# Ipswich Borough & Suffolk Coastal District

# Retail and Commercial Leisure Town Centre Study

## October 2017

### Executive Summary



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IPSWICH BOROUGH COUNCIL

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## Context

1. WYG Planning ('WYG') was commissioned by Ipswich Borough Council (IBC) and Suffolk Coastal District Council (SCDC) in December 2016 to undertake a Joint Retail and Commercial Leisure Town Centre Study for the Council areas. The key purpose of this Study is to act as the evidence base to assist in the formulation of future development plan policy, as well as providing baseline information to assist in the determination of planning applications for retail and leisure development.

2. This Study will be used to inform the emerging aligned Local Plan Reviews for the two authorities. The authorities are embarking upon the production of aligned Local Plan Reviews covering the period 2016-2036, alongside neighbouring Babergh and Mid Suffolk District Councils.

3. The requirements of a Retail and Leisure Study are set out within the National Planning Policy Framework (NPPF). Paragraph 23 provides guidance for local planning authorities in drawing up Local Plans, which refers to a number of criteria in order to promote the vitality and viability of towns and cities. This Retail and Leisure Study provides the appropriate evidence base to deliver the identified criteria.

## Current and Emerging Retail/Leisure Trends

4. The Study identifies that the town centres in the two council areas face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing, change within the centre away from A1 retail use, and out-of-centre retail/leisure developments. These challenges will impact on the future strategy for the town centres. It is important for town centres in the two council areas to be able to respond to continued changes in the retail and leisure sector and to provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

5. The Study advises that Town Centre Strategies in the two Council areas need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. Such strategies may seek to:

   (1) provide a good mix/variety of retail and leisure uses;

   (2) attract a mix of additional land uses, including residential and offices;

   (3) build on existing cultural/heritage/tourist attractions;

   (4) enhance existing town centre markets and speciality retailing;

   (5) provide a high quality shopping/leisure experience;

   (6) ensure an appropriate supply of hotel rooms in the right locations to encourage tourist and business stays;

   (7) provide convenient, affordable and accessible town centre parking;

(8) promote and encourage events in the town centre;

(9) embrace, and not compete against, multi-channel retailing; and

(10) be responsive to changes in technology (the 'digital high street').

6. The key purpose of Town Centre Strategies should be to seek to extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

## Market Research

7. The study is informed by three key areas of original market research comprising a Telephone Household Survey, a Hotel Managers Survey and key stakeholder engagement.

8. A key requirement of the study is to understand shopping and leisure patterns in terms of the use of centres and the identification of centre catchment areas. WYG commissioned specialist market researchers NEMS to undertake a comprehensive household telephone survey to identify shopping/leisure habits and preferences in the Study Area.

9. A Hotel Managers Survey was commissioned to inform both the quantitative and qualitative hotel needs assessment. The hotel manager's survey intended to establish details of existing hotels in the two council areas including information on: room numbers, car parking spaces, average room rate, facilities, occupancy levels and any future plans.

10. Engagement was undertaken with key stakeholders in the two Council areas to inform the qualitative analysis and assist in establishing views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision; and suggested improvements to the defined centres.

11. Engagement was also undertaken with a number of retail, leisure and hotel operators (or agents acting on their behalf) to understand current demand/interest in town centres and potential opportunities in Ipswich and other market towns.

## Retail Patterns

12. This Study identifies that the Study Area as a whole has a varied socio demographic profile. Ipswich Borough itself has a higher proportion of residents within lower grade categories but contains a higher proportion of aspiring young families/singles. Suffolk Coastal District, primarily due to the fact that a large proportion of the district is rural in nature, has a significantly higher proportion of residents in socio demographic categories relating to country/rural living.

13. In terms of the sub-regional centre hierarchy it is evident that Ipswich, classified as a 'Regional Centre', has not only maintained its position but has seen a slight improvement in its ranking over the last 7 years. It is ranked higher than the nearest larger centres of Chelmsford, Colchester and Bury St Edmunds which clearly demonstrates its strength in the sub-region. In the Suffolk Coastal district area, the highest ranked

centre, Felixstowe Town Centre, classified as a 'Major District Centre', has also seen an improvement in its rankings. Woodbridge Town Centre, primarily due to the lower provision of national multiple retailers, sits below Felixstowe in the rankings.

14. The household survey findings identify that Ipswich Town Centre is competing well against the surrounding main centres. Current shopping retention levels are good and have improved over the last 10 years. Whilst Ipswich draws retail expenditure from residents residing in the Suffolk Coastal district area this is to be expected given the sub-regional role and catchment of the town centre. The Study concludes, given the location of Ipswich and the size, role and provision of facilities in the towns in Suffolk Coastal district, retention levels in the districts town centres are also considered to be good and not a cause for concern.

15. The majority of the surrounding large main towns outside the two administrative areas either have aspirations/allocations/new developments for retail/leisure development or have planning permission for retail/leisure development in the town centre. The Study identifies that it is important that the town centres in the two council areas, in particular Ipswich Town Centre, do not stand still if they are to continue to compete effectively against other town centres. Otherwise, planned improvements in other centres could potentially materially impact upon the future performance and overall vitality and viability of centres.

## Centre Vitality and Viability

16. The Study has evaluated the vitality and viability of Ipswich Town Centre and District Centres and the Suffolk Coastal Market Towns of Woodbridge, Felixstowe, Saxmundham, Framlingham, Leiston and Aldeburgh.

- Ipswich Town Centre – is performing reasonably well and is considered to display reasonably good levels of vitality and viability, despite the significant level of out-of-centre retail and leisure floorspace. The centre contains a good variety of both national and independent traders and accommodates 26 of the 29 Experian Goad defined top comparison goods retailers. In addition, there is a good level of demand from a mix of national multiple retail and commercial leisure operators seeking representation in the town. However, the town centre lacks a high-quality department store and higher brand (premium) comparison goods retailers, although it was noted, despite the relatively high vacancy rates, there are a lack of available units/sites in the prime shopping area capable of meeting national multiple occupiers' requirements for large floorplate units.
- Woodbridge Town Centre – is considered to be vital and viable with a good and mixed comparison goods offer provided through both national and independent occupiers, although it was noted the centre lacks a larger foodstore to meet the full requirements of a main food shop.

- Felixstowe Town Centre – displays healthy levels of vitality and viability as demonstrated by its low vacancy level. It provides a reasonably good convenience offer and there is a good variety and range of national multiple retailers and independent comparison goods retailers, albeit the town centre lacks a department store, partly due to size of existing units and location of nearby facilities in Ipswich.
- Saxmundham Town Centre – is considered to be a healthy centre displaying a low vacancy rate and containing a strong convenience goods offer. The regeneration of the area around the railway station provides the opportunity to improve the environmental quality in this part of the centre and linkages to the centre.
- Aldeburgh Town Centre – presents a different shopping and leisure offer to the other Suffolk Coastal Market Towns due to its strong tourism offer. The environment of the centre is attractive and it boasts a very low vacancy level and good churn rate. Overall, the centre is considered to be healthy.
- Framlingham Town Centre – is considered to be vital and viable. It has an attractive environment with a number of historic buildings and provides a good convenience retail offer through the Co-op foodstore. The centre has a very low vacancy rate, although it has lost two public houses in recent years. The further loss of public houses in the centre could be detrimental to the evening economy.
- Leiston Town Centre – is considered to be healthy although the environmental quality could be improved. The development site on the High Street, identified in the Leiston Neighbourhood Plan, provides an opportunity to enhance the centre and improve pedestrian circulation.

## Retail Needs Assessment

17. The Study provides an assessment of retail needs and considers both convenience and comparison goods quantitative needs (retail capacity) as well as reviewing qualitative retail needs having regard to any identified deficiencies / ‘gaps’ in existing provision.

### Ipswich Borough

18. The study identifies a significant level of comparison goods floorspace capacity for Ipswich Borough in the period up to 2036. This comprises between 34,800-63,700sq m net, excluding Copdock/Interchange, and between 36,700-67,200sq m net including Copdock/Interchange. For convenience goods, there is an identified quantitative need for between 1,600-2,100sq m net floorspace in the Borough. The study does not identify any capacity for convenience goods capacity at Copdock/Interchange and therefore no capacity redistribution is required.

19. In terms of convenience goods, the town centre currently lacks a foodstore facility capable of being able to offer a full main-food shop. It is noted in the study that Aldi currently have a published requirement for a new circa 2,000sq m gross store in Ipswich which could potentially assist in meeting this qualitative deficiency. Notwithstanding this, given that flat dwellers in the town centre generally undertake a number of smaller basket shops in the week (rather than a weekly trolley shop) the lack of a large foodstore in the town centre is not considered to be materially harmful to the vitality and viability of the town centre.

20. In terms of comparison goods provision, the Study identifies that the town centre has strengthened its market share of comparison goods expenditure since 2010 (+5% (from 57%)) and 2005 (+13% (from 49%)) and is competing well against surrounding centres and out-of-centre retail facilities. Whilst the town centre is considered to provide a good variety of national multiple and independent retailers, and there is evidence of retailer/investor confidence and retailer demand in the town centre, the centre lacks a high-quality department store and its offer of higher brand national multiple comparison retailer is limited.

21. The Study recommends that the Council should seek to improve Ipswich Town Centre's comparison goods market share by way of: qualitative improvements including, *inter alia*, improvements to the existing retail stock (to attract a greater number of higher quality retailers); town centre environmental improvements; and implementing a marketing strategy.

## Suffolk Coastal District

22. Woodbridge and Felixstowe are identified in the study, to have the highest level of comparison goods capacity over the plan period and should be the main focus for future comparison goods shopping provision.

**Figure E.1: Quantitative Retail Capacity Summary – Suffolk Coastal District (within plan period (2036))**

| Sector | Woodbridge | Felixstowe | Saxmundham | Aldeburgh | Framlingham | Leiston | Ipswich Eastern Fringe |
|---|---|---|---|---|---|---|---|
| Convenience Goods (sq m net) | 400 | Nil | 800-1,000 | Nil | 400 - 500 | 100 | 2,400-3,000 |
| Comparison Goods (sq m net) | 3,500-5,800 | 2,000-3,400 | 700-1,200 | 300-500 | 500-900 | 500-900 | 200-400 |

*Notes: Quantitative Capacity figures are post commitments/planning permissions.*

23. For convenience goods, limited capacity is identified for each centre (based on current market shares). In terms of the capacity identified for Saxmundham, given current shopping patterns the study considers a proportion of the capacity should be met in both Aldeburgh and Framlingham. However, it is considered that it is very unlikely that either town would be able support a further main foodstore facility which would be capable of clawing back expenditure spent at the large Tesco and Waitrose stores in Saxmundham.

24. The retail capacity identified for Ipswich Eastern Fringe area, in accordance with the sequential approach to site selection, should be directed to centres first. The centres not only include Woodbridge and Felixstowe, but also, as the sub-regional centre, Ipswich Town Centre. Convenience goods shopping provision of an appropriate scale should also considered to be included in any potential new district/local centres in the Ipswich eastern fringe.

25. In terms of qualitative need the study identifies:

- Woodbridge Town Centre – The limited existing foodstore provision in the town and the shopping patterns indicate that there is a currently a foodstore qualitative deficiency in the town. Furthermore, having regard to the existing comparison goods provision in the town centre and the towns comparison goods retention levels there are currently no comparison goods qualitative deficiencies in the town centre.
- Felixstowe Town Centre – There is no qualitative need for additional convenience goods foodstore provision in the town centre. In terms of comparison goods whilst the town centre lacks a department store it is unlikely that the town centre will be attractive to a department store operator for the foreseeable future.
- Saxmundham Town Centre – Given the existing two large foodstore in the town centre there is no qualitative need for an additional convenience goods foodstore in the town centre. Furthermore, given its size and role, there is currently a qualitative need for a material increase in comparison goods retail provision in the town centre.
- Aldeburgh Town Centre – Having regard to existing comparison goods provision in the town centre and its role/size there is no qualitative deficiencies in comparison goods retailing. Whilst there is a qualitative deficiency in main-food provision in the town, given the size and population of Aldeburgh and its catchment area, the town is unlikely to be able to support a further main foodstore facility.
- Framlingham Town Centre – Having regard to the size of the town, its catchment population and existing convenience and comparison goods provision there is currently no qualitative need for additional convenience or comparison goods floorspace in the town centre.
- Leiston Town Centre – As with Aldeburgh, whilst there is a qualitative deficiency in main-food provision in the town centre, given the size and population of Leiston and its limited catchment area, it is very unlikely that the town could support a further main foodstore facility. The 'Land at High Street' redevelopment site will provide sufficient opportunity to improve the range of comparison goods retail facilities in the town centre in the plan period.

## Commercial Needs Assessment

26. For each commercial leisure sector, the study considers the current broad patterns of existing use and then assesses the need for additional facilities.

## Ipswich Borough

27. Having regard to the planned restaurant and café/coffee shop provision along the Waterfront and the existing provision in Ipswich Town Centre, in identifying future floorspace capacity projections, the study makes an allowance for an increase in Ipswich Town Centre/Waterfront market share. The study identifies that there is a potential restaurant and café/coffee shop floorspace requirement of 4,231sq m net within the plan period.

28. In qualitive terms, whilst, primarily as a result of The Buttermarket Shopping Centre redevelopment, restaurant and café/coffee shop provision in the town centre has significantly improved recently there are a still a number of national food and drink operators not present. The study identifies, given the existing provision, retention levels and outstanding requirements from operators, there is a qualitative need to improve restaurant and café/coffee shop provision in the town centre. Notwithstanding this, in the Primary Shopping Frontage Zone the focus should be on A1 uses first. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and also the Waterfront area.

29. The study has not identified a general qualitative deficiency in existing indoor sport/health and fitness facilities in the borough and there are no current requirements from sports/health and fitness operators. However, there is assessed to be capacity for between 5-7 new additional facilities in the plan period, based on current participation rates.

30. There is no quantitative or qualitative need for additional cinema, bingo or ten-pin bowling provision in Ipswich over the plan period. This is due to the recent opening of the 14 screen Empire Cinema in the Buttermarket Shopping Centre and the planned opening of the Superbowl UK bowling alley. The study identifies Mecca Bingo have a requirement to open a new high street online format store in Ipswich Town Centre.

31. The study finds Ipswich sustains a good number of cultural facilities and the available evidence identifies that there is no current requirement for new cultural facilities in Ipswich. However, it is recommended that in order to maintain and improve current participation rates, and help increase the number of visitors to the venues/area, consideration should be given to ways of further promoting existing facilities and improving marketing. In terms of arts and cultural activities (theatres and museum/art facilities), the Study identifies that existing provision of the district's towns is of a scale which is appropriate to their role in the hierarchy. Additional provision is likely to reflect particular opportunities related to distinct locations and the existing cultural tourism offer.

## Suffolk Coastal District

32. The study identifies that Woodbridge and Felixstowe have the most identified restaurant & café/coffee shop capacity over the plan period, with requirements as below in Figure E.2 below.

**Figure E.2: Quantitative Leisure Capacity Summary – Suffolk Coastal District (within plan period (2036))**

| Sector | Woodbridge | Felixstowe | Saxmundham | Aldeburgh | Framlingham | Leiston | Ipswich Eastern Fringe |
|---|---|---|---|---|---|---|---|
| Restaurant & Café/ Coffee Shop (sq m net) | 1,000 | 600 | 200 | 170 | 130 | 50 | - |
| Health & Fitness (No.) | 5-7 gyms (within Suffolk Coastal district) | | | | | | |
| Cinema (No.) | 1-2 screens (within Suffolk Coastal District) | | | | | | |
| Bingo (No.) | Nil | | | | | | |
| Tenpin Bowling (No.) | Nil | | | | | | |

*Notes: Quantitative Capacity figures are post commitments/planning permissions.*

33. Whilst the Study identifies that there isn't a general qualitative deficiency in existing indoor sport/health and fitness facilities in the district, and currently no requirements from sports/health and fitness operators, based on the current rates of participation, there is assessed to be capacity for between 5-7 new additional facilities in the plan period. Having regard to existing market share patterns the study recommends that the council should consider additional provision in central locations in the towns of Woodbridge and Felixstowe.

34. In terms of the identified cinema needs for the district, the study considers that there is no requirement for qualitative improvements in cinema provision in the district. Existing cinema facilities provide sufficient provision for the district population. The study also identifies there is no identified needs for additional bingo and tenpin bowling facilities in the district, the existing facilities meet with existing and projected requirements.

35. In terms of arts and cultural activities (theatres and museum/art facilities), the Study identifies that existing provision of the district's towns is of a scale which is appropriate to their role in the hierarchy. Again additional provision is likely to reflect particular opportunities related to distinct locations and the existing cultural tourism offer.

## Hotel Needs Assessment

### Ipswich Borough

36. The Study reports that the hotel market in Ipswich has seen a significant uplift in room numbers in the last 5 years, far in excess of the average growth rates in the UK. The growth in room numbers has been heavily biased towards the budget market. This may to some extent reflect Ipswich 'catching up' from a

low base point and explain the current occupancy rates of 68%. The assessment of the hotel market, considers the prospects for future hotel development in Ipswich to be promising.

37. Ipswich's occupancy levels at 68% are lower than the national average and can possibly be explained due to the rapid expansion of hotel room numbers in recent years. This suggests that there is capacity in the existing market to accommodate additional visitors/growth (particularly at the weekend when occupancy levels are lower (60-65%)), albeit there would appear to be limited capacity at peak times (mid-week (78% occupancy levels) and peak holiday season). The occupancy levels also partly explain the limited number of exiting hotels looking to extend room numbers on their sites.

38. The Study anticipates there being opportunities for the development of further hotels over the plan period both in the short and medium term. In the short term, interest would appear to be in providing rooms in the 3* standard with varying levels of service, but accompanied by a food and drink offer. Developers would appear to be interested in any form of delivery to provide around 100 rooms. Given the large number of hotels already located on the primary road network, locations in the town with easy access to services, facilities and amenities including the Waterfront, would seem to be the most appealing options.

39. The Study identifies that the budget market is well provided for in Ipswich and there would appear to be limited capacity for further growth in this part of the market at this point. There is however a clear gap in the hostel sector, with no such provision in the Ipswich area. There is also a more limited provision of 4* hotels and no 5* provision. As such, the Study reports there may also be opportunities for higher quality provision, particularly in small scale boutique style establishments.

40. Projecting historic growth rates forward, and taking account of the existing EasyHotel commitment, suggest a potential need for a further 342 rooms over the plan period. The Study notes that these projections should be treated with caution and given the growth agenda for Ipswich it is possible that demand for hotel rooms may exceed the projections identified.

### Suffolk Coastal District

41. The Study assesses that the Suffolk Coastal district hotel market is more settled and reported occupancy rates of 74% which is at a level which suggests there is capacity to support additional hotel bedrooms. Denials are also common in Suffolk Coastal at the weekend. Notwithstanding this, the Study finds there appears to be very limited interest for developers and operators. The Suffolk Coastal area however has a limited supply of budget hotels, all of which are provided by independent operators with the exception of the Premier Inn in Felixstowe. There would therefore appear to be some scope for further representation in this market in the short-medium term. This is reflected in the known requirements from national operators looking at Felixstowe and Woodbridge.

42. There are similar numbers of 3* and 4* hotels in Suffolk Coastal with both being well provided for. Notwithstanding the attractive rural setting of the district, there are few leisure/spa resorts. This would appear to be an area for potential growth and could be linked with 5* provision given there are no such hotels in Suffolk Coastal. Projecting historic growth rates forward would suggest a need for a further 268 rooms over the plan period.

## Assessment of Potential Development Sites

43. The Study provides 'high level' assessments of the availability and suitability of 19 sites within central Ipswich that could potentially support identified needs for new retail and/or commercial leisure floorspace over the emerging plan period (to 2036).

44. The study finds that the identified capacity for A1 convenience goods retail, food and drink, health and fitness, and hotel provision for Ipswich could potentially be accommodated within the sites. However, the study assesses that the sites are only potentially capable of accommodating up to 19% of the minimum identified comparison goods retail capacity needs.

45. Out of the 19 sites assessed the Mint Quarter site (Site 13) is identified as the only centrally located site capable of accommodating large scale comparison goods retail capacity. The only other centrally located site that could physically accommodate a good level of comparison goods floorspace is the Westgate Site (Site 12). However, the owners of the site are currently marketing it (excluding residential on Black Horse Lane) for residential-led mixed use development with a limited amount of retail and is therefore now unlikely to be available for large scale retail development.

## Recommendations

46. The study identifies that overall Ipswich Town Centre and town centres in the Suffolk coastal district provide a complimentary role and the level of retail and leisure retention rates are appropriate given their respective size and roles. Whilst Ipswich draws retail and commercial leisure expenditure from residents residing in the Suffolk Coastal district area this is to be expected given the sub-regional role and catchment of the town centre.

### Ipswich Borough

#### Network of Centres

47. This Study identifies that Ipswich Town Centre continues to perform as an important town centre. The town centre provides a sub-regional role serving a wider area than the borough itself. The town centre is competing well against the surrounding main centres with good and improved shopping retention levels. It remains the 3rd strongest centre in the region and whilst ranked behind the larger centres of Norwich and Cambridge, remains higher than Colchester, Chelmsford and Bury St Edmunds. Accordingly, the Study support the retention of Ipswich Town Centre as a defined town centre.

48. In terms of the district centres in the borough, notwithstanding the varying sizes of the centres, the Study advises that each performing the role of a district centre and also, importantly, serve a complimentary role to Ipswich Town Centre.

**Local Retail Impact Assessment Threshold**

49. The Study proposes separate local retail impact requirement thresholds for Ipswich Town Centre and the district centres. For Ipswich Town Centre, the study recommends that a reasonably conservative threshold of 750sq m gross (525sq m net (adopting 70/30% gross/net floorspace split)) should be adopted. For the district centres within the Borough, the study recommends that the existing adopted 200sq m net (280sq m gross (70%/30% gross/net floorspace split)) threshold is maintained.

**Town Centre & Shopping Frontages**

50. Ipswich Town Centre's existing centre boundary and shopping frontages are reviewed in the Study. The recommended boundaries and frontage zones largely corresponds with those defined in the adopted Local Plan. There are minor changes recommended to the Town Centre boundary in relation to curtailing the boundary to the east to exclude land to the east of The Regent Theatre Car Park and Bond Street (primarily residential area). The Primary Shopping Frontage Zone (PSFZ) is recommended to be extended marginally to include the following areas, currently identified as Secondary Shopping Frontage Zone (SSFZ), the western and eastern end of Buttermarket, western side of Upper Brook Street and the Town Hall and Lloyds building on Corn Hill. The SSFZ is amended in line with the changes to the PSFZ and extended to include Mecca Bingo on Lloyds Avenue, upper end of Princes Street and Northgate Street and Great Colman Street. The Specialist Protection Shopping Frontage Zone is recommended to extend to include the middle part of Upper Orwell Street and exclude the above areas moved to SSFZ.

**Future Retail and Commercial Leisure Strategy**

51. The key issue facing the town centre is the current lack of available units/sites in the primary shopping streets able to meet with current and potential future requirements/demands (particularly retail). With the exception of the Mint Quarter and Westgate site there are no other centrally located site that could physically accommodate a good level of comparison goods floorspace. The owners of the Westgate site are currently marketing it for residential-led mixed use development with a limited amount of retail (2,047sq m gross), A3 (165sq m gross) and Cultural (365sq gross) uses. The site is therefore now unlikely to be available for large scale retail development. Should there not be any other sites within Ipswich Town Centre capable of accommodating the identified needs, in accordance with the NPPG, having regard to both the sequential approach and retail impact tests, sites outside the town centre will need to be considered.

52. We recommend that the Council should prepare a town centre strategy for Ipswich. The strategy needs to be able to support the continued development/changes in the 'high street' if it is to successfully compete. The recommended key elements to the town centre strategy, as a result of the findings of the Study, are set out below:

- Review unit opportunities in the town centre primary shopping area for retail use which should include an assessment of whether it would be possible to amalgamate existing units/ accommodation.
- Follow up, where necessary, the initial site assessment work undertaken as part of this Study with detailed site assessments, involving land owners and other consultees, to obtain a full understanding of their availability and suitability to meet the retail and commercial needs identified in this study.
- Given the apparent limited site opportunities for large scale retail development close to the primary shopping streets promote the Mint Quarter site for retail-led mixed-use development.
- Identify sufficient centrally located sites in the town centre to positively harness the economic benefits of the hotel sector, ensuring the supply of hotel bed spaces support the continued drive for growth and the vitality of the town centre.
- Continue to engage with landowners and interested parties in seeking to bring forward potential development sites which help enhance/improve the linkages between the primary shopping streets in the town centre and the Waterfront. The potential remodelling of the Star Lane/College Street, which acts a physical barrier, will be important to the 'master planning' of this area.
- Proactively engage with: (1) the various retailer, leisure and hotel operators who currently have outstanding requirements to open new premises in Ipswich Town Centre; and (2) owners of available vacant properties in the town centre (including the former BHS unit and former Odeon cinema).
- Maintain, and where possible strengthen, the town centre's independent/specialist retail/service offer.
- Prioritise A1 uses in the Primary Shopping Frontage Zone. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and the Waterfront area.
- Continue to focus on the redevelopment of the Waterfront for a mix of uses including food and drink at ground floor level.
- Undertake a town centre public realm improvement study to seek to address those areas of the town centre that would benefit from new higher quality paving, street furniture and soft landscaping [currently being undertaken].
- Undertake a Parking Study for Ipswich Town Centre to assess whether the provision of car parks in the town meets with current and future demand [currently being undertaken].

- Undertake an assessment of the town centre market to understand its use and role and whether there are potential opportunities to improve its retail offer [currently being undertaken].

- Investigate further initiative to build on the arts and cultural attractions within the centre, particularly on the Waterfront.

- Develop a marketing strategy to seek to improve the perception of the town centre and help increase the number of higher brand retailers and the number of visitors to the venues/town centre.

53. It will be important to promote not just the further expansion of the retail and leisure offer in the town centre but also seek to qualitatively distinguish the town centre and wider area. As a potential significant tourist/visitor asset, the Waterfront will be critically important in developing a holistic approach to firstly maintaining but secondly enhancing its sub-regional profile and attractiveness.

54. The importance of the active key stakeholders within Ipswich Town Centre is recognised by the Study and recommends that the Council continues to work with its partners and relevant landowners to deliver development opportunities in the town centre to meet the identified retail and commercial leisure needs.

## Suffolk Coastal District

### Network of Centres

55. The Study recommends that the Council retain Felixstowe, Woodbridge, Saxmundham, Aldeburgh, Leiston and Framlingham as town centres. The remit of the study did not include a review of lower ordered centres.

### Local Retail Impact Threshold

56. In terms of advising on the local retail impact assessment threshold, the Study recommends a threshold of 750sq m gross for the larger retail centres of Woodbridge and Felixstowe. For the smaller market town centres in the district, the study recommends a lower threshold of 350sq m to ensure that the vitality and viability of the centres would not be significantly impacted upon.

### Town Centre & Shopping Frontages

57. The study also provides recommendations on the town centre boundaries and shopping frontages of each of the market towns within the District. Figure E.4 below summarises the recommendations.

**E.4 – Recommended Suffolk Coastal Town Centre Boundaries and Shopping Frontages**

| Town | Comments/Recommendations |
|---|---|
| Woodbridge | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No PSA defined in 2001 Local Plan. Recommended PSA extends to St Johns Street to the east, northern part of Quay Street, eastern part of Cumberland Street and includes Mark Hill to the north.<br>- Primary Shopping Frontage - PSF (identified as Prime Shopping Area in 2001 Local Plan) extended to the north on Thoroughfare and also includes Costa Coffee and Laura Ashley on the Thoroughfare.<br>- Secondary Shopping Frontage - No SSF defined in 2001 Local Plan. Recommended SSF shown on plan at Appendix V. Includes Market Hill, northern end of Thoroughfare, part of New Street, Cumberland Street and Quay Street. |
| Felixstowe | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - extension to include retail and commercial units on Orwell Road.<br>- Primary Shopping Frontage - minor extension to the north to include Great Eastern Square.<br>- Secondary Shopping Frontage - extension to include retail and commercial units on Orwell Road. |
| Saxmundham | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No changes required.<br>- Primary Shopping Frontage - Extension to include Market Place.<br>- Secondary Shopping Frontage - Inclusion of Waitrose and exclusion of Market Place, and minor corrections on Church Street. |
| Aldeburgh | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - Curtailed to the north to extend only as far as The Aldeburgh Sweet Shop (75 High Street). Properties beyond on predominantly residential.<br>- Primary Shopping Frontage - Extended to include 100-124 High Street (currently shown as SSF).<br>- Secondary Shopping Frontage - Extended to include retail/commercial properties on west side of the High Street (from Town Steps to 75 High Street). |
| Framlingham | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No PSA defined in Neighbourhood Plan. Recommended PSA extends to the western part of Church Street and Well Close Square to the west. Include Market Hill, Bridge Street and Riverside<br>- Primary Shopping Frontage - No PSF defined in Neighbourhood Plan. Recommended PSF includes Market Hill, The Old Mews and includes the Co-op.<br>- Secondary Shopping Frontage - No SSF defined in Neighbourhood Plan. Recommended SSF predominately to the west of the Co-op store and also includes 3-6 Church Street. |
| Leiston | - Town Centre Boundary - No changes required. Correctly includes mixed use allocation land at High Street (Policy TC2).<br>- Primary Shopping Area - No PSA defined in Neighbourhood Plan. Recommended PSA extends to 46A Sizewell Road to the east, 104 High Street to the south, 19 Main Street to the north, and the very eastern part of Cross Street.<br>- Primary Shopping Frontage - No PSF defined in Neighbourhood Plan. Recommended PSF includes the Co-op and western part of Sizewell Road and the units on High Street as far as 10-12 High Street to the north and 70 High Street to the south.<br>- Secondary Shopping Frontage - No SSF defined in Neighbourhood Plan. Recommended SSF includes properties at the northern part of the High Street and in the vicinity of the High Street car park to the south. |

*PSA = Primary Shopping Area / PSF = Primary Shopping Frontage / SSF = Secondary Shopping Frontage*

**Future Retail and Commercial Leisure Strategy**

58. The Study advises that town centre strategies in the district council area need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. The key purpose of the town centre strategies should be to seek to extend the 'dwell time' and spend of visitors/residents

visiting the town centre and in turn the vitality and viability of the centre. The recommended key elements to each town centre strategy set out in the Study are:

**Woodbridge Town Centre**

- Maintain, and where possible strengthen, the town centre's independent/specialist and premium brand retail offer.
- Identify a suitable site for a foodstore which is capable of meeting main-food shopping needs. If a site within or on the edge of the town centre cannot be identified it will be important to take into account the potential impact on the town centre anchor Co-op store if out-of-centre sites are considered.
- Identify a suitable site for a budget hotel.
- Plan for an additional Indoor health and fitness facility in the town centre.
- Strengthen the existing pedestrian linkages between the town centre and waterfront.

**Felixstowe Town Centre**

- Maintain, and where possible, strengthen the town centre's mix of independent and multiple retailers. Independent/specialist and premium brand retail offer.
- Investigate site/unit opportunities to meet the commercial leisure and retail needs identified in this study (which includes additional comparison goods and food and drink floorspace, a new budget hotel, and an Indoor health and fitness facility).
- Undertake a design/highways assessment to investigate the potential to extend the shared town centre vehicular/pedestrian space.
- Strengthen the relationship between the town centre and seafront to increase the number of linked trips.

**Saxmundham Town Centre**

- Identify site/unit opportunities to meet the identified (albeit relatively limited) comparison goods and food and drink needs.
- Investigate ways to improve the pedestrian linkage between the town centre and the railway station.
- Undertake highways investigative work of The High Street/Church Street junction to help improve the environmental quality of this part of town centre.

- Undertake site investigative and analysis work of the area around the railway station.

**Aldeburgh Town Centre**

- Given the very low vacancy rate (2 units), identify potential site/unit opportunities to meet the identified (albeit limited) retail and food and drink needs.
- Undertake annual monitoring composition checks of the centre to make sure the town centre continues to provide the right balance in local shops/services and services catering for the visitor market.
- Investigate further initiatives to build on the arts and cultural attractions within the centre.
- Undertake a car parking review to establish car parking requirements and investigate potential options for car park and traffic circulation improvements.

**Framlingham Town Centre**

- Undertake an assessment to establish whether there are any potential sites/units within and on the edge of the town centre (including the vacant former White Horse pub) capable of accommodating the identified retail and leisure needs.
- Consider the potential to further enhance the relationship/linkage between the Castle and the town centre.
- Undertake a review of the town centre market to ascertain whether there are potential opportunities of enhancing/promoting it.
- Undertake a car park capacity assessment to review whether there is sufficient town centre car parking provision.

**Leiston Town Centre**

- Promote the delivery of the potential mixed-use development of land at High Street (identified in the Leiston Neighbourhood Development Plan).
- Undertake annual monitoring composition checks of the centre to monitor the number and type of units (in particular the number of charity shops).
- Consider whether there are potential future opportunities to assist in increasing the number of clothing and footwear outlets in the town centre.

- Undertake an assessment to consider potential opportunities to improve the overall environmental quality of the centre including whether through traffic could be reduced and narrow pavements widened.

59. The Study advises that the Council, in partnership with its stakeholders, should continue to promote the town centres within the district (particularly through the internet) as places to shop, play, work and stay.