

Carter Jonas

2015 Suffolk Coastal Retail Capacity *Refresh*:

FINAL REPORT

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Suffolk Coastal Retail Capacity *Refresh*

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1.0 INTRODUCTION

- 1.1 Carter Jonas has been instructed by Suffolk Coastal District Council to carry out a 'refresh' of the Council's previous evidence-based retail capacity assessments published in 2003, 2008 and 2009¹.
- 1.2 This initial 'refresh' work is required by the Council to ensure that the emerging *Site Allocations and Area Specific Policies DPD* (SAASP) and the *Felixstowe Peninsula Area Action Plan* (FPAAP) provide the necessary sites and development opportunities to meet the identified needs for new retail (convenience and comparison) floorspace in compliance with the NPPF (paragraph 23). This 'refresh' is initially required to help inform the preparation of the Council's *Preferred Options* consultation document scheduled for publication in Autumn 2015.
- 1.3 The 'refresh' takes into account the changes in national and local planning policy and other material considerations since 2008/09; when the *2009 Retail Study Update* was prepared. This includes the *National Planning Policy Framework* (NPPF, March 2012) and *National Planning Practice Guidance* (NPPG, March 2014); both of which set out the Government's key objective of sustainable economic development and, as an important part of this, ensuring the vitality and viability of town centres.
- 1.4 The 'refresh' has been carried out using CJ's **CREAT**[®] Capacity Model and takes into account the impact of the economic recession and the growth in internet shopping on retail expenditure forecasts. The 'refresh' also allows for retail floorspace that has been permitted across the District since the 2009 study; principally new foodstores at Railway Approach (reference: DC/12/2395) and Haven Exchange, Felixstowe (reference: DC/14/2611/FUL), and new retail floorspace at Martlesham Heath (references: DC/14/0266/FUL and DC/13/1215)
- 1.5 As part of this work, the 'refresh' provides very high level advice on the Felixstowe's defined Town Centre boundary, shopping frontages and primary shopping area. It also provides takes account of the retail offer at Martlesham Heath to help inform the Council's treatment of this area in the emerging *SAASP Issues and Options* document² (paragraph 4.12). This area comprises a significant and wide-ranging convenience and comparison goods retail offer (including Martlesham Heath Retail Park), located just south of the A1214 and east of the A12, some 8km to the east of Ipswich and 5km to the west of Woodbridge.

¹ The *2003 Retail Study* was originally prepared by CB Hillier Parker. The *Retail Study Update: Final Report* (December 2008) and the *Addendum to Suffolk Coastal Retail Study* (September 2009) were both prepared by CBRE on behalf of Suffolk Coastal District Council.

² Paragraph 4.12 of the SAASP Issues and Options document identified three possible approaches for the Martlesham Heath area.

- 1.6 However, it should be noted at the outset that this '*refresh*' does not provide a full and comprehensive review and update of the Council's previous retail and town centre studies. For example, this '*refresh*' draws on the results of the Household Telephone Interview Survey (HTIS) conducted to help inform the original *2003 Retail Study*, and it does not therefore reflect the likely changes in shopping patterns, expenditure flows and market shares that will have inevitably occurred over the last decade due, in part, to the impact of new retail investment and development in competing shopping locations and also the growth of internet shopping. We therefore advise Suffolk Coastal District Council that they should update the household survey as a priority.
- 1.7 Notwithstanding this important caveat, this capacity '*refresh*' is based, as far as possible, on most robust and reliable data and forecasts available³, accepted published sources used for retail planning assessments, as well as evidence provided by the local planning authority.
- 1.8 For ease of reference this study is set out in the following sections:
- **Section 2:** describes CJ's **CREAT**^e Capacity Model approach and identifies the key assumptions and forecasts that underpin the model;
 - **Section 3:** describes the key outputs of the capacity forecasts for convenience and comparison goods retailing; and
 - **Section 4:** summarises the key findings of the capacity '*refresh*' and provides high level advice in accordance with the NPPF on the definition of shopping frontages and primary shopping areas, specifically for Felixstowe Town Centre, and an appropriate local impact threshold.

³ This includes the latest forecasts published by Experian in *Retail Planner Briefing Note 12* (October 2014).

2.0 CREATE MODEL: BASELINE EVIDENCE & FORECASTS

- 2.1 This section sets out the baseline assumptions and forecasts that underpin the quantitative need (capacity) assessment for new retail (comparison and convenience goods) floorspace in Suffolk Coastal District over the development plan period. This 'refresh' updates and supersedes the findings of the previous evidence-based studies prepared for the planning authority to help inform plan-making and decision-taking at the local level.

THE CREATE MODEL: APPROACH

- 2.2 As described in Section 1, CJ's *Retail and Town Centre Consultancy* team has developed the **CREAT^e** economic model over a number of years to specifically assess the capacity for, and impact of, new convenience and comparison goods retail floorspace on existing centres, stores and shopping locations.
- 2.3 The Excel-based model adopts a transparent 'step-by-step' goods-based approach in which all the key assumptions and forecasts can be easily interrogated and tested. It has been developed in accordance with best practice, and takes into account the most recent advice and impact 'checklist' set out in the Government's *National Planning Practice Guidance* (NPPG) on 'Ensuring the Vitality of Town Centres' (paragraphs 017-018).
- 2.4 Although it is accepted that retail planning assessments generally rely on a series of informed judgements to assess the likely turnover, trade draw and impact of new developments, one of the main advantages of the 'step-by-step' approach is that it enables the judgements and factors underlying them to be fully explained and tested.
- 2.5 The key steps in the **CREAT^e** retail capacity model are as follows:
- **Step 1:** define an appropriate catchment/study area and, where relevant, subdivide the catchment into zones based on postcode sectors to help facilitate the broad assessment of current shopping patterns and expenditure flows based on survey evidence (where available).
 - **Step 2:** establish the base year, price year and the appropriate timeframe for assessing capacity ('design years') in accordance with advice set out in the NPPF and NPPG.
 - **Stage 3:** establish the broad nature of current shopping patterns and expenditure flows, preferably based on recent household telephone interview surveys, and identify the main existing centres and shopping locations to be assessed.
 - **Step 4:** determine the population and expenditure per capita levels within the catchment area and defined zones to identify the total available retail expenditure at the base year. At this stage an allowance is generally made for *Special Forms*

of Trading (SFT), which includes all non-store sales (i.e. purchases made via the internet, mail order, TV, catalogue shopping, etc.).

- **Step 5:** project forward the likely growth in population and expenditure per capita levels using accepted sources to identify the total available expenditure at the design year(s) for capacity and impact testing.
- **Step 6:** identify the base year '*market shares*' for different types of comparison (non-food) and convenience (food) goods shopping across the catchment and main study zones based on the survey evidence, where available.
- **Step 7:** allocate the available expenditure in the study area and zones based on the (survey-based) market shares to the identified centres, stores and shopping locations at the base year.
- **Step 8:** project forward the expenditure allocated to the main centres, stores and shopping locations over the forecast years based on a standard '*constant market share approach*'.
- **Step 9:** assess the potential '*inflow*' (trade draw) of expenditure from outside the defined study area to the main centres, stores and shopping locations, where relevant, to identify their '*potential*' turnovers. The assessment of '*inflow*' is necessarily based on informed judgements drawing on other evidence-based studies and retail assessments, where available.
- **Step 10:** identify all commitments in the defined catchment/study area (i.e. retail floorspace with planning permission, under construction and/or opened since the baseline survey evidence was conducted). Assess the likely turnover and trade draw of the commitments from within and outside the catchment area.
- **Step 11:** in simple terms the forecast economic capacity for new retail floorspace is broadly derived from the forecast growth in population and expenditure, after making an allowance for new commitments, and the increased '*productivity*' (or '*efficiency*') of all existing and new floorspace.
- **Step 12:** in certain cases additional capacity for new retail floorspace may also arise where there is a clearly identified "*imbalance*" (or "*over-trading*") between the '*benchmark*' turnovers of existing centres, stores and/or shopping locations at the base year, and the total available expenditure in the defined study/catchment area⁴.

⁴ Overtrading normally manifests itself at the local level in terms of pedestrian and car park congestion, long queues at checkouts, congestion in aisles, etc.

THE CREATE MODEL: THE EVIDENCE BASE

- 2.6 The assumptions and forecasts underpinning the **CREAT^e** model are based on robust evidence, research and best practice. For example:
- The 'base year' for the capacity assessment is 2015 and the forecast years for assessing capacity are 2020, 2025, 2027 and 2031.
 - The base year population figures have been sourced from our in-house Experian *MMG3 Geographic Information System* (GIS) MMG3, which is an accepted source for retail planning assessments. Experian's base year populations are derived from the latest ONS 2012-based Sub-National Population Projections.
 - The projections to 2031 are also sourced from the MMG3 GIS and are based on Experian's '*demographic component model*', which takes into account age, gender, birth rates, ageing, net migration and death rates.
 - The average retail (convenience and comparison goods) expenditure per capita levels by zone at the base year have been derived from Experian's MMG3 GIS (please note all expenditure and turnover figures are expressed in 2013 prices).
 - The annual expenditure growth forecasts for convenience and comparison goods are informed by Experian's October 2014 *Retail Planner Briefing Note 12* (RPBN 12)
 - The market shares for 'non-store' retail sales (otherwise referred to as *Special Forms of Trading*, including Internet sales) have been deducted from the expenditure per capita figures at the base year and over the forecast period in accordance with standard practice. The SFT market shares have been sourced from Experian's latest RPBN 12 and are based on data published by the Office for National Statistics (ONS).
 - The increased 'productivity' of existing and committed retail (convenience and comparison goods) floorspace over the forecast period is informed by Experian's *Retail Planner Briefing Note 12.1: Addendum* (October 2014).
- 2.7 The capacity forecasts are intended to enable Suffolk Coastal District Council to assess the broad strategic options for the spatial distribution of new retail-led development over the plan period, and make informed policy choices about where any forecast need should be met in accordance with the advice set out in the NPPF. The allocation of sites to meet any identified need over the next five years and over the lifetime of the development plan will depend on a range of key considerations, including the suitability, viability and availability of sites in or on the edge of existing centres, and the potential to expand existing centres to accommodate the forecast needs.
- 2.8 However it is important to restate at the outset that the capacity forecasts should be treated with caution for a number of reasons. First, in this case, the capacity

assessment is not based on an up-to-date household survey. This will be needed to help identify current shopping patterns and preferences for different types of food and non-food shopping across the District. Second, the longer terms forecasts could be subject to significant change due to the impact of economic, demographic and market trends.

- 2.9 As a result we advise the Council that greater weight should be placed on the short term forecasts carried out over a five year period (see NPPG, para 003). Notwithstanding this, Suffolk Coastal District Council will need to take account of the forecast capacity for new retail floorspace up to 2031 as part of their plan-making. This is because the NPPF (para 23) states that local planning authorities should meet the need for retail and town centre uses in full.

THE STUDY/CATCHMENT AREA

- 2.10 The study/catchment area is the same as defined for the Council's previous evidence-based studies and is reproduced in **Appendix 1** to this study.
- 2.11 It covers the whole of the local authority area and includes areas in neighbouring authorities, principally Halesworth and Southwold to the north. Ipswich town centre is not included within the defined catchment area. The study area has been further broken down into ten zones using postcode sector geography, based on the location of major urban settlements and concentrations of population.
- 2.12 The shopping patterns, retail expenditure flows and market share assessments for both convenience and comparison goods retailing that underpin the **CREAT^e** model approach have been informed by a telephone interview survey of 1,000 households conducted to inform the preparation of the original *2003 Retail Study*.

POPULATION AND EXPENDITURE FORECASTS

Population Projections

- 2.13 Table 1 (**Appendix 2**) sets out the base year population for the study area and ten study zones. It shows that there are estimated to be some 135,845 people living in the defined study area at 2015. Zone 1 (Felixstowe) has the highest population of 28,812 and Zone 9 (Framlingham) has the lowest population figure of 6,437, which reflects the rural nature of this zone.
- 2.14 As described previously, the population projections have been sourced from CJ's in-house Experian-based MMG3 GIS demographic model. Experian's projections show a total population growth of +6.8% (+9,379) across the Study Area to 144,224 by 2031.
- 2.15 It should be noted that Experian's population projections may not necessarily include all the potential population growth that could arise from the Council's policy-led housing allocations. Although the capacity forecasts may therefore slightly

underestimate the potential for new retail (convenience and comparison goods) floorspace over the forecast period, experience shows that this will not have a significant impact on the overall District-wide capacity forecasts unless the planned housing allocations and resultant population growth are substantial.

Expenditure per Capita Levels

- 2.16 Tables 2 and 3 (**Appendix 2**) set out the average expenditure per capita estimates by zone for convenience and comparison goods respectively in 2015. As described above, the 2015 average expenditure per capita figures have been derived from our in-house Experian MMG3 GIS.

Special Forms of Trading (SFT)

- 2.17 In accordance with good practice an allowance has been made for the market share of *Special Forms of Trading* (SFT)⁵ at the base year and over the forecast period.
- 2.18 Based on ONS data, Experian Business Strategies (EBS) estimate that the current (2014) value of internet sales is £37.2bn (current prices) and other (non-internet) SFT sales stand at approximately £8.3bn. This results in total SFT sales of £45.5bn in 2013, which represents a circa 165% increase from £17.1bn recorded in 2006. Overall the market share of SFT as a proportion of total retail sales has increased from 5.6% in 2006 to 13% in 2014. This significant growth has been fuelled by internet shopping, which had increased its share of total retail sales from 4.7% in 2008 to 10.6% in mid-2014.
- 2.19 Up to now, the impact of Internet shopping has been mainly concentrated on certain retail products and services (such as, for example, electrical goods, books, music and travel). In turn, this has resulted in a reduction in the number of retailers selling these types of products and services on the high street. However this does not mean that other comparison goods categories are immune to the impact of the internet, including clothing and footwear.
- 2.20 The table below sets out Experian's latest forecasts of the growth in the total market share of SFT between 2015 and 2031, based on retail spending growth assumptions and predictions as to the future take-up and expansion of internet shopping⁶.

Table 2.1 Forecast growth in SFT's (%) market share of total retail sales

	2015	2020	2025	2027	2031
Convenience Goods	9.4	13.5	16.3	17.0	18.5
Comparison Goods	16.6	21.0	21.2	21.1	20.7

Source: Experian Retail Planner Briefing Note 12 (October 2014), Appendix 3

⁵ SFT comprises non-store sales via the internet, mail order, stalls and markets, door-to-door and telephone sales.

⁶ Please note that although no official data is available for convenience and comparison goods, EBS have provided their own market share estimates.

- 2.21 EBS forecast that non-store retailing will continue to grow rapidly over the short to medium term, outpacing traditional forms of retail spending. They predict that this growth will be sustained by new technology (such as browsing and purchasing through mobile phones and tablets) and the development of interactive TV shopping, but will slow after 2021.
- 2.22 However such forecasts need to be treated with caution, as according to Experian approximately 25% of all SFT sales for comparison goods and some 70% for convenience goods are still sourced through traditional ('bricks-and-mortar') retail space, rather than from 'virtual' stores and/or distribution warehouses. On this basis Experian has adjusted the SFT market shares to reflect the proportion of internet sales sourced from existing stores.

Table 2.2 Adjusted forecast growth in SFT's market share of total retail sales

	2015	2020	2025	2027	2031
Convenience Goods	2.8	4.0	4.9	5.1	5.6
Comparison Goods	11.7	15.7	15.9	15.8	15.5

Source: Experian Retail Planner Briefing Note 12 (October 2014), Appendix 3

- 2.23 We have used the adjusted SFT market shares set out in Experian's RPBN 12 for the purpose of this 2015 retail capacity 'refresh'.

Expenditure Per Capita Growth Forecasts

- 2.24 Following an unprecedented period of growth in consumer spending since the mid-1990s, the onset of the economic recession in 2007/08 had a dramatic impact on consumer spending and market demand. Business and consumer confidence was further weakened by public sector cuts, the rise in VAT, increasing unemployment, less expansionary consumer credit and the rising cost of living (including higher energy costs, petrol and housing prices).
- 2.25 The predicted growth in average convenience and comparison expenditure per capita levels up to 2031 assumed for the purpose of the retail capacity assessment has been informed by the forecasts set out in Experian's latest *Briefing Note 12* (October 2012).

Table 2.3 Forecast year-on-year (%) growth in retail expenditure per capita

Volume Growth per head (%):	2013	2014	2015	2016	2017-2020	2021	2022-2031
Convenience Goods	-0.5	0.5	0.4	0.6	0.6	0.6	0.6
Comparison Goods	4.6	5.6	4.4	3.1	3.1	3.1	3.3

Source: Experian Retail Planner Briefing Note 12 (October 2014); Figures 1a and 1b.

- 2.26 For convenience goods Experian forecast positive growth of +0.6% per annum on average from 2016 onwards. This is above previous historic long term trends of around +0.2% per annum.

2.27 For comparison goods Experian forecast that annual growth rates will average +3.1% per annum for the period 2016 to 2021, and will increase to +3.3% per annum thereafter. It should be noted that this forecast growth is well below historic 'ultra-long' (1973-2013) and 'medium' (1993-2013) term trends of between 4.5% and 5.9% per annum.

2.28 In summary, although there are positive signs of improvement in the UK economy and retail sales in 2014/15, it is clear that consumer/business confidence and the retail sector remain highly vulnerable to changes in the UK economy (such as, for example, the predicted rise in interest rates from 2016 onwards). As Experian explain in RPN12, the lower forecast growth over the longer term compared with historic trends reflects a number of key drivers, including less expansionary consumer credit, slower overall economic growth and an ageing population.

Total Available Expenditure

2.29 Tables 4 and 5 (Appendix 1) set out the total growth in convenience and comparison goods retail expenditure in the study area and ten zones⁷. The forecasts show:

- a +14.1% (+£42.44m) growth in total **convenience goods** expenditure, from £301.7m in 2015 to £344.15m by 2031; and
- a substantially higher +71.6% (+£322.12m) growth in **comparison goods** expenditure, from £449.74m in 2015 to £771.85m by 2031.

2.30 The growth in comparison goods expenditure significantly outstrips convenience goods spend up to 2031, which effectively means that there should be greater potential capacity for new comparison goods floorspace; although this will depend on the number, location and scale of new commitments in the study area.

MARKET SHARE ANALYSIS

2.31 Table 1 sets out the baseline (%) market share analysis for all convenience goods (**Appendix 3**) and comparison goods (**Appendix 4**) shopping purchases across the study area and ten zones at 2015⁸. For convenience and comparison goods the baseline market shares show:

- **Felixstowe Town Centre** is achieving the highest market share of all the District's main centres for both convenience (10.5%) and comparison goods (11.2%) shopping.

⁷ The total available retail expenditure is derived by multiplying the population (Table 1) and average expenditure per capita (Table 2 and 3) levels together.

⁸ As stated previously, in the absence of a more up-to-date evidence base, the market shares have been derived from the household survey originally conducted to inform the 2003 Retail Study. For the purpose of this assessment it has therefore necessarily been assumed that there have been no significant changes in the market share patterns for both convenience and comparison goods retailing since the original survey was conducted.

- The Morrisons at **Cavendish Park District Centre** is estimated to have a market share of 6.1% for convenience shopping.
- **Woodbridge Town Centre** also has a relatively strong market share for both convenience (6.0%) and comparison (9.4%) goods retailing.
- **Saxmundham Town Centre** is achieving a higher market share for convenience goods retailing (7.0%) than for comparison goods (1.3%).
- **Woodbridge, Aldeburgh, Leiston and Framlingham** have lower market shares for both convenience and comparison goods retailing. This reflects their principal roles and functions in the District's network and hierarchy of centres, predominantly serving the more frequent day-to-day needs of their local catchment populations.
- The strong attraction and influence of the food and non-food stores on the eastern fringe of Ipswich, including **Martlesham Heath**, is highlighted by the fact that the retail floorspace in the area is achieving a 35.7% market share of convenience goods retailing in the defined study area and a 12.7% share of comparison goods retailing.

- 2.32 Given that the market shares are based on the household survey carried out to inform the 2003 retail study we advise the Council that the market shares of stores and shopping locations on 'Ipswich's Eastern Fringe' will have increased over the last decade. This will reflect the relative scale, nature and format of new and extended retail floorspace opened over this period, including M&S Simply Food and other retailers at Martlesham Heath Retail Park and the surrounding areas, the redevelopment and extension of the Tesco store at Martlesham, and the new John Lewis at Home and Waitrose store at Futura Park, Ransomes Way. The impact of this new retail floorspace will be to increase the 'leakage' of shoppers and expenditure from the District's main centres, including from Woodbridge and Felixstowe Town Centres. However we cannot measure the impact of this new floorspace on market shares and retention levels without carrying out a new household telephone interview survey.
- 2.33 Having identified the (%) market shares for the District's main centres and stores, the next key step in the capacity assessment involves allocating the '*baseline*' (2015) convenience and comparison expenditure (£ million) within the Study Area and zones to the identified centres, stores and floorspace.
- 2.34 The current trading performance of the main centres and stores is set out in Table 2 for convenience (**Appendix 3**) and comparison (**Appendix 4**) goods retailing. It should be noted that no allowance is made at this stage for the potential "*inflow*" (trade draw) of expenditure to centres and stores from outside the defined Study Area.
- 2.35 For both convenience goods (**Appendix 3**) and comparison goods (**Appendix 4**) the expenditure (£ million) allocated to the main centres and stores at 2020 (Table 3),

2025 (Table 4), 2027 (Table 5) and 2031 (Table 6) assume no changes in market shares over the forecast period.

- 2.36 This '*constant market share approach*' is widely used and accepted for strategic retail assessments. However, the Council will be aware that it is a highly theoretical approach as it does not, for example, take account of the potential impact of new retail investment and development (both within and outside the District) on existing shopping patterns and market shares over time.

'INFLOW' AND BASE YEAR TURNOVER ESTIMATES

- 2.37 In order to provide a complete picture of the current trading (turnover) performance of the main centres and stores in Suffolk Coastal District we have necessarily made informed judgements with regard to the likely 'inflow' (trade draw) from outside the Study Area (see Table 7, **Appendix 3 and 4**).
- 2.38 In the absence of detailed published turnover and trade draw information at the local level, our judgements have been informed by previous studies and retail assessments, as well as the survey and health check evidence. The '*inflow*' assumptions also take account of:
- the scale, offer and location of all existing centres and stores in the District;
 - the likely extent of their catchment areas;
 - the competition from centres, stores and shopping facilities outside the District and the wider Study Area; and
 - the likely retail expenditure derived from people who live outside the Study Area (including visitors and commuters) to main centres and stores in the District.
- 2.39 Although the assessment of 'inflow' is not a straightforward exercise, due to the complex nature of overlapping catchments and shopping patterns, it is reasonable to assume that the main town centres do, to vary degrees, draw a certain proportion of their shoppers and trade from outside the defined Study Area. This partly reflects their roles as tourist and visitor destinations.

RETAIL COMMITMENTS

- 2.40 Suffolk Coastal District Council has identified the following retail schemes that have either opened, are under construction or currently have planning permission:

Railway Approach, Felixstowe (C/12/2395)

- 2.41 Permission was granted by Suffolk District Council in December 2013 (reference C12/2395) for the redevelopment of the former railway sidings and nursery land off Railway Approach and High Road West for a new (Class A1) foodstore with a gross

internal area (GIA) of 5,725m² and a net sales area of 2,908m². The permitted scheme is hereafter referred to as '*Railway Approach*'.

- 2.42 The proposed store will be at first floor level, over car parking. The main entrance will be at ground floor, with access to the sales area via a travelator. Of the total sales area some 70% (2,036m² net) is to be set aside for convenience goods retailing, with the remaining 30% (872m² net) for comparison goods.
- 2.43 However, at the time of writing, the permitted scheme is subject to a High Court challenge from the East of England Co-operative Society. The Co-Op is contending that part of the land granted permission is the subject of a restrictive covenant preventing its development for that purpose. At the time of writing the High Court case was not due to start until Autumn 2015 and there was no operator signed up. As we describe below, planning permission has also recently been granted for a second new foodstore to be operated by Asda on an out-of-centre site known as Haven Exchange. Although we question whether a foodstore at Railway Approach is viable and will be delivered as planned, it nevertheless has planning permission and has therefore been treated as a commitment for the purpose of this retail capacity assessment.
- 2.44 **Appendix 5** sets out our forecasts of the likely convenience and comparison goods turnover of the proposed store based on assumptions as to the likely average sales density of the end user. Our forecasts show that the store could achieve a total convenience turnover of £22.9m in 2020 and a comparison goods turnover of £6.9m.

Haven Exchange, Felixstowe (DC/14/2611/FUL)

- 2.45 The permitted foodstore at Railway Approach was considered by Suffolk Coastal District Council alongside two other foodstore applications in out-of-centre locations.
- **Walton Green:** The first application by Trinity College Cambridge and Tesco Stores Limited (reference C13/0058 and C13/0059) was submitted in January 2013 for a mixed residential, retail, commercial and community development on land north of Walton District Centre. The Class A1 foodstore comprised a gross external floorspace of 4,997m², with a proposed retail sales area of 2,788m², of which 2,323m² was for convenience goods sales.
 - **Haven Exchange:** The second application by Cranford (Felixstowe) Limited (reference C13/0485) submitted in March 2013 was for the redevelopment of the site at Haven Exchange South, Walton Avenue, for a (Class A1) foodstore, petrol filling station (PFS), 180 car parking spaces and servicing. The foodstore (Class A1) comprised a gross internal area of 2,750m². Asda was identified in June 2013 as the preferred operator and the store's total sales area of 1,892m², comprised 1,324m² of convenience retailing and 568m² (30%) of comparison goods.
- 2.46 At Committee, the two out-of-centre foodstore applications were refused planning permission in favour of the sequentially preferable edge of centre store at Railway

Approach. It was also determined that the two out-of-centre stores would have a significant adverse impact on the town centre and planned investment, contrary to the NPPF and policies SP9/SP21 of the *Suffolk Coastal District Local Plan - Core Strategy and Development Management Policies Development Plan Document* (July 2013).

- 2.47 Subsequent to this, Cranford Developments submitted a revised application for an Asda foodstore with a maximum sales area of 1,863m² net, of which 1,211m² is for convenience sales and 652m² for comparison goods. Although the Officer's report recommended refusal of the Asda as previously determined, as advised by Counsel, the application was permitted at Committee and the decision was issued on 1st May 2015. It was concluded by Members that the probability was that the Railway Approach scheme would not be started within the three years of its existing consent.
- 2.48 We forecast store could achieve a total convenience turnover of £14.8m in 2020 and a comparison goods turnover of £5.8m (**Appendix 5**).

Ipswich Eastern Fringe

- 2.49 There are a number of permissions for, and recent developments of new retail floorspace at the eastern fringe of Ipswich since the 2009 retail capacity study was carried out for the Council. This area includes Martlesham Heath Retail Park, which is the main focus for comparison goods retailing and comprises a group of large retail warehouses located just south of the A1214 and east of the A12, some 8km to the east of Ipswich and 5km to the west of Woodbridge. Immediately to the north, across Anson Road, there is a large Tesco supermarket.
- 2.50 The Council has identified the following key commitments at Martlesham Heath Retail Park that we have necessarily reviewed and assessed for the purpose of this retail capacity 'refresh':
- Permission was granted in September 2013 for two Class A1 ('bulky goods') retail units of 2,787m², together with an external trade area of 570m² and associated car parking (**C/13/1215**)⁹. The permission was for one building of 1,626m² and a second building of 1,161m², allowing for subdivision into two units of 464m² and 697m² respectively. We understand that M&S Simply Food (opened April 2013) and Brantano are trading from the permitted units.
 - A minor application for external alterations to Unit 7 on the retail park was also approved, but as far as we understand it will not result in a significant change to the overall park's Class A1 retail floorspace (**DC/14/0266/FUL**).

⁹ Condition 13 of the permission states that the premises (Unit A and B) shall only be used for the sale of bulky comparison goods consisting of building and DIY products, garden products and plants; pets and pet supplies; furniture, carpets, floor coverings, household textiles and soft furnishings; electrical and gas products; vehicle accessories and parts; bicycles and cycle accessories; office furniture and equipment; caravans, tents, camping and boating equipment; and any other goods which are ancillary and related to the main range provided always that such ancillary goods do not occupy more than 10% of the floor space herein approved.

- 2.51 Although located outside Suffolk Coastal District in Ipswich Borough, the opening of the John Lewis at Home and Waitrose store at Futura Park (on the site of the former Crane engineering plant) in November 2012 will also have impacted on shopping patterns and expenditure flows across the study area, and principally in Zones 1-4. The Waitrose store has a net sales area of 2,100m² net and the John Lewis at Home store trades from 3,800m² net in a single building served by over 400 parking spaces.

SUMMARY

- 2.52 In summary, the latest forecasts produced by Experian show a much lower year-on-year growth in comparison and convenience goods expenditure than tested by the Council's previous retail capacity studies. The growth in expenditure available to support the capacity for new retail floorspace will also be dampened by the high and growing market share of Special Forms of Trading over the forecast period, and principally the growth in internet shopping; as well as the significant pipeline commitments for new convenience and comparison goods floorspace in the District, focussed on Felixstowe (Zone 1) and the 'Eastern Fringe' of Ipswich's urban area.

3.0 CREATE MODEL: RETAIL CAPACITY FORECASTS

- 3.1 Drawing on the key evidence, assumptions and forecasts described in Section 2, this section set out the key outputs and findings of the retail capacity '*refresh*'. The detailed capacity tabulations for convenience and comparison goods are provided in Appendix 6 and 7 respectively.

'EQUILBRIUM' APPROACH & 'PRODUCTIVITY' GROWTH

- 3.2 As explained in Section 2, it has necessarily been assumed for the purpose of this capacity '*refresh*' that the District's convenience and comparison goods retail market is in '*equilibrium*' at the base year. In other words we assume that the existing centres and stores are broadly trading in line with their baseline '*benchmark*' turnover levels. This judgement is generally supported by the evidence which does not demonstrate, categorically, that any of the District's existing centres and stores are '*overtrading*' to any significant degree¹⁰. The '*equilibrium*' approach is also preferred as it allows for existing centres and stores to recover trading levels and maintain their viability in the immediate post recessionary period.
- 3.3 On this basis any residual expenditure available to support new retail floorspace within the Study Area over the development plan period will be a function of the difference between the forecast growth in '**potential**' turnover levels derived from the survey-derived market share analysis and '*inflow*' assumptions; and the growth in '**benchmark**' turnovers based on applying robust year-on-year '*productivity*' growth rates to all existing and new retail floorspace.
- 3.4 In simple terms, floorspace '**productivity**' (or turnover '*efficiency*') growth represents the ability of retailers to absorb higher than inflation increases in their costs year-on-year (such as rents, rates and service charges) to help maintain their profitability and viability. In this case the turnover '*productivity*' growth rates have been informed by the latest forecasts in Experian's latest *Retail Planner Briefing Note 12* (October 2014) as summarised in the table below. These growth rates are based on predicted changes in retail floorspace over time and make an allowance for non-store retailing.

Table 3.1 Forecast '*productivity*' growth rates

	2013	2014	2015	2016	2017-2020	2021	2022-2031
Convenience Goods:	-1.8	-1.4	-0.3	-0.4	-0.2	-0.2	0.1
Comparison Goods:	4.3	5.3	3.8	2.3	2.0	2.0	2.2

Source: Experian Retail Planner Briefing Note 12 Addendum (October 2014), Figures 4a and 4b.

¹⁰ Overtrading normally manifests itself at the local level in terms of pedestrian and car park congestion, long queues at checkouts, congestion in aisles, etc.

- 3.5 The forecasts show that the scope for sales density growth is very limited for convenience goods retailing, and this is mainly explained by the slow growth in sales volumes and limited additions to the floorspace stock. For comparison goods retailing, Experian state that the trends towards more modern, higher density stores and the demolition of older inefficient space will help to sustain average growth rates of over +2.0% per annum over the next two decades. However, this is still well below the rate seen during the boom of the early years of this century. It should also be noted that individual centres, stores and shopping facilities will be capable of achieving higher and/or lower annual 'productivity' growth depending on a range of trading factors (including the size, quality and type of retail floorspace).
- 3.6 As stated above, the application of a turnover 'efficiency' growth rate is a standard approach used for retail planning capacity and impact assessments, and has been used to inform our 2015 retail capacity '*refresh*'.

CONVENIENCE GOODS CAPACITY

- 3.7 Table 1 (**Appendix 6**) sets out and explains the key steps underpinning the '*global*' convenience goods capacity assessment for Suffolk Coastal District. The residual expenditure and floorspace capacity forecasts are summarised below:

Table 3.2 Suffolk Coastal District – 'Global' Convenience Goods Capacity

	2020	2025	2027	2031
Residual Expenditure (£m):	-£28.3	-£14.1	-£8.5	£2.8
FLOORSPACE CAPACITY (m² net):				
Superstore Format:	-2,384	-1,189	-711	230
Supermarket/Discounter Format:	-4,088	-2,039	-1,218	395

Source: Table 1, Appendix 6

- 3.8 In order to convert the residual expenditure into a net sales figure we have assumed that new '*superstore format*' floorspace will be occupied by a '*top 6*' grocer (i.e. Tesco, Sainsbury's, Asda, Morrisons, Waitrose and Marks & Spencer) and will achieve an average sales density of circa £12,000 per m² in 2015 (2013 prices).
- 3.9 After taking into account the commitments for new foodstores at Railway Approach (no named operator) and Haven Exchange (Asda) in Felixstowe, the forecasts show that there is no forecast capacity in Suffolk District until the end of the forecast period (230m² net by 2031).
- 3.10 Alternatively, assuming the residual expenditure capacity is taken up by a supermarket (e.g. Co-Op, Budgens, etc.) and/or 'deep discount' retailer (e.g. Aldi, Lidl, Netto, etc.) trading at lower average sales levels of approximately £7,000 per m² in 2015, then there is slightly higher forecast capacity for 395m² net of new convenience floorspace by 2031.

- 3.11 To further help inform the Council's assessment of the potential scale and optimum location for new retail (convenience and comparison goods) floorspace in the District, we have also carried out a more refined ('centre-by-centre') capacity assessment.
- 3.12 However, it should be noted at the outset that any forecast floorspace capacity identified for a specific centre/area does not necessarily mean that all the retail floorspace can and/or should be provided within that centre per se. For example, there may be a lack of suitable and viable sites available in some centres, or there may be other policy, heritage, transport and physical constraints to development. Alternatively it may be more appropriate to locate the floorspace capacity in one centre over another to encourage more sustainable travel patterns and/or help to achieve specific policy, regeneration and/or investment objectives.
- 3.13 If sufficient town centre and/or edge of centre sites are not available to meet the forecast capacity over the development plan period, then local planning authorities are required by the NPPF (paragraph 23) to set policies for meeting the identified needs in other accessible and sustainable (out of centre) locations that are well connected to the town centre and are capable of generating benefits for the centre's overall vitality and viability, such as through linked pedestrian trips and increased footfall.
- 3.14 Against this background, Tables 2-8 (**Appendix 6**) disaggregate the '*global*' capacity for the main centres and stores in Suffolk District assuming '*equilibrium*' and the '*constant market share*' approach. The results are summarised in Table 9 (Appendix 6) and below.

Table 3.3 Suffolk Coastal District – Convenience Goods Capacity

	2020	2025	2027	2031
Felixstowe TC (including Cavendish Park DC)	-2,953	-2,737	-2,653	-2,481
Woodbridge Town Centre	77	148	177	233
Aldeburgh Town Centre	9	18	21	28
Saxmundham Town Centre	85	164	196	256
Leiston Town Centre	51	99	118	156
Framlingham Town Centre	48	91	108	142
Ipswich Eastern Fringe	299	1,028	1,322	1,896
TOTAL DISTRICT-WIDE CAPACITY:	-2,384	-1,189	-711	230

Source: Tables 2-9, Appendix 6.

- 3.15 The table shows that there is no forecast quantitative capacity for new convenience goods floorspace in Felixstowe Town Centre or Cavendish Park District Centre (i.e. Morrisons) over the forecast period due to the impact of the new planned foodstores at Railway Approach and Haven Exchange.
- 3.16 Across the District's other smaller centres the forecast capacity ranges from 28m² net for Aldeburgh Town Centre, up to 256m² in Saxmundham Town Centre by 2031. This

reflects the smaller size, role and function of the food and convenience offer in these centres, and the fact that they predominantly serve the more frequent '*day-to-day*' needs of their local catchment populations, as well as tourists and visitors. The scale of new floorspace identified for each centre could potentially support modest extensions to existing foodstores, where possible, or the provision of new smaller ('top-up') convenience store formats (such as, for example, Tesco Express, Sainsbury's Local, Little Waitrose, etc.).

- 3.17 The relative scale, attraction, market share and trading performance of the large superstores on Ipswich's Eastern Fringe is reflected by the fact that they are generating a much higher capacity for new convenience goods floorspace over the forecast period. Our forecasts show capacity for 299m² net of new (superstore format) floorspace in 2020, increasing to 1,896m² by 2031. This would be sufficient to support one new superstore, or possibly two discount stores, or possibly extensions to existing stores in the Eastern Fringe.
- 3.18 However any forecast capacity generated by the District's out-of-centre retailing should be directed to the District's town centres first. This is in accordance with national and local plan policy, and specifically the sequential approach that seeks to promote new development and investment in town centres ahead of edge and out-of-centre locations. However meeting this forecast need in full over the lifetime of the development plan period will depend on whether there are any suitable and viable sites in or on the edge of the District's main centres that are capable of accommodating a larger quantum of convenience goods floorspace; and whether these sites are currently available and/or will become available over the lifetime of the development plan. In the case of the (convenience and comparison goods) retail floorspace on Ipswich's Eastern Fringe, the search for potential sites would also extend to Ipswich Town Centre and other centres in Ipswich Borough that fall within the catchment areas of the Eastern Fringe foodstores and shopping locations.

COMPARISON GOODS CAPACITY

- 3.19 Table 1 (**Appendix 7**) sets out the detailed steps in the comparison goods capacity assessment. The results are summarised below.

Table 3.4 Suffolk Coastal District – 'Global' Comparison Goods Capacity

	2020	2025	2027	2031
Residual Expenditure (£m):	-£6.2	£15.5	£26.1	£38.2
FLOORSPACE CAPACITY (m² net):	-1,120	2,509	4,049	5,441

Source: Table 1, Appendix 7 (Steps 5 & 6)

- 3.20 As the table shows, there is no District-wide capacity for new retail floorspace in 2020 after taking into account all new commitments. There is capacity for 2,509m² net of new comparison goods floorspace in 2025, increase to 5,441m² net by 2031.

- 3.21 The forecast residual expenditure capacity has been converted into a net retail sales area based on an assumed average sales density for all new non-food floorspace of circa £5,000 per m² at 2015. This is broadly equivalent to an average sales density for retail units in prime shopping locations. However, average sales levels will inevitably vary between different locations, different formats, and different operators¹¹. Where this is the case it will have implications for assessing the capacity for, and impact of new retail floorspace. The local planning authority will therefore need to take this into account when assessing and determining applications for different operators and different types of retail floorspace in different locations (such as, for example, 'bulky goods' retail warehousing).
- 3.22 The 'global' capacity has been allocated between the main centres, local centres, villages and other shopping locations in Suffolk Coastal District based on their relative trading performance and market shares at the base year (Tables 2-8, **Appendix 6**). The results are summarised in Table 9 (Appendix 6) and below.

Table 3.5 Suffolk Coastal District's Centres – Comparison Goods Capacity

	2020	2025	2027	2031
Felixstowe Town Centre	-1,905	-984	-631	-239
Woodbridge Town Centre	302	1,012	1,326	1,587
Aldeburgh Town Centre	16	54	71	85
Saxmundham Town Centre	38	135	178	212
Leiston Town Centre	53	180	235	282
Framlingham Town Centre	33	108	141	169
Ipswich Eastern Fringe	342	2,005	2,729	3,346
TOTAL DISTRICT-WIDE CAPACITY:	-1,120	2,509	4,049	5,441

Source: Table 12-15, Appendix 7

- 3.23 The forecasts show no capacity for new floorspace in Felixstowe Town Centre up to 2031 due to the impact of the comparison goods floorspace proposed as part of the two foodstore commitments at Railway Approach and Haven Exchange.
- 3.24 There is stronger capacity for new comparison goods floorspace in Woodbridge Town Centre of 302m² net in 2020, increasing to 1,587m² net by 2031.
- 3.25 As for convenience goods retailing, there is more limited capacity for new floorspace in Aldeburgh (85m² net), Saxmundham (212m²), Leiston (282m² net) and Framlingham (169m² net) Town Centres due to their more limited comparison goods offer, role and function within the Districts' network and hierarchy of centres.

¹¹ This includes the type of goods sold by the retailer, the location and quality of the retail floorspace, and the size and affluence of the catchment population. For example, published trading figures show that 'bulky goods' retailers in the DIY, carpet and furniture sectors generally achieve lower average sales levels of between £1,500 and £4,000 per m², whereas large format electrical goods retailers can achieve much higher average sales levels of £7,000 per m² and above.

- 3.26 The out-of-centre retail warehouses and parks at Ipswich's Eastern Fringe, but located within the District area, are generating capacity for 342m² net of new comparison goods retailing in 2020, increasing to 3,346m² net by 2031. As for convenience goods retailing, this capacity should be directed to town centres first, in accordance with national and local plan policy. This will be subject to the identification and allocation of suitable and commercially viable sites either in or on the edge of town centres (principally Ipswich Town Centre in this case) that are capable of accommodating the identified need in full over the lifetime of the development plan.

SUMMARY

- 3.27 In summary the retail capacity refresh shows the following 'global' capacity for new comparison and convenience goods retail in Suffolk Coastal District over the forecast period.

Table 3.6 Suffolk Coastal District – 'Global' Capacity Forecasts (m² net)

	2020	2025	2027	2031
Convenience Capacity:	-2,384	-1,189	-711	230
Comparison Capacity:	-1,120	2,509	4,049	5,441
TOTAL:	-3,504	1,320	3,338	5,671

Source: Table 8, Appendices 6 & 7 (Step 6)

- 3.28 As the table shows, there is no forecast capacity for new retail floorspace at 2020 due to the impact of new development and commitments in the District; principally the permissions for two new foodstores at Railway Approach, on the edge of Felixstowe Town Centre, and Haven Exchange in an out-of-centre location. The total forecast capacity increases to 3,338m² net by 2027 and 5,671m² net by 2031.

4.0 SUMMARY AND CONCLUSIONS

- 4.1 Carter Jonas was instructed by Suffolk Coastal District Council in July 2015 to carry out a 'refresh' of the Council's previous evidence-based retail capacity studies published in 2003, 2008 and 2009¹².
- 4.2 This 'refresh' takes into account the changes in the base year assumptions and growth forecasts post-recession, and has been prepared in accordance with national planning policy and guidance. This includes the *National Planning Policy Framework* (NPPF, March 2012) and *National Planning Practice Guidance* (NPPG, March 2014); both of which set out the Government's key objective of sustainable economic development and, as an important part of this, ensuring the vitality and viability of town centres.
- 4.3 We understand that this initial 'refresh' work is required by the Council to ensure that the emerging *Site Allocations and Area Specific Policies DPD* (SAASP) and the *Felixstowe Peninsula Area Action Plan* (FPAAP) provide the necessary sites and development opportunities to meet the identified needs for new retail (convenience and comparison) floorspace in compliance with the NPPF (paragraph 23). This 'refresh' will initially help inform the preparation of the Council's *Preferred Options* consultation document scheduled for publication in Autumn 2015.
- 4.4 In addition to this, the 'refresh' is intended to provide initial high level advice on:
- the suitability and/or broad extent of existing Town Centre boundaries and primary shopping frontages to ensure they are still 'fit for purpose'; and
 - a suitable locally set impact threshold in line with the NPPF (paragraph 26), otherwise the default threshold for requiring an impact assessment will be 2,500m² gross;
- 4.5 However, it should be noted that Carter Jonas was not instructed by the Council as part of this work to:
- update the town centre health checks which formed part of the *2008 Retail Study Update*;
 - update the household telephone interview survey conducted for the *2003 Retail Study*;
 - carry out a detailed sequential assessment of potential opportunity sites to accommodate any identified need for new retail floorspace.
- 4.6 Given that the household survey upon which the analysis of shopping patterns, expenditure flows and market shares is based is now some 12 years old, we strongly advise the Council that they should commission a new survey as a priority. An updated

¹² The 2003 Retail Study was originally prepared by CB Hillier Parker. The Retail Study Update: Final Report (December 2008) and the Addendum to Suffolk Coastal Retail Study (September 2009) were both prepared by CBRE on behalf of Suffolk Coastal District Council.

health check for the main centres would also help to inform a more detail review and definition of the main Town Centre boundary and primary/secondary shopping frontages.

- 4.7 On this matter we note that the Council is committed to a full review of the Core Strategy alongside neighbouring authorities with a view to align evidence base documents. As part of this Suffolk Coastal District Council has confirmed that they intend to carry out a comprehensive cross boundary Retail Study to provide an overview of retail needs across the District and neighbouring authorities.

RETAIL CAPACITY 'REFRESH'

- 4.8 The retail capacity 'refresh' has identified no district-wide capacity for new retail (convenience and comparison goods) floorspace at 2020. There is forecast capacity for 1,320m² net of new retail floorspace by 2025¹³, increasing to 5,671m² net by 2031¹⁴.

- 4.9 It should be noted that the revised forecasts are significantly lower than previously identified by the Council's *2009 Retail Study Addendum*, which forecast capacity for 4,384m² net of new convenience goods floorspace in 2025 and 25,799m² net of comparison goods sales. The compares with our revised 2025 forecasts that show no capacity for convenience goods floorspace and 2,509m² for comparison goods floorspace. There are a number of explanations for the significant changes in floorspace capacity since the *2009 Retail Study Addendum*, including:

- the impact of the economic recession, which has significantly reduced retail expenditure per capita levels and year-on-year growth in retail (convenience and comparison goods) expenditure;
- the impact of new development and planned commitments on forecast capacity, principally Railway Approach and Haven Exchange;
- the significant forecast increase in the market share of Special Forms of Trading due to the growth in internet shopping; and
- a lower floorspace 'productivity' growth rate for existing and new comparison goods floorspace;

- 4.10 The differences between the *2009 Retail Study Addendum* and the 2015 'refresh' capacity forecasts are further illustrated by the table below for the main centres and shopping locations in the District at 2025.

¹³ 2025: comprising 2,509m² net of comparison goods sales, but negative capacity for convenience goods retailing of - 1,1891m² net

¹⁴ 2031: comprising 5,441m² net of comparison goods sales and 230m² net of convenience goods floorspace.

Table 4.1 Suffolk Coastal District – 2025 Retail Capacity Forecasts (m² net)

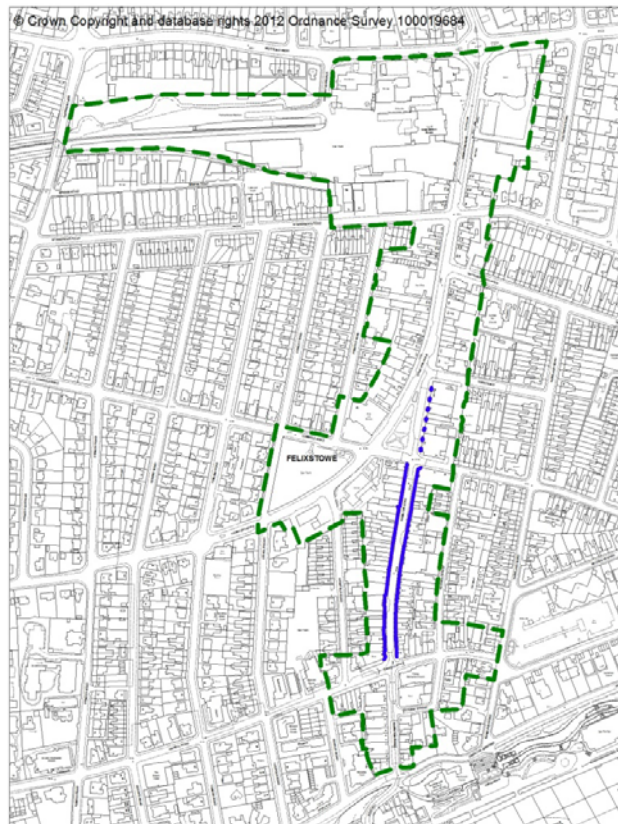
	Comparison Goods		Convenience Goods	
	2009 Update	2015 'Refresh'	2009 Update	2015 'Refresh'
Felixstowe Town Centre	10,733	-984	1,374	-2,737
Woodbridge Town Centre	9,193	1,012	840	148
Aldeburgh Town Centre	647	54	-66	18
Saxmundham Town Centre	1,663	135	1,024	164
Leiston Town Centre	2,378	180	893	99
Framlingham Town Centre	1,185	108	319	91
Ipswich Eastern Fringe	-	2,005	-	1,028
TOTAL DISTRICT-WIDE CAPACITY:	25,799	2,509	4,384	-1,189

Sources: 2009 Update (Appendix 2) and 2015 'Refresh' (Appendices 6 and 7)

- 4.11 We consider the implications of these revised capacity forecasts in more detail below.

SHOPPING FRONTAGES & PRIMARY SHOPPING AREA DEFINITIONS

- 4.12 The NPPF (Annex 2) defines **Primary Frontages** as likely to include a high proportion of retail uses (which may include food, drinks, clothing and household goods), whereas **Secondary Frontages** provide greater opportunities for a diversity of uses (such as restaurants, cinemas and businesses).
- 4.13 The **Primary Shopping Area** (PSA) is defined by the NPPF as the area where retail development is concentrated and generally comprises the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage.
- 4.14 Although it is not within the scope of this '*refresh*' to provide a comprehensive review and advice on current shopping frontages and PSAs, the results of the revised capacity forecasts do provide high level guidance on whether there is a need to extend Town Centre boundaries and PSAs to accommodate new retail development and investment.
- 4.15 For Felixstowe the existing town centre boundary, as set out in the 2001 Local Plan Proposals Map (Extract 1), is reproduced below.



Map extract 1 - Existing Town Centre Boundary and Primary Shopping Area

Scale 1:3500



- 4.16 The Town Centre boundary (green dashed line) covers the central parts of Felixstowe and is the location for the majority of the town centre activities including the food store permission at Railway Approach (reference C/12/2395) and the public house permission at Hamilton Road (reference DC/14/1658/FUL). Based on our high level review of the extent of the town centre and the location of planned commitments, we consider that the Town Centre boundary is appropriate in this case, although we agree with the Council that the boundary may need to be extended slightly in the North West corner to fully take into account the extent of the Railway Approach development opportunity.
- 4.17 Local Plan saved *Policy AP179* defines the Primary Shopping Area (PSA) as being Hamilton Road, between Orwell Road and Cobbold Road; as shown by the solid blue line on the map. Due to the importance of maintaining and promoting the central retail area of Felixstowe town centre, the existing policy seeks to resist changes of use of shops to non-shopping uses at ground floor level.
- 4.18 Notwithstanding this, we advise the Council that the PSA identified on the Map is in fact the Town Centre's Primary Shopping Frontage (PSF), as defined by the NPPF (Annex 2) and should therefore be redefined as such to avoid confusion.

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- 4.19 We understand that a key task of the AAP will include a review of the primary retail frontage by examining indicators such as rateable values and footfall. Against this background the Map shows the potential to extend the PSF to include the retail units which front onto 'the Triangle'. We consider that this is a reasonable and robust proposal, particularly as this frontage includes national multiple Class A1 retailers and services such as Tesco, Specsavers Poundland and Rosebys.
- 4.20 However we disagree with the Council's current view that, due to the size of Felixstowe town centre, it is not appropriate to identify a secondary retail frontage. This is because the frontages stretching from 'the Triangle' to the north end of Hamilton Road provide significant variety and diverse uses that make an important contribution to the Town Centre's overall vitality and viability. This area includes the Co-Op and permitted foodstore at Railway Approach (reference C/12/2395) and public house (reference DC/14/1658/FUL) that together will effectively anchor the northern end of Hamilton Road. As a result, we advise the Council that it would be appropriate to define a secondary retail frontage that includes this part of Hamilton Road to the north, probably stretching as far as the Co-Op.
- 4.21 Once the primary and secondary frontages have been clearly defined, it will then be necessary to draw a Primary Shopping Area (PSA) that, as the NPPF states, *"generally comprises the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage"*.
- 4.22 This PSA will be different to the extent of the currently defined Town Centre boundary. This distinction is vitally important to retail planning, as the NPPF is clear that the definition of *"edge-of-centre"* for retail purposes is *"a location that is well connected and up to 300 metres of the primary shopping area"* (our emphasis underlined). At present the Council's plans do not show a PSA for Felixstowe Town Centre and are therefore not compliant with the NPPF. Defining the PSA should also enable the Council to manage Permitted Development Rights (PDR), principally from retail to residential use.
- 4.23 We note that the Council has adopted similar approaches for the District's other main centres. We therefore advise that they should carry out a detailed and comprehensive review of the definition of primary and secondary frontages and PSAs as a priority, as this more detailed work is beyond the scope of this study. Notwithstanding this, in light of the revised retail capacity forecasts and the more limited need for new retail floorspace up to 2025, we consider that the defined centre boundaries appear to be reasonable and appropriate for the District's other main centres, namely Woodbridge, Aldeburgh, Saxmundham, Leiston and Framlingham.
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IMPACT ASSESSMENT: LOCAL FLOORSPACE THRESHOLD

- 4.24 Finally, we have reviewed whether the local planning authority should set a local (floorspace-based) impact threshold as part of its local policy, rather than the default of 2,500m² gross identified by the NPPF (paragraph 26).
- 4.25 This is important as it will determine whether applicants should carry out an impact assessment for new retail, leisure and office development outside of town centres that are not in accordance with an up-to-date Local Plan.
- 4.26 The *National Planning Practice Guidance* (NPPG) published in March 2014 provides advice in setting a locally appropriate threshold and states that it will be important to consider the:
- scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable;
 - likely effects of development on any town centre strategy; and
 - impact on any other planned investment.
- 4.27 We cannot advise the Council in detail on this matter as we have not carried out a comprehensive health check or audit of the overall vitality and viability of the District's main town centres. Notwithstanding this, it is apparent that Felixstowe Town Centre and other centres in the District are increasingly vulnerable to impacts from out-of-centre retailing and the growth of internet shopping, as well as competition from larger competing centres, such as Ipswich.
- 4.28 Out-of-centre retail provision in the District is currently limited to Ipswich's Eastern Fringe. Although this predominantly serves Ipswich's large urban population, it does result in a significant leakage of shoppers and expenditure from Felixstowe's catchment. Furthermore the permission for a new Asda foodstore at Haven Exchange will inevitably draw shoppers and trade from Felixstowe Town Centre. The fact that there is also no capacity for new retail floorspace over the forecast period due to new commitments, including Haven Exchange, also points to the need for a lower impact threshold to help maintain the overall vitality and viability of Felixstowe Town Centre and, fundamentally, enable the Council to monitor and assess the implications of new edge and out of centre applications on their merits on a case-by-case basis.
- 4.29 With regard to the District's smaller centres, they could all be vulnerable to varying degrees to the dynamic growth in smaller convenience stores operated by the major grocers (i.e. Sainsbury's Local, Tesco Express, Little Waitrose, etc.). Although the size of stores will vary from location-to-location, the main grocers are generally seeking new convenience stores with an average gross floorspace of between 400-500m². In

circumstances where these smaller stores are proposed on the edge or outside of smaller local and village centres, often as part of petrol filling stations, they could result in a significant adverse impact on their trading performance, and overall vitality and viability. This will particularly be the case where smaller centres and villages are dependent on smaller supermarkets and convenience ('top-up') stores to anchor their retail offer and generate footfall and linked trips/expenditure to the benefit of other shops, services and facilities. This is generally the case for a number of the District's smaller centres that rely on their food and convenience stores to help underpin their overall vitality and viability.

- 4.30 In addition, modern retailers selling a range of comparison goods (including fashion, homestore and 'bulky' goods retailers) generally have requirements for larger format shop units with a minimum floorspace of between 500m² and 1,000m² gross. This scale of floorspace provides operators with the necessary minimum 'critical mass' of sales needed to display their full range of goods in-store and attract customers from a wider catchment area, particularly where they are co-located alongside similar stores in town centre and out-of-centre locations. In general terms larger format non-food stores of over 500 m² gross are also unlikely to trade as a purely local facility¹⁵.
- 4.31 We therefore conclude in this case that it is reasonable for applicants proposing developments for new comparison and convenience goods retailing of 400m² gross and above to demonstrate that they will not have a significant adverse impact on the District's network of centres, either on their own or cumulatively with other commitments in the area, in accordance with the NPPF.
- 4.32 In our judgement this is a reasonable impact threshold as it will provide the local planning authority with sufficient flexibility to assess the merits and implications of edge and out-of-centre foodstore applications that could potentially have significant implications for the viability and delivery of new or extended floorspace in these existing centres. We also advise that this threshold should be applied, where relevant, to change of use applications and applications seeking variations of conditions.
- 4.33 We also consider that a 400m² gross impact threshold is reasonable in this case based on our experience of advising other local planning authorities, and also drawing on the range of impact thresholds identified in recently adopted local plans (see table below). These locally set thresholds have all been subject to detailed consultation and assessment by Inspectors and Examinations in Public, and found to be robust and sound.

¹⁵ According to the Sunday Trading laws a 'large shop' is defined as being over 280m² gross. This provides a broad indication at the national level as to what constitutes a 'large shop' capable of generating a reasonable amount of trade (and, therefore, the potential to result in an impact on shopping patterns).

ADOPTED LOCAL PLAN/ CORE STRATEGY	LOCALLY SET IMPACT THRESHOLD
Allerdale	100 - 500 sqm (settlement based)
Blaby	929 sqm gross
Cheshire West & Chester	200 – 1,000 sqm (settlement based)
Dacorum	1,000 sqm gross
West Northamptonshire	1,000 sqm gross
East Cambridgeshire	280 sqm net
Christchurch & East Dorset	500 - 1,000 sqm gross (settlement based)
Erewash	2,500 sqm gross
Gateshead & Newcastle upon Tyne	2,500 sqm gross
Gravesham	2,500 sqm gross
Halton	2,000 sqm gross
Swindon	600 sqm
Winchester	1,000 sqm gross

- 4.34 Notwithstanding the adoption of a lower locally set impact threshold, it is important that the scope of any Retail Impact Assessment (RIA) in support of planning applications is discussed and agreed between the applicants and the Council at an early stage in the pre-application process. The level of detail included within a RIA should be proportionate to the scale and type of retail floorspace proposed, and should be agreed between the Council and applicant on a case-by-case basis.

MARTLESHAM HEATH

- 4.35 Notwithstanding the absence of an up-to-date household survey since 2003 detailing current shopping patterns and market shares within the District, it is apparent that the increase in convenience and comparison goods floorspace on Ipswich's Eastern Fringe, including at Martlesham Heath, has significantly increased the competition from these out-of-centre shopping facilities with the District's main centres, and principally Woodbridge and Felixstowe Town Centre. Even in 2003 the food and non-food stores were achieving a significant market share of 35.7% of convenience goods retailing within the defined study area and a 12.7% market share for comparison goods. These market shares will have increased significantly over the last 12 years.
- 4.36 As part of the *Site Allocations and Area Specific Policies* Issues and Options document the Council identified the following three possible approaches for the Martlesham Heath Area (paragraph 4.12):
- To redesignate the whole area as a strategic employment site, but with a bias towards ICT uses.

- To split the existing general employment area designation into two. This would see the area within the BT fence line designated as the strategic employment site, reflecting the fact that this area currently comprises the ICT cluster (Core Strategy Policy SP5), which is of sub-regional and national importance. The remaining area would continue to be designated as a general employment use.
- A variation of the second approach would be to split out the existing main retail area to the north with a view to maintain current levels of provision, but limiting additional provision to safeguard impact on neighbouring town and district centres. The central area would remain primarily as a general employment area, within an emphasis on more traditional employment, rather than leisure or other activities coming forward as sites are redeveloped and existing vacant lots built out.

4.37 In response, we advise the Council that maintaining and improving the vitality and viability of the District's main centres is a key priority, in line with national and local plan objectives to promote new development and investment in town centres first ahead of out-of-centre locations. In our view any further growth in the Class A1 retail and commercial leisure provision in the Martlesham Heath area has the potential, both by itself and cumulatively with other new retail floorspace, to have a significant adverse impact on the vitality and viability of the District's main centres, and any existing or planned public and private sector investment in these centres. Against this background we believe that our recommendation for a locally set impact threshold of 400m² gross will better enable the local planning authority to manage and plan for any future applications for new and/or extended retail, commercial leisure and other main town centre uses in the Martlesham Heath area in accordance with the NPPF and local plan policy.

4.38 Given the controls that the lower locally set impact threshold will afford the local planning authority, we are not convinced as to the merits of defining a separate retail boundary to the north. In our view the very act of 'ring-fencing' the area for retail uses could serve to reinforce the area as an established shopping location in retail planning terms, and thereby make it more attractive as a preferred location for new retail investment and development.

5.0 GLOSSARY & ABBREVIATIONS

CITY CENTRES:	The highest level of centre identified in development plans. In terms of hierarchies, they will often be a regional centre and will serve a wide catchment. The centre may be very large, embracing a wide range of activities and may be distinguished by areas which may perform different main functions.
TOWN CENTRES:	Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.
DISTRICT CENTRES:	District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.
LOCAL CENTRES:	Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette.
TOWN CENTRE USES:	Main town centre uses are retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, nightclubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, cultural and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
TOWN CENTRE BOUNDARY:	Defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on a proposals map.
PRIMARY SHOPPING AREA (PSA)	Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.
PRIMARY & SECONDARY FRONTAGES	Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses, such as restaurants, cinemas and businesses.
EDGE-OF-CENTRE	For retail purposes, a location that is well connected up to 300 metres from the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge-of-centre, account should be taken of local circumstances.
OUT-OF-CENTRE	A location which is not in or on the edge of a centre but not necessarily outside the urban area.
OUT-OF-TOWN	A location out of centre that is outside the existing urban area.
CONVENIENCE SHOPPING	Convenience retailing is the provision of everyday essential items, including food, drinks, newspapers/magazines and confectionery.
SUPERMARKETS	Self-service stores selling mainly food, with a trading floorspace less than 2,500 square metres, often with car parking.
SUPERSTORES	Self-service stores selling mainly food, or food and non-food goods, usually with more than 2,500 square metres trading floorspace, with supporting car parking.
COMPARISON SHOPPING	Comparison retailing is the provision of items not obtained on a frequent basis. These

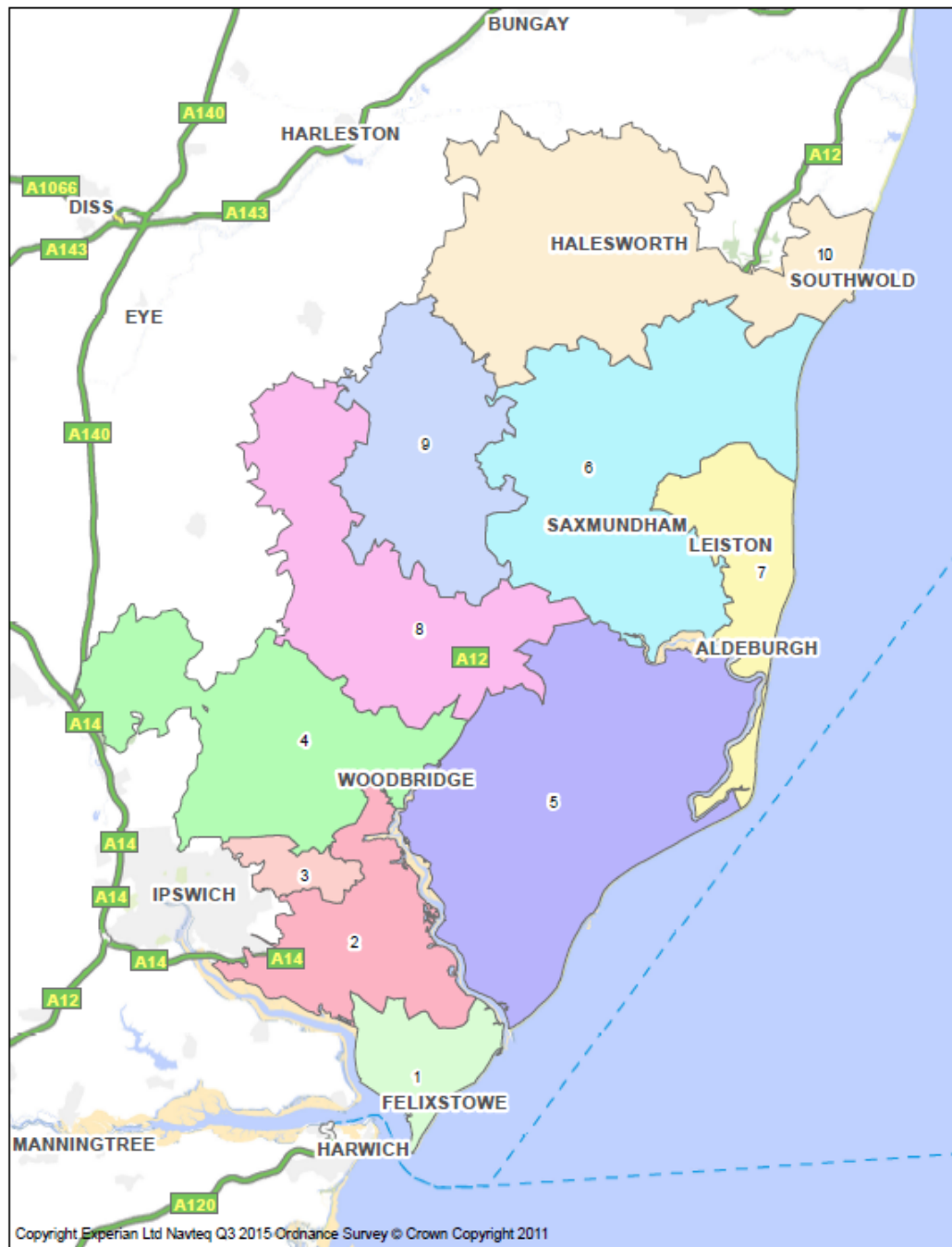
	include clothing, footwear, household and recreational goods.
RETAIL WAREHOUSES	Large stores specialising in the sale of household goods (such as carpets, furniture and electrical goods), DIY items and other ranges of goods, catering mainly for car-borne customers.
RETAIL PARKS	An agglomeration of at least 3 retail warehouses.
WAREHOUSE CLUBS	Large businesses specialising in volume sales of reduced priced goods. The operator may limit access to businesses, organisations or classes of individual.
FACTORY OUTLET CENTRES	Groups of shops specialising in selling seconds and end-of-line goods at discounted prices.
REGIONAL & SUB-REGIONAL SHOPPING CENTRES	Out-of-centre shopping centres which are generally over shopping centres 50,000 square metres gross retail area, typically comprising a wide variety of comparison goods stores.
LEISURE PARKS	Leisure parks often feature a mix of leisure facilities, such as a multi-screen cinema, indoor bowling centres, night club, restaurants, bars and fast-food outlets, with car parking.
CONVENIENCE GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP categories: Food and non-alcoholic beverages, Tobacco, Alcoholic beverages (off-trade), Newspapers and periodicals, Non-durable household goods.
COMPARISON GOODS EXPENDITURE	Expenditure (including VAT as applicable) on goods in COICOP Categories: Clothing materials & garments, Shoes & other footwear, Materials for maintenance & repair of dwellings, Furniture & furnishings; carpets & other floor coverings, Household textiles, Major household appliances, whether electric or not, Small electric household appliances, Tools & miscellaneous accessories, Glassware, tableware & household utensils, Medical goods & other pharmaceutical products, Therapeutic appliances & equipment, Bicycles, Recording media, Games, toys & hobbies; sport & camping equipment; musical instruments, Gardens, plants & flowers, Pets & related products, Books & stationery, Audio-visual, photographic and information processing equipment, Appliances for personal care, Jewellery, watches & clocks, Other personal effects.
SPECIAL FORMS OF TRADING	All retail sales not in shops and stores; including sales via the internet, mail order, TV shopping, party plan, vending machines, door-to-door and temporary open market stalls.
GROSS GROUND FLOOR FOOTPRINT FLOORSPACE	The area shown on the Ordnance Survey map or other plans as being occupied by buildings and covered areas measured externally.
GROSS RETAIL FLOORSPACE	The total built floor area measured externally which is occupied exclusively by a retailer or retailers; excluding open areas used for the storage, display or sale of goods.
NET RETAIL SALES AREA	The sales area within a building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.
RETAIL SALES DENSITY	Convenience goods, comparison goods or all goods retail sales (stated as including or excluding VAT) for a specified year on the price basis indicated, divided by the net retail sales area generating those sales.
FLOORSPACE 'PRODUCTIVITY' ('EFFICIENCY') GROWTH	The percentage by which a retail sales density is assumed to increase annually in real terms over a stated period. The choice of the most appropriate level of growth will depend on individual circumstances, and in particular the capacity of existing floorspace to absorb increased sales. It is also important that selected rates of growth in productivity are compatible with assumptions about the growth in per capita expenditure.
QUANTITATIVE NEED	Is conventionally measured as expenditure capacity (i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area). Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increase in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.
QUALITATIVE NEED	Includes more subjective measures such as, for example, consumer choice; the

	appropriate distribution of facilities; and the needs of those living in deprived areas. 'Over trading' is also identified as a measure of qualitative need, although evidence of significant over-crowding, etc., may also be an indicator of quantitative need.
OVERTRADING	The extent to which the turnover of existing stores significantly exceeds benchmark turnovers may be a qualitative indicator of need, and in some cases inform quantitative need considerations. For example it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality. In certain cases 'overtrading' occurs when there is an imbalance between demand (i.e. available spend) and supply (i.e. existing floorspace capacity).
BENCHMARK TURNOVER	In the case of specific types of provision (such as foodstores) company average turnover figures are widely available and can provide an indication of a 'benchmark' turnover for existing facilities. However, turnover benchmarks should not be used prescriptively or in isolation to indicate a measure of 'need'. It is important to recognise that a range of factors (such as rental levels and other operating costs) mean that operators are likely to trade at a wide range of turnover levels. Given the inherent margins of error involved in this type of exercise, the use of company averages as benchmarks should be treated with caution unless they are corroborated by other independent evidence of under-performance, or strong trading. Examples might include the results of in-centre health checks, or the extent of congestion in stores and queuing at checkouts.

– END –

APPENDIX 1: STUDY AREA

SUFFOLK COASTAL ZONES MAP



APPENDIX 2: POPULATION AND EXPENDITURE FORECASTS

TABLE 1: BASE YEAR (2015) POPULATION & PROJECTIONS (to 2030)

ZONE:	2015	2020	2025	2027	2031	
Zone 1	28,812	29,432	30,205	30,489	31,043	
Zone 2	10,285	10,491	10,743	10,841	11,033	
Zone 3	19,248	19,598	20,046	20,210	20,532	
Zone 4	15,553	15,882	16,268	16,414	16,698	
Zone 5	10,910	11,129	11,384	11,480	11,669	
Zone 6	11,455	11,639	11,881	11,965	12,125	
Zone 7	9,707	9,911	10,164	10,259	10,448	
Zone 8	7,386	7,526	7,693	7,755	7,877	
Zone 9	6,437	6,588	6,753	6,815	6,934	
Zone 10	15,052	15,264	15,550	15,656	15,865	
TOTAL:	134,845	137,460	140,687	141,884	144,224	0

GROWTH 2015 to 2030:

%	2015-30
7.7%	2,231
7.3%	748
6.7%	1,284
7.4%	1,145
7.0%	759
5.8%	670
7.6%	741
6.6%	491
7.7%	497
5.4%	813
6.8%	9,379

Source: EXPERIAN BUSINESS STRATEGIES - The base year (2015) population and projections to 2031 have been sourced directly from Experian's latest '*Retail Area Planner*' Reports for each study zone using SP's (Experian-based) MMG3 Geographic Information System (GIS). The base year population estimates are based on 2012 ONS (mid-year) population figures. The population projections for each Study Zone draw on Experian's revised 'demographic component model'. This takes into account 2012 mid-year age and gender estimates and projects the population forward year-on-year based on Government population projections for local authority areas in England. The yearly components of population change that are taken into account are the birth rate (0-4 age band); ageing; net migration; and death rate.

TABLE 2: CONVENIENCE GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:		2015	2015	2020	2025	2027	2031
		(incl SFT)	Exlcuding Special Forms of Trading				
Market Share of SFT (adjusted for sales from stores):			2.80%	4.0%	4.9%	5.1%	5.4%
Zone 1	£2,164		£2,103	£2,136	£2,180	£2,202	£2,243
Zone 2	£2,464		£2,395	£2,433	£2,483	£2,507	£2,555
Zone 3	£2,167		£2,107	£2,140	£2,184	£2,205	£2,247
Zone 4	£2,484		£2,414	£2,452	£2,503	£2,528	£2,575
Zone 5	£2,372		£2,305	£2,341	£2,390	£2,413	£2,459
Zone 6	£2,345		£2,280	£2,315	£2,363	£2,387	£2,431
Zone 7	£2,103		£2,044	£2,076	£2,119	£2,140	£2,180
Zone 8	£2,530		£2,459	£2,497	£2,549	£2,574	£2,623
Zone 9	£2,361		£2,295	£2,331	£2,379	£2,403	£2,448
Zone 10	£2,347		£2,281	£2,317	£2,365	£2,388	£2,433

Source: Average spend per capita estimates (2013 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 12.1 published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 12.1.

TABLE 3: COMPARISON GOODS EXPENDITURE PER CAPITA FORECASTS (excluding SFT)

ZONE:		2015	2015	2020	2025	2027	2031
		(incl SFT)	Exlcuding Special Forms of Trading				
Market Share of SFT (adjusted for sales from stores):			12.50%	15.7%	15.9%	15.8%	5.6%
Zone 1	£3,442		£3,012	£3,380	£3,959	£4,229	£4,833
Zone 2	£4,312		£3,773	£4,235	£4,960	£5,299	£6,055
Zone 3	£3,593		£3,144	£3,529	£4,133	£4,415	£5,045
Zone 4	£4,427		£3,874	£4,348	£5,092	£5,440	£6,217
Zone 5	£4,022		£3,520	£3,950	£4,626	£4,943	£5,648
Zone 6	£3,803		£3,328	£3,735	£4,374	£4,673	£5,340
Zone 7	£3,203		£2,803	£3,145	£3,684	£3,936	£4,498
Zone 8	£4,473		£3,914	£4,393	£5,145	£5,496	£6,281
Zone 9	£3,921		£3,431	£3,851	£4,510	£4,818	£5,506
Zone 10	£3,695		£3,233	£3,629	£4,250	£4,541	£5,189

Source: Average spend per capita estimates (2013 prices) are derived from Experian 'Retail Area Planner' Reports using the MMG3 GIS and the year-on-year expenditure growth forecasts have been informed by the latest Retail Planner Briefing Note 12.1 published by Experian Business Strategies (October 2014).

Notes: An allowance has been made for the market share of retail expenditure per capita on non-store sales (SFT - including mail order and Internet shopping) at the base year using the household survey market shares for SFT. Forecast growth in SFT is based on the year-on-year forecasts published by Experian Business Strategies in the most recent Retail Planner Briefing Note 12.1.

TABLE 4: TOTAL AVAILABLE CONVENIENCE GOODS EXPENDITURE, 2015 - 2031 (£m)

ZONE:	2015	2015	2020	2025	2027	2031
	(incl SFT)	Excluding Special Forms of Trading				
Zone 1	£62.3	£60.600	£62.871	£65.858	£67.136	£69.642
Zone 2	£25.3	£24.634	£25.519	£26.673	£27.183	£28.185
Zone 3	£41.7	£40.548	£41.930	£43.777	£44.572	£46.135
Zone 4	£38.6	£37.549	£38.942	£40.714	£41.486	£42.999
Zone 5	£25.9	£25.151	£26.056	£27.205	£27.706	£28.692
Zone 6	£26.9	£26.113	£26.947	£28.077	£28.555	£29.482
Zone 7	£20.4	£19.839	£20.572	£21.534	£21.951	£22.776
Zone 8	£18.7	£18.162	£18.795	£19.610	£19.964	£20.660
Zone 9	£15.2	£14.772	£15.355	£16.065	£16.373	£16.973
Zone 10	£35.3	£34.337	£35.364	£36.773	£37.390	£38.603
#REF!	£310.4	£301.704	£312.352	£326.286	£332.318	£344.146

Source: Tables 1 and 2

GROWTH: 2015-30

%	£m
14.9%	£9.042
14.4%	£3.552
13.8%	£5.586
14.5%	£5.450
14.1%	£3.542
12.9%	£3.369
14.8%	£2.937
13.8%	£2.498
14.9%	£2.201
12.4%	£4.266
14.1%	£42.442

TABLE 4: TOTAL AVAILABLE COMPARISON GOODS EXPENDITURE, 2015 - 2031 (£m)

ZONE:	2015	2015	2020	2025	2027	2031
	(incl SFT)	Excluding Special Forms of Trading				
Zone 1	£99.2	£86.770	£99.479	£119.569	£128.943	£150.025
Zone 2	£44.4	£38.807	£44.426	£53.281	£57.442	£66.804
Zone 3	£69.2	£60.516	£69.153	£82.842	£89.229	£103.590
Zone 4	£68.9	£60.253	£69.053	£82.840	£89.297	£103.809
Zone 5	£43.9	£38.400	£43.961	£52.667	£56.742	£65.908
Zone 6	£43.6	£38.120	£43.470	£51.970	£55.915	£64.751
Zone 7	£31.1	£27.206	£31.175	£37.444	£40.377	£46.991
Zone 8	£33.0	£28.909	£33.060	£39.579	£42.625	£49.475
Zone 9	£25.2	£22.085	£25.368	£30.455	£32.836	£38.178
Zone 10	£55.6	£48.670	£55.393	£66.091	£71.090	£82.322
TABLE 4:	£514.0	£449.736	£514.537	£616.738	£664.497	£771.853

Source: Tables 1 and 3

GROWTH: 2015-30

%	£m
72.9%	£63.255
72.1%	£27.997
71.2%	£43.074
72.3%	£43.556
71.6%	£27.509
69.9%	£26.631
72.7%	£19.785
71.1%	£20.566
72.9%	£16.092
69.1%	£33.651
71.6%	£322.116

APPENDIX 3: CONVENIENCE GOODS – MARKET SHARE ANALYSIS

TABLE 1: ALL CONVENIENCE GOODS - 2008 MARKET SHARE ANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
Co-Op	21.7%	4.8%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	3.2%	0.0%	4.9%
Tesco Metro	16.7%	0.0%	1.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.5%
Other Convenience	9.0%	1.4%	0.3%	0.0%	0.0%	0.6%	0.7%	0.0%	0.0%	0.0%	2.1%
FELIXSTOWE - TOWN CENTRE:	47.4%	6.2%	1.5%	0.0%	0.0%	0.6%	1.0%	0.0%	3.2%	0.0%	10.5%
Morrisons, Grange Farm Avenue	27.1%	7.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%
CAVENDISH PARK DISTRICT CENTRE	27.1%	7.7%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.1%
Budgens	0.0%	8.5%	0.0%	10.9%	7.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.6%
Co-Op	0.0%	3.7%	0.0%	3.8%	4.2%	0.0%	0.0%	5.1%	0.6%	0.0%	1.5%
Other	0.0%	3.3%	0.0%	7.0%	4.7%	0.9%	0.0%	2.2%	2.2%	0.0%	1.9%
WOODBIDGE - TOWN CENTRE:	0.0%	15.5%	0.0%	21.7%	16.0%	0.9%	0.0%	7.3%	2.8%	0.0%	6.0%
Co-Op	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.8%	0.0%	0.0%	0.0%	0.4%
Other	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	2.3%	0.0%	0.0%	0.0%	0.3%
ALDEBURGH - TOWN CENTRE:	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	9.1%	0.0%	0.0%	0.0%	0.7%
Waitrose (formerly Safeway)	0.0%	0.9%	0.0%	0.6%	6.0%	50.7%	19.3%	0.5%	0.0%	1.6%	6.5%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	4.4%	0.7%	0.9%	0.0%	0.0%	0.5%
SAXMUNDHAM - TOWN CENTRE:	0.0%	0.9%	0.0%	0.6%	6.0%	55.1%	20.0%	1.3%	0.0%	1.6%	7.0%
Co-Op	0.0%	0.0%	0.0%	0.0%	0.0%	5.6%	47.6%	0.0%	1.6%	0.0%	3.7%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	2.6%	0.0%	0.0%	0.0%	0.2%
LEISTON - TOWN CENTRE:	0.0%	0.0%	0.0%	0.0%	0.0%	6.3%	50.3%	0.0%	1.6%	0.0%	3.9%
Co-Op	0.8%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	12.4%	39.8%	0.4%	3.1%
Other	0.0%	0.0%	0.0%	0.0%	0.0%	0.6%	0.0%	1.8%	5.8%	0.2%	0.5%
FRAMLINGHAM - TOWN CENTRE:	0.8%	0.0%	0.0%	0.0%	2.5%	0.6%	0.0%	14.2%	45.6%	0.6%	3.6%
Tesco, Kesgrave	0.1%	0.9%	32.9%	2.5%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	4.9%
Tesco, Martlesham Heath	7.2%	40.4%	38.7%	41.4%	56.3%	15.6%	12.8%	33.8%	19.7%	3.8%	25.4%
Sainsbury's, Warren Heath	7.5%	13.2%	7.6%	6.5%	3.5%	0.0%	1.9%	2.9%	6.5%	0.6%	5.4%
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	14.8%	54.5%	79.2%	50.4%	60.2%	15.6%	14.8%	36.7%	26.2%	4.4%	35.7%
ALL OTHER:	9.9%	15.1%	19.0%	26.4%	15.3%	20.8%	4.8%	40.5%	20.5%	93.4%	26.5%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Check	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: 2003, 2008 and 2009 Retail Studies and Updates. Market share analysis based on 2003 household telephone interview survey.

TABLE 2: ALL CONVENIENCE GOODS - 2015 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£60.6	£24.6	£40.5	£37.5	£25.2	£26.1	£19.8	£18.2	£14.8	£34.3	£301.7
Co-Op	£13.13	£1.19	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.48	£0.00	£14.87
Tesco Metro	£10.15	£0.00	£0.46	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£10.61
Other Convenience	£5.47	£0.34	£0.13	£0.00	£0.00	£0.17	£0.13	£0.00	£0.00	£0.00	£6.25
FELIXSTOWE - TOWN CENTRE:	£28.75	£1.54	£0.60	£0.00	£0.00	£0.17	£0.20	£0.00	£0.48	£0.00	£31.73
Morrisons, Grange Farm Avenue	£16.40	£1.90	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£18.43
CAVENIDISH PARK DISTRICT CENTRE:	£16.40	£1.90	£0.13	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£18.43
Budgens	£0.00	£2.10	£0.00	£4.11	£1.77	£0.00	£0.00	£0.00	£0.00	£0.00	£7.98
Co-Op	£0.00	£0.90	£0.00	£1.44	£1.06	£0.00	£0.00	£0.93	£0.08	£0.00	£4.42
Other	£0.00	£0.82	£0.00	£2.62	£1.19	£0.24	£0.00	£0.40	£0.33	£0.00	£5.58
WOODBIDGE - TOWN CENTRE:	£0.00	£3.82	£0.00	£8.16	£4.02	£0.24	£0.00	£1.32	£0.41	£0.00	£17.98
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.35	£0.00	£0.00	£0.00	£1.35
Other	£0.00	£0.00	£0.00	£0.31	£0.00	£0.00	£0.46	£0.00	£0.00	£0.00	£0.77
ALDEBURGH - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.31	£0.00	£0.00	£1.81	£0.00	£0.00	£0.00	£2.12
Waitrose	£0.00	£0.22	£0.00	£0.23	£1.52	£13.25	£3.83	£0.08	£0.00	£0.56	£19.69
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.15	£0.13	£0.16	£0.00	£0.00	£1.44
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.22	£0.00	£0.23	£1.52	£14.40	£3.97	£0.25	£0.00	£0.56	£21.13
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£1.47	£9.45	£0.00	£0.24	£0.00	£11.16
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.53	£0.00	£0.00	£0.00	£0.69
LEISTON - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.00	£0.00	£1.64	£9.98	£0.00	£0.24	£0.00	£11.86
Co-Op	£0.48	£0.00	£0.00	£0.00	£0.63	£0.00	£0.00	£2.25	£5.88	£0.15	£9.39
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.32	£0.86	£0.07	£1.42
FRAMLINGHAM - TOWN CENTRE:	£0.48	£0.00	£0.00	£0.00	£0.63	£0.17	£0.00	£2.57	£6.74	£0.21	£10.81
Tesco, Kesgrave	£0.08	£0.22	£13.36	£0.93	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£14.67
Tesco, Martlesham Heath	£4.35	£9.96	£15.68	£15.54	£14.17	£4.07	£2.55	£6.14	£2.91	£1.31	£76.67
Sainsbury's, Warren Heath	£4.56	£3.24	£3.09	£2.45	£0.89	£0.00	£0.39	£0.53	£0.96	£0.21	£16.32
ISPWICH EASTERN FRINGE - OUT OF CENTRE:	£8.98	£13.43	£32.13	£18.92	£15.14	£4.07	£2.94	£6.67	£3.87	£1.51	£107.66
ALL OTHER:	£5.98	£3.72	£7.70	£9.93	£3.84	£5.43	£0.95	£7.35	£3.03	£32.05	£79.99
	£60.60	£24.63	£40.55	£37.55	£25.15	£26.11	£19.84	£18.16	£14.77	£34.34	£301.70
Check	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

Notes: All expenditure/trade has been allocated to the main centres, stores and shopping locations in the study area by applying the survey-derived market shares in Table 1 to the total available convenience goods expenditure in Appendix 2.

TABLE 3: ALL CONVENIENCE GOODS - 2020 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£62.9	£25.5	£41.9	£38.9	£26.1	£26.9	£20.6	£18.8	£15.4	£35.4	£312.4
Co-Op	£13.62	£1.24	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.50	£0.00	£15.42
Tesco Metro	£10.53	£0.00	£0.48	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.01
Other Convenience	£5.67	£0.36	£0.14	£0.00	£0.00	£0.17	£0.14	£0.00	£0.00	£0.00	£6.48
FELIXSTOWE - TOWN CENTRE:	£29.82	£1.59	£0.62	£0.00	£0.00	£0.17	£0.21	£0.00	£0.50	£0.00	£32.91
Morrisons, Grange Farm Avenue	£17.02	£1.96	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£19.12
CAVENDISH PARK DISTRICT CENTRE:	£17.02	£1.96	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£19.12
Budgens	£0.00	£2.17	£0.00	£4.26	£1.84	£0.00	£0.00	£0.00	£0.00	£0.00	£8.27
Co-Op	£0.00	£0.94	£0.00	£1.49	£1.10	£0.00	£0.00	£0.96	£0.09	£0.00	£4.58
Other	£0.00	£0.85	£0.00	£2.72	£1.23	£0.24	£0.00	£0.41	£0.34	£0.00	£5.79
WOODBIDGE - TOWN CENTRE:	£0.00	£3.96	£0.00	£8.47	£4.17	£0.24	£0.00	£1.37	£0.43	£0.00	£18.64
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.40	£0.00	£0.00	£0.00	£1.40
Other	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£0.47	£0.00	£0.00	£0.00	£0.80
ALDEBURGH - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.32	£0.00	£0.00	£1.88	£0.00	£0.00	£0.00	£2.20
Waitrose	£0.00	£0.23	£0.00	£0.23	£1.57	£13.67	£3.97	£0.09	£0.00	£0.57	£20.34
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.18	£0.14	£0.17	£0.00	£0.00	£1.49
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.23	£0.00	£0.23	£1.57	£14.86	£4.11	£0.25	£0.00	£0.57	£21.83
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£1.52	£9.80	£0.00	£0.25	£0.00	£11.57
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.55	£0.00	£0.00	£0.00	£0.72
LEISTON - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.00	£0.00	£1.69	£10.35	£0.00	£0.25	£0.00	£12.29
Co-Op	£0.50	£0.00	£0.00	£0.00	£0.65	£0.00	£0.00	£2.33	£6.11	£0.15	£9.74
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.17	£0.00	£0.33	£0.89	£0.07	£1.47
FRAMLINGHAM - TOWN CENTRE:	£0.50	£0.00	£0.00	£0.00	£0.65	£0.17	£0.00	£2.66	£7.00	£0.22	£11.22
Tesco, Kesgrave	£0.08	£0.23	£13.81	£0.96	£0.09	£0.00	£0.00	£0.00	£0.00	£0.00	£15.18
Tesco, Martlesham Heath	£4.51	£10.32	£16.21	£16.12	£14.68	£4.20	£2.64	£6.36	£3.02	£1.34	£79.41
Sainsbury's, Warren Heath	£4.73	£3.36	£3.20	£2.54	£0.92	£0.00	£0.40	£0.55	£1.00	£0.21	£16.91
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£9.32	£13.91	£33.22	£19.62	£15.69	£4.20	£3.04	£6.90	£4.02	£1.56	£111.49
ALL OTHER:	£6.21	£3.86	£7.96	£10.30	£3.98	£5.61	£0.98	£7.61	£3.15	£33.01	£82.66
	£62.87	£25.52	£41.93	£38.94	£26.06	£26.95	£20.57	£18.80	£15.35	£35.36	£312.35
Check	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 4: ALL CONVENIENCE GOODS - 2025 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£65.9	£26.7	£43.8	£40.7	£27.2	£28.1	£21.5	£19.6	£16.1	£36.8	£326.3
Co-Op	£14.27	£1.29	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.52	£0.00	£16.15
Tesco Metro	£11.03	£0.00	£0.50	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.53
Other Convenience	£5.94	£0.37	£0.14	£0.00	£0.00	£0.18	£0.15	£0.00	£0.00	£0.00	£6.78
FELIXSTOWE - TOWN CENTRE:	£31.24	£1.67	£0.64	£0.00	£0.00	£0.18	£0.22	£0.00	£0.52	£0.00	£34.47
Morrisons, Grange Farm Avenue	£17.83	£2.05	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.02
CAVENDISH PARK DISTRICT CENTRE:	£17.83	£2.05	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.02
Budgens	£0.00	£2.27	£0.00	£4.46	£1.92	£0.00	£0.00	£0.00	£0.00	£0.00	£8.65
Co-Op	£0.00	£0.98	£0.00	£1.56	£1.15	£0.00	£0.00	£1.00	£0.09	£0.00	£4.78
Other	£0.00	£0.89	£0.00	£2.84	£1.29	£0.25	£0.00	£0.43	£0.36	£0.00	£6.05
WOODBIDGE - TOWN CENTRE:	£0.00	£4.14	£0.00	£8.85	£4.35	£0.25	£0.00	£1.43	£0.45	£0.00	£19.47
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.47	£0.00	£0.00	£0.00	£1.47
Other	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£0.50	£0.00	£0.00	£0.00	£0.83
ALDEBURGH - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£1.97	£0.00	£0.00	£0.00	£2.30
Waitrose	£0.00	£0.24	£0.00	£0.24	£1.64	£14.25	£4.16	£0.09	£0.00	£0.60	£21.22
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.23	£0.15	£0.18	£0.00	£0.00	£1.56
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.24	£0.00	£0.24	£1.64	£15.48	£4.31	£0.26	£0.00	£0.60	£22.77
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£1.58	£10.26	£0.00	£0.26	£0.00	£12.10
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.57	£0.00	£0.00	£0.00	£0.75
LEISTON - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.00	£0.00	£1.76	£10.83	£0.00	£0.26	£0.00	£12.85
Co-Op	£0.53	£0.00	£0.00	£0.00	£0.68	£0.00	£0.00	£2.43	£6.39	£0.16	£10.19
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.18	£0.00	£0.35	£0.93	£0.07	£1.54
FRAMLINGHAM - TOWN CENTRE:	£0.53	£0.00	£0.00	£0.00	£0.68	£0.18	£0.00	£2.78	£7.33	£0.23	£11.73
Tesco, Kesgrave	£0.08	£0.24	£14.42	£1.01	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£15.85
Tesco, Martlesham Heath	£4.72	£10.79	£16.93	£16.85	£15.33	£4.38	£2.77	£6.63	£3.16	£1.40	£82.95
Sainsbury's, Warren Heath	£4.95	£3.51	£3.34	£2.66	£0.96	£0.00	£0.42	£0.57	£1.05	£0.22	£17.68
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£9.76	£14.54	£34.68	£20.52	£16.38	£4.38	£3.19	£7.20	£4.21	£1.62	£116.48
ALL OTHER:	£6.50	£4.03	£8.31	£10.76	£4.15	£5.84	£1.03	£7.94	£3.30	£34.33	£86.19
	£65.86	£26.67	£43.78	£40.71	£27.20	£28.08	£21.53	£19.61	£16.07	£36.77	£326.29
Check	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 5: ALL CONVENIENCE GOODS - 2027 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£67.1	£27.2	£44.6	£41.5	£27.7	£28.6	£22.0	£20.0	£16.4	£37.4	£332.3
Co-Op	£14.55	£1.32	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.53	£0.00	£16.47
Tesco Metro	£11.24	£0.00	£0.51	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£11.75
Other Convenience	£6.06	£0.38	£0.14	£0.00	£0.00	£0.19	£0.15	£0.00	£0.00	£0.00	£6.92
FELIXSTOWE - TOWN CENTRE:	£31.85	£1.70	£0.65	£0.00	£0.00	£0.19	£0.22	£0.00	£0.53	£0.00	£35.13
Morrisons, Grange Farm Avenue	£18.17	£2.09	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.41
CAVENDISH PARK DISTRICT CENTRE:	£18.17	£2.09	£0.14	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£20.41
Budgens	£0.00	£2.32	£0.00	£4.54	£1.95	£0.00	£0.00	£0.00	£0.00	£0.00	£8.81
Co-Op	£0.00	£1.00	£0.00	£1.59	£1.17	£0.00	£0.00	£1.02	£0.09	£0.00	£4.87
Other	£0.00	£0.90	£0.00	£2.89	£1.31	£0.26	£0.00	£0.43	£0.36	£0.00	£6.16
WOODBIDGE - TOWN CENTRE:	£0.00	£4.22	£0.00	£9.02	£4.43	£0.26	£0.00	£1.45	£0.46	£0.00	£19.84
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.50	£0.00	£0.00	£0.00	£1.50
Other	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£0.51	£0.00	£0.00	£0.00	£0.85
ALDEBURGH - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.34	£0.00	£0.00	£2.00	£0.00	£0.00	£0.00	£2.35
Waitrose	£0.00	£0.24	£0.00	£0.25	£1.67	£14.49	£4.24	£0.09	£0.00	£0.61	£21.59
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.26	£0.15	£0.18	£0.00	£0.00	£1.58
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.24	£0.00	£0.25	£1.67	£15.74	£4.39	£0.27	£0.00	£0.61	£23.17
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£1.61	£10.46	£0.00	£0.27	£0.00	£12.33
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.58	£0.00	£0.00	£0.00	£0.77
LEISTON - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.00	£0.00	£1.79	£11.04	£0.00	£0.27	£0.00	£13.10
Co-Op	£0.54	£0.00	£0.00	£0.00	£0.69	£0.00	£0.00	£2.47	£6.51	£0.16	£10.38
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.35	£0.95	£0.07	£1.57
FRAMLINGHAM - TOWN CENTRE:	£0.54	£0.00	£0.00	£0.00	£0.69	£0.19	£0.00	£2.83	£7.47	£0.23	£11.95
Tesco, Kesgrave	£0.08	£0.24	£14.68	£1.03	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£16.14
Tesco, Martlesham Heath	£4.82	£10.99	£17.23	£17.17	£15.61	£4.45	£2.82	£6.75	£3.22	£1.42	£84.49
Sainsbury's, Warren Heath	£5.05	£3.58	£3.40	£2.71	£0.98	£0.00	£0.43	£0.58	£1.07	£0.22	£18.01
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£9.95	£14.82	£35.31	£20.90	£16.68	£4.45	£3.25	£7.33	£4.29	£1.65	£118.64
ALL OTHER:	£6.63	£4.11	£8.46	£10.97	£4.23	£5.94	£1.05	£8.08	£3.36	£34.90	£87.73
	£67.14	£27.18	£44.57	£41.49	£27.71	£28.56	£21.95	£19.96	£16.37	£37.39	£332.32
Check	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 6: ALL CONVENIENCE GOODS - 2030 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£69.6	£28.2	£46.1	£43.0	£28.7	£29.5	£22.8	£20.7	£17.0	£38.6	£344.1
Co-Op	£15.09	£1.37	£0.00	£0.00	£0.00	£0.00	£0.07	£0.00	£0.55	£0.00	£17.08
Tesco Metro	£11.66	£0.00	£0.53	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£12.19
Other Convenience	£6.28	£0.39	£0.15	£0.00	£0.00	£0.19	£0.15	£0.00	£0.00	£0.00	£7.17
FELIXSTOWE - TOWN CENTRE:	£33.04	£1.76	£0.68	£0.00	£0.00	£0.19	£0.23	£0.00	£0.55	£0.00	£36.44
Morrisons, Grange Farm Avenue	£18.85	£2.17	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£21.17
CAVENDISH PARK DISTRICT CENTRE:	£18.85	£2.17	£0.15	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£21.17
Budgens	£0.00	£2.40	£0.00	£4.71	£2.02	£0.00	£0.00	£0.00	£0.00	£0.00	£9.13
Co-Op	£0.00	£1.04	£0.00	£1.65	£1.21	£0.00	£0.00	£1.05	£0.10	£0.00	£5.04
Other	£0.00	£0.94	£0.00	£3.00	£1.36	£0.27	£0.00	£0.45	£0.38	£0.00	£6.38
WOODBIDGE - TOWN CENTRE:	£0.00	£4.37	£0.00	£9.35	£4.59	£0.27	£0.00	£1.50	£0.48	£0.00	£20.56
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£1.55	£0.00	£0.00	£0.00	£1.55
Other	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£0.52	£0.00	£0.00	£0.00	£0.88
ALDEBURGH - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.35	£0.00	£0.00	£2.08	£0.00	£0.00	£0.00	£2.43
Waitrose	£0.00	£0.25	£0.00	£0.26	£1.73	£14.96	£4.40	£0.09	£0.00	£0.63	£22.32
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£1.30	£0.15	£0.19	£0.00	£0.00	£1.64
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.25	£0.00	£0.26	£1.73	£16.25	£4.55	£0.28	£0.00	£0.63	£23.96
Co-Op	£0.00	£0.00	£0.00	£0.00	£0.00	£1.66	£10.85	£0.00	£0.28	£0.00	£12.79
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.60	£0.00	£0.00	£0.00	£0.79
LEISTON - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.00	£0.00	£1.85	£11.45	£0.00	£0.28	£0.00	£13.58
Co-Op	£0.56	£0.00	£0.00	£0.00	£0.72	£0.00	£0.00	£2.56	£6.75	£0.16	£10.75
Other	£0.00	£0.00	£0.00	£0.00	£0.00	£0.19	£0.00	£0.37	£0.99	£0.08	£1.62
FRAMLINGHAM - TOWN CENTRE:	£0.56	£0.00	£0.00	£0.00	£0.72	£0.19	£0.00	£2.93	£7.74	£0.24	£12.38
Tesco, Kesgrave	£0.09	£0.25	£15.20	£1.06	£0.10	£0.00	£0.00	£0.00	£0.00	£0.00	£16.70
Tesco, Martlesham Heath	£5.00	£11.40	£17.84	£17.80	£16.17	£4.60	£2.93	£6.99	£3.34	£1.47	£87.51
Sainsbury's, Warren Heath	£5.24	£3.71	£3.52	£2.80	£1.01	£0.00	£0.44	£0.60	£1.11	£0.23	£18.67
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£10.32	£15.36	£36.55	£21.67	£17.28	£4.60	£3.37	£7.59	£4.44	£1.70	£122.88
ALL OTHER:	£6.88	£4.26	£8.76	£11.37	£4.38	£6.13	£1.09	£8.36	£3.48	£36.04	£90.74
	£69.64	£28.19	£46.13	£43.00	£28.69	£29.48	£22.78	£20.66	£16.97	£38.60	£344.15
Check	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 7: ALL SURVEY-DERIVED CONVENIENCE GOODS TURNOVER: EXCLUDING 'INFLOW'

	2015	2020	2025	2027	2030
	£301.7	£312.4	£326.3	£332.3	£344.1
Co-Op	£14.87	£15.42	£16.15	£16.47	£17.08
Tesco Metro	£10.61	£11.01	£11.53	£11.75	£12.19
Other Convenience	£6.25	£6.48	£6.78	£6.92	£7.17
FELIXSTOWE - TOWN CENTRE:	£31.73	£32.91	£34.47	£35.13	£36.44
Morrisons	£18.43	£19.12	£20.02	£20.41	£21.17
CAVENDISH PARK DISTRICT CENTRE:	£18.43	£19.12	£20.02	£20.41	£21.17
Budgens	£7.98	£8.27	£8.65	£8.81	£9.13
Co-Op	£4.42	£4.58	£4.78	£4.87	£5.04
Other	£5.58	£5.79	£6.05	£6.16	£6.38
WOODBIDGE - TOWN CENTRE:	£17.98	£18.64	£19.47	£19.84	£20.56
Co-Op	£1.35	£1.40	£1.47	£1.50	£1.55
Other	£0.77	£0.80	£0.83	£0.85	£0.88
ALDEBURGH - TOWN CENTRE:	£2.12	£2.20	£2.30	£2.35	£2.43
Waitrose	£19.69	£20.34	£21.22	£21.59	£22.32
Other	£1.44	£1.49	£1.56	£1.58	£1.64
SAXMUNDHAM - TOWN CENTRE:	£21.13	£21.83	£22.77	£23.17	£23.96
Co-Op	£11.16	£11.57	£12.10	£12.33	£12.79
Other	£0.69	£0.72	£0.75	£0.77	£0.79
LEISTON - TOWN CENTRE:	£11.86	£12.29	£12.85	£13.10	£13.58
Co-Op	£9.39	£9.74	£10.19	£10.38	£10.75
Other	£1.42	£1.47	£1.54	£1.57	£1.62
FRAMLINGHAM - TOWN CENTRE:	£10.81	£11.22	£11.73	£11.95	£12.38
Tesco, Kesgrave	£14.67	£15.18	£15.85	£16.14	£16.70
Tesco, Martlesham Heath	£76.67	£79.41	£82.95	£84.49	£87.51
Sainsbury's, Warren Heath	£16.32	£16.91	£17.68	£18.01	£18.67
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£107.66	£111.49	£116.48	£118.64	£122.88
SUFFOLK COASTAL TOTAL TURNVER:	£221.72	£229.69	£240.09	£244.59	£253.40

ALL OTHER:	£79.99	£82.66	£86.19	£87.73	£90.74
	£301.70	£312.35	£326.29	£332.32	£344.15
Check	£0.00	£0.00	£0.00	£0.00	£0.00

TABLE 7a: ALL CONVENIENCE GOODS TURNOVER: INCLUDING 'INFLOW'

'Inflow' from outside Study Area	2015	2020	2025	2027	2030	% GROWTH 2015-2030
5%	£15.65	£16.24	£17.00	£17.33	£17.98	14.9%
5%	£11.17	£11.59	£12.14	£12.37	£12.83	14.9%
0%	£6.25	£6.48	£6.78	£6.92	£7.17	14.8%
4%	£33.07	£34.30	£35.92	£36.62	£37.98	14.9%
15%	£21.68	£22.49	£23.56	£24.01	£24.91	14.9%
15%	£21.68	£22.49	£23.56	£24.01	£24.91	14.9%
5%	£8.40	£8.71	£9.10	£9.27	£9.61	14.4%
5%	£4.65	£4.82	£5.03	£5.13	£5.31	14.2%
5%	£5.88	£6.09	£6.37	£6.49	£6.72	14.3%
5%	£18.93	£19.62	£20.50	£20.88	£21.64	14.3%
5%	£1.43	£1.48	£1.55	£1.58	£1.64	14.8%
5%	£0.81	£0.84	£0.88	£0.89	£0.93	14.7%
5%	£2.23	£2.31	£2.42	£2.47	£2.56	14.8%
5%	£20.72	£21.41	£22.33	£22.73	£23.50	13.4%
5%	£1.52	£1.57	£1.64	£1.67	£1.72	13.2%
5%	£22.24	£22.98	£23.97	£24.39	£25.22	13.4%
5%	£11.75	£12.18	£12.74	£12.98	£13.46	14.6%
5%	£0.73	£0.76	£0.79	£0.81	£0.84	14.3%
5%	£12.48	£12.93	£13.53	£13.79	£14.30	14.5%
5%	£9.88	£10.26	£10.72	£10.92	£11.32	14.5%
5%	£1.49	£1.55	£1.62	£1.65	£1.71	14.3%
5%	£11.38	£11.81	£12.34	£12.57	£13.03	14.5%
45%	£26.68	£27.59	£28.81	£29.34	£30.37	13.8%
45%	£139.40	£144.37	£150.82	£153.62	£159.11	14.1%
45%	£29.67	£30.74	£32.14	£32.75	£33.95	14.4%
45%	£195.75	£202.71	£211.77	£215.71	£223.42	14.1%
-	£317.76	£329.16	£344.02	£350.45	£363.06	14.3%

0%	£79.99	£82.66	£86.19	£87.73	£90.74	13.4%
24%	£397.75	£411.82	£430.21	£438.18	£453.80	14.1%
24%	£397.75	£411.82	£430.21	£438.18	£453.80	

APPENDIX 4: COMPARISON GOODS – MARKET SHARE ANALYSIS

TABLE 1: ALL COMPARISON GOODS - 2008 MARKET SHARE ANALYSIS (%): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
FELIXSTOWE - TOWN CENTRE:	46.9%	14.0%	3.5%	0.5%	2.2%	0.3%	0.6%	1.7%	0.6%	0.0%	11.2%
WOODBIDGE - TOWN CENTRE:	0.0%	17.9%	6.6%	22.5%	24.1%	5.1%	2.1%	9.6%	13.8%	0.0%	9.4%
ALDEBURGH - TOWN CENTRE:	0.0%	0.3%	0.0%	0.4%	0.5%	1.0%	4.1%	0.6%	0.0%	0.0%	0.5%
SAXMUNDHAM - TOWN CENTRE:	0.0%	0.0%	0.0%	0.5%	0.6%	12.4%	0.9%	0.3%	0.0%	0.1%	1.3%
LEISTON - TOWN CENTRE:	0.0%	0.2%	0.0%	0.1%	0.6%	5.4%	18.6%	0.0%	0.0%	0.0%	1.7%
FRAMLINGHAM - TOWN CENTRE:	0.1%	0.4%	0.0%	0.2%	0.0%	0.7%	0.4%	1.4%	14.5%	0.0%	1.0%
IPSWICH EASTER FRINGE - OUT OF CENTRE:	10.1%	14.3%	20.8%	14.0%	15.8%	10.6%	11.8%	17.1%	10.1%	2.7%	12.7%
ALL OTHER:	42.8%	52.8%	69.0%	61.7%	56.2%	64.6%	61.6%	69.4%	61.0%	97.2%	62.3%
	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

TABLE 2: ALL COMPARISON GOODS - 2015 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

	ZONE 1	ZONE 2	ZONE 3	ZONE 4	ZONE 5	ZONE 6	ZONE 7	ZONE 8	ZONE 9	ZONE 10	TOTAL STUDY AREA
TOTAL AVAILABLE EXPENDITURE:	£86.8	£38.8	£60.5	£60.3	£38.4	£38.1	£27.2	£28.9	£22.1	£48.7	£449.7
FELIXSTOWE - TOWN CENTRE:	£40.70	£5.42	£2.13	£0.29	£0.84	£0.11	£0.17	£0.48	£0.12	£0.00	£50.27
WOODBIDGE - TOWN CENTRE:	£0.01	£6.96	£4.00	£13.58	£9.27	£1.94	£0.57	£2.77	£3.06	£0.00	£42.17
ALDEBURGH - TOWN CENTRE:	£0.00	£0.13	£0.00	£0.27	£0.17	£0.39	£1.12	£0.17	£0.00	£0.00	£2.25
SAXMUNDHAM - TOWN CENTRE:	£0.00	£0.00	£0.00	£0.32	£0.25	£4.72	£0.25	£0.07	£0.00	£0.06	£5.66
LEISTON - TOWN CENTRE:	£0.03	£0.06	£0.00	£0.07	£0.22	£2.05	£5.05	£0.00	£0.00	£0.00	£7.48
FRAMLINGHAM - TOWN CENTRE:	£0.12	£0.17	£0.00	£0.12	£0.00	£0.26	£0.10	£0.41	£3.20	£0.00	£4.38
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£8.74	£5.56	£12.60	£8.44	£6.08	£4.04	£3.20	£4.95	£2.24	£1.32	£57.17
ALL OTHER:	£37.17	£20.49	£41.78	£37.17	£21.57	£24.61	£16.75	£20.06	£13.47	£47.29	£280.36
	£86.77	£38.81	£60.52	£60.25	£38.40	£38.12	£27.21	£28.91	£22.09	£48.67	£449.74

Notes: Check
All expenditure/trade has been allocated to the main centres, stores and shopping locations in the study area by applying the survey-derived market shares in Table 1 to the total available convenience goods expenditure in Appendix 2.

TABLE 3: ALL COMPARISON GOODS - 2020 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

[illegible]

TABLE 4: ALL COMPARISON GOODS - 2025 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

[illegible]

TABLE 5: ALL COMPARISON GOODS - 2027 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

[illegible]

TABLE 6: ALL COMPARISON GOODS - 2030 MARKET SHARE ANALYSIS (£ million): EXCLUDING EXPENDITURE ON SPECIAL FORMS OF TRADING

[illegible]

TABLE 7: ALL SURVEY-DERIVED CONVENIENCE GOODS TURNOVER: EXCLUDING 'INFLOW'

	2015	2020	2025	2027	2030
	£449.7	£514.5	£616.7	£664.5	£743.3
FELIXSTOWE - TOWN CENTRE:	£50.27	£57.61	£69.21	£74.63	£83.57
WOODBIDGE - TOWN CENTRE:	£42.17	£48.28	£57.88	£62.37	£69.79
ALDEBURGH - TOWN CENTRE:	£2.25	£2.58	£3.09	£3.33	£3.72
SAXMUNDHAM - TOWN CENTRE:	£5.66	£6.46	£7.72	£8.31	£9.28
LEISTON - TOWN CENTRE:	£7.48	£8.56	£10.27	£11.07	£12.39
FRAMLINGHAM - TOWN CENTRE:	£4.38	£5.03	£6.04	£6.51	£7.28
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	£57.17	£65.42	£78.43	£84.51	£94.55
SUFFOLK COASTAL TOTAL TURNVER:	£169.38	£193.94	£232.64	£250.73	£280.59

ALL OTHER:	£280.36	£320.60	£384.09	£413.76	£462.73
	£449.74	£514.54	£616.74	£664.50	£743.32

Check	£0.00	£0.00	£0.00	£0.00	£0.00
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TABLE 7a: ALL CONVENIENCE GOODS TURNOVER: INCLUDING 'INFLOW'

'Inflow' from outside Study Area	2015	2020	2025	2027	2030	% GROWTH 2015-2030
10%	£55.85	£64.01	£76.90	£82.92	£92.86	66.3%
5%	£44.39	£50.82	£60.93	£65.66	£73.46	65.5%
5%	£2.37	£2.71	£3.25	£3.50	£3.92	65.6%
10%	£6.29	£7.18	£8.58	£9.24	£10.31	64.0%
5%	£7.88	£9.01	£10.81	£11.65	£13.04	65.5%
5%	£4.62	£5.30	£6.35	£6.85	£7.66	66.1%
45%	£103.94	£118.95	£142.61	£153.66	£171.91	65.4%
-	£225.33	£257.98	£309.43	£333.48	£373.17	65.6%

0%	£280.36	£320.60	£384.09	£413.76	£462.73	65.0%
11%	£505.68	£578.57	£693.53	£747.24	£835.90	65.3%

11%	£505.68	£578.57	£693.53	£747.24		
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APPENDIX 5: RETAIL COMMITMENTS

TABLE 1: NEW RETAIL COMMITMENTS - ESTIMATED CONVENIENCE & COMPARISON GOODS SALES AREAS & BENCHMARK TURNOVERS

	Estimated Sales Area (m ² net)	Average Sales (£ per m ²)	2015 £ million	Estimated Draw from Study Area %	2015 £ million	2020 £ million	2025 £ million	2027 £ million	2031 £ million
CONVENIENCE GOODS FLOORSPEACE COMMITMENTS:									
1 RAILWAY APPROACH, FELIXSTOWE - FOODSTORE (C/12/2395):	2,036	£12,000	£24.4	95%	£23.21	£22.9	£23.0	£23.0	£23.1
2 HAVEN EXCHANGE, FELIXSTOWE - ASDA FOODSTORE (DC/14/2611/FUL):	1,211	£13,000	£15.7	95%	£14.96	£14.8	£14.8	£14.9	£14.9
3 MARTLESHAM RP - M&S SIMPLY FOOD (C/13/1215)	1,151	£11,250	£13.0	45%	£5.83	£5.8	£5.8	£5.8	£5.8
TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPEACE (£m):	4,398		£53.1	83%	£44.0	£43.5	£43.6	£43.7	£43.8
COMPARISON GOODS FLOORSPEACE COMMITMENTS:									
1 RAILWAY APPROACH, FELIXSTOWE - FOODSTORE (C/12/2395):	872	£7,500	£6.5	95%	£6.21	£6.9	£7.7	£8.2	£8.7
2 HAVEN EXCHANGE, FELIXSTOWE - ASDA FOODSTORE (DC/14/2611/FUL):	652	£8,500	£5.5	95%	£5.26	£5.8	£6.5	£6.9	£7.4
3 MARTLESHAM RP - M&S SIMPLY FOOD (C/13/1215)	61	£7,500	£0.5	45%	£0.20	£0.2	£0.3	£0.3	£0.3
3 MARTLESHAM RP - BULKY GOOD RETAIL WAREHOUSE (C/13/1215)	871	£4,000	£3.5	45%	£1.57	£1.7	£1.9	£2.1	£2.2
TOTAL TURNOVER OF COMMITTED RETAIL FLOORSPEACE (£m):	2,455		£16.0	83%	£13.2	£14.7	£16.3	£17.4	£18.6

Notes: (1) Permission for a new foodstore with a gross internal area (GIA) of 5,725 sqm. The scheme is subject to a High Court challenge by Co-Op, and the case is scheduled to start in Autumn 2015. This has caused delay to the development of the store and no operator has been secured. It is assumed that the store will achieve average trading levels comparable to a 'top 6' superstore operator.

(2) Permission was granted for a revised Asda foodstore in 2015. The first application was considered by Committee alongside Railway Approach and a Tesco proposal at Walton Green, but was originally refused on the basis that Railway Approach represented a sequentially preferable approach and allowing a second foodstore in Felixstowe would have a significant adverse impact on the vitality and viability of the town centre and potentially jeopardise the delivery of the Railway Approach permission.

(3) The Council provided CJ with reference to the permission for two Class A1 'bulky goods' units of 2,787 sqm gross at Martlesham Heath. We understand that one unit has been occupied by M&S Simply Food and the second by Brantano.

APPENDIX 6: CONVENIENCE GOODS CAPACITY '*REFRESH*'

TABLE 1: SUFFOLK COASTAL DISTRICT - CONVENIENCE GOODS CAPACITY ASSESSMENT
Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'CURRENT' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m):	£317.8	£329.2	£344.0	£350.4	£363.1
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m) ⁽¹⁾ :	£317.8	£314.0	£314.6	£315.2	£316.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£15.2	£29.4	£35.2	£46.6
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	£0.0	£43.5	£43.6	£43.7	£43.8
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	-£28.3	-£14.1	-£8.5	£2.8
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	-2,384	-1,189	-711	230
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-3,406	-1,699	-1,015	329
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	-4,088	-2,039	-1,218	395
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-5,839	-2,912	-1,740	564

- STEP 1:
- The (survey-derived) 'POTENTIAL' turnovers assume constant market shares over the forecast period (derived from **Appendix 3**).
- STEP 2:
- It is assumed for the purpose of this capacity analysis that the convenience goods retail market is in 'equilibrium' at the base year (in other words the 'potential' turnovers derived from the market share analysis across the defined catchment/study area and the assumed 'inflows' from outside the study area, are assumed to be equivalent to 'benchmark' turnovers). The increase in 'benchmark' turnovers is based on an allowance for growth in the 'productivity' ('efficiency') of all existing and new comparison goods floorspace based on the most recent annual growth rates published by Experian Business Strategies in Retail Planner Briefing Note 12: Addendum (October 2014).
- STEP 3:
- The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.
- STEP 4:
- The turnover of all known commitments has been derived from **Appendix 5**. It is assumed for the purpose of this assessment that all commitments will be opened by 2020 and will have reached 'mature' trading conditions.
- STEP 5:
- The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 4).
- STEP 6:
- The 'net' residual expenditure is converted into a net/gross floorspace capacity estimated based on the assumed higher average sales performance of superstore operators (i.e. Tesco, Asda, Sainsbury's, Waitrose, Morrisons and Marks & Spencer) and the lower average sales performance of smaller supermarkets and discount operators (e.g. Aldi, Lidl, Netto, Co-Op, Budgens, etc.).

TABLE 2: FELIXSTOWE TOWN CENTRE & CAVENDISH PARK DISRICT CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' TURNOVER OF FELXISTOWE TC & CAVENDISH PARK DC (£m):	£54.8	£56.8	£59.5	£60.6	£62.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF FELXISTOWE TC & CAVENDISH PARK DC (£m):	£54.8	£54.1	£54.2	£54.3	£54.5
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):		£2.7	£5.3	£6.3	£8.4
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£37.7	£37.8	£37.9	£38.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£35.0	-£32.5	-£31.6	-£29.7
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	-2,953	-2,737	-2,653	-2,481
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-4,219	-3,909	-3,790	-3,545
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	-5,062	-4,691	-4,548	-4,254
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-7,232	-6,702	-6,497	-6,077

TABLE 3: WOODBRIDGE TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£18.9	£19.6	£20.5	£20.9	£21.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£18.9	£18.7	£18.7	£18.8	£18.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.9	£1.8	£2.1	£2.8
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.9	£1.8	£2.1	£2.8
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	77	148	177	233
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	110	212	253	333
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	132	254	304	400
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	189	363	434	571

TABLE 4: ALDEBURGH TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£2.2	£2.3	£2.4	£2.5	£2.6
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£2.2	£2.2	£2.2	£2.2	£2.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.1	£0.2	£0.3	£0.3
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.1	£0.2	£0.3	£0.3
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	9	18	21	28
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	13	26	31	40
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	16	31	37	49
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	23	44	52	69

TABLE 5: SAXMUNDHAM TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£22.2	£23.0	£24.0	£24.4	£25.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£22.2	£22.0	£22.0	£22.1	£22.2
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£1.0	£2.0	£2.3	£3.1
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£1.0	£2.0	£2.3	£3.1
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	85	164	196	256
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	121	234	279	366
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	145	281	335	439
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	208	402	479	628

TABLE 6: LEISTON TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£12.5	£12.9	£13.5	£13.8	£14.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£12.5	£12.3	£12.4	£12.4	£12.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.6	£1.2	£1.4	£1.9
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.6	£1.2	£1.4	£1.9
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	51	99	118	156
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	73	141	169	223
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	87	169	203	268
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	124	242	289	382

TABLE 7: FRAMLINGHAM TOWN CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£11.4	£11.8	£12.3	£12.6	£13.0
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£11.4	£11.2	£11.3	£11.3	£11.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.6	£1.1	£1.3	£1.7
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.6	£1.1	£1.3	£1.7
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	48	91	108	142
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	68	130	155	203
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	82	156	185	243
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	117	222	265	347

TABLE 8: IPSWICH EASTERN FRINGE OUT OF CENTRE - CONVENIENCE GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£195.7	£202.7	£211.8	£215.7	£223.4
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£195.7	£193.4	£193.8	£194.2	£195.0
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£9.3	£18.0	£21.5	£28.5
STEP 4:	CONVENIENCE GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)		£5.8	£5.8	£5.8	£5.8
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£3.5	£12.2	£15.7	£22.7
STEP 6:	FORECAST CAPACITY FOR NEW SUPERSTORE FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£12,000	£11,857	£11,880	£11,904	£11,952
	(ii) Net Floorspace Capacity (sq m):	0	299	1,028	1,322	1,896
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	427	1,468	1,889	2,708
STEP 7:	FORECAST CAPACITY FOR NEW DISCOUNTER/SUPERMARKET FORMAT FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£7,000	£6,916	£6,930	£6,944	£6,972
	(ii) Net Floorspace Capacity (sq m):	0	512	1,762	2,266	3,250
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	732	2,517	3,238	4,643

TABLE 9: SUFFOLK COASTAL DISTRICT: CONVENIENCE GOODS CAPACITY ASSESSMENT - SUMMARY TABLE

Superstore Format Floorspace - Assumes Equilibrium at Base Year and Constant Market Shares

	2020	2025	2027	2031
FELIXSTOWE TOWN CENTRE & CAVENDISH PARK DISTRICT CENTRE:	-2,953	-2,737	-2,653	-2,481
WOODBIDGE - TOWN CENTRE:	77	148	177	233
ALDEBURGH - TOWN CENTRE:	9	18	21	28
SAXMUNDHAM - TOWN CENTRE:	85	164	196	256
LEISTON - TOWN CENTRE:	51	99	118	156
FRAMLINGHAM - TOWN CENTRE:	48	91	108	142
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	299	1,028	1,322	1,896
SUFFOLK COASTAL DISTRICT: TOTAL CONVENIENCE GOODS CAPACITY	-2,384	-1,189	-711	230

Source: Tables 2-8

APPENDIX 7: COMPARISON GOODS CAPACITY '*REFRESH*'

TABLE 1: SUFFOLK COASTAL DISTRICT - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m):	£225.3	£258.0	£309.4	£333.5	£373.2
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER OF ALL FLOORSPACE IN DISTRICT (£m):	£225.3	£249.5	£277.6	£290.0	£316.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£8.5	£31.8	£43.5	£56.8
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPACE (£m)	£0.0	£14.7	£16.3	£17.4	£18.6
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	-£6.2	£15.5	£26.1	£38.2
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) Net Floorspace Capacity (sq m):	0	-1,120	2,509	4,049	5,441
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-1,601	3,585	5,784	7,773

STEP 1: The (survey-derived) 'POTENTIAL' turnovers assume constant market shares over the forecast period (derived from **Appendix 4**).

STEP 2: It is assumed for the purpose of this capacity analysis that the comparison goods retail market is in 'equilibrium' at the base year (in other words the 'potential' turnovers derived from the market share analysis across the defined catchment/study area and the assumed 'inflows' from outside the study area, are assumed to be equivalent to 'benchmark' turnovers). The increase in 'benchmark' turnovers is based on an allowance for growth in the 'productivity' ('efficiency') of all existing and new comparison goods floorspace based on the most recent annual growth rates published by Experian Business Strategies in Retail Planner Briefing Note 12: Addendum (October 2014).

STEP 3: The forecast residual expenditure capacity (pre commitments) has been derived from Steps 1 and 2.

STEP 4: The turnover of all known commitments has been derived from **Appendix 5**. It is assumed for the purpose of this assessment that all commitments will be opened by 2020 and will have reached 'mature' trading conditions.

STEP 5: The 'net' residual expenditure capacity makes an allowance for the forecast turnover of all known commitments (Step 4).

STEP 6: The 'net' residual expenditure is converted into a net/gross floorspace capacity estimate based on the assumed average sales performance of new (prime) retail floorspace. It should be noted that different comparison goods retailers trade at different average sales levels and this will need to be taken into account when assessing the relative merits and need for different types of retail floorspace.

TABLE 2: FELIXSTOWE TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£55.9	£64.0	£76.9	£82.9	£92.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£55.9	£61.8	£68.8	£71.9	£78.4
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):		£2.2	£8.1	£11.0	£14.4
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)		£12.7	£14.1	£15.1	£16.1
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		-£10.5	-£6.1	-£4.1	-£1.7
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) Net Floorspace Capacity (sq m):	0	-1,905	-984	-631	-239
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	-2,721	-1,406	-902	-342

TABLE 3: WODBRIDGE TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£44.4	£50.8	£60.9	£65.7	£73.5
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£44.4	£49.1	£54.7	£57.1	£62.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£1.7	£6.2	£8.5	£11.1
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£1.7	£6.2	£8.5	£11.1
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
	(i) Estimated Average Sales Density of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) Net Floorspace Capacity (sq m):	0	302	1,012	1,326	1,587
	(iii) Assumed Net / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) Gross Floorspace Capacity (sq m):	-	432	1,446	1,894	2,267

TABLE 4: ALDEBURGH TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£2.4	£2.7	£3.3	£3.5	£3.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£2.4	£2.6	£2.9	£3.0	£3.3
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.1	£0.3	£0.5	£0.6
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.1	£0.3	£0.5	£0.6
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
	(i) ensity of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) space Capacity (sq m):	0	16	54	71	85
	(iii) : / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) rspace Capacity (sq m):	-	23	77	101	121

TABLE 5: SAXMUNDHAM TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£6.3	£7.2	£8.6	£9.2	£10.3
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£6.3	£7.0	£7.7	£8.1	£8.8
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):	£0.0	£0.2	£0.8	£1.1	£1.5
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)		£0.0	£0.0	£0.0	£0.0
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:		£0.2	£0.8	£1.1	£1.5
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
	(i) ensity of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) space Capacity (sq m):	0	38	135	178	212
	(iii) : / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) rspace Capacity (sq m):	-	55	194	254	302

TABLE 6: LEISTON TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2015	2020	2025	2027	2031
STEP 1: TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£7.9	£9.0	£10.8	£11.7	£13.0
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£7.9	£8.7	£9.7	£10.1	£11.1
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):		£0.3	£1.1	£1.5	£2.0
STEP 4: COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	£0.3	£1.1	£1.5	£2.0
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
(i) ensity of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
(ii) space Capacity (sq m):	0	53	180	235	282
(iii) : / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) rspace Capacity (sq m):	-	75	256	336	403

TABLE 7: FRAMLINGHAM TOWN CENTRE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

	2015	2020	2025	2027	2031
STEP 1: TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£4.6	£5.3	£6.4	£6.8	£7.7
STEP 2: TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£4.6	£5.1	£5.7	£5.9	£6.5
STEP 3: NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):		£0.2	£0.7	£0.9	£1.2
STEP 4: COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)	£0.0	£0.0	£0.0	£0.0	£0.0
STEP 5: NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	£0.2	£0.7	£0.9	£1.2
STEP 6: FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
(i) ensity of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
(ii) space Capacity (sq m):	0	33	108	141	169
(iii) : / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
(iv) rspace Capacity (sq m):	-	48	155	202	241

TABLE 8: IPSWICH EASTERN FRINGE - COMPARISON GOODS CAPACITY ASSESSMENT

Assume Equilibrium at Base Year and Constant Market Shares

		2015	2020	2025	2027	2031
STEP 1:	TOTAL FORECAST 'POTENTIAL' (SURVEY-DERIVED) TURNOVER (£m):	£103.9	£118.9	£142.6	£153.7	£171.9
STEP 2:	TOTAL FORECAST 'BENCHMARK' TURNOVER (£m):	£103.9	£115.1	£128.1	£133.8	£145.9
STEP 3:	NET RESIDUAL EXPENDITURE - EXCLUDING ANY COMMITMENTS (£m):		£3.9	£14.5	£19.9	£26.0
STEP 4:	COMPARISON GOODS TURNOVER OF ALL COMMITTED FLOORSPEACE (£m)	£0.0	£2.0	£2.2	£2.3	£2.5
STEP 5:	NET RESIDUAL EXPENDITURE AFTER COMMITMENTS:	£0.0	£1.9	£12.4	£17.6	£23.5
STEP 6:	FORECAST CAPACITY FOR NEW COMPARISON GOODS FLOORSPEACE:					
	(i) Density of New Floorspace (£ per sq m):	£5,000	£5,537	£6,161	£6,435	£7,020
	(ii) space Capacity (sq m):	0	342	2,005	2,729	3,346
	(iii) : / Gross Floorspace Ratio:	70%	70%	70%	70%	70%
	(iv) space Capacity (sq m):	-	488	2,864	3,899	4,780

TABLE 9: SUFFOLK COASTAL DISTRICT: COMPARISON GOODS CAPACITY ASSESSMENT - SUMMARY TABLE

Assume Equilibrium at Base Year and Constant Market Shares

	2015	2020	2025	2027	2031
FELIXSTOWE TOWN CENTRE:	-	-1,905	-984	-631	-239
WOODBIDGE - TOWN CENTRE:	-	302	1,012	1,326	1,587
ALDEBURGH - TOWN CENTRE:	-	16	54	71	85
SAXMUNDHAM - TOWN CENTRE:	-	38	135	178	212
LEISTON - TOWN CENTRE:	-	53	180	235	282
FRAMLINGHAM - TOWN CENTRE:	-	33	108	141	169
IPSWICH EASTERN FRINGE - OUT OF CENTRE:	-	342	2,005	2,729	3,346
SUFFOLK COASTAL DISTRICT: TOTAL COMPARISON GOODS CAPACITY	-	-1,120	2,509	4,049	5,441

Source: Tables 2-8