Suffolk Coastal

Retail Study

August 2003

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PLANS

APPENDICES

1. INTRODUCTION

1.1 CB Hillier Parker was instructed in December 2002 to undertake the Suffolk Coastal District Retail Study. The purpose of this study is to inform and guide retail planning in the District. In particular, the study will inform the preparation of the second review of the Suffolk Coastal Local Plan.

1.2 Our terms of reference are 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.
- Estimate the scale and nature of any changes in this position that may arise in the 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.
- Identify the scale and nature of additional retail provision that may be appropriate in the centres studied to the period 2016.
- Assess the scope for new retail development and the potential to accommodate this within the District.

1.3 In order to address Suffolk Coastal District Council's requirements, our methodology incorporates town centre health checks, a household telephone survey, retail capacity assessment, retail demand survey, and a review of potential development opportunities.

1.4 The town centre health checks draw on the performance indicators set out in Figure 1 of PPG6. These reviews inform the retail need assessment, highlighting the extent of any deficiencies in the range, choice and distribution of existing provision in the District. The quantitative capacity exercise draws on the household telephone survey to understand the current usage of the main shopping destinations in the District and inform the forecasts of future shop floorspace capacity. The Retail Study also considers the scope to accommodate further new retail development in the District. This includes assessing the suitability, viability and availability of sites for new development. The results of all the analysis are drawn together to provide a set of recommendations and advice on the Local Plan Review retail policies and proposals.

STRUCTURE

1.5 The next section of this report sets out our review of national, strategic and local planning policies relevant to retail planning in Suffolk Coastal District. Section 3 highlights current retail trends, focusing on the likely implications for retailing within Suffolk Coastal District. In Section 4 we review the Sub-Regional Context. This looks in particular at the retail hierarchy within the District and wider catchment area and provides an overview of competing centres within the wider vicinity. In Sections 5, 6 and 7 we present our qualitative assessment of the health of Felixstowe, Woodbridge, Aldeburgh, Saxmundham, Leiston, Framlingham and the Ipswich Eastern Fringe. In Section 8, we present our quantitative assessment for each town centre. Section 9 reviews development opportunities throughout the District. We draw together the findings of our work into a series of conclusions and recommendations in Section 10.

2. POLICY FRAMEWORK

2.1 In this section, we examine the key points of relevance from national planning policy guidance, regional planning policy guidance for the East Anglia region, the Suffolk Structure Plan 2001, and the Suffolk Coastal Local Plan.

PLANNING POLICY GUIDANCE: TOWN CENTRES AND RETAIL DEVELOPMENTS (PPG6, JUNE 1996)

2.2 National Planning Policy Guidance for town centres and retail developments set out in PPG6 provides the framework for developing Local Plan shopping policies which are then tailored to the specific circumstances of Suffolk Coastal District. The broad thrust of the policy is to, wherever possible, sustain and enhance existing centres, and to plan positively for new development within existing town and district centres, consistent with their respective roles and the needs of their catchments.

2.3 Within the context of the Structure Plan retail hierarchy, Local Plans are to consider existing provision and identify sites for development, working with the private sector to assess need or market demand. Where site assembly is necessary, the plan should indicate the action the local planning authority will take to accelerate the process. Depending on local circumstances, it may be appropriate to designate areas of the town centre for retaining or enhancing the provision of particular uses, such as shopping, leisure, entertainment, education, health or employment.

2.4 PPG6 makes it clear that local authorities should consider the need for new development as part of the development plan process, and are only required to identify sites for development where they consider there is a need during the Local Plan period. Need was subsequently clarified as being an appropriate test in development control decisions in the then Planning Minister's answer to a Parliamentary Question in February 1999, when Richard Caborn stated: -

> *"Proposals for new retail and leisure development which accord with an up to date development plan strategy or are proposed on sites within an existing centre should not be required to demonstrate that they satisfy the need test because this should have been taken into account in the development plan. However, proposals which will be located at an edge of centre or out of centre location, and which:*

- *Are not in accordance with an up to date development plan strategy; or*
- *Are in accordance with the development plan but that plan is out of date, is inconsistent with national planning policy guidance or otherwise fails to establish adequately the need for new retail and leisure development and other developments to which PPG6 applies;*
- *Should be required to demonstrate both a need for additional facilities and that a sequential approach has been applied in selecting the location of the site."*

2.5 While not explicitly defining need, the Minister stated that interpretation of need was to be determined by the decision-maker, reflecting that judgement should be applied in assessing not only the scale of proposals, but also their particular characteristics and the particular circumstances of the area to which the need applies.

2.6 The First Secretary of State recently clarified the Government's planning policy on town centres and retail development, in a statement of 10th April 2003. This was an attempt to draw together current Government guidance and previous statements.

2.7 The statement of 10th April 2003 made specific comments on need. The First Secretary of State accepts that need can be expressed in quantitative and qualitative terms but considers that evidence presented on need is becoming increasingly and unnecessarily complicated. The First Secretary of State therefore clarified that he places greater weight on quantitative need for new retail provision to be determined in terms of additional floorspace for the types of retail development distinguished in PPG6, which are comparison and convenience shopping.

2.8 PPG6 states that after considering need, local planning authorities and developers should adopt a sequential approach to site selection for new retail development and key town centre uses. It is the Government's preference for retail development to take place on town centre sites, followed by edge of centre sites, district and local centre sites, and only then out of centre sites. Local authorities, developers and retailers are expected to adopt a flexible approach when considering the format, design and scale of development. The guidance recognises that flexibility is particularly important in small and historic towns where development should be of a scale appropriate to the town centre.

2.9 PPG6 recognises that development plans cannot anticipate every proposal for retail development likely to come forward over the Plan period, and endorses the use of criteria based policies for development outside existing centres which should include, inter alia, consideration of need, the sequential approach, impact and accessibility.

2.10 PPG6 also indicates that plans may distinguish between primary and secondary frontages in town centres. The advice is that primary frontages may be restricted to a high proportion of retail uses, particularly A1, whereas there should be more flexibility in secondary frontages. Plans should set out clear guidelines, to apply in development control decisions.

PLANNING POLICY GUIDANCE: TRANSPORT (PPG13, MARCH 2001)

2.11 National planning policy guidance on transport seeks to reduce travel by car and encourage alternative means of travel. The Local Plan should therefore seek wherever possible to ensure that new development is located in existing centres, served by a variety of means of transport.

2.12 The guidance sets out maximum levels of parking for different types of development. For retail development, the national maximum parking standard for food is 1 space per 14 sq m gross and for non-food 1 space per 20 sq m gross floorspace. For D2 uses (other than cinemas and conference facilities) the standard is 1 space per 22 sq m gross, for cinemas and conference facilities, 1 space per 5 seats.

REGIONAL PLANNING GUIDANCE: EAST ANGLIA TO 2016 (RPG6, 2000)

2.13 RPG6 sets the regional framework for development plans in East Anglia up to the period 2016. It is also a material consideration to be taken into account, where relevant, in the determination of planning applications.

2.14 Policy 1 seeks to promote an urban renaissance, to maintain and enhance the towns and cities of East Anglia so that they become more accessible and desirable living and working areas with strong economies which provide attractive environments and a high quality of urban life. It states that development plans and other strategies should include policies to protect and enhance urban areas and address local concentrations of urban deprivation and poor physical conditions.

2.15 Policy 2 seeks to locate major new development and other investment in infrastructure and services so as to minimise use of undeveloped land and enable the inhabitants of individual settlements to meet their needs locally wherever possible, thereby contributing to sustainability. It adopts a sequential approach to meeting this development need with first preference being the effective use of existing buildings and infrastructure, then sites within built up areas, then development on previously developed sites on the edge of or close to urban areas and then finally development on previously undeveloped sites.

2.16 In accordance with PPG6, the guidance states that the region's existing town and city centres should continue to be the main focus of the social and economic life of communities in East Anglia and should be the preferred location for developments which attract large numbers of people. In relation to retail development, it notes that with a growing population and relatively buoyant economy, the pressure for retail and leisure developments can be expected to continue.

2.17 RPG6 notes that the degree to which new expenditure will translate into a need for additional floorspace is uncertain and that more efficient use of existing floorspace, Sunday trading and e-commerce, is likely to reduce the need for additional developments. The guidance highlights PPG6 which favours retail and leisure development in town centres, noting that this requires a sequential approach to retail and leisure proposals and that it sets very strict criteria against which any out of centre proposal would need to be tested.

SUFFOLK STRUCTURE PLAN, 2001

2.18 The Suffolk Structure Plan (2001) produced by Suffolk County Council is a '*statement of strategic policies for the protection of the environment and the control of development over the next 15 years*'. It defines two key strategic aims: -

"Strategic Aim 1:

The overall aim of the Structure Plan for Suffolk will be to sustain and enhance the health, quality and integrity of the built environment and natural environment, and to ensure that development does not result in material damage to critical environmental resources."

"Strategic Aim 2:

To an extent and in a manner consistent with Strategic Aim 1 the Structure Plan will:

(a) promote a healthy economy;

(b) meet identified housing requirements;

(c) integrate provision for development and transport;

(d) provide for leisure and social needs."

2.19 The Structure Plan states that the unqualified use of the term 'to an extent' (Strategic Aim 2) in seeking to meet needs (a) to (d) indicates that there may be thresholds beyond which conformity with Strategic Aim 1 may be compromised. Only in cases of material impact on a critical environmental resource is development likely to be totally ruled out by the provisions of the Structure Plan.

2.20 The Structure Plan identifies out migration from London and the south-east to Suffolk as a key factor in driving population and employment growth. Major investment in the A12 trunk road and in electrification of the London-Norwich rail line has led to an increase in commuting to London, and shortages of development land and capacity problems on the transport network are beginning to encourage the dispersal of investment from Cambridge into Suffolk.

2.21 Strengthening links with the south-east and Cambridge are likely to play an increasing role in economic development and employment growth in the county. Under the terms of Policy CS2, the Ipswich Policy Area, Bury St Edmunds and Lowestoft are intended to take the leading strategic role in accommodating new employment as part of the county development strategy. Stowmarket, Sudbury and Haverhill are expected to make a more modest but nevertheless important contribution. At other settlements, employment development may be located within or, where indicated on the Local Plan, adjoining the built up area, at a scale consistent with the potential for sustainable development at each settlement.

2.22 Policy CS3 of RPG6 states that the Ipswich Policy Area and Bury St Edmunds are intended to take the leading strategic role in accommodating new housing as part of the county development strategy. Provision for significant housing will be made at Lowestoft, Stowmarket, Sudbury and Haverhill. Policy CS8 indicates that the County is to provide for 2,650 additional dwellings per annum between 1996 and 2016 (Table 2.1). The development strategy focuses on accommodating these additional dwellings within built up areas, through the re-use of brownfield sites including infilling, redevelopment and the conversion of existing buildings (Policy CS7).

Table 2.1: Proposed Increases in Dwelling Stock, Suffolk County 1996-2016

District/Borough	Dwelling Per Annum
Babergh	345
Forest Heath	260
Ipswich	400
Mid Suffolk	405
St Edmundsbury	440
Suffolk Coastal	470
Waveney	335
TOTAL	2,650
Ipswich Policy Area	
Babergh (part)	55
Ipswich Borough	400
Mid Suffolk (part)	40
Suffolk Coastal (part)	160
TOTAL	655

Source: Suffolk Structure Plan 2001
Note: Ipswich Policy Area figures included in District and Suffolk figures above

2.23 The importance of the environment in Suffolk is reflected throughout the Structure Plan, particularly in Strategic Aim 1. Suffolk's towns and villages, including those in Suffolk Coastal District, have many buildings and groups of buildings which have special merit in terms of architecture, archaeology or historic interest. In particular, the towns in Suffolk Coastal District all have conservation area designations and some areas are within Areas of Outstanding Natural Beauty and the Heritage Coast. A number of policies (ENV1 – ENV22) in Chapter 6 aim to protect this environment and landscape throughout the County.

2.24 The Structure Plan states that in Suffolk 'town centres' form the focus of the urban communities and their wider hinterland. Policy ECON8 states that the extent of town and local centres will be defined in local plans. The Structure Plan aims to maintain and enhance the vitality and viability of these centres by:

- improving the quality and range of retailing facilities;

- providing for service, business, educational, leisure and residential uses;
- improving the environment and transport facilities through both public and private sector investment. (Policy ECON8)

2.25 Policy ECON9 aims to ensure that development is of scale and nature appropriate to a town's position in the settlement hierarchy. It states that new development which is likely to attract a substantial number of trips will only be acceptable where there is no material adverse impact on the vitality, viability or character of a town centre; the local plan strategy for a town centre; future investment necessary to safeguard the vitality and viability of a town centre.

2.26 Policy ECON10 adopts a sequential approach towards the location of new development of the type identified in Policy ECON9.

"Development consistent with ECON9 will be acceptable:

A. Within town centres;

B. Adjoining a town centre where a need for the proposed development can be demonstrated and there are no suitable alternative sites available within the town centre;

C. Away from but within easy walking distance of the town centre or within a local centre where a need for the proposed development can be demonstrated and there are no suitable alternative sites available within or adjoining the town centre;

D. Within towns but outside of local centres and not within easy walking distance of the town centre where a need for the proposed development can be demonstrated;

E. Outside towns only where a need for the proposed development can be demonstrated and there are no alternative sites within the town."

2.27 It is recognised that all of the town centres have a variety of facilities grouped together, such as leisure, public services, commercial offices and libraries as well as shopping. Thus one journey to a centre can serve several purposes. The Structure Plan therefore argues that from the standpoint of sustainable development and social equity it is reasonable to place considerable emphasis on the role of the town centre as a location for a variety of different uses.

2.28 The Structure Plan acknowledges guidance set out in PPG6 for retail development resulting in an increase of 2,500 sq m or more of gross floorspace should be supported by evidence that the proposal does not conflict with Policy ECON9. It adds, however, that many of the smaller market towns in Suffolk may be adversely affected by development of less than 2,500 sq m gross floorspace. In such cases Local Planning Authorities may request Retail Impact Assessments.

SUFFOLK COASTAL LOCAL PLAN, FEBRUARY 2001

2.29 The current Suffolk Coastal Local Plan was adopted in February 2001. The Plan covers the period up to 2006. Part 1, Chapter 4 deals with 'Retail Centres and Retailing' on a general level. Part 2 details each town centre strategy addressing profile, objectives, policies and proposals.

2.30 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."*

2.31 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.

2.32 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.

2.33 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.

2.34 Policy AP61 address the sequential approach as defined in PPG6. 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.

2.35 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), AP2 (Permitted Development Rights) and AP3 (Demolition).

2.36 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.

2.37 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.

2.38 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.

2.39 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.

2.40 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.

2.41 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. The absence of a modern supermarket in Aldeburgh is recognised, and Policy AP131 identifies land at Saxmundham Road as being suitable for the development of a supermarket up to 470 sq m net floorspace, subject to highway access and appropriate parking provision.

2.42 Town centre policies for Framlingham relate broadly to car parking, The Castle and Mere, 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. The Castle is a Grade I Listed building and the Mere is a Site of Special Scientific Interest. Policy AP140 seeks to pay particular attention to the setting of both and states that any development likely to detract from the inherent landscape quality of the area will be resisted. The District Council addresses the opportunity to support the Town Council to improve the appearance of Market Hill in Policy AP141. No retail development sites are identified in Framlingham town centre.

2.43 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 floorscape 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.

2.44 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.

2.45 New food retailing within the Ipswich Eastern Fringe is proposed in Policy AP22. This has now been implemented and two foodstore developments have now been completed and are fully operational and trading on the sites identified, notably part of the Martlesham Heath General Employment Area and The Grange Farm District Centre.

SUFFOLK COASTAL – COMMUNITY STRATEGY, MARCH 2003

2.46 This document outlines the Local Strategic Partnership's Vision for the future of Suffolk Coastal: -

"…building on the best of the present, it should be a District where people:

- *Want to live, and to Invest;*
- *Care for Others, and the Environment."*

2.47 To achieve this aim, change is acknowledged as being both inevitable and required. The document states it is essential that rural parts of the District can evolve and develop at a scale and manner that provides for a sustainable long-term future. The importance of addressing key disparities that exist between different parts of the District is emphasised in the Strategy, concentrating in particular on raising health and income levels in the Felixstowe and northern parts of the District. Improving service access across all rural areas is viewed as one of the key priorities.

2.48 The Strategy focuses on identifying the key issues and barriers that need to be tackled to achieve the Vision, and on determining the means by which those issues can be addressed and barriers overcome. Five such areas have been identified which the Partnership considers to be priorities for the District:

i. Tackling issues relating to young people;

ii. Providing additional affordable housing;

iii. Improving accessibility to services and jobs (particularly in rural areas);

iv. Reducing the fear of crime;

v. Supporting voluntary and community groups (including the Town and Parish Councils) to develop and thrive.

2.49 In order to address the issues above, the document puts forward the themes of 'community well being', 'housing', 'the environment', and 'the economy' to target and structure the strategy around. For each key theme, strategic areas are identified, for which targets are selected, and some principal actions stated. The needs of young people, support for the elderly, and self-sustaining communities are identified as particularly important in the strategy.

2.50 Details of 'targets' and 'principal actions' can be found in 'The Community Strategy', attached in Appendix 4.

SUMMARY

- National Planning Policy Guidance provides the framework for developing Local Plan shopping policies which are tailored to the specific circumstances of Suffolk Coastal District. The broad thrust of policy is wherever possible to sustain and enhance existing centres, and to plan positively for new development within them, consistent with their respective roles and the needs of the catchments.

- PPG6 indicates that the key role for the Local Plan is, within the context of the Structure Plan retail hierarchy, to consider existing provision and identify sites for development. PPG6 includes the concepts of need and the sequential approach. The Local Plan must consider the need for further retail floorspace in the District and where a need is identified a sequential approach must be adopted to selecting sites for new retail development.

- PPG6 recognises that development plans cannot anticipate every proposal for retail development likely to come forward over the plan period; in these circumstances it endorses the use of criteria based policies in the Local Plan for developing outside existing centres, which should include inter alia consideration of need, the sequential approach, impact and accessibility.

- PPG13 seeks to reduce travel by car and encourage alternative means of travel. The Local Plan should therefore seek wherever possible to ensure that new development is located in existing centres, served by a variety of means of transport.

- RPG6 sets the regional framework for development plans in East Anglia up to the period 2016. It seeks to maintain and enhance the towns and cities of East Anglia and create a high quality of urban life. In accordance with PPG6, local authorities are to take account of need and the sequential approach, and the region's existing town and city centres should continue to be the main focus for the social and economic life of communities. The document notes that the pressure for retail and leisure developments can be expected to continue.

- The Structure Plan recognises that outmigration from London, investment in transport links and shortages of development land are encouraging the dispersal of investment from Cambridge into Suffolk. The Ipswich Policy Area, Bury St Edmunds and Lowestoft are intended to take the leading strategic role in accommodating new employment. The Ipswich Policy Area and Bury St Edmunds are proposed to fulfil the same role for housing.

- The Structure Plan aims to maintain and enhance the vitality and viability of the six town centres in the District and to ensure that development is of scale and nature appropriate to a town's position in the settlement hierarchy. Policies incorporate the sequential approach for new development as outlined in PPG6, and acknowledge cases where retail developments under the 2,500 sq m gross floorspace threshold may require a Retail Impact Assessment.

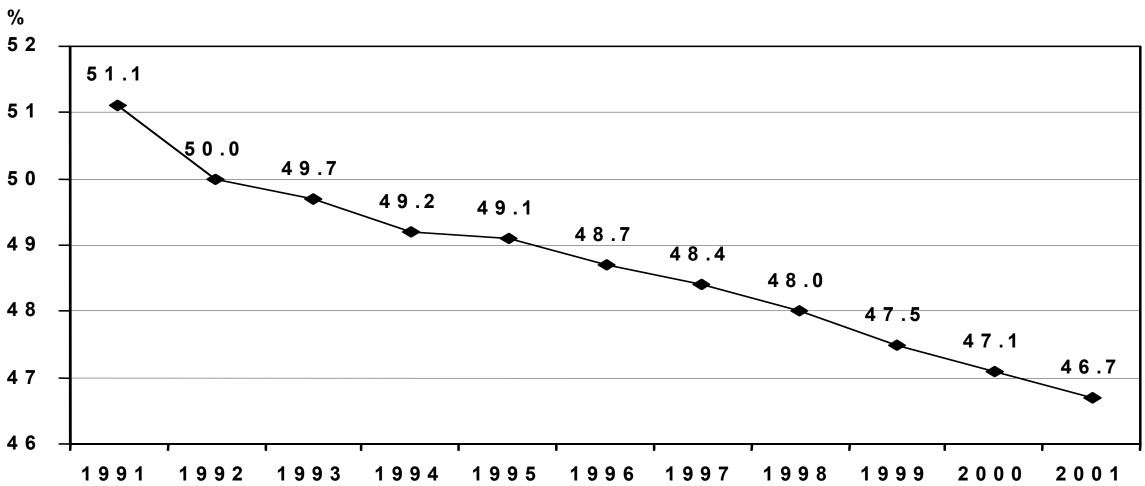
- Part 1 of the adopted Local Plan addresses general town centre policies and Part 2 provides a detailed overview of specific area policies including each of the six town centres. We consider the Local Plan effectively covers important issues and plans effectively for the future of the town centre's, in particular considering the need for new development, the sequential approach, identification of development sites, preventing the loss of town centre retailing, enhancing the environment and car parking provision.

3. RETAIL TRENDS

3.1 Retail sales increased by 6.2% between 2000-2001. This was the highest sales growth for several years and is largely as a result of increased available expenditure where people have re-mortgaged to take advantage of low interest rates. Verdict Analysis predict that retail sales growth will slow in 2002 as interest rates stabilise and in subsequent years growth of no more than 4% is predicted. With the slow down in the growth of retail sales, Verdict Analysis predict different fortunes for retailers in different sectors in the future. DIY, electrical, music, video and software sectors will be faster growing, whereas food and grocery, clothing and footwear and floor coverings all face intense competition with low price inflation (price deflation in some cases) and low volume growth.

3.2 Although high street sales grew by 43% between 1991-2001, this is below the growth rate for all UK sales (56%) as total sales were driven by much stronger growth in out of town sales (150% between 1991 and 2001). Verdict Analysis indicates that the slower rate of high street growth reflects its relative decline in significance over the last decade. The high street now accounts for 47% of retail sales compared with 51% in 1991 (Figure 3.1). Figure 3.2 indicates that out of town locations and e-commerce have eaten into high street sales.

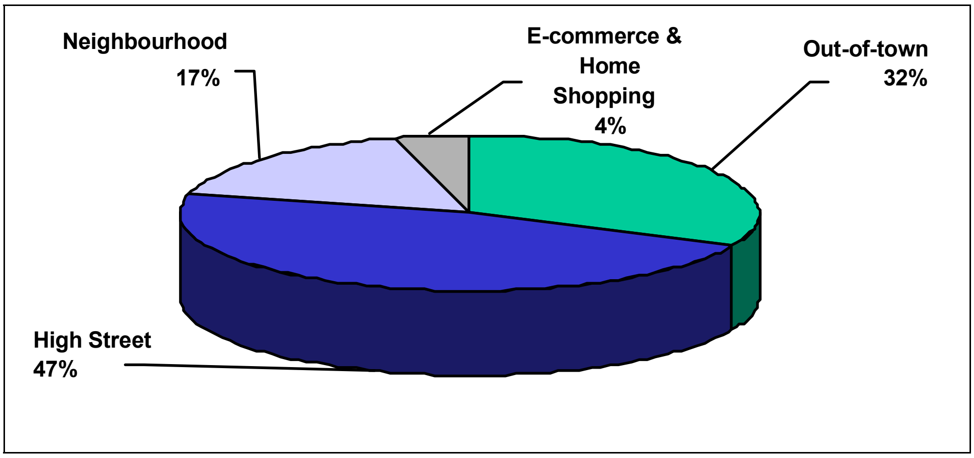
Figure 3.1: High Street Share of Total Retail Sales 1991 – 2001



Note: High street figures include out-of-town shopping malls such as Bluewater

Source: Verdict Analysis

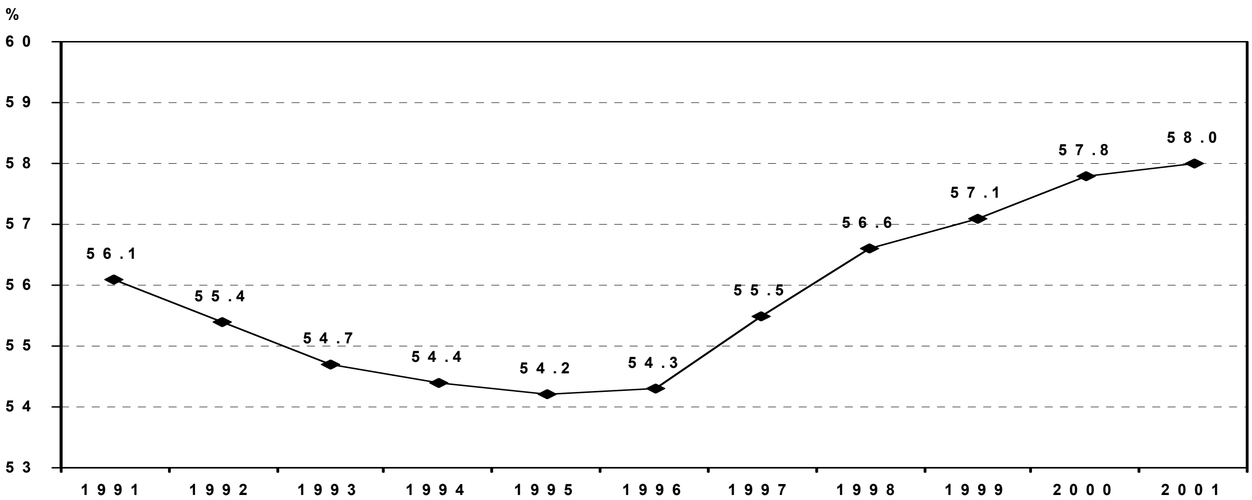
FIGURE 3.2 SHARE OF SALES



Source: Verdict Analysis

3.3 National retail trends indicate a continuing contraction in the number of shop units. Total store numbers in the UK have declined by 11% over the last 10 years. This masks variations in store numbers in different locations. Whilst the share of sales has drifted towards the out of town retailers, the high street increased its share of store numbers in the latter part of the decade, largely as a result of Government policy (Figure 3.3). This trend looks set to continue, particularly with the virtual end of the development of large out of town regional shopping centres such as Lakeside and Bluewater and the focus instead on town centres schemes such as West Quay in Southampton and the Oracle in Reading. The larger format of out of town stores means that retailers require fewer stores to increase sales, hence the relative decline of high street sales.

Figure 3.3: High Street Outlet Numbers – Share of all Outlets 1991 - 2001



Note: High street figures include out-of-town shopping malls such as Bluewater

Source: Verdict Analysis

3.4 Alongside the re-emergence of the high street is the continuing polarisation by retailers towards larger schemes in larger centres, to the detriment of smaller centres. CB Hillier Parker's 'National Survey of Local Shopping Patterns' shows that the top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping. There is therefore a concentration of comparison goods expenditure in a smaller number of larger centres. This is being reinforced by new development particularly in shopping centres and malls. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres which will further reinforce their dominant market share. This concentration of retailing in larger centres is likely to threaten some medium and smaller towns. The maintenance of an attractive and accessible convenience goods offer in Suffolk Coastal District will remain important.

3.5 The advent of new technology such as internet or digital television home shopping is unlikely to have a universal effect on retail expenditure. Certain sub-sectors are likely to be more affected than others, as the internet has particular attraction for certain types of retailing, including books, CD's and high value electrical goods. Verdict indicate that many of the high street's key national multiples are developing multi-channel strategies that combine the technology of the internet with the brand power of their stores. Examples include WH Smith and Boots. Verdict suggest that the 'clicks and mortar' approach could further increase the concentration of markets. Centres that offer a range of complementary, non-retail attractions and/or offer a high level of convenient shopping facilities are likely to be more resilient to these changes.

3.6 In the convenience sector it is considered that internet shopping is unlikely to have a significant effect in the future. Although Verdict predict that growth will be fuelled by increasing consumer awareness, as growing numbers of women and older people become more confident in ordering on line and ordering is speeded up by broadband, overall they forecast that this will not have a significant effect on sales. Verdict predict that on-line sales will increase from £1.4bn in 2001 to £5.3bn by 2007, this will still however only make up 4% of all grocers and food specialist sales.

3.7 Changes are occurring in the traditional 'high street' fascias as evidenced by closures and rationalisation and the emergence of new retailers. Whilst these changes are most likely to affect the larger city centres, operators such as Arcadia whose high street fascias include Top Shop/Man, Burton, Dorothy Perkins, Evans and Warehouse are rationalising and reducing the number of outlets across the country. New retailers are emerging, including the international fashion stores such as Mango and Zara, but are only seeking representations in larger centres.

3.8 Retailers which are expanding more generally on the 'high street' include value orientated operators such as the clothing retailer Primark which has increasingly moved away from sites in more secondary locations to higher profile sites in town centres. Other mainstream value orientated retailers expanding on the 'high street' include Uniqlo and Peacocks and overall value orientated retailers look set to be a key growth area. As a reaction to this, middle market operators are segmenting their offer further, providing either more upmarket own brands such as Per Una and Blue Harbour in Marks and Spencer or more heavily discounted offers such as in New Look. Diversification into other sectors is also occurring particularly into homewares. For example Next and Monsoon are offering 'interior' products.

3.9 The space requirements of retailers on the 'high street' and particularly in shopping centre locations are also being reconsidered and increasingly operators are requiring larger footprints. Next for example is favouring larger units and the latest unit planned for the extension to the Arndale Centre in Manchester will provide a 4,000 sq m store which is a significant anchor store provision. Similarly operators such as H&M and Zara are requiring large footprints in order to be able to compete with one another and off centre locations, show case extensive product ranges and provide sufficient in store facilities and an attractive, modern shopping environment.

3.10 Whilst there has been a slow down in out of centre floorspace development, where opportunities arise there is continued pressure for large store formats. In the future it will be necessary to avoid the development of 'high street' type comparison goods in out of centre locations, in order to achieve PPG6 objectives of sustaining and enhancing town centres and to avoid any adverse impact from out of centre development on existing town centres.

3.11 Increasingly traditional 'high street' retailers are seeking to diversify their formats and provide out of centre facilities. For example, in the last few years Woolworths has introduced Big W stores which sell a range of home related products. Boots and WH Smith are also investing in out of town retail park stores, although they are finding it difficult to differentiate their offer sufficiently from their high street stores, and on the whole sell a greater proportion of lower ticket items. Clothing and footwear has also been moving away from the high street and onto out of town retail parks over the last 10 years. Next for example is focusing on out of town development, using the Directory and on line products to stock the larger format.

3.12 Food retailers are continuing to innovate. Some have developed smaller store formats (such as Tesco Metro and Sainsbury's Local) and been more innovative in their town centre proposals. However, the pressure for larger superstores and hypermarkets will continue, particularly through the expansion of successful out-of-centre foodstores. With town centre foodstores tending to underpin the role of smaller centres, the cumulative impact of these superstores may undermine smaller centres over a number of years. Any further proposals for expansion of existing out of centre convenience stores must be considered in terms of need, sequential approach and impact.

3.13 There is likely to be growth in both 'in home' and 'away from home' leisure in the future, with 'in home' growing faster as a result of expenditure on home computers, digital TVs, audio equipment and gardening. Where these goods are sold in town centres, the centres could benefit through increased footfall. Growth in certain sectors of the away from home leisure industry such as eating out and sightseeing could potentially be of greater benefit to the market towns and villages. However, this must be balanced against the likely decline in the position of the traditional public house, which proliferate in many of the smaller centres and often have key, central locations.

SUMMARY

- National retail trends indicate a contraction in the number of shop units and slowdown in the growth of retail sales, which may reduce the scope for further retail floorspace in the District. Other key trends which are likely to have more varied effects include the polarisation by retailers towards larger centres, a reduction in out of town development, the growth of internet shopping and changes in retailers formats and operational strategies.

- Reflecting the changes underway in the retail sector, and the challenges facing some of the smaller town centres, it is timely to consider the relative role and function of the centres in the District and the extent to which they are serving the shopping needs of all residents. In each case, we consider maintaining and enhancing the convenience and services function, and developing 'niche' speciality retailing will be critical to the long term future of the Suffolk Coastal towns.

4. SUB-REGIONAL CONTEXT

4.1 Planning Policy Guidance Notes 6 and 13 set out the Government's policies on 'town centres and retail development' and 'transport'. These highlight the objectives to maintain a competitive and innovative retail sector, and to provide a wide range of retail and other facilities which are readily accessible. The guidance identifies the role of retail hierarchies, but acknowledges that the role of centres can change over time, and calls for effective planning at regional and local levels to provide adequate shopping facilities to meet current and future needs.

4.2 We have considered the position and role of Felixstowe, Woodbridge, Saxmundham, Leiston, Framlingham and Aldeburgh (Plan 1), their relationship with each other and within the network of competing centres in the Ipswich sub-region (Plan 2). The centres assessed are those we consider have the greatest influence on shopping patterns in Suffolk Coastal District. We draw upon the CB Hillier Parker National Survey of Local Shopping Patterns; Experian Goad Retail Centre Rankings (2001), Focus Property Database, Retail PROMIS and EGi to review the relative position of centres. We also present our assessment of competing centres, identifying the main retail offer and the extent to which this is likely to change and affect the six Suffolk Coastal District town centres over the Local Plan Review period.

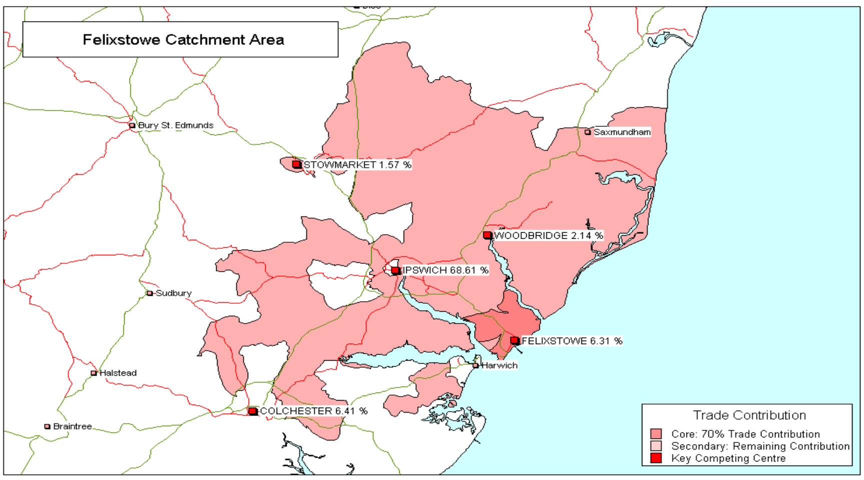
4.3 The 'shopping population' and consequent 'rank' of each of the defined town centres has been derived from CB Hillier Parker's National Survey of Local Shopping Patterns, 2002. It is evident from Table 4.1 that Norwich is the strongest competitor assessed with the largest shopping population travelling to the City for their main shopping. Ipswich, the closest town centre to the Suffolk Coastal District town centres, has the second highest shopping population, whilst Colchester ranks third. The shopping populations of the Suffolk Coastal District town centres are smaller than their strong and improving competitors. This largely reflects the 'lower order' function of these towns and their qualitative limitations.

Table 4.1: Competing Shopping Centres

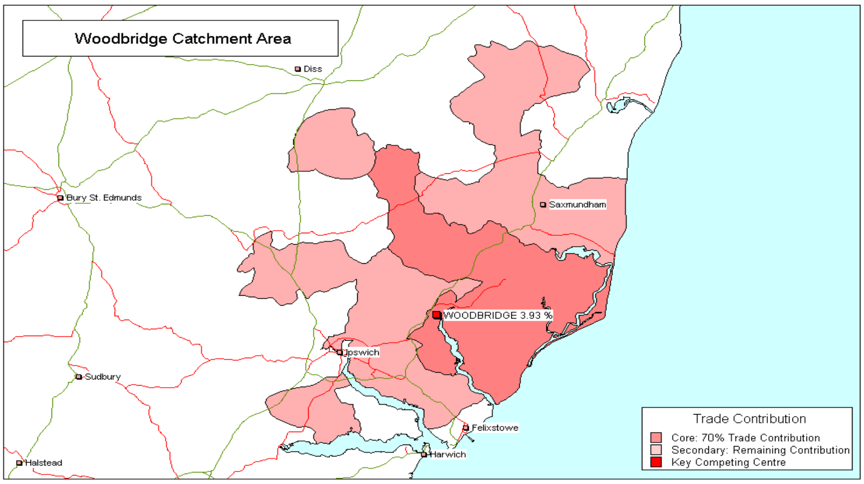
CENTRE	LOCAL AUTHORITY	SHOPPING POPULATION	RANK POSITION
Norwich	Norwich City Council	485,904	15
Ipswich	Ipswich Borough Council	261,535	52
Colchester	Colchester Borough Council	225,844	59
Bury St Edmunds	St Edmundsbury Borough Council	111,604	138
Lowestoft	Waveney District Council	71,434	186
Felixstowe	Suffolk Coastal District Council	18,389	371
Stowmarket	Mid Suffolk District Council	13,158	431
Woodbridge	Suffolk Coastal District Council	6,544	612
Saxmundham	Suffolk Coastal District Council	1,116	1,206
Leiston	Suffolk Coastal District Council	908	1,280
Aldeburgh	Suffolk Coastal District Council	445	1,615
Framlingham	Suffolk Coastal District Council	441	1,620

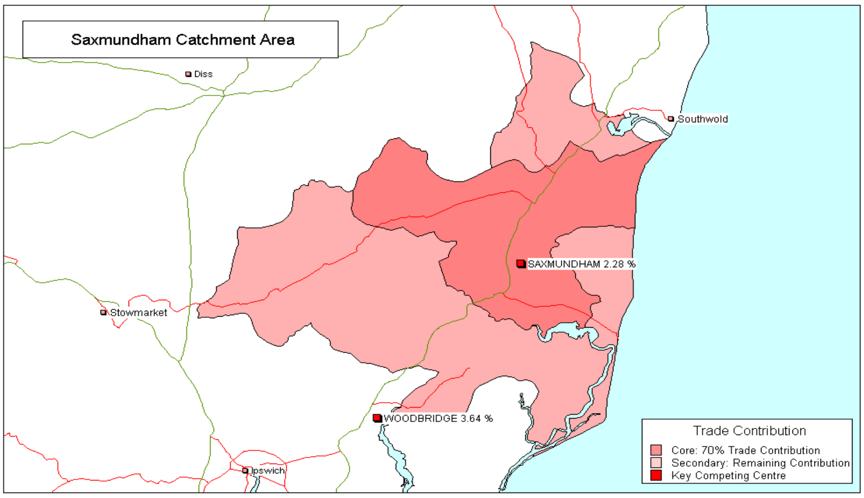
Source: CB Hillier Parker's National Survey of Local Shopping Patterns, 2002

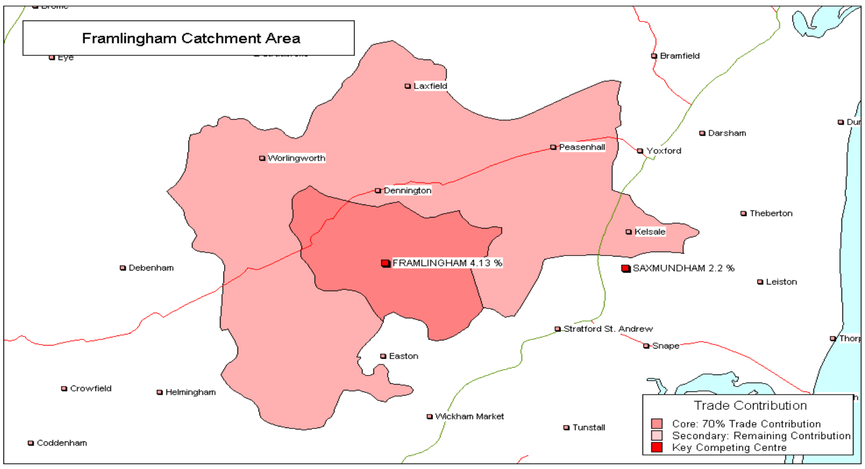
4.4 The following Plans illustrate the shopping catchment areas of Felixstowe, Woodbridge, Saxmundham, Leiston, Framlingham and Aldeburgh derived from CB Hillier Parker's National Survey of Local Shopping Patterns. The 'core catchment' of each centre identifies the postal sectors that contribute 70% of the town's overall shopping population, i.e. 70% of the town's shoppers are attracted from the darker-tinted area of the catchment. The remainder of the shopping population is attracted from the lighter tinted area. The core catchment 'island' to the north of Aldeburgh town centre is likely to be an anomaly sometimes discovered in the survey sampling numbers for small centres.

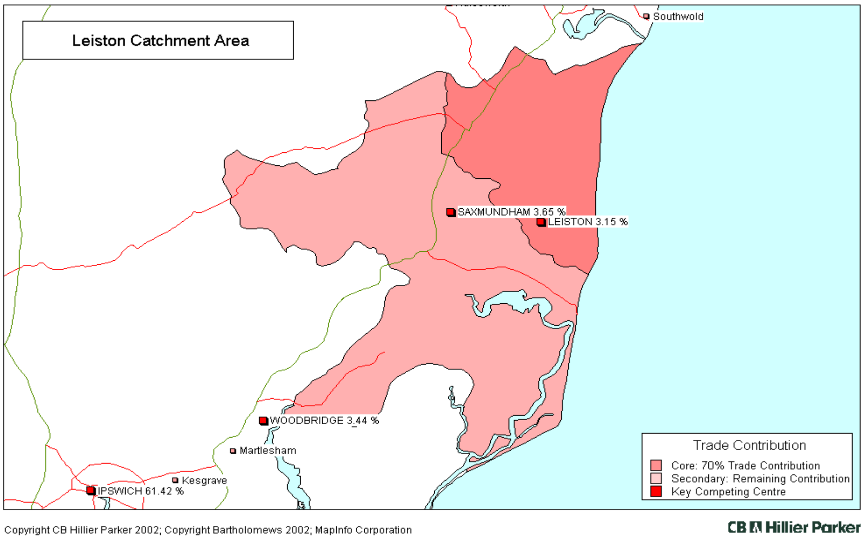


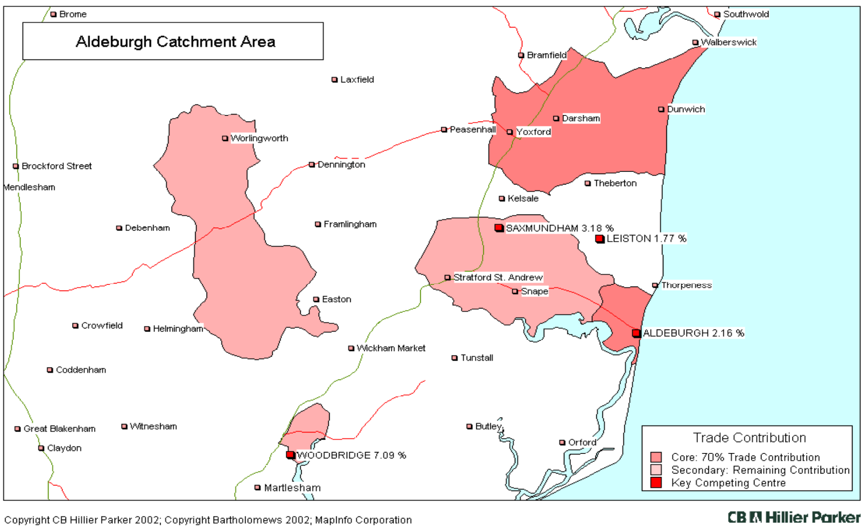
CB Hillier Parker


Woodbridge Catchment Area
Diss
Bury St. Edmunds
Saxmundham
WOODBRIDGE 3.93 %
Ipswich
Sudbury
Felixstowe
Harwich
Halstead
Trade Contribution
Core: 70% Trade Contribution
Secondary: Remaining Contribution
Key Competing Centre


Saxmundham Catchment Area
Diss
Southwold
SAXMUNDHAM 2.28 %
Stowmarket
WOODBRIDGE 3.64 %
Ipswich
Trade Contribution
Core: 70% Trade Contribution
Secondary: Remaining Contribution
Key Competing Centre


Framlingham Catchment Area
Bramfield
Laxfield
Darsham
Peasenhall
Yoxford
Worlingworth
Dennington
Theberton
Kelsale
Debenham
FRAMLINGHAM 4.13 %
SAXMUNDHAM 2.2 %
Leiston
Stratford St. Andrew
Snape
Easton
Crowfield
Helmingham
Wickham Market
Tunstall
Coddenham
Trade Contribution
Core: 70% Trade Contribution
Secondary: Remaining Contribution
Key Competing Centre





4.5 We have compared Felixstowe with the 'higher order' competing centres using the Experian Goad Retail Centre Rankings, 2001. Woodbridge, Saxmundham, Leiston, Framlingham and Aldeburgh are not included in this particular classification. Experian Goad produced the Retail Centre Ranking (2001) which assesses the vitality of retail centres by combining the following factors, to generate 'a vitality score':

- Number of multiple retailer outlets (40%);
- Number of service and miscellaneous outlets (10%);

- Number of comparison retailer outlets (10%);
- Floorspace of retail outlets (10%);
- Floorspace of multiple retailer outlets (10%);
- Floorspace of vacant outlets (10%);
- Number of key retail attractors (10%).

4.6 Table 4.2 outlines the Experian Goad Retail Rankings, 2001. This indicator reiterates the strength of Norwich as a shopping destination which has the highest rank of 9, followed by Ipswich, Colchester, Bury St Edmunds and Lowestoft. It is evident that Felixstowe has one of the lowest vitality scores when compared to these higher order competing centres, although the town centre does fall above Stowmarket in the rankings classification. Felixstowe's low vitality score reflects the more limited number of multiple retailers present in the town centre, more limited retail floorspace, and its lower order shopping function.

Table 4.2: Experian Goad Retail Rankings, 2001

Rank	Centre	Vitality Score
9	Norwich	271
39	Ipswich	219
64	Colchester	190
159	Bury St Edmunds	138
225	Lowestoft	114
357	Felixstowe	86
486	Stowmarket	72

Source: Experian Goad Retail Rankings, 2001

RANKING OF COMPETING CENTRES

NORWICH

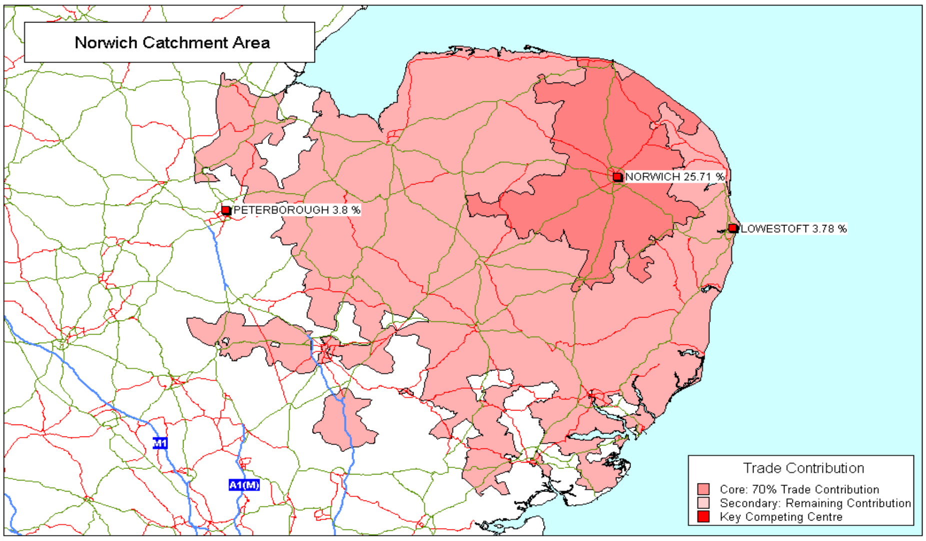
4.7 Norwich is the largest of the major East Anglian centres located approximately 44miles (65 minutes) from Ipswich and a further 10-12 miles from Felixstowe. The City had an Experian Goad Retail Ranking of 9 in 2001, compared to Felixstowe's rank of 357. Table 4.3 highlights the City's main competitors.

Table 4.3: Main Competition, Drive Times and Distances From Norwich

Town	Minutes	Miles
Great Yarmouth	30	19
Lowestoft	43	28
Kings Lynn	63	44
Ipswich	65	44
Cambridge	84	64

Source: Retail Promis, December 2002; PMA; MapInfo

4.8 Norwich dominates a large, but sparsely populated primary catchment area, which encompasses much of eastern Norfolk and extends north towards the East Anglian coast and west towards Peterborough. The city attracts a regular comparison goods shopping population from its catchment of 485,904, the highest in the vicinity. This ranks the centre 15 nationally by size out of more than 4,500 trading locations. The geographical extent of this shopping catchment is illustrated on the following plan, 'Norwich Catchment Area'.



 CB Hillier Parker

4.9 Norwich has approximately 167,220 sq m gross of retail floorspace, and the retail offer is very diverse with a good range of national multiples. Quality fashion retailers include Jaeger, Austin Reed, East & Viyella as well as a number of speciality shops; and department and variety stores include John Lewis, Debenhams and Marks & Spencer. The City has two shopping centres. The Anglia Square Shopping Centre opened in 1972 and has approximately 12,800 sq m gross of retail floorspace. It is an open shopping centre on two levels with the upper floor home to the public library, the stationery office, a fitness club and an Odeon cinema. The lower level has over 50 retail units. Key anchor retailers include What Everyone Wants, Iceland, Boots the Chemist and Budgens whilst additional retailers include a number of lower market retailers including Cash Generator, Shoe Zone, Card Fayre, Bakers Oven, Martins and Savers.

4.10 The Castle Mall Shopping Centre opened in 1993 and has a retail floorspace of approximately 33,500 sq m gross. It is larger and more modern than the Anglia Square shopping centre, with a more dominant representation of higher order retailers. The centre is beneath a 4 acre park, Castle Green, which was created as part of the scheme. Although Castle Mall does not include a traditional anchor in the form of a major department or variety store, a number of prominent retailers act as anchors. Key anchor retailers include Virgin Megastore, Argos, Boots the Chemist, H&M, and Mothercare. Additional multiple retailers include Birthdays, La Senza, Oasis, Orange, Sofa Workshop, Sunglasses Hut and Jeffrey Rogers. STER Multiplex cinema is located on the fourth floor.

4.11 Much of the city centre of Norwich is characterised by historic architecture and a series of narrow lanes and alleyways. Whilst this creates an attractive environment, small units and awkward configurations are not ideal for modern retailing. The main shopping area is mostly pedestrianised. The city's prime pitch comprises Gentleman's Walk and the eastern side of Haymarket. It is anchored at the northern end by the independent Jarrolds department store, and by Debenhams to the south. Retailers along the pitch include WH Smith, HMV, Dixons and a number of mid-market fashion fascias. Next now trade from the former 2,322 sq m C&A store.

4.12 Convenience provision in the city includes a Tesco Metro on Guildhall Hill and an Iceland on St Stephen's Street. There are also foodhalls in Marks & Spencer and the Co-op department store. A 6,500 sq m gross Sainsbury's superstore is located on the fringe of the main shopping area towards the southern end of St Stephen's Street.

4.13 The retail offer will be further enhanced following the completion of the new Chapelfield shopping centre in Autumn 2005. Chapelfield is proposed to be a prime retail destination, offering a range of catering, residential, civic and landscaped spaces in the heart of the historic city. Retail floorspace will comprise approximately 52,500 sq m and retailers will include House of Fraser, Mango, Pizza Hut, Sports Soccer and Superdrug. Construction on the new £25m retail development on the site of the former Nestle factory has begun, and over 60% of the scheme is already let. In terms of other future retail development, The Anglia Square shopping centre is the subject of development proposals by the site owner Quintain Estates.

4.14 There is currently strong retailer demand to locate in Norwich. High levels of interest from retailers began towards the early 1990s following completion of the Castle Mall shopping centre. It is evident from Table 4.4 that in October 2002 Norwich had its highest number of requirements since October 1997, and achieved a rank of 39th with 104 reported requirements. Operators with a registered demand to locate in the city include a number of mass-market pubs and cafes, and fashion retailers including Benetton, Bon Marche, Elle, Kaliko, Mexx, Quicksilver and Republic. Other notable retailers include The Gadget Shop, Mapping & Webb and Warner Bros.

Table 4.4: Norwich Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
104	39	October 2002
99	33	October 2001
92	34	October 2000
103	31	October 1999
84	44	October 1998
96	32	October 1997

Source: Focus Property Intelligence, April 2003

IPSWICH

4.15 Ipswich is the largest town in Suffolk and acts as the county's main administrative centre. Ipswich provides the main competition for the six town centres in Suffolk Coastal District. Felixstowe and Woodbridge are only some 10-12 miles away. Table 4.5 illustrates the town's closest significant competitors are Bury St Edmunds and Colchester, both of which have less town centre floorspace than Ipswich.

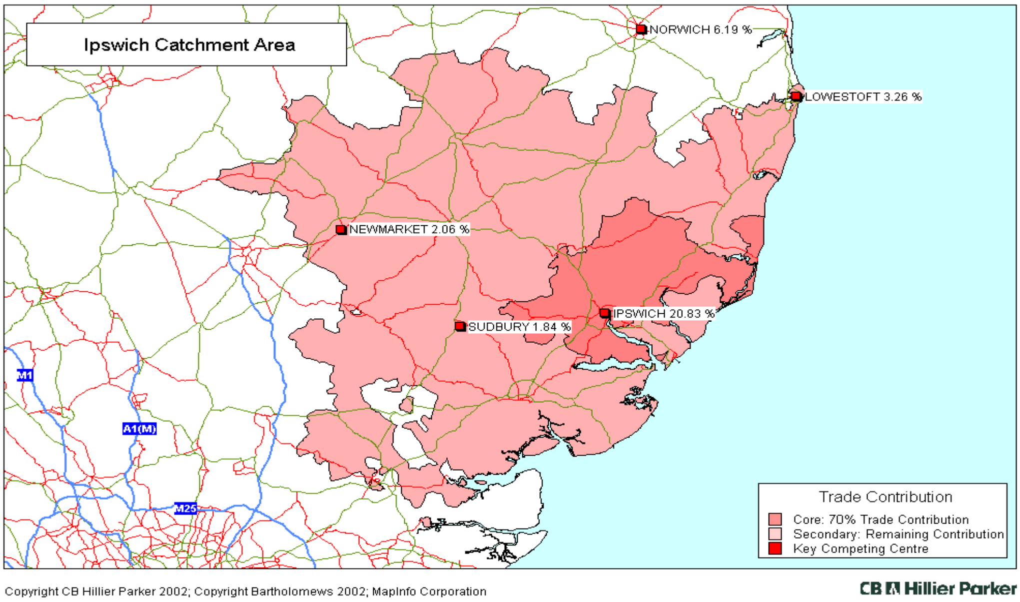
Table 4.5: Main Competition, Drive Times and Distances from Ipswich

Town	Minutes	Miles
Colchester	26	17
Bury St Edmunds	35	27
Norwich	65	44
Cambridge	71	56

Source: Retail Promis, February 2003; PMA; MapInfo

4.16 Ipswich achieved a rank of 39 in the Experian Goad Retail Centre Rankings, 2001. This is the second highest ranking centre, behind Norwich, within the vicinity of Suffolk Coastal District. In 2001, Ipswich had a vitality score of 219 compared to Felixstowe's score of only 86, largely reflecting the more limited representation of multiple retailers and retail floorspace in Felixstowe.

4.17 The primary catchment area of Ipswich extends over much of Suffolk towards Lowestoft in the north east and Newmarket in the west. The catchment area is restricted by Bury St Edmunds to the west, Norwich to the north and Colchester to the south. Felixstowe, Woodbridge, Saxmundham, Leiston, Framlingham and Aldeburgh are all within the catchment area. Ipswich attracts a regular comparison goods shopping population from its catchment of 261,535. The geographical extent of this catchment is illustrated on the plan below, 'Ipswich Catchment Area'.



4.18 Ipswich has approximately 120,770 sq m gross of retail floorspace. This is a relatively high level of provision when compared to the towns catchment size. Representation of standard high street multiples in the town centre is good, although there is a more limited number of speciality and upmarket fashion retailers. Department and variety store provision includes an Allders and a Debenhams department store, both incorporating a number of upmarket concessions, and an additional large Co-op department store. BHS, Littlewoods and Marks & Spencer are also represented.

4.19 Around a quarter of town centre floorspace in Ipswich is within managed shopping centres. The town centre has two main shopping centres, the Buttermarket shopping centre and Tower Ramparts. The Buttermarket shopping centre opened in 1992. It has approximately 25,000 sq m gross of retail floorspace which is anchored by Allders and New Look. Additional mid to lower market retailers include Designer Hair Studio, Hannah Jewellery, Matthews Electrical and the Sony Centre. In 1999, ten units on the upper floor were combined to provide a large store for TK Maxx. The centre has suffered from an unstable tenant mix since opening.

4.20 The Tower Ramparts shopping centre on Tavern Street opened in 1986 and has a retail floorspace of approximately 12,500 sq m gross. The centre is located between the main bus terminus and the

Buttermarket shopping centre, forming part of the town's prime pitch. The centre underwent modest refurbishment in the early 1990s. Tower Ramparts is anchored by Littlewoods and additional retailers comprise more mid-market names including Boots the Chemist, Warehouse, Dorothy Perkins, Top Man, Top Shop, Stead and Simpson and Vision Express. In 2000, a third shopping centre in Ipswich known as the Eastgate Centre was redeveloped to create two large units, occupied by Peacocks and QD stores.

4.21 The prime pitch in Ipswich town centre extends eastwards from Marks & Spencer on Westgate Street to Tavern Street, just beyond the entrance to Tower Ramparts. The prime stretch of Tavern Street accommodates several national multiples, including The Body Shop, Dixons and HMV, whilst the prime stretch of Westgate Street accommodates some of the large stores in Ipswich including Debenhams, Gap, Marks & Spencer and WH Smith. In the convenience sector, Ipswich has a small Sainsburys store on Upper Brook Street and a Co-op on Carr Street. Iceland operates from St Matthews Street and there is a food hall in Marks & Spencer.

4.22 Retailer demand to locate in Ipswich has fluctuated between 57 and 82 requirements between October 1997 and October 2002. In October 2002, there were 82 requirements, the highest number since October 1997, resulting in a rank position of 59th. Retailers that have recently expressed interest in locating in Ipswich include a number of specialist retailers such as the Discovery Store, Dr and Herbs, the Gadget Shop and Lush, as well as fashion/clothing multiples such as Fat Face, Quicksilver, Eisenegger, Base and USC.

Table 4.6: Ipswich Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
82	59	October 2002
63	76	October 2001
65	70	October 2000
57	86	October 1999
63	76	October 1998
75	50	October 1997

Source: Focus Property Intelligence, April 2003

4.23 Current planning objectives aim to protect and enhance the status of Ipswich as a shopping centre through consolidation of existing town centre provision. The most significant scheme in the development pipeline is a major retail and leisure development on the eastern edge of the shopping centre; the site is currently in use as a car park. The 'Mint Quarter' development would comprise an open streetscape development set to contain three large anchor stores and a further 20 standard sized units. If granted permission, the total retail floorspace would be approximately 29,700 sq m with an additional 9,000 sq m of leisure.

4.24 Out of town retail development in Ipswich provides an element of retail competition for the six town centres in Suffolk Coastal District. Within the Ipswich eastern fringe, there are two Tesco stores at Kesgrave and Martlesham Heath to the south of Woodbridge, and a Sainsbury's store at Warren Heath. In the comparison goods sector, the main competition is located at Beardmore Park, Martlesham Heath; Euro Retail Park; and a Homebase store on Felixstowe Road adjacent to the Sainsburys at Warren Heath. Details of this retail provision are outlined further in Section 7.

COLCHESTER

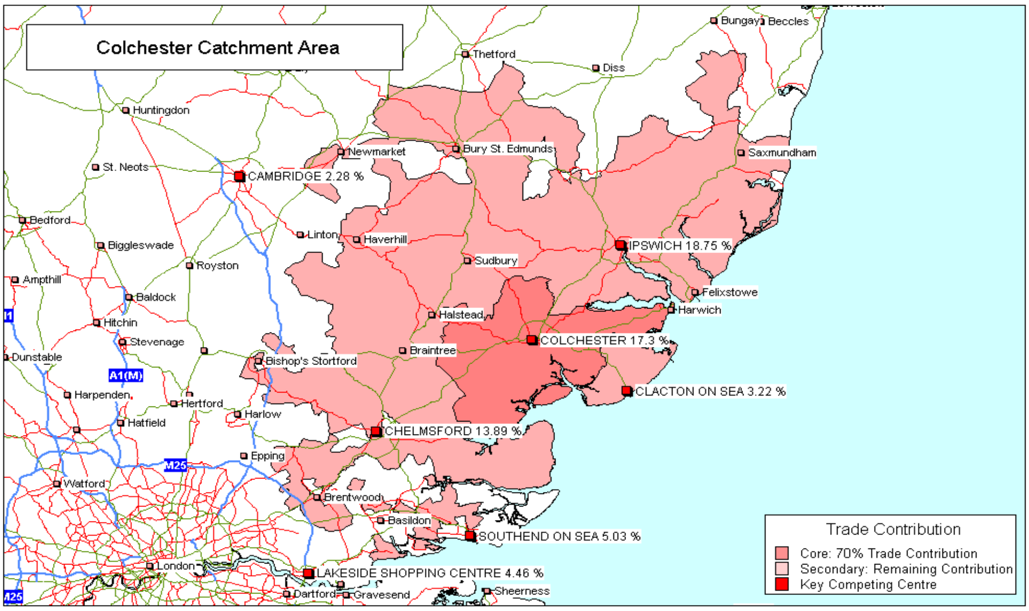
4.25 Colchester is a university and garrison town situated in north Essex. It is evident from Table 4.7 that Colchester is approximately 17 miles (26 minutes) from Ipswich, and a further 10-12 miles from Woodbridge and Felixstowe. Additional competing shopping destinations with Colchester include the Clacton Factory Shopping Village, Freeport Braintree, Chelmsford and Bury St Edmunds. Lakeside, Bluewater and Cambridge are a little over an hours drive from the town centre.

Table 4.7: Main Competition, Drive Times and Distances from Colchester

Town	Minutes	Miles
Clacton Factory Shopping Village	26	16
Ipswich	26	17
Freeport Braintree	31	18
Chelmsford	37	26
Bury St Edmunds	49	31
Lakeside	63	49
Bluewater	71	56
Cambridge	78	63

Source: Retail Promis, February 2003; PMA; MapInfo

4.26 It is evident from the geographical plan below, 'Colchester's Catchment Area', that the town's shopping catchment area is extensive, but predominantly rural. The catchment area includes Felixstowe and Woodbridge; and Saxmundham, Framlingham, Leiston and Aldeburgh are located towards the northern boundary of the catchment area. It is curtailed to the north-east by Ipswich and to the south-west by Chelmsford. The town centre attracts a regular comparison goods shopping population from its catchment of 225,844. This ranks the town centre 59 nationally by size out of more than 4,500 trading locations.



CB Hillier Parker

4.27 Colchester has approximately 92,900 sq m gross of town centre retail floorspace. For a town of this size, it has a relatively good representation of national multiples. The three shopping centres in the town include a range of retail formats. The Culver Square shopping centre opened in 1987 and is the largest of Colchester's shopping centres with a retail floorspace of approximately 31,580 sq m gross. The centre is anchored by Virgin Megastore, Debenhams and Woolworths, and has a number of mid to higher market retailers including Adams Childrenswear, French Connection, Gap, Morgan, Waterstones, Birthdays and the Early Learning Centre.

4.28 Lion Walk is the town's other major centre. It opened in 1976, and has a retail floorspace of approximately 19,380 sq m gross, and is home to a number of the town's key retailers such as BHS, Boots the Chemists, Marks & Spencer, the Body Shop, Accessorise, River Island, WH Smith, HMV and Thorntons. Colchester's third managed scheme, Priory Walk, opened in 1967 with a retail floorspace of approximately 9,290 sq m gross. It is an open-air scheme located in a secondary location on the eastern side of the main shopping area forming a pedestrianised thoroughfare linking Long Wyre Street, Priory Walk and Queen Street. Sainsbury's anchors the shopping centre, and other tenants include Clinton Cards, Holland and Barratt, Peacocks, Superdrug, Smith Butchers and West World.

4.29 Colchester's prime pitch is focused on Culver Walk, and there are many secondary shopping locations and, typical of historic centres, many of the units in Colchester are relatively small. The three department stores include Debenhams, the Independent Williams & Griffin department store, and the Co-op. Convenience provision in the town centre includes a Sainsbury's store in the Priory Walk shopping centre, an Iceland on the edge of the town centre at St Johns Walk and a foodstore within Marks & Spencer.

4.30 In terms of future retail development, the Council's aim is to maintain Colchester town centre as the major economic, social and cultural focus of the Borough, and the Council's retail study identified potential for up to an additional 28,800 sq m by 2011. St Botolph's Quarter, the area around the Queen Street bus station, had been identified as the main location for any new retail development. Future mixed use development on this site is likely to include a new Magistrates Court, a retail scheme and a new visual arts centre. The area is now the subject of a master planning exercise.

4.31 It is evident from Table 4.8 that demand has fallen from a rank position of 50 in October 2000, to 75 in October 2002. Despite this fall, the number of requirements has remained relatively consistent. Allders and House of Fraser are both reported to be interested in the town. Requirements from other retailers seeking representation include Argos, Book World, Car Phone Warehouse, Lakeland, and a number of fashion/clothing retailers including Fat Face, Wallis, Edinburgh Woollen Mill and Free Spirit.

Table 4.8: Colchester Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
73	75	October 2002
70	60	October 2001
75	50	October 2000
63	64	October 1999
68	62	October 1998
74	52	October 1997

Source: Focus Property Intelligence, April 2003

BURY ST EDMUNDS

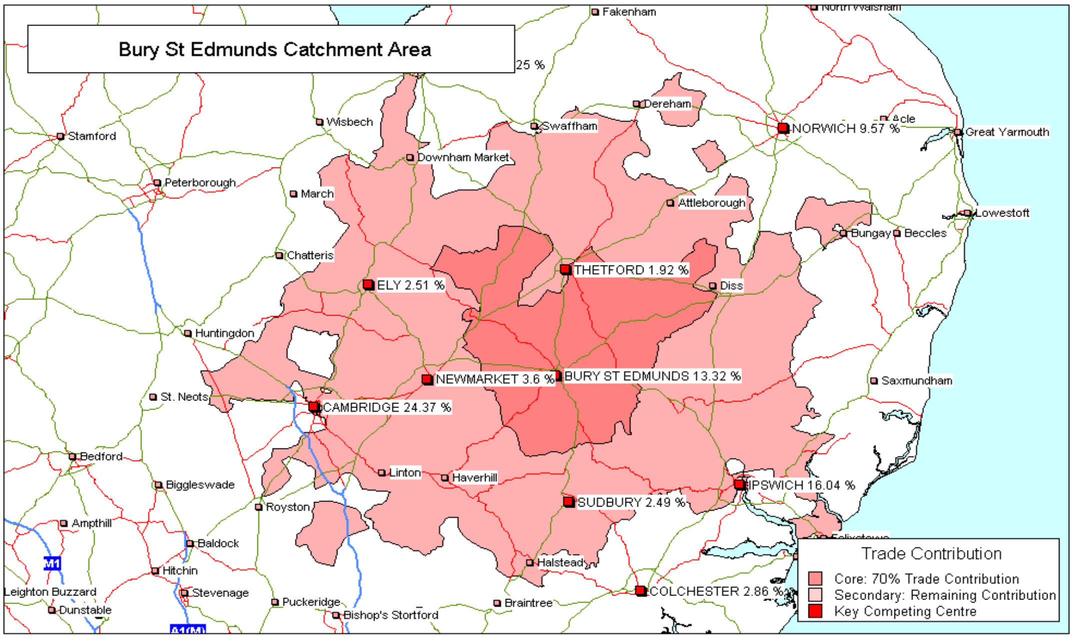
4.32 Bury St Edmunds is the sub-regional centre for West Suffolk. The town centre lies within St Edmundsbury Borough Council and is located approximately 35 miles to the north-west of Ipswich, and a further 10-12 miles from Felixstowe. Cambridge, Colchester and Norwich together with Ipswich are the main competing town centres. Bury St Edmunds had an Experian Goad rank position of 159 in 2001. It has an Experian Goad vitality score of 138 and is the fourth highest ranking centre within the vicinity of Suffolk Coastal District. The town centre's main competitor's are highlighted in Table 4.9.

Table 4.9: Main Competition, Drive Times and Distances from Bury St Edmunds

Town	Miles
Cambridge	41
Colchester	49
Ipswich	35
Norwich	61

Source: Promis Enquiry Report 2003; PMA; MapInfo

4.33 The geographic extent of Bury St Edmunds catchment area can be seen on the Plan below, 'Bury St Edmunds Catchment Area'. The total catchment area extends to Swaffham in the north, Halstead and Sudbury in the south, and beyond Diss in the east. The catchment is constrained to the south-east by Ipswich, the south by Colchester, the west by Cambridge and north east by Norwich. Bury St Edmunds attracts a regular comparison goods shopping population from its catchment of 111,604. This shopping population ranks 138 nationally by size out of more than 4,500 trading locations.



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4.34 Bury St Edmunds has a total centre retail floorspace of just over 67,800 sq m gross. There are currently no shopping centres in Bury St Edmunds and retail tenants in the town centre are largely located in the prime retail area located on Cornhill Walk and Buttermarket. Retailers in Bury St

Edmunds are generally low to mid-market and include Top Shop, Select, La Femme, Etam, Country Casuals and the Edinburgh Woollen Mill.

4.35 Retail provision will be improved if proposals to develop the Cattle Market site go ahead. Centros Miller were selected to work in partnership with St Edmundsbury Council to develop a vision for the former Cattle Market site. Consultation exercises in 2001 and 2002 have been met with support from consultees and the developer is due to submit a detailed planning application in Summer/Autumn 2003. Completion is currently scheduled for 2006. The scheme forms part of a phased extension to the town centre, with a mix of retail and residential uses, arranged around a new public square. The retail element will form approximately 9,755 sq m gross of retail floorspace.

4.36 It is evident from Table 4.10 that retailer demand to locate in Bury St Edmunds has fluctuated between October 1997 and October 2002. Its lowest rank position of 166 occurred in October 2001 when there were just 36 requirements, although this has since risen to its highest ranking since October 1997 of 109 with 58 requirements. This sudden rise suggests increased interest in response to the proposed developments on the Cattle Market site. Retailers that have recently expressed interest in locating in Bury St Edmunds include a number of specialist retailers such as Blockbuster Entertainment, Cobblers, Costa Coffee, Dr China, and Dunelm Soft Furnishings Ltd; as well as fashion/clothing multiples such as Accessorize, Bon Marche, Country Casuals and Peacocks.

Table 4.10: Bury St Edmunds Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
58	109	October 2002
36	166	October 2001
43	138	October 2000
37	151	October 1999
36	156	October 1998
39	144	October 1997

Source: Focus Property Intelligence, April 2003

LOWESTOFT

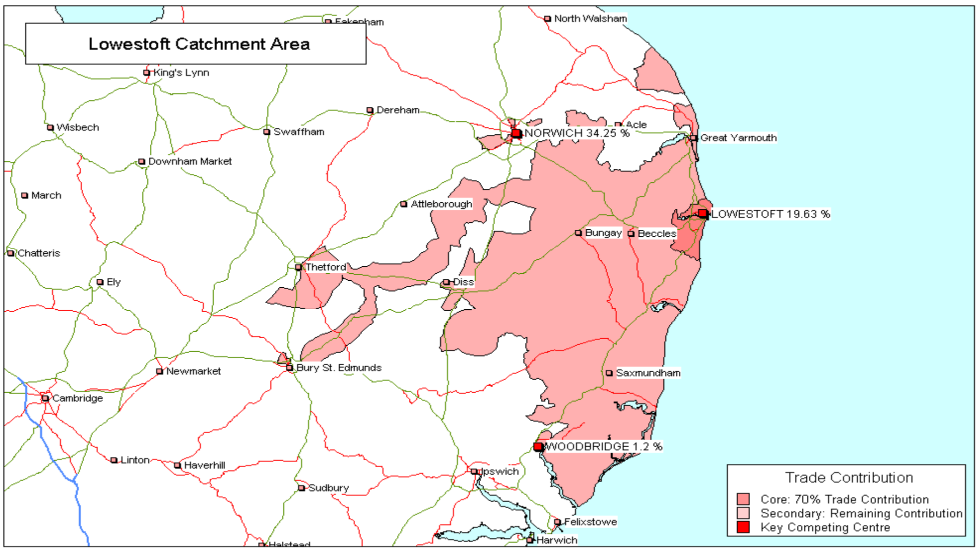
4.37 Lowestoft is located in Waveney District Council approximately 65 miles north of Ipswich. The Experian Goad Retail Rankings, 2001 (Table 4.2) ranked Lowestoft 225 in 2001, with a vitality score of 114. This is the fifth highest ranking centre within the vicinity of Suffolk Coastal District and is followed by Felixstowe with a rank of 357. Lowestoft's main competitor's are highlighted in Table 4.11.

Table 4.11: Main Competition, Drive Times and Distances from Lowestoft

Town	Miles
Great Yarmouth	19
Ipswich	65
Norwich	43

Source: Promis Enquiry Report 2003; PMA; MapInfo

4.38 The geographic extent of Lowestoft's catchment area can be seen on the map below, 'Lowestoft Catchment Area'. It is evident that the core catchment area is extremely tight, largely due to the location of Norwich, 43 miles to the north-west which attracts 34.25% of the Lowestoft catchment residents. Great Yarmouth attracts 14.83% of the catchment population, whilst Ipswich attracts 10.12%. Lowestoft attracts a regular comparison goods shopping population from its catchment of 71,434. This shopping population ranks Lowestoft 186 nationally by size out of more than 4,500 trading locations.



4.39 Lowestoft has approximately 60,000 sq m gross of retail floorspace and the retail offer is more limited than competing centres in the vicinity with fewer national multiples. In addition to high street retailing, The Britten Centre, London Road North, is the only shopping centre in Lowestoft. It opened in 1987 and has a retail floorspace of approximately 9,290 sq m gross. The centre is anchored by BHS and other retailers include Clinton Cards, Dixons, Holland and Barratt, Mothercare, Superdrug and WH Smith. Marks & Spencer also has a store in the town centre.

4.40 A retail study of Waveney District Council was undertaken in 2001. The Study concluded that the District of Waveney could support 6,700 sq m gross of convenience floorspace; 7,300 sq m gross of additional comparison floorspace and 3,600 sq m gross of bulky good and retail warehousing in the period up to 2006. In terms of future retail development four key schemes have been identified in Lowestoft. A mixed use development has been granted outline consent at South Quay. The site lies to the south side of Lake Lothing and is just over 8ha of vacant, derelict and underused land. The development proposal is outlined below (Table 4.12).

Table 4.12: South Quay Development, Lowestoft

Development	Size sq m gross
Food Superstore	6,712
Non Food Retail	9,487
Restaurant	1,406
Business Use	718
Boat Museum	929
Leisure/Play Zone	465
Car Parking	(710 Parking Spaces)

Source: Waveney District Council

4.41 In addition to South Quay, an edge of centre Aldi foodstore on Commercial Road was granted consent on 9th October 2002. Construction of the 1,315 sq m gross foodstore is almost complete. A Co-Op foodstore north of the town centre (980 sq m gross) was granted consent on 21st November 2002, and an out of centre DIY Homebase store and adjacent Pizza Hut has been granted consent on Tower Road.

4.42 It is evident from Table 4.13 that retailer demand to locate in Lowestoft has increased from 16 requirements in October 1997, to 29 requirements in October 2002. This represents a strong increase in rank of 21 places to 223 in October 2002. Retailers that have recently expressed interest in locating in Lowestoft include Adams Childrenswear, Argos, the Carphone Warehouse, Pizza Hut, McDonalds, and Peacocks.

Table 4.13: Lowestoft Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
29	223	October 2002
23	242	October 2001
23	237	October 2000
21	232	October 1999
17	240	October 1998
16	244	October 1997

Source: Focus Property Intelligence, April 2003

STOWMARKET

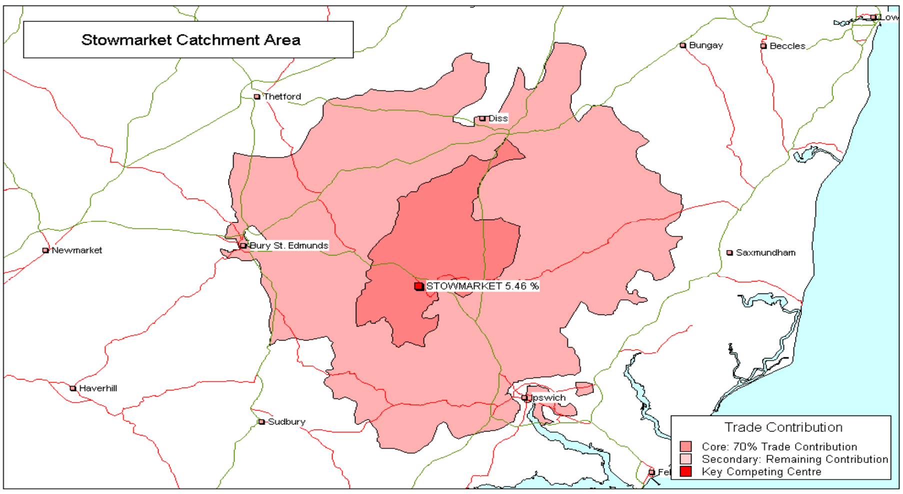
4.43 Stowmarket is located in Mid Suffolk District Council, approximately 13 miles north-west of Ipswich, and 15 miles east of Bury St Edmunds. In 2001, Stowmarket was ranked 486 in the Experian Goad Retail Rankings, 2001, with a vitality score of 72 (Table 4.2). This is the seventh highest ranking centre within the vicinity of Suffolk Coastal District, falling behind Felixstowe. The town centre's main competitor's are highlighted in Table 4.14.

Table 4.14: Main Competition, Drive Times and Distances from Stowmarket

Town	Minutes	Miles
Ipswich	18	13
Bury St Edmunds	18	15
Sudbury	35	19
Thetford	39	23
Chelmsford	58	51

Source: Focus Property Intelligence database, Town Centre Report, 2003

4.44 Stowmarket has a regular comparison goods shopping population of 13,158, ranking the town centre 431 nationally by size, out of more than 4,500 trading locations. The geographic extent of this catchment area is highlighted on the plan below, 'Stowmarket Catchment Area'. The core catchment area is constrained to the west by Bury St Edmunds and to the south and east by Ipswich. The shopping population of Stowmarket is less than Felixstowe but is greater than the other five town centres in Suffolk Coastal District.



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4.45 We have not identified any significant proposals in the pipeline for Stowmarket which are likely to have implications for the six town centres in Suffolk Coastal District.

4.46 Retailer demand to locate in Stowmarket is relatively limited when compared to the 'higher order' competing centres. Retailer demand has fluctuated. In October 2002, there were 7 requirements from retailers to locate in Stowmarket, including Barnado's, Dorothy Perkins, Farm Foods, Julian Graves, McDonalds, Peacocks and Size Up.

Table 4.15: Stowmarket Retailer Demand

No. of Requirements	Ranking (1st highest)	Date
7	569	October 2002
6	539	October 2001
3	716	October 2000
6	490	October 1999
6	483	October 1998
5	518	October 1997

Source: Focus Property Intelligence, April 2003

SUMMARY

4.47 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.

4.48 Norwich, Ipswich and Colchester will reinforce their regional attractions as shopping destinations through the development of the Chapelfield Shopping Centre, the Mint Quarter, and St Botolph's Quarter. We anticipate the strong retailer demand to locate in these centres will continue. The shopping function and offer in Bury St Edmunds will be further enhanced if proposed developments for the Cattle Market site go ahead.

4.49 We have not identified any significant proposals in the pipeline for Stowmarket, but future development in Lowestoft could have implications for retailing in Suffolk Coastal District. The centre is more similar in size and retail offer to the smaller town centres. The attraction of Lowestoft as a shopping destination will be strengthened following the development of the mixed use development at South Quay, two new foodstores and an out of centre DIY store.

5. FELIXSTOWE

5.1 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 serves the whole of the Felixstowe peninsular and has a regular comparison goods shopping population of 18,389. The Edwardian seaside tourist resort, with extensive seafront and tourist attractions, is accessed via the A14.

5.2 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 to the north. This is supplemented by a number of more secondary shopping areas. The area of the town centre south of Cobbold Road is part of a defined conservation area designated in the adopted local plan.

DIVERSITY OF USES

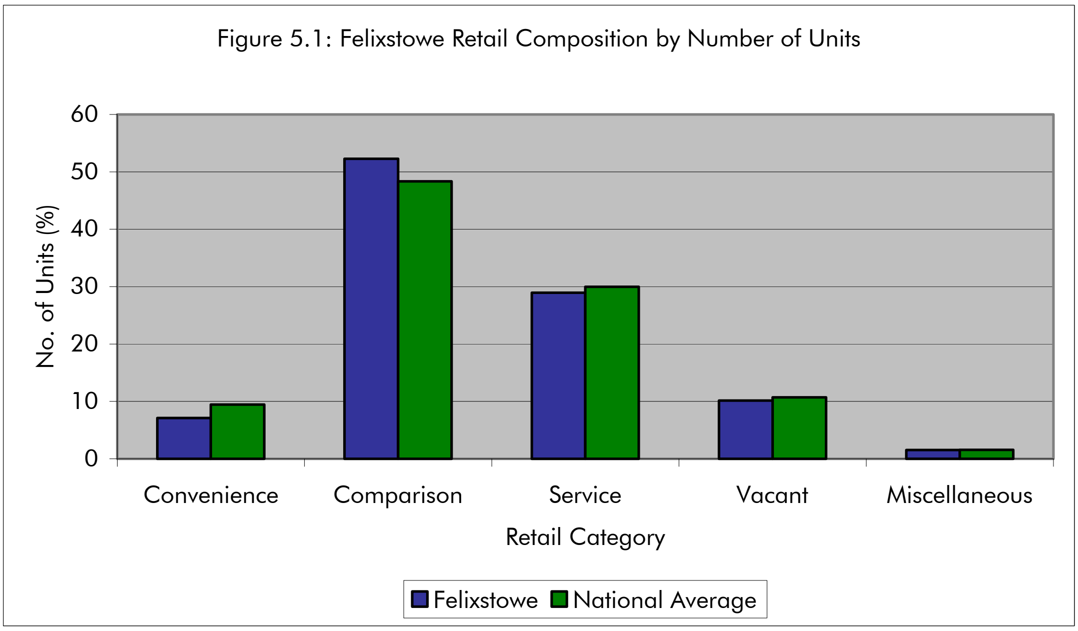
5.3 The Experian Goad Survey (April 2002) of Felixstowe town centre identified a total of 36,880 sq m of ground floor floorspace for retail trade and services, comprising 197 units. It should be noted that the floorspace figures quoted by Experian Goad are neither the net, nor necessarily always the gross area of the outlets. The figures are derived from the Experian Goad Plan and only show the footprint of units, within the building lines.

5.4 Table 5.1 and Figure 5.1 highlight the composition of Felixstowe by the number of units. It is evident that the centre has a below average representation of units occupied by retailers in the convenience, service and miscellaneous (i.e. employment, careers, post offices) categories. The comparison provision at 3.94% above average, suggests that Felixstowe is functioning well as a comparison goods shopping destination.

Table 5.1: Felixstowe Retail Composition by Number of Units

Retail Category	No. of Units	Percentage of Total	National Average (%)	Variants (%)
Convenience	14	7.11	9.44	-2.33
Comparison	103	52.28	48.34	3.94
Service	57	28.93	29.97	-1.04
Vacant	20	10.15	10.70	-0.55
Miscellaneous	3	1.52	1.55	-0.03
TOTAL	197	100	100	

Source: Experian Goad Town Centre Report, April 2002



5.5 In terms of the more detailed breakdown of provision in the convenience category, Felixstowe has a below average representation of 'bakers', 'butchers', 'groceries' and 'frozen foods', 'off licences', and 'cigarette, tobacconist and newsagents (CTN)'. This suggests something of a deficiency in representation of more specialist convenience goods retailers. There is, however, an above average representation of greengrocers and fishmongers, and the market stalls in Great Eastern Square supplement food retail provision in the town centre.

5.6 In terms of comparison goods retailers, Felixstowe has an above average representation in the 'footwear', 'furniture', 'carpets' and 'textiles', 'books and stationers', 'DIY and hardware', 'cars and accessories', 'variety and department stores', 'florists and gardens', 'jewellers' and 'charity' and 'pet shops'. This suggests that for a town centre of its size, Felixstowe is providing a good range of comparison products. The town centre does, however, have a below average representation in the 'men's', 'women's', 'children's' and 'mixed and general' clothing categories, suggesting the strength and influence of Ipswich in the wider catchment area.

5.7 In April 2002, service businesses accounted for 28.93% of all retail units within Felixstowe town centre. The more detailed breakdown highlights that the proportion of retail units occupied by 'travel agents' and 'building societies' is above the national average, whilst the representation of units occupied by 'restaurants and fast food retailers', 'hairdressers', 'laundrettes and dry cleaners', 'banks' and 'estate agents', is generally inline with the national average. This highlights a relatively well balanced provision of service uses.

5.8 For the purposes of this Retail Study and the retail capacity modelling outlined in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Felixstowe is attached in Appendix 1. This identifies a total ground floor gross floorspace of 38,491 sq m (Table 5.2).

Table 5.2: Felixstowe Retail Composition by Retail Category and Floorspace

Retail Category	Floorspace (sq m gross)	% of Total
Comparison	16,769	44
Convenience	6,254	16
Service	7,073	18
Vacant	1,005	3
Miscellaneous	7,390	19
TOTAL	**38,491**	**100**

Source: Suffolk Coastal District Council land use survey, 2002

5.9 Table 5.3 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace figure of 30,781 sq m accounted for by A1, A2 and A3 Uses. A1 shop uses account for 77% of this floorspace. A1, A2 and A3 Uses equate to 80% of total floorspace in Felixstowe town centre. We consider this to reflect a healthy town centre.

Table 5.3: Felixstowe Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1	23,795	77
A2	4,769	15
A3	2,217	8
TOTAL	**30,781**	**100**

Source: Suffolk Coastal District Council land use survey, 2002

RETAILER REPRESENTATION

5.10 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 April 2002, multiple retailers occupied 69 of the total 197 retail units in Felixstowe. This figure compares well with the national average of 34%. These retailers are supplemented with a strong independent sector targeted towards both tourists and the local population.

5.11 Experian Goad highlight 27 key attractors as a benchmark to judge centres against, Felixstowe has 9 of these retailers (Table 5.4). In particular, Felixstowe lacks many of the mainstream clothing retailers and fast food restaurants. Of the 27 key attractors in Felixstowe, 4 are major mixed goods retailers: Boots the Chemist, Marks and Spencer, WH Smith, and Woolworths. These figures highlight a relatively weak representation of key attractors within Felixstowe town centre, reflecting its lower order role within the wider retail hierarchy.

Table 5.4: Key Attractors in Felixstowe Town Centre

Multiple Retailer	No. in Felixstowe Town Centre	Mixed Goods Multiple Retailers	No. in Felixstowe Town Centre
Adams	0	Allders	0
Burger King	0	BhS	0
Burton	1	Boots the Chemist	1
Clarks	1	Debenhams	0
Clintons	0	House of Fraser	0
Dixons	0	John Lewis	0
Dorothy Perkins	1	Marks & Spencer	1
Evans	0	W H Smith	1
McDonalds	0	Woolworths	1
Mothercare	0		
New Look	1		
Next	0		
Our Price	0		
Principles	0		
River Island Clothing Co.	0		
Superdrug	1		
Top Man	0		
Top Shop	0		

Source: Experian Goad Town Centre Report, Felixstowe, April 2002

5.12 There are no modern purpose built shopping centres in Felixstowe town centre. The main multiple retailers in Felixstowe are located on Hamilton Road, between Orwell Road and Cobbold Road. This section of the town centre is defined in the adopted local plan as the 'Prime Shopping Area'. Retailers include Boots the Chemist, WH Smith, Burtons and Dorothy Perkins, Lloyds TSB bank, Woolworths, New Look, Marks & Spencer, Superdrug and Halifax bank. Iceland and the food hall in Marks & Spencer are the main convenience goods retailers in this area.

5.13 The southern end of Hamilton Road between Orwell Road and Wolsey Gardens is characterised by a number of service businesses, including restaurants and hairdressers. Retailers include 'Vogue Hair Co', 'Simone's Barber Shop', 'Scissor Trix Hair', 'China Garden' Chinese Restaurant, 'Bella Roma' Restaurant, 'Sagor Spice' restaurant and 'Bonnet' café. The northern half of Hamilton Road, between Cobbold Road and High Road West and High Road East, is characterised by a strong representation of independent retailers and service businesses. In particular there are a number of travel agents, solicitors and estate agents. A number of charity shops are also located in this area including 'Cancer Research', 'Red Cross' and 'Barnardos'.

5.14 The Co-op Solar supermarket anchors the north of the town centre. It is the main convenience goods destination within Felixstowe town centre with a floorspace of approximately 1,970 sq m net. It is a reasonable sized store with 10 customer check-outs. It provides a good food offer, including fish and hot food counters and a delicatessen. There is also a tobacconist, some non-food kitchenware and a Co-Op bank cashier. A free 250 space car park is located to the rear of the foodstore.

5.15 Food provision in Felixstowe is supplemented with Tesco and Iceland, both located on Hamilton Road. Iceland is located within the Prime Shopping Area on Hamilton Road. The store opened in 1993 and has a net floorspace of approximately 494 sq m. It has four aisles and five customer checkouts and appeared relatively quiet on the day of our site visit. There is a small car park to the rear of the unit accessed from Victoria Street with approximately 10 parking spaces. The Tesco store is located on the junction of Hamilton Road and Cobbold Road and appeared busy when compared to Iceland. The store opened in 1969 and has a net floorspace of approximately 475 sq m. There are six aisles and six customer checkouts, although there are no additional facilities usually found in larger Tesco foodstores, for example, a pharmacy or coffee shop. The remainder of the town centre food retailers are generally small independent convenience retailers.

5.16 Great Eastern Square, a small indoor shopping precinct, is located adjacent to the Co-Op Solar supermarket to the north of the town centre. It provides a pedestrian through route from Hamilton Road to the Co-Op Solar car park and Great Eastern Square Market. The market has between 15-20 stalls selling a range of products including fruit and vegetables, clothing, handbags, stationery and cards, groceries and plants. Felixstowe has only one retail warehouse unit: Homebase DIY and garden centre. It is located adjacent to the Co-op Solar foodstore and car park. The warehouse unit broadens the comparison goods retail offer, contributing to the health of the town centre.

RETAILER DEMAND

5.17 Table 5.5 summarises the change in the number of retailer requirements for Felixstowe (in centre and out of centre), together with the relative change in its rank order. In April 2002, Felixstowe had 9 retailer requirements equating to a rank order of 465. The number of retailer requirements have increased since April 1997 and this is reflected in a reduction in the rank order. This illustrates a strengthening in the role of Felixstowe as a retail location.

Table 5.5: Felixstowe Ranking of Retailer Requirements

Number of Requirements	Ranking (1st Highest)	Date
9	465	April 2002
7	508	April 2001
6	384	April 2000
6	498	April 1999
6	490	April 1998
3	616	April 1997

Source: Property Intelligence plc (April 2003)

5.18 Table 5.6 provides a more detailed picture of the requirements for Felixstowe town centre. In total, the Focus Property Intelligence database identified 13 requirements, including six from comparison retailers, three from convenience retailers and four from service providers. In total, these operators require between 3,190 sq m and 5,583 sq m gross of retail floorspace.

5.19 The requirements include a limited range of lower market clothing retailers. The most significant requirement is for Peacocks clothing store which has a requirement for a store of between 465 sq m gross and 1,094 sq m gross. Other multiple retailers include Claire's Accessories and Millets Leisure. Game Station is the only non-clothing retailer with a requirement for Felixstowe town centre. The computer operator has a requirement for a store of between 65 sq m and 111 sq m gross.

Table 5.6: Felixstowe Town Centre Requirements

	Company	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
1	Claire's Accessories	Clothing	Comparison	A1	46	93
2	D2	Clothing	Comparison	A1	186	232
3	Greewood's	Clothing	Comparison	A1	93	140
4	Millets Leisure Ltd	Clothing	Comparison	A1	140	232
5	Peacock's Stores	Clothing	Comparison	A1	465	1394
6	Game Station	Computers	Comparison	A1	65	111
7	Aldi	Supermarket	Convenience	A1	1161	1161
8	Farm Foods	Supermarket	Convenience	A1	279	465
9	Spar (UK) Ltd	Supermarket	Convenience	A1	93	279
10	Domino's Pizza	Fast Food	Service	A3	84	111
11	Subway	Fast Food	Service	A3	30	111
12	Pizza Hut (UK) Ltd	Restaurant	Service	A3	269	418
13	SFI Group plc	Restaurant	Service	A3	279	836
Total Floorspace Requirements =					**3,190**	**5,583**

Source: Property Intelligence Focus Database plc (April 2003)

5.20 The Focus Database identifies three convenience retailer requirements for Felixstowe. They are all national multiple retailers. Aldi have the largest requirement for a store of 1,161 sq m gross. In general, and given the level of competition for sites, the main convenience store operators do publish their requirements on national databases. Our targeted survey therefore contacted these retailers directly.

5.21 The Focus Database identifies four service operator requirements for Felixstowe. These include two fast-food retailers and two restaurants. This is a relatively limited level of demand unlikely to significantly improve the evening economy in Felixstowe. The exact locations of these operators within Felixstowe should be a matter for more detailed consideration, particularly in relation to the primary shopping frontages of the centre. The Focus Database did not identify any requirements for edge or out of centre locations in Felixstowe.

5.22 The CB Hillier Parker targeted survey of retailers identified five requirements for Felixstowe which equates to a floorspace of between 1,262 sq m and 2,015 sq m gross (Table 5.7). The survey identified four comparison retailers including two clothing retailers, one computer software retailer and one video hire shop. The survey did not identify any further requirements from food retailers, but did identify one requirement from an A3 service retailer for restaurant use.

Table 5.7: Felixstowe Town Centre Requirements, CB Hillier Parker Targeted Survey

	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
1	Clothing	Comparison	A1	158	232
2	Clothing	Comparison	A1	465	929
3	Computers	Comparison	A1	111	186
4	Video	Comparison	A1	232	372
5	Restaurant	Service	A3	296	296
Total Floorspace Requirements =				1,262	2,015

Source: CB Hillier Parker Targeted Survey, April 2003

SHOPPING RENTS

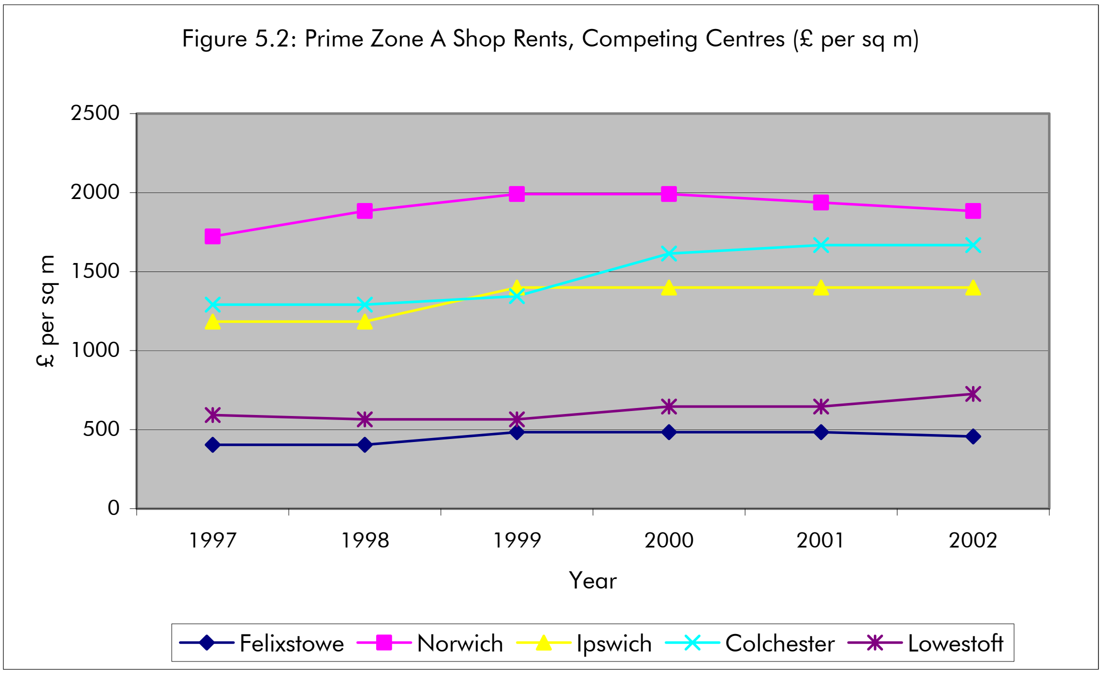
5.23 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Whilst rental values can also provide a measure of the primacy of streets and locations in a town centre, we have drawn on the CB Hillier Parker Investment Research database, which focuses on Prime Zone A rental values. As such, we cannot compare rental values in different parts of Felixstowe, but comparisons are drawn with regional and national averages.

5.24 Prime Zone A shop rents in Felixstowe and competing centres are outlined in Table 5.8 and Figure 5.2. Prime Zone A shop rents in Felixstowe were recorded in May 2002 as being £457 per sq m compared with £1,883 per sq m in Norwich, £1,399 per sq m in Ipswich and £1,668 per sq m in Colchester. Rental levels in Felixstowe are more in line with lower order centres, for example Lowestoft which recorded a Prime Zone A rental value of £726 in May 2002. Rental levels reflect the higher order role of the competing centres relative to Felixstowe.

Table 5.8: Prime Zone A Shop Rents, Competing Centres (£ per sq m)

	May 97	May 98	May 99	May 00	May 01	May 02
Felixstowe	404	404	484	484	484	457
Norwich	1,722	1,883	1,991	1,991	1,937	1,883
Ipswich	1,184	1,184	1,399	1,399	1,399	1,399
Colchester	1,291	1,291	1,345	1,614	1,668	1,668
Lowestoft	592	565	565	646	646	726

Source: CB Hillier Parker Research



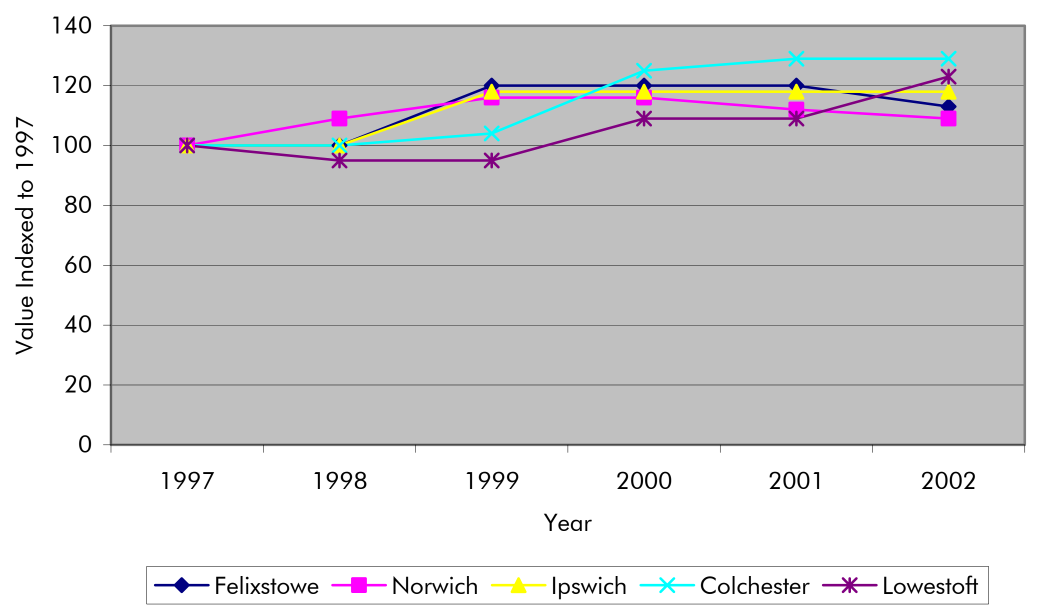
5.25 We have converted Prime Zone A rental values to an index using May1997 as the base position. It is evident that between May 1997 and May 2002, prime Zone A shop rents in Felixstowe have risen slower than in each of the competing centres except Norwich (Table 5.9 and Figure 5.3). In May 2002, the rental indices for Felixstowe had risen by only 13% compared with 18% in Ipswich, 29% in Colchester and 23% in Lowestoft. It is evident that Norwich had the slowest increase of only 9%.

Table 5.9: Prime Zone A Shop Rents (Indexed)

	May 97	May 98	May 99	May 00	May 01	May 02
Felixstowe	100	100	120	120	120	113
Norwich	100	109	116	116	112	109
Ipswich	100	100	118	118	118	118
Colchester	100	100	104	125	129	129
Lowestoft	100	95	95	109	109	123
All Shops Average	100	109	118	127	131	133
Eastern	100	103	110	124	127	130

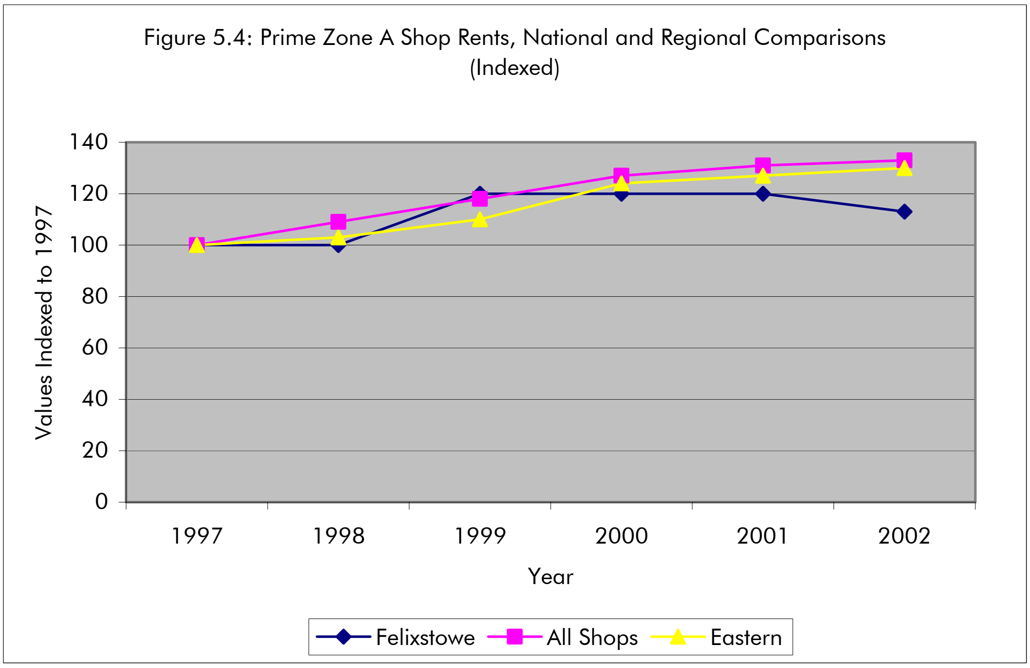
Source: CB Hillier Parker Research

Figure 5.3: Prime Zone A Shop Rents, Competing Centres (Indexed)



5.26 Felixstowe experienced a rapid increase of 20% in Prime Zone A shop rents between May 1997 and May 1999. Rents remained stable until May 2001, but have since fallen. Whilst rental values are below competing centres, the recent growth and relative stability since May 1998 suggests a healthy town centre, where competition for retail space during this time has prevented rents from experiencing any significant falls.

5.27 We have compared prime shop rental levels in Felixstowe with CB Hillier Parker national and regional averages (Table 5.9 and Figure 5.4). It is evident that since May 1997, Prime Zone A rental levels in Felixstowe have risen at a significantly slower rate than regional and national averages which have both growth fairly consistently over the last 5 years. This suggests that, in terms of competition for retail floorspace, Felixstowe is not performing as well when compared to national and regional averages.



COMMERCIAL YIELDS

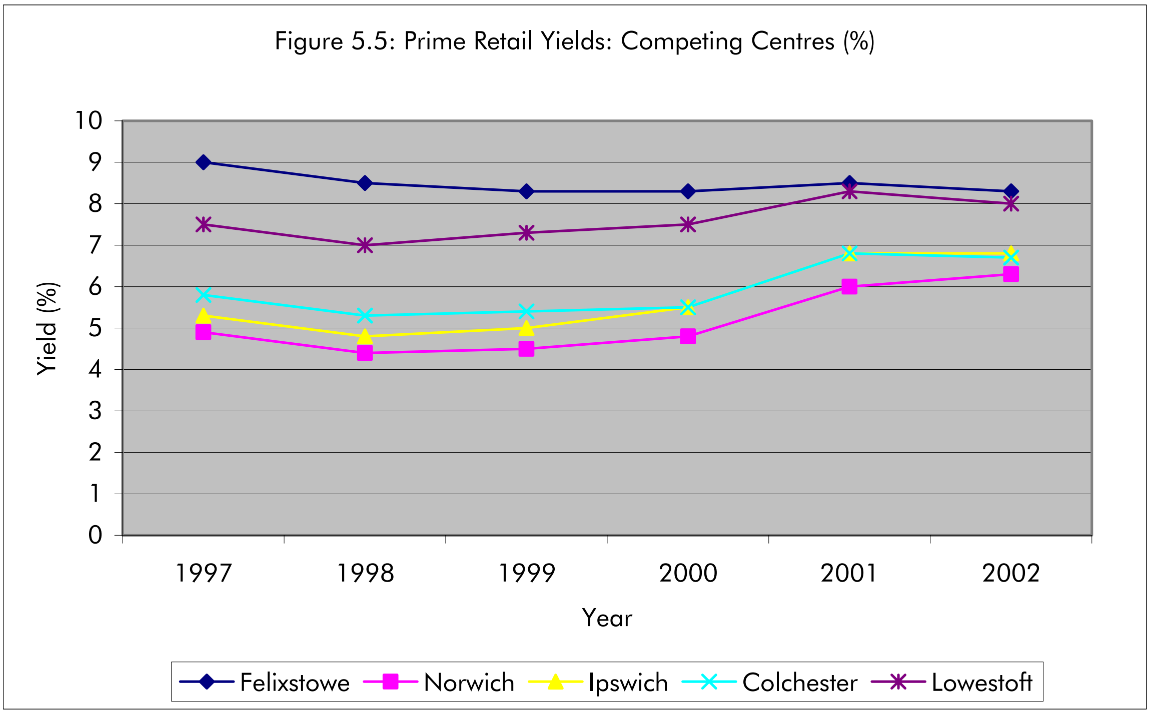
5.28 The commercial yield on non-domestic property is an indication of the confidence of investors in the long-term profitability of the town centre. However, both the Government and the RICS have warned that this requires careful analysis and its limitations must be understood. Yield on property investment represents the return (in the form of rent) on capital to an investor. As property investments do not usually produce a fixed income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect of 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.

5.29 Table 5.10 and Figure 5.5 compares yields in Felixstowe with the main competing centres in the wider catchment. Felixstowe currently has the highest (or poorest) yield of all five centres at 8.3% in May 2002. Norwich has the lowest (i.e. best) at 6.3%. These figures again reflect the lower order function of Felixstowe within the wider retail hierarchy.

Table 5.10: Comparison of Prime Retail Yields (%)

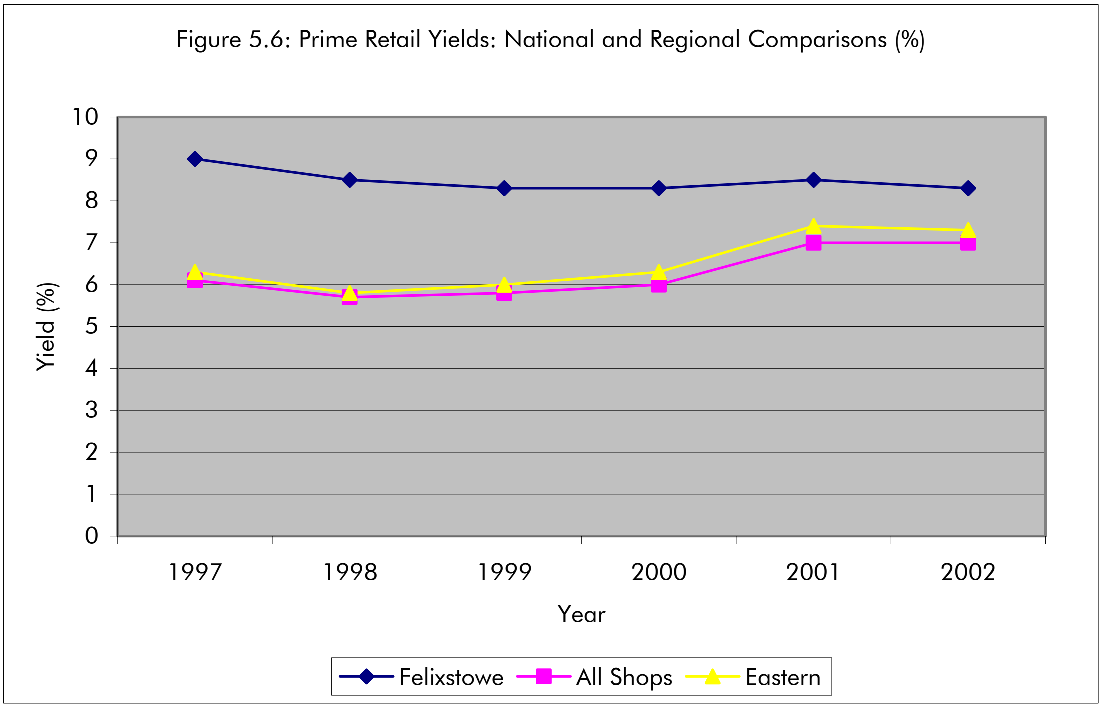
	May 97	May 98	May 99	May 00	May 01	May 02	Change
Felixstowe	9	8.5	8.3	8.3	8.5	8.3	-0.75
Norwich	4.9	4.4	4.5	4.8	6.0	6.3	+1.4
Ipswich	5.3	4.8	5.0	5.5	6.8	6.8	+1.5
Colchester	5.8	5.3	5.4	5.5	6.8	6.7	+0.9
Lowestoft	7.5	7.0	7.3	7.5	8.3	8.0	+0.5
All Shops	6.1	5.7	5.8	6.0	7.0	7.0	+0.9
Eastern	6.3	5.8	6.0	6.3	7.4	7.3	+1.0

Source: CB Hillier Parker Research



5.30 Prime retail yields in Felixstowe were at their highest in May 1997 (9%) and have since improved to 8.3% in May 2002. Between May 1997 and May 2002, prime retail yields in Felixstowe have fallen (or improved) by 0.75%. In contrast, prime retail yields in each of the competing town centres have all increased, although still remain lower than Felixstowe.

5.31 Table 5.10 and Figure 5.6 compares prime retail yields in Felixstowe with national and regional averages. In May 2002, prime retail yields in Felixstowe at 8.3%, are above the national average of 7% and the regional average of 6.9%. Expectations of the general economic prospects for Felixstowe town centre are, therefore, below average.



VACANT RETAIL PROPERTY

5.32 The proportion of vacant street level property is one of the relevant indicators which can be used when assessing the vitality and viability of a town centre. It should be used with caution, as vacancies can arise even in the strongest town centres, particularly where properties are under alteration.

5.33 Table 5.11 indicates that according to the Experian Goad Survey (April 2002), there were 20 vacant units in Felixstowe, equating to a floorspace of 2,040 sq m. The proportion of vacant outlets equates to a vacancy rate of 10.15% of total units in the town centre which is in line with the national average of 10.70%. This particular vitality indicator suggests Felixstowe is performing adequately.

Table 5.11: Vacant Units, Felixstowe, April 2002 – by Unit and Floorspace

Vacant Units	Percentage of Total Units	National Average (%)	Sq m	% of Total Floorspace	National Average (%)
20	10.15	10.70	2,040	8.82	8.24

Source: Experian Goad Town Centre Report, Felixstowe, April 2002

5.34 CB Hillier Parker's On-Site Survey, April 2003, updated the Experian Goad data. The survey highlighted that the number of vacant retail units has fallen from 20 in April 2002, to 6 in April 2003. Of the 20 original vacant units in April 2002, 15 have been reoccupied as illustrated in Table 5.12. One unit has become newly vacant since the Experian Goad survey in April 2002. This level of reoccupation highlights that Felixstowe is currently experiencing few problems in uptake. Retailers that have re-occupied vacant units are, however, largely service providers and smaller comparison goods retailers. Two units have been re-occupied by charity shops.

Table 5.12: Re-occupied Units Since April 2002

	Retail Category/Description	Address	Use
1	Baby clothing	20 Orwell Road	Comparison
2	Photography processing	63 Hamilton Road	Comparison
3	Spec Savers	90 Hamilton Road	Comparison
4	Christian charity shop	118A Hamilton Road	Comparison
5	Charity shop	144 Hamilton Road	Comparison
6	Insurance brokers	94 Hamilton Road	Miscellaneous
7	Dwelling	25 Orwell Road	Residential
8	Thai restaurant	2A Bent Hill	Service
9	Deli bar	42-44 Hamilton Road	Service
10	Estate agents	84 Hamilton Road	Service
11	Hair and beauty	107 Hamilton Road	Service
12	Estate agents	148 Hamilton Road	Service
13	Fast food take-away outlet	164 Hamilton Road	Service
14	Coffee shop	175 Hamilton Road	Service

Source: Experian Goad (April 2002) and CB Hillier Parker On-Site Survey (April 2003)

5.35 Table 5.13 provides an historical overview of vacancy rates in Felixstowe town centre since 1997. Figures have been derived from Suffolk Coastal District Council land use surveys. It is evident that between 1997 and 2002, the number of vacant units in Felixstowe town centre has fluctuated between 13 and 17. These figures reflect the stability in attractiveness and strength of Felixstowe town centre as a location for retailers. In particular, the vacancy rate since 2001 (13) is the lowest since 1997 and CB Hillier Parker's On-Site Survey has highlighted that this figure has since reduced again to only 6 vacant units in April 2003.

Table 5.13: Vacant Units, Historical Data, Felixstowe Town Centre

Year	No. of Vacant Units
1997	14
1998	17
1999	15
2000	16
2001	13
2002	13

Source: Suffolk Coastal District Council

5.36 Vacant units are scattered throughout Felixstowe town centre and there appears to be no particular problem areas struggling to maintain retailer occupation. The most recent survey (April 2003) highlighted that there are no longer any vacant units on the Prime Shopping Area on Hamilton Road. Vacancies are therefore concentrated in more secondary shopping areas in the town centre, notably Orwell Road and the northern area of Hamilton Road.

PEDESTRIAN FLOWS

5.37 The numbers and movements of people in different parts of the town is a useful indicator of the relative strength of different areas; it is therefore important in providing guidance on how parts of the town would be affected by different actions and improvements. We have reviewed pedestrian movements in Felixstowe town centre using pedestrian flow counts taken by Suffolk Coastal District Council in July 2002 (Table 5.14).

Table 5.14: Pedestrian Flows, Felixstowe Town Centre July 2002

Location	Address	Pedestrian Flow Count
Co-op Chemist/Optician – Saxon Upholstery	181-185 Hamilton Road	719
(Triangle) – Britannia Building Society	92 Hamilton Road	943
Russell Smith – TSB	53 & 48-50 Hamilton Road	1,915
Greyfriars – Avenue Fashions	13-15 Hamilton Road	593

Source: Suffolk Coastal District Council

5.38 It is evident from the counts that the highest pedestrian movements in Felixstowe town centre are on the Prime Shopping Area on Hamilton Road between Russell Smith ladies wear on the west side and Lloyds TSB bank on the east side. This area is where the majority of major multiple retailers are located providing a strong pull for shoppers. The second highest count was taken outside Britannia building society (92 Hamilton Road) just to the north of the pedestrianised area, close to the Tesco foodstore and many of the town's service businesses including banks and estate agents.

5.39 The survey point outside the 'Co-op' chemist to the north of Hamilton Road recorded a relatively high count reflecting the pull of the Co-Op Solar supermarket, Homebase store and free car park in this area of the town centre. The lowest pedestrian movements were observed outside 'Greyfriars Carpets and Flooring' to the south of Hamilton Road which is characterised by a number of restaurants and hairdressers.

5.40 Our analysis of the District Council's survey data suggests that there has not been any significant shift in the focus of retail activity in the town centre since 1997, and that Hamilton Road, between Orwell and Cobbold Road continues to be the principal retailing area in the town centre.

ACCESSIBILITY

5.41 Felixstowe town centre is located on the coast of the Felixstowe peninsular, but is well connected to the local and primary road network. The A14 links the town centre directly with Ipswich and primary road networks. In particular, the A12 provides routes north-east through the District towards Lowestoft, and south-west into Colchester, Chelmsford and London. The A14 by-passes Felixstowe town centre to the west providing a fast route to The Port of Felixstowe.

5.42 Felixstowe also benefits from good public transport provision. Bus services link Felixstowe to Ipswich town centre, Ipswich Hospital and a number of destinations throughout the Felixstowe peninsular, including Grange Farm, Trimley and Nacton Road. Services run up to four times an hour during busy times of the day. Bus departure and arrival points are located towards the north of the town centre on Hamilton Road and by-pass the Prime Shopping Area in the south.

5.43 Felixstowe train station is located to the far north of the town centre, accessed via Railway Approach. The station is adjacent to Homebase and the Co-op Solar Supermarket, and is only a short walk from retail frontages. Its location on the rail network ensures Felixstowe has good access to major destinations throughout the country, including London, Norwich and Ipswich.

5.44 Traffic flow in Felixstowe town centre appeared relatively heavy with short stay on-street parking available on a number of shopping streets including the Prime Shopping Area. Pedestrian movements and linkages between retail units are restricted by heavy vehicular usage on Hamilton Road and measures to ensure pedestrian priority could help enhance the environment of the town centre.

5.45 It is evident from the Felixstowe Experian Goad Paper Plan, April 2002, and CB Hillier Parker's On-Site Survey, April 2003, that Felixstowe town centre has a number of car parks. These are detailed in Table 5.15. In total there are approximately 743 parking spaces within the town centre in designated car parks. Car parks appeared busy on the day of our site visit, although they were not heavily congested. On-street parking is located throughout the town centre, and some private car parks are located to the rear of retail units.

Table 5.15: Car Parks, Felixstowe Town Centre

Location	No. of Spaces
Crescent Road	142
Highfield Road	126
Ranelagh Road	215
Co-Op/Homebase	250
Iceland, Victoria Street	10
TOTAL	743

Source: Suffolk Coastal District Council and Experian Goad Town Centre Report, April 2002

ENVIRONMENTAL QUALITY

5.46 Felixstowe town centre developed as a spa and seaside resort in the nineteenth century, and today the Victorian and Edwardian style of architecture is apparent, giving Felixstowe its individual character. The southern part of the town centre has consequently been designated a conservation area to preserve this heritage. The beach, located south of the main retail frontages, is designated with a 'Blue Flag' due to its cleanliness, safety and nearby amenities. The seafront spa gardens are well maintained and contribute significantly to the environment.

5.47 The overall environment of Felixstowe town centre is relatively good with a number of attractive buildings, planting, and historic features. This is, however, mixed with a number of more modern, less attractive buildings, and evidence of lack of investment in shop frontages. This is particularly the case in more secondary areas such as buildings on Hamilton Road to the north of Cobbold Road. The most attractive retail units are located in the Prime Shopping Area, although these are dispersed with a small number of more modern, and in some cases dilapidated, units.

5.48 The pedestrian 'triangle' located outside Tesco on the junction with Hamilton Road and Cobbold Road has visibly benefited from recent investment and maintenance. It now forms an attractive focal point through landscaping, grassed areas, planting of trees and shrubs, and pleasant seating areas. An extension of this type of project throughout the town centre would be beneficial for shoppers, businesses and visitors.

5.49 Further consideration to pedestrianisation within the Prime Shopping Area would add significantly to the town centre environment ensuring pedestrian safety, excellent linkages between retail units and a 'car free' Zone. Although current traffic and congestion is not a significant problem it does detract from a pedestrian friendly shopping environment and the potential for further landscaping, seating and planting. There is evidence of investment in traffic calming measures, but pedestrian crossing points could perhaps be extended to more frequent locations.

Felixstowe Out of Centre

Safeway, Grange Farm Avenue

5.50 Felixstowe has one main foodstore outside the town centre boundary. The Safeway store is located 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 with excellent accessibility on the primary road network. Its location just off the A14 ensures easy access from the whole of the Felixstowe Peninsula. Adjacent uses in this residential area include the 'Owl and Pussycat' public house, Elite Hair & Beauty, and a charity shop.

5.51 The Safeway store opened in 1990 and has a floorspace of approximately 2,323 sq m net. It has a good food offer including a bakery and delicatessen. In addition to the standard non-food cleaning products and toiletries there is a small element of gardening equipment and furniture. Kiosks inside the store include a tobacconist and pharmacy. Other customer facilities include two cast points, an in-store Post Office and toilets. A Safeway 'Quick Shop', petrol station and car wash are located adjacent to the customer car park.

Summary

5.52 In summary, we consider Felixstowe is a vital and viable town centre. The retail offer provides the local shopping catchment and tourist population with a good range of shopping facilities.

5.53 Whilst Felixstowe has an above average representation of comparison goods retailers, it does not have a department store and there is a weak representation of quality multiple retailer representation. This reflects the strength and influence of Ipswich, a higher order centre. Opportunities to attract further multiple retailers are constrained due to the generally small size of retail units. These units could meet the requirements of quality independent retailers more fully.

5.54 Collectively, the Co-Op Solar, Tesco, Iceland and out of centre Safeway provide the local population with a relatively good choice and range of food shopping facilities. We consider, however, that convenience goods provision in Felixstowe could be qualitatively improved to the benefit of the local population. Service business representation is generally in line with the national average highlighting a relatively well balanced provision of service uses.

5.55 Prime retail rents and yields in Felixstowe are not as strong as in the larger competing centres. The town centre performs a more local shopping function, and the figures reflect the lower order position of Felixstowe in the wider catchment retail hierarchy. Rents and yields in Felixstowe have improved, however, since 1997. Vacancy rates are in line with the national average suggesting the town centre is experiencing no serious problems in attracting and maintaining retailers. Surveys highlighted a high level of re-occupation, although a large proportion of new retailers are service providers.

5.56 Our analysis of pedestrian flows in Felixstowe suggests that there has not been any significant shift in the focus of retail activity in the town centre since 1997, and that Hamilton Road, between Orwell and Cobbold Road continues to be the principal retailing area in the town centre. The Co-Op Solar and Homebase remain a strong pull in the north of the town centre.

5.57 Felixstowe town centre developed as a spa town and seaside resort in the nineteenth century. The southern part of the town centre has consequently been designated a conservation area to preserve this heritage. There are a number of more modern, less attractive buildings which could be enhanced through investment. The ‘triangle’ has visibly benefited from recent investment creating an attractive landscaped focal point. An extension of this type of project together with opportunities for pedestrianisation would add significantly to the town centre environment.

6. WOODBRIDGE

6.1 Woodbridge is a typical traditional market town with an attractive shopping environment characterised by a number of historic listed buildings of great variety and quality of architectural style. It's unique historic form and character has resulted in the town becoming one of a number of important tourist centres. The town centre has been designated a conservation area.

6.2 Woodbridge is located just off the A12 to the north of Ipswich and Felixstowe, and south of Aldeburgh, Saxmundham, Framlingham and Leiston. The town centre is in close proximity to Ipswich. The main shopping provision in Woodbridge is located on the Thoroughfare and Church Street, traditional linear high streets; and Market Hill, the traditional market square. There are two small shopping centres: Gobbitts Yard and the Turban Shopping Centre, both accessed from the Thoroughfare.

DIVERSITY OF USES

6.3 The Experian Goad Survey (April 2001) of Woodbridge town centre identified a total of 28,610 sq m of ground floor floorspace for retail trade and services, comprising 166 units. The floorspace figures quoted by Experian Goad are neither the net, nor necessarily always the gross area of the outlets. The figures are derived from the Experian Goad Plan and only show the footprint of units, within the building lines.

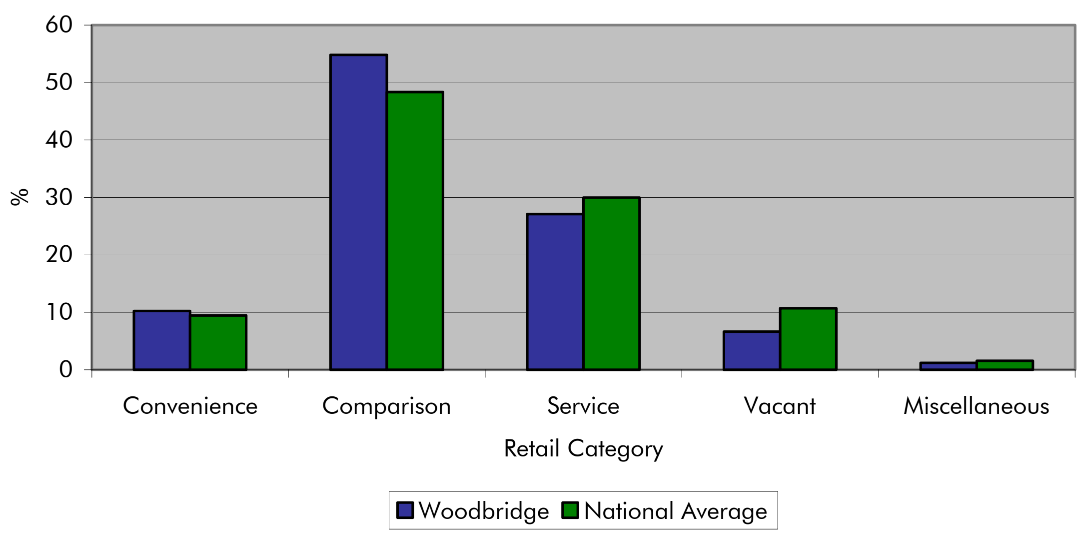
6.4 Table 6.1 and Figure 6.1 highlight the composition of Woodbridge by the number of units. It is evident that the centre has a below average representation of units occupied by retailers in the service and miscellaneous (i.e. employment; careers; post offices) categories and an above average provision of units in the convenience and comparison categories. The comparison provision at 6.48% above average suggests that Woodbridge is functioning well as a comparison goods shopping destination.

Table 6.1: Woodbridge Retail Composition by Number of Units

Retail Category	No. of Units	Percentage of Total	National Average (%)	Variance (%)
Convenience	17	10.24	9.44	0.8
Comparison	91	54.82	48.34	6.48
Service	45	27.11	29.97	-2.86
Vacant	11	6.63	10.70	-4.07
Miscellaneous	2	1.20	1.55	-0.35
TOTAL	166	100	100	

Source: Experian Goad Town Centre Report, April 2001

Figure 6.1: Woodbridge Retail Composition by Number of Units



6.5 In terms of the more detailed breakdown of convenience provision, Woodbridge has an above average representation of 'bakers', 'butchers', 'groceries and frozen foods' and 'off licences'. This suggests a strong representation of more specialist convenience goods retailers. Woodbridge does, however, have a below average representation of 'greengrocers and fishmongers' and 'CTN' retailers. This strong representation of convenience goods retailers, and in particular specialist convenience goods retailers, is typical of market towns which tend to be more reliant on their convenience shopping function than larger shopping centres.

6.6 In terms of comparison goods retailers, Woodbridge has an above average representation of 'furniture, carpets and textiles', 'books, arts/crafts and stationers', 'DIY, hardware and household goods' and 'gifts, china and glass'. This reflects in the high proportion of antique and specialist furniture shops in Woodbridge town centre, and the nature of retailing targeted towards the tourist population. In contrast, clothing retailers are generally in line with the national average whilst the representation of 'cars and accessories', 'chemists and toiletries', 'variety and department stores', 'toy shops' and 'charity and pet shops' are all below the national average.

6.7 In April 2001, service businesses accounted for 27.11% of all retail units within Woodbridge town centre. The more detailed breakdown highlights that the proportion of retail units occupied by 'hairdressers', 'laundrettes and dry cleaners', 'building societies', and 'estate agents and auctioneers' are all well above the national average. In particular, the proportion of building societies is more than double the national average. In contrast, Woodbridge has a below average representation of 'restaurants, cafes and fast food outlets', 'travel agents' and 'banks and financial services'.

6.8 For the purposes of this Retail Study and the retail capacity modelling outlined in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Woodbridge is attached in Appendix 1. This identifies a total ground floor gross floorspace of 22,827 sq m (Table 6.2).

Table 6.2: Woodbridge Retail Composition by Retail Category and Floorspace

Retail Category	Floorspace (sq m gross)	% of Total
Comparison	8,759	38
Convenience	2,443	11
Service	5,159	23
Vacant	1,029	4
Miscellaneous	5,437	24
TOTAL	**22,827**	**100**

Source: Suffolk Coastal District Council land use survey, 2002

6.9 Table 6.3 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace figure of 17,060 sq m accounted for by A1, A2 and A3 Uses. A1 shop uses account for 74% of this floorspace which is only marginally below the proportion in Felixstowe. We consider this reflects a healthy centre. A1, A2 and A3 Uses equate to 75% of total floorspace in Woodbridge town centre.

Table 6.3: Woodbridge Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1	12,619	74
A2	2,714	16
A3	1,727	10
TOTAL	17,060	100

Source: Suffolk Coastal District Council land use survey, 2002

RETAILER REPRESENTATION

6.10 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 April 2001, multiple retailers occupied 36 (22%) of the total 166 retail units in Woodbridge. This figure is below the national average of 34%. This proportion of multiples is relatively weak. The strength of Woodbridge is the more diverse independent sector, including household goods, antique and specialist furniture retailers. These types of retailers contribute significantly to the town centre's vitality and prosperity drawing in both tourists and the local population.

6.11 Experian Goad highlights 27 key attractors as a benchmark to judge centres against. Woodbridge has only two of these retailers (Table 6.4). The key mainstream retailers and fast food outlets are all absent from Woodbridge and the two attractors represented are both mixed goods multiple retailers including 'Boots the Chemist' and 'Woolworths', both located on the primary shopping frontage. Woodbridge does not have any department stores.

Table 6.4: Key Attractors in Woodbridge Town Centre

Multiple Retailer	No. in Woodbridge Town Centre	Mixed Goods Multiple Retailers	No. in Woodbridge Town Centre
Adams	0	Allders	0
Burger King	0	BhS	0
Burton	0	Boots the Chemist	1
Clarks	0	Debenhams	0
Clintons	0	House of Fraser	0
Dixons	0	John Lewis	0
Dorothy Perkins	0	Marks & Spencer	0
Evans	0	W H Smith	0
McDonalds	0	Woolworths	1
Mothercare	0		
New Look	0		
Next	0		
Our Price	0		
Principles	0		
River Island Clothing Co.	0		
Superdrug	0		
Top Man	0		
Top Shop	0		

Source: Experian Goad Town Centre Report, April 2001

6.12 The Thoroughfare, between Church Street and Elmhurst Walk, including Hamblin Walk, is identified as the Prime Shopping Area in the adopted local plan. The main multiple retailers in Woodbridge are located within the Prime Shopping Area. Retailers include 'Boots the Chemist', 'Stead and Simpson shoes', 'Wine Rack', 'Peacocks Clothing', 'Woolworths' and 'Currys Electrical Appliances'. 'HSBC', 'Lloyds TSB' and a small representation of building societies, travel agents and estate agents are also located on this stretch of the Thoroughfare.

6.13 The two small shopping centres in Woodbridge are accessed from the Prime Shopping Area. The Turban Shopping Centre is a pleasant pedestrianised area, with a number of specialist retailers including a bookshop, butchers, greengrocers and a carpet and flooring retailer. Budgens foodstore, the largest food retailer in the town centre, and the Post Office anchors the Turban Shopping Centre. Budgens opened in 1983 and has a gross retail floorspace figure of 1,155 sq m (635 sq m net). The store has a reasonable food range including a delicatessen, and the six aisles are dedicated entirely to food provision. A planning application to extend the Budgen's foodstore has been granted permission subject to completion of a Section 106 Agreement.

6.14 Budgens benefits from public car parking to the rear of the store on Hamblin Road (252 parking spaces). The weekly market, once located in Market Hill, now takes place in part of the Hamblin Road car park and supplements retailer representation with a range of food and flower stalls.

6.15 Gobbitts Yard Shopping Centre is located further west along the Thoroughfare. The access is located between the Britannia building society (No.22) and Thomas Cook travel agent (No.20A). Units are smaller than elsewhere in the town centre and occupants include a range of small independent retailers including hairdressers, gift shops, haberdashery, ladies wear and a restaurant. CB Hillier Parker's On-Site Survey (April 2003) identified two vacant outlets in Gobbitts Yard.

6.16 The Co-op foodstore supplements general convenience goods provision in the town centre. It is located on the Thoroughfare (No. 27) within the Prime Shopping Area. The store opened in 1982 and has a gross floorspace of approximately 215 sq m, and a sales floorspace of approximately 140 sq m. The store provides a modest range of food products including a quality delicatessen. The small unit has two aisles and three customer checkouts. It is closed on Sundays.

6.17 Church Street links the Thoroughfare with Market Hill to the west of the town centre. This shopping area, outside the Prime Shopping Area, is characterised by a number of solicitors, estate agents, travel agents and antique retailers. Convenience and comparison goods retailer representation on Church Street is limited.

6.18 Church Street leads into Market Hill to the far west of the town centre. It is an attractive market square with retail units facing inwards on each side. The unit mix in this shopping area is more varied with a range of dwellings, public houses, church buildings and retail units. Retailers located on Market Hill are smaller specialist retailers including antique dealers, hairdressers and units selling ladies clothing and musical instruments.

6.19 Woodbridge town centre does not have a strong evening economy, limited to a small range of restaurants and public houses. The tourist market could provide opportunities to extend such provision.

RETAILER DEMAND

6.20 Table 6.5 provides a detailed picture of the retail requirements for Woodbridge town centre drawn from the Property Intelligence Focus Database. In total, the database identified five requirements, including four from comparison retailers and one from a convenience retailer. These are no requirements for Woodbridge town centre from service providers. In total, these operators require between 576 sq m and 2,165 sq m gross of retail floorspace.

Table 6.5: Woodbridge Town Centre Requirements, Focus Property

	Company	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorsxpace (sq m)
1	Barnado's	Charity Shop	Comparison	A1	46	140
2	Size Up	Clothing	Comparison	A1	116	186
3	Cobblers	Shoe Shop	Comparison	A1	42	74
4	Argos	Variety	Comparison	A1	93	1,486
5	Big Food Group	Supermarket	Convenience	A1	279	279
Floorspace Requirements =					576	2,165

Source: Focus Property Database, April 2003

6.21 The requirements from comparison goods retailers include one charity shop, one clothes shop, one shoe shop and one national multiple variety retailer. The variety store has the largest requirement for the town centre. Only one requirement had been identified from a convenience retailer, 'Big Food Group'. This is a small requirement of only 279 sq m gross. We consider this level of demand to be relatively limited, although any element of interest expressed by retailers suggests a healthy town centre. There are likely to be more requirements from smaller independent businesses in a town of this type and size, which are not identified within this assessment.

6.22 The CB Hillier Parker targeted survey of retailers identified 10 requirements for Woodbridge, equating to a floorspace of between 3,017 sq m gross to 8,294 sq m gross (Table 6.6). The survey identified six comparison goods retailers, two convenience goods retailers and one service provider. The comparison goods retailers comprised two clothing stores, a variety/stationary store, a video store, an opticians and a national multiple variety retailer.

Table 6.6: Woodbridge Town Centre Requirements, CB Hillier Parker Survey

	Speciality	Retail Category	Use Class	Minimum Sales Floorspace (sq m)	Maximum Sales Floorspace (sq m)
2	Clothing	Comparison	A1	158	232
3	Variety/Stationery	Comparison	A1	250	297
4	Video	Comparison	A1	232	372
7	Variety	Comparison	A1	790	929
8	Clothing	Comparison	A1	465	929
9	Opticians	Comparison	A1	111	111
5	Foodstore	Convenience	A1	483	483
10	Supermarket	Convenience	A1	232	4,645
1	Restaurant	Service	A3	296	296
Total Floorspace Requirements =				3,017	8,294

Source: CB Hillier Parker Survey, April 2003

6.23 The convenience requirements have been registered by two of the main national multiple food retailers, one for a town centre format store of 483 sq m net, and one for a larger store of between 232 sq m gross to 4,645 sq m gross. These requirements highlight the opportunities to improve the qualitative food provision in Woodbridge. It is evident from the Retailer Need Assessment for Woodbridge that the town centre is not currently attracting interest from high to mid range quality durable goods retailers.

SHOPPING RENTS

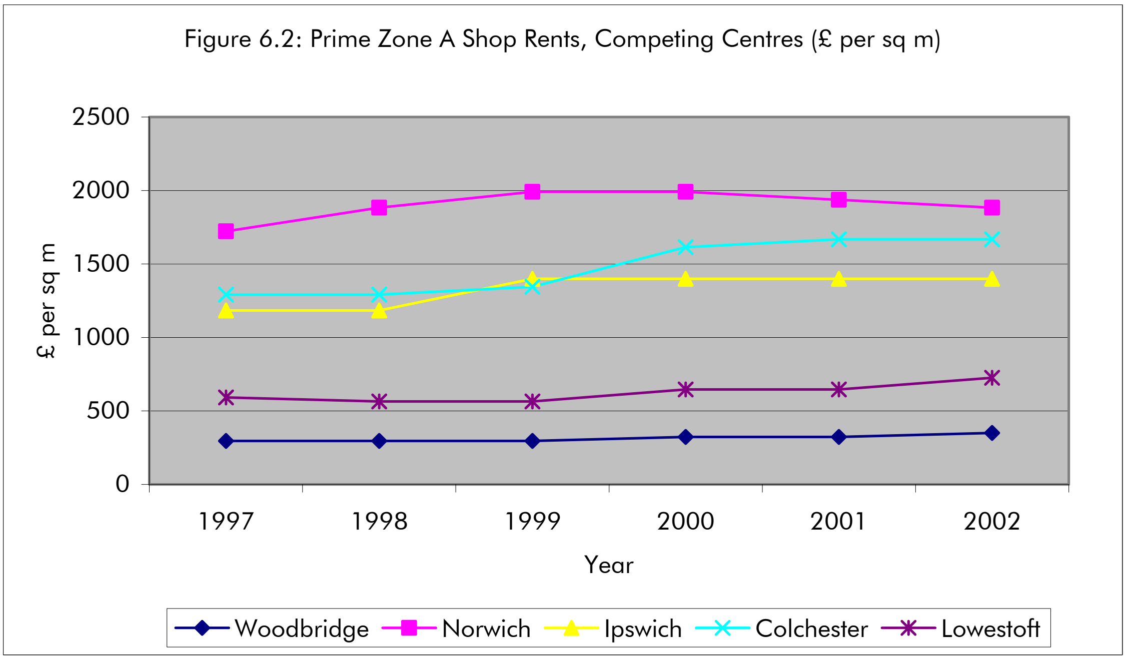
6.24 The level of rent which retailers are prepared to pay for retail space within a centre is an indication of the perceived strength of that centre (although other factors such as the availability of floorspace have an impact on rental value). Whilst rental values can also provide a measure of the primacy of streets and locations in a town centre, we have drawn on the CB Hillier Parker Investment Research database, which focuses on Prime Zone A rental values. As such, we cannot compare rental values in different parts of Woodbridge, but comparisons are drawn with regional and national averages.

6.25 Prime Zone A shop rents in Woodbridge were recorded at £350 per sq m in May 2002 compared to £1,883 per sq m in Norwich, £1,399 per sq m in Ipswich, £1,668 per sq m in Colchester and £726 in Lowestoft. Rental levels in Woodbridge are therefore significantly below those in all the competing centres, reflecting the higher order role of the other centres relative to Woodbridge. Prime Zone A shop rents of Woodbridge have, however, grown from £296 per sq m in May 1997 to £350 per sq m in May 2002 suggesting a strong a healthy town centre over this 6 year period (Table 6.7 and Figure 6.2).

Table 6.7: Prime Zone A Shop Rents, Competing Centres (£ per sq m)

	May 97	May 98	May 99	May 00	May 01	May 02
Woodbridge	296	296	296	323	323	350
Norwich	1,722	1,883	1,991	1,991	1,937	1,883
Ipswich	1,184	1,184	1,399	1,399	1,399	1,399
Colchester	1,291	1,291	1,345	1,614	1,668	1,668
Lowestoft	592	565	565	646	646	726

Source: CB Hillier Parker Research



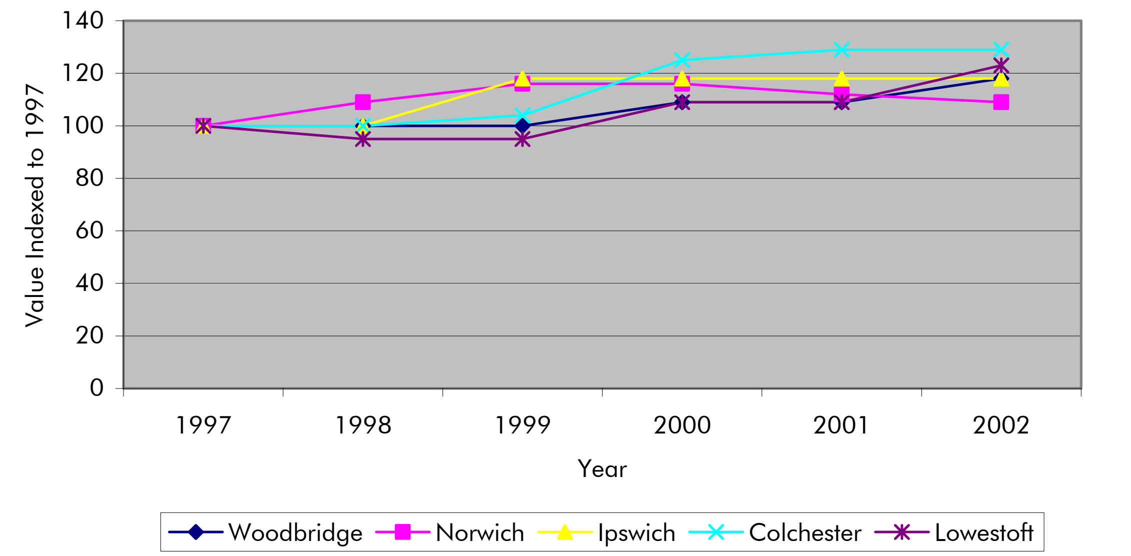
6.26 We have converted the rental values to an index and it is evident that between May 1997 and May 2002, Prime Zone A shop rents in Woodbridge have risen faster than Norwich and at the same rate as Ipswich (Table 6.8 and Figure 6.3). Prime Zone A shop rents in Colchester and Lowestoft have however risen at a faster rate. Between May 1997 and May 2002, the rental indices for Woodbridge had risen 18% compared with 9% in Norwich, 18% in Ipswich and 29% and 23% in Colchester and Lowestoft respectively. This growth in Woodbridge suggests that the town centre has been able to maintain a good level of competition for retail space, enabling rents to rise.

Table 6.8: Prime Zone A Shop Rents (Indexed)

	May 97	May 98	May 99	May 00	May 01	May 02
Woodbridge	100	100	100	109	109	118
Norwich	100	109	116	116	112	109
Ipswich	100	100	118	118	118	118
Colchester	100	100	104	125	129	129
Lowestoft	100	95	95	109	109	123
All Shops Average	100	109	118	127	131	133
Eastern	100	103	110	124	127	130

Source: CB Hillier Parker Research

Figure 6.3: Prime Zone A Shop Rents, Competing Centres (Indexed)



6.27 We have also compared Prime Zone A shop rents in Woodbridge with CB Hillier Parker national and regional averages (Table 6.8 and Figure 6.4). Since May 1997, Prime Zone A rental levels in Woodbridge have risen at a slower rate than regional and national averages which have both grown fairly consistently over the last 5 years.

Figure 6.4: Prime Zone A Shop Rents, National and Regional Comparisons (Indexed)

COMMERCIAL YIELDS

6.28 The commercial yield on non-domestic property is 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 income (i.e. rents are reviewed according to market conditions, and the terms of the property's lease), the greater the prospect of 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.

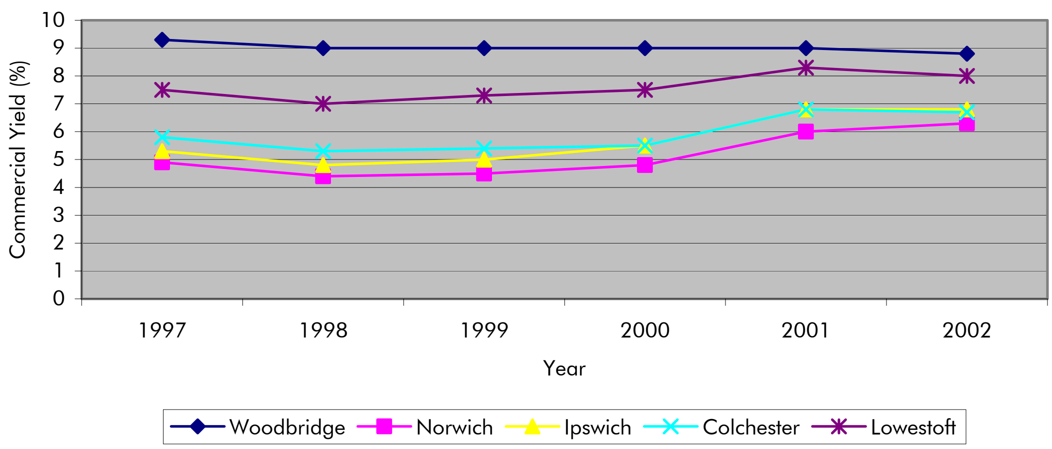
6.29 Table 6.9 compares yields in Woodbridge with the main competing centres in the wider catchment. Woodbridge currently has the highest (or poorest) yield of all four centres at 8.8% in May 2002 and Norwich has the lowest at 6.3%. Woodbridge also has a higher yield than Felixstowe (8.3%).

Table 6.9: Comparison of Prime Retail Yields (%)

	May 97	May 98	May 99	May 00	May 01	May 02	Change
Woodbridge	9.3	9.0	9.0	9.0	9.0	8.8	-0.5
Norwich	4.9	4.4	4.5	4.8	6.0	6.3	+1.4
Ipswich	5.3	4.8	5.0	5.5	6.8	6.8	+1.5
Colchester	5.8	5.3	5.4	5.5	6.8	6.7	+0.9
Lowestoft	7.5	7.0	7.3	7.5	8.3	8.0	+0.5
All Shops	6.1	5.7	5.8	6.0	7.0	7.0	+0.9
Eastern	6.3	5.8	6.0	6.3	7.4	7.3	+1.0

Source: CB Hillier Parker Research

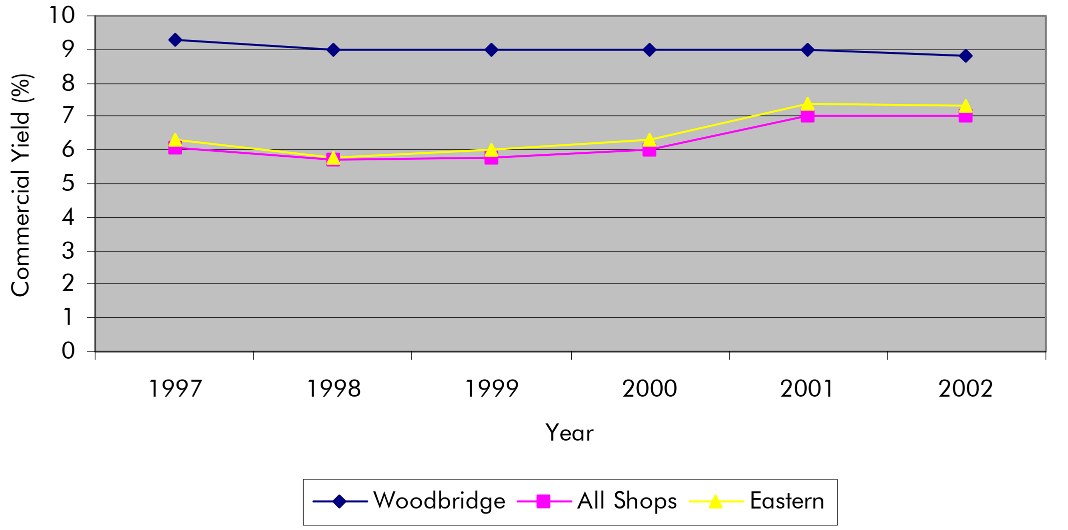
Figure 6.5: Commercial Yields, Competing Town Centres (%)



6.30 Prime retail yields in Woodbridge were at their highest in May 1997 (9.3%) and since fell to 9% between May 1998 and May 2001. This level fell again to 8.8% in May 2002. These figures compare favourably with competing centres whose prime retail yields have all increased over the same 6 year period. Expectations of the general economic prospects for Woodbridge town centre have therefore remained consistent highlighting that there are no particular causes for concern in the centre.

6.31 Table 6.9 and Figure 6.6 also compares prime retail yields in Woodbridge with national and regional averages. In May 2002, prime retail yields in Woodbridge at 8.8% are above the national average of 7% and the regional average of 7.3%. These figures reflect the different function that Woodbridge performs, rather than any underlying weakness. Given the stability of yields in Woodbridge over recent years and other performance indicators, we do not consider there are particular causes for concern in the centre.

Figure 6.6: Commercial Yields, National and Regional Comparisons (%)



Vacant Retail Property

6.32 The proportion of vacant street level property is one of the relevant indicators which can be used when assessing the vitality and viability of a town centre. It should be used with caution, as vacancy can arise even in the strongest town centres, particularly where properties are under alteration. Table 6.10 indicates that according to the Experian Goad Survey (April 2001) there were 11 vacant units in Woodbridge, equating to a floorspace of approximately 1,210 sq m. The proportion of vacant outlets equates to a vacancy rate of 6.63% of total units in the town centre, which is well below the national average of 10.70%. This particular vitality indicator suggests Woodbridge is a healthy centre experiencing little difficulty in maintaining retailers.

Table 6.10: Vacant Units, Woodbridge, April 2001 – by Unit and Floorspace

Vacant Units	Percentage of Total Units	National Average (%)	Sq m	% of Total Floorspace	National Average (%)
11	6.63	10.70	1,210	4.22	8.24

Source: Experian Goad Town Centre Report, Woodbridge, April 2001

6.33 CB Hillier Parker's On-Site Survey, April 2003, updated the Experian Goad data. The survey highlighted that the number of vacant units has fallen from 11 in 2001 to 10 in April 2003. Of the 11 original vacant units in April 2001, 6 have been reoccupied as illustrated in Table 6.11. Five units have become newly vacant since the Experian Goad survey in April 2001. This level of reoccupation highlights that Woodbridge is currently experiencing few problems in uptake. Retailers that have reoccupied vacant units are generally independent specialist retailers (Table 6.11), including health and beauty, health food, kitchenware, crafts and gifts, antiques and ladies wear.

Table 6.11: Reoccupied Units Since April 2001

	Retail Category/Description	Address	Use
1	Health and beauty	Elmhurst Walk	Service
2	Health food	44 Thoroughfare	Convenience
3	Kitchenware	7 Thoroughfare	Comparison
4	Crafts and gifts	4 Cumberland Street	Comparison
5	Antiques	24 Market Hill	Comparison
6	Ladies wear	28 Market Hill	Comparison

Source: Experian Goad (April 2001) and CB Hillier Parker On-Site Survey (April 2003)

6.34 As we would expect, units in this historic market town with limited floorspace are not attracting major national multiple retailers. At the time of the most recent on-site survey, April 2003, there were no remaining vacant units in the Prime Shopping Area.

6.35 Table 6.12 provides a historical overview of vacancy rates in Woodbridge town centre since 1997. Figures have been derived from surveys undertaken by Suffolk Coastal District Council. It is evident that between 1997 and 2002 the number of vacant units in Woodbridge town centre has fallen considerably from 21 in 1997 to 15 in 2002. These figures reflect the growing attractiveness and strength of Woodbridge town centre as a location for retailers since 1997.

Table 6.12: Vacant Units, Historical Data, Woodbridge Town Centre

Year	No. of Vacant Units
1997	21
1998	19
1999	18
2000	13
2001	14
2002	15

Source: Suffolk Coastal District Council

6.36 Vacant units are scattered throughout the secondary shopping areas in Woodbridge town centre. There appears to be a particularly high concentration of vacant units between 18 and 28 Market Hill. Two previously vacant units have been reoccupied since the Experian Goad survey in April 2001, although the CB Hillier Parker On-Site Survey, April 2003, identified three newly vacant adjacent units at 18, 20a and 20 Market Hill. The high rate of reoccupation of vacant units evident in Woodbridge suggests that this particular concentration of vacant units should not be a cause for concern.

PEDESTRIAN FLOWS

6.37 The numbers and movement of people in different parts of the town is a useful indicator of the relative strength of different areas; it is therefore important in providing guidance on how parts of the town would be affected by different actions and improvements. We have reviewed pedestrian movements in the town centre drawing on pedestrian count data produced by Suffolk Coastal District Council. Table 6.13 illustrates the pedestrian flowcounts in different parts of the town centre over a one day period.

Table 6.13: Pedestrian Flows, Woodbridge Town Centre July 2002

Location	Address	Pedestrian Flow Count
My House	72 Thoroughfare	201
Budgens/Boots	Turban Shopping Centre	1,399
HSBC Bank	37 Thoroughfare	1,535
Mackays	23 Thoroughfare	1,823
Gobbitts Yard	Gobbitts Yard	90

Source: Suffolk Coastal District Council

6.38 It is evident from the pedestrian count data that the highest pedestrian movements in Woodbridge town centre is outside Mackays Clothing (23 Thoroughfare) in the centre of the Prime Shopping Area. This area is where the majority of multiple and mainstream retailers are located. High counts were also taken outside HSBC bank (37 Thoroughfare), again in the Prime Shopping Area, and outside Budgens and Boots in the Turban Shopping Centre. The Turban Shopping Centre acts as a through route from the town centre's main car park to the Thoroughfare and Prime Shopping Area. Budgens and the post office also act as strong anchors in this area of the town centre.

6.39 The lowest counts were taken in more secondary shopping areas at 72 Thoroughfare to the east of the Prime Shopping Area outside 'My House Interior Design' and in 'Gobbitts Yard' the small shopping centre accessed off the Thoroughfare. Despite its central location, these figures illustrate the poor attraction of Gobbitts Yard as a shopping destination in the town centre. Pedestrian flow data is not available for Church Street or Market Hill. Our observations however, suggested the secondary shopping areas were significantly quieter in terms of pedestrian footfall compared to the Prime Shopping Area on the Thoroughfare.

6.40 Our analysis suggests there has not been any significant shift in focus of retail activity in the town centre since our previous study in 1997.

ACCESSIBILITY

6.41 Woodbridge is well connected to the local and primary road network. It is on the A12 which links with Ipswich, Colchester, Chelmsford and central London to the south east. The A12 also provides links northwards towards Saxmundham and beyond to Lowestoft, Great Yarmouth and Norwich.

6.42 Woodbridge also benefits from good public transport services. Bus services link Woodbridge to a number of destinations in the District including Ipswich, Aldeburgh, Leiston, Saxmundham, Framlingham, Diss and Bawdsey. These services terminate in the west at Ipswich train station. Bus departure and arrival points in Woodbridge town centre are limited due to the historic narrow streets which do not have the capacity for buses. The bus routes to and from Woodbridge depart and arrive at points to the rear of the Turban Shopping Centre adjacent to the Hamblin Road car park. This enables a short walk to the key town centre foodstore (Budgens), the Turban Shopping Centre and Prime Shopping Area.

6.43 Woodbridge train station, accessed via Station Road, is located to the south of the town centre boundary a relatively short walking distance from the Prime Shopping Area. The location on the major rail network ensures Woodbridge has excellent access to major destinations, including London and Norwich. More local destinations on the same rail route include Ipswich, Saxmundham and Halesworth.

6.44 Traffic congestion in the town centre is managed with a one-way traffic system running from the east of the Thoroughfare to the west of Market Hill. Vehicles can turn in Market Hill and return via New Street. Traffic movement along the Thoroughfare is limited to pedestrians only except for loading and servicing on Mondays – Saturdays between 10.00am and 4.00pm. Traffic is able to move more freely on Church Street and Market Hill, although traffic congestion does not appear to be a problem on these streets.

6.45 Woodbridge town centre has 314 parking spaces in identified town centre car parks. These are detailed in Table 6.14. Hamblin Road (241 spaces) and Oak Lane (73 spaces) are short-term car parks enabling good access to the main shopping frontages. Hamblin Road is located to the rear of the Turban Shopping Centre and Oak Lane is located to the rear of the Thoroughfare and access via New Street. On-street car parking throughout the town centre is limited and the provision of designated off-street car parks appears to be sufficient.

Table 6.14: Car Parks, Woodbridge Town Centre

Location	No. of Spaces
Hamblin Road	241
Oak Lane	73
TOTAL	314

Source: Suffolk Coastal District Council and Experian Goad Town Centre Report, April 2002

ENVIRONMENTAL QUALITY

6.46 Woodbridge is built on the banks of the River Deben, and although some miles from the open sea, it is a sailing town with quays, boat yards and a restored and working tide mill. The town has a history of shipbuilding, rope-making and sail-making, and the narrow streets are lined with medieval buildings. As such, the quality of the built environment with its own unique historic form and character is protected with Conservation Area designation. Woodbridge is one of the outstanding tourist centres within Suffolk.

6.47 There has been noticeable investment throughout the town centre on general environmental improvements. The streets and pavements on the Thoroughfare are level with consistent materials and the location of street furniture does not create visual and physical 'clutter' in pedestrian areas. The street has an overall appearance of cleanliness and space. Without compromising this environment, opportunities for planting and additional street furniture, particularly seating, could be considered in some areas. Shop frontages are well maintained and appear clean with appropriate fascias and signage.

6.48 Market Hill is an attractive, well maintained square. Paving in the central pedestrianised area is in good condition with attractive, consistent brickwork. Investment in planting and cleanliness is evident and this 'car free' Zone works effectively. Shop frontages and residential buildings again appear well maintained and clean with a range of appropriate colours adding to the visual interest of the area. Ongoing schemes and programmes should ensure the co-ordinated upkeep and maintenance of shop frontages and on-street investment and cleanliness.

SUMMARY

6.49 In summary, Woodbridge is an attractive, vital and viable market town, and an important tourist centre.

6.50 Whilst Woodbridge has a strong representation of comparison goods retailers the town centre has a relatively limited provision of 'mainstream comparison retailers' and is instead dominated by a good range of independent and more specialist retailers targeted towards visitors and tourists. The local shopping population is likely to choose to travel to Ipswich for their main comparison goods shopping. The choice and range of convenience goods is limited and faces strong competition from the Ipswich Eastern Fringe, a short drive away. A large proportion of the local population are likely to travel to the Ipswich Eastern Fringe for their main food shopping. This is investigated further in Section 8.

6.51 Prime Zone A rental levels and Prime Retail Yields in Woodbridge are both weaker than competing centres in the wider area, although both indicators have improved since 1997. The proportion of vacant units is below the national average, following a fall in number since 1997. For its size and status, we consider Woodbridge is performing well at present.

6.52 Pedestrian flows in Woodbridge town centre are concentrated on the Thoroughfare within the Prime Shopping Area. Our analysis suggests there has not been any significant shift in focus of retail activity in the town centre since our previous study in 1997. The lowest pedestrian counts were recorded in Gobbitts Yard.

6.53 Accessibility to Woodbridge is good. It is located on the primary road network, and is served by bus and rail. The quality of the built environment with its unique historic form and character is protected with Conservation Area designation. There is noticeable investment throughout the town centre on general environmental improvements including the upkeep of buildings and cleanliness of streets.

7. ALDEBURGH, SAXMUNDHAM, LEISTON, FRAMLINGHAM, IPSWICH EASTERN FRINGE

7.1 In this section, we provide a qualitative assessment of Aldeburgh, Saxmundham, Leiston and Framlingham, 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 do not survey these smaller centres and as such the health checks largely draw on data provided by Suffolk Coastal District Council and CB Hillier Parker On-Site Surveys carried out during April 2003. For each centre we consider the following:

i) Location, physical characteristics and layout of each centre;

ii) The retail composition of the centre;

iii) The range of uses, including vacancy rates;

iv) The key retailers;

v) The state of the town centre environment, including any key features;

vi) The centre's accessibility; and

vii) The level and quality of car parking

7.2 The location of these town centres relative to Felixstowe, Woodbridge and the wider catchment is illustrated on Plan 1. Table 7.1 provides an overview of the town centres highlighting their designation in the current retail hierarchy, the number of retail units and total retail floorspace. A detailed breakdown of retail composition in each centre is attached in Appendix 1. 'Floorspace' in Table 7.1 refers to the amount of floorspace occupied by convenience, comparison, service businesses, miscellaneous uses and vacant units.

Table 7.1: Suffolk Coastal District, Overview of Town Centres

Centre	Retail Hierarchy	Number of Units	Floorspace (sq m gross) (a)
Aldeburgh	Town Centre	87	11,036
Saxmundham	Town Centre	93	16,365
Leiston	Town Centre	99	13,765
Framlingham	Town Centre	88	10,511

Source: 'a' Suffolk Coastal District Council Land Use Surveys, 2002

ALDEBURGH

7.3 Aldeburgh is located on the east coast to the north of Woodbridge and Felixstowe and south of Framlingham, Saxmundham and Leiston. The closest centre 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 (Plan 1). Aldeburgh is a small unspoilt coastal town located entirely within the heritage coast and area of outstanding natural beauty. The town centre boundary also lies entirely within a designated conservation area. Aldeburgh is an important tourist centre within the district.

7.4 The main shopping provision in Aldeburgh is located on the High Street. Town centre objectives, outlined in the adopted Local Plan, include promoting the town centre as a tourist destination, enhancing the environment, reducing traffic congestion, facilitating an appropriately located modern supermarket, and preventing any loss of retailing whilst recognising the importance of service businesses.

7.5 For the purposes of this Retail Study and the retail capacity modelling set out in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Aldeburgh is attached in Appendix 1. This identifies a total ground floor gross floorspace of 11,036 sq m comprising 87 units, excluding residential uses (Table 7.2).

Table 7.2: Retail Composition: Aldeburgh, March 2002

Retail Category	Outlet Number	Percentage Of Total (%)	Floorspace Sq M Gross	Percentage Of Total
Comparison	28	32	2,424	22
Convenience	12	14	1,028	9
Service	26	30	2,452	22
Vacant	7	8	430	4
Miscellaneous	14	16	4,702	43
TOTAL	87		11,036	100

Source: Suffolk Coastal District Council, March 2002

7.6 Table 7.3 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace figure of 6,171 sq m accounted for by A1, A2 and A3 Uses. A3 shop uses account for a relatively high proportion (26%) of this floorspace reflecting its role as an important tourist destination. A1, A2 and A3 Uses equate to 56% of total floorspace in Aldeburgh town centre. This reflects the strong representation of non-retail uses, including hotels, offices and the cinema. Residential uses are not included in these figures.

Table 7.3: Aldeburgh Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1 (46 Units)	3,876	63
A2 (8 Units)	690	11
A3 (15 Units)	1,605	26
TOTAL	6,171	100

Source: Suffolk Coastal District Council land use survey, 2002

7.7 Convenience goods retailers occupy 14% of units in Aldeburgh. This provision is dominated by a number of specialist retailers, for example, three off licences, two newsagents, a bakers, a butchers, and a fishmongers. Operators include a range of local retailers such as Smiths (bakery), Harveys (fishmongers), Millers (newsagents) and Salters (butchers).

7.8 The Co-op is the main convenience store in Aldeburgh and is located on the west side of the High Street adjacent to the post office and Harveys fishmongers. The store opened in 1986 and has a gross retail floorspace of approximately 336 sq m (220 sq m net). The store has only 3 aisles and a limited food range, including a delicatessen and hot food counter. Half an aisle is allocated to non-food toiletries and cleaning products and there are a number of food freezers to the rear of the store. The store is open 7 days a week.

7.9 The 28 comparison goods retailers in Aldeburgh occupy 32% of all units in the centre. There is an adequate range of provision including bookshops, antique dealers, gift shops, clothing, charity shops and chemists, largely targeted towards the tourist market. Very few of the retailers are national multiples and several are very specialist, particularly the strong representation of antique dealers. The local shopping population are likely to travel further a field to higher order centres for their main comparison goods shopping.

7.10 Service businesses occupy 30% of units in Aldeburgh. Occupants largely comprise restaurants, café and fast food retailers including public houses, tea rooms and fast food takeaways. These are supplemented by hairdressers, estate agents and banks. Barclays and HSBC are both represented in Aldeburgh. The high proportion of A3 restaurant uses is likely to be targeted towards the high tourist trade.

7.11 In March 2002, Aldeburgh had seven vacant units, comprising 8% of all units. The vacant units are scattered throughout Aldeburgh indicating no particular problem areas in the retail frontages that may be struggling to attract retailers. The proportion of vacant floorspace in Aldeburgh town centre comprises only 4% of total gross floorspace (Table 7.4).

Table 7.4: Vacant Units, Aldeburgh, 2002 – by Unit and Floorspace

Retail Category	Outlet Number	Percentage Of Total (%)	Floorspace Sq M Gross	Percentage Of Total
Vacant Units	7	10	430	7

Source: Suffolk Coastal District Council

7.12 Table 7.5 provides an historical overview of vacancy rates in Aldeburgh town centre since 1997. Figures have been derived from land use surveys undertaken by Suffolk Coastal District Council. It is evident that between 1997 and 2001 the number of vacant units in Aldeburgh town centre has remained consistently low ranging from between two and three vacant units. Between 2001 and 2002, the figure has, however, jumped considerably to seven vacant units. This is likely to be a temporary rise in such a strong tourist destination.

Table 7.5: Vacant Units, Historical Data, Aldeburgh Town Centre

Year	No. of Vacant Units
1997	2
1998	3
1999	2
2000	2
2001	3
2002	7

Source: Suffolk Coastal District Council

7.13 We have reviewed pedestrian movements in the town centre drawing on pedestrian count data produced by Suffolk Coastal District Council. Table 7.6 outlines the location and outcome of the pedestrian flowcounts. It is evident that the highest pedestrian movements in Aldeburgh town centre are outside the post office and Co-op foodstore (High Street west side). The Co-op foodstore is the main anchor retailer in the town centre and the pedestrian flowcounts are consistent with this retail function. The second highest count was taken outside Barclays bank, again on High Street west-side. Low counts were taken in outside the cinema and Jubilee Hall towards the outer area of the town centre.

Table 7.6: Pedestrian Flows, Aldeburgh Town Centre, March 2002

Location	Address	Pedestrian Flow Count
Cinema	High Street – West Side	35
Jubilee Hall	Crabbe Street – East	10
Post Office/Co-Op	117-123 High Street West Side	250
Barclays Bank	177 High Street – West Side	164

Source: Suffolk Coastal District Council

7.14 Aldeburgh is located on the coast approximately 6-7 miles east of the primary road network (A12) and the closest town centre is Leiston, approximately 4 miles to the north accessed via the B1122. Aldeburgh does not therefore act as a traffic through-route and the only vehicular concerns are related to the tourist trade. Aldeburgh is not linked to the rail network but local bus routes connect the town centre to Ipswich Hospital, Ipswich town centre, the Tesco foodstore at Martlesham Heath and local destinations including Woodbridge, Leiston, and Saxmundham.

7.15 There are 300 parking spaces in designated car parks. Free, short stay, on street parking along the length of the main high street supplements this provision. It is apparent that on-street parking facilities are the first choice for shoppers whilst the car parks remained relatively empty. Fort Green was unused on the day of our site visit. These car parks are likely to be necessary during the summer tourist season.

Table 7.7: Car Parks, Aldeburgh Town Centre

Location	No. of Spaces
Thorpe Road	220
Fort Green	80
TOTAL	300

Source: Suffolk Coastal District Council, March 2002

7.16 Aldeburgh is an historic coastal town located away from the main road networks. It is a quiet seaside resort with historic buildings and individuality, and has become an important tourist centre in Suffolk Coastal District. The town is located entirely within the Heritage Coast and Area of Outstanding Natural Beauty.

7.17 Buildings throughout the town centre are maintained to an extremely high standard. They are attractive and clean, and frontages and signage are appropriate for an historic town. The streets and pavements are wide and well maintained with consistent and level paving. Street furniture and signage is consistent and attractive, and there is no evidence of crime, vandalism or litter.

7.18 In summary, we consider Aldeburgh is an unspoilt and attractive centre, and on the whole it appears to be performing well. The relatively high proportion of A3 service uses reflects the tourist function of the town centre. Comparison goods provision is more limited with very few national multiple retailers. The main convenience goods provision comprises Co-Op and other specialist operators, although main food shopping requirements are likely to be supplemented by larger facilities in neighbouring centres. Vacancy rates have been consistently low; although these have risen sharply since 2001, this is likely to be temporary in such a strong tourist destination. The highest pedestrian movements are on the main shop frontages outside Co-Op and the Post Office. The town is located entirely within the Heritage Coast and Area of Outstanding Natural Beauty, and the historic environment is maintained to an extremely high standard.

SAXMUNDHAM

7.19 Saxmundham is located off the A12 to the north of Woodbridge town centre. It lies to the east of Framlingham and to the west of Leiston and Aldeburgh, all within relatively close proximity. The adopted Local Plan designates Saxmundham a conservation area as a result of a 'pleasing consistency of scale, materials and styles, which add to the spaces around the Market Place and the curving alignment of the High Street'. The main shopping provision in Saxmundham is located on the High Street and Market Place and is supplemented with more secondary shopping areas on the south entrance and towards the back of Market Square, and on Church Street and Chantry Road.

7.20 For the purposes of this Retail Study and the retail capacity modelling set out in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Saxmundham is attached in Appendix 1. This identifies a total ground floor gross floorspace of 16,365 sq m (Table 7.8). The high proportion of both unit number and floorspace occupied by miscellaneous uses highlights the strong representation of non-retail uses scattered within the retail frontages. These include hotels, offices, the royal mail sorting office and petrol filling station.

Table 7.8: Retail Composition: Saxmundham, March 2002

Retail Category	Outlet Number	Percentage Of Total (%)	Floorspace Sq M Gross	Percentage Of Total
Comparison	25	27	2,524	15
Convenience	8	9	2,287	14
Service	22	23	2,497	15
Vacant	8	9	1,075	7
Miscellaneous	30	32	7,982	49
TOTAL	93	100	16,365	100

Source: Suffolk Coastal District Council, March 2002

7.21 Table 7.9 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace figure of 8,946 sq m accounted for by A1, A2 and A3 Uses. A2 shop uses account for 32% of this floorspace. We consider this to be a relatively high proportion when compared to the other three smaller town centres. A1, A2 and A3 Uses equate to 55% of total floorspace in Saxmundham town centre.

Table 7.9: Saxmundham Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1 (40 Units)	5,238	58
A2 (17 Units)	2,856	32
A3 (7 Units)	852	10
TOTAL (64 Units)	8,946	100

Source: Suffolk Coastal District Council land use survey, 2002

7.22 It is evident from Table 7.8 that the majority of retail units (27%) are occupied by comparison goods retailers. These are largely independent specialist retailers including a second-hand book shop, a wool shop, a fabric shop, an arts and crafts store, a pet shop and a jewellery shop. The weekly market in Market Place sells a range of non-food goods including cards and stationery, cleaning products and clothing. The more limited depth and range of comparison goods products on offer highlight the town centre's more local shopping function when compared to centres such as Ipswich.

7.23 23% of units in Saxmundham are occupied by service businesses (22 units). There is a relatively even representation of A1, A2 and A3 service uses including hairdressers, building societies, restaurants, cafes, take aways and banks. Convenience goods retailers in Saxmundham occupy 9% of total units, comprising approximately 2,287 sq m gross of retail floorspace. The town centre has a more limited convenience offer in terms of specialist retailers and includes one bakers, one butchers, one CTN unit and one off licence.

7.24 Somerfield, Haywards Mews, is the principal food retailer in Saxmundham. The store opened in 1987 and has a gross floorspace of approximately 1,321 sq m (743 sq m net). There is 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. A supplementary Co-Op store located on the High Street (No.7) has a gross floorspace of approximately 492 sq m (225 sq m net). The weekly market in Market Place has a number of stalls including a fish van and fruit and vegetable products.

7.25 Saxmundham has eight vacant units, equating to 9% of all outlets and 7% of total retail floorspace. Five vacant units are located on the High Street and three are located on Back Market, Chantry Road and Church Street (south). There are no vacant units in Market Place. The vacant units are relatively spread out through the town centre and do not indicate any particular problem areas struggling to maintain or attract retailers.

7.26 Table 7.10 provides an historical overview of vacancy rates in Saxmundham town centre since 1997. Figures have been derived from surveys undertaken by Suffolk Coastal District Council. It is evident that between 1997 and 2001, Saxmundham has had a relatively high number of vacant units, higher than both Aldeburgh and Framlingham. Between 2001 and 2002, this figure has, however, fallen to only eight vacant units suggesting a growth in attractiveness and strength of Saxmundham town centre as a location for retailers.

Table 7.10: Vacant Units, Historical Data, Saxmundham Town Centre

Year	No. of Vacant Units
1997	14
1998	12
1999	14
2000	13
2001	12
2002	8

Source: Suffolk Coastal District Council

7.27 It is evident from pedestrian flow data provided by Suffolk Costal District Council (Table 7.11) that the highest pedestrian movements were accounted for outside 26 High Street. This unit is in the main retail frontages and is now vacant, although the previous tenant, Martin Brothers, occupied the unit for a number of years. The second highest count was taken outside 6 Market Place, Humphreys Newsagents and the third highest count was recorded outside the White Heart public house, 18 High Street. These figures suggest a good spread of pedestrian flow movements throughout the northern areas of the town centre. The weaker pull of the southern area of the town centre is reflected by a particularly low count outside Smith and Wesby on south entrance west.

Table 7.11: Pedestrian Flows, Saxmundham Town Centre, March 2002

Location	Address	Pedestrian Flow Count
Humphreys Newsagents	6 Market Place	206
Vacant (previous tenant Martin Bros)	26 High Street	239
Entrance to White Hart car park	18 High Street	186
Smith and Wesby/Thresher	South Entrance West	30

Source: Suffolk Coastal District Council

7.28 Good pedestrian movements on Market Place and around the High Street are likely to be encouraged by the location of the two main town centre car parks at Market Place and Church Street adjacent to Somerfield (Table 7.12). Market Place car park is accessed via Market Place leading from the main High Street. This car park provides good access to Saxmundham train station, bus station and the main retail frontages. The Church Street car park is located to the south east of the town centre adjacent to Somerfield, the principal town centre foodstore. There is a pedestrian through route leading from Church Street car park to the main High Street. On-street parking throughout the town centre is restricted.

Table 7.12: Car Parks, Saxmundham Town Centre

Location	No. of Spaces
Market Place	82
Church Street	147
TOTAL	229

Source: Suffolk Coastal District Council, March 2002

7.29 Saxmundham is easily accessible by road, rail and bus routes. The town centre is located just off the A12 primary road network which links with Woodbridge to the south, and Lowestoft to the north. The road network provides ease of access to the surrounding residential population. Saxmundham train station is located on Station Approach on the East Suffolk line between Ipswich and Lowestoft. The station is a short walk along Station Approach from Market Place and the main retail frontages. The rail service also links Saxmundham directly with Norwich and to more local destinations including Halesworth, Woodbridge and Melton.

7.30 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, Ipswich Hospital and Ipswich town centre.

7.31 Saxmundham market town has an attractive built environment serving a wide surrounding rural catchment area. The A12 now diverts traffic outside the town centre ensuring calmer traffic movement within the town centre, particularly on the High Street. The town centre is designated a Conservation Area, largely based on its consistency of scale, materials and styles, which add to the spaces around the Market Place and the alignment of the High Street.

7.32 Buildings are maintained to a relatively high standard although there are some signs of dilapidation and need for investment. On the whole frontages are in keeping with the scale and appearance of the town centre, and maintain many of their original features. The High Street functions as a two way traffic system, although pedestrian crossing points assist pedestrian movements and linkages between retail units.

7.33 Paving materials and street furniture including lighting are generally inconsistent, although there are signs of investment on road levelling and pedestrian safety. Market Place is a particularly attractive area located behind the High Street. The historic buildings and weekly market adds to its vitality. Opportunities for pedestrianisation and landscaping would enhance the Market Place further and assist in traffic movements at the entrance to the Market Place car park.

7.34 In summary, retail frontages in Saxmundham town centre are dispersed with a relatively high proportion of non-shop uses. The proportion of A2 Uses is also high for a centre of this size, reflecting a relatively weak A1 shopping provision. Floorspace and composition figures suggests that Saxmundham could be a vulnerable centre competing with non-retail uses. The number of vacant units has declined since 1997 suggesting a positive improvement in the health of the town centre. Saxmundham is easily accessible by road, bus and train, and the attractive built environment is protected with Conservation Area designation. There are, however, some signs of dilapidation and the need for investment. However, funding is now available to retailers for improvements to their premises through the Heritage Economic Regeneration Scheme (HERS) and recent works around the Market Place have been carried out to enhance the area and improve pedestrian safety.

LEISTON

7.35 Leiston is a compact town centre largely under the influence of the Sizewell Nuclear Power Stations and located on the minor road network. The function of the town centre continues to be heavily influenced by the close proximity of the power stations, which is responsible for a large proportion of employment in the area. In contrast, the other three town centres considered in this section are largely influenced by the tourist trade.

7.36 The main shopping provision in Leiston is located on High Street and Sizewell Road with supplementary shopping areas on Main Street North, Main Road South, and Valley Road. Retail frontages on Main Street and a small area to the north of High Street are within a designated conservation area. The defined town centre boundary in the adopted Local Plan incorporates a wide range of uses including retail dispersed with a mixture of residential and commercial uses.

7.37 For the purposes of this Retail Study and the retail capacity modelling outlined in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Leiston is attached in Appendix 1. This identifies a total ground floor gross floorspace of 13,765 sq m (Table 7.13). The wide range of commercial uses referred to above, is reflected in the particularly high proportion of miscellaneous uses.

Table 7.13: Retail Composition: Leiston, March 2002

Retail Category	Outlet Number	Percentage Of Total (%)	Floorspace Sq M Gross	Percentage Of Total
Comparison	33	33	4,230	31
Convenience	8	8	2,047	15
Service	23	23	1,977	14
Vacant	11	11	626	5
Miscellaneous	24	24	4,885	35
TOTAL	99	100	13,765	100

Source: Suffolk Coastal District Council, March 2002

7.38 Table 7.14 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace figure of 9,385 sq m accounted for by A1, A2 and A3 Uses. 68% of floorspace is occupied by A1 uses.

Table 7.14: Leiston Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1 (45 Units)	6,457	68
A2 (15 Units)	1,457	16
A3 (14 Units)	1,471	16
TOTAL (74 Units)	9,385	100

Source: Suffolk Coastal District Council land use survey, 2002

7.39 Convenience goods retailers occupy 8% of all units in Leiston. The provision includes two general convenience goods retailers (Mace and the larger Solar Co-op foodstore) and six specialist retailers: two fruit and vegetable shops, one baker, one newsagent and two butchers.

7.40 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 7 aisles with a good food range including a hot food counter and delicatessen. Additional facilities include a large freezer section, tobacconist, customer toilets, photocopier, coffee shop and ATM. There are some non-food products including electrical goods, bedding and garden chairs.

7.41 The 33 comparison goods retailers in Leiston occupy 33% of all the units in the centre and 31% of total retail floorspace. There is an adequate range of provision including opticians, a pet shop, ladies clothing, electrical goods and a tool centre. The Co-Op Home Store, adjacent to the foodstore, provides a wide range of non-food products on two levels. The ground floor is allocated for household electrical goods including domestic appliances, washing machines, and electrical goods. Clothing, bedding and curtains are located on the upper floor. Overall comparison goods provision serves everyday retailer requirements, although the range of products is more limited than other centres of this size. Leiston has a more limited range of specialist retailers found in the other three centres reflecting their different function as tourist destinations.

7.42 Service businesses occupy 23% of all units in Leiston. A large number of these occupiers are A3 uses including public houses and a large number of fast food takeaway restaurants. Barclays is the only bank represented in the town centre and there are two estate agents and one building society.

7.43 Leiston has eleven vacant units, comprising 11% of all units. Nine vacant units are located on the High Street, two are on Sizewell Road and one is on Valley Road. It is evident from Table 7.15 that between 1997 and 2002, the number of vacant units in Leiston town centre has fluctuated between six and twelve, reflecting a consistently high number of vacant units. These figures suggest that Leiston has continued to experience more difficulties than the other centres in this section to attract new retailers to the town centre.

Table 7.15: Vacant Units, Historical Data, Leiston Town Centre

Year	No. of Vacant Units
1997	11
1998	6
1999	10
2000	12
2001	10
2002	11

Source: Suffolk Coastal District Council

7.44 In terms of pedestrian movements, Table 7.16 highlights that the highest pedestrian counts were recorded outside the Solar Co-op foodstore on Sizewell Road. The store has a large influence on this high pedestrian count acting as a dominant anchor retailer within the retail frontages. Lower counts were taken outside Barclays bank on Main Street North, the Black Horse public house and the cinema both located on High Street. The number and movements of people in different parts of the town is a useful indicator of the relative strength of different areas.

Table 7.16: Pedestrian Flows, Leiston Town Centre, March 2002

Location	Address	Pedestrian Flow Count
Barclays	Main Street (north)	145
Cyds – Black Horse Pub	High Street	157
Cinema	High Street	104
Solar Co-Op	Sizewell Road	329

Source: Suffolk Coastal District Council

7.45 Leiston has relatively good access by road and bus. 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, Ipswich Hospital and Ipswich town centre. There are two local authority car parks in Leiston with a total of 120 parking spaces in designated car parks, and there is a further store car park to the rear of Co-Op Solar (Table 7.17).

Table 7.17: Car Parks, Leiston Town Centre

Location	No. of Spaces
Sizewell Road	47
High Street	73
TOTAL	120

Source: Suffolk Coastal District Council, March 2002

7.46 Leiston is less diverse in character and history than the other three centres assessed in this section. The main retail frontages on High Street and Sizewell Road do not fall within the Conservation Area which is located to the outer north west boundary of the town centre. Buildings and shop frontages are inconsistent in style and there are clear 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.

7.47 Pedestrian pavements comprise inconsistent materials, street furniture and signage is limited, and boarded up vacant units suffer from vandalism and graffiti. There is evidence of investment in road usage through the implementation of traffic calming measures and re-surfacing. Pavements are narrow and investment in consistent materials and levelling would improve the pedestrian environment.

7.48 In summary, the health check indicators reflect a potentially vulnerable centre. Unlike the other three smaller centres, Leiston does not benefit from a strong tourist trade, and the consolidation of retail frontages is interrupted by a large range of residential and commercial uses. The proportion of A1 shop Uses is relatively strong, but Leiston has experienced a consistently high number of vacant units since 1997. Leiston has good access by bus and road, but there is no train station. The environment is less diverse in character and history than the other three town centres. There are clear signs of dilapidation and lack of investment. However, enhancement work is now starting on the improvement of the town centre by the District and County Councils. The first stage is around Old Post Office Square, expected to be completed this summer.

FRAMLINGHAM

7.49 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.

7.50 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 Welle Close Square. Town centre objectives outlined in the adopted Local Plan include environmental improvements to Market Hill, resistance of any further large foodstore development in the town centre and to maintain a policy which defends any loss of retailing but which recognises the importance of services in underpinning the town centre's vitality and viability.

7.51 For the purposes of this Retail Study and the retail capacity modelling outlined in Section 8, we have used retail floorspace figures provided by Suffolk Coastal District Council. The land use survey was undertaken in 2002 and a detailed breakdown of the survey for Framlingham is attached in Appendix 1. This identifies a total ground floor gross floorspace of 10,511 sq m (Table 7.18). These figures do not include residential uses.

Table 7.18: Retail Composition: Framlingham, March 2002

Retail Category	Outlet Number	Percentage Of Total (%)	Floorspace Sq M Gross	Percentage Of Total
Comparison	31	35	2,782	26
Convenience	6	7	2,138	20
Service	20	22	2,197	21
Vacant	5	6	352	4
Miscellaneous	26	30	3,042	29
TOTAL	88	100	10,511	100

Source: Suffolk Coastal District Council, March 2002

7.52 Table 7.19 breaks down the land use survey undertaken by Suffolk Coastal District Council by Use Class. This identifies a total gross floorspace of 8,052 sq m accounted for by A1, A2 and A3 Uses. A1 Uses account for 61% of this floorspace, and A2 Uses account for 25%. A1, A2 and A3 Uses equate to 77% of total floorspace in Framlingham town centre.

Table 7.19: Framlingham Retail Composition by Use Class and Floorspace

Use Class	Floorspace (sq m gross)	% of Total
A1 (39 Units)	4,894	61
A2 (21 Units)	1,986	25
A3 (9 Units)	1,172	14
TOTAL (69 Units)	8,052	100

Source: Suffolk Coastal District Council land use survey, 2002

7.53 Convenience goods retailers occupy only 7% of all units in Framlingham. The six convenience goods retail units provide a limited range of specialist retailers. There is one delicatessen, one bakery and one newsagent. A general store and the Co-Op Solar supermarket compensate for this limited number of convenience goods retailers.

7.54 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, and a small range of non-food products including electrical and domestic appliances. Additional facilities include a tobacconist, customer toilets and baby changing room.

7.55 The 31 comparison goods retailers in Framlingham town centre occupy 35% of all the units in the centre and 26% of total floorspace. Retailers provide for 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. Goods include household furnishings, chemists, opticians, clothing, shoes, a florist and a pet shop. Operators are mainly local and independent retailers such as Framlingham stationers and printers; Second Hand Bookshop; and Bill Bulstrode carpets and blinds.

7.56 Service retailers occupy 22% of all units in Framlingham. The 20 units are occupied by a range of A1, A2 and A3 uses including pubs, restaurants, hairdressers, dry cleaners, travel agents and estate agents. Two of the main high street banks are represented and there is a Halifax Building Society.

7.57 Framlingham has only 5 vacant units, comprising 6% of all units, and 4% of total floorspace. This particular vitality indicator suggests a healthy town centre. One vacant unit is located on College Road South, two on Bridge Street and two on Market Square. It is evident from Table 7.20 that between 1997 and 2002, the number of vacant units in Framlingham town centre has remained consistently low, ranging from 2 to 6 units. These figures suggest that Framlingham experiences few problems in maintaining and attracting new retailers.

Table 7.20: Vacant Units, Historical Data, Framlingham Town Centre

Year	No. of Vacant Units
1997	2
1998	4
1999	5
2000	6
2001	2
2002	5

Source: Suffolk Coastal District Council

7.58 We have reviewed pedestrian movements in the town centre drawing on pedestrian count data produced by Suffolk Coastal District Council. Table 7.21 outlines the location and of pedestrian flow count. It is evident that the highest pedestrian movements in Framlingham are on Market Square outside Panorama gift shop. This is where the main concentration of retailing in Framlingham town centre is located, and therefore acts as a strong pull for shoppers. A high pedestrian count was also recorded outside the entrance/exit to Co-Op Solar, the main anchor retailer in the town centre. Lower counts were taken in more secondary locations, including Bridge Street South, Church Street East and Well Close Square East. The numbers and movements of people in different parts of the town is a useful indicator of the relative strength of different areas.

Table 7.21: Pedestrian Flows, Framlingham Town Centre, March 2002

Location	Address	Pedestrian Flow Count
Volunteer Centre	Bridge Street South	37
Access to Solar	Well Close Square East	78
Panorama	20 Market Square	139
Crown and Anchor Pub	Church Street East	37
Entrance to Church	Well Close Square East	28

Source: Suffolk Coastal District Council

7.59 Framlingham can be accessed by road and bus. 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. One bus route provides direct links with a limited number of local destinations including Diss, Wickham Market, Melton and Woodbridge. The bus route also links with the Tesco foodstore at Martlesham Heath, Ipswich Hospital and Ipswich town centre. The closest train station is in Saxmundham approximately 6-7 miles away.

7.60 The town centre has two main car parks. 'The Elms' is located to the north west of the town centre. The adopted Local Plan 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.

7.61 Framlingham lies on the upper reaches of the River Ore. The central area, together with the castle, school and extensive water meadows around the Mere, has been designated as a Conservation Area because of their importance and relationship to each other. Shop units reflect a rich history with many dating from the 17^{th}, 18^{th} and 19^{th} Century. The character and attractiveness of the town centre enables Framlingham to remain an important tourist centre in Suffolk Coastal District.

7.62 Buildings and frontages are relatively well maintained and retain 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 although there is potential to improve the road surface and consistency in use of material. 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 not a problem and the central area is a quiet and safe pedestrian environment.

7.63 In summary we consider Framlingham to be a vital and viable town centre. The Co-Op Solar provides a 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 local shopping requirements, and service businesses comprise a range of A1, A2 and A3 Uses. We consider shopping provision in Framlingham to be relatively balanced. Vacancy rates have been consistently low since 1997, and the highest pedestrian movements are located on Market Place, where the main concentration of retailing is present. The town centre is relatively quiet with an attractive, historic and characteristic environment.

IPSWICH EASTERN FRINGE

7.64 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.

7.65 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 8, 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. The location of existing retail provision outlined below is illustrated on Plan 3.

TESCO, KESGRAVE

7.66 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). Surrounding land uses include large residential areas, the Kesgrave Community Centre, children's playschool/nursery, and the new Kesgrave Scouts building. Adjacent retail units include a veterinary practice, hair & beauty salon, dry cleaners, estate agent and a charity shop. The car park is relatively small but appropriate for the size of the foodstore.

7.67 The foodstore serves the local residential population. It has a good food range including a delicatessen and bakery. There are no non-food goods on offer. There are 7 aisles and 8 customer checkouts. Additional facilities include a coffee shop, customer toilets, pharmacy, tobacconist and an in-store electronic bus service update. The store is open seven days a week.

7.68 A planning application was submitted in July 2002 to extend the store, increasing the net sales area by 541 sq m. The 'Planning and Retail Statement' supporting the application states that 'much of this additional space shall be used to provide wider aisles, more circulation space and increased check outs'. They suggest the new sales floorspace will be used for the sale of convenience goods. The planning application remains undetermined.

TESCO, MARTLESHAM HEATH

7.69 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.

7.70 It has a comprehensive food offer including a delicatessen, butcher, fishmonger, cheese counter and bakery. There are 28 aisles with half an aisle allocated for a limited range of non-food products including kitchenwear, mobile phones, and music, videos and DVD's. There is a small amount of children's clothing. Additional facilities include a café/restaurant, customer toilets, pharmacy and tobacconist. Adjacent uses include a 24 hour petrol filling station and store dedicated car park.

7.71 A planning application was submitted in June 2002 to extend the existing store. Subsequent supplementary information indicates an increase in floorspace of 2,399 sq m gross (1,562 sq m net). Of the increase in retail sales area of 1,462 sq m, 1,310 sq m is for comparison goods. This will increase the comparison goods floorspace from 4% to 27% of the total net area. The planning application remains undetermined. An outline consent on land adjacent to the Tesco site for 3,716 sq m (40,000 sq ft) of non-food retail use is the subject of an application for the approval of reserved matters, recently received by the District Council and, as yet, undetermined. The land is owned by Tesco.

SAINSBURY'S AND HOMEBASE, WARREN HEATH

7.72 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.

7.73 Sainsbury's opened in 1985 and has a gross floorspace figure of approximately 7,700 sq m (4,580 sq m net). It has 39 aisles and 30 customer checkouts. The store is very popular and has a comprehensive food offer including a butcher, fishmonger, delicatessen, bakery and 'food to go' counter. Additional facilities include a tobacconist, ATM's, magazine/stationery shop, florist, Minit dry cleaners and key cutter, personal banking and wheelchair provision. The health & beauty section and pharmacy is currently being refurbished. 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 that the Tesco at Martlesham Heath. Products include kitchenwear, 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.

7.74 A planning application was submitted in September 2002 to extend the store by 1,664 sq m gross (1,357 sq m net). The Retail Supporting Statement, produced by White Young Green, indicates that 'the requirement to extend the store is generated by the qualitative need to improve the shopping environment, including the range of goods offered'. This application has since been withdrawn.

BEARDMORE RETAIL PARK, MARTLESHAM HEATH

7.75 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 BTexact 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

7.76 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.

7.77 Work is currently underway for a new 9,290 sq m (100,000sq ft) B&Q Warehouse on the Retail Park. The Retail Park comprises an 'L' shaped terrace of 9 units, predominantly occupied by furniture and furnishings retailers. Occupants include Allied Carpets, Carpetright, Harveys, Hughes Electrical, JJB Sports, MFI and PowerHouse. Two units are currently vacant, one of which is being refurbished.

SUMMARY

7.78 Our detailed assessment highlights an attractive network of historic town centres throughout Suffolk Coastal District. Vitality and viability indicators drawn from our on-site surveys reflect varying degrees of 'health' within the smaller town centres. They all have relatively local shopping catchments and the town centres provide for 'everyday' shopping requirements of the local shopping population. The built environment in Leiston is not of the same quality as the other towns, and there are more noticeable signs of dilapidation and vulnerability. However, enhancement work is now starting on the improvement of the town centre by the District and County Councils. The first stage is around Old Post Office Square, expected to be completed this summer.

7.79 Table 7.22 summaries our audit of retail provision in the town centres. The retail provision in Aldeburgh, Framlingham and Saxmundham are all noticeably more directed towards the strong tourist trade, whilst Leiston is evidently more influenced by the close proximity of the Power Station, which is responsible for a large proportion of employment in the area. Each centre has an anchor foodstore such as a Budgens or Co-Op Solo, with supplementary specialist stores including bakers and butchers.

Table 7.22: Summary of Town Centre Provision

	Convenience		Comparison		Service		Vacant		Miscellaneous		Total
	No.	%	No.	%	No.	%	No.	%	No.	%	
Aldeburgh	12	14	28	32	26	30	7	8	14	16	87
Saxmundham	8	9	25	27	22	23	8	9	30	32	93
Leiston	8	8	33	33	23	23	11	11	24	24	99
Framlingham	6	7	31	35	20	22	5	6	26	30	88

Source: Suffolk Coastal District Council

7.80 Comparison goods retailer representation generally consists of smaller, more independent retailers throughout each town centre. The local shopping population has to travel further a field to 'higher order' shopping centres for a greater range and quality of comparison goods. The town centres cater for both the tourist trade, reflected by the high number of antique shops, second-hand bookshops and gift shops, and the local shopping population reflected by a relatively narrow range of 'everyday' products.

7.81 The highest proportion of service units is in Aldeburgh (30%). A large proportion of service retailers in Aldeburgh comprise A3 restaurant uses targeted towards the tourist and weekend population. The proportion of service uses in Saxmundham (23%), Leiston (23%) and Framlingham (22%) is similar. In each town centre the proportion of service uses remains lower than the proportion of comparison goods retailers.

7.82 The highest proportion of vacant units is evident in Leiston (11%), followed by Aldeburgh and Saxmundham (8% and 9% respectively). The lowest proportion of vacant units in evident in Framlingham (6%). Our historical analysis of vacancy rate in the four town centres highlight that Aldeburgh and Framlingham have the best record with consistently low vacancy rates, Saxmundham and Leiston have had consistently higher vacancy rates since 1997. Given its inherent attractions, the recent jump in vacant units in Aldeburgh appears likely to be a temporary phenomenon.

7.83 Saxmundham and Leiston benefit from good locations on the main road network (A12). Framlingham and Aldeburgh are more isolated, located on minor 'B' road networks. Bus routes link the town centres to each other and other local destinations within Suffolk Coastal District. Saxmundham is the only smaller town centre that benefits from its location on the rail network with direct links to Ipswich, Lowestoft, Norwich, Halesworth, Woodbridge and Melton.

7.84 Shoppers benefit from pay and display off-street car parking in each of the town centres. As identified in the Local Plan, further parking facilities in Framlingham would benefit local shoppers. Parking provision appeared to be almost at full capacity on the days of our site visits. Parking provision in Saxmundham, Leiston and Aldeburgh, appeared sufficient to meet local shopping requirements, but this position is likely to change during the tourist season.

7.85 Ipswich, and the concentration of out of centre retailing in the Ipswich Eastern Fringe has a significant influence on trading patterns in Suffolk Coastal District. The Tesco superstore at Kesgrave District Centre is the smallest and least influential foodstore in the Ipswich Eastern Fringe. It has a relatively small car park and meets the needs of the local shopping population. The Tesco superstore at Martlesham Heath and the Sainsbury's at Warren Heath are, however, much larger offering a comprehensive range of food products.

7.86 Both foodstores have a range of non-food products including kitchenware, mobile phones, children's clothing, and electronic and domestic appliances. Non-food provision in the Sainsbury's store at Warren Heath is more extensive with a larger floorspace than the Tesco superstore at Martlesham Heath. This is in addition to the extensive durable goods retail warehouse provision in the Eastern Fringe.

8. QUANTITATIVE ASSESSMENT

8.1 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, Framlingham, Leiston, and Saxmundham 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 2016.

8.2 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 a Household Telephone Interview Survey of existing shopping patterns which enables us to model the existing flows of available expenditure to each town centre. To summarise, we have 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.

8.3 Once we have established this baseline position, we have explored the capacity for further retail floorspace, having regard to the performance of existing facilities and where appropriate, the potential to change the pattern of market shares to support new development. The results are set out in Appendix 2.

8.4 We have considered comparison and convenience shopping patterns, turnover and future capacity. This has included an examination of the extent to which existing stores are meeting resident's needs by reviewing which stores shoppers are currently using for main food shopping and top up food shopping, and the extent to which the existing stores are utilising available expenditure within the catchment area of each centre.

SURVEY AREA AND HOUSEHOLD INTERVIEW SURVEY

8.5 In order to provide detailed factual information on the shopping patterns in the Suffolk Coastal District town centres, we commissioned a new Household Interview Survey covering 1,000 households. CB Hillier Parker designed a survey questionnaire in consultation with Council Officers, and Research and Marketing Ltd undertook Interviewing and data processing. The survey questionnaire and results are included in Appendix 3.

8.6 The survey sought to determine shopping habits of households for both convenience and comparison goods. Where necessary, the survey results have been rebased to remove inappropriate responses, such as 'don't shop for particular goods'. For food and convenience goods, the Household Interview Survey included questions on main food and top-up food and convenience goods shopping. The modelling uses weighted averages of the responses to these questions; weighting the responses to each category according to our estimate of the relative expenditures in each. The survey also included seven questions on specific comparison goods types which coincide with the Unit for Retail Planning Information (URPI) definitions of comparison goods expenditure. Accordingly the modelling uses the weighted averages of the Household Survey responses for each goods type based on the proportion of per capita expenditure on that goods type.

8.7 The survey area for the Suffolk Coastal District town centres is illustrated on Plan 4. It extends marginally beyond the District Council boundary, incorporating Halesworth and Southwold to the north, and Felixstowe and Kesgrave to the south. Ipswich town centre is not included within the catchment area. The area includes the six town centres, and has been divided into ten Zones on the basis of postcode sectors.

ESTIMATES OF POPULATION IN THE SURVEY AREA

8.8 Population estimates and forecasts for each of the survey Zones were prepared from the MapInfo system. This provides estimates of population in 2001, 2006, 2011 and 2016. The MapInfo data has been derived from the 'official media estimates of population by local authority area, latest population projections and other indications of population change'. It does not utilise the latest 2001 census data, which is not yet available for small, localised areas. CB Hillier Parker has interpolated the population figures for 2003. Overall, the population of the whole survey area is currently 124,342. It is forecast to rise to 126,369 by 2006, an increase of 2%. By 2011 the population is forecast to rise to 129,423; and again to 132,371 in 2016.

AVAILABLE EXPENDITURE IN THE SURVEY AREA

8.9 The MapInfo system also provides an estimate of per capita expenditure for convenience and comparison goods in 2000. We have made deductions for special forms of trading which represent expenditure not available to spend in the shops. We have currently applied uniform per capita expenditure figures across the survey area. While this may mask localised variations in available spend, it enables a comparison on the same basis across the whole area.

8.10 In terms of the expenditure growth in the district, we have drawn on the ultra long-term convenience and comparison goods growth rates provided by URPI. 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. URPI estimate a convenience goods growth rate of 0.1% per annum and a comparison goods growth rate of 3.6% per annum.

8.11 A 3.6% 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 £183m. It is forecast to increase by approximately 8% to reach £198m by 2016. The available expenditure on comparison goods in the same area is currently £316m and it is forecast to increase by about 68% to reach £532m by 2016.

FLOORSPACE DATA

8.12 The comparison and convenience goods floorspace data used in our modelling has been drawn from the Institute of Grocery Distribution (IGD) report and Suffolk Coastal District Council. 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.

TOWN CENTRE ANALYSIS

FELIXSTOWE

i) Convenience Goods

8.13 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 a total town centre convenience trade draw. The trade draw of the convenience stores in Felixstowe town centre is made up of main food and top up food and convenience goods shopping.

8.14 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.

8.15 Table 3 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). In total, we estimate that the Co-op Solar has a turnover of approximately £10.3m. This equates to a sales density of circa £6,500 per sq m net. Compared to an estimated 'average' sales density for Co-op of £5,210 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 £7.3m. This equates to a convenience goods sales density of circa £23,800 per sq m net. This is significantly above the level of trade based upon estimated company average sales densities for Tesco (circa £11,338 per sq m net). This is not altogether surprising considering the store is considerably smaller than the majority of Tesco Superstores.

8.16 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 £4.3m, equating to an average turnover of £5,530 per sq m net. We should emphasise that, while based on up to date survey material, these estimates are inevitably subject to wide margins of error. Furthermore, based on the significance of the tourist industry in Felixstowe, we consider it is realistic to assume that the turnover of foodstores in Felixstowe could be approximately 5% to 10% higher than the figures quoted above. They suggest that overall, the convenience sector of the town centre is performing reasonably well.

8.17 We estimate that the total convenience goods turnover of Felixstowe town centre is currently approximately £21.9m (Table 4). Based upon the net sales floorspace of approximately 2,680 sq m, Felixstowe currently has a convenience goods sales density of £8,179 per sq m net (Table 5). This is above our estimate of company 'average' sales densities for the principal and local foodstores in the town centre (£5,707 per sq m net). Adopting this average as a benchmark, and based on current market shares, we have identified a notional capacity for up to 835 sq m net of convenience goods floorspace by 2016.

8.18 The out of centre Safeway at Cavendish Park, which opened in 1990 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 Safeway in Zone 1 is 74%. Safeway 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.

8.19 We estimate that the Safeway currently has a turnover of approximately £12.7m (Table 7) 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 1,835 sq m, the sales density of the store is approximately £7,000 per sq m net (Table 8). The sales density is below the level based upon Safeway's company average sales densities (£7,947 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.

8.20 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 9.

ii) Comparison Goods

8.21 Turning to the comparison goods sector, Table 3 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 Survey Zone 1 and to a lesser extent Zone 2. It draws almost 50% of comparison goods trade from Zone 1 and 15% from Zone 2. Felixstowe also draws a small proportion of trade from Zone 3, 4, 5, 7, 8 and 9.

8.22 On the basis of these market shares, we estimate that Felixstowe town centre currently has a comparison goods turnover of approximately £41.7m. With an existing shop floorspace of approximately 10,900 sq m net, we estimate that Felixstowe has a sales density of approximately £3,800 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.

8.23 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.

8.24 Based upon existing market shares, we forecast that there will be some limited capacity to support further comparison goods floorspace in Felixstowe by virtue of growth in population and available expenditure. We estimate that by 2006, based on current market shares, there would be theoretical capacity to support an additional 783 sq m net of comparison goods floorspace increasing to approximately 4,381 sq m net by 2016. 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.

8.25 Food and non-food catchment areas relating to Felixstowe are illustrated on Plans 5 and 13.

WOODBRIDGE

i) Convenience Goods

8.26 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 Zone 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.

8.27 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 £10.9m (Table 10). Based upon a net sales floorspace of approximately 1,246 sq m, Woodbridge currently has a convenience goods sales density of £8,746 sq m net (Table 11).

8.28 The overall performance of convenience stores in Woodbridge town centre masks variation in the performance of individual stores. In total we estimate that the Budgens has a turnover of approximately £4.8m. This equates to a sales density of £8,992 per sq m net. Compared to an estimated average sales density for Budgens of £5,245 per sq m net, this indicates that the store is trading well. We estimate that the town centre Co-Op has a turnover of approximately £2.7m in 2003. Based upon the floorspace of 113 sq m net, we estimate that it has a sales density of approximately £23,681 per sq m net (Table 11a). This is significantly above a notional 'company average' sales density for Co-op, but reflects the size of the store.

8.29 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 £3.3 million, equating to an average turnover of £5,677 per sq m net. In addition to the inherent margins of error in such assessment, based on the significance of the tourist industry in Woodbridge, we consider it realistic to assume that the turnover of foodstores in Woodbridge could be approximately 5-10% higher than the figures quoted above during the tourist season.

8.30 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 £4,887 sq m 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 2016, of circa 566 sq m net.

8.31 However, as this 'capacity' largely arises as a result of the diversion of trade from existing town centre facilities, it is not appropriate to employ this figure as justification for more out of centre provision.

8.32 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.

ii) Comparison Goods

8.33 Table 9 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 26% of comparison goods trade from Zone 5, 25% from Zone 4 and 21% from Zone 2. Relatively high market shares are also apparent in Zone 9 (16%), Zone 8 (11%) and Zone 8 (8%). This is reasonably encouraging given the competition Woodbridge faces in the comparison sector, both from Ipswich and retail warehousing on the Ipswich Eastern fringe.

8.34 On the basis of current market shares, we estimate Woodbridge town centre currently has a comparison goods turnover of approximately £30.4 million. Based upon an existing shop floorspace of approximately 5,693 sq m net, we estimate that Woodbridge has a sales density of approximately £5,344 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 3,194 sq m net during the Plan period, provided the centre is able to maintain its market share.

8.35 Food and non-food catchment areas for Woodbridge are illustrated on Plans 7 and 14.

ALDEBURGH

8.36 Table 12 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.

8.37 We estimate that overall Aldeburgh Town Centre has a convenience goods turnover of approximately £1.5m. Based on the existing shop floorspace of 561 sq m net, we estimate that Albeburgh has a convenience sales density of approximately £2,640 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, suggesting increased competition from within the catchment area.

8.38 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 under £1m. Within existing shop floorspace of 178 sq m net, we estimate a sales density of approximately £5,450 per sq m net, i.e. broadly in line with estimated 'company average' sales densities for Co-op foodstores.

8.39 Our analysis suggests that trading conditions in the main town centre foodstore are 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. During the summer months we consider that income derived from tourism could increase the turnover levels quoted above by approximately 10% to 15%. Furthermore, the presence of a significant number of generally affluent people who own second homes in the centre are likely to support many of the specialist and 'upmarket' convenience retailers in the centre.

8.40 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 has never been implemented and based on our qualitative assessment of Aldeburgh and strong trade draw to the main competitors in Leiston and Saxmundham, we consider there is still scope to increase market shares and develop or extend additional quality foodstore provision in Aldeburgh. The constrained town centre presents limited opportunities and we consider this out of centre retail allocation is appropriate in Aldeburgh. Development opportunities are discussed further in Section 9.

8.41 Our modelling indicates that based on current market shares, there is no capacity to support further convenience goods floorspace over the period to 2016. However, while the attraction of Aldeburgh as a tourist destination, and to the 'second homers' is unlikely to be diminished, the centre's relatively isolated location means it is more reliant upon its convenience shopping function than larger centres. We consider the existing provision is insufficient to meet the qualitative needs of the local population, and the Council should continue to support the provision of a new food supermarket, which would subsequently increase Aldeburgh's market share of convenience goods trade. The convenience goods catchment area for Aldeburgh is illustrated on Plan 8.

SAXMUNDHAM

8.42 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.

8.43 We estimate that Saxmundham town centre has a total convenience goods turnover of approximately £12.8m (Table 16). With a net convenience goods sales area of approximately 1,173 sq m, the sales density of the town centre is approximately £10,944 per sq m net. This is more than double our estimate of 'company average' sales densities for the main and local foodstores in the town centre (£4,782 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.

8.44 The overall performance of convenience stores in Saxmundham town centre masks variation in the performance of individual stores. We estimate Somerfield has a turnover of £11.9m, equating to a sales density of approximately £18,750 per sq m net. This is significantly above the Somerfield company average of £5,018 per sq m net, and above the average turnover achieved by the leading superstore operators. This suggests the store is trading very well.

8.45 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 823 sq m net of further convenience goods floorspace in Saxmundham over the period to 2016 (Table 17). 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. The potential to extend the existing Somerfield could be examined as one option to meet the identified need. The convenience goods catchment area for Saxmundham is illustrated on Plan 9.

LEISTON

8.46 Table 18 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.

8.47 We estimate that overall, Leiston town centre has a convenience goods turnover of approximately £8.2m. Based upon the existing shop floorspace of 815 sq m net, we estimate that Leiston has a convenience sales density of approximately £10,097 per sq m net.

8.48 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 conveneience goods turnover of £7.8m. With an existing shop floorspace of 424 sq m net, we estimate a sales density of approximately £18,280 per sq m net. This is considerably above estimated 'company averages' to the size of the store and the relatively weak food provision present elsewhere in the town centre.

8.49 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 £0.5 million, equating to an average turnover of £1,215 per sq m net. Unlike the other centres assessed as part of this study, Leiston does not have the same scale of top up trade from the tourist industry, and with the exception of Co-Op Solar, we consider the convenience sector of Leiston is potentially vulnerable.

8.50 Our retail capacity modelling indicates that there is a very limited residual capacity for further convenience goods floorspace in Leiston over the period to 2016. We have calculated a notional 'capacity' for approximately 490 sq m net in 2016, largely as a consequence of the strong trading position of the Co-Op Solar against the nominal 'average' figure employed. 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. The convenience goods catchment area for Leiston is illustrated on Plan 10.

FRAMLINGHAM

8.51 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.

8.52 We estimate that Framlingham has a total convenience goods turnover of approximately £6.2m (Table 22). With a net convenience goods sales area of approximately 1,307 sq m, the sales density of Framlingham town centre is approximately £4,759 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 (£4,991 per sq m net) (Table 23/23A).

8.53 We estimate that the Co-Op in Framlingham town centre has a turnover of approximately £5.4m. This equates to a sales density of £5,991 per sq m net. This is broadly in line with our expectations for this type of store. 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 £0.8 million, equating to an average turnover of £2,005 per sq m net. Again, this is broadly in line with our expectations for the centre.

8.54 Framlingham is an important tourist destination and we would expect that expenditure derived from tourism could add approximately 10%-15% to the turnover of retailers in the town centre. However, on the basis of our qualitative and quantitative assessments, we do not consider that there is any quantitative need for additional food retailing in Framlingham. Within the inherent limitations on the role of the centre, the existing provision appears to be serving the town centre adequately. The convenience goods catchment area for Framlingham is illustrated on Plan 11.

IPSWICH EASTERN FRINGE

8.55 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 Sainsburys, Warren Heath. We have also looked at trade draw to the Euro Retail Park and Beardmore Retail Park.

8.56 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.

8.57 We estimate that in 2003 the three stores draw approximately £60m from the survey area. The Tesco at Martlesham Heath has the greatest influence, drawing approximately £44m of convenience goods trade. To put this figure in context, the Tesco at Martlesham Heath is drawing 24% of total convenience goods available expenditure from the survey area. The Tesco store at the Kesgrave is drawing approximately £6.3m from the survey area, or 3.4% of total available convenience goods expenditure. The Sainsburys at Warren Heath is drawing approximately £9.8m of total convenience goods trade or 5.3%.

8.58 Overall, the three foodstores draw 33% 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.

8.59 The 'Euro Retail Park' and 'Beardmore Retail Park' draw comparison goods trade from each of the 10 Zones within the Study Area. The largest trade draw comes from Zone 3 (15%), Zone 8 (12%), Zone 5 (11%) and Zone 4 (10%). Trade draw from the remaining Zones fall off to below 10%. We estimate that in 2003 the two retail parks draw approximately £27m from the Zone 1 to 10 survey area. Overall, the two retail parks draw 8.5% of total comparison goods trade from the defined survey area. In terms of general comparison goods retailing, Ipswich is likely to draw a much more substantial proportion of trade from the survey area.

8.60 The food and retail warehousing catchment areas for the Ipswich Eastern Fringe are illustrated on Plans 12 and 15.

SUMMARY

8.61 Despite being the largest town in the District, Felixstowe's convenience goods trade draw is relatively self contained. This is partly due to its location on the Felixstowe peninsula and partly due to competition from elsewhere in the catchment, notably the Ipswich Eastern Fringe to the north/west. We consider that the town centre convenience goods provision is currently trading well.

8.62 Our retail capacity modelling indicated limited residual capacity for further convenience goods floorspace in Felixstowe over the period to 2016, although we consider there is the potential to recapture trade 'leaking' to the Ipswich Eastern Fringe through the development of a new foodstore. Development opportunities are discussed further in Section 9.

8.63 We consider that Felixstowe is trading adequately in terms of comparison goods and have identified some capacity to support an additional 783 sq m net of comparison goods floorspace increasing to approximately 4,381 sq m net by 2016. While this would not support any significant non-food shopping development, it indicates there is potential to promote limited redevelopment in the centre in order to consolidate and enhance its existing provision.

8.64 We consider that foodstores in Woodbridge town centre are currently performing well, despite the competition from out of centre stores. Our assessment has identified limited residual capacity for further convenience goods floorspace based on existing market shares. We consider there is the potential to increase market shares sufficiently to support a new quality foodstore or to improve the existing provision, providing town centre opportunities can be identified. Our assessment has identified some capacity for additional comparison goods floorspace. However, further out of centre convenience/comparison shopping development would be likely to reduce the market share of Woodbridge, and could prejudice such opportunities.

8.65 Town centre foodstores in Aldeburgh draw very little trade from the catchment area. While existing facilities appear to be performing poorly, our analysis ignores the significant contribution that tourism and 'weekend' sales make to supporting the specialist retailing which increasingly characterises the centre.

8.66 Aldeburgh is relatively isolated and its function as a small historic market town means it is more reliant upon its convenience shopping function than larger centres. Notwithstanding the strength and attractiveness of the centre, we consider the existing provision is insufficient to meet the needs of the local population. There is an opportunity to increase the market share of Aldeburgh and to consider opportunities for a qualitative improvement in foodstore provision to halt and draw back trade currently lost from the local catchment area by the provision of a well located, quality food supermarket.

8.67 Saxmundham draws trade from a marginally wider area than the other small town centres. This reflects its location on the main road network and the key role that the main foodstore, Somerfield, plays in contributing to the town centres vitality and viability. The town centre as a whole is trading well. We consider there will be some residual capacity for further convenience goods floorspace in

Saxmundham over the plan period including the expansion of Somerfield and/or provision of an additional foodstore in the centre.

8.68 Leiston town centre has a tightly defined catchment area. We consider town centre food provision is trading well although food provision in Leiston is dominated by the Co-op Solar and supplementary food provision has a significantly weaker performance. Our retail capacity modelling indicates very limited residual capacity for further convenience goods floorspace over the plan period. Our assessment of Leiston has highlighted the important role of food retailing in the town centre and the potential vulnerability of Leiston to the effects of and diversion of convenience retail trade.

8.69 Framlingham also has a tightly defined convenience goods catchment area. We consider that the existing foodstores are performing adequately, and are consistent with the everyday needs of the local shopping population. On the basis of our qualitative and quantitative assessment, we do not consider that there is any quantitative need for additional food retailing in Framlingham over the plan period.

8.70 Our retail capacity modelling identified the significant influence of the Ipswich Eastern Fringe on shopping patterns within Suffolk Coastal District. The three stores in this area currently draw approximately £60m from the survey area equating to 33% of total convenience goods trade from the defined survey area. We consider the Council should be concerned that the further growth of convenience and comparison retailing in the Eastern Fringe could further erode the role of the market towns.

8.71 Our capacity analysis indicates the potential which exists to provide new, quality main foodstore provision to redirect some of this trade back into the traditional town centres in the District, which should continue to form the main focus of the Council strategy. Any further expansion of the existing out of centre main foodstores, and diversification of their current offer, is likely to reduce further the market share of existing town centres.

9. DEVELOPMENT OPPORTUNITIES

9.1 In this section, we have assessed the scope for accommodating new development in the Suffolk Coastal District towns. Drawing on our qualitative and quantitative analysis, including our assessment of retailer demand, it is evident that there is a need to identify opportunities for further retail development in the towns of Felixstowe, Woodbridge, Aldeburgh and Saxmundham. In Leiston and Framlingham, the Replacement Local Plan strategy will need to focus on sustaining and enhancing the existing provision.

9.2 In examining the scope for new development in Suffolk Coastal District, we have considered the sequential approach to new development, examining each site in terms of the suitability, viability and availability for retail development.

FELIXSTOWE

9.3 Our assessment of Felixstowe in previous sections has recognised a qualitative deficiency in convenience goods retailing, a demand from food retailers to locate in Felixstowe, and a significant leakage of convenience goods trade to the Ipswich Eastern Fringe. We therefore conclude that a need exists in Felixstowe for a qualitative improvement in convenience goods retailing.

9.4 The preferred option in policy terms would be a foodstore development within the town centre. Such development is, however, physically constrained by large areas of housing and important town centre car parks. Highfield Road is recognised in the adopted Local Plan as being the only likely opportunity to enable redevelopment, although we consider this site is too small and physically constrained for a new town centre foodstore. It may be more appropriate for comparison goods retailing. The railway station site that may have the potential for such a development has in place a restrictive covenant. Development proposals for a new town centre foodstore or decisions regarding town centre site retail allocations would require further investigation and a detailed assessment considering complex land assembly issues.

9.5 If, following such investigations, a town centre site is not identified, it may be appropriate to look further afield. Foodstore development in the form of a planned district centre may be appropriate, as part of a comprehensive development including housing. One possible option which warrants consideration is the Trimleys which, despite their size, do not have significant local shopping facilities. If, after further analysis of the alternatives, this was considered to be the favoured option it would be necessary to investigate further the most appropriate scale and form of any new centre taking into account housing targets, likely shopping patterns and impact on the town centre.

WOODBRIDGE

9.6 Like Felixstowe, our assessment of Woodbridge has recognised a qualitative deficiency in convenience goods retailing, a demand from food retailers to locate in Woodbridge, and a significant leakage of convenience goods trade to the Ipswich Eastern Fringe. In particular, a large amount of trade passes Woodbridge on the A12 from locations north of Woodbridge to Tesco at Martlesham Heath, south of Woodbridge. There is potential for Woodbridge to re-capture trade lost to the Ipswich Eastern Fringe.

9.7 We consider there is a need for an improvement to town centre convenience goods provision. Out of centre development would only have the affect of impacting quite significantly on the shopping role of the town centre. Again, Woodbridge is a small historic town centre, physically constrained by the built environment. Budgen's has planning consent, subject to completion of a Section 106 Agreement, to extend the store. Policy AP255 in the adopted Local Plan enabled this development opportunity to be realised: -

> *"The District Council has recognised the benefit of additional, quality, convenience floorspace within the town centre….One way to provide this is through the expansion of the existing Turban Centre food supermarket, together with public parking. The development should serve to preserve or enhance the character and appearance of the Conservation Area and its setting, and should be landscaped to a high standard*." (Policy AP255).

9.8 A further development opportunity exists on the Old School Site, New Street. The school site lies outside, but adjacent to the town centre boundary, north of the Thoroughfare. The site is approximately 7,430 sq m and is currently accessed via New Street, a one-way street. The road network is particularly narrow in this part of the town centre. Adjacent land uses include the Oak Lane car park, which could provide direct access through to the Primary Shopping Area. The County Council is seeking the redevelopment of the school site on New Street in order to finance the construction on Pytches Road of a modern purpose built school with playing field.

9.9 The site is currently allocated for mixed use development in the adopted Local Plan, 2001: -

> *"Land at New Street/Oak Lane, Woodbridge, as shown on the Proposals Map, is allocated for a mixed-use development which must conform with the following principles:*
>
> *(i) the provision of additional car parking spaces;*
>
> *(ii) the retention of the form and character of the main school building;*
>
> *(iii) development not being located and laid out so as to prejudice the opportunities for the rear servicing of properties along the Thoroughfare;*
>
> *(iv) the preservation and enhancement of the Conservation Area;*
>
> *(v) the safeguarding of residential amenity;*
>
> *(vi) traffic not being generated so as to attract large numbers of additional vehicles (particularly service vehicles) into the historic core of Woodbridge;*
>
> *(vii) any retail development must conform to general policies AP55 to AP61, particularly in respect of the potential impact on the primary shopping core of the town centre."*
>
> (Policy AP256)

9.10 We consider that, if feasible, the development of a new foodstore on this site would enhance significantly Woodbridge town centre, consolidating its food shopping function and re-capturing some of the existing trade lost to food retailing in the Ipswich Eastern Fringe. The development would be highly visible from the Oak Lane car park which is the main link through to the primary shopping area. A new foodstore would also benefit from excellent integration with the town centre and act as an additional key anchor retailer.

9.11 We understand that non-retail proposals are currently being actively considered on this site. Depending on the stage these have reached, it may be appropriate to re-examine the retail potential of the site. However, we recognise that the size of the site, constrained access and environmental sensitivity of the location may ultimately mean that it is not possible to accommodate a store of sufficient scale to recapture main food expenditure lost to Tesco.

ALDEBURGH

9.12 Our assessment has indicated a significant qualitative deficiency in convenience goods retail provision in Aldeburgh and a significant loss of trade to Leiston, Saxmundham and Tesco, Martlesham Heath. Such shopping patterns result in long and frequent car trips that would be unnecessary if the local population had adequate quality and choice of convenience goods in Aldeburgh. We have identified no appropriate development opportunities on the town centre High Street which lies within a Conservation Area, Area of Outstanding Natural Beauty and which is physically constrained by the built environment. The only evident development opportunity is on land at Saxmundham Road which has the benefit of an extant consent.

9.13 The Saxmundham Road site lies outside the allocated town centre boundary but within the Heritage Coast and Area of Outstanding Natural Beauty. The site is allocated on the Proposals Map for a small supermarket of up to 470 sq m (5,000 sq ft). The Local Plan states that a larger store would be acceptable only if it could be shown that it would have no detrimental impact on the vitality and viability of the town centre. The development of a foodstore in Aldeburgh is promoted through Policy AP131 of the adopted Local Plan, 2001: -

"Subject to a safe highway access and appropriate parking provision being provided, land at Saxmundham Road, as shown on the Proposals Map, is identified as being suitable for the development of a supermarket. This shall not exceed 470 sq m (5,000 sq ft) net floorspace and be built to a high standard of design and materials with appropriate landscaping."

(Policy AP131)

9.14 As outlined in Section 8, 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 although the application has never been implemented. We consider this out of centre retail allocation is appropriate in Aldeburgh. It is a town in need of a qualitative improvement in convenience goods provision but has no clear town centre development opportunity.

9.15 While clearly 'out of centre', the land at Saxmundham Road is located on the main road access route to Aldeburgh in an area of extensive housing and 'walk-in' population. Convenience goods trade re-captured from elsewhere in the District will also re-capture comparison and service goods trade lost through linked trips to other town centres, thus strengthening the town centre shopping function.

SAXMUNDHAM

9.16 Our qualitative assessment of Saxmundham identified a centre that was, on the whole, trading well, although floorspace and composition figures suggests that Saxmundham could be a vulnerable centre, competing with non-retail uses. Our quantitative analysis identified some residual capacity for further convenience goods floorspace in Saxmundham over the plan period. We consider the town centre would benefit from a further key anchor foodstore, to safeguard the convenience shopping role of Saxmundham and the future health of the town centre.

9.17 Like the other town centres in the district, Saxmundham is a small historic town centre constrained by the physical environment. Any new development would have to consider the town centre location within the conservation area. We consider a possible opportunity for a new foodstore allocation in the Local Plan is the area to the north of the town centre on land currently occupied by a range of uses including the bus station, telephone exchange and land to the rear of Farm Road. A large housing allocation is identified on the Proposals Map adjacent to this general area and the benefits of changing a small area of this housing allocation to a retail allocation would have to be carefully considered.

9.18 Any such retail allocation within Saxmundham would be subject to a detailed site appraisal addressing in particular complex land assembly issues. There are currently a range of land ownerships and uses in this area. A new foodstore in this area of the town centre would benefit from a highly visible foodstore which would fully integrate with existing retail uses in the town centre, thus consolidating the town centre's shopping function.

9.19 A new anchor foodstore development in Saxmundham, or further significant expansion of existing facilities, may have the effect of redirecting some convenience goods trade from Leiston town centre, and to a lesser extent Framlingham. In the absence of comparable opportunities in these centres, we do not consider this concern is such as to outweigh the benefits of improved food retailing to Saxmundham, and the District as a whole. However, the effects of any new foodstore development on these centres is likely to be a key factor influencing the scale of new development which may be appropriate.

10. CONCLUSIONS AND RECOMMENDATIONS

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

- The broad thrust of national planning policy is wherever possible to sustain and enhance existing centres, and to plan positively for new development within them, consistent with their respective roles and the needs of the catchments. PPG6 indicates that the key role for the Local Plan is, within the context of the Structure Plan retail hierarchy, to consider existing provision and identify sites for development. The Local Plan must consider the need for further retail floorspace in the District and where a need is identified a sequential approach must be adopted to selecting sites for new retail development.

- PPG6 recognises that development plans cannot anticipate every proposal for retail development likely to come forward over the plan period; in these circumstances it endorses the use of criteria based policies in the Local Plan for developing outside existing centres, which should include inter alia consideration of need, the sequential approach, impact and accessibility. National transport policy seeks to reduce travel by car and encourage alternative means of travel. The Local Plan should therefore seek wherever possible to ensure that new development is located in existing centres, served by a variety of means of transport.

- RPG6 seeks to maintain and enhance the towns and cities of East Anglia and create a high quality of urban life. In accordance with PPG6, local authorities are to take account of need and the sequential approach, and the region's existing town and city centres should continue to be the main focus for the social and economic life of communities. The document notes that the pressure for retail and leisure developments can be expected to continue.

- The Structure Plan recognises that out migration from London, investment in transport links and shortages of development land are encouraging the dispersal of investment from Cambridge into Suffolk. The Ipswich Policy Area, Bury St Edmunds and Lowestoft are intended to take the leading strategic role in accommodating new employment. The Ipswich Policy Area and Bury St Edmunds are proposed to fulfil the same role for housing.

- The Structure Plan aims to maintain and enhance the vitality and viability of the six town centres in the District and to ensure that development is of scale and nature appropriate to a town's position in the settlement hierarchy. Policies incorporate the sequential approach for new development as outlined in PPG6, and acknowledge cases where retail developments under the 2,500 sq m gross floorspace threshold may require a Retail Impact Assessment.

- Part 1 of the adopted Local Plan addresses general town centre policies and Part 2 provides a detailed overview of specific area policies including each of the six town centres. We consider the Local Plan effectively covers important issues and plans effectively for the future of the town centres, in particular considering the need for new development, the sequential approach, identification of development sites, preventing the loss of town centre retailing, enhancing the environment and car parking provision.

- National retail trends indicate a contraction in the number of shop units and slowdown in the growth of retail sales, which may reduce the scope for further retail floorspace in the District. Other key trends, which are likely to have less predictable effects, include the polarisation by retailers towards larger centres, the growth of internet shopping and changes in retailers formats and operational strategies. Reflecting the changes underway in the retail sector, and the challenges facing some of the smaller town centres, it is important to consider the relative role and function of the centres in the District and the extent to which they are serving the shopping needs of all residents.

- 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.

- We have not identified any significant proposals in the pipeline for Stowmarket, but future development in Lowestoft could have implications for retailing in Suffolk Coastal District. The centre is more similar in size and retail offer to the smaller town centres. The attraction of Lowestoft as a shopping destination will be strengthened following the development of the mixed use development at South Quay, two new foodstores and an out of centre DIY store.

FELIXSTOWE

- Our qualitative assessment of Felixstowe highlighted a vital and viable town centre. Whilst Felixstowe has an above average representation of comparison goods retailers, it does not have a department store and there is a weak representation of quality multiple retailers. This reflects the strength and influence of Ipswich, a higher order centre, and the generally small size of retail units. The local population has an adequate choice and range of food shopping facilities, and service business representation is generally in line with the national average.

- Prime retail rents and yields in Felixstowe are not as strong as in the larger competing centres, reflecting the lower order position of Felixstowe in the wider catchment retail hierarchy. Rents and yields in Felixstowe have improved, however, since 1997. Vacancy rates are in line with the national average suggesting the town centre is experiencing no serious problems in attracting and maintaining retailers. Surveys highlighted a high level of re-occupation, although a large proportion of new retailers are service providers.

- Our analysis of pedestrian flows in Felixstowe suggests that there has not been any significant shift in the focus of retail activity in the town centre since 1997, and that Hamilton Road, between Orwell and Cobbold Road continues to be the principal retailing area in the town centre. The Co-Op Solar and Homebase remain a strong pull in the north of the town centre.

- Felixstowe town centre developed as a spa town and seaside resort in the nineteenth century. The southern part of the town centre has consequently been designated a conservation area to preserve this heritage. There are a number of more modern, less attractive buildings which could be enhanced through investment. The 'triangle' has visibly benefited from recent investment creating an attractive landscaped focal point. An extension of this type of project together with opportunities for pedestrianisation would add significantly to the town centre environment.

- Our quantitative assessment of Felixstowe highlighted that, despite being the largest town in the District, Felixstowe's convenience goods trade draw is relatively self contained. This is partly due to its location on the Felixstowe peninsula and partly due to competition from elsewhere in the catchment, notably the Ipswich Eastern Fringe to the north/west. Overall, our assessment highlights good trading levels of existing foodstores and little residual capacity for any significant additional floorspace. We consider there is, however, the potential to increase market shares by recapturing some of the main food expenditure 'leaking' to the Ipswich Eastern fringe through the development of a new foodstore. The priority for such development should, however, be to enhance the convenience retail offer in defined centres.

- Based upon existing market shares, we forecast that there will be some limited capacity to support further comparison goods floorspace in Felixstowe by virtue of growth in population and available expenditure. We estimate that by 2006, based on current market shares, there would be theoretical capacity to support an additional 783 sq m net of comparison goods floorspace increasing to approximately 4,381 sq m net by 2016. 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.

- In terms of town centre foodstore development opportunities, Felixstowe is physically constrained by large areas of housing and important town centre car parks. Following a detailed investigation considering complex town centre land assembly issues, and housing and other needs, it may be appropriate to investigate the development of a new district centre as part of a comprehensive development including housing. Such an allocation in the Local Plan would be subject to further work assessing the most suitable location for a comprehensive development of this type.

WOODBRIDGE

- Our qualitative assessment of Woodbridge identified an attractive, vital and viable market town, and an important tourist centre. Whilst Woodbridge has a strong representation of comparison goods retailers the town centre has a relatively limited provision of 'mainstream comparison retailers' and is instead dominated by independent and more specialist retailers targeted towards visitors and tourists. The local shopping population is likely to choose to travel to Ipswich for their main comparison goods shopping.

- Prime Zone A rental levels and Prime Retail Yields in Woodbridge are both weaker than competing centres in the wider area, although both indicators have improved since 1997.

The proportion of vacant units is below the national average, following a fall in number since 1997. For its size and status, we consider Woodbridge is performing well at present.

- Pedestrian flows in Woodbridge town centre are concentrated on the Thoroughfare within the Prime Shopping Area. Our analysis suggests there has not been any significant shift in focus of retail activity in the town centre since our previous study in 1997. The lowest pedestrian counts were recorded in Gobbitts Yard. Accessibility to Woodbridge is good. It is located on the primary road network, and is served by bus and rail. The quality of the built environment with its unique historic form and character is protected with Conservation Area designation. There is noticeable investment throughout the town centre on general environmental improvements including the upkeep of buildings and cleanliness of streets.

- 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 2016, of circa 566 sq m net. However, as this 'capacity' largely arises as a result of the diversion of trade from existing town centre facilities, it is not appropriate to employ this figure as justification for more out of centre provision.

- 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 town centre quality foodstore or to improve the existing provision if a suitable site could be identified.

- 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 3,194 sq m net during the Plan period, provided the centre is able to maintain its market share. Again, the potential to accommodate any additional comparison goods is limited by the presence of Ipswich and lack of sites.

- In terms of development opportunities we consider the old school site on New Street would be potentially appropriate for a town centre format foodstore, although it is currently the subject of non-retail proposals. Development options would also require careful consideration of a range of issues including the size of the site, constrained access and environmental sensitivity. If a development could be realised it would help consolidate the town centre's shopping role and recapture existing trade lost to the Ipswich Eastern Fringe.

ALDEBURGH

- Our detailed assessment highlights an attractive network of historic town centres throughout Suffolk Coastal District. Vitality and viability indicators drawn from our on-site surveys reflect varying degrees of 'health' within the smaller town centres. In summary, we consider Aldeburgh is an unspoilt and attractive centre, performing well in terms of its vitality and viability indicators.

- The town centre has a relatively high proportion of A3 service uses reflecting the tourist function of the town centre. Comparison goods provision is more limited with very few national multiple retailers. The main convenience goods provision comprises Co-Op and other specialist operators, although main food shopping requirements are supplemented by larger facilities in neighbouring centres. Vacancy rates have been consistently low; although these have risen sharply since 2001, this is likely to be temporary in such a strong tourist destination. The highest pedestrian movements are on the main shop frontages outside Co-Op and the Post Office. The town is located entirely within the Heritage Coast and Area of Outstanding Natural Beauty, and the historic environment is maintained to an extremely high standard.

- Our quantitative assessment identified a limited trade draw from the survey area reflecting the limited 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. Our modelling indicates that based on current low market shares, there is no capacity to support existing convenience goods floorspace over the period to 2016. However, the low market shares reflect that existing provision is insufficient to meet the needs of the local population, and we consider a new foodstore would halt and draw back trade currently lost from the local catchment area subsequently increasing Aldeburgh's convenience goods market share. We identified capacity for an additional 244 sq m net of comparison goods floorspace, although the priority should be to re-occupy existing vacant units in the town centre.

- We have not identified any development opportunities in the town centre. In these circumstances we consider the existing allocation for a new foodstore on Saxmundham Road, an out of centre location, is suitable for such development. The site lies on the main access road into Aldeburgh town centre and is surrounded by large areas of housing. Ancillary retailing in smaller adjacent units should, however, be resisted due to the negative impact on town centre retailing. The priority should be the re-occupation of appropriately sized vacant units in the town centre.

SAXMUNDHAM

- Retail frontages in Saxmundham town centre are dispersed with a relatively high proportion of non-shop uses. The proportion of A2 Uses is also high for a centre of this size, reflecting a relatively weak A1 shopping provision. Floorspace and composition figures suggests that Saxmundham could be a vulnerable centre competing with non-retail uses. The number of vacant units has declined since 1997 suggesting a positive improvement in the health of the town centre. Saxmundham is easily accessible by road, bus and train, and the attractive built environment is protected with Conservation Area designation. There are, however, some signs of dilapidation and the need for investment.

- 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 823 sq m net of further convenience goods floorspace in Saxmundham over the period to 2016 (Table 17). 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. The potential to extend the existing Somerfield could be examined as one option to meet the identified need. We have identified capacity for 483 sq m net of comparison goods floorspace over the plan period to 2016.

- We consider the only other real development opportunity for a new town centre foodstore allocation in the Local Plan is the area to the north of the town centre on land currently occupied by a range of uses including the bus station, telephone exchange and land to the rear on Farm Road. A housing allocation is identified on the Proposals Map adjacent to this general area and the benefits of changing a small area of this housing allocation to a retail allocation would have to be carefully considered. Any such retail allocation within Saxmundham would be subject to a detailed site appraisal addressing in particular complex land assembly issues.

LEISTON

- In summary, the health check indicators reflect a potentially vulnerable centre. Unlike the other three smaller centres (Aldeburgh, Saxmundham and Framlingham), Leiston does not benefit from a strong tourist trade, and the consolidation of retail frontages is interrupted by a large range of residential and commercial uses. The proportion of A1 shop Uses is relatively strong, but Leiston has experienced a consistently high number of vacant units since 1997. Leiston has good access by bus and road, but there is no train station. The environment is less diverse in character and history than the other three town centres, and there are clear signs of dilapidation and lack of investment.

- Our retail capacity modelling indicates that there is a very limited residual capacity for further convenience goods floorspace in Leiston over the period to 2016. We have calculated a notional 'capacity' for approximately 490 sq m net in 2016, largely as a consequence of the strong trading position of the Co-Op Solar against the nominal 'average' figure employed. 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 to the existing Co-Op Solar over the plan period to retain Leiston's important food shopping role. Options could include a store extension or refurbishment if appropriate over the plan period. We do not consider there are any clear development opportunities at present.

FRAMLINGHAM

- In summary we consider Framlingham to be a vital and viable town centre. The Co-Op Solar provides a 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 local shopping requirements, and service businesses comprise a range of

A1, A2 and A3 Uses. We consider shopping provision in Framlingham to be relatively balanced. Vacancy rates have been consistently low since 1997, and the highest pedestrian movements are located on Market Place, where the main concentration of retailing is present. The town centre is relatively quiet with an attractive, historic and characteristic environment.

- Framlingham is an important tourist destination and we would expect that expenditure derived from tourism could add approximately 10%-15% to the turnover of retailers in the town centre. However, on the basis of our qualitative and quantitative assessments, we do not consider that there is any quantitative need for additional food retailing in Framlingham. Within the inherent limitations on the role of the centre, the existing provision appears to be serving the town centre adequately.

IPSWICH EASTERN FRINGE

- Ipswich, and the concentration of out of centre retailing in the Ipswich Eastern Fringe, has a significant influence on trading patterns in Suffolk Coastal District. The Tesco superstore at Kesgrave District Centre is the smallest and least influential foodstore in the Ipswich Eastern Fringe. It has a relatively small car park and meets the needs of the local shopping population. The Tesco superstore at Martlesham Heath and the Sainsbury's at Warren Heath are, however, much larger offering a comprehensive range of food products.

- Both foodstores have a range of non-food products including kitchenware, mobile phones, children's clothing, and electronic and domestic appliances. Non-food provision in the Sainsbury's store at Warren Heath is more extensive with a larger floorspace than the Tesco superstore at Martlesham Heath. The Sainsbury's permission has no condition restricting the amount of non-food retail floorspace. This out of centre non-food provision is in addition to the extensive durable goods retail warehouse provision in the Eastern Fringe.

- Our quantitative assessment highlighted that out of centre retailing in the Ipswich Eastern Fringe has a significant influence on shopping patterns within Suffolk Coastal District. Our retail capacity modelling identified the significant influence of the Ipswich Eastern Fringe on shopping patterns within Suffolk Coastal District. The three stores in this area currently draw approximately £60m from the survey area equating to 33% of total convenience goods trade from the defined survey area.

- This level of influence indicates the potential which exists to provide new, quality main foodstore provision to redirect some of this trade back into the traditional town centres in the District. Conversely, any further expansion of the existing out of centre main foodstores is likely to reduce further the market share of existing town centres. We estimate that the two retail parks currently attract approximately £27m from the Zone 1 to 10 survey area, equating to 8.5% of total comparison goods trade from the total survey area. In terms of comparison goods retailing, Ipswich is likely to draw a much more substantial proportion of trade from the survey area.

LOCAL PLAN REVIEW – RECOMMENDATIONS

10.2 Overall, we consider that the broad thrust of the objectives and shopping policies in the adopted Local Plan comply with national planning policy guidance and remain relevant in the context of our Retail Study. We recommend, however, that the District Council update these as appropriate in accordance with the findings of our research. It will be necessary to review certain policies to update the position since the Local Plan was adopted.

10.3 Part 1 of the adopted Local Plan addresses general town centre policies. Policy AP55 seeks to focus new retail development in established town and district centres, local centres and shops serving rural areas. This aim accords with national planning policy to sustain and enhance existing centres, and we consider the policy will remain appropriate during the Local Plan period.

10.4 National planning policy identifies the role of retail hierarchies, but acknowledges that the role of centres can change over time, and calls for effective planning at regional and local levels to provide adequate shopping facilities to meet client and future needs. Policy AP56 identifies the six town centres in the District. Our Retail Study has considered the position and role of each town centre and concludes they remain consistent with the definition in PPG6:

'In this guidance, the term 'town centre' is used generally to cover city, town and traditional suburban centres, which provide a broad range of facilities and services and which fulfil a function as a focus for both the community and for public transport. It excludes small parades of shops of purely local significance. The policy guidance in this PPG should be interpreted in a way that relates reasonably to the particular size of the town centre concerned.'

Policy AP56, The Suffolk Coastal Local Plan, 2001

10.5 Policy AP59 and AP60 address district and local centres. The policies aim to encourage retail and other commercial and community uses within these centres; the expansion and creation of new and similar centres; and the provision of local shops where need cannot adequately be met by existing facilities in the area. We consider these aims accord with national planning policy to encourage a wide range of facilities in district and local centres to meet the local shopping needs of the whole district. In the context of the Suffolk Coastal District, these district and local centres perform an important local function for the large residential areas which have, and are continuing to develop around them.

10.6 Policy AP61 is a criteria based policy dealing with proposals for new retail development. We consider the policy remains appropriate and consistent with national planning policy. It specifically addresses the sequential approach, impact and accessibility. A criteria based policy will remain appropriate for considering new development that comes forward over the Local Plan Review period. In light of the recent Ministerial Statement, April 2003 the District Council may wish to consider reinforcing/revising the criteria in this policy.

10.7 We consider that it will remain appropriate to restrict the goods to be sold from retail warehousing. We have not considered in detail within this report the quantitative case for further retail warehousing in the district. Whilst the retail warehousing provision is currently relatively limited, demand for further retail warehouse facilities is not very high and there are significant facilities available in neighbouring areas. In these circumstances, it is unlikely that a further retail warehouse development in the District will have sufficient 'critical mass' to compete with existing provision and will more likely impact on existing centres. This may however be a matter which the District Council would wish to consider further at some stage.

10.8 Part 2 of the adopted Local Plan provides a detailed overview of specific area policies including each of the six town centres. For each centre we suggest the promotion of targeted initiatives through a co-ordinated policy of Town Centre Management over the Plan Period. Town Centre Management can effectively address the individual needs of each town centre, outlined below.

FELIXSTOWE

10.9 Our detailed town centre survey and analysis identified Hamilton Road, between Orwell Road and Cobbold Road, as the main focus of retail activity. This focus remains unchanged since the 1997 Retail Study and we therefore consider the definition of the Primary Shopping Area in Policy AP179 remains appropriate. We consider the town centre boundary as defined on the Proposals Map is accurate.

10.10 We consider the objective to prevent the loss of ground floor levels to non-shopping uses in the Prime Shopping Area, whilst encouraging diversity of uses and mixed-use development elsewhere in the town centre, remains appropriate. The aim is to ensure a vital and viable town centre with a good balance of retail and service uses to meet the needs of the local catchment population.

10.11 To achieve the objectives of town centre vitality, viability and diversity it will be necessary to ensure the tourist economy is maintained through the continued concentration of attractions on the sea front, adjacent to town centre retail and service uses. The aim is to balance the function of Felixstowe to cater for the needs of the local catchment population and tourists, and to ensure the location of leisure attractions does not undermine the retail function of the town centre.

10.12 A number of environmental and physical improvements to Felixstowe town centre has been recognised in the Retail Study. The Local Plan Review should continue to encourage investment in town centre enhancement schemes to ensure it remains attractive to tourists and local shoppers. Policy AP186 remains appropriate although should be updated to consider completed enhancement schemes and newly identified areas of the town centre requiring improvement. We highlight some of the issues that could be considered in the Local Plan Review: -

- Retail fascias;
- Planting, landscaping and the creation of attractive focal points;
- Street furniture including seating, lighting, litter bins and cycle racks;
- The control of advertising boards particularly on attractive and historic buildings;
- The quality of the paved environment and road surfaces.

10.13 In relation to Policy AP182 and AP183, the District Council should continue to maintain full consultation and co-operation with Suffolk County Council and the Highway Authority to promote a pedestrian friendly town centre environment. Pedestrian priority and some traffic calming measures have been implemented throughout the town centre and opportunities to extend these should be considered. The pedestrianisation of Hamilton Road, between Orwell Road and Cobbold Road, should remain a key theme in the Local Plan Review and we would recommend a further feasibility work to continue researching this possibility. Key issues would include traffic impact on neighbouring streets, support from key retailers and servicing arrangements.

10.14 Although car parks did not appear heavily congested at the time of our Retail Study (April 2003), this situation is likely to change in the summer months due the inflow of tourists. We consider the objectives over the Local Plan Period should be to monitor car park capacity, and plan for additional off-street car parking if necessary.

10.15 We have identified an opportunity for additional convenience goods floorspace over the Local Plan Review period. At this stage, we have not identified any retail development sites in the town centre and recommend the Council assess a possible foodstore development as part of a comprehensive planned district centre development including housing. Further investigation of these options would be the subject of a feasibility study addressing complex land assembly issues in the town centre, the sequential approach, and impact on existing stores in Felixstowe.

10.16 We have not identified any significant need for further comparison goods provision in Felixstowe. We consider the priority should be to consolidate existing town centre provision with possible small-scale development as appropriate. Highfield Road, as proposed in the adopted Local Plan (Policy AP181), is a suitable location for such development.

WOODBRIDGE

10.17 We consider the Prime Shopping Area as defined in Policy AP257 remains appropriate based on evidence analysed in our Retail Study. The Thoroughfare, between Church Street and Elmhurst Walk, including Hamblin Walk, remains the main focus for retail activity in the town centre. The concentration of retail activity in this area of the town centre has been consolidated in recent years following the movement of the weekly market from Market Hill to the Hamblin Road car park.

10.18 We support policies AP257 and AP258 which prevents the loss of A1 retail usage at ground floor level in the Prime Shopping Area, Church Street and Market Hill. This policy will be necessary to ensure the continued vitality and viability of the whole town centre over the Local Plan Period.

10.19 The Local Plan Review should recognise the need to meet modern retailer requirements. Although there are limited development opportunities in the town centre, there will be opportunities to amalgamate smaller units to meet these requirements more fully. This should not, however, occur at the expense of the strong representation of key specialist type retailers that currently underpin the town centre's character, and vitality and viability.

10.20 In addition to attracting retailers, we suggest the promotion of targeted initiatives through a co-ordinated policy of Town Centre Management to encourage shopper loyalty, and through specific initiatives attract shoppers back from competing centres, in particular, Ipswich.

10.21 Gobbits Yard should be recognised as a potentially declining area of the town centre. Small, outdated retail units appear to have problems attracting and maintaining retailers, and despite being accessed from the Primary Shopping Area, pedestrian footfall is the lowest recorded in the town centre. The Local Plan Review may wish to promote this area for investment and physical improvement to create an attractive shopping 'courtyard'.

10.22 The integration of Church Street and Market Hill with the Primary Shopping Area should be actively promoted, particularly following the loss of the weekly market from this area of the town centre. It clearly benefits from an attractive, well maintained physical environment but is in danger from becoming increasingly separated from the Primary Shopping Area. We recommend pedestrian flow counts currently undertaken on the Thoroughfare, and in the Turban Shopping Centre and Gobbitts Yard, should be extended to Church Street and Market Hill to monitor this situation. A policy ensuring a mix of retail and service uses would encourage the 'health' of this area of the town centre.

10.23 Our Retail Study highlighted a unique and well maintained physical environment, rich in history and character. There is evidence of investment throughout the town centre including upgraded paving, seating and planting. We consider Policy AP260, 'Enhancement', remains appropriate but should be updated to reflect the current environment, completed enhancement schemes, and further areas of the town centre identified for environmental enhancement. We recommend a phased programme of improvements which may include:

- Retail fascias;
- Planting, landscaping and the creation of attractive focal points;
- Street furniture including seating, lighting, litter bins and cycle racks;
- The control of advertising boards particularly on attractive and historic buildings;
- The quality of the paved environment and road surfaces.

10.24 Policy AP263, 'Traffic Management', will remain appropriate over the Local Plan Review, although it should be updated in light of any recent measures implemented. It will be necessary to continue to monitor and assess measures to improve pedestrian priority which will in turn improve pedestrian movement between retail units in the town centre. Particular attention should be given to the Thoroughfare and linkages with Church Street and Market Hill. Car park capacity should continue to be monitored throughout the Local Plan period, and the provision of additional car parking implemented if necessary.

10.25 Our Retail Study considers there is a clear need to improve convenience goods provision in Woodbridge town centre. Out of centre development should be restricted due to impact on the town centre. Policy AP255 should be carried forward into the Local Plan review, but updated to reflect the resolution to grant consent subject to completion of a Section 106 agreement. Extension of the Turban Centre food supermarket should remain an allocation in the Local Plan review.

10.26 We consider improved/additional foodstore development in the town centre should continue to be promoted in the Local Plan Review. The Old School Site on New Street is a possible development opportunity to realise this objective, although further feasibility work would be necessary to address the size of the site, constrained access and environmental sensitivity. A development of this type would help consolidate the town centre shopping function and compete with neighbouring retail provision, particularly in the Ipswich Eastern Fringe. Policy AP256 should be revised accordingly.

10.27 At this stage we have not considered in detail further potential development opportunities in Woodbridge that could accommodate further comparison goods floorspace. We have identified some capacity, although our assessment of Woodbridge identifies that the centre is tightly constrained by the built environment. If sites are to be identified it would involve having to address a range of competing priorities for scarce land resources in and around the town. We consider the priority is to consolidate the existing provision and look to amalgamate some units to meet retailer requirements accordingly.

ALDEBURGH

10.28 We consider the role of Aldeburgh as a tourist destination should be actively promoted, but this should be effectively balanced with the shopping needs of the local resident population in accordance with national planning policy.

10.29 Our assessment of Aldeburgh identified an unspoilt and attractive centre, driven in many ways by tourism. On the whole it appears to be performing well. It will be necessary, however, to monitor the diversity of uses more closely over the Local Plan period due to the high proportion of A3 service uses identified. It is important to balance a growth in A3 uses with the retention of A1 retail uses. The District Council may wish to consider a policy to monitor and facilitate a range of 'uses'.

10.30 The physical environment in the town centre is maintained to an extremely high standard. Policies AP128 'Enhancement', AP129 'High Street' and AP130 'Pedestrian Priority' should, however, be carried forward and updated to promote the ongoing consultation and improvements to pedestrian priority, traffic management and the restriction of on-street parking on the High Street. The reduction of traffic and pedestrian conflict on the High Street should be the over-riding objective.

10.31 Our Retail Study highlighted a clear need for an improvement to foodstore provision in Aldeburgh in order to meet the needs of the local shopping catchment and to compete with neighbouring provision. We identified no suitable town centre sites, and consider the existing out of centre foodstore allocation at Saxmundham Road is an appropriate alternative. Policy AP131 should therefore be carried forward into the Local Plan review, but the policy should prevent the development of adjacent retail units which could be accommodated in the town centre. In line with national planning policy the priority should be to re-occupy existing vacant town centre units.

10.32 We identified little opportunity for additional comparison goods floorspace, and the priority should be to consolidate the existing comparison goods shopping function and the re-occupation of vacant units.

SAXMUNDHAM

10.33 We consider that Policy AP155 should be revised to ensure the protection of the retail function of the town centre. It will be necessary to monitor the diversity of uses more closely over the Local Plan period due to the high proportion of non-shop uses identified. The District Council may wish to consider a policy with which to monitor and facilitate a range of town centre uses on the main shopping frontages.

10.34 In terms of retail composition in the town centre, we consider the Local Plan review should protect the weekly market, and promote the enhancement of pedestrian linkages between the Somerfield foodstore and the town centre retail frontages. There is potential to improve the paving, lighting and signage along the 'short cut' route from the High Street to the Somerfield car park.

10.35 There are signs of dilapidation and the need for investment in Saxmundham town centre. The Local Plan review should continue to promote enhancement of the environment whilst protecting the character of the area. Policy AP152, AP153, and AP154, should be updated in the Local Plan Review. In particular, funding is now available to retailers for improvements to their premises through the Heritage Economic Regeneration Scheme (HERS). Funding has enabled recent works around the Market Place to enhance the area and improve pedestrian safety. Targeted areas for further improvement should be identified in Local Plan policies.

10.36 We have identified residual capacity for some additional convenience goods floorspace. While development opportunities are constrained by the built environment, we consider the Council should assess a possible store extension to the town centre Somerfield, or further feasibility work to identify possible land assembly issues. Our assessment concludes the preferred location for a foodstore would be the area to the north of the town centre on land occupied by a range of uses including the bus station, telephone exchange and land to the rear.

LEISTON

10.37 It will be necessary to monitor the range of 'Uses' located on the main shopping frontages over the Plan Period. We believe a stronger balance in uses will consolidate the town centres retail function, and ensure that Leiston becomes a more attractive location to potential new retailers. The District Council may wish to consider a policy to monitor and facilitate a range of 'Uses' on the main shop frontages. The aim will be to attract new retailers to the consistently high proportion of vacant units on High Street and Sizewell Road.

10.38 The physical environment in Leiston town centre has been identified in our Retail Study as less diverse than the other town centres in the District, with clear signs of dilapidation and lack of investment. We are aware that enhancement work is now starting on the improvement of the town centre. We recommend, therefore, that Policy AP147 is updated to reflect these enhancements, and to identify further areas where such improvements would be of most benefit to the town centre.

10.39 It will be necessary to monitor car park usage throughout the year, and if necessary, to make active provision for additional car parking during the Local Plan period. Policy AP146 should be updated as part of the Local Plan review to reflect the current position and any amendments since the adopted Local Plan, 2001.

FRAMLINGHAM

10.40 Our assessment of Framlingham identified a vital and viable town centre with an attractive, historic and characteristic town centre. We consider the diversity of uses in the town centre is relatively well balanced with a strong representation of A1 shop uses. The Local Plan review should aim to maintain this good balance and prevent any significant loss of A1 shop use whilst recognising the importance of service uses.

10.41 Policy AP139 allocates land at The Elms for comprehensive redevelopment including additional town centre car parking. This policy should be updated as part of the Local Plan review to reflect any changes. Car parking provision in the town centre should continue to be monitored to assess whether this car parking allocation is sufficient to meet requirements. It may be necessary to make active provision for further car parking during the Local Plan period.

10.42 The physical environment and historic character are significant strengths in Framlingham, and it will be necessary to ensure these positives are protected in the Local Plan review. Policy AP140 protects the setting of Framlingham Castle, and we consider this remains an important policy over the Local Plan period. Policy AP141, which addresses 'Opportunities for Enhancement', should be updated to reflect recent enhancement schemes and to consider any further areas of the town centre that may require environmental enhancement.