspace. Demand for premises is weak.

3.114 Observations from our centre survey revealed that Saxmundham has weak pedestrian flows. The highest pedestrian movements were observed in the centre of the High Street and at the entrance to Somerfield, however the town was generally quiet in all areas. Arguably, there is little to draw pedestrians along the High Street.

3.115 The two main town centre car parks are at Church Street (147 spaces) adjacent to Somerfield and on Market Place (82 spaces). The Church Street car park is

located to the south east of the town centre adjacent to Somerfield, the principal town centre foodstore (soon to become a Waitrose). Market Place car park adjacent to the train station is accessed via Market Place leading from the main High Street. Both car parks were reasonably busy at the time of our visit. On-street parking throughout the town centre is however restricted, and this does not benefit traders along the High Street.

3.116 Saxmundham is easily accessible by road, rail and bus routes. The town centre is located just off the A12 primary road network Saxmundham train station is located on Station Approach on the East Suffolk line between Ipswich and Lowestoft. The station is a short walk from the main retail frontages. The rail service also links Saxmundham directly with Norwich and to more local destinations including Halesworth, Woodbridge and Melton (although services are fairly infrequent).

3.117 Pedestrian crossing points assist shopper movements and linkages between retail units, but the High Street remains a significant barrier to movement.

3.118 Saxmundham is served by local bus routes that link with a number of local destinations including Aldeburgh, Leiston, Melton, Woodbridge and Wickham Market. These bus services also connect the town centre with the Tesco superstore at Martlesham Heath, and Ipswich town centre.

3.119 Saxmundham market town has a reasonably attractive built environment although parts – such as the post office – are less appealing. The A12 diverts traffic outside the town centre ensuring less traffic movement within the town centre, particularly on the High Street. The town centre is designated a Conservation Area. Buildings are maintained to a relatively high standard although there are some signs of dilapidation and need for investment.

Summary

3.120 The vitality and viability of Saxmundham is reasonable. There are some considerable weaknesses, including the fragmentation of the retail offer by non retail uses and the upkeep of shop fronts especially in Market Place. Although the food offer is acceptable, the range of comparison goods is much more limited. Low footfall levels detract from the vibrancy of the centre, and possibly more could be done to enhance the environmental quality of the area in certain areas. These weaknesses are in part reflected by a low level demand for units and a number of vacant units present on the High Street. Potentially, and reflecting the localised role the centre performs, encouraging a more compact centre, underpinned by a food offer which is more convenient to use (such as more on street parking) may serve to strengthen the town.

LEISTON

3.121 Leiston is reasonably compact town centre serving a local population. The main shopping provision in Leiston is laid out in a 'T' shape and located on High Street and Sizewell Road.

3.122 The last survey was conducted by Experian GOAD in June 2005 when a total of 8,017 sq m gross of floorspace was identified. Table 3.17 records the retail composition identified by this 2005 survey.

Table 3.17

Leiston Retail composition by floorspace, June 2005

Retail Category	Floorspace sq m Gross	% of Total
Convenience	1,217	15.2
Comparison	4,905	61.2
Service	1,691	21.1
Vacant	204	2.5
Miscellaneous	0	0
Total	8017	100

Source: Experian GOAD Town Centre Report, June 2005

3.123 While there have been some changes in the retail occupiers within Leiston town centre since 2005, CB Richard Ellis's centre survey in 2008 indicates that the overall retail composition remains relatively the same with two additional outlets (Table 3.18). In terms of the number of retail outlets overall the number of vacant units remained the same, while there was a slight reduction in the number of comparison units and convenience and service businesses both increased by two.

Table 3.18**Leiston Retail composition by number of units, July 2008**

Retail Category	2008 Outlet Number (2005 Outlet Number)	% of Total	% National Average (% Variance)
Convenience	10 (8)	16.1	9.08 (7.02)
Comparison	29 (31)	46.8	45.14 (1.66)
Service	21 (19)	33.9	30.30 (3.6)
Vacant	2 (2)	3.2	11.17 (-7.97)
Miscellaneous	0 (0)	0	1.31 (-1.31)
Total	62 (60)	100	100

Source: CB Richard Ellis Centre Survey, July 2008; 2005 Experian GOAD Outlet numbers

3.124 Convenience goods retailers occupy 16% of all units in Leiston, a provision 7% above the UK national average. The provision includes two general convenience retailers, the Solar Co-op foodstore, which anchors the centre and a Londis store, (incorporating a post office and newsagent). Eight small specialist retailers supplement this convenience provision, including two butchers, bakers, two newsagents, a health food shop and two greengrocers. Overall, the range of foodstores is good.

3.125 The Solar Co-op is the principal convenience store in Leiston, located on Sizewell Road. The store opened in 1987 and has a gross retail floorspace of approximately 1,341 sq m. It has a good food range including a hot food counter and delicatessen. Additional facilities include a, tobacconist, coffee shop and ATM. A large part of these variety stores is given over to non-food goods, as described below.

3.126 Approximately half of Leiston's retail offer derives from comparison goods, occupying 48.9% of all the units in the centre; a provision 3.16% above the UK national average. There is an adequate range of provision including opticians, a pet shop, ladies clothing, florist, hardware stores, and tool centre. The Co-op store, provides a wide range of non-food products on two levels. The ground floor is allocated for household electrical goods. Clothing, bedding and curtains are located on the upper floor. Overall, the comparison goods provision is good given the size of the centre. Leiston has a more limited range of specialist retailers found in the other centres surveyed reflecting less reliance on tourism.

3.127 Service businesses occupy 34% of all units in Leiston. A large number of these occupiers are A5 uses (take-aways) although there are also banks/buildings societies, estate agents, hairdressers, a beauty salon, café and a Jobcentre.

3.128 Leiston has two vacant units, almost 8% below the UK national average. Both vacant units are located in the northern end of the High Street. The previous Retail Study highlighted 11 vacancies in 2002; it is therefore evident that Leiston has dramatically improved in attracting new retailers to the town centre.

3.129 Leiston town centre also includes non-retail uses which enhances the centre, these include public houses, a wine bar and the town cinema.

3.130 In terms of pedestrian movements, observations highlighted that the highest pedestrian counts were outside the Solar Co-op foodstore on Sizewell Road. The store has a large influence on this high pedestrian count acting as Leiston's dominant anchor retailer. Pedestrian movements were much lower along the High Street, particularly to the far northern end outside Barclays Bank on Main Street, and at the far southern end outside the Black Horse public house and the cinema both located on High Street.

3.131 Leiston has relatively good access by road and bus, public services but not railway station. The closest railway station is in Saxmundham, approximately 4 miles to the west. 'B' roads link Leiston with the A12 to the west, and Aldeburgh to the south, and local bus routes connect Leiston town centre with a number of local destinations including Aldeburgh, Saxmundham, Woodbridge, Tesco superstore at Martlesham Heath, and Ipswich town centre. There are two local authority car parks in Leiston with a total of 120 parking spaces, and further car parking to the rear of Co-op Solar. While the Co-op car park was relatively busy, most other car parking provision in the town was less soon the day of our site visit.

3.132 In terms of environmental quality, Leiston is less attractive in character than the other centres assessed in the district. Buildings and shop frontages are inconsistent in style and there are some signs of dilapidation and lack of investment. The consolidation of shop frontages are prevented by a number of non-retail uses and High Street and Sizewell Road are relatively busy traffic through routes.

3.133 Pavements are in places uneven and narrow whilst street furniture and signage is limited; the boarded up vacant units suffer from vandalism and graffiti. There is evidence of investment in traffic calming measures and re-surfacing.

Summary

3.134 Overall, while the diversity of uses identifies a good mix of food and non food provision, and below average vacancy rate, the town can only be considered to

be performing reasonably. This is indicated by the low pedestrian movements along the High Street, resulting from the fragmented nature of the town centre retail offer. Unlike the other three smaller centres, Leiston also does not benefit from a strong tourist trade. A large number of retail units were closed at the time of our visit which detracts from the daytime vibrancy of the centre. The shopping environment is poor in places with some signs of dilapidation and lack of investment. Potentially, improvements to the public realm would enhance the centre considerably. It should however be recognised that the reduction in the number of vacant units since our last survey indicates that the retailing fortunes of Leiston have improved somewhat in recent years.

FRAMLINGHAM

3.135 Framlingham is a relatively isolated centre, located approximately 6 miles to the west of Saxmundham town centre on the minor 'B' road network. It is an attractive historic market town located on the upper reaches of the River Ore in a largely agricultural area. The attraction and importance of the Castle, school and extensive water meadows around the Mere, have led to the designation of the town centre and wider area as a Conservation Area. The town centre functions as a major local shopping centre and performs a complementary tourist role.

3.136 The main shopping provision in Framlingham is located on Market Hill, Bridge Street and Church Street. This is supplemented with additional shopping frontages along Albott Place and Well Close Square.

3.137 The last Experian GOAD survey for Framlingham was conducted in June 2005 when a total of 6,792 sq m gross retail floorspace was identified. Table 3.19 records the retail composition identified by this 2005 survey.

Table 3.19

Framlingham Retail composition by floorspace, June 2005

Retail Category	Floorspace sq m Gross	% of Total
Convenience	2,166	31.9
Comparison	2,638	38.8
Service	1,877	27.6
Vacant	0	0
Miscellaneous	111	1.6
Total	6,792	100

Source: Experian GOAD Town Centre Report, June 2005

3.138 As with the other town centres reviewed, Framlingham has experienced some changes since last surveyed by GOAD. CB Richard Ellis's June 2008 centre survey indicates that there are a total of 58 retail units in the town centre (Table 3.20). In terms of the retail composition, convenience retailers represent 8.6% of all retail units and is broadly in line with the UK national average. The proportion of comparison units is 44.8% of the retail provision, while the representation of service businesses has remained approximately the same.

Table 3.20**Framlingham Retail composition by number of units, July 2008**

Retail Category	Outlet Number	% of Total	% National Average (% Variance)
Convenience	5	8.6	9.08 (-0.48)
Comparison	27	46.5	45.14 (1.36)
Service	23	39.6	30.30 (9.3)
Vacant	2	3.4	11.17 (7..77)
Miscellaneous	1	1.7	1.31 (0.39)
Total	58	100	100

Source: CB Richard Ellis Centre Survey, July 2008

3.139 Framlingham has the lowest proportion of convenience goods retailers in comparison to the other centres surveyed, occupying only 8.6% of all units, slightly below the UK average. The five convenience goods retail units provide a limited range of specialist retailers. In addition to the Co-op foodstore, a greengrocer, delicatessen, bakery, and newsagent are present. The Co-op supermarket somewhat compensates for this limited number of convenience goods retailers.

3.140 The Co-op Solar supermarket is the principal food retailer in the town centre, with a gross retail floorspace figure of approximately 1,408 sq m. There are 8 customer check outs and 7 aisles. There is a good range of food products, including a delicatessen and hot food counter, CTN and a small range of non-food products including electrical and domestic appliances.

3.141 The 26 comparison goods retailers in Framlingham town centre occupy approximately 47% of all the units in the centre; just above the UK national average. Some retailers are targeting the tourist market with a range of antique shops, booksellers and gift shops. There is, however, a range of retailers performing a more local shopping function, such as a chemist, optician and pet shop. Operators are almost entirely local and independent retailers.

3.142 Service retailers occupy approximately 40% of all units in Framlingham, including restaurants, hairdressers, dry cleaners, travel agents, banks and estate agents.

3.143 Framlingham has only 2 vacant units, a reduction since our previous Retail Study. Vacancies comprise 3.4% of all units, well below the UK average. This particular vitality indicator suggests a healthy centre. The vacant units are in the western quarter of the town centre – a more secondary area. Overall, the low

vacancy rate suggests that Framlingham experiences few problems in retaining and attracting new retailers.

3.144 Observations from our survey of Framlingham indicate that the highest flows of pedestrians were witnessed within Market Square, where the main concentration of retailing in Framlingham is located. Relatively high pedestrian activity was also evident at the entrance to the Co-op Solar. Outside this area, pedestrian movements were very low.

3.145 Framlingham can be accessed by road and bus. It is served by 'B' roads linking to the wider road network. The town centre is located on the minor 'B' road network, a short distance from the A1120, a direct route to Stowmarket in the west. The A12 trunk route is accessed approximately 6 miles eastwards on the B1119, in the direction of Saxmundham and Leiston. Bus route links with a number of destinations including Diss, Wickham Market, Melton, Woodbridge and Ipswich.

3.146 The town centre has two main car parks. The Elms is located to the north west of the town centre. The adopted Local Plan (Policy AP139) allocates an area of land adjacent to this car park for an extension to create an additional 70 parking spaces. Fore Street car park is located to the south of the town centre. The main shop frontages are accessed from this car park via a pedestrian alley leading from Fore Street (opposite the car park entrance) to Market Place adjacent to the Old Mews. Additional car parking is available in Market Place and a dedicated Co-op Solar car park (76 spaces) accessed via Riverside. On inspection on our site visit, all available car parks area were reasonably busy.

3.147 In terms of environmental quality Framlingham's central area, together with the castle, school and extensive water meadows around the Mere, has been designated as a Conservation Area. The good quality built character and attractiveness of the town centre enables Framlingham to remain an important tourist centre in Suffolk Coastal District.

3.148 Buildings and frontages are well maintained and retain many of their attractive original features. Signage and shop fascias are appropriate and consistent with the scale and design of the built environment. Investment in paving and streets is evident. The maintenance of street furniture and planting around Market Hill adds to the attractiveness of this central area. There are opportunities to extend such projects and further enhance Market Hill. Although the car park on Market Hill is well used, traffic flow is low and the central area appears to be a safe pedestrian environment.

Summary

3.149 In summary we consider Framlingham continues to be a vital and viable town centre. The Co-op Solar provides a fairly good range of food products, compensating for the relatively weak provision of smaller, independent food retailers. Comparison retailers provide for the strong tourist market and to an extent local shopping requirements. We consider shopping provision in Framlingham to be relatively balanced. Vacancy rates are low and the highest pedestrian movements are located on Market Place, where the main concentration of retailing is present. In addition, the town centre offers an attractive, historic and characteristic environment.

IPSWICH EASTERN FRINGE

3.150 Ipswich is the largest centre in Suffolk and the hub of an extensive sub-region. It functions as a regional centre in employment, commercial, recreational and cultural terms. Parts of the built-up area of Ipswich extend into the Suffolk Coastal District, and substantial housing areas are developing at Grange Farm, Kesgrave, Bixley Farm and Warren Heath.

3.151 While we did not as part of this assessment visit these stores, following discussions with officers we have updated where appropriate. In terms of retailing, the Ipswich Eastern Fringe has a significant influence on trading patterns in Suffolk Coastal District. The full extent of these shopping patterns and trade flows are outlined in detail in Section 4, as part of our retail capacity modelling. This section provides a qualitative assessment of current food and non-food retailing in the Ipswich Eastern Fringe.

Tesco, Kesgrave

3.152 This store is located in Kesgrave District Centre, Grange Farm, Ropes Drive West. It opened in November 1994 and is the smallest supermarket in the Ipswich Eastern Fringe with a gross floorspace figure of approximately 1,461 sq m (854 sq m net). The store is accessed from 'Main Road' (A1214) and serves the local residential population.

3.153 A planning application was submitted in July 2002 to extend the store, increasing the net sales area by 541 sq m. However after remaining undetermined, Tesco withdrew their application in early 2006.

Tesco Extra, Martlesham Heath

3.154 The Tesco Superstore at Martlesham Heath is located approximately 5-6 miles from Ipswich town centre. There is good accessibility to the main road network being located just off the A12 Ipswich Eastern By-Pass. The store opened in 1994 and has a gross floorspace figure of approximately 5,577 sq m (3,620 sq m net), the largest foodstore in the Ipswich Eastern Fringe. It provides a modern, fully conforming 24hour superstore shopping environment.

3.155 It has a comprehensive food offer including a delicatessen, butcher, fishmonger, cheese counter and bakery. Approximately one-third of the store is dedicated to comparison goods, offering a wide range of electrical item, clothing and household goods. Additional facilities include a café, customer toilets, pharmacy, photo development service, tobacconist and cash machines. Adjacent uses include a 24 hour petrol filling station and store dedicated car park.

- 3.156** A planning application, submitted in June 2002 to extend the existing store by approximately 2,399 sq m gross (1,562 sq m net), was approved in April 2005. A full planning consent on land adjacent to the Tesco site was also granted for non-food retail in April 2008.

Sainsbury's and Homebase, Warren Heath

- 3.157** The Sainsbury's store at Warren Heath is located on the A1156 Felixstowe Road, within close proximity of Junction 57 of the A14. The Homebase DIY store is located adjacent to the foodstore, and the Euro Retail Park is located opposite. Homebase has good range of DIY and hardware products and garden furniture and equipment. There is an adjacent Homebase garden centre.

- 3.158** Sainsbury's opened in 1985 and has a gross floorspace figure of approximately 7,700 sq m (4,580 sq m net). The store provides a comprehensive food offer including a butcher, fishmonger, delicatessen and bakery. Additional facilities include a tobacconist, ATM's, magazine/stationery shop. There is no condition on the existing store restricting the amount of non-food floorspace and there is subsequently a good range of non-food products, more extensive than the Tesco at Martlesham Heath. Products include kitchenware, electrical goods, music equipment, CD's and DVD's. There are also areas allocated for the Adam's children's clothing range and The Early Learning Centre. The store has an adjacent car park, petrol filling station and recycling facilities.

- 3.159** A planning application was submitted in September 2002 to extend the store by 1,664 sq m gross (1,357 sq m net). Planning consent was granted in October 2007 for the erection of a single-storey extension to existing A1 retail store; new entrance lobby, amendments to car park, servicing layout, formation of new access to Felixstowe Road; and new retaining wall to service area relocation of bus stop and associated works.

Beardmore Retail Park, Martlesham Heath

- 3.160** The Beardmore Retail Park, Martlesham Heath is sometimes referred to as the 'East Ipswich Retail Park'. It is located opposite the Tesco Superstore within a mixed commercial area close to the BTextact Technologies research establishment at Martlesham Heath. The retail park is accessed via the Ipswich Eastern By-Pass (A12), benefiting from excellent access to the main road network. It opened in 1995 and has a gross floorspace figure of 9,104 sq m. It includes 7 warehouses occupied by Conway Pine Furniture, Topps Tiles, Glasswells World of Furniture, Seapets, Lings Garden Store, Focus, and Bennetts.

Euro Retail Park

3.161 The Euro Retail Park is located some two miles to the south-east of Ipswich town centre within Ipswich Borough. It is accessed via Ransomes Way which links with Felixstowe Road to the north and Junction 57 of the A14 to the south. Sainsbury's and Homebase, Warren Heath are located immediately to the north of the Retail Park. It benefits from excellent accessibility to the main road network. It opened in June 1996 and has a gross floorspace of approximately 10,577 sq m. While the retail park is less than a mile from the A14 dual carriageway, it is not particularly prominent, being sited with Ipswich's largest industrial estate (Ransomes Europark). It does not have open A1 consent, although restrictions were lifted on one unit to allow the sale of sports goods.

3.162 A B&Q Warehouse of 9,290 sq m (100,000sq ft) is currently operational. The Retail Park comprises an 'L' shaped terrace of 8 units, predominantly occupied by furniture and furnishings retailers. Occupants include Allied Carpets, Carpetright, Harveys, Hughes Electrical, JJB Sports and MFI (however MFI is currently in administration). Two units are currently vacant, one of which is being refurbished.

4

QUANTITATIVE ASSESSMENT

4. QUANTITATIVE ASSESSMENT

4.1 In this section we examine the current performance of the town centres in the district in quantitative terms. We have assessed the towns of Felixstowe, Woodbridge, Aldeburgh, Saxmundham, Leiston, and Framlingham in terms of the convenience and comparison goods provision, both in centre and, where relevant, out of centre. We also assess convenience and comparison goods provision in the Ipswich Eastern Fringe and its influence on the District. This quantitative assessment forms a key input into our consideration of the need for further retail floorspace to the period 2025.

4.2 In order to carry out our quantitative assessment we have used a conventional and widely accepted step-by-step methodology. This draws upon the results of the previous Household Telephone Interview Survey, commissioned as part of our 2003 Retail Study. This enables us to model the existing flows of available expenditure to each town centre. Whilst this is now 5 years old we are not aware of any significant retail development which have come forward during this time that would alter the shopping patterns identified by the household survey. To summarise, we completed the following steps:

- Calculated the total amount of convenience and comparison goods expenditure which is available within the postcode areas comprising the Suffolk Coastal town centre catchment areas;
- Allocated the available expenditure to the convenience and comparison goods shops in each town centre, on the basis of the results of the Household Interview Survey of Shopping Patterns, so as to provide estimates of current sales and forecasts of future sales;
- Compared the total expenditure attracted to each town centre with existing retail floorspace, to assess sales densities in each shopping destination.

Estimates of Population in the Survey Area

4.3 Population estimates and forecasts for each of the survey Zones were prepared from the MapInfo system. This provides estimates of population in 2008, 2013, 2018, 2023 and 2025 (Table 1A, **APPENDIX 2**). Overall, the population of the survey area, based on Map Info alone, is currently 132,792 (Table 1A, **APPENDIX 2**).

4.4 However, 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. The additional population to be created by this housing has been calculated by applying an occupancy rate of 2 people per dwelling (as taken from Suffolk Coastal District Council's Private Sector Housing Renewal Strategy, August 2007).

- 4.5** This level of housing proposed includes outstanding planning permissions and 'urban potential' estimates from Suffolk Coastal District Council, which are taken from a base date of April 2008. It also includes the potential distribution of allocations as currently put forward by the District Council as a preferred strategy in its Local Development Framework Core Strategy. Outstanding planning permission figures have been discounted by 10% to account for development that may not materialise, and the estimated housing supply for 'small sites' is extrapolated from annual consents 2002-2007 but discounted in anticipation of reducing opportunities.
- 4.6** In total, an estimated 7,710 dwelling supply has been considered, creating a total additional population of 15,420. The Council's phasing and distribution of this supply (as shown in Table 2: Housing Supply 2008-2025 Proposed Distribution, **APPENDIX 4**), has been applied across the 10 zones and plan period, with all outstanding planning permissions and 'urban potential' supply being dropped in at 2008 only, and allocations being phased in from 2008-2018. 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).
- 4.7** Table 1 (**APPENDIX 2**) shows the total population forecasts for each of the survey zones, based on the MapInfo system and the additional population expected to be created by the level of housing estimated to come forward during the plan period. As such, the overall population is currently set at 142,812. This is forecast to rise to 149,217 by 2013, an increase of 4.5%. By 2018 the population is forecast to rise to 155,798; and to 159,854 in 2023; and again to 161,503 in 2025. Overall between 2008 and 2025 population will increase by 13%.

Tourist Expenditure

- 4.8** The district contains a number of historic centres which are attractive to tourists. Whilst we acknowledge that tourist expenditure will supplement local expenditure it is our preferred approach not to include this within our assessment for the following reasons. Firstly, tourism is extremely susceptible to the weather and the current economic climate. Secondly, tourist expenditure of food will be, to a large extent, predicated upon whether they are staying in self catered accommodation or hotels. Similarly, it is unlikely that expenditure will be spent upon bulky goods. Thirdly, monies spent by tourists will be off-set by residents going on holiday and spending monies elsewhere.

Available Expenditure in the Survey Area

- 4.9** MapInfo also provides an estimate of per capita expenditure for convenience and comparison goods in 2005. We have made deductions for Special Forms

of Trading which represent expenditure not available to spend in the shops, i.e. internet and catalogue shopping.

4.10 In terms of the expenditure growth in the district, we have drawn on the short term growth rate for convenience goods and the long term trend for comparison goods. As approach supplied by MapInfo. These indicate that more growth will take place on comparison goods as apposed to convenience goods; the scope to purchase more food is more limited than the scope to purchase more non-food goods. MapInfo estimate a convenience goods growth rate of 1% per annum and a comparison goods growth rate of 4.9% per annum.

4.11 A 4.9% growth rate may be regarded as conservative having regard to recent trends, although the effects of 'etailing' and possible slowdown in consumer spending suggest that this role remains appropriate for long term forecasting. The available convenience goods expenditure in the Suffolk Coastal Survey Area is currently £220m. It is forecast to increase by approximately 34% to reach £295m by 2025. The available expenditure on comparison goods in the same area is currently £442m and is expected to increase to 1,128m over the next 13 years.

Floorspace Data

4.12 The comparison and convenience goods floorspace data used in our modelling has been drawn from the previous CBRE assessment and updated where appropriate. Our floorspace assumptions for the foodstores include, where appropriate an adjustment to identify the proportion of purely convenience goods floorspace. Most superstores include a proportion of non-food floorspace; we have adjusted the net floorspace to identify the proportion of sales space allocated for convenience goods. This accords with the expenditure data and the expenditure assumptions used.

Market Share

4.13 For the purposes of this assessment we have assumed a constant market share throughout.

Town Centre Analysis

Felixstowe

Convenience Goods

- 4.14** We have estimated the draw of each of the main foodstores in Felixstowe town centre (Co-op Solar and Tesco Metro), other smaller and independent convenience goods stores, and the total town centre convenience trade draw.
- 4.15** It is evident from our analysis that despite being the largest town centre in the district, the town centre's convenience goods trade draw is relatively self-contained. Felixstowe's catchment for convenience goods shopping focuses on those areas immediately covering and surrounding the town centre within the Felixstowe peninsula. The highest trade draw for convenience goods is in Zone 1 (47%), the zone in which Felixstowe is located. Within this zone, 15% of convenience goods expenditure goes to the Ipswich Eastern Fringe. Felixstowe attracts some limited trade from Zone 2 (6%), which is located between Felixstowe and Ipswich, but the Ipswich Eastern Fringe achieves a higher market share from this area (54%). Beyond Zones 1 and 2, market shares fall off, to less than 3% in Survey Zones 3, 6, 7 and 9.
- 4.16** Table 3 (APPENDIX 2) indicates the trade draw of the main convenience goods shopping destinations in Felixstowe, namely the Co-op Solar and Tesco Metro. It is evident that the foodstores have a similar level of trade draw within Zone 1 (22% and 17% respectively). At 2008, we estimate that the Co-op Solar has a turnover of approximately £12m. This equates to a sales density of approximately £6,091 per sq m net. Compared to an estimated 'average' sales density for Co-op of £5,239 per sq m net this indicates that the store is trading well. We estimate that the Tesco store within the town centre has a turnover of approximately £8.7m. This equates to a convenience goods sales density of approximately £18,393 per sq m net. This is significantly above the level of trade based upon estimated company average sales densities for Tesco (of about £12,435 per sq m net) and indicates that stores are overtrading.
- 4.17** Other convenience goods shopping destinations in the town centre cater principally for top up shopping. We forecast that these stores will collectively achieve a turnover of approximately £5m, equating to an average turnover of £5,470 per sq m net, which is again larger than would be expected.
- 4.18** We estimate that the total convenience goods turnover of Felixstowe town centre is currently approximately £25.8 m (Table 4, APPENDIX 2). Based upon the net sales floorspace of approximately 3,333 sq m, Felixstowe currently has a convenience goods sales density of £7,740 per sq m net (Table 5, APPENDIX 2). This is above our estimate of company 'average' sales densities for the principal and local foodstores in the town centre (£6,006 per sq m net – Table

5a, **APPENDIX 2**). Adopting this average as a benchmark, and based on current market shares, we have identified a notional capacity for up to 825 sq m net of convenience goods floorspace by 2013, rising to 1,155 sq m net by 2018, and 1,356 sq m net by 2023, with capacity for 1,439 sq m net by 2025.

4.19 The out of centre Morrison's (identified as the former Safeway in the 2003 assessment) at Cavendish Park has a marginally greater trade draw than any of the individual town centre convenience goods stores in both Zones 1 and 2. It draws 27% of convenience goods trade from Survey Zone 1. The combined convenience goods market share of the town centre and Morrison's in Zone 1 is 74%. Morrison's also attracts 8% from Survey Zone 2, but does not draw trade from any other Zones in the survey area, reflecting the strong competition in the Ipswich eastern fringe to the north of this area.

4.20 We estimate that the Morrison's currently has a turnover of approximately £14.9m (Table 7, **APPENDIX 2**) which equates to approximately 60% of the combined turnover of all the town centre convenience stores. We estimate that based upon this turnover, with a net convenience goods sales area of approximately 1,696 sq m, the sales density of the store is approximately £8,785 per sq m net (Table 8, **APPENDIX 2**). The sales density is below the level based upon Morrison's company average sales densities (£11,130 per sq m net), and well below the average of other operators. This reflects the competition to the north of the area, particularly the Ipswich Eastern Fringe, and current strong trade draw patterns of the town centre main foodstores, in particular Tesco.

4.21 Overall in the convenience sector, our assessment highlights little residual capacity for any significant additional floorspace. We consider there is, however, the potential to increase market shares by recapturing trade 'leaking' to the Ipswich Eastern fringe through the development of a new foodstore. However, the priority should be to enhance the convenience retail offer in defined centres. Development opportunities are considered in Section 5.

Comparison Goods

4.22 Turning to the comparison goods sector, Table 3, **APPENDIX 2** indicates the trade draw to Felixstowe town centre. As with convenience goods it is evident that the town centre has a focused catchment area based on Zone 1 and to a lesser extent Zone 2. It draws almost 50% of comparison goods trade from Zone 1 and almost 15% from Zone 2. Felixstowe also draws a small proportion of trade from Zone 3, 5, 7, 8 and 9.

4.23 On the basis of these market shares, we estimate that Felixstowe town centre currently has a comparison goods turnover of approximately £55.5m (Table 4, **APPENDIX 2**). With an existing shop floorspace of approximately 11,900 sq m net, we estimate that Felixstowe has a sales density of approximately £4,664 per sq m net. Based on our experience elsewhere, we consider that Felixstowe is performing adequately in this sector, for a centre of its scale and function.

- 4.24** The competing influence of centres in the wider vicinity outside Suffolk Coastal District is evident. The other five town centres within Suffolk Coastal District do not draw any trade from Zone 1, Felixstowe's core catchment. Retail warehousing in Ipswich draws only 8% from Zone 1. It is evident therefore that the remaining comparison goods trade in Zone 1 is being diverted to higher order centres in the wider catchment, notably Ipswich. With further improvements planned in Ipswich, and the wider, national trend towards retail polarisation, the challenge to Felixstowe is to maintain its current market share in the face of mounting competition.
- 4.25** Based upon existing market shares, we forecast that there will be capacity to support further comparison goods floorspace in Felixstowe by virtue of growth in population and available expenditure. We estimate that by 2013, based on current market shares, there would be theoretical capacity to support an additional 2,115 sq m net of comparison goods floorspace increasing to approximately 4,895 sq m net by 2018, 7,638 sq m net by 2023 and 9,165 sq m net by 2025. There is some potential to consolidate and enhance the position of the centre if realistic development options can be identified and brought forward during the Plan period.

Woodbridge

Convenience Goods

- 4.26** We have examined the trade draw to Budgens, Co-op and the other small and independent convenience goods stores which constitute the convenience retail sector of Woodbridge. The highest trade draw for convenience goods is in Zone 4 (22%), followed by Zones 2 and 5 (16% from each zone). These zones are all located in the southern area of the defined survey area. Beyond this, market shares fall off, to less than 7% in Zones 6, 8 and 9. Woodbridge has no market share in Zones 1, 3, 7 and 10.
- 4.27** Based on these market shares, we have calculated the turnover of each of the main foodstores in Woodbridge town centre, and combined the figures into a total town centre convenience goods turnover. We estimate that the total turnover of Woodbridge town centre is currently approximately £12.3m (Table 10, APPENDIX 2). Based upon a net sales floorspace of approximately 1,902 sq m, Woodbridge currently has a convenience goods sales density of £6,446 sq m net (Table 11, APPENDIX 2). This is as a result of the significant estimated turnover of the Co-op which we regard as being over represented by the household survey.
- 4.28** Other convenience goods shopping destinations in the town centre cater principally for top up shopping. We forecast that these stores will collectively achieve a turnover of approximately £3.8 million, equating to an average turnover of £5,451 per sq m net. This is above our estimate of turnover.

4.29 We have assessed the capacity for further convenience goods floorspace in Woodbridge, based upon existing market shares, and adapting a nominal 'average' sales figure of £4,972 sq m net as a benchmark above which capacity arises. Our modelling indicates that based on current market shares, there will be limited residual capacity for further convenience goods floorspace in Woodbridge over the period to 2013, of approximately 413 sq m net, rising to 544 sq m net at 2018, then to 670 sq m net at 2023 and 723 sq m net in 2025.

4.30 Given the relative close proximity of food retailing within the Ipswich Eastern Fringe, and the significant levels of expenditure it draws from Woodbridge and its natural catchment area, we consider there is the potential to increase market shares to support a new quality foodstore or to improve the existing provision. The Tesco at Martlesham Heath currently draws 41% of convenience goods trade from Zone 4, 40% from Zone 2 and 56% from Zone 5. Improvements in convenience goods provision within Woodbridge town centre would recapture trade back from the Tesco at Martlesham Heath and Sainsbury's store at Warren Heath. Conversely, for the same reasons outlined above, further foodstores or extensions to existing foodstores outside the town centre would further increase the outflow of expenditure from the town centre.

Comparison Goods

4.31 Table 9, (APPENDIX 2) indicates the trade draw to Woodbridge town centre for comparison goods. It is evident that market shares are higher throughout the survey area for comparison goods compared to convenience goods. The town centre draws 24% of comparison goods trade from Zone 5, 23% from Zone 4 and 18% from Zone 2. Relatively high market shares are also apparent in Zone 9 (14%) and Zone 8 (10%). This is reasonably encouraging given the competition Woodbridge faces in the comparison sector, both from Ipswich and retail warehousing on the Ipswich Eastern Fringe

4.32 On the basis of current market shares, we estimate Woodbridge town centre currently has a comparison goods turnover of approximately £37 million. Based upon an existing shop floorspace of approximately 5,693 sq m net, we estimate that Woodbridge has a sales density of approximately £6,499 per sq m net. We consider Woodbridge is trading well in terms of comparison goods, particularly compared to the other Suffolk Coastal towns. Based on current market shares, our assessment indicates residual capacity to support new floorspace of up to 1,502 sq m net to 2013, rising to 3,181 sq m net at 2018, then to 5,272 sq m net at 2023 and 6,441 sq m net in 2025.

Aldeburgh

Convenience Goods

- 4.33** Table 12, (APPENDIX 2) indicates the trade draw to Aldeburgh Town Centre for convenience goods, in particular trade drawn to the Co-op store on the High Street and other convenience stores. It is evident that this trade draw is focused almost entirely on survey Zone 7. It is a limited draw reflecting the nature of the offer in Aldeburgh Town Centre, and the main foodstore competition from the Tesco Superstore at Martlesham Heath, and foodstores in Leiston, Saxmundham and Woodbridge. The Co-op and other local foodstores in Aldeburgh Town Centre perform a modest main food function, drawing only 9% of trade from Zone 7, its core catchment, and 1% from Zone 4.
- 4.34** We estimate that overall Aldeburgh Town Centre has a convenience goods turnover of approximately £1.7m in 2008. Based on the existing shop floorspace of 670 sq m net, we estimate that Aldeburgh has a convenience sales density of approximately £2,566 per sq m net. This is below our estimate of company average sales densities for the convenience goods stores currently present in Aldeburgh town centre (£4,743 per sq m net), suggesting increased competition from within the catchment area.
- 4.35** The Co-op foodstore on the High Street in Aldeburgh has a higher trade draw than the other town centre foodstores. It draws 7% of trade from Zone 7 (compared to 2% being drawn to other local foodstores) and has an estimated total convenience goods turnover of just over £1.1m. Within existing shop floorspace of 220 sq m net, we estimate a sales density of approximately £5,000 per sq m net, i.e. only slightly short if the estimated 'company average' sales densities for Co-op foodstores (£5,239 per sq m net).
- 4.36** Our analysis suggests that trading conditions in the main town centre foodstore are relatively healthy but other local foodstores are trading well below the sales densities we would normally expect. We anticipate that this in part reflects the special circumstances of Aldeburgh.
- 4.37** A planning application for a supermarket with a net sales area of 463 sq m was submitted to the District Council in August 1996. The Council resolved to grant planning permission for the store subject to provisos concerning net sales floorspace, design details, and the erection of the boundary wall. This application was never implemented and in fact has now lapsed. However it does demonstrate the quantitative need for a new or extended foodstore offer in the centre. As with any of these historic towns the difficulty facing development is the availability of sites.
- 4.38** Our modelling indicates that based on current market shares, the stores are currently under trading, with an oversupply of floorspace. Therefore there is no further capacity for a food store in Aldeburgh. The Council should be aware,

however, that as the centre is anchored by a Co-op, who have recently bought Somerfield, they are currently looking at their portfolio. While no decisions have been made at this time, the possibility might exist that the Co-op is operated by another food store retailer. This may result in an increased market share for the centre.

- 4.39** While Aldeburgh continues to be 'attractive' as a tourist destination, and to the 'second homers', the centre's relatively isolated location means it is more reliant upon its convenience shopping function than larger centres.

Comparison Goods

- 4.40** With regards to the trade draw to Aldeburgh town centre for comparison goods, Table 12, (APPENDIX 2) indicates that this trade draw is focused almost entirely on survey Zone 7. However the draw is limited, taking just 4% of comparison goods trade from Zone 7 and 1% from Zone 6 and from Zone 8.
- 4.41** We estimate that overall Aldeburgh Town Centre has a comparison goods turnover of approximately £2.4m in 2008. Based on the existing shop floorspace of 1,576 net, we estimate that Aldeburgh has a comparison sales density of approximately £1,505 per sq m net.
- 4.42** At 2013 residual expenditure exists of £474,000, rising to £2.3m by 2025. By applying a turnover figure of 4,000 per sq m net, capacity exists for 105 sq m net of comparison floorspace at 2013, rising to 209 sq m net at 2018, then to 344 sq m net at 2023, and 419 sq m net at 2025.

Saxmundham

Convenience Goods

- 4.43** We have examined the trade draw of Somerfield and the other small and independent convenience goods stores in Saxmundham. The centres catchment for convenience goods shopping is largely confined to survey Zone 6, from which it attracts 55% of the available spend, although it also draws trade from Zone 2 (1%), Zone 4 (1%), Zone 5 (6%), Zone 7 (20%), Zone 8 (1%) and Zone 10 (2%). This wide catchment area (compared to Aldeburgh, Leiston and Framlingham), reflects the key role that the main foodstore, Somerfield, plays in contributing to the town centre's vitality and viability.
- 4.44** We estimate that Saxmundham town centre has a total convenience goods turnover of approximately £15.5m (Table 16, APPENDIX 2). With a net convenience goods sales area of approximately 1,844 sq m, the sales density of the town centre is approximately £8,419 per sq m net. This is above our estimate of 'company average' sales densities for the main and local foodstores in the town centre (£4,841 per sq m net). One of the reasons existing foodstores are performing well is the relatively poor provision in Aldeburgh. 20% of

expenditure in Zone 7, within which Leiston and Aldeburgh are located within, is being drawn to Saxmundham town centre.

4.45 The overall performance of convenience stores in Saxmundham town centre masks variation in the performance of individual stores. Based upon the household survey, we estimate Somerfield to have a turnover of £14.5m, equating to a sales density of approximately £20,490 per sq m net. This is significantly above the Somerfield company average of £5,391 per sq m net, and above the average turnover achieved by the leading superstore operators. This suggests the store is trading extremely well.

4.46 We have assessed the capacity for further convenience goods floorspace in Saxmundham, based upon existing market shares. Our retail capacity modelling indicates residual capacity for approximately 802 sq m net of further convenience goods floorspace in Saxmundham over the period to 2013, rising to 942 sq m net to 2018, and then 1,094 sq m net to 2023, and 1,158 sq m net to 2025 (Table 17). By reducing the sales per sq m (£) to company average figures at 2013 result in the identification of surplus expenditure. It may be possible to accommodate a larger development based on an uplift in market shares, although it would be necessary to consider the implications of such development for neighbouring centres. To safeguard the convenience shopping role of Saxmundham and the other nearby centres, it is important that any new foodstore development should be located in a key town centre location which would subsequently be effective in providing a strong anchor retailer.

Comparison Goods

4.47 Table 15, (APPENDIX 2) indicates the trade draw to Saxmundham town centre for comparison goods. It is evident that market shares are considerably lower throughout the survey area for comparison goods compared to convenience goods. The town centre draws 12% of comparison goods trade from Zone 6 and 1% from Zone 5 and from Zone 7.

4.48 We estimate that overall Aldeburgh Town Centre has a comparison goods turnover of approximately £5.6m in 2008. Based on the existing shop floorspace of 1,641 net, we estimate that Aldeburgh has a comparison sales density of approximately £3,426 per sq m net.

4.49 At 2013 residual expenditure exists of £1m, rising to £5.6m by 2025. By applying a turnover figure of 4,000 per sq m net, capacity exists for 229 sq m net of comparison floorspace at 2013, rising to 491 sq m net at 2018, then to 833 sq m net at 2023, and 1,022 sq m net at 2025.

Leiston

Convenience Goods

- 4.50** Table 18, (APPENDIX 2) indicates the trade draw to the Co-op Solar store and other convenience stores in Leiston. Leiston draws from survey Zone 7 (50%) and to a lesser extent Zone 6 (6%), reflecting the local nature of the food offer in Leiston town centre. Trading patterns in Leiston's local catchment area are influenced by the Somerfield in Saxmundham and the Tesco Superstore, Martlesham Heath.
- 4.51** We estimate that overall, Leiston town centre has a convenience goods turnover of approximately £9.6m. Based upon the existing shop floorspace of 1,087 sq m net, we estimate that Leiston has a convenience sales density of approximately £8,864 per sq m net.
- 4.52** The overall performance of convenience stores in Leiston town centre masks variation in the performance of individual stores. Table 18 highlights that the Co-op on Sizewell Road draws some 48% from its own Zone (7). We estimate that the store has a total convenience goods turnover of £9m. With an existing shop floorspace of 628 sq m net, we estimate a sales density of approximately £14,454 per sq m net. This is considerably above estimated 'company averages' (£5,239 per sq m net) to the size of the store and the relatively weak food provision present elsewhere in the town centre.
- 4.53** Other convenience goods shopping destinations in the town centre cater principally for top up shopping. We forecast that these stores will collectively achieve a turnover of approximately £0.6 million, equating to an average turnover of £1,216 per sq m net.
- 4.54** Our retail capacity modelling indicates that there is a very limited residual capacity for further convenience goods floorspace in Leiston over the period to 2025. We have calculated a notional 'capacity' for approximately 527 sq m net to 2013, rising to approximately 599 sq m net to 2018, then 677 sq m net to 2023 and 710 sq m net to 2025.
- 4.55** However, our overall assessment of Leiston in this study has highlighted the important role of food retailing, a strong local catchment area, and the potential vulnerability of Leiston to the effects of and diversion of convenience retail trade. It may be appropriate to consider a qualitative improvement in convenience goods provision in the centre over the plan period to retain Leiston's important food shopping role.

Comparison Goods

- 4.56** With regards to the trade draw to Leiston town centre for comparison goods, Table 18, (APPENDIX 2) indicates that this trade draw is focused almost entirely on survey Zone 7 (19%). Limited trade is also drawn from Zone 6 (5%) and just 1% from Zone 5.
- 4.57** We estimate that overall Leiston Town Centre has a comparison goods turnover of approximately £8.5m in 2008. Based on the existing shop floorspace of 2,750 net, we estimate that Leiston has a comparison sales density of approximately £3,084 per sq m net.
- 4.58** At 2013 residual expenditure exists of £1.7m, rising to £8.1m by 2025. By applying a turnover figure of 4,000 per sq m net, capacity exists for 373 sq m net of comparison floorspace at 2013, rising to 735 sq m net at 2018, then to 1,206 sq m net at 2023, and 1,469 sq m net at 2025.

Framlingham

Convenience Goods

- 4.59** We have estimated the draw of Framlingham's main town centre foodstore, Co-op Solar and other smaller and independent convenience goods stores. Framlingham's main catchment area comprises (Zones 8 and 9 from which it draws 14% and 46% respectively). Beyond these zones, trade draw to Framlingham town centre falls away almost entirely.
- 4.60** We estimate that Framlingham has a total convenience goods turnover of approximately £8m (Table 22, APPENDIX 2). With a net convenience goods sales area of approximately 1,590 sq m, the sales density of Framlingham town centre is approximately £5,045 per sq m net. This is broadly consistent with our estimate of notional 'company average' sales densities for the main and local foodstores in the town centre (£5,018 per sq m net) (Table 23/23A).
- 4.61** We estimate that the Co-op in Framlingham town centre has a turnover of approximately £7m. This equates to a sales density of £6,241 per sq m net. This is above our expectations for this type of store (£5,239 per sq m net). Other convenience goods shopping destinations in the town centre cater principally for top up shopping, and are estimated to collectively achieve a turnover of approximately £1 million, equating to an average turnover of £2,236 per sq m net. Again, this is broadly in line with our expectations for the centre.

Comparison Goods

- 4.62** With regards to the trade draw to Framlingham town centre for comparison goods, Table 21, (APPENDIX 2) indicates that this trade draw is focused almost entirely on survey Zone 9, drawing 14%. Limited trade of just 1% is also drawn

from Zone 6, and from Zone 8.

4.63 We estimate that overall Aldeburgh Town Centre has a comparison goods turnover of approximately £4.5m in 2008. Based on the existing shop floorspace of 1,808 net, we estimate that Framlingham has a comparison sales density of approximately £2,492 per sq m net.

4.64 At 2013 residual expenditure exists of £789,000, rising to £4.2m by 2025. By applying a turnover figure of 4,000 per sq m net, capacity exists for 174 sq m net of comparison floorspace at 2013, rising to 375 sq m net at 2018, then to 631 sq m net at 2023, and 772 sq m net at 2025.

Ipswich Eastern Fringe

Convenience Goods

4.65 The Ipswich Eastern Fringe is located on the boundary of the identified survey area within and adjacent to Zones 2 and 3. It is evident from our retail capacity modelling that out of centre retailing in this location has a significant influence on shopping patterns within Suffolk Coastal District. Drawing on our household telephone interview survey, we have been able to estimate the trade draw from the survey area to each of the main out of centre foodstores in Ipswich Eastern Fringe, namely Tesco, Kesgrave; Tesco, Martlesham Heath; and Sainsbury's, Warren Heath. We have also looked at trade draw to the Euro Retail Park and Beardmore Retail Park.

4.66 It is evident that the Ipswich Eastern Fringe draws trade from all 10 Zones. The main convenience goods trade draw is from Survey Zone 3 (79%). This is the Zone in which much of the Ipswich Eastern Fringe is located. These stores also have a 55% market share in Zone 2, 15% in Zone 1 and 50% in Zone 4, illustrating the significant competition Woodbridge and Felixstowe face from this area. The influence of Tesco at Martlesham Heath is felt throughout the study area.

4.67 We estimate that in 2008 the three stores (Tesco, Kesgrave; Tesco Extra, Martlesham Heath; and Sainsbury's, Warren Heath), draw approximately £75.5m from the survey area. The Tesco at Martlesham Heath has the greatest influence, drawing approximately £53m of convenience goods trade. To put this figure in context, the Tesco at Martlesham Heath accounts for 70% of the total convenience expenditure within the Ipswich Eastern Fringe. The Tesco store at the Kesgrave is drawing approximately £10m from the survey area, or 13% of total available convenience goods expenditure. The Sainsbury's at Warren Heath is drawing approximately £12m of total convenience goods trade or 16%.

4.68 Overall, the three foodstores draw 34% of total convenience goods trade from the defined survey area. This dominant position is likely to be further reinforced, at the expense of the existing town centres, by the proposed store extensions.

The only effective measure to reverse this pattern is by the provision of significantly improved main foodstore facilities within the existing centres in Suffolk Coastal District.

Comparison Goods

- 4.69** Table 24, (APPENDIX 2) indicates the trade draw for comparison goods in the Ipswich Eastern Fringe. It is evident that the Ipswich Eastern Fringe draws trade from all 10 Zones. The main comparison goods trade draw is from Survey Zone 3 (21%). This is the Zone in which much of the Ipswich Eastern Fringe is located. These stores also have a 17% market share in Zone 28, 16% in Zone 5 and 14% in Zones 2 and 4, illustrating the significant competition Felixstowe and Woodbridge along with the smaller towns face from this area.
- 4.70** We estimate that overall Ipswich Eastern Fringe has a comparison goods turnover from retail warehouses of approximately £54.8m in 2008.

5

DEVELOPMENT OPPORTUNITIES

5. FELIXSTOWE TOWN CENTRE DEVELOPMENT OPPORTUNITIES

- 5.1** In this section retail development opportunities are considered for Felixstowe. The process of determining suitable locations for retail development is contained in PPS6 in the form of a sequential site test. This sequential test states that town centre sites are the preferred location for retail development, with edge of centre sites only to be considered thereafter. In assessing this, sites which are sequentially preferable must be suitable, available and viable. This sequential test is used to assess the sites described below.
- 5.2** Where retail need is identified, then Local Authorities should ideally allocate sites for a 5 year period to meet this capacity. For Felixstowe, the identified retail capacity for convenience goods is 1,439 sq m net by 2025, and 9,165 sq m net for comparison goods by 2025. To meet this need Felixstowe's potential development sites are described below; their size, current use and potential future use, the priority afforded to each opportunity, broad timescales involved, and key actions to bring forward the sites.
- 5.3** This site of 3,000 sq m lies in the local plan designated town centre. A plan is attached at **APPENDIX 3**. Its current uses are several vacant outlets, stores and three light industrial units including a tool hire shop. Several of the buildings on the site are dilapidated and the environmental quality of the area is poor. Surrounding land uses are predominantly residential to the south and west with retail to the east and north, including the Co-op Solar supermarket and car park.
- 5.4** Retail uses could either front St Andrews Road or even possibly, and especially the western part of the site, face the foodstore car park. The development opportunity could accommodate a number medium sized retail units and better help meet the current occupier requirements for the town. There might also be scope to include residential units on upper floors.
- 5.5** A key factor in bringing forward this site is to assemble the land. The Council could take a leading role in initiating discussions between the owners in this area; this should be considered the first step to taking forward proposals here. This site should be afforded a high priority and could be delivered in the medium term.
- 5.6** Importantly, this land should also be considered in the context of a wider opportunity to regenerate the area including land at High Road West (as discussed below) the Co-op foodstore, Homebase, train station and associated car park. A listed building is also present, as well as a market on Thursday to Saturday. The entire area extends to 12.3 acres. A plan is attached at **APPENDIX 3**. A more detailed feasibility/masterplanning exercise of this land would be recommended, together with financial testing of indicative proposals.

Alternatively, the AAP process might be a suitable vehicle to test this site further. The Co-operative Society would also be a key figure in the proposals given their major land owning in the area. Appropriate masterplanning of this area may create a better opportunity for additional retail floorspace and possibly a stronger offer at the northern end of Felixstowe town centre. To deliver this bigger opportunity may well require Public Sector intervention and possibly through the use (or threat of) Compulsory Purchase powers. As a first step however, design and financial testing of the site as well as consultation with key stakeholders should be undertaken to determine its scope and suitability for development.

High Road West

- 5.7** Three plots make up this moderate sized opportunity of 1.7 acres **APPENDIX 3**. The site lies in the town centre boundary. The fire station occupies the westernmost plot. Adjacent is an Esso petrol station with a large vacant building to the rear. A doctor's surgery occupies the corner site at the junction of High Road West and Hamilton Road. None of the buildings are of any particular architectural merit. To the south lies some small retail units, the market, Co-op supermarket and associated car park. The train station also lies very close to the site. To the north are residential uses and to the east a hotel.
- 5.8** Assuming the site can be assembled, there is a good opportunity to develop retail units which overlook the foodstore car park. This area has the opportunity to provide medium sized and/or large units. There might even be the opportunity to increase car parking benefiting both retailers and the train station.
- 5.9** Taking forward this opportunity rests strongly on the ability to re-locate the fire station and the doctor's surgery. The latter use might be integrated into any new scheme. Examination of this area should however be considered in a wider masterplan for the area encompassing the foodstore, car park and train station and other land described above. Consideration of this site and the wider masterplan should be given a high priority by the Council. Scheme delivery could occur in the mid to long term.

Land at the corner of Hamilton Road and Cobbold Road

- 5.10** This small site of 1650 sq m is currently occupied by a cinema operator (**APPENDIX 3**). This site lies close to the prime pitch with retail uses immediately adjacent to the north, east and south. To the west is housing.
- 5.11** Were the opportunity to re-locate the cinema to arise this site could be re-developed for retail uses. The site could offer potential for several moderate sized units or a single small anchor store and create a better retail destination in the centre of the town. The likely single ownership of the site could allow development to come forward more readily. This town centre site should be given a moderate priority and is only likely to be realised in the mid to long term.

To take forward this site the Council could seek initial discussions with the owner/occupier to understand their future aspirations and requirements.

- 5.12** A more ambitious approach to this area could also encompass Leobald/Crescent Road car park as well as a cluster of small retail units immediately to the south, including Blockbusters, and a small car salesroom. A re-configuration of the road network in this area may also be worth examining. A key issue would be however any loss of car parking and associated income to the Council.

143-147 Hamilton Road Service Areas and Stores

- 5.13** This town centre site of 1.1 acres is currently occupied by the Post Office and Bureau de Change (**APPENDIX 3**). Land to the rear of this building is a mixture of storage sheds and service areas and is likely to be in various ownerships. Retail units and service yards surround the site, save to the west which is characterised by housing.
- 5.14** This site could offer the opportunity for several large retail units to front Hamilton Road, or possibly a small anchor store/major shop unit. Unlocking this site could also open up the possibility of including residential or other uses to the rear (perhaps even car parking). The development of this area would improve the poor and fragmented streetscape in this area, especially along Penfold Road.
- 5.15** The key issue in realising this site is relocating the post office. A smaller retail unit might suit their purposes better if the sorting office function were located elsewhere. Council intervention could be required to take forward this opportunity, and especially through initiating early discussions between land owners. The site should be afforded a moderate priority and could be realised in the mid to long term.

Ranelagh Road Car Park

- 5.16** This town centre site of 1.6 acres is currently a Council owned surface level car park with an estimated 210 spaces (**APPENDIX 3**). Surrounding land uses are mostly residential, save to the west and the link through to Orwell Road with a number of independent and service retailers. A number of vacancies are also present on this street.
- 5.17** Although the site is of a reasonable size, it is not particularly well related to the town centre. Achieving a suitable quality of design for retail uses would also be challenging, given the attractive surrounding residential areas, and the conservation area status. Any loss of car parking might also be seen as undesirable. Were development be considered here then possibly a small foodstore could be accommodated subject to demand. In turn might generate better footfall through Orwell Road and improve the general retailing environment in this area. This site should however be viewed as only as a much

longer term prospect and afforded a low priority; there are more suitable sites for retail development in Felixstowe, and which could offer greater benefit.

Strategic Overview

5.18 Felixstowe town centre does offer some opportunities for retail development. In the main these require land assembly to occur. This may well require the Council to take a more pro-active role in facilitating retail development, as recommended by PPS6. This is particularly so, given that none of the sites appear to be immediately available and intervention may be the only way of unlocking their potential. The area that offers the greatest scope for potential re-development and provision of retail development lies at the northern end of the town and particularly around the Co-op foodstore and car park. Two sites here – Land at High Road West and at St Andrews Road – could offer good prospects to meet future retail requirements. What would be far more beneficial however would be to undertake a wider masterplanning exercise of this northern area to understand its full potential and how it may better contribute towards Felixstowe's retail offer.

5.19 The Council should also recognise that the reuse of vacant units in the town centre would also be expected to meet retail need. Equally, extension to existing units may also contribute toward soaking up capacity, should this be proposed.

6

CONCLUSIONS AND RECOMMENDATIONS

6. CONCLUSIONS AND RECOMMENDATIONS

6.1 We have summarised the main findings of our research as follows:

- The focus of National Retail Planning Policy contained within PPS6 continues to promote the 'town centre first principle' and requires local planning authorities to plan positively for growth over the plan period. This involves planning for growth and development of existing centres and promoting and enhancing existing centres by focussing development within them. Local planning authorities should also ensure that consumer choice is enhanced by making provision for a range of shopping, leisure and local services which provide genuine choice to communities particularly socially excluded groups.
- Following the commitment in the Planning White Paper to review the current approach set out in PPS6 to the assessment of impact of proposals outside of town centres, in a way which maintains a strong focus on the town centre first policy and continues to promote competition, partial revision to PPS6 was considered in 2008.
- The consultation period for the draft has now finished and a revised PPS6 is expected to be published in the Spring of 2009. The proposed changes are selective with the Government only proposing to revise certain aspects of the current PPS6. The changes are not about revisiting the fundamentals of Government policy but rather an attempt to improve the effectiveness of policy. The key changes proposed include an enhanced impact test which will require applicants to consider such issues as retail diversity, consumer spending, loss of trade, impact on town centre investment, scope for regeneration and job creation. The revised policy also proposes the removal of the needs test which is considered a 'blunt instrument' which has 'unintentionally stifled diversity and consumer choice'. However, in planning positively for growth local authorities are still required to undertake retail capacity assessments to inform their emerging LDF's.
- The sequential test is maintained, but there appears a further concession to operator business models of large format stores which suggests there will be a positive treatment of edge of centre sites for larger formats, subject to impact, where it can be demonstrated that the range of goods of an operator would be compromised. Enhanced reference to competition and raising the productivity growth of the UK economy suggest employment and regeneration potentially being moved up the agenda for consideration for new retail proposals.
- The East of England Plan (May 2008) seeks to maintain and enhance the towns and cities of the East of England and create a high quality of urban life, in accordance with PPS6.

- While we consider that the Local Plan covers important issues and plans effectively for the future of the town centres, the Core Strategy, which is expected to be formally adopted in May 2009, will establish the overarching vision for the Borough up to and beyond 2025. With particular reference to retail centres, the strategy will particularly consider the need for new development, town centres as focal points for this development, identification of development sites and preventing the loss of town centre retailing and enhancing the environment.
- In terms of the wider vicinity and retail hierarchy, Norwich, Ipswich, Colchester, Bury St Edmunds and Lowestoft are all large 'higher order' centres. They all have more retail floorspace and a broader retail offer, and to varying degrees overlap with and serve the catchments of the six Suffolk Coastal Town Centres. Norwich, Ipswich and Colchester will reinforce their regional attractions as shopping destinations through committed new developments, and we anticipate the strong retailer demand to locate in these centres will continue.

Felixstowe

- 6.2** Consistent with our findings of 2003 Felixstowe continues to operate as a relatively busy, vital and viable town centre, with an acceptable range of shopping facilities which is broadly comparable to a typical UK centre of this size. The lack of a department store remains a weakness and further key anchor stores including clothing a fashion wear would serve to strengthen the town.
- 6.3** In terms of convenience provision this is limited to a Co-op and Tesco Metro and smaller independent operators. The opportunity to increase this convenience provision would contribute to the stemming of leakage of convenience expenditure from the centre and claw back trade from Ipswich and other out-of-centre free standing foodstores.
- 6.4** Although prime rents remain weaker than larger competing centres they have experienced improvements over recent years. This coupled with the relatively low vacancy rates point towards a healthy and vital centre.
- 6.5** In terms of quantitative capacity the centre's convenience goods provision remains limited in the form of the Co-op Solar and Tesco Metro. Drawing upon the results of the household survey it is clear that both stores are trading above their notional company averages and this overtrading was confirmed during our site visits. A number of issues can result from foodstores overtrading, including queues at checkouts and limited or empty produce on shelves, which in turn makes for a less enjoyable shopping trip and increases the risk of shoppers travelling to other stores to undertake their convenience shopping. Alternatively operators may look to redress this balance by seeking extensions to their existing premises.

- 6.6** Based upon current market shares we have identified a notional capacity for additional convenience floorspace of up to 825 sq m net of convenience floorspace by 2013 rising to 1,155 sq m net by 2018, 1,356 sq m net by 2023 and 1,439 sq m net by 2025.
- 6.7** In terms of out-of-centre provision this is now provided by Morrisons which has occupied the former Safeway store as identified in the 2003 assessment. Whilst we would have expected this store to be performing well its sales density is below the notional company average and reflects the significant competition to the north of the area particularly from the Ipswich eastern fringe and also the strong draw of the Tesco in the town centre.
- 6.8** Whilst limited capacity exists for additional convenience floorspace the potential does exist to increase the market share by recapturing trade currently leaking to the Ipswich eastern fringe through the development of a new or extended foodstore.
- 6.9** Whilst Felixstowe town centre provides the opportunities for additional retail development these will require land assembly and the Council to take a proactive role in facilitating retail development, as recommended by PPS6.
- 6.10** As identified in Section 5 the greatest scope for potential redevelopment lies at the northern end of the town and particularly around the Co-op foodstore and car park. In taking matters forward we would recommend that a wider master planning exercise is considered for this area to fully understand its potential and how it could affectively contribute to Felixstowe's retail offer and the overall increase of market share for the Suffolk Coastal towns.
- 6.11** Despite the lack of a department store our analysis of the quantitative capacity assessment demonstrates that Felixstowe has a comparison sales density of approximately £4,600 per sq m net which, based upon our experience elsewhere illustrates that the centre is performing reasonably well given its size and location. Nevertheless, the competing influence of higher order centres outside of the Suffolk Coastal District is evident.
- 6.12** Based upon existing market shares, we forecast that capacity exists by 2013 to support an additional 2,115 sq m net of additional comparison floorspace increasing to 4,895 sq m net by 2018, 7,638 sq m net by 2023 and 9,165 sq m net by 2025.

Woodbridge

- 6.13** As previously reported, Woodbridge is a vital and viable market town and an important tourist destination. Nevertheless the centre would benefit from additional convenience retail provision to supplement the existing Budgens foodstore. Whilst the relatively limited provision of mainstream comparison retailers exist this is supplemented by a good range of independent/specialist retailers which contribute to the centre vitality and viability. In common with the other centres within Suffolk Coastal the local shopping population at Woodbridge continue to travel to Ipswich for their main comparison goods shopping.
- 6.14** In considering the quantitative capacity within Woodbridge the main convenience provision is provided by the Budgens and Co-op. Whilst the overall performance of the town centre as a whole is considered healthy, we consider that the household survey has over emphasised the trade draw of the Co-op store at the expense of the much larger Budgens foodstore.
- 6.15** Based upon a constant market share we estimate that there will be limited residual capacity for further convenience floorspace in Woodbridge over the plan period. We estimate that by 2013 capacity will exist for approximately 413 sq m net, rising to 544 sq m net at 2018, 670 sq m net by 2023 and 723 sq m net of convenience floorspace by 2025.
- 6.16** The convenience provision within the centre is particularly vulnerable to provision within the Ipswich eastern fringe and in particular the Tesco at Martlesham Heath. Improvements to the convenience provision within Woodbridge town centre could potentially recapture trade lost to this easily accessible free standing foodstore and reduce leaking expenditure.
- 6.17** Turning to comparison goods, we estimate that Woodbridge town centre's sales density of approximately 6,500 sq m is particularly good compared to other Suffolk Coastal towns. Based upon a constant market share we estimate that capacity exists for new comparison floorspace of up to 1,502 sq m net by 2013 rising to 3181 sq m net by 2018, 5,272 sq m net by 2023 and 6,441 sq m net by 2025. Again the potential to accommodate any additional comparison goods floorspace is limited by the lack of sites and the close proximity of Ipswich and other high order centres.

Aldeburgh

- 6.18** Overall, the centre continues to provide an unspoilt and attractive location performing well in terms of its vitality and viability indicators. Whilst Suffolk Coastal District contains a network of historic town centres, arguably, the retail offer in Aldeburgh is more geared towards the tourist trade than the local population. Whilst demand for premises is good with no vacancies there is little space available to accommodate new retailers.
- 6.19** Based upon our quantitative assessment we estimate that the sales density of convenience provision is below the estimated company average sales density. This could be both as a result of limited provision but more likely the increased competition from provision within and beyond the catchment area. Whilst our analysis suggests that trading conditions in the Co-op remain healthy other local foodstores appear to be trading below notional sales densities.
- 6.20** Our assessment of convenience capacity, based upon a constant market share, concludes that there is currently a small oversupply of convenience floorspace over the plan period. We do note however that the centre is anchored by a Co-op who have recently purchased the Somerfield portfolio. As the Somerfield in Saxmundham is to be disposed of to be replaced by Waitrose, the future of the Aldeburgh Co-op should be monitored, as this may be surplus to requirements. Whilst this is purely speculation at this time an enhanced convenience retail offer would help to reduce leakage and increase the centres market share.
- 6.21** For the basis of a current market share, we estimate that Aldeburgh's town centre has capacity to support about 105 sq m net of additional comparison floorspace by 2013 rising to 209 sq m net by 2018, 344 sq m net by 2023 and 419 sq m by 2025.

Saxmundham

- 6.22** The centre continues to suffer from fragmentation of its retail offer by non retail uses and the up keep of shop fronts, especially in Market Place.
- 6.23** Although the convenience offer is considered acceptable, as with other centres within the district, an enhanced convenience offer could help to strengthen the centre and increase its market share. The range of comparison goods is more limited however. In considering the quantitative capacity for additional floorspace we estimate that the average sales density for the convenience provision is above the notional company average expected. One of the reasons for this is the relatively poor provision in neighbouring Aldeburgh and the strong performance of the Somerfield within Saxmundham which is currently turning over considerably in excess of the estimated company average. Based upon a constant market share we estimate that additional convenience capacity exists for approximately 802 sq m net by 2013, rising to 942 sq m net by 2018, 1,094 sq m net by 2023 and 1,158 sq m net by 2025.
- 6.24** To safeguard the convenience shopping role of Saxmundham and for that matter the other nearby centres, it is important that any new development is focussed within the existing centres.
- 6.25** In terms of comparison floorspace additional capacity is identified at 2013 for approximately 229 sq m net rising to 491 sq m net by 2018, 833 sq m net by 2023 and 1,022 sq m net by 2025.

Leiston

- 6.26** Unlike the three smaller centres, Leiston does not benefit from a strong tourist trade. Whilst the centre provides a broad diversity of uses and a below average vacancy rate the provision is somewhat fragmented resulting in low pedestrian movements along the High Street. The closure of non-retail units during the day also detracts from the centre's overall environmental quality. Nevertheless, the reduction in the number of vacancies since our 2003 assessment does demonstrate that improvements have been made within the centre.
- 6.27** Based upon the existing convenience floorspace we estimate that the centre has a convenience sales density of approximately £8,864 per sq m net. However as with other centres the overall performance of the convenience stores in the centre do mask variations in individual performance of stores. As a result of the Co-op on Sizewell Road drawing some 48% from its own zone (7) the store demonstrates a sales density considerably in excess of its estimated company average.
- 6.28** Our retail capacity modelling indicates that there is limited residual capacity for further convenience goods floorspace in the centre over the plan period. Based upon a constant market share capacity exists for approximately 527 sq m net by 2013, rising to 599 sq m net by 2018, 677 sq m net by 2023 and 710 sq m net by 2025. As with a number of other centres within the district the centre has a strong convenience role and this should be retained and or enhanced where appropriate.
- 6.29** Turning to comparison floorspace capacity exists at 2013 for about 373 sq m net rising to 725 sq m net at 2018, 1,206 sq m net by 2023 and 1,469 sq m net by 2025.

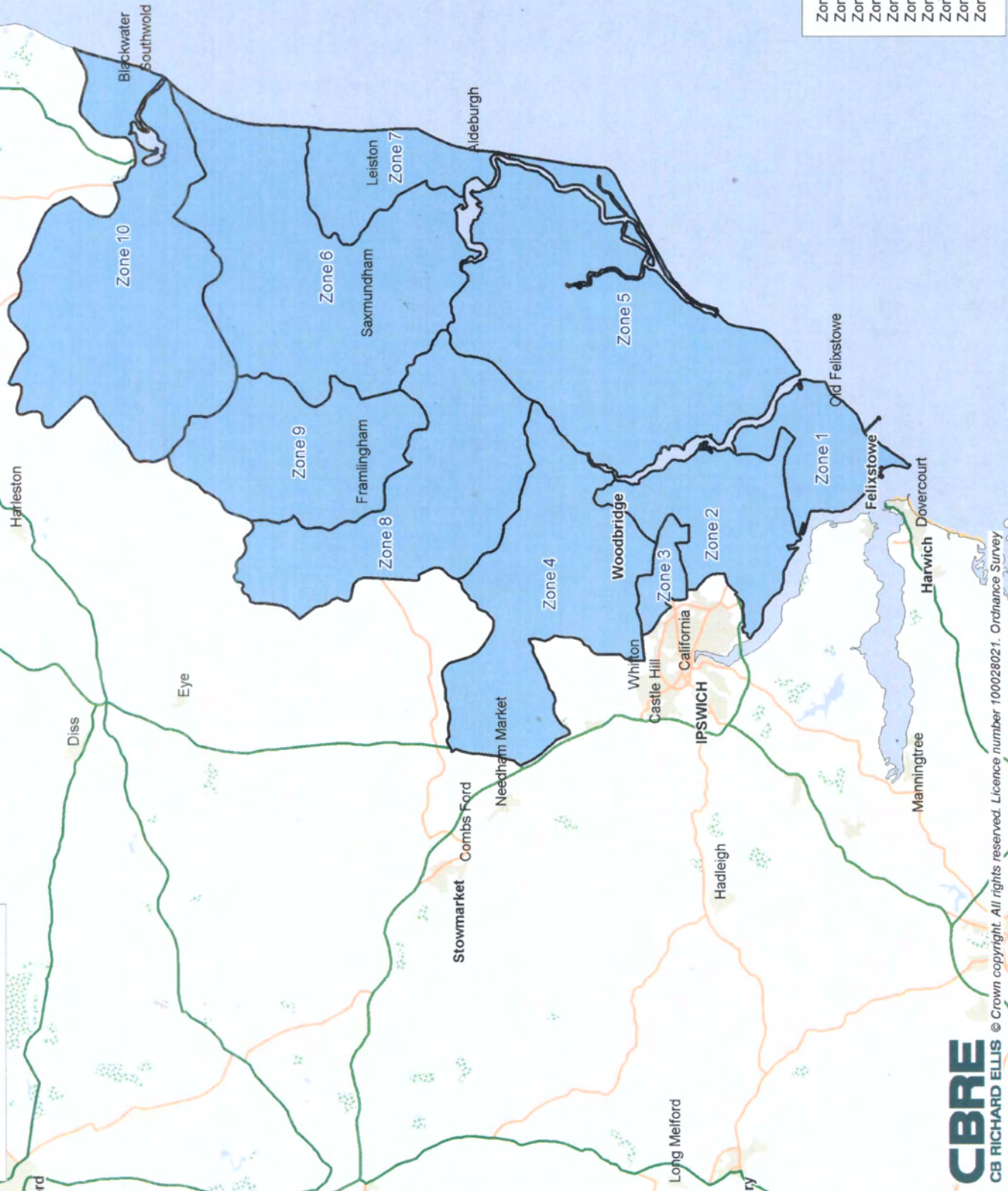
Framlingham

- 6.30** We consider that overall the centre remains vital and viable with a relatively balanced shopping provision overall. Vacancy rates are also low and good pedestrian movements were identified on market place.
- 6.31** Overall Framlingham has a sales density for convenience goods of approximately £5,045 sq m net which is broadly consistent with our estimate of a notional company average sales density for the main and local food stores within the town centre. The Co-op is the main provider of convenience goods and this is trading above its company average.
- 6.32** In terms of convenience floorspace capacity exists, based upon a constant market share, for about 68 sq m net by 2013 rising to 137 sq m net by 2018, 210 sq m net by 2023 and 240 sq m net by 2025.
- 6.33** Turning to comparison floorspace capacity exists for about 174 sq m net by 2013 rising to 375 sq m net by 2018, 631 sq m net by 2023 and 772 sq m net by 2025.

Ipswich Eastern Fringe

- 6.34** It is clear from our quantitative assessment that the Tesco at Kesgrave and Martlesham Heath and the Sainsbury's at Warren Heath continue to draw considerably from the survey area, 70%, 13% and 16% respectively. Overall, these three foodstores account for 34% of the convenience goods trade from the defined survey area. These easily accessible free standing foodstores will continue to be attractive to shoppers but the opportunity does exist, subject to suitable sites becoming available/ assembled, to consolidate and enhance the existing convenience provision within the districts centres and reverse these trading patterns and increase the district's market share.

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

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY APRIL 2008

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	30,398	30,725	31,063	31,405	31,530
2	IP10 0; IP12 4	10,553	10,734	10,916	11,102	11,180
3	IP5 1/2/3	17,261	17,977	18,714	19,481	19,793
4	IP6 9; IP12 1; IP13 6	16,040	16,525	17,021	17,531	17,742
5	IP12 2/3	8,527	9,038	9,580	10,155	10,399
6	IP17 1/2/3	11,236	11,609	11,992	12,388	12,549
7	IP15 5; IP16 4	9,591	9,730	9,866	10,004	10,064
8	IP13 0; IP13 7	7,293	7,422	7,556	7,692	7,745
9	IP13 8; IP13 9	6,537	6,710	6,884	7,063	7,134
10	IP18 6; IP19 0/8/9	15,356	15,782	16,224	16,678	16,862
TOTAL		132,792	136,252	139,817	143,500	144,998

SOURCE: MapInfo Corporation data for Suffolk Coastal, April 2008 (2005 based population projections)

2008 & 2013 taken from MapInfo Projections. Population growth from 2013 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	1,830	1,000	1,800	-	-
2	IP10 0; IP12 4	1,070	360	360	-	-
3	IP5 1/2/3	1,070	360	360	-	-
4	IP6 9; IP12 1; IP13 6	1,490	580	180	-	-
5	IP12 2/3	470	-	-	-	-
6	IP17 1/2/3	1,130	-	-	-	-
7	IP15 5; IP16 4	1,030	400	-	-	-
8	IP13 0; IP13 7	470	-	-	-	-
9	IP13 8; IP13 9	990	-	-	-	-
10	IP18 6; IP19 0/8/9	470	-	-	-	-
TOTAL		10,020	2,700	2,700	0	0

SOURCE: Based on Table 2: Housing Supply 2008-2025 - Proposed Distribution, Suffolk Coastal District Council (2008)

(Housing supply data includes Allocations, Outstanding planning permissions and 'Urban Potential' data as well as proposed housing supply to be distributed among 'Key Service Centres', 'Local Service Centres and Other Villages' and 'Small Sites').

NOTES:

- 1) Occupancy at 2 people per unit (Private Sector Housing Renewal Strategy, August 2007, Suffolk Coastal District Council).
- 2) A total housing supply of 7,710 added, equating to a additional population of 15,420.
- 3) Housing distribution in Zone 1 includes Felixstowe and The Trinleys Peninsula.
- 4) Proposed housing supply in the Ipswich Policy Area is split between Zone 2 (40%), Zone 3 (40%) and Zone 4 (20%).
- 5) All 'Outstanding planning permissions' and 'Urban potential' have been included in 2008 only.
- 6) Base date for all figures is 01/04/2008. All figures have been rounded.
- 7) All 'Outstanding planning permission' data has been discounted by 10% to account for development that may not materialise.
- 8) Housing supply for 'Small Sites' is extrapolated from annual consents 2002-2007 but discounted in anticipation of reducing opportunities.

TABLE 1B
POPULATION GROWTH RATES

	GROWTH RATES		
	2008-2013 (%)	2008-2018 (%)	2008-2025 (%)
1	1.1	2.2	3.3
2	1.7	3.4	5.2
3	4.1	8.4	12.9
4	3.0	6.1	9.3
5	6.0	12.4	19.1
6	3.3	6.7	10.3
7	1.4	2.9	4.3
8	1.8	3.6	5.5
9	2.6	5.3	8.1
10	2.8	5.7	8.6
TOTAL	2.6	5.3	8.1
			9.2

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	32,228	33,583	35,752	36,145	36,290
2	IP10 0; IP12 4	11,623	12,181	12,748	12,964	13,055
3	IP5 1/2/3	18,331	19,443	20,600	21,444	21,787
4	IP6 9; IP12 1; IP13 6	17,530	18,636	19,375	19,956	20,196
5	IP12 2/3	8,997	9,537	10,109	10,716	10,973
6	IP17 1/2/3	12,366	12,774	13,196	13,631	13,808
7	IP15 5; IP16 4	10,621	11,170	11,326	11,485	11,554
8	IP13 0; IP13 7	7,763	7,903	8,045	8,190	8,247
9	IP13 8; IP13 9	7,527	7,723	7,923	8,130	8,211
10	IP18 6; IP19 0/8/9	15,826	16,269	16,725	17,193	17,382
TOTAL		142,812	149,217	155,798	159,854	161,503

SOURCE: Based on Table 1A and 1B: MapInfo Corporation data for Suffolk Coastal; April 2008 (2005 based population projections) AND Housing Supply 2008-2025 - Proposed Distribution, including Allocations, Outstanding planning permissions and 'Urban Potential' data.

NOTES:

- Population growth from 2013 based on previous 5 year growth rate. 2023-2025 population grown at 2 year growth rate
 1) Occupancy at 2 people per unit (Private Sector: Housing Renewal Strategy, August 2007, Suffolk Coastal District Council).
 2) A total housing supply of 7,710 added, equating to a additional population of 15,420.
 3) Housing distribution in Zone 1 includes Felixstowe and The Trimleys Peninsula.
 4) Proposed housing supply in the Ipswich Policy Area is split between Zone 2 (40%), Zone 3 (40%) and Zone 4 (20%).
 5) All 'Outstanding planning permissions' and 'Urban potential' have been included in 2008 only.
 6) Base date for all figures is 01/04/2008. All figures have been rounded.
 7) All 'Outstanding planning permission' data has been discounted by 10% to account for development that may not materialise.
 8) Housing supply for 'Small Sites' is extrapolated from annual consents 2002-2007 but discounted in anticipation of reducing opportunities.

TABLE 2
SURVEY AREA RETAIL EXPENDITURE FORECASTS (2005 prices)

PER CAPITA EXPENDITURE IN		2005	2008	2013	2018	2023	2025		
		(£)	(£)	(£)	(£)	(£)	(£)		
Convenience Goods		1,498	1,543	1,622	1,705	1,792	1,828		
Comparison Goods		2,668	3,097	3,934	4,997	6,347	6,984		
GROWTH IN PER CAPITA RETAIL EXPENDITURE:									
Convenience Goods:		0.01 % pa '2005-2025							
Comparison Goods:		4.90 % pa '2005-2025'							
Catchment Zone		CONVENIENCE GOODS				COMPARISON GOODS			
		2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)
1		49,743	54,478	60,956	64,770	99,812	132,111	178,649	229,420
2		17,940	19,760	21,734	23,231	35,997	47,917	63,699	82,287
3		28,294	31,540	35,122	38,427	56,772	76,485	102,935	136,111
4		27,057	30,232	33,034	35,760	54,291	73,312	96,815	126,665
5		13,887	15,471	17,236	19,202	27,864	37,517	50,514	68,014
6		19,087	20,722	22,498	24,426	38,298	50,252	65,937	86,519
7		16,393	18,120	19,311	20,580	32,894	43,941	56,595	72,895
8		11,982	12,820	13,716	14,676	24,042	31,089	40,200	51,982
9		11,618	12,528	13,509	14,568	23,311	30,380	39,593	51,599
10		24,427	26,392	28,515	30,809	49,014	64,001	83,572	109,127
TOTAL		220,428	242,062	265,631	286,448	442,295	587,006	778,511	1,014,618
					295,220				1,128,003

SOURCE: Table 1, MapInfo Corporation data for Suffolk Coastal, April 2008

- NOTES:**
 1) Special Forms of trading removed for convenience goods at 1.7% and comparison at 5.8% (MapInfo Exp Explanatory Volume 2003 (Table 2))
 2) Convenience growth 2005-2022 at 1% per annum (MapInfo 07/02 Tables 1 & 3 (short term trend 0.9% per annum (1998-2006)).
 3) Comparison growth 2005-2006 at 5.5% per annum (MapInfo 07/02 Table 1). 2006 - 2021 growth at 4.9% per annum (MapInfo 07/02 Table 3 (long term trend 4.9% per annum (1978-2006)).

SUFFOLK COASTAL DISTRICT COUNCIL
RETAIL STUDY APRIL 2008

TABLE 3
FELIXSTOWE TOWN CENTRE DRAW FROM THE CATCHMENT AREA

Baseline																														
SCENARIO ONE:																														
Catchment Zone	CO-OP SOLAR					TESCO METRO					CONVENIENCE GOODS					OTHER CONVENIENCE					TOTAL					COMPARISON GOODS				
	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	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	6	5	5	5	5	0	0	0	1	1	0	1	1	1	1	6	6	6	6	6	14	14	14	14	14					
3	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					
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					
Suffolk Coastal Household Survey (March 2003)																														
SOURCE:																														

TABLE 4
FORECAST RETAIL SALES FELIXSTOWE TOWN CENTRE (2008 prices)

As Table 3																														
SCENARIO:																														
RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE																														
Catchment Zone	CO-OP SOLAR					TESCO METRO					CONVENIENCE GOODS					OTHER CONVENIENCE					TOTAL					COMPARISON GOODS				
	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	10,782	11,808	13,212	14,039	14,378	8,332	9,125	10,210	10,849	11,111	4,489	4,917	5,501	5,845	5,987	23,603	25,850	28,924	30,733	31,476	48,815	61,985	83,793	107,606	118,883					
2	870	968	1,054	1,127	1,157	0	0	0	0	0	251	277	304	325	334	1,121	1,235	1,358	1,452	1,492	5,028	6,693	8,998	11,494	12,736					
3	0	0	0	0	0	325	363	404	442	458	92	103	114	125	129	417	465	518	567	587	1,998	2,692	3,622	4,790	5,355					
4	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	260	351	464	607	676					
5	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	612	824	1,109	1,493	1,682					
6	0	0	0	0	0	0	0	0	0	0	124	135	146	159	164	124	135	146	159	164	141	152	163	176	184					
7	53	69	83	67	69	0	0	0	0	0	111	121	130	139	143	164	181	193	206	211	211	282	363	468	518					
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	398	515	666	861	954					
9	375	404	436	470	484	0	0	0	0	0	0	0	0	0	0	375	404	436	470	484	130	169	220	287	319					
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	12,080	13,229	14,765	15,702	16,088	8,657	9,488	10,614	11,291	11,569	5,067	5,553	6,196	6,593	6,757	26,805	28,270	31,575	33,586	34,415	55,559	73,630	99,319	127,847	141,393					
Tables 2 & 3																														
SOURCE:																														

TABLE 5
FUTURE SHOP FLOORSPACE CAPACITY IN FELIXSTOWE TOWN CENTRE

As Table 3														
SCENARIO:														
GROWTH IN SALES PER SQ M	CONVENIENCE GOODS					COMPARISON GOODS					2.5 %pa '08-'21			
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025	2008	2013	2018	2023
Residents*	25,805	28,270	31,575	33,586	34,415	55,559	73,630	99,319	127,847	141,393				
Spending £000	3,333	3,333	3,333	3,333	3,333	11,900	11,900	11,900	11,900	11,900				
Existing shop floorpace (sq m net)	7,741	6,006	6,006	6,006	6,006	4,669	5,282	5,976	6,762	7,104				
per sq m net £	25,805	20,021	20,021	20,021	20,021	95,559	62,860	71,120	80,466	84,539				
Support new shops (£000)	0	8,249	11,554	13,555	14,393	0	10,771	28,199	47,381	56,854				
Sales per sq m	0	10,000	10,000	10,000	10,000	4,500	5,091	5,760	6,203	6,203				
Capacity for new floorpace (sq m net)	0	825	1,155	1,356	1,439	0	2,115	4,895	7,638	9,155				
Table 4, 5a, 5b														
Comparison growth in turnover efficiency 2008-2021 at 2.5% per annum														
SOURCE:														

TABLE 5a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Floorplate (sqm)	Net GFA Ratio (%)	Co Average Sales (£ per sq m net)	Average Turnover (£000/sq)
Co-Op Solar	1,970	100%	5,239	10,321
Tesco Metro	473	95%	449	5,588
Other	914	100%	914	4,113
TOTAL	3,357		6,006	20,021

SOURCE: Suffolk Coastal District Council 2008
*Weighted on Co-Op Retailers' Verdict Research Limited, January 2007
UK Retail Rankings 2007, Mintel CB Richard Estimate
IGD 2008

TABLE 5b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

Store	Net Floorplate (sqm)	Net GFA Ratio (%)	Co Average Sales (£ per sq m net)	Average Turnover (£000/sq)
Co-Op Solar	1,970	100%	5,239	10,321
Tesco Metro	473	95%	449	5,588
Other	914	100%	914	4,113
TOTAL	3,357		6,006	20,021

SOURCE: Suffolk Coastal District Council 2008
*Weighted on Co-Op Retailers' Verdict Research Limited, January 2007
UK Retail Rankings 2007, Mintel CB Richard Estimate
IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY APRIL 2008

TABLE 6
FELIXSTOWE OUT OF CENTRE DRAW FROM THE CATCHMENT AREA
SCENARIO ONE: Baseline

Catchment Zone	PROPORTION OF SPENDING ATTRACTED TO FELIXSTOWE OUT OF CENTRE CONVENIENCE GOODS				
	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
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

Suffolk Household Survey (March 2003)

SOURCE:

TABLE 8
FUTURE SHOP FLOORSACE CAPACITY IN FELIXSTOWE OUT OF CENTRE
SCENARIO: As Table 6

	CONVENIENCE GOODS			
	2008	2013	2018	2025
Residents'				
Spending £000	14,941	16,374	18,291	19,450
Existing shop floorspace (sq m net)	1,696	1,696	1,696	1,696
Sales				
per sq m net £	8,811	11,130	11,130	11,130
Sales from extg firepce (£000)	14,941	18,874	18,874	18,874
Residual spending support new shops (£000)	0	-2,500	-583	576
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000
Capacity for new floorspace (sq m net)	0	-250	-58	58

Table 7

SOURCE:

TABLE 8a
OUT OF CENTRE CONVENIENCE GOODS FLOORSACE

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

Accessible Retail/Verdict(2007)

SOURCE:

TABLE 7
FORECAST RETAIL SALES FELIXSTOWE OUT OF CENTRE (2005 prices)
SCENARIO: As Table 6

Catchment Zone	RETAIL SALES IN OUT OF CENTRE BY CATCHMENT ZONE CONVENIENCE GOODS MORRISONS, GRANGE FARM AVE.				
	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	13,488	14,750	16,504	17,536	17,961
2	1,381	1,521	1,674	1,789	1,838
3	92	103	114	125	129
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	14,941	16,374	18,291	19,450	19,827

Tables 2 & 6

SOURCE:

SUFFOLK COASTAL DISTRICT COUNCIL
RETAIL STUDY APRIL 2008

TABLE 9
WOODBRIDGE TOWN CENTRE DRAW FROM THE CATCHMENT AREA.

SCENARIO ONE													
Baseline													
PORTION OF SPENDING ATTRACTED TO WOODBRIDGE TOWN CENTRE													
Catchment Zone	BUDGETS				CO-OP				OTHER				TOTAL
	2008	2013	2018	2025	2008	2013	2018	2025	2008	2013	2018	2025	
1	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
3	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
5	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
7	0	0	0	0	0	0	0	0	0	0	0	0	0
8	0	0	0	0	0	0	0	0	0	0	0	0	0
9	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
SOURCE: Suffolk Coastal Household Survey (March 2003)													

TABLE 10
FORECAST RETAIL SALES WOODBRIDGE TOWN CENTRE (2005 prices)

SCENARIO: As Table 9																										
RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE																										
Catchment Zone	BUDGETS				CO-OP				CONVENIENCE GOODS				OTHER				TOTAL				COMPARISON GOODS					
	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]	2008 [£000]	2013 [£000]	2018 [£000]	2023 [£000]		
1	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	15	19	26	33		
2	1,529	1,685	1,853	1,980	659	726	759	854	877	597	657	723	712	753	3,274	3,507	3,705	6,452	8,559	11,417	14,749	16,343	17,479	18,343	19,069	
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	3,756	5,051	6,811	9,006	10,681	12,377	14,177		
4	2,963	3,310	3,617	3,916	1,035	1,156	1,264	1,368	1,412	1,897	2,109	2,304	2,494	2,575	7,185	7,778	8,029	12,239	16,526	21,824	28,553	31,797	34,952	38,107		
5	979	1,091	1,215	1,354	587	654	728	811	847	656	731	814	907	948	2,475	2,748	3,029	6,728	9,059	12,197	16,422	18,504	20,586	22,668		
6	0	0	0	0	0	0	0	0	0	172	187	202	220	227	172	187	202	1,948	2,556	3,354	4,400	4,905	5,410	5,915		
7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	686	916	1,180	1,520	1,863	2,206	2,549		
8	0	0	0	0	611	654	700	748	769	261	279	298	319	328	872	988	1,068	2,382	3,056	3,986	5,066	5,986	6,906	7,826		
9	0	0	0	0	0	0	0	0	0	258	279	301	324	335	370	400	420	3,127	4,205	5,480	7,142	8,423	9,704	10,985		
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		
TOTALS	5,471	6,086	6,685	7,250	7,491	2,969	3,262	3,568	3,865	3,992	3,831	4,241	4,643	5,037	12,261	13,588	14,895	37,355	48,912	66,145	86,811	106,800	126,793	146,786	166,779	
Table 2 & 3																										
SOURCE:																										

TABLE 11
FUTURE SHOP FLOORSPACE CAPACITY IN WOODBRIDGE TOWN CENTRE

SCENARIO: As Table 9													
GROWTH IN SALES PER SQ M													
	CONVENIENCE GOODS				COMPARISON GOODS				2.5 % per 100/21				
	2008	2013	2018	2025	2008	2013	2018	2025	2008	2013	2018	2025	
Residents*	12,261	13,588	14,895	16,152	16,688	37,355	49,912	65,145	86,811	95,800	105,800	115,800	125,800
Spending £000	1,902	1,902	1,902	1,902	1,902	5,693	5,693	5,693	5,693	5,693	5,693	5,693	5,693
Existing shop floor space (sq m net)	6,446	4,972	4,972	4,972	4,972	6,542	7,424	8,359	9,503	9,503	9,503	9,503	9,503
Sales per sq m net £	12,261	9,456	9,456	9,456	9,456	37,355	42,264	47,818	54,102	56,841	59,584	62,327	65,070
Residual spending (sq m net)	0	4,132	5,440	6,696	7,232	0	7,648	18,326	32,710	39,960	47,213	54,466	61,719
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,500	5,091	5,760	6,203	6,203	6,203	6,203	6,203
Capacity for new floor space (sq m net)	0	413	544	670	723	0	1,502	3,181	5,273	6,442	7,611	8,780	9,949
Less New Development (sq m net)	0	0	0	0	0	0	0	0	0	0	0	0	0
Capacity for new floor space (sq m net)	0	413	544	670	723	0	1,502	3,181	5,273	6,442	7,611	8,780	9,949
SOURCE: Table 10													

TABLE 11a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Floor (sqm)	Net Con Ratio (%)	Net Convenience (sqm)	Co Average Sales (per sq m net)	Average Turnover (£000s)
Budgets	1,055	100%	1,055	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

Suffolk Coastal District Council 2008
*Yield on Grocery Retailers: Vendor Research Limited, January 2007.
UK Retail Ranking 2007, Mintel, CB Richard Estimation 2006.
RD 2006

TABLE 11b
TOWN CENTRE COMPARISON GOODS FLOORSPACE

Store	Net Floor (sqm)	Net Comparison Goods (sqm)
Total Comparison Goods		5,693

Suffolk Coastal District Council 2008
RD 2006

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY APRIL 2008

TABLE 12
ALDBURGH TOWN CENTRE DRAWN FROM THE CATCHMENT AREA

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

Suffolk Coastal Household Survey (March 2003)

TABLE 13
FORECAST RETAIL SALES ALDBURGH TOWN CENTRE (2000 prices)

Catchment Zone	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					OTHER				
	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
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	1,119	1,237	1,318	1,405	1,441	377	417	444	473	486
8	0	0	0	0	0	0	0	0	0	0
9	0	0	0	0	0	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0
TOTALS	1,119	1,237	1,318	1,405	1,441	600	666	717	768	790

Tables 2 & 12

TABLE 14
FUTURE SHOP FLOORS CAPACITY IN ALDBURGH TOWN CENTRE

SCENARIO:	COMPARISON GOODS									
	CONVENIENCE GOODS					2.5 %pa '08-21				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents*	1,719	1,903	2,035	2,173	2,232	2,371	3,157	4,107	5,330	5,917
Spending £000	670	670	670	670	670	1,576	1,576	1,576	1,576	1,576
Existing shop floorspace (sq m net)	2,566	4,743	4,743	4,743	4,743	1,505	1,702	1,926	2,179	2,290
Sales per sq m net (£/yr)	1,719	3,178	3,178	3,178	3,178	2,371	2,683	3,036	3,435	3,608
Residual spending support new shops (£000)	0	-1,275	-1,143	-1,005	-946	0	474	1,071	1,895	2,309
Sales per sq m net in new shops (£/yr)	10,000	10,000	10,000	10,000	10,000	4,000	4,526	5,120	5,614	5,614
Capacity for new floorspace (sq m net)	0	-127	-114	-100	-95	0	105	209	344	419

Table 13
Comparison growth in turnover efficiency 2008-2021 at 2.5% per annum

TABLE 14a
TOWN CENTRE CONVENIENCE GOODS FLOORS SPACE

Store	Net Floor Space (sqm)	Net Con Ratio (%)	Net Convenience Floor Space (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	2,026
AVERAGE			670	4,743	3,178

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

TABLE 14b
TOWN CENTRE CONVENIENCE GOODS FLOORS SPACE

Net Floor Space (sqm)	Net Floor Space (sqm)
	1,576
Total Comparison Goods	

SOURCE: Suffolk Coastal District Council 2008/IGD

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY APRIL 2008

TABLE 15
SAXMUNDHAM TOWN CENTRE DRAW FROM THE CATCHMENT AREA.
SCENARIO ONE: Baseline

Catchment Zone	PROPORTION OF SPENDING ATTRACTED TO SAXMUNDHAM TOWN CENTRE										COMPARISON GOODS				
	SOMERFIELD					OTHER					TOTAL				
	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
2	1	1	1	1	1	0	0	0	0	0	1	1	1	1	1
3	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
5	6	6	6	6	6	0	0	0	0	0	6	6	6	6	6
6	51	51	51	51	51	4	4	4	4	4	55	55	55	55	55
7	19	19	19	19	19	1	1	1	1	1	20	20	20	20	20
8	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
9	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

Suffolk Coastal Household Survey (March 2003)

TABLE 16
FORECAST RETAIL SALES SAXMUNDHAM TOWN CENTRE (2005 prices)
SCENARIO: As Table 15

Catchment Zone	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE										COMPARISON GOODS				
	SOMERFIELD					OTHER					TOTAL				
	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
2	161	178	196	209	215	0	0	0	0	0	161	178	196	209	215
3	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4	162	181	198	215	222	0	0	0	0	0	162	181	198	215	222
5	837	932	1,038	1,157	1,208	0	0	0	0	0	837	932	1,038	1,157	1,208
6	9,687	10,517	11,418	12,396	12,810	840	912	990	1,075	1,111	10,526	11,428	12,408	13,471	13,920
7	3,168	3,502	3,732	3,977	4,081	111	122	130	139	143	3,279	3,624	3,862	4,116	4,224
8	0	0	0	0	0	68	66	66	66	66	68	66	66	66	66
9	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
10	397	429	463	501	516	0	0	0	0	0	397	429	463	501	516
TOTALS	14,466	15,796	17,107	18,620	19,120	1,058	1,149	1,244	1,346	1,389	15,524	16,946	18,351	19,866	20,509

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									
	2.5 %pa '05-'22					COMPARISON GOODS				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents' Spending (£000)	15,524	16,946	18,351	19,866	20,509	5,822	7,399	9,708	12,732	14,191
Existing shop floor space (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 (£)	8,419	9,244	10,000	10,785	11,128	3,546	4,505	5,918	7,819	8,648
Sales from extg floor space (£000)	15,524	16,946	18,351	19,866	20,509	5,822	7,399	9,708	12,732	14,191
Residual spending support new shops (£000)	0	0	0	0	0	0	0	0	0	0
Sales per sq m net in new shops (£)	0	0	0	0	0	0	0	0	0	0
Capacity for new floor space (sq m net)	0	0	0	0	0	0	0	0	0	0

SOURCE: Table 16
Completion growth in turnover efficiency 2006-2021 at 2.5% per annum

TABLE 17a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Floor (sqm)	Net Con Ratio (%)	Convenience Floor (sqm)	Co Average Sales (per sq m net)	Average Turnover (£000/sq)
Church Street, 6 units (not implemented)	600	85%	510	4,500	2,295
Somerfield	743	95%	706	5,311	3,805
Other	628	100%	628	4,500	2,876
AVERAGE			1,844	4,841	8,976

SOURCE: Suffolk Coastal District Council
Occupiers of Church Street unknown. Turnover per sqm based upon "other" operators.
Verdict on Goosey 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 Floor (sqm)	Net Comparison Goods
1,641	1,641
Total Comparison Goods	
SOURCE: Suffolk Coastal District Council 2008 IGD 2008	

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY/APRIL 2008

TABLE 18
LEISTON TOWN CENTRE DRAW FROM THE CATCHMENT AREA
SCENARIO ONE: Baseline

Catchment Zone	PROPORTION OF SPENDING ATTRACTED TO LEISTON TOWN CENTRE									
	CO-OP SOLAR					CONVENIENCE GOODS				
	2008 (%)	2013 (%)	2018 (%)	2025 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	0	0	0	0	0	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	6	6	6	6	6	1	1	1	1	1
7	48	48	48	48	48	3	3	3	3	3
8	0	0	0	0	0	0	0	0	0	0
9	2	2	2	2	2	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0
TOTAL	56	56	56	56	56	56	56	56	56	56
SOURCE:	Suffolk Coastal Household Survey (March 2003)									

TABLE 19
FORECAST RETAIL SALES LEISTON TOWN CENTRE (2005 prices)
SCENARIO: As Table 18

Catchment Zone	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE									
	CO-OP SOLAR					CONVENIENCE GOODS				
	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
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	0	0	0	0	0	0	0	0	0	0
6	1,074	1,166	1,269	1,374	1,420	124	135	146	159	164
7	7,811	8,634	9,201	9,806	10,063	434	480	512	545	560
8	0	0	0	0	0	0	0	0	0	0
9	192	207	223	240	248	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0
TOTALS	9,077	10,006	10,690	11,421	11,731	558	615	658	704	724
SOURCE:	Tables 2 & 18									

TABLE 20
FUTURE SHOP FLOORS CAPACITY IN LEISTON TOWN CENTRE
SCENARIO: As Table 18

GROWTH IN SALES PER SQ M	COMPARISON GOODS									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents' Spending £000	9,035	10,621	11,348	12,125	12,455	8,481	11,282	14,617	18,932	21,002
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 £	8,364	9,762	10,421	11,156	11,455	3,084	4,099	5,315	6,899	7,636
Sales from extg floorspace (£000)	9,035	10,621	11,348	12,125	12,455	8,481	11,282	14,617	18,932	21,002
Residual spending support new shops (£000)	0	0	0	0	0	0	0	0	0	0
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,526	5,120	5,514	5,514
Capacity for new floorspace (sq m net)	0	0	0	0	0	0	0	0	0	0
TOTAL	0	0	0	0	0	0	0	0	0	0
SOURCE:	Table 19									

Comparison growth in turnover efficiency: 2008-2021 at 2.5% per annum

TABLE 20a

TOWN CENTRE CONVENIENCE GOODS FLOORSPACE						
Store	Net Floor Area (sqm)	Net Con Ratio (%)	Net Con Convenience Floor (sqm)	Net Sales per sq m net	Co Average Sales	Average Turnover (£000/s)
Co Op Solar	628	100%	628	5,239	5,239	3,290
Other	459	100%	459	4,500	4,500	2,066
AVERAGE			1,087	4,927		5,366

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 FLOORS/SPACE		Net Floor Space (sqm)
Total Comparison Goods		2,750

Suffolk Coastal District Council 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAIL STUDY APRIL 2008

TABLE 21
FRAMLINGHAM TOWN CENTRE DRAW FROM THE CATCHMENT AREA.

Catchment Zone	PROPORTION OF SPENDING ATTRACTED TO FRAMLINGHAM TOWN CENTRE									
	CO OP					OTHER CONVENIENCE GOODS				
	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)	2008 (%)	2013 (%)	2018 (%)	2023 (%)	2025 (%)
1	1	1	1	1	1	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	3	3	3	3	3	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	12	12	12	12	12	0	0	0	0	0
9	40	40	40	40	40	0	0	0	0	0
10	0	0	0	0	0	0	0	0	0	0
TOTAL	68	68	68	68	68	0	0	0	0	0

Suffolk Coastal Household Survey (March 2003)

TABLE 22
FORECAST RETAIL SALES FRAMLINGHAM TOWN CENTRE (2005 prices)

Catchment Zone	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE									
	CONVENIENCE GOODS					OTHER				
	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)	2008 (£000)	2013 (£000)	2018 (£000)	2023 (£000)	2025 (£000)
1	398	436	488	518	531	0	0	0	0	0
2	0	0	0	0	0	0	0	0	0	0
3	0	0	0	0	0	0	0	0	0	0
4	0	0	0	0	0	0	0	0	0	0
5	347	387	431	480	501	0	0	0	0	0
6	0	0	0	0	0	0	0	0	0	0
7	0	0	0	0	0	0	0	0	0	0
8	1,486	1,590	1,701	1,820	1,869	0	0	0	0	0
9	4,824	5,377	5,974	6,574	6,848	0	0	0	0	0
10	104	112	121	131	135	0	0	0	0	0
TOTALS	6,959	7,511	8,117	8,747	9,010	1,062	1,145	1,234	1,329	1,369

Tables 2 & 21

TABLE 23
FUTURE SHOP FLOORSPACE CAPACITY IN FRAMLINGHAM TOWN CENTRE

Scenario	COMPARISON GOODS									
	CONVENIENCE GOODS					COMPARISON GOODS				
	2008	2013	2018	2023	2025	2008	2013	2018	2023	2025
Residents*	8,021	8,655	9,351	10,076	10,380	4,506	5,888	7,687	10,006	11,116
Spending £000										
Existing shop floor space	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	5,045	5,018	5,018	5,018	5,018	2,492	2,820	3,191	3,610	3,753
Sales from extg floor space (£000)	8,021	7,979	7,979	7,979	7,979	4,506	5,099	5,769	6,527	6,857
Residual spending										
Support new shops (£000)	0	676	1,372	2,087	2,401	0	789	1,918	3,479	4,259
Sales per sq m net in new shops (£)	10,000	10,000	10,000	10,000	10,000	4,000	4,525	5,120	5,514	5,514
Capacity for new floor space (sq m net)	0	68	137	210	240	0	174	375	631	772

Table 22
Completion growth in turnover efficiency 2008-2011 at 2.5% per annum

TABLE 23a
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Floor Space (sqm)	Net Con Ratio (%)	Net Convenience Floor (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 Oncoy Retailers, Verdict Research Limited, January 2007.
UK Retail Rankings 2007, Mintel, CB Richard Estimates 2008.
IGD 2008

TABLE 23b
TOWN CENTRE CONVENIENCE GOODS FLOORSPACE

Store	Net Floor Space (sqm)	Net Con Ratio (%)	Net Convenience Floor (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
IGD 2008

SUFFOLK COASTAL DISTRICT COUNCIL

RETAL STUDY APRIL 2008

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

Catchment Zone	TESCO, KESGRAVE					TESCO, MARTLESHAM HEATH					SAINSBURY'S, WARREN HEATH					TOTAL					COMPARISON GOODS RETAIL WAREHOUSES				
	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	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	4	4	4	4	4	50	50	50	50	50	14	14	14	14	14
5	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
6	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
7	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
8	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
9	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
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 25
FORECAST RETAIL SALES IPSWICH EASTERN FRINGE OUT OF CENTRE (2005 prices)
SCENARIO: As Table 21

Catchment Zone	RETAIL SALES IN TOWN CENTRE BY CATCHMENT ZONE																													
	CONVENIENCE GOODS										SAINSBURY'S, WARREN HEATH										TOTAL					RETAIL WAREHOUSES				
	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	62	68	76	81	83	3,569	3,902	4,374	4,647	4,760	3,743	4,099	4,587	4,922	4,992	7,374	8,076	9,037	9,602	9,834	10,064	13,308	17,996	23,110	28,532					
2	161	178	196	209	215	7,257	7,992	8,792	9,397	9,653	2,364	2,603	2,864	3,061	3,144	9,762	10,774	11,851	12,667	13,012	15,926	19,933	25,178	31,074						
3	9,323	10,392	11,573	12,662	13,123	10,943	12,198	13,593	14,862	15,403	2,157	2,406	2,678	2,930	3,037	22,423	24,986	27,834	30,453	31,562	11,821	15,926	21,434	28,342						
4	670	748	816	885	914	11,202	12,516	13,676	14,806	15,284	1,765	1,973	2,155	2,333	2,409	13,637	15,317	16,649	18,023	18,606	7,601	10,364	13,544	17,333						
5	49	54	60	67	70	7,826	8,718	9,712	10,820	11,303	490	545	608	677	707	8,363	9,317	10,380	11,564	12,080	4,410	5,937	7,994	10,764						
6	0	0	0	0	0	2,978	3,233	3,510	3,810	3,938	0	0	0	0	0	2,978	3,233	3,510	3,810	3,938	4,056	5,323	6,884	9,164						
7	0	0	0	0	0	2,107	2,329	2,481	2,644	2,714	320	353	377	401	412	2,426	2,682	2,858	3,046	3,126	3,865	5,163	6,850	9,482						
8	0	0	0	0	0	4,952	4,336	4,640	5,064	5,089	350	376	401	429	441	4,403	4,713	5,041	5,393	5,545	4,113	5,318	6,577	8,894						
9	0	0	0	0	0	2,615	2,864	3,136	3,430	3,476	147	158	171	185	191	3,272	3,582	3,901	4,220	4,357	3,328	4,328	5,459	6,832						
10	0	0	0	0	0	1,003	1,094	1,171	1,207	1,207	147	158	171	185	191	1,076	1,161	1,246	1,336	1,389	1,331	1,728	2,269	2,863						
TOTALS	10,265	11,441	12,722	13,804	14,404	53,146	58,699	64,509	69,987	72,313	12,094	13,330	14,722	15,841	16,311	76,506	83,469	91,563	99,732	103,028	54,778	72,930	96,309	126,567						
Table 2 & 21																														

TABLE 25a
IPSWICH EASTERN FRINGE CONVENIENCE GOODS FLOORSPACE

Store	Net Floor (sqm)	Net Con Ratio (%)	Net Con Convenience	Co Average Sales	Average Turnover
Tesco, Kesgrave	854	95%	811	11,338	9,199
Tesco, Martlesham Heath	3,620	59%	2,100	11,338	23,809
Sainsbury's, Warren Heath	5,913	69%	4,021	8,955	36,007
AVERAGE			6,932	9,965	89,010

SOURCE: RGD 'Verdict on Grocery Retailers', Verdict Research Limited, January 2007.
Assessable Floorspace (2007)

SUFFOLK COASTAL DISTRICT COUNCIL

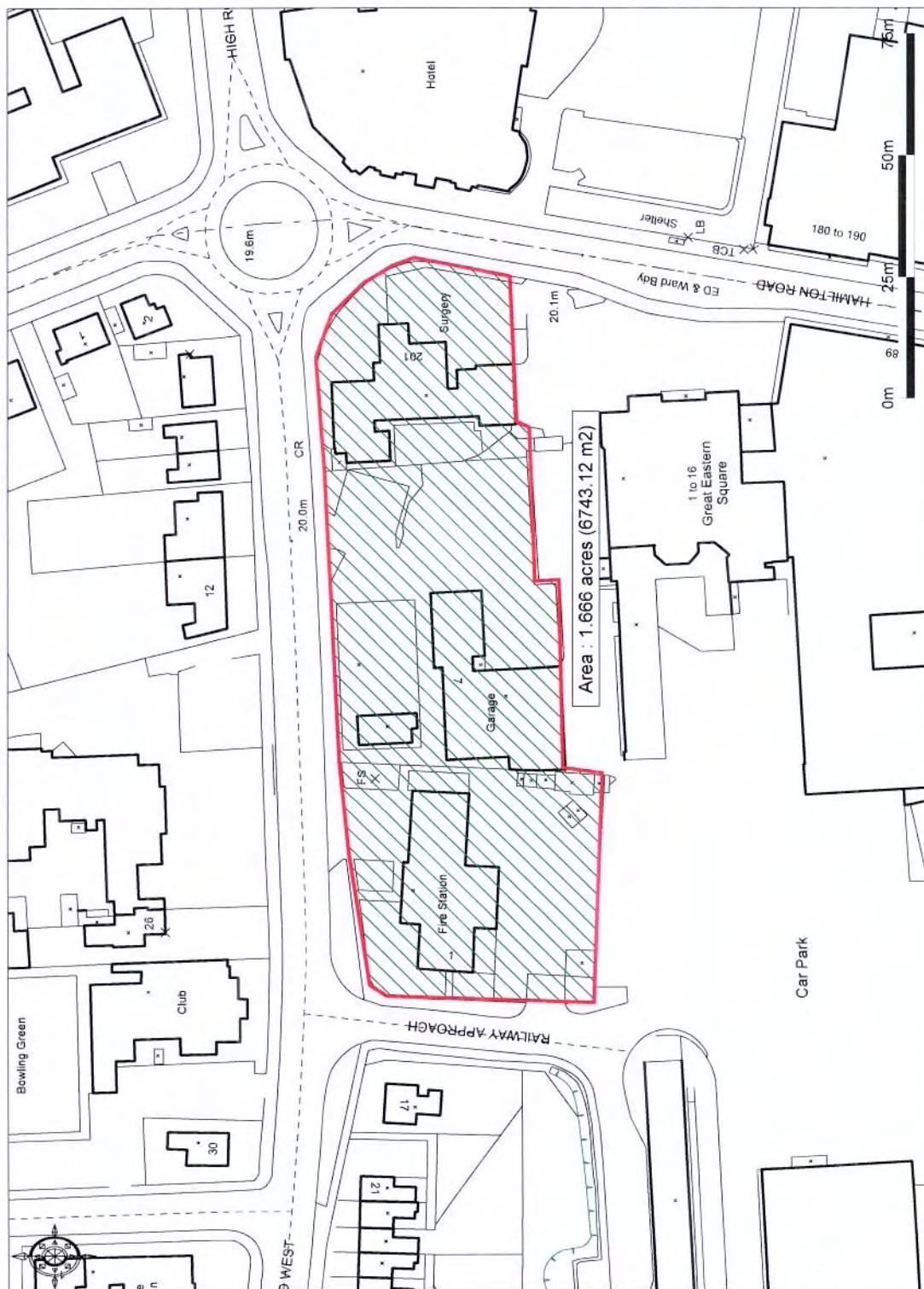
RETAIL STUDY APRIL 2008

TABLE 26
SUMMARY FUTURE SHOP FLOORSPACE CAPACITY TO 2021 (SQ M NET)

	Convenience (sq m net)	Comparison (sq m net)
Felixstowe	1,356	7,638
Woodbridge	670	5,272
Aldeburgh	-100	344
Saxmundham	1,094	833
Leiston	677	1,206
Framlingham	210	631

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

High Road West, Felixstowe



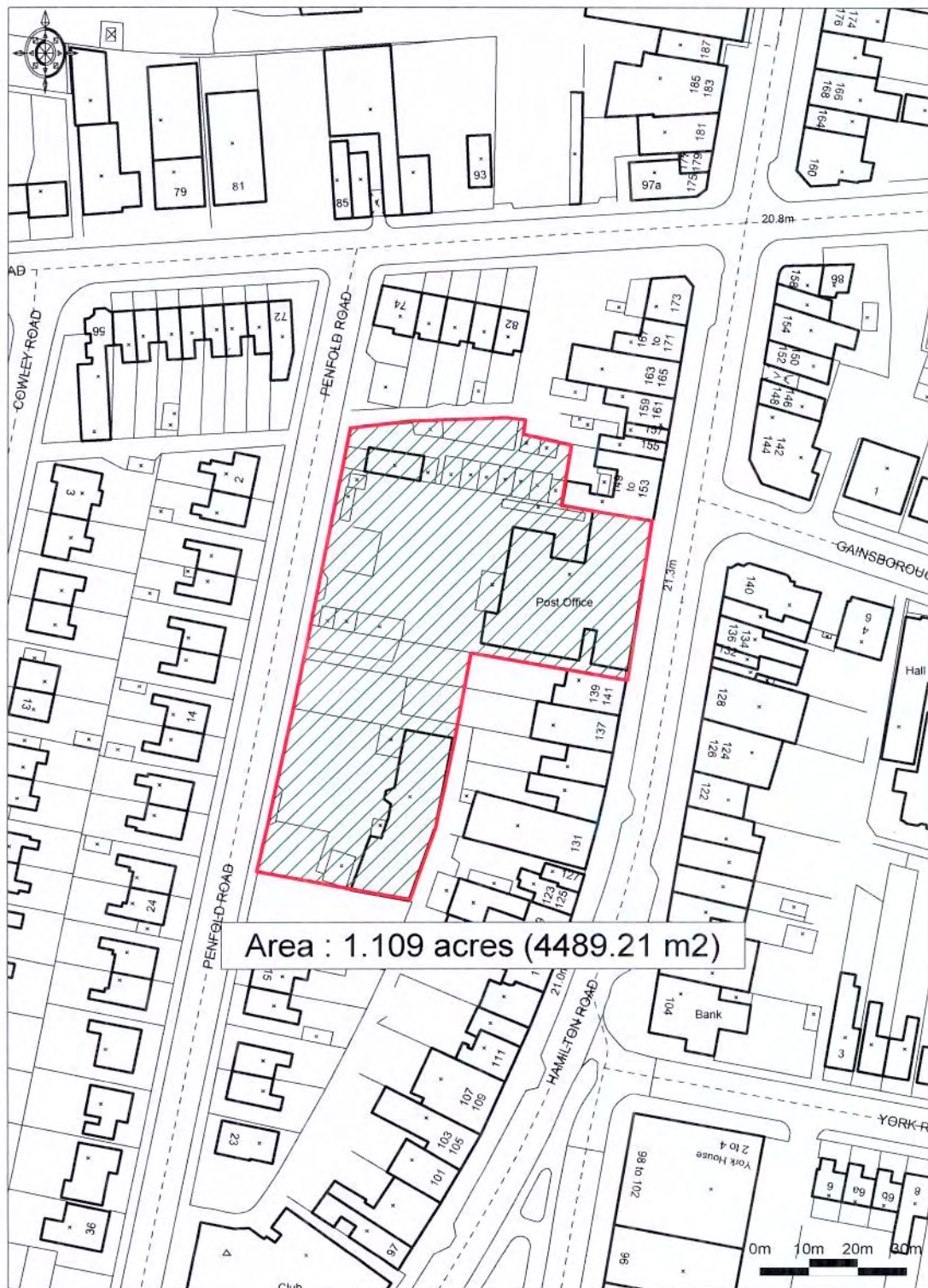
Land at St Andrews Road, Felixstowe



Area : 4.983 ha (12.314 acres)



143 - 147 Hamilton Road, Service Areas and Stores



Ordnance Survey

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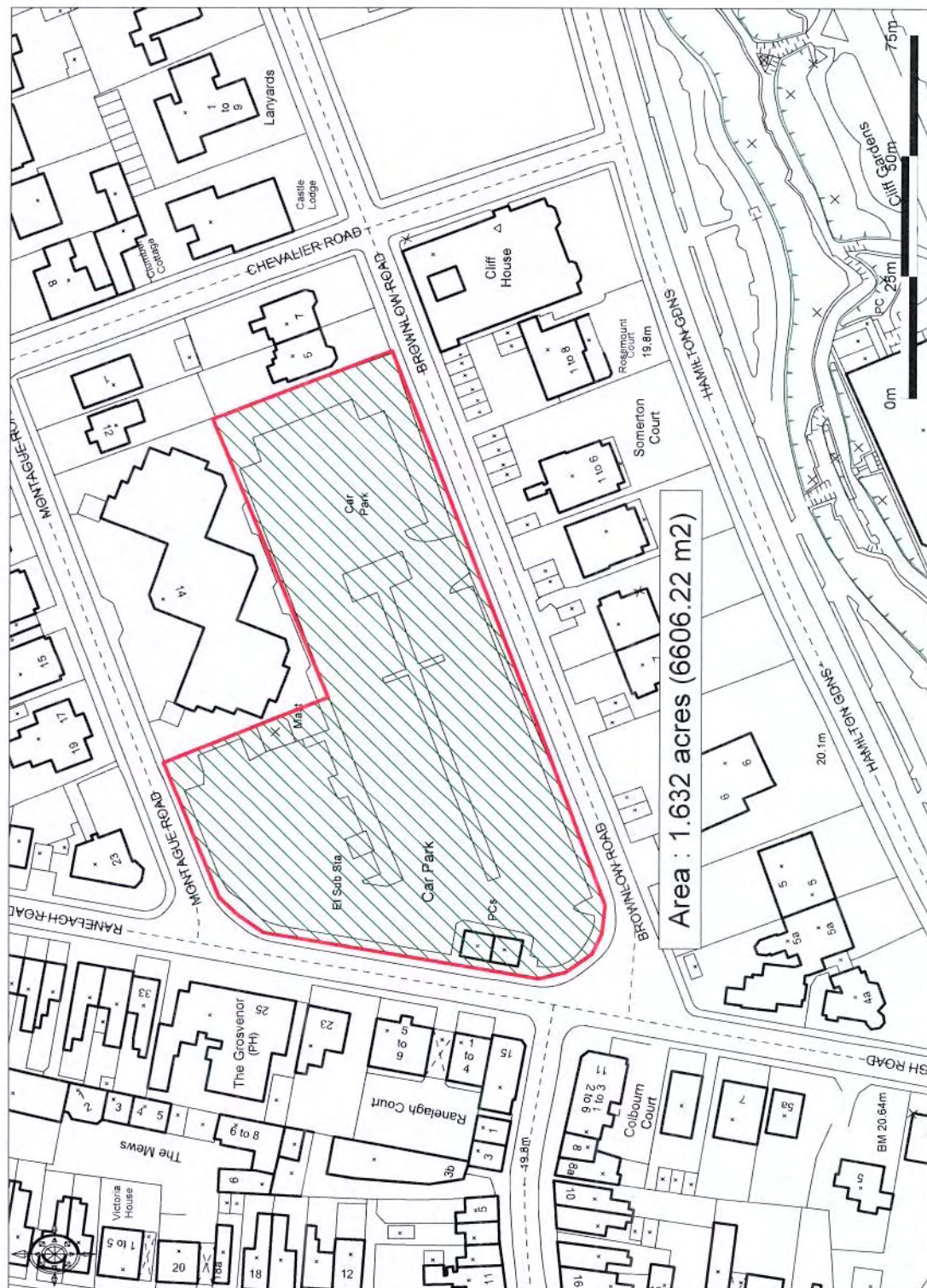
Land at the Corner of Hamilton Road and Cobbold Road, Felixstowe



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Ranelagh Road Car Park, Felixstowe



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TABLE 2: HOUSING SUPPLY 2008-2025 – PROPOSED DISTRIBUTION

	East of Ipswich	Rest of District	District Total	Catchment Zone
Ipswich Policy Area				
Outstanding planning permissions ¹	420	-		Primarily 3
Urban potential	180	-		2 and 3
<i>Allocations</i>	<i>1,050</i>	<i>-</i>		2
Felixstowe and Trimleys Peninsula				
Outstanding planning permissions ¹	-	160		1
Urban potential	-	260		1
<i>Allocations</i>	<i>-</i>	<i>1,660</i>		1
Aldeburgh				
Outstanding planning permissions ¹	-	70		7
Urban potential	-	50		7
<i>Allocations</i>	<i>-</i>	<i>0</i>		7
Framlingham				
Outstanding planning permissions ¹	-	110		9
Urban potential	-	150		9
<i>Allocations</i>	<i>-</i>	<i>0</i>		
Leiston				
Outstanding planning permissions ¹	-	90		7
Urban potential	-	70		7
<i>Allocations</i>	<i>-</i>	<i>200</i>		7
Saxmundham				
Outstanding planning permissions ¹	-	80		6
Existing Local Plan Allocation (East of Fromus)	-	150		6
Urban potential	-	100		6
<i>Allocations</i>	<i>-</i>	<i>0</i>		
Woodbridge				
Outstanding planning permissions ¹	-	320		4
Urban potential	-	40		4
<i>Allocations</i>	<i>-</i>	<i>200</i>		4
Key Service Centres				
Outstanding planning permissions ¹	-	250		All Zones
Existing Local Plan Allocation (Rendlesham)	-	120		
Urban potential	-	180		
<i>Allocations</i>	<i>-</i>	<i>200</i>		
Local Service Centres & Other Villages				
Outstanding planning permissions ¹	-	280		All zones
Urban potential	-	0		
<i>Allocations</i>	<i>-</i>	<i>0</i>		
Total Provision				
Small Sites ²	230	1090	1,320	All zones
Outstanding planning permissions ¹	420	1,360	1,780	
Existing Local Plan Allocations	0	270	270	
Urban potential	180	850	1,030	
<i>Allocations</i>	<i>1,050</i>	<i>2,260</i>	<i>3,310</i>	
	1,880	5,830	7,710	

Footnotes:

Base date for all figures is 01/04/2008. All Figures have been rounded

1 discounted by 10% to account for development that may not materialise;

2 extrapolation of annual consents 2002-2007 but discounted in anticipation of reducing opportunities