

A12 Suffolk - Wider economic benefits assessment

December 2014

Suffolk Coastal & Waveney District Councils

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Contents

Chapter	Title	Page
	Executive Summary	i
1	Introduction	1
2	Policy context and growth agenda	4
2.1	Introduction	4
2.2	East Suffolk Growth Plan	4
2.2.1	Infrastructure investment to unlock growth	5
2.2.2	Growth sectors	7
2.2.3	Market towns	8
2.3	Local planning policy and strategy	8
2.3.1	Suffolk Coastal	8
2.3.2	Waveney	14
2.4	Local economic development policy and strategy	17
2.4.1	New Anglia Local Enterprise Partnership	17
2.4.2	New Anglia LEP Strategic Economic Plan	18
2.5	East Suffolk growth trajectory	22
2.6	Summary	25
3	Stakeholder engagement – qualitative findings	26
3.1	Background and context	26
3.2	Findings	26
3.2.1	Current view of the A12	26
3.2.2	Impact of improvements on specific sectors	27
3.2.3	Impact of improvements for Suffolk	29
3.2.4	Local labour market	29
3.2.5	Growth aspirations	30
3.2.6	Unlocking housing sites	31
3.2.7	Unlocking employment sites	32
3.3	Summary	32
4	Assessment of economic benefits	34
4.1	Introduction	34
4.2	A12 potential transport schemes	34
4.3	Assessing economic impact	35
4.3.1	Employment benefits	36
4.3.2	Housing benefits	42
4.3.3	Temporary construction benefits (road improvements)	44
4.4	Summary	44
	Appendices	46

Appendix A. Yoxford settlement profile	47
Appendix B. Framlingham settlement profile	52
Appendix C. Saxmundham settlement profile	57
Appendix D. Leiston settlement profile	62
Appendix E. Wickham Market settlement profile	68
Appendix F. Woodbridge settlement profile	73
Appendix G. Martlesham settlement profile	78
Appendix H. Consultee list	83

Executive Summary

Introduction

The de-trunked section of the A12 from Ipswich to Lowestoft is an important north-south artery through Suffolk providing access and connectivity between the three largest settlements of Lowestoft, Felixstowe and Ipswich. It also has a number of market towns and key & local service centres along the route. This is particularly so in Suffolk Coastal district, with these centres destined to be a focus for growth in the future. In this document we estimate economic impacts likely to occur with an improved A12 using techniques that link infrastructure investments to local jobs and Gross Value Added (GVA or local productivity).

While there is a widely accepted belief that the A12 is generally unsuitable for modern day traffic movements and flows, there has been less focus on developing individual schemes and proposals to improve it and support growth in the future. We understand that this is now beginning to change and that this report is part of the process of considering what may be needed and where along the A12 to support growth in future. Improvements to the A12 at Martlesham to support growth and the four villages by-pass (4VBP) proposal are schemes that are likely to gain some traction and support locally as they have been discussed in the public domain, but there are likely to be other schemes that will come forward in the future that will also warrant serious consideration. The analysis presented in this document has been provided at a high level and focuses on the A12 Corridor generally but is, at this juncture, unable to focus on specific schemes and interventions.

Policy context

The overarching policy and strategy context for Suffolk Coastal and Waveney is one of growth within environmental limits. Targets for growth are set out in the respective Core Strategies of each district, but the policy framework to manage the spatial distribution of growth is still being prepared. In Suffolk Coastal, there are no current housing land allocations apart from a site at Rendlesham, although work on the 'Site Allocations and Area Specific Policies and the Felixstowe Peninsula AAP' is now underway and will serve to direct growth in future. A similar position is evident for employment land and an early review of the adopted Core Strategy is to begin in 2015 in recognition of the higher rates of population, household and employment growth that have been projected beyond what is set out in the Core Strategy.

In Waveney a slightly different position emerges. Based on analysis of the East of England Forecasting Model (EEFM) projections it appears that the land currently allocated for housing and employment is sufficient to deliver the growth set out in the Core Strategy. However, for the future growth beyond the Core Strategy period it is not yet clear what the quantum or location of growth will be and ongoing 'Employment Land Needs Assessment' and the 'Objectively Assessed Housing Needs' work will assist in understanding the scale and location of growth in future.

At the present time and in relation to the above points, our conclusion from the review undertaken here is that there is underlying and unmet demand for growth in the area which the A12 improvements would support if sufficient and suitable land was available. Improvements to the A12 would also benefit the Ipswich Policy Area² and its growth aspirations.

² Suffolk Coastal District Council shares an administrative boundary with Ipswich Borough Council, along with Babergh and Mid

Wider economic benefits

On the basis of the high level assessment undertaken here, we believe improvements to the A12 between Ipswich and Lowestoft would support and accommodate growth in the main settlements along its route. There is also, of course, the possibility that additional sites would come forward in future which we have not been able to consider in this assessment as they are not yet known.

On the basis of the analysis completed here, we believe improvements along the A12 corridor could support the delivery of approximately **2,354 jobs** (including indirect supply chain and induced consumption effects) and **£132.9m GVA per annum**. These figures include direct, indirect (supply chain) and induced (consumption) effects and are based on the gross capacity for individual sites and assumptions over the proportion of growth at each site that could be constrained by insufficient highway infrastructure in future. We assume that the growth is to come forward from 2020 and could take 10-15 years to be realised.

Around **2,088 dwelling units** could also be brought forward with improvements to the road. Should improvements not be made to the road then there is a possibility that this development would be crowded out due to the length of journey times, congestion and highway reliability.

It should be noted that the assessment is high level and has been undertaken without detailed information about individual road upgrade schemes that may come forward to improve the A12. Consequently, the results from our analysis could increase or decrease depending on the detail of individual schemes and the relationship they may have with development sites in the future. The analysis also assumes that development would be influenced in the period starting from 2020 and only includes land allocated for development in the current local planning frameworks and considered developable in the SHLAA. The picture that emerges in future may be of more substantive growth as planners and decision makers identify additional sites and locations for growth that have not been included here. It is therefore advisable that further analysis is undertaken as detail (type of improvement, location, delivery timeframe and cost) on the potential highway improvements becomes clear so that the analysis can be refined and used to inform business case and project development work.

Suffolk District Councils. Ipswich has relatively tight administrative boundaries and there are cross boundary strategic issues that are relevant to the development and future of the urban area of Ipswich and surrounding areas. This has long been recognised with the identification of the 'Ipswich Policy Area' (IPA).

1 Introduction

1.1 Appointment and study purpose

Mott MacDonald was appointed in September 2014 to undertake a high level review of the wider economic benefits that could arise from improvements to the A12 between Lowestoft and Ipswich. We were specifically asked to assess the impact the improvements could have on employment and housing land along the A12 corridor in Suffolk. The primary focus is on settlements in Suffolk Coastal District and the improvements are considered at the general level as no business case and project development work has been undertaken on them to date.

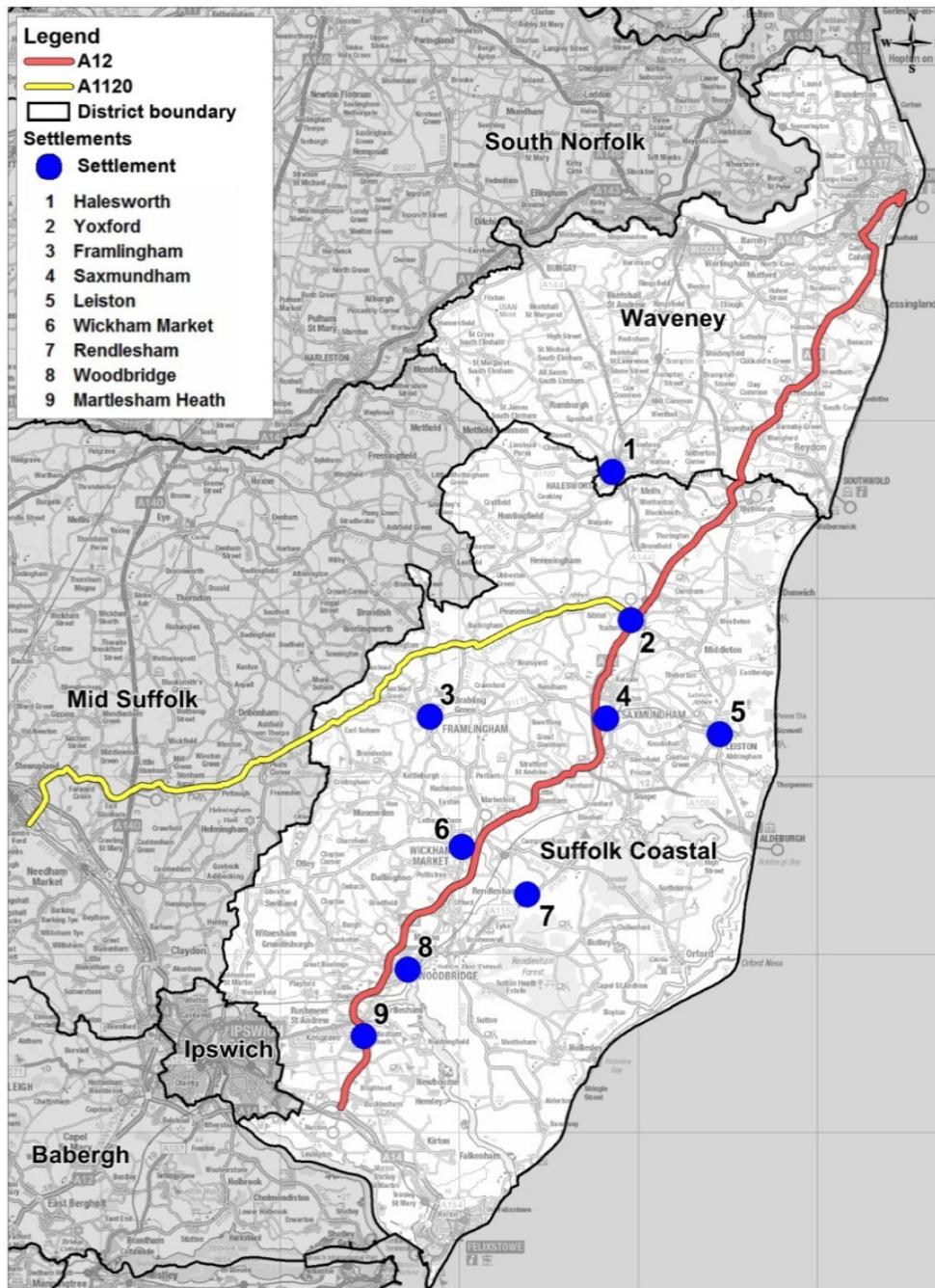
1.2 Method and approach

In 2012 Mott MacDonald completed a study³ looking at the A47 from Peterborough to Great Yarmouth focused on how dualling and junction improvements could lead to employment and housing development. We followed this with a study in March 2014 on the A12 between Great Yarmouth and Lowestoft and the potential for renaming it as A47 (from A12). The rationale for undertaking this current piece of work on the A12 between Lowestoft and Ipswich is to continue the same frame of analysis and understand the wider economic benefits that may arise following improvements to the highway infrastructure. Whilst it is generally acknowledged that investment in highways infrastructure (new and improved) has a link to better economic performance for local areas it is clear that economic, social, environmental and policy circumstances have a role to play in shaping the scale and pace of such change. It is this scale and pace of change that our approach seeks to capture and quantify against reasonable assumptions and local circumstances. The study area is shown in Figure 1.1 below. The approach undertaken is as follows:

- Workshop-style discussion with local authority officers on the study context, the area's growth potential and land-use/sites for consideration.
- Site visit along the A12 and to settlements.
- Review of the policy context and socio-economic conditions in the districts and settlements on the A12 Corridor.
- Review of land-use and site information contained within the local authorities' planning documents on employment and housing land supply to generate inputs for Mott MacDonald's Transparent Economic Assessment Model (TEAM) which is used to assess the economic benefits that may arise if improvements to the highway infrastructure are made. Figure 1.2 illustrates how TEAM works to assess local economic benefits linked to land-use change as a result of infrastructure improvements.
- Where benefits cannot be easily quantified we have produced a narrative discussion of qualitative benefits informed by discussion with key stakeholders.
- A validation session was held in Suffolk to discuss the findings from TEAM and the assumptions used in the assessment.

³ Mott MacDonald (2012) A47 Wider Economic Benefits, <http://www.persona.uk.com/A47postwick/deposit-docs/DD-368.pdf>

Figure 1.1: A12 Suffolk, study area



Contains Ordnance Survey data
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Source: Mott MacDonald

Figure 1.2: TEAM's approach to assessing economic benefit



Source: Mott MacDonald

1.3 Document structure

The remainder of this document is structured as follows:

- Section 2 – policy context and growth agenda.
- Section 3 – stakeholder engagement and qualitative findings.
- Section 4 – our assessment of wider economic benefits.
- Appendices – settlement profile for A12 Corridor in Suffolk and a list of consultees spoken to as part of this study.

2 Policy context and growth agenda

2.1 Introduction

This section provides a summary overview of the policy framework for Waveney and Suffolk Coastal districts. It focuses on the local level and sets out the context for growth in the area.

2.2 East Suffolk Growth Plan

The East Suffolk Growth Group (ESGG) was established in 2013 to provide direction to the task of growing the East Suffolk economy in response to the local and countywide aspiration to achieve economic growth. The Group comprises members and officers of both Suffolk Coastal District Council (SCDC) and Waveney District Council (WDC). Its aspiration is to develop a plan for sustainable economic and housing growth whilst maintaining and enhancing the high quality built and natural environment. The East Suffolk Growth Plan (ESGP) was published in August 2014.

The ESGP sets out its growth ambitions through the development and enhancement of key sectors and strategic growth locations. These factors are supported by cross-cutting elements such as housing, skills, inward investment, infrastructure investment and the low carbon economy which will facilitate economic expansion across the East Suffolk economy and principally in the key sectors and growth locations. The current Local Plans for both districts provide the context, in terms of the scale and distribution of employment and housing growth, for the identified growth locations.

The vision set out in the ESGP is that by 2025 East Suffolk will be more prosperous; with more businesses, stronger businesses and more jobs. ESGG will achieve this vision by:

- Protecting and enhancing natural coastal assets.
- Strengthening world-leading businesses and key sectors.
- Making the most of East Suffolk's unique location.

ESGP's goals are challenging but ESGG will work with county, regional and national partners to achieve the following:

- Create the right conditions to increase the number of jobs in East Suffolk by 10,000: from 104,000 in 2012 to 114,000 in 2025.
- Create the right conditions to increase the Gross Value Added (GVA) per person in East Suffolk so that by 2025 the GVA per person is in line with the New Anglia Local Enterprise Partnership (NALEP) average of £21,500 and in excess of the national average of £20,000 per person⁴.
- Facilitate the creation of at least 900 new enterprises by 2025, so that the area outperforms the national average of 36 enterprises per 1,000 people. (In 2012 there were 8,685 active enterprises in East Suffolk, in line with the national average of 36 per 1,000 people).

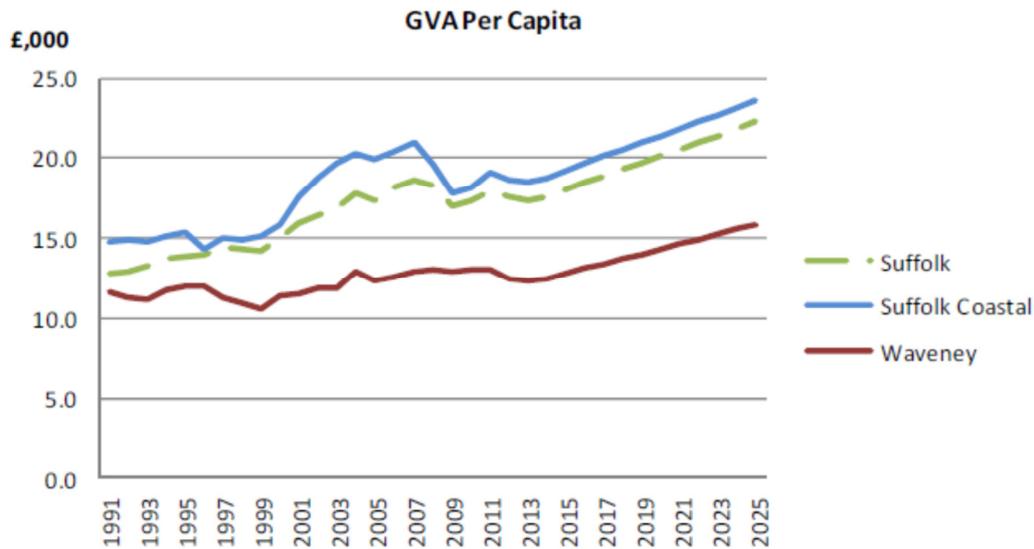
Local conditions both during the recession and in the recovery phase have been better than the national average. The 'benchmark' indicators of unemployment rates and GVA show that the East Suffolk economy

⁴ The figures quoted here are per person residing in the area. In the analysis later in this report we use different figures for GVA as we focus on the GVA per worker as the focus is on people working in the area and not residing in the area. The ESGP does not state what current level of GVA the NALEP area is currently at.

has outperformed the national economy by a significant margin and the regional economy by a smaller margin, over this period.

Historically GVA per capita has been significantly greater in Suffolk Coastal than Waveney. As Figure 2.1 shows, forecast economic growth rates suggest that between 2014 and 2025 the difference in economic performance between Suffolk Coastal and Waveney will increase. Suffolk Coastal will continue to outperform the Suffolk wide-economy and Waveney will continue to underperform by comparison to the rest of Suffolk.

Figure 2.1: GVA per capita, 1991-2025



Source: East Suffolk Growth Plan

2.2.1 Infrastructure investment to unlock growth

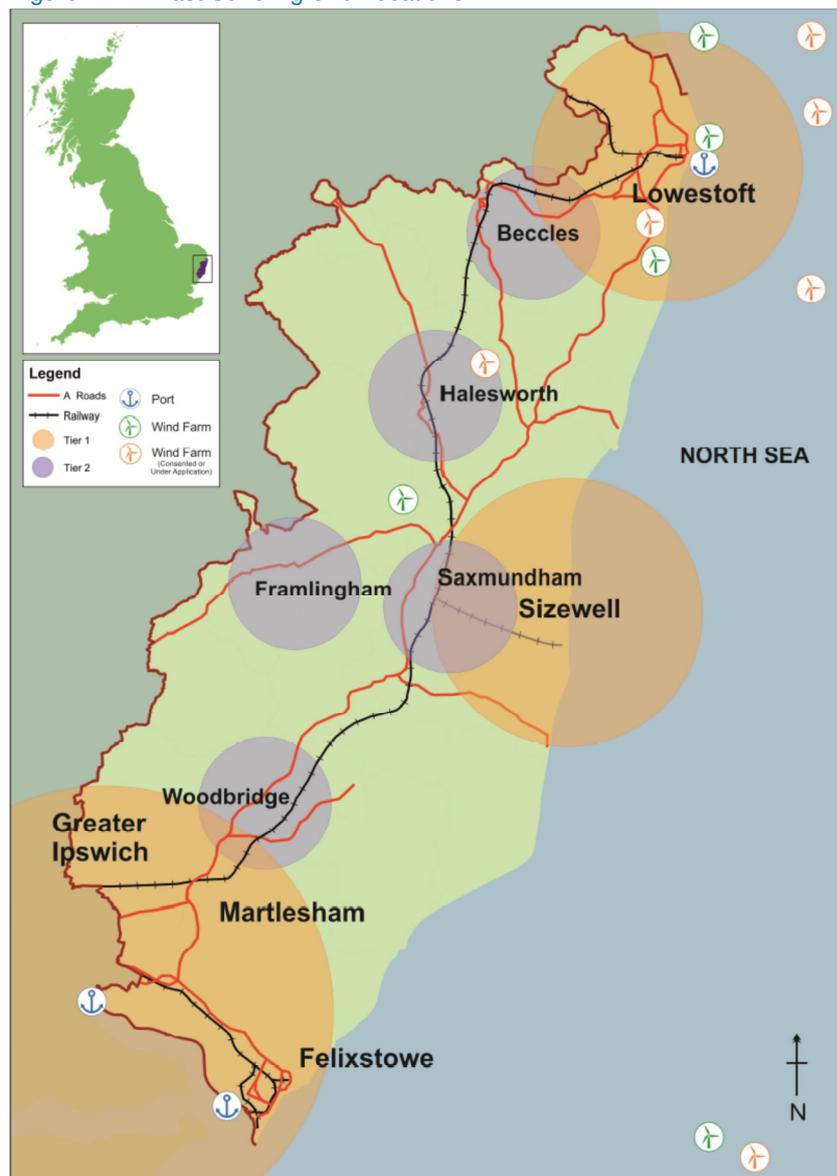
Lack of investment in transport and communications infrastructure has been consistently acknowledged, according to the ESGP, as a barrier to growth in the county and particularly in East Suffolk. A number of initiatives are planned and currently progressing in relation to main transport arteries and broadband/mobile communications. There has been a nationally-recognised need to upgrade the A14 near Cambridge for many years and works are planned to start in 2016.

In the 1990s the idea of an Ipswich northern bypass was proposed. This route would remove traffic from the A14, improve movement in and around the north of Ipswich and provide an alternative route when issues arise on the Orwell Bridge. Although the proposal has not been developed, and is not therefore likely to be built in the short or medium term, the route remains an aspiration for the ESGG.

The A12 between Ipswich and Lowestoft was ‘de-trunked’ in 2001 and has subsequently suffered from extreme under investment. The Local Transport Body (LTB) ‘long list’ included multiple A12 projects such

as the 4 villages bypass, various junction improvements and a Third River Crossing at Lowestoft. It is the main route into Suffolk from the south but includes sections that are narrow single-carriageway with 30mph speed restrictions. The 4 villages bypass would deliver improvements but is not the only restricted section. Figure 2.2 shows the importance of the A12 to the area's growth plans as it provides the only north-south road link through the area.

Figure 2.2: East Suffolk growth locations



Source: East Suffolk Growth Plan

2.2.2 Growth sectors

East Suffolk has a number of sectors that are of significance to the area's economy. In terms of wealth creation, employment and growth potential the following sectors have been identified in the ESGP as critical to future economic growth:

- Ports and logistics
 - Recent and planned expansion of the Port of Felixstowe will result in capacity growth of 50% and predicted employment growth of 5% - 1,400 new direct and indirect jobs - by the end of the decade.
 - The opportunities for the Port of Lowestoft relate mainly to the renewable energy industry; 13,000 jobs are anticipated onshore in the Enterprise Zone (EZ) and many more in offshore activities.

- Energy
 - The nuclear industry is set to expand and Sizewell is one of eight proposed new nuclear sites in England and Wales. The proposed 3.2GW Sizewell C new nuclear power station would create 20,000+ construction jobs during the 9-year build programme with up to 5,600 people being employed at peak construction and a further 900 permanent jobs for at least 60 years. There are opportunities to develop associated research and development activities related to the nuclear energy.
 - By 2025 it is estimated that the EZ will have generated 13,500 jobs, 200 firms and 540,000 m² of commercial floor space across Suffolk and Norfolk.

- ICT
 - Proposals by BT to develop Adastral Park could see the refurbishment of 2,357 m² of existing employment space, and the development of 2,000 new homes, an additional 60,000 m² of employment space and the potential for 2,000 new jobs. This has the potential to support the continued growth of this world class ICT cluster which will contribute to the employment base of East Suffolk and beyond.
 - The number of ICT businesses at Innovation Martlesham is set to double over the next three years and the cluster is forecast to support 2,000 jobs in the longer term.

- Tourism
 - The ability of the tourism sector to grow and develop depends to a great extent on the safeguarding of the area's tourism assets and on the ease of access to the area. The growing population in the Greater London area and Suffolk's expanding population present an increasing market for East Suffolk's attractions.
 - The tourism sector has not only grown consistently in East Suffolk for the past twenty years but has outstripped the rate of tourism growth at the national level. There is no reason to expect that this trend will be reversed in future.

These sectors have also been defined as key sectors by the Local Enterprise Partnership (LEP) and by the Suffolk Growth Group because they meet four different important criteria:

- High GVA per head per annum (as predicted by the East of England Forecasting Model, November 2013).

- Local assets/infrastructure which deliver a significant competitive advantage as determined by ESGG's smart specialisation approach.
- Potential interventions have been clearly defined (as part of a SWOT analysis) and are likely to demonstrate high additionality (i.e.) growth would not occur "naturally".
- Fit with the government's national industrial strategy.

2.2.3 Market towns

East Suffolk also has a number of market towns which are recognised as important centres of commerce, culture, tourism and recreation. Each is unique and has the opportunity to be an engine for economic growth in its locality. The market towns are important in that whilst the key employment sectors are largely based in East Suffolk's Tier 1 growth locations (Ipswich, Felixstowe, Lowestoft), the market towns tend to support the smaller employment sectors such as food production, retail and financial services.

The market towns with potential for growth in population and employment include Beccles & Worlingham, Halesworth, Framlingham, Saxmundham and Woodbridge & Melton. The A12 is a key transport artery for several of these market towns. Rendlesham is also included in the analysis as there are potential development sites to accommodate growth in and close to the settlement, including the former RAF Bentwaters site..

2.3 Local planning policy and strategy

2.3.1 Suffolk Coastal

2.3.1.1 Local Plan

The Suffolk Coastal District Local Plan, published in July 2013, sets out the Council's long term vision for growth, which is that by 2027:

"Having built on the best of the past, Suffolk Coastal will be a District where people can and want to live and to invest, as well as to care for others and the environment."

Suffolk Coastal Local Plan, 2013

The District's ambition for growth includes a focus on a range of key areas including:

- Sustainability.
- Housing growth.
- Employment and Local Economy.
- Transport and Road Network.

Sustainability

The District's core objective in relation to sustainability is:

'To deliver sustainable communities through better integrated and sustainable patterns of land use, movement, activity and development.'

Suffolk Coastal Local Plan, 2013

The interconnectivity of elements such as housing, employment and transport, and the need for balance across each of these areas is central to this concept of sustainability within the Local Plan. This is demonstrated by objectives such as ensuring that new housing developments are directly related to employment, transport and infrastructure.

Housing Growth

Related to the District's ambition for growth is the recognition that an increase in housing stock will play a key role in supporting this; allowing more people to live and work in the Suffolk Coastal area, and therefore contribute to the local economy. Consequently, the Core Strategy will make provision for at least 7,900 new homes across the district in the period 2010 to 2027.

The Local Plan recognises that the focus for growth will be the major centres – notably the more urbanised area east of Ipswich and to a lesser extent the Felixstowe peninsula, both of which contain strategic employment sites of regional and national significance. Elsewhere new homes will be dispersed across the other market towns and smaller sustainable communities. New growth will be at levels appropriate to the size of the town or village, taking account of its function, character and environmental capacity.

Key considerations in terms of the location of new housing developments, in line with national policies providing guidance on sustainable development, include:

- car dependency should be reduced by locating housing closer to employment, education, health facilities, shops, leisure and local facilities;
- the majority of new developments should be located in and adjacent to the main urban areas;
- the role of market towns and large villages in providing employment and services to a rural hinterland should be sustained;
- careful examination of how a community or group of communities function is required; and
- the quality and character of the rural areas should be protected.

Employment and Local Economy

The East of England is recognised as one of the fastest growing regional economies in the UK. In order to sustain this growth in the district, the Local Plan recognises the importance of both the creation of new jobs and also ensuring that the existing employment base is secured and supported.

The provision of new jobs is expected to occur over a wide variety of economic sectors including health, retail and tourism. To support the creation of new jobs in these and other areas, the Local Plan outlines aims to deliver a network of employment sites of a size, quality and in locations that:

- accord with the Settlement Hierarchy;
- best meet the needs of existing businesses;

- are able to support the growing sectors of the local economy; and
- where appropriate, contribute to regeneration.

Key economic drivers in the region, identified in Oxford Economics' Suffolk Coastal Profile and Outline (2010) and cited within the Local Plan include:

- The Port of Felixstowe is the biggest container port in the country and is planned to grow substantially over the plan period, requiring good rail and road links. A 2008 Felixstowe Port Logistics Study identified a need for additional land to support other port-related uses. A 2010 Economic Assessment of the port and its associated businesses confirms the significance of this sector to the local and wider economy, although the rate of expansion of traffic is likely to be somewhat lower than expected prior to the recession.
- Sizewell has been identified by government as one of the potential sites to accommodate additional new nuclear provision. It has a role to play within the larger Low Carbon Energy Corridor stretching north from Sizewell to Lowestoft.
- The licensing of the East Anglian Array Offshore wind project creates a range of possibilities for energy development in conjunction with the potential nuclear regime; not least in the learning and skills provision and in the local engineering and ports sectors.
- BT's Research and Development headquarters at Martlesham Heath forms a key part of the information, communication and technology (ICT) cluster for the East of England including Innovation Martlesham, a research and development function considered to be of importance nationally.

Although the economy of the area is generally sound and social deprivation not prominent, there are areas where the Council considers regeneration to be a priority. These occur primarily as a result of external influences such as changes in the way the public spends its holidays or spends its money, and the closure or decline of large employers.

Transport and Road Network

The interconnectivity of transport with economic growth and prosperity is emphasised throughout the Local Plan, recognising the need for significant investment and improvements to transport infrastructure in order to unlock and support economic growth.

Key areas for improvements in relation to this include:

- The development of the rail network, particularly the freight connection from Felixstowe to Nuneaton, is important for, and a requirement of, the development of the Port (Felixstowe South Regeneration (FSR)), so as to limit road usage. Greater use and improvement of the two passenger rail lines within the district will help in terms of maximising the efficiency of the transport network.
- Managing traffic on the A14 to ensure that it can continue to operate effectively as a major freight route and upgrading the A12.
- Improved transport links between the rural communities to provide better access to training and educational facilities and to employment opportunities is a key part of the overall strategy.

The Local Plan recognises the need to work with partners and developers in order to achieve this and to provide an integrated and well managed transport system (both within and beyond the district boundaries),

that meets the needs of residents and businesses. This includes minimising the need for people to travel by private car, making the most of opportunities for freight to be moved by means other than road and ensuring that improvements are made to public transport and to the local foot and cycle networks particularly where they provide access to local facilities.

The A12

At the national, regional and sub-regional level, the A14 and A12 are important transport arteries which serve the dual purpose of providing strategic links to the wider road network and employment centres as well as providing local access. It is essential if growth plans for East Anglia are to be successful, that these routes function efficiently.

The A12 is recognised as a key route running north-south through the district, connecting the rural areas with the primary road network and the rest of the country. It is essential to the local economy within and beyond Suffolk Coastal District, linked to opportunities associated with the energy industry and the Low Carbon Energy Corridor which is developing between Sizewell and Lowestoft; and as a tourist route. However, journey times are hampered by stretches of single carriageway and reduced speed limits north of Woodbridge. In order to maintain quality of life for those residents living alongside the route however, reduced speed limits are necessary. The Council recognises community aspirations for a 4VBP or other solution for the villages of Farnham, Little Glemham, Marlesford and Stratford St Andrew to improve a stretch of the A12 which is particularly narrow and twisting with buildings very close to the road.

The Council's preferred approach to this northern section of the route is to support in general its upgrading, given its importance to local traffic movements to much of the area, and the lack of suitable alternative routes, particularly for delivery and other heavy goods vehicles. Such support is, however, subject to consideration of other issues, not least the fact that the settlements are located within a Special Landscape Area. Any scheme to improve the road would therefore have to carefully assess and balance the environmental impacts.

The A12 south of Woodbridge is a dual carriageway but is subject to separate pressure as a result of the strategic levels of proposed housing and employment growth east of the A12 at Martlesham. A transport assessment has been undertaken to identify the impact of this development on the strategic and local road network and forms part of the evidence base supporting the Suffolk Coastal Core Strategy. In relation to the A12 it identifies the need for improvements to each of the main roundabouts between A1214 and Seven Hills Interchange as a consequence of this scale of development. The timely provision of these improvements will be a requirement of these developments and will be expected to be provided by means of developer contributions.

To help achieve the Council's vision, and to ensure the area can continue to meet wider regional objectives, there is commitment that the continual enhancement of all routes will be sought and supported, especially where these are required as part of the infrastructure for new developments. A combined approach working particularly closely or in partnership with other neighbouring authorities; regional bodies, the relevant highway authorities and public transport providers is also acknowledged as necessary if this is to be achieved.

Sizewell

The Core Strategy includes coverage of nuclear power at Sizewell in paragraphs 3.130 to 3.133. It notes that the Government has decided that new nuclear power stations are needed but that the locations of any new power stations are not yet decided on. These decisions will be taken at a national level and the role of the planning process will be to consider the suitability of any specific proposal and the mitigation of local impacts.

Sizewell is one of the locations formally identified as a potential site for new nuclear provision and will be considered as part of the national strategic assessment. Any application for an additional nuclear station will be submitted to the Planning Inspectorate under the Planning Act 2008 and any subsequent decision made by the Secretary of State. The timeframe for construction of any new nuclear power station would be within the timeframe of the Core Strategy.

As noted earlier, Sizewell is one of eight proposed new nuclear sites in England and Wales. The proposed 3.2GW Sizewell C new nuclear power station would create 20,000+ construction jobs during the 9-year build programme with up to 5,600 people being employed at peak construction and a further 900 permanent jobs for at least 60 years. There are opportunities to develop associated research and development activities related to nuclear energy.

2.3.1.2 Employment land supply – Suffolk Coastal Employment Land Assessment (April 2013)

According to Suffolk Coastal District Council, the total employment land availability as of April 2013 is 82.88 hectares (ha). A breakdown of the broad location of this land is included Table 2.1 below:

Table 2.1: Breakdown of Employment Land Availability by Local Area

Location classification	Area	Employment land (ha)
Urban	Felixstowe	29.80
	Ipswich Eastern Fringe	19.05
Rural	Framlingham	6.07
	Leiston	4.75
	Saxmundham with Kelsale	8.38
	Woodbridge with Melton	6.96
	Rural Areas (Unspecified)	2.65
Not Classified	Miscellaneous	5.22
<i>Total Urban</i>		<i>48.85</i>
<i>Total Rural</i>		<i>28.81</i>
<i>Total (including miscellaneous)</i>		<i>82.88</i>

Source: Suffolk Coastal District Council – Suffolk Council District Employment Land Assessment, 2013

Within the Local Plan, Suffolk District Council outlines its intention to make allocations for at least 8.5 hectares of new employment land within the district in support of business and to help facilitate the

provision of new jobs. This represents its contribution towards the creation of in the region of 30,000 new jobs identified previously in the former Regional Spatial Strategy – East of England Plan within the Suffolk part of the Haven Gateway.

2.3.1.3 Housing land supply – Suffolk Coastal Housing Land Supply Assessment (April 2014)

Table 2.2 below presents a review undertaken by Suffolk Coastal District Council in terms of the area's housing requirements up to 2028, which indicates that based upon current projections the Council expects to exceed its housing requirements by 110 dwellings during this period:

Table 2.2: Suffolk Coastal District Council – Progress in Meeting Overall Housing Requirements

2010-2028		Number of dwellings
i)	Total Dwellings Built (2010 – 2013)	810
ii)	Total committed supply from 2013 up to 2028 (extant planning permissions [1,530] + outstanding old allocations [80] with a 10% discount for sites which may not deliver)	1,450
iii)	Residual future supply from Core Strategy new allocations [2,740] + residual windfall [750] + sites principal of development agreed [2,730] (2013/14 – 2027/28)	6,220
iv)	Total built and committed in LDF up to 2027/28 [i) + ii) + iii)]	8,480
v)	District Housing requirement (2010 – 2028)	8,370
vi)	Estimated Plan period surplus / shortfall up to 2027/28 [iv) - v)]	+110

Source: Suffolk Coastal District Council Housing Land Supply Assessment, April 2014

This demonstrates the Council's ambition for housing growth across the district. Table 2.3, below, presents a breakdown of the proposed increase of existing housing stock, according to Suffolk Coastal District Council's Core Strategy. Interestingly, the market towns and key/local service centres accommodate just less than half the district's housing stock (49% in 2010 and 47% in 2027). This reinforces the importance of the A12 to the district.

Table 2.3: Percentage increase of existing housing stock from the Core Strategy

Area	Existing Housing Stock as of April 2010		Identified New Housing			Totals for 2027 (Existing stock plus new housing)	
	Units	%	Units	% of new housing	Per annum	Units	% of total housing stock
Eastern Ipswich Plan Area	12,185	21	2,320	29	136	14,505	22
Felixstowe, Walton and the Trimleys	13,763	24	1,760	22	104	15,523	24
Market Towns	11,789	20	1,520	19	89	13,309	20
Key and Local Service Centres	16,771	29	1,350	17	79	18,121	27

Area	Existing Housing Stock as of April 2010		Identified New Housing			Totals for 2027 (Existing stock plus new housing)	
Other Villages and Countryside	3,503	6	100	-	-	3,603	5
District Windfall	-	-	850	-	-	850	-
District Total	58,011	100	7,900	100	465	65,911	100

Source: Suffolk Coastal District Core Strategy, July 2013

2.3.2 Waveney

2.3.2.1 Core Strategy

The Waveney Core Strategy was adopted in January 2009 and forms part of the Waveney Local Development Framework. This document outlines the approach to development, planning and growth in the district up to 2021. The vision for Waveney which underpins the Core Strategy is set out in the Waveney Sustainable Communities Strategy (2007), produced by the Waveney Local Strategic Partnership:

“Prosperous, attractive and vibrant communities with good access to jobs, services and facilities and where everybody can feel safe, be healthy and happy.”

Waveney Core Strategy

Figure 2.3, below, presents Waveney District Council’s Key Diagram, providing a spatial representation of the Core Strategy in relation to development and growth across the district. In line with national strategy (Securing the Future, 2005), the Core Strategy acknowledges five key principles and four priorities in relation to sustainable development, as follows:

- **Five principles**

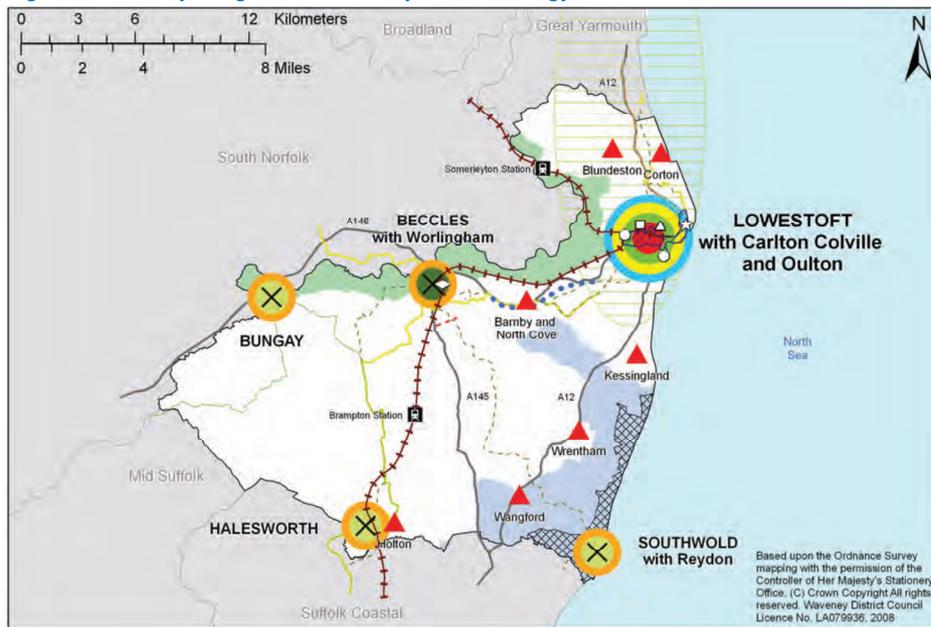
- Living within environmental limits – respecting the limits of the planet’s environment, resources and biodiversity.
- Ensuring a strong, healthy and just society – meeting the diverse needs of all people in existing and future communities, promoting personal wellbeing and creating equal opportunity for all.
- Achieving a sustainable economy – building a strong stable and sustainable economy which provides prosperity and opportunities for all, and in which environmental and social costs fall on those who impose them (polluter pays)
- Promoting good governance – actively promoting effective participative systems of governance in all levels of society
- Using sound science responsibly – ensuring policy is developed and implemented on the basis of strong scientific evidence, whilst taking into account scientific uncertainty (through the precautionary principle).

- **Four priorities**

- Sustainable production and consumption

- Climate change and energy
- Natural resource protection and environmental enhancement
- Sustainable communities

Figure 2.3: Key Diagram – Waveney Core Strategy



Spatial Strategy / Settlement Hierarchy (CS01)

- Main Town (Most growth - housing, employment and retail)
- Market Town (Modest growth - Most housing development in Beccles and Halesworth)
- Larger Village (Small scale growth - particularly for services and affordable housing)

Retail Hierarchy (CS10)

- Major Town Centre
- Large Town Centre
- Smaller Town Centre
- District Centre

Employment

- Strategic Employment Location
- Other Centre for Employment Growth (CS07)
- Lake Lothing and Outer Harbour Area (Strategic Employment Site) (CS05, CS07)
- Renewable Energy Cluster (CS08)

Transport

- Regional Transport Node
- Main Rail Corridor
- Main Road Corridor
- Rural Train Stations (Stations also in Lowestoft, Oulton Broad, Beccles and Halesworth)
- National Cycle Network Route
- Heart of Suffolk Cycle Route

Transport Provision (CS15)

- Lowestoft Access Project
- Transport Interchange
- Bamby to Carlton Colville Bypass
- Beccles Southern Relief Road
- Quality Bus Corridor
- East Suffolk Line Rail Loop (Beccles)
- Proposed National Cycle Network Route

- Heritage Coast
- Area of Outstanding Natural Beauty
- Broads Authority Area (outside the Waveney Local Development Framework area)
- Lowestoft and Great Yarmouth sub region
- Waveney District Boundary

Source: Waveney Core Strategy, 2009

Considering these principles and priorities, key points identified within the spatial planning and strategic objectives for Waveney include:

- Lowestoft is identified as a priority area for regeneration.
- Provision of at least 5,800 (290 p.a.) additional dwellings over the period 2001 to 2021.
- An expectation across the region that 35% of all housing coming forward should be affordable.
- An indicative target for net growth in jobs for the period 2001–2021 of 5,000 for Waveney District.
- 60% target for the re-use of previously developed land, applying mainly to housing and employment development but recognising sub-regional variations in achieving the target.
- The strategy for the coast is to adopt an integrated approach to the regeneration of coastal towns and communities covering economic, social and environmental issues.
- Lowestoft and Great Yarmouth are identified as Key Centres for Development and Change, where development in the Region will be concentrated. A specific policy covers both areas.
- Lowestoft and Great Yarmouth are identified as Strategic Employment Locations supporting port expansion, regeneration and economic diversification.
- The need to support a regionally significant energy cluster on the Norfolk/Suffolk coast.
- Lowestoft is identified as a Regional Transport Node as a focus for improvements to inter urban public transport.
- Recognition of the important role of market towns and larger villages in providing employment and services to their rural hinterlands.

Transport and Road Network

Policy CS15 within the Core Strategy focuses on sustainable transport and specifically the District Council's intention to work with a range of local partners to **'secure the necessary transport infrastructure and sustainable transport measures to facilitate the regeneration of Lowestoft and the market towns, support the local economy, improve access to services and facilities particularly in rural areas and minimise the impact of traffic on the environment.'**

The A12 is identified as the main link from London to Great Yarmouth, running via Lowestoft, and both this and the A146 are the principal highway network within Waveney. The Core Strategy outlines the Council's intentions to pursue measures to make local improvements on the A12 from Lowestoft to Ipswich via lobbying to assist in securing economic benefits to Waveney.

2.3.2.2 Employment land supply – Waveney Employment Land Availability Assessment (March 2013)

Waveney District Council's Employment Land Availability assessment, undertaken in March 2013, concluded that, in total, there was 97.93 hectares of land available for employment development. A broad breakdown of this by area is provided in Table 2.4 below.

Table 2.4: Breakdown of Employment Land Availability by Local Area

Area	Total (ha)
Lowestoft	45.86
Beccles	31.53
Bungay	4.88
Halesworth	13.59
Southwold	2.07
<i>Total</i>	<i>97.93</i>

Source: Waveney District Council Employment Land Availability Assessment, March 2013

If all the land available for employment is developed, this could potentially deliver 380,953m² of employment floorspace. The Lowestoft and Great Yarmouth AAPs – Employment Land Evidence Base Report (DTZ, 2009) suggests that on average 33.5m² of floorspace will accommodate one worker. Therefore, land available for employment development could potentially generate 11,371 new jobs. However, given the short-term viability challenges it is unlikely that the total amount of potential floorspace will be delivered wholly within the plan period. Sites with planning permission, serviced/partially serviced sites and available vacant land in employment areas are more likely to provide development in the short term.

2.3.2.3 Housing land supply – Waveney Statement of Five Year Housing Supply (March 2014, Draft)

The Core Strategy requires that a minimum of 6,960 new homes are to be built in Waveney between 2001 and 2025. This is an annual average rate of 290 per year. At the end of March 2014, 3,978 dwellings had been completed, with a further 137 anticipated to be delivered in the current year (2014/15). This leaves 2,845 dwellings to be delivered from April 2015 to March 2025, at an average of 285 per annum, in order to meet the Core Strategy requirement. A 5-year supply of land would therefore need to be sufficient to deliver at least 1,425 dwellings.

The National Planning Policy Framework requires an additional buffer of either 5% or 20% to ensure choice and competition. Due to the historic over delivery of new housing in Waveney the requirement is 5% equating to 71 dwellings. Therefore a total of 1,496 dwellings are required to provide a 5-year supply for the period 2015-20. Waveney Council's position as at March 2014 (draft figures) is that this can be achieved.

2.4 Local economic development policy and strategy

2.4.1 New Anglia Local Enterprise Partnership

The New Anglia Local Enterprise Partnership (LEP) was established in December 2010. A dynamic, business-led organisation with clear goals: to create jobs and remove the barriers to growth that exists in Suffolk and Norfolk – enabling the region to achieve its full potential.

New Anglia focuses on sectors, including energy and tourism, and themes which affect a wide range of businesses, now and in the future, including the development of the green economy, business support and skills development. The New Anglia LEP working in conjunction with its local partners has already established an impressive legacy including;

- Creating the Great Yarmouth and Lowestoft Enterprise Zone.
- Securing Green Pathfinder status; New Anglia is the national lead and exemplar for developing the green economy.
- Securing more than £30 million of funding to help business growth in Suffolk and Norfolk.

2.4.2 New Anglia LEP Strategic Economic Plan

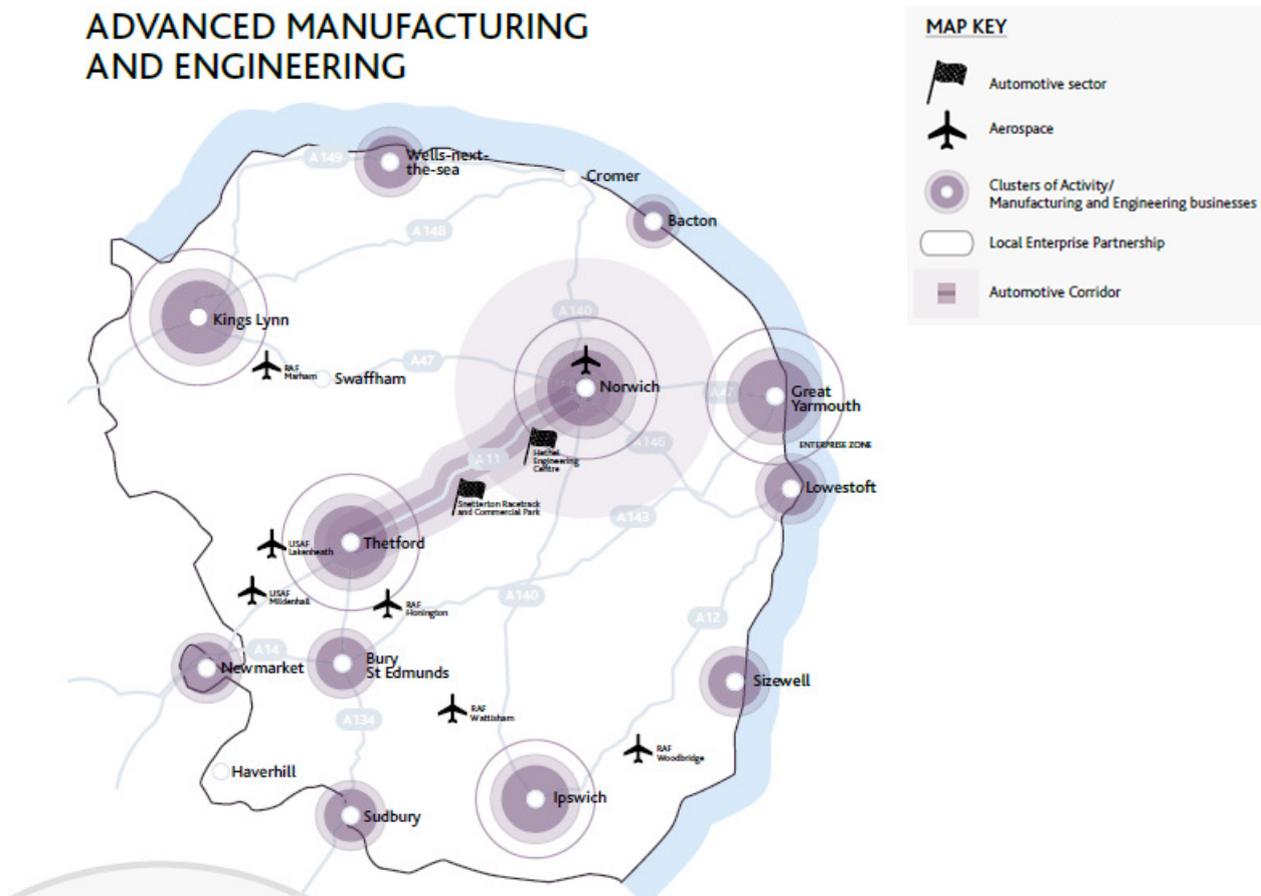
The Strategic Economic Plan, March 2014, sets out the LEP's ambition to harness the area's distinct sector strengths and natural assets to deliver more jobs, new businesses and housing. The plan commits the LEP and its partners to work with government and local partners to deliver:

- 95,000 more jobs: In 2012 there were some 760,000 jobs in the New Anglia area. The East of England Forecasting Model predicts that continuation of pre-existing investment plans will see this grow by 63,000 by 2026. The Strategic Economic Plan will significantly increase this business as usual number by 50 per cent to 95,000.
- 10,000 new businesses: Small businesses are the lifeblood of the economy – accounting for more than 95 per cent of businesses in the area. By 2026 the LEP intends to create a further 10,000 new businesses.
- Improved productivity: GVA per job in the area was £36,244, some 10% below the UK average of £40,007. The East of England Forecasting Model predicts that pre-existing investment plans will see this gap remain. The Strategic Economic Plan will assist to extinguish the gap by 2026 when GVA per job will equal the national average.
- 117,000 new houses: The local authorities have set ambitious house building targets to support economic growth. By 2026 they will have delivered at least 117,000 new houses in the New Anglia area – key local plans have the flexibility to deliver more if the demand arises. This equates to a 32 per cent increase in delivery compared with the period 2001-12

The New Anglia area has strengths in many of the sectors with the greatest potential for growth – advanced manufacturing and engineering, agri-tech, energy, ICT & digital creative, and life sciences. Key locations for the core growth industries are presented in Figures 2.4 to 2.7 below.

Figure 2.4 below presents the key locations for advanced manufacturing and engineering across New Anglia, as identified within the Strategic Economic Plan. Both Lowestoft and Ipswich are identified as key cluster areas for such businesses, as is Sizewell which is located between these two locations and just off the A12 as a key route linking the two.

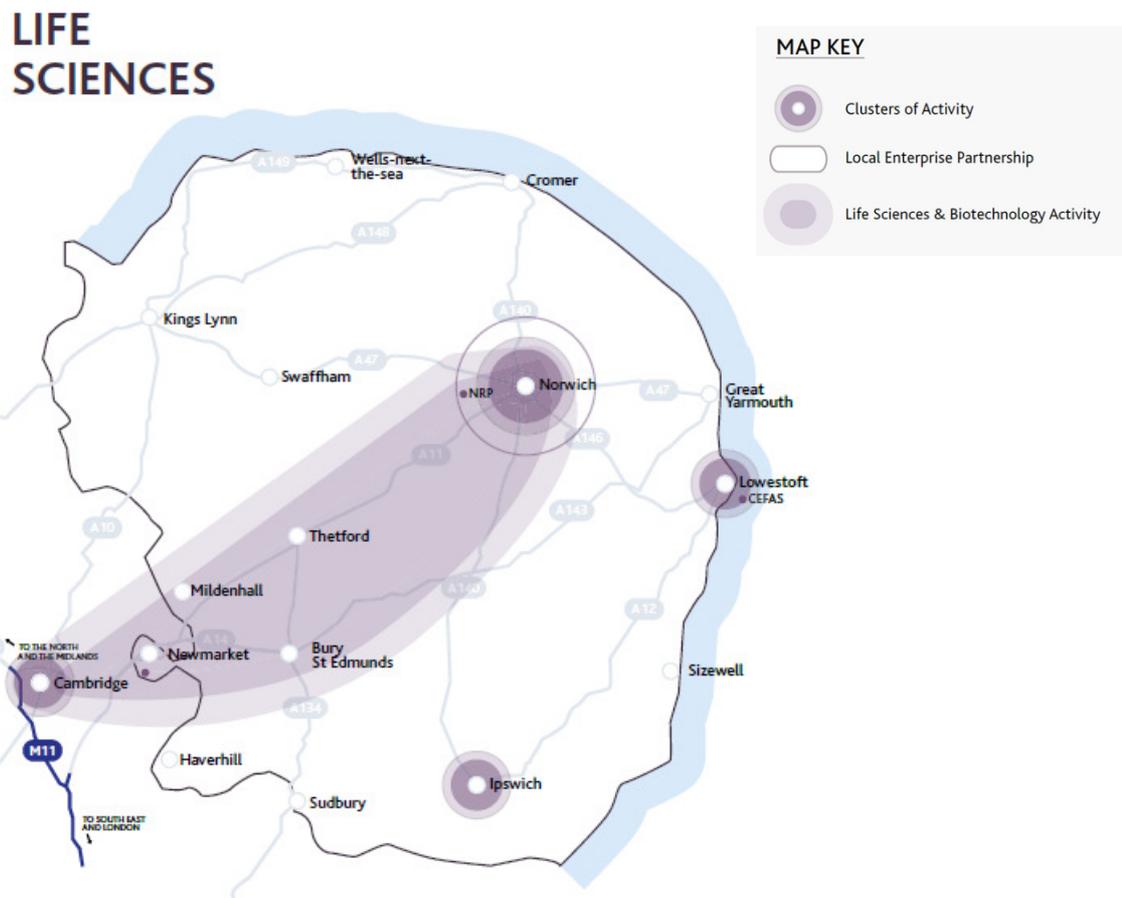
Figure 2.4: Advanced Manufacturing and Engineering Key Locations – New Anglia Strategic Economic Plan



Source: New Anglia Local Enterprise Partnership – New Anglia Strategic Economic Plan, 2014

Similarly, both towns are highlighted as key locations for the life sciences sector in Figure 2.5 below. Ensuring connectivity between these locations, and other key local sites within this sector is therefore vital to ensure continued growth.

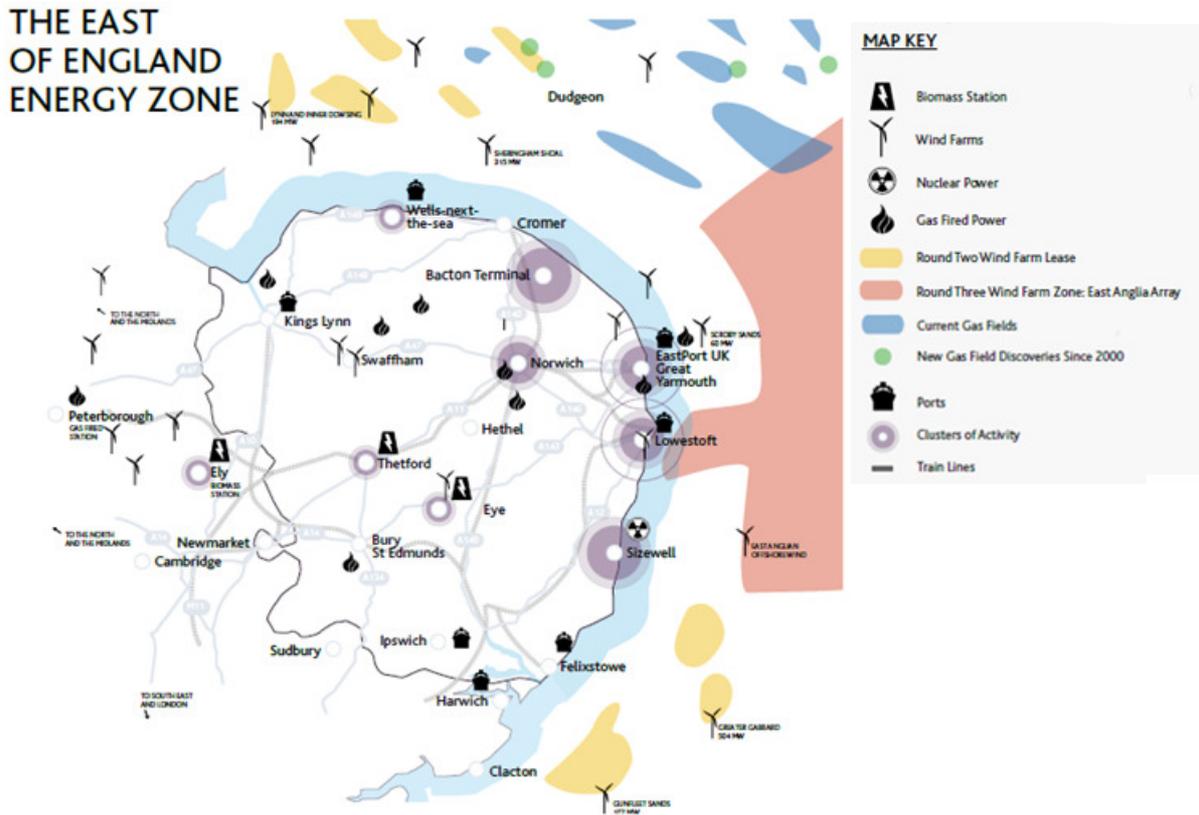
Figure 2.5: Life Science Key Locations – New Anglia Strategic Economic Plan



Source: New Anglia Local Enterprise Partnership – New Anglia Strategic Economic Plan, 2014

The energy sector is also a growing industry within the local area and one which both Sizewell and Lowestoft are identified as key clusters of activity within (see Figure 2.6 below). Additionally, the A12 is the main access route to the EZ and the energy clusters in the area from the south. Again, maintaining connectivity between these sites and other key energy locations in the local area will therefore be vital to ensure that this sector continues to grow.

Figure 2.6: Energy Sector Key Locations – New Anglia Strategic Economic Plan

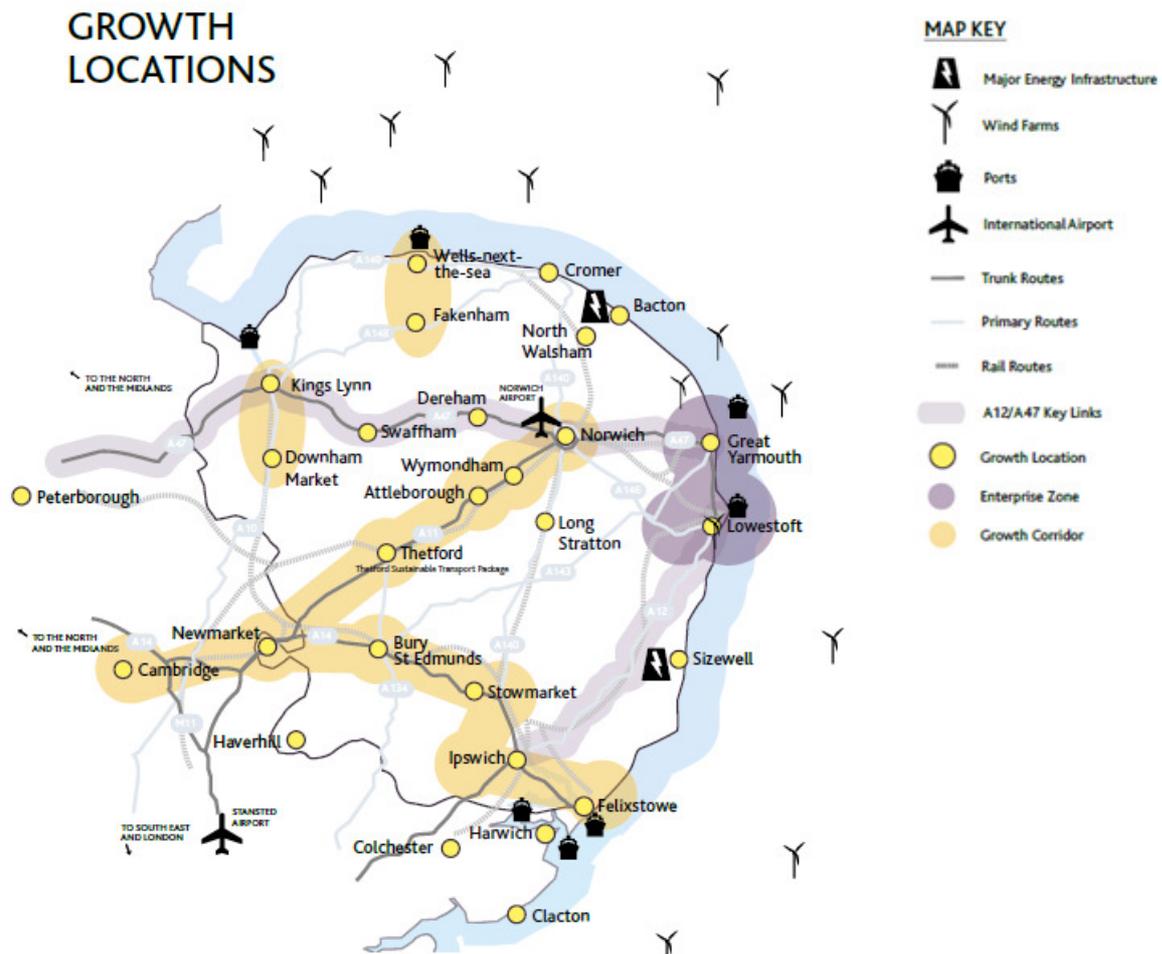


Source: New Anglia Local Enterprise Partnership – New Anglia Strategic Economic Plan, 2014

Figure 2.7 below presents the overall growth locations identified within the LEP’s Strategic Enterprise Plan. As with the specific sectors previously explored, Ipswich, Sizewell and Lowestoft are identified as growth locations in the local area, with the A12 route a clear and important road link between these locations.

Each of the above diagrams highlights that improved connectivity between key business clusters is imperative in order to ensure the continued success of key sectors and areas of growth across Suffolk – and that the A12 is one of these key links. Furthermore, to unlock the potential in the area’s key sectors and to create new jobs and businesses requires focused investment by local partners and Government to improve the area’s infrastructure, ensure businesses have a supply of skilled workers and the right support to grow.

Figure 2.7: Key Growth Locations - New Anglia Strategic Economic Plan



Source: New Anglia Local Enterprise Partnership – New Anglia Strategic Economic Plan, 2014

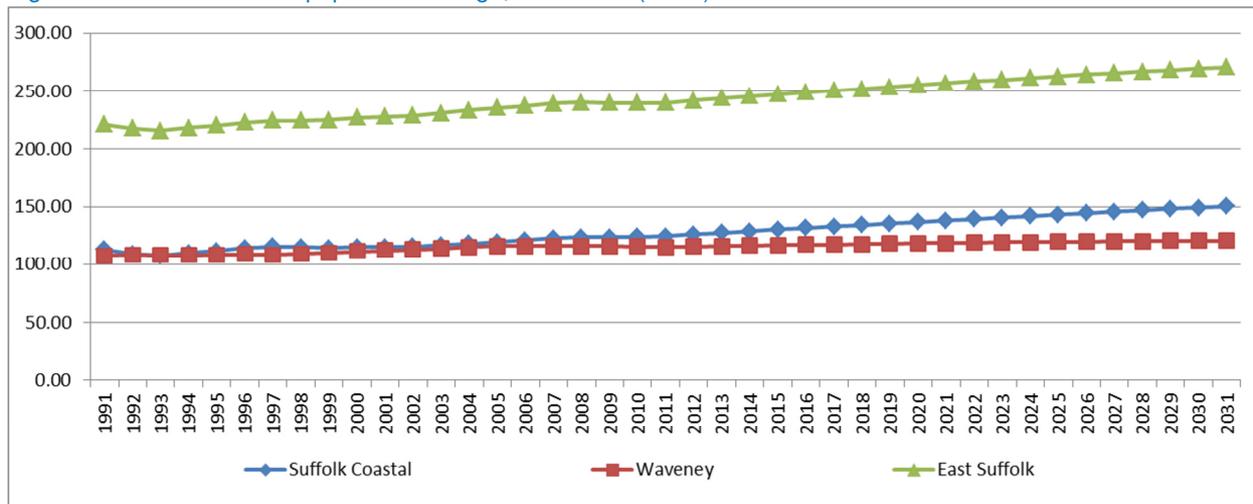
2.5 East Suffolk growth trajectory

Drawing on data provided by the East of England Forecasting Model the following charts set out how growth is expected to occur in East Suffolk and in the districts of Suffolk Coastal and Waveney. The East of England Forecasting Model (EEFM)⁵ was developed by Oxford Economics to project economic, demographic and housing trends in a consistent fashion. It covers a wide range of variables, and is designed to be flexible so that alternative scenarios can be run. The spring 2013 baseline forecasts were updated in August to include the latest dwelling stock estimates and are used in the Figures below.

⁵ <http://www.cambridgeshireinsight.org.uk/EEFM>

Total population is expected to increase by 25,500 people in East Suffolk from 2014 to 2031. This is part of a longer-term growth trend that has been underway since the early 1990s as Figure 2.8 illustrates

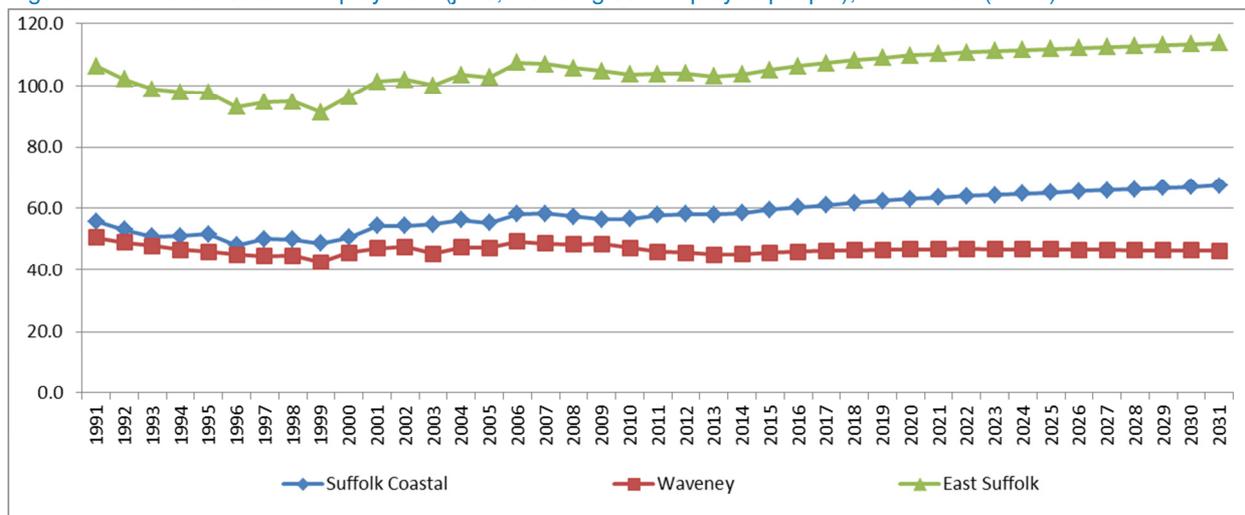
Figure 2.8: Forecast total population change, 1991/2031 ('000s)



Source: Mott MacDonald using data from EEFM [Data downloaded on 27.10.14]

In terms of total employment, Figure 2.9 illustrates how East Suffolk has experienced some growth and decline in its employment base between 1991 and 2014 with a more positive forecast in place from 2014/31. Between 2014/31 East Suffolk is expected to increase its stock of jobs by 10,000, most of this growth is anticipated to occur in Suffolk Coastal.

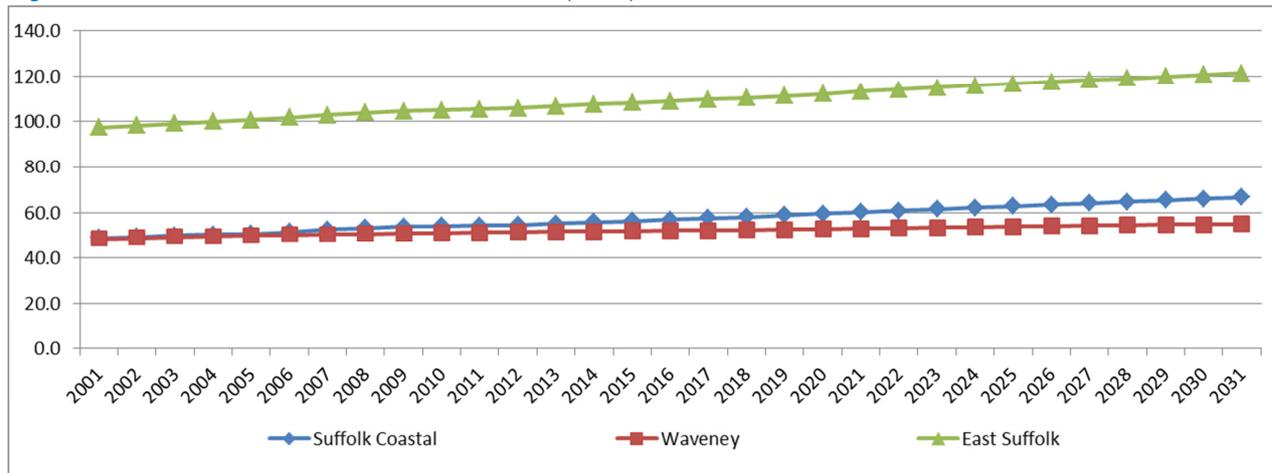
Figure 2.9: Forecast total employment (jobs, including self-employed people), 1991/2031 ('000s)



Source: Mott MacDonald using data from EEFM [Data downloaded on 27.10.14]

The number of households in the area has increased steadily since 2001 and this increase is set to continue through to 2031. From 2014 to 2031 a further 14,000 households are predicted for the area with Suffolk Coastal growing more than Waveney over that period.

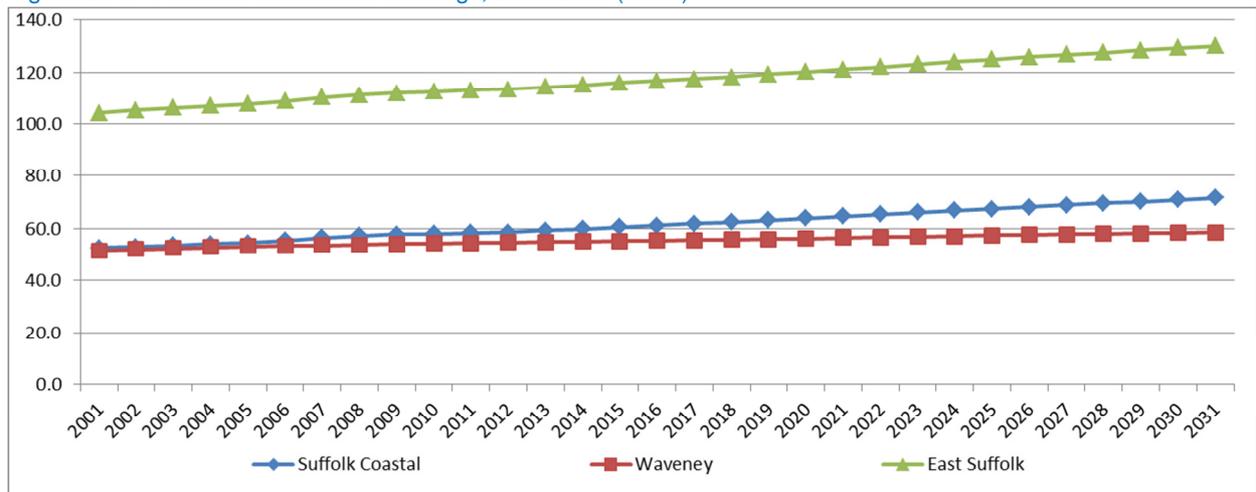
Figure 2.10: Forecast total households, 2001/2031 ('000s)



Source: Mott MacDonald using data from EEFM [Data downloaded on 27.10.14]

Demand for dwellings is expected to continue increasing as Figure 2.11 indicates. Between 2014 and 2031 demand will increase by a further 15,000.

Figure 2.11: Forecast demand for dwellings, 2001/2031 ('000s)



Source: Mott MacDonald using data from EEFM [Data downloaded on 27.10.14]

By 2031 there is expected to be demand for 130,000 dwellings in East Suffolk (Figure 2.11) and at the same time 121,600 households (Figure 2.10) – in essence, more households want to live in the area than

there are houses for them to live in. This suggests a shortfall of about 9,400 dwellings to enable households to form and reside in them as demand for dwellings outstrips supply.

2.6 Summary

A clear focus on growth is evident in terms of both policy and long term strategy for Suffolk Coastal and Waveney. Central to this is ensuring that such growth is delivered in a sustainable manner, in terms of environmental, social and economic factors, in order to secure the long term prosperity of the districts. Employment and measures to support this, such as housing and improvements to transport links, including the road network and specifically the A12, is at the heart of this growth agenda. This is evident both in terms of supporting existing employment bases, and nurturing new and emergent sectors such as ICT (e.g. BT Research and Development Headquarters and associated business clusters) and energy production (e.g. Sizewell Nuclear Energy and the renewable energy sector).

Table 2.5 below provides an overview of the housing and employment growth plans of Suffolk Coastal and Waveney District Councils. For employment growth the target is expressed differently in each Core Strategy, one is in terms of jobs and the other in terms of employment land.

Table 2.5: Summary of employment and housing growth – Suffolk Coastal and Waveney District Council Core Strategies

District and planning timeframe	Housing Growth – new housing provision	Employment Growth
Suffolk Coastal: 2010-27	7,900	8.5 ha of additional employment land
Waveney: 2001-25	6,960	5,000 additional jobs

Source: Suffolk District Council/Waveney District Council

The extent of both housing and employment growth aspirations within Suffolk Coastal and Waveney demonstrates that continued and sustained growth is high on both Councils' agendas so long as it is within environmental and sustainable limits. The identification of locations such as Ipswich Eastern Fringe and Lowestoft as key sites of employment land development, and the proximity of these locations to the A12 demonstrates the importance of improving connectivity along this route, in order to support these ambitions for growth.

The A12 is recognised as key to growth in the local area due to its status as a main transport artery, providing links across Suffolk and to significant locations such as the Port at Felixstowe and Greater London. Ensuring that the road is able to operate to maximum effect and capitalise on these links is therefore vital to ensure the sustained and sustainable growth of the area. Outside the main urban areas, the smaller settlements of market towns and villages will experience growth in the future as articulated in the local plans and the A12 is therefore central to the overall growth and development of the area. A failure to plan for growth and provide adequate highway infrastructure could hold back development and lead to demand for housing and employment development going unmet in future years.

3 Stakeholder engagement – qualitative findings

3.1 Background and context

In order to gain further insight into key issues relating to the potential economic benefits of improvements to the A12, telephone interviews were undertaken with a number of stakeholders whose contact details had been provided to us by officers in the two local authorities. Stakeholder contact details were used to issue invitations to participate – both via email and telephone (where relevant contact details were available).

During October 2014, seven telephone interviews were completed and three email responses received; a full list of those who were consulted is provided in Appendix H. Feedback received from these stakeholders is presented anonymously herein, with no comments attributable to specific individuals.

Key questions asked within this stakeholder engagement exercise include:

- Views of the A12 currently, and any need for improvement.
- The potential impact of improvements upon stakeholders' specific sectors/business areas.
- The potential impact of improvements upon Suffolk as a whole.
- The potential impact of improvements on the labour market of Suffolk.
- Whether improvements to the A12 are necessary to support growth or not, and why.
- Housing sites – how important any A12 improvements are to unlocking these.
- Employment sites – how important any A12 improvements are to unlocking these.

3.2 Findings

Key themes which emerged from this stakeholder engagement are outlined below:

3.2.1 Current view of the A12

All respondents acknowledged current issues with the A12, to varying degrees. Current problems and issues with the road were highlighted particularly in terms of:

- **Connectivity**
 - Poor connectivity between locations along the route.
 - Lowestoft in particular has issues in terms of its 'peripheral' location on the transport network.
- **Congestion**
 - Particular issues at peak commuting times.
 - Issues such as accidents or roadworks cause congestion along the route, particularly at the northern end of route, Lowestoft, and Ipswich.
 - Single carriageway sections of the road also contribute to congestion on route, with these presenting particular issues for goods vehicles and restricting ability to overtake and thus slowing traffic flows.
 - Congestion due to high volumes of particular vehicle types on route e.g. agricultural, commercial and tourist traffic.

■ Journey times

- Journey times of 1½ to 2 hours highlighted when travelling between Lowestoft and Ipswich, seen as comparatively long based on distance travelled and time taken to travel further on alternative routes (e.g. a similar journey time recorded for a longer trip between Ipswich and Cambridge).
- Unpredictable journey times, due to potential for delays on the route and variable speed limits, also an issue.
- Certain parts of the road identified as worse than others, with one respondent stating that southwards from Wickham Market the A12 is a 'decent road', whilst key pinch points were identified at Blythburgh and Farnham.

■ Accessibility

- Need for better north/south access along the route.
- Access to towns and villages along route – variation in village bypasses.

The use of alternative routes to the A12 was also highlighted due to current issues on the road, with these alternative routes across the local area including the A143, A140, A146, A47, A11 and A14 depending upon journey origins and destinations.

The overall quality of the A12 was also highlighted by one respondent, with this likened to a 'wide version of a country road' in places, which contributes to the road's issues around congestion and reliability.

Road safety was another issue highlighted, particularly in terms of variable speed limits and the combination of single and dual carriageway along the route which were linked to road users 'taking unnecessary risks when attempting to overtake on the extensive stretches of single lane highway'.

One respondent expressed reservations about the need and capacity for improvements, however they did recognise that growth in the local area would bring more traffic, which could cause potential issues along the route. However, in their view they did not see the road at present as constraining growth.

3.2.2 Impact of improvements on specific sectors

In terms of the impact of any improvements to the A12 on specific sectors and areas, local businesses and the visitor economy were highlighted as key beneficiaries of any improvements. The importance of tourism and visitors to the local economy was reinforced by respondents, with improvements to the A12 seen to help improve access to key tourist destinations (for example, Snape Maltings) and coastal resorts, to which the A12 is a key access route.

An increase in events, activities and festivals which attract a large number of visitors was also highlighted by one respondent, with those attending the Latitude Festival (capacity: 35,000⁶) held each summer since 2006 relying on the A12 for access to the site (see Figure 3.1 below) and also causing congestion for other road users at the same time.

⁶ <http://www.independent.co.uk/arts-entertainment/music/news/latitude-festival-2014-lineup-announced-8998257.html>

Figure 3.1: Latitude Festival site location



Source: Latitude Festival - <http://www.latitudefestival.com/information/general-information>

For businesses, improving access to and from employment locations was a key potential benefit of any improvement to the A12. This was discussed in terms of enabling businesses to obtain materials and send their products to market more easily, deliveries and freight and improving individuals' ability to travel for work purposes, including both regular commutes and attendance at meetings which require travel between locations along the A12 route.

Current issues with both incoming and outgoing deliveries were highlighted by one respondent as a key barrier to the growth of their business as a result of the road, with difficulties in accessing their business in Lowestoft resulting in greater cost and inconvenience. This respondent indicated that many carriers are less competitive on price when collecting from Lowestoft due to issues of accessibility, with some even being less 'interested' in collecting products from this location. Having to find alternative delivery methods such as collecting directly from component suppliers rather than arranging delivery, is therefore an inconvenience to the organisation arising from these high delivery costs.

One respondent reported issues with recruitment as a result of poor transport links, including the current A12 route. This included problems with attracting individuals with the necessary skills to work for them in their business based within Lowestoft due to issues with travelling to and from this location at present.

In addition to practical improvements which would be beneficial to local businesses in terms of access and connectivity, improving the image of locations in this area was also highlighted as a key benefit of any improvements to the A12. In particular, Lowestoft was cited as a location which would benefit from 'changing perceptions' and having its image as a 'place to do business' enhanced; with current problems with accessing the town and the impression of this as 'an out of the way place' serving as a 'disincentive for customers and investors to go to Lowestoft'. One respondent highlighted that better links into Lowestoft in particular would result in a 'greater desire for housing and business' there; again highlighting the importance of improvements to the A12 in encouraging growth.

3.2.3 Impact of improvements for Suffolk

In terms of the impact of potential improvements to the A12 upon Suffolk as a whole, respondents identified the North and East of Suffolk, coastal towns, Waveney, Lowestoft and local communities situated in the immediate vicinity of the road (5-10 miles) which rely on the A12 for access as key locations where benefits would be felt. The link between improvements to the A12 and growth in the local area was also highlighted, with energy and tourism highlighted as particular sectors within the local area which improved connectivity and accessibility could help to develop and grow.

Opening up access to the port at Lowestoft was seen as another potential outcome of improvements to the A12 by one respondent, who noted that at present land in the vicinity of the ports is being used for housing whereas improved links to the A12 would encourage more port-side activity and business.

Sustaining and improving existing key sectors within Suffolk, such as agriculture and coastal industries, was also highlighted as a potential outcome of improvements to the A12, with these industries reliant on the road network and particularly the A12 in order to obtain raw materials and export goods.

Encouraging housing growth and regeneration was identified by one respondent as another potential outcome of improvements to the A12, with current issues with the road seen as discouraging the expansion of communities and improvements therefore able to encourage house building and development.

3.2.4 Local labour market

Improvements to the A12 were identified as having particular labour market benefits at the southern end of the route, where key employment sites such as retail parks are both located and in development. Labour market benefits were also identified as potentially occurring along the A12 corridor following any improvements, both in terms of attracting employees from a wider area due to improved access to these sites and also encouraging new businesses to locate themselves on or adjacent to the A12 route.

Lowestoft in particular was identified by one respondent as a location which would benefit from improvements to the A12 in terms of the labour market, with improvements to the road seen as a step which would encourage more professionals to travel to work in the town.

A positive impact upon skills and training was also identified by one respondent as a labour market benefit of any improvements to the A12. This was related to businesses in the advanced manufacturing and engineering sector located in the centre of the A12 corridor (at sites such as Woodbridge) having issues with sending their trainees to colleges due to accessibility issues – which improvements to the A12 could help to address.

3.2.5 Growth aspirations

Most respondents acknowledged the impact of improvements to the A12 in supporting the growth aspirations of the local area. In most cases, improvements to the A12 were discussed as part of a wider package of measures required to address issues in the local area for both businesses and residents, including broadband connectivity, electrical capacity and gas supply.

The current condition of the A12 was identified as a ‘very real restriction to growth’, particularly in smaller villages and towns close to the road. This restriction was particularly noted in terms of connectivity and these locations feeling ‘isolated’ and ‘cut off from the services required for greater scales of growth’.

As well as unlocking growth, the spatial distribution of growth across Suffolk Coastal and Waveney was highlighted as another potential outcome of improvements to the A12, due to improved infrastructure and accessibility across the local area and the extent to which such improvements would ‘unlock the potential of a largely underused part of the county which falls between its two largest settlements’.

For one respondent, whilst Lowestoft was seen to be a key area in which benefits would be felt and growth realised as a result of improvements to the A12, the benefits of these improvements were also seen as having the potential to ‘ripple’ into other towns in the local area, such as the Market Towns, Beccles, Bungay and Halesworth, which were identified as key employment sites in their own right.

Framlingham was also identified by one respondent as a transport hub in the district, however this was identified as relatively poorly served by current transport links including bus and road network connections. Improving links to rural towns and economies via the A12, supported by increased rural bus provision, was therefore seen as a potential outcome of improvements to the road.

Three respondents emphasised the importance of the A12 in whether businesses decide to trade in the local area, with local businesses seen as ‘giving up’ on the route and issues with congestion potentially impacting upon whether businesses decide to situate themselves at either end of the A12 route or not. Similarly, one respondent noted that their customers’ experience of using the A12 to access their business is ‘often so bad [that] they vow not to visit again until there has been road improvements’, demonstrating this view of individuals’ giving up on the route from a customer perspective with negative consequences for businesses in the local area.

The relocation of businesses due to problems with connectivity was another related issue identified, particularly as 'once businesses relocate, they don't come back and neither do new businesses'. The impact of this both in terms of immediate job losses, and the long term growth aspirations of the local area, is therefore a key consideration and emphasises the importance of improving connectivity along this route in order to both sustain, and grow the local economy.

3.2.6 Unlocking housing sites

Improvements to the A12 were highlighted as important to unlocking housing sites within central locations, of Suffolk Coastal particularly:

- Saxmundham;
- Leiston; and
- Rendlesham.

Key considerations in terms of these potential housing sites and the impact of improvements to the A12 on their attractiveness for development identified by respondents include improved access to employment and access to local facilities and amenities.

The interconnectivity of housing and employment was highlighted by a number of respondents, with employment developments and opportunities as a result of improvements to the A12 seen to have a positive impact upon the number of housing sites brought forward locally. For one respondent, this positive impact was considered in terms of supporting the long term buoyancy of local property markets, which would in turn have wider benefits including supporting housing provision for first time buyers and the elderly. One respondent highlighted that junctions on the A12 should be a particular focus for improvement in terms of the location of housing developments, to ensure that junctions are able to handle the increased capacity which would come with new housing sites along the route. Encouraging larger, national developers to consider the area for potential development sites was also highlighted as another positive outcome of improvements to the A12 by one respondent.

Recognising the impact of housing growth upon levels of congestion was highlighted by one respondent as something that needs to be considered and mitigated through improvements to the A12, with specific reference to the Framlingham area – particularly as growth in housing could cause further congestion than exists at present if not carefully managed. This concern was also highlighted in terms of potential detrimental effects on the local area, such as discouraging business start-ups due to congestion.

One suggestion was for developers to contribute financially towards road improvements in areas where they are increasing road usage due to the location of their housing developments, which was a point highlighted by two respondents.

3.2.7 Unlocking employment sites

Unlocking employment sites was identified as another key outcome of any improvements to the A12, with possible locations which would benefit from this including:

- Lowestoft;
- Framlingham;
- Leiston;
- Rendlesham;
- Beccles;
- Bungay;
- Halesworth; and
- Southern locations within Suffolk Coastal District e.g. near Port of Felixstowe

As previously outlined, improving the connectivity and accessibility of these locations were seen as key drivers of this impact, both in terms of enabling employees to travel to and from work more easily and also improving freight movements and deliveries. One respondent highlighted the importance of improvements to the A12 in supporting local Enterprise Zone sites within Lowestoft and Beccles; highlighting the need to not only designate these as key business locations, but to take action to improve access to these sites and encourage people to work there that live to the south of Lowestoft.

3.3 Summary

In summary, findings from this stakeholder engagement exercise highlight a range of current issues with the A12 including connectivity, congestion, journey times and reliability and accessibility. Addressing these issues through improvements to the A12 is seen as having potential benefits, particularly for local businesses and the leisure and tourism sector, by improving access to key sites. Crucially, improvements to the A12 are seen as important not only in terms of delivering practical outcomes such as reducing congestion and improving accessibility, but also changing perceptions and improving the image of the area as a place to do business.

Benefits of any improvements to the A12 are expected to be felt particularly within towns and settlements directly adjacent to the road, and coastal locations which rely on this route for access. Lowestoft and Waveney were also identified as key locations where benefits may be felt, particularly in terms of employment and improving accessibility for employers and employees.

In terms of labour market benefits, improvements to the A12 are seen as potentially improving employees' ability to travel to and from work and access a wider range of employment locations, and also encouraging new businesses to locate in the area. Such employment developments are also seen as directly related to unlocking housing sites in and around the A12. Improvements to the A12 are seen as important in contributing towards the growth aspirations of the local area, in conjunction with other measures such as broadband/internet access and improvements to utilities, such as electricity and gas supplies.

Encouraging businesses to initially locate, and subsequently stay, within the local area is seen as a key objective, and potential outcome, of improvements to the A12 which would have a positive impact in terms of growth aspirations and the local economy.

Overall, improving access for both businesses and residents is a key message in terms of the potential impact of improvements to the A12 from the perspective of stakeholders consulted as part of this process.

4 Assessment of economic benefits

4.1 Introduction

Our approach has included an initial Inception Meeting with Council officers in Woodbridge to discuss the area in general followed by a site visit along the A12 providing the opportunity to understand the relationship between the highway and local settlements in more detail. Given the position that the Core Strategy is at, the site allocations work has not yet been completed which has meant we have reverted to saved policies from the previous plan and discussions with local authority planners about which sites may be allocated for development in future. Subsequently, the data relating to sites has been used to run TEAM to arrive at a high level understanding of the economic benefits that *might* arise from each site/settlement.

4.2 A12 potential transport schemes

From discussion with local authority officers in Woodbridge on 29th September 2014, it became clear that there are no major schemes proposed for the A12 at present, though there is broad recognition that the road is unsuitable for the traffic demand being placed upon it. The Suffolk Coastal Local Plan Development Plan Document does, however, contain the following improvements to the A12 linked to development and delivery of local planning policy.

Table 4.1: Infrastructure identified as necessary for the delivery of the Core Strategy

Proposal	Strategic Dependency	Lead Delivery Bodies	Estimated Cost (£)	Completion Target	Risks
East Ipswich Plan Area					
Junction improvements to A12; improvements to Foxhall Road and A1214 corridors	Delivery of strategic residential and employment development	Highways Agency, Suffolk County Council, Developer, Public transport bodies	13.75m	Short, medium and long term	Local and strategic networks unable to cope with increased levels of traffic particularly at peak time. Possible adverse impact on functioning of the port
Rest of District					
A12 – four villages improvements	Key north-south route through district	Developer	Will depend on improvements agreed	Medium / long term	Funding cannot be secured

Source: Suffolk Coastal Local Plan, Development Plan document, July 2013

The A12 is the main artery between Ipswich and Lowestoft running north-south through the district. It also links the main settlements and service centres together making it essential to the everyday functionality and future growth of the district. In addition to the proposals included in Table 4.1, a site visit to the area and a drive along the A12 highlights other highway infrastructure issues that could be addressed including:

- Sections of the road which are single carriageway and can cause hazardous driving conditions as heavy goods vehicles travel towards each other and as other drivers get frustrated at being behind slower vehicles and overtake in unsafe situations.
- Right turns which cause traffic to cross the oncoming lane ahead of oncoming traffic which can also be hazardous.
- Speed limits that change along the route (30, 40, 50 mph and national speed limit) which can slow journey times and cause confusion for some drivers.
- Roundabouts and junctions which would benefit from improvement now and whose capacity will be insufficient as traffic volumes grow in future.

4.3 Assessing economic impact

Given that there are no improvement schemes that have been worked up for the A12 at present, it is difficult to be precise about the causal links between any improvement schemes and the impact it would have on development land. However, given that we are also taking a Corridor approach to the A12 more broadly it is within this context that we have identified sites for inclusion in the assessment.

A review of available employment and housing land data and information has been undertaken followed by discussions with local authority planners to fine-tune the list of sites to be included in the analysis. The sites are listed in Tables 4.2 and 4.3 (employment) and Table 4.4 (housing) below. The analysis includes allocated and available land and does not look to future areas of growth beyond the Core Strategy period as these have not been defined. The focus is, therefore, on the land which is already in the planning system at present.

The main benefits captured through our analysis are the development of employment land, the facilitation of job creation and GVA to be generated from the people that work in those jobs. We also expect housing sites to be developed or brought forward more quickly if improvements to the A12 are made.

Our approach has been to consider the capacity of each site to support jobs and housing and to make an assumption on the proportion of the development that can be attributed to the highway improvements either through bringing sites forward more quickly, improving the quality of development on sites and removing barriers to development on sites. Given the time available for considering the causal link between transport improvements and development (and the lack of detail on potential transport improvements) we have assumed an attribution of net benefits (including multiplier effects) on each site to the potential future improvements to the A12. We have applied a rate of 5% (cautious), 15% (steady) or 25% (optimistic) attribution across all employment and housing sites.

With further detail available on the potential transport interventions a fine-grained analysis could be undertaken and this could be linked to more precise timeframes. At this juncture we have not made a detailed assessment of timescale for delivery of development although we have broadly assumed that the benefits identified would be delivered from 2020 given the time needed to develop the highway schemes and seek funding. In the interim, development would continue but the final 25% of benefits would be linked

to the road improvements which would be required as traffic flows increase and journey reliability worsens on the A12.

4.3.1 Employment benefits

The range of employment sites included in Table 4.3 is derived from the employment land review work (2013) by Suffolk Coastal District Council, a Waveney Council assessment of the Halesworth site and our previous analysis of South Lowestoft Industrial Estate and land in the Lowestoft EZ as well as around Lake Lothing. Many of the sites are small but that reflects the nature of the settlements in which they are located. Some of the larger sites (e.g. Halesworth and former RAF Bentwater) will take longer to develop but the A12 improvements are only part of the process to bring them forward which is reflected in the analysis.

Table 4.3 sets out our analysis of jobs created on individual employment sites and the broad attribution of benefits to improvements to the A12. Our primary assumption is that sites will be developed given the demand for employment space in the area and relative under supply of employment land. However, we assume that the A12 improvements will be needed to bring forward a proportion of the capacity on individual sites and that land will be developed after 2020 and over the following 10-15 years.

As employment land is developed and floorspace occupied, jobs are created and the new positions will add to the productive output of the local economy. This is measured as GVA and the GVA associated with the jobs position on each site is shown in Table 4.4 below

4.3.1.1 Assumptions

The key assumptions used in the economic impact assessment relate to land use and additionality assumptions. Land use assumptions have been undertaken using information about the development proposed. It is important to note that:

- Employment densities (using the HCA guidance as a starting point) have been adjusted where it was felt necessary based on information surrounding employment levels on other logistics sites where the team has undertaken economic impact analysis.
- A plot ratio of 0.5 has been used where there is no information available with regards the development footprint of the site.
- Floorspace footprint has been set to 85% to convert gross external areas to net internal areas (where applicable).
- Due to a lack of information available we have assumed that the benefits attributable to the A12 improvements are equivalent to the net case which we have assumed to be 25%, 15% or 5% of the gross case. This allows for displacement, substitution and leakage effects and provides a fair representation of the impact of the improvements based upon information constraints. Where this deviates, we have based this is on additional information we have received.
- For simplicity and given the lack of survey data or knowledge about which specific sectors indirect spending will relate to (which would facilitate the use of input output modelling) this study assumes a composite multiplier value of 1.3 for the benefits associated with the key developments based on the

guidance within the Additionality Guide (Additionality Guide 2014, p. 25) and similar to the multiplier value we have used on other projects in Norfolk and Suffolk.

Further assumptions for each employment site are shown in Table 4.2.

Table 4.2: Assumptions used for employment sites

Settlements and sites	Proportion of site by B-use land classifications			Information from planning applications and documents
	B1	B2	B8	
Framlingham, Station Road East	50%	50%	0%	900 sq m NIA
Framlingham, Woodbridge Road	50%	50%	0%	
Leiston, Masterford Industrial Estate	50%	50%	0%	
Leiston, Eastlands Industrial Estate	50%	50%	0%	
Leiston, Abbey Road	50%	50%	0%	
Saxmundham, Carlton Park Ind Est	50%	50%	0%	
Woodbridge, Wilford Bridge Road	50%	50%	0%	10,255 sq m NIA
Woodbridge, Melton Road	0%	100%	0%	
IEF, Martlesham Heath Business Park	50%	50%	0%	
IEF, Martlesham Heath Hi Tech Cluster, Gateway Sites	50%	50%	0%	
IEF, Martlesham Heath Hi Tech Cluster, Enterprise Village	100%	0%	0%	5,591 sq m NIA
IEF, Martlesham Heath Hi Tech Cluster, Adastral Park	100%	0%	0%	17,528 sq m NIA
IEF, Nacton Heath (Ransomes Park)	50%	50%	0%	
Rendlesham, former RAF Bentwater	50%	50%	0%	
Wickham Market, Border Cot Lane,	50%	50%	0%	
Halesworth	50%	50%	0%	1,463 jobs
South Lowestoft Industrial Estate EZ	33%	33%	33%	

Source: Mott MacDonald

IEF is Ipswich Eastern Fringe, the sub-area name describing Martlesham in the Suffolk Coastal 'Employment Land Availability Study, 2013'.

: Land-use classifications: B1 is office, B2 is light industrial and B8 is warehousing & logistics

Table 4.3: Summary of jobs (FTEs) created on employment sites and influenced by A12 improvements

Site name	Estimated range of potential attribution of A12 improvements towards development and growth (% of site capacity) (FTEs)			Selected attribution for each site based on 2014 situation FTEs	Comment and justification incorporating client comments and views on causal links
	5%	15%	25%		
Framlingham, Station Road East	2	7	12	12	Framlingham connects to the A12 via the B1119 and the B1116. Improvements to the A12 generally will improve access and connectivity to this settlement
Framlingham, Woodbridge Road	12	37	62	62	
Leiston, Masterford Industrial Estate	11	33	55	11	Leiston is the closest settlement to Sizewell and if the proposed nuclear new build goes ahead then Leiston will experience high demand for its employment land and premises. Demand from Sizewell will be the key driver for employment development though the A12 will be the primary access point to/from Leiston now and in the future
Leiston, Eastlands Industrial Estate	11	34	57	11	
Leiston, Abbey Road	29	86	143	29	
Saxmundham, Carlton Park Ind Est	36	109	182	36	The proposals for the 4VBP would improve connectivity and access for Saxmundham, but the proposals are not yet firmed up, costed or the subject of a business case.
Woodbridge, Wilford Bridge Road	28	83	138	138	Woodbridge is located very close to the A12 and improvements to the road will improve the attractiveness of the settlement as an attractive business location
Woodbridge, Melton Road	5	16	27	27	
IEF, Martlesham Heath Business Park	38	113	188	38	The growth and development of Martlesham Heath is underway and the A12 is central to its ongoing success as highway capacity and congestion issues could lead to a break being applied to growth if not addressed in future.
IEF, Martlesham Heath Hi Tech Cluster, Gateway Sites	17	50	83	17	
IEF, Martlesham Heath Hi Tech Cluster, Enterprise Village	23	68	113	23	Improvements to the A12 are therefore important for supporting growth though not a key determinant of bringing the developments forward. For this reason we have attributed a lower level of growth to the A12 improvements
IEF, Martlesham Heath Hi Tech Cluster, Adastral Park	71	212	353	71	
IEF, Nacton Heath (Ransomes Park)	163	490	817	163	

Site name	Estimated range of potential attribution of A12 improvements towards development and growth (% of site capacity) (FTEs)			Selected attribution for each site based on 2014 situation	Comment and justification incorporating client comments and views on causal links
	5%	15%	25%		
Rendlesham, former RAF Bentwater	251	752	1,254	251	Highway works needed to connect site to A12 which haven't been considered or designed yet. There is now a planning permission in place and given its facilities etc. the potential for additional employment growth is good and the "view" from members is that there is potential for more jobs. For example, we are aware that one of the owners is looking to apply for permission for replacement offices etc.
Wickham Market, Border Cot Lane,	23	70	117	117	The proposals for the 4VBP would improve connectivity and access for Wickham Market but the proposals are not yet firmed up, costed or the subject of a business case.
Halesworth	94	283	472	283	This site is large scale for the area and with improved connections to the A12 and an improved A12 it could offer a good location on the A12 corridor.
Lowestoft EZ and Lake Lothing AAP employment sites	355	1,065	1,775	1,065	We have applied a 15% attribution due to the fact that we had applied a 25% attribution to the sites in our previous A12(A47) work between Great Yarmouth and Lowestoft and feel that improving road connectivity from the south merits a further, though lesser, attribution of benefit. The figures previously identified were 1,775 jobs and £105m GVA at 25% of total site capacity.
Total FTE jobs (including indirect and induced jobs) linked to A12 improvements				2,354	This assumes demand for employment land remains high and improvements to the A12 are linked to delivering the final 5%, 15% or 25% of capacity on each site considered over 10-15 years from 2020.

Source: Mott MacDonald
 IEF is Ipswich Eastern Fringe, the sub-area name describing Martlesham in the Suffolk Coastal 'Employment Land Availability Study, 2013'.
 Columns may not add due to rounding

Table 4.4: Summary of GVA (£m) linked to jobs created on employment sites and influenced by A12 improvements

Site name	Estimated range of potential attribution of A12 improvements towards development and growth (% of site capacity) (£m GVA pa)						Selected attribution for each site based on 2014 situation £m	Comment and justification
	5%		15%		25%			
Framlingham, Station Road East	£	0.1	£	0.4	£	0.7	0.7	Framlingham connects to the A12 via the B1119 and the B1116. Improvements to the A12 generally will improve access and connectivity to this settlement
Framlingham, Woodbridge Road	£	0.7	£	2.0	£	3.4	3.4	
Leiston, Masterford Industrial Estate	£	0.6	£	1.8	£	3.0	0.6	Leiston is the closest settlement to Sizewell and if the proposed nuclear new build goes ahead then Leiston will experience high demand for its employment land and premises. Demand from Sizewell will be the key driver for employment development though the A12 will be the primary access point to/from Leiston now and in the future
Leiston, Eastlands Industrial Estate	£	0.6	£	1.8	£	3.1	0.6	
Leiston, Abbey Road	£	1.6	£	4.7	£	7.8	1.6	
Saxmundham, Carlton Park Ind Est	£	2.0	£	5.9	£	9.9	2.0	The proposals for the 4VBP would improve connectivity and access for Saxmundham, but the proposals are not yet firmed up, costed or the subject of a business case.
Woodbridge, Wilford Bridge Road	£	1.5	£	4.5	£	7.5	7.5	Woodbridge is located very close to the A12 and improvements to the road will improve the attractiveness of the settlement as an attractive business location
Woodbridge, Melton Road	£	0.3	£	0.9	£	1.5	1.5	
IEF, Martlesham Heath Business Park	£	2.0	£	6.1	£	10.2	2.0	The growth and development of Martlesham Heath is underway and the A12 is central to its ongoing success as highway capacity and congestion issues could lead to a break being applied to growth if not addressed in future.
IEF, Martlesham Heath Hi Tech Cluster, Gateway Sites	£	0.9	£	2.7	£	4.5	0.9	
IEF, Martlesham Heath Hi Tech Cluster, Enterprise Village	£	1.2	£	3.7	£	6.1	1.2	Improvements to the A12 are therefore important for supporting growth though not a key determinant of bringing the developments forward. For this reason we have attributed a lower level of growth to the A12 improvements
IEF, Martlesham Heath Hi Tech Cluster, Adastral Park	£	3.8	£	11.5	£	19.2	3.8	
IEF, Nacton Heath (Ransomes Park)	£	8.9	£	26.6	£	44.4	8.9	Improvements to the A14 junctions are more needed and relevant than anything on the A12 so difficult to take credit for the extra 633 jobs? Need your advice on what proportion of these jobs we could link to A12 improvements. We see the study working from Seven Hills then a proportion of these could be included and an issue for us to consider is that albeit the A14 will be the main route for goods, employees are likely to be from Ipswich and beyond and the availability of a good A12 will enable the circulation of traffic around the town to be better to make the site more attractive.
Rendlesham, former RAF Bentwater	£	13.6	£	40.9	£	68.1	13.6	Highway works needed to connect site to A12 which haven't been considered or designed yet.

Site name	Estimated range of potential attribution of A12 improvements towards development and growth (% of site capacity) (£m GVA pa)						Selected attribution for each site based on 2014 situation £m	Comment and justification
	5%		15%		25%			
								There is now a planning permission in place and given its facilities etc. the potential for additional employment growth is good and the “view” from members is that there is potential for more jobs. For example, we are aware that one of the owners is looking to apply for permission for replacement offices etc.
Wickham Market, Border Cot Lane,	£	1.3	£	3.8	£	6.3	6.3	The proposals for the 4VBP would improve connectivity and access for Wickham Market but the proposals are not yet firmed up, costed or the subject of a business case.
Halesworth	£	5.1	£	15.3	£	25.5	15.3	This site is large scale for the area and with improved connections to the A12 and an improved A12 it could offer a good location on the A12 corridor.
Lowestoft EZ and Lake Lothing AAP employment sites	£	21.0	£	63.0	£	105.0	63.0	We have applied a 15% attribution due to the fact that we had applied a 25% attribution to the sites in our previous A12(A47) work between Great Yarmouth and Lowestoft and feel that improving road connectivity from the south merits a further, though lesser, attribution of benefit. The figures previously identified were 1,775 jobs and £105m GVA at 25% of total site capacity.
Total GVA from jobs (including indirect and induced jobs) linked to A12 improvements							132.9	This assumes demand for employment land remains high and improvements to the A12 are linked to delivering the final 5%, 15% or 25% of capacity on each site considered over 10-15 years from 2020.

Source: Mott MacDonald
 IEF is Ipswich Eastern Fringe, the sub-area name describing Martlesham in the Suffolk Coastal 'Employment Land Availability Study, 2013'.
 Columns may not add due to rounding

4.3.2 Housing benefits

Due to the rural nature of Suffolk Coastal and Waveney (outside Lowestoft) districts there are a large number of small and smaller housing development sites and given that demand for housing in the area is generally greater than the available supply it is first worthwhile noting that there is a substantial volume of dwellings already approved for construction in the next five years. This is summarised in Table 4.5 below and reflects the importance of the A12 to supporting housing growth in the area.

Table 4.5: Housing pipeline for A12 settlements: allocated sites and anticipated development 2015/20

District	Next Five Years
Suffolk Coastal	850
Waveney	1,491
Total	2,341

Source: Mott MacDonald drawing on data from Suffolk Coastal and Waveney Councils

Suffolk Coastal settlements – Framlingham, Leiston, Saxmundham, Woodbridge, Martlesham, Rendlesham, Wickham Market
Waveney settlements – Blundeston, Carlton Colville, Halesworth, Kessingland, Lowestoft, Oulton

The housing sites included in the analysis below have been extracted from Suffolk Coastal's Strategic Housing Land Availability Assessment (SHLAA) (November 2014). Our analysis only focuses on the sites identified as being deliverable and developable. The focus is on sites considered to be developable in years 6-15 on the basis that sites that can be developed in years 0-5 will come forward without the improvements to the A12. Our primary assumption is that sites will be developed given the demand for housing in the area. However, we assume that the A12 improvements will be needed to bring forward a proportion of the capacity on individual sites and, for one site, are required to bring the site forward at all. The assumptions for each site are included in Table 4.6.

The purpose of the SHLAA is to provide an evidence base to inform planning policy and decision making at a fixed point in time. Through the plan making process there will be a review of potential sites and land which could lead to alternative and more suitable sites being allocated for housing development in future. However, the plan making process is still progressing and the SHLAA sites considered here can only be indicative of the potential future scale and location of growth in future. More certainty will come through the plan making process, in the interim the sites included here should be seen as proxy sites for future locations suited to housing development.

Table 4.6: Summary of dwellings on housing sites linked to A12 improvements

Site name	Estimated range of potential attribution of A12 improvements towards development and growth (% of site capacity) (Dwellings)			Selected attribution for each site based on 2014 situation	Comment and justification
	5%	15%	25%	Dwellings	
Martlesham, Land at and adjoining Adastral Park	100	300	500	2,000 [100% of the site capacity is attributed for this site]	This site can accommodate 2,000 dwellings and is the subject of a planning permission at present. The planning consent requires improvements to the A12 and its junctions are undertaken before development can take place. Discussions with local planning officers have suggested that the site's entire development is directly linked to highway capacity and improvements.
Leiston, Caravan park, King Georges Avenue	1	2	3	2	The same logic for the employment sites in the above tables is applied here
Leiston, Land at Mill House, Valley Rd and east of 52 Valley Rd	1	2	3	2	
Leiston, Land south of Carr Avenue	1	3	5	3	
Leiston, Rear of 9 and 11 South Close and 49 Garrett Crescent	1	2	3	2	
Leiston, Land south of Red House Lane	12	36	61	36	
Leiston, Land east of Westbury Cottages, Saxmundham Rd	4	13	22	13	
Leiston, Land adjacent to 26-72 St Margaret's Crescent	8	23	38	23	
Saxmundham, Land south of Ambleside, Mai Rd, Kelsale	1	3	5	5	The same logic for the employment sites in the above tables is applied here
Rendlesham, Land adjacent to Rockford House, Redwald Rd	0	1	2	2	The same logic for the employment sites in the above tables is applied here
Total dwellings linked to A12 improvements				2,088	This assumes demand for housing land and local housing demand remains high and improvements to the A12 are linked to delivering the final 5%, 15% or 25% of capacity on each site considered over 10-15 years from 2020.

Source: Mott MacDonald
 IEF is Ipswich Eastern Fringe, the sub-area name describing Martlesham in the Suffolk Coastal 'Employment Land Availability Study, 2013'.
 Columns may not add due to rounding

4.3.3 Temporary construction benefits (road improvements)

Constructing any improvements to the A12 will generate economic activity and support employment. In the absence of any individual schemes which have been worked up and costed (apart from the information in Table 4.1), we have based a high level assessment on three scenarios of capital investment in A12 improvements as shown in Table 4.7. Each of these will deliver a range of jobs⁷ and GVA⁸ benefits which we have expressed as gross.

Table 4.2: A12 construction benefits

Construction cost scenarios	Gross Jobs created (FTEs)	Gross GVA pa (£, million)
£20 million	15	0.7
£40 million	31	1.4
£60 million	46	2.0

Source: Mott MacDonald

4.4 Summary

On the basis of the high level assessment undertaken here, improvements to the A12 have potential to support the delivery of growth in East Suffolk and contribute to housing and employment development after 2020. In broad terms, the sites that would be influenced by the improvements could be developed at a faster pace or bring forward more jobs than initially envisaged so that an additional **2,354 jobs** and **£132.9m of GVA per annum** are supported in the area. These figures include direct, indirect (supply chain) and induced (consumption) effects and are based on the gross capacity for individual sites and assumptions over the proportion of growth at each site that could be constrained by insufficient highway infrastructure in future. We assume that the growth is to come forward from 2020 and could take 10-15 years to be realised.

In terms of housing development, an additional **2,088 dwelling units** could be built due to the highway improvements being in place and allowing sites to come forward and deliver their full allocation.

It should be noted that the assessment is high level and has been undertaken without a detailed understanding of individual road upgrade and improvement schemes that may come forward to improve the A12. Consequently, the results from our analysis could increase or decrease depending on the detail of individual schemes and the relationship they may have with development sites and bringing them forward for development in the future. The analysis also assumes that development would be influenced in the period starting from 2020 and only includes land allocated for development in the current local planning frameworks and considered developable in the SHLAA. The picture that emerges in future may be of more

⁷ For capital expenditure to employment we have assumed £130,600 is required to support 1 person year of employment and 10 years of employment equates to 1 full-time equivalent job.

⁸ GVA per construction worker is assumed to be £44,100 pa

substantive growth being supported as the plan making process could identify additional sites and locations for growth that have not been included here. It is therefore advisable that further analysis is undertaken as detail (type of improvement, location, delivery timeframe and cost) on the potential highway improvements becomes clear so that the analysis can be refined and used to inform business case and project development work.

The socio-economic profile⁹ suggests that the area is generally quite affluent and a desirable place to live. This is also borne out by the analysis earlier from the East of England Forecasting Model suggesting that there is demand for additional development land in the area than is allocated in the Core Strategies. Consequently, more growth could be delivered over and above the levels set out here but higher levels of growth would be more dependent on the A12 and the causal links between infrastructure investment and delivering of homes and jobs is even stronger. Further work to understand the causal links between transport improvements and net additional land-use and economic development improvement is required to firm up the economic benefits.

⁹ At the inception stage of the study the focus was to be on the market towns and key/local that are included in the socio-economic profile below. There are other settlements that are mentioned in the analysis (e.g. Rendlesham and Halesworth) that have been included as the study progressed

Appendices

Appendix A. Yoxford settlement profile	47
Appendix B. Framlingham settlement profile	52
Appendix C. Saxmundham settlement profile	57
Appendix D. Leiston settlement profile	62
Appendix E. Wickham Market settlement profile	68
Appendix F. Woodbridge settlement profile	73
Appendix G. Martlesham settlement profile	78
Appendix H. Consultee list	83

Appendix A. Yoxford settlement profile

A.1 Introduction

This socio-economic assessment compares Yoxford to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

A.2 Population

A.2.1 Total population and population growth

The population of Yoxford in 2011 was 1,901¹⁰. Between 2001 and 2011, there has been an increase (2%) in the population of the town¹¹. This is a much lower growth rate than all comparator levels which have experienced stronger rates of population growth at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)¹². This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

A.2.2 Population density

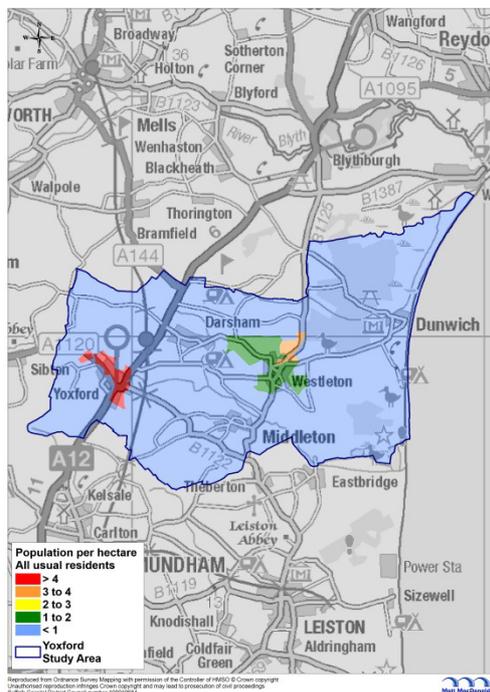
Figure A.1 shows that the higher concentrations of population density are located around Yoxford and Westleton settlement. The areas of lowest population density are located anywhere outside these two areas.

¹⁰ Source: ONS Census 2011

¹¹ Source: ONS Census 2001 and 2011

¹² SNPP 2011 (sub national population projections 2011)

Figure A.1: Population density¹³, 2011



Source: Census 2011

A.2.3 Gender balance

Between 2001 and 2011, there has been an increase (1%) in the number of males and in the number of females (3%) residing in Yoxford¹⁴. This is in contrast to all comparator areas which have experienced increases in the same period of males and females with slightly stronger growth rates for males (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Yoxford's population was 48% male and 52% female in contrast to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

¹³ ONS Census 2011

¹⁴ Source: ONS Census 2001 and 2011

A.2.4 Age breakdown

The proportion of children in Yoxford (people aged 0-15) is lower (11%) than all comparator areas (Suffolk Coastal 18%, Suffolk 18%, East 19%, England 19%) and the proportion of people aged 16-24 (5%) is below that of all comparator areas (Suffolk Coastal 9%, Suffolk 10%, East 11%, England 12%). The proportion of people aged 25-64 (49%) is lower than all comparator areas (e.g. Suffolk Coastal 50%, Suffolk 52%, East 53%, England 53%)¹⁵.

Yoxford (35%) has a higher proportion of older people (aged over 65) when compared to Suffolk Coastal (23%), Suffolk (20%), East (18%), and England (16%).

There has been growth in the over 65 age group for Yoxford between 2001 (30%) and 2011 (35%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

A.3 Housing

A.3.1 Dwelling stock by council tax band¹⁶

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

A.4 Economic Activity

A.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

A.4.2 Total employee jobs (and proportion of full time jobs)

Yoxford experienced a 116% increase in the number of employee jobs between 2003 and 2013. This was considerably higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period¹⁷.

¹⁵ ONS Census 2011

¹⁶ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

¹⁷ 2003 ABI and 2013 BRES

The number of full time jobs in Yoxford has increased by 170% between to 2003 and 2013 with 65% of the jobs being full time. The percentage of full time jobs in Yoxford in 2013 was broadly comparable to its comparator areas, and slightly lower than the national average of 68%.

A.4.3 Employee jobs by sector¹⁸

In Yoxford the sectors with the highest proportion of employees in 2012 were: wholesale (25%); health (24%); and accommodation & food services (22%). The proportion of employees in the wholesale sector in Yoxford (25%) was significantly higher than all comparator areas (Suffolk Coastal: 2%; Suffolk: 4%; East: 4%; and England: 4%). The proportion of employees in the health sector in Yoxford (24%) was also significantly higher than all comparator areas (Suffolk Coastal: 11%; Suffolk: 13%; East: 12%; and England: 13%). Yoxford also had a higher proportion of employees in the accommodation and food services sector (22%) than all comparator areas, particularly when compared to the national average (7%).

A.4.4 Job Seeker's Allowance claimants¹⁹

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Yoxford has a low proportion of JSA claimants with less than 1% of the population claiming benefits. This is below Suffolk Coastal District (1%), the county of Suffolk (2%), the region of East of England (2%) and England (3%).

A.4.5 Disability Living Allowance claimants²⁰

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Yoxford (5%) is lower than all comparator areas including at district (7%), county (7%), region (7%) and national level (8%).

A.5 Deprivation

Figure A.2, below, shows levels of deprivation in Yoxford. It illustrates that no area of the settlement falls below the fourth most deprived quintile indicating very low levels of deprivation²¹.

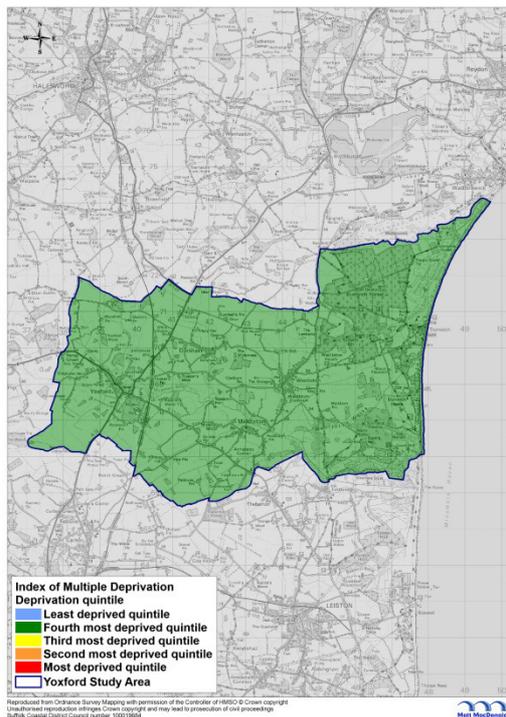
¹⁸ BRES 2013 data

¹⁹ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

²⁰ DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

²¹ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the

Figure A.2: Indices of Deprivation, overall ranking 2010



Source: IMD 2010

A.6 Summary

In summary, Yoxford, within Suffolk Coastal can be characterised as follows:

- Population – there has been a small increase in population size in Yoxford between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands, which is low when compared to comparator areas. Yoxford is characterised by having very low levels of deprivation.
- Economy – in 2013 there were 700 jobs in Yoxford, a vast increase when compared to 2003 levels. Yoxford also has a low proportion of JSA and DLA claimants compared to country, regional and national levels.

'most deprived'.

Appendix B. Framlingham settlement profile

B.1 Introduction

This socio-economic assessment compares Framlingham to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

B.2 Population

B.2.1 Total population and population growth

The population of Framlingham in 2011 was 3,342²². Between 2001 and 2011, there has been an increase (7%) in the population of the town²³. Although lower, this is broadly in line with the trend of growth at district level (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)²⁴. This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

B.2.2 Population density

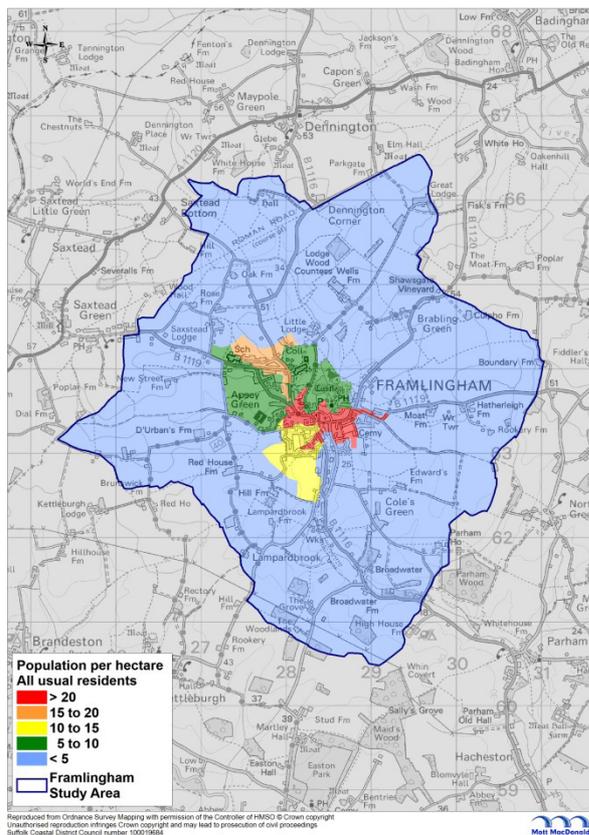
Figure B.1 shows that the higher concentrations of population density are located in the centre of the settlement. The areas of lowest population density are located outside the centre of the settlement in the fringes of the town.

²² Source: ONS Census 2011

²³ Source: ONS Census 2001 and 2011

²⁴ SNPP 2011 (sub national population projections 2011)

Figure B.1: Population density²⁵, 2011



Source: Census 2011

B.2.3 Gender balance

Between 2001 and 2011, there has been an increase (7%) in the number of males and a similar increase (7%) in the number of females residing in Framlingham²⁶. Similar levels of growth have been experienced for men and women at the comparator levels; however there appears to be stronger levels in growth of men than women at all levels (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Framlingham had slightly fewer males (48%) and slightly more females (52%) when compared to district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

²⁵ ONS Census 2011

²⁶ Source: ONS Census 2001 and 2011

B.2.4 Age breakdown

The proportion of children (people aged 0-15) and young adults (people aged 16-24) for Framlingham is broadly in line with comparator areas. The proportion of those of working age (aged 25-64) in Framlingham (44%) is low when compared to district (50%), county (52%), regional (53%) and national (53%) levels²⁷.

Framlingham (25%) has a similar proportion of older people (aged over 65) when compared to Suffolk Coastal (23%). However, both areas have a higher proportion of people in this age category when compared to county (20%), regional (18%) and national (16%) levels.

There has been growth in the over 65 age group for Framlingham between 2001 (22%) and 2011 (25%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

B.3 Housing

B.3.1 Dwelling stock by council tax band²⁸

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

B.4 Economic Activity

B.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

B.4.2 Total employee jobs (and proportion of full time jobs)

Framlingham experienced a 15% increase in the number of employee jobs between 2003 and 2013. This was much higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period²⁹.

²⁷ ONS Census 2011

²⁸ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

²⁹ 2003 ABI and 2013 BRES

The number of full time jobs in the Framlingham has increased by 8% between 2003 and 2013 with 60% of the jobs being full time in 2013. The proportion of full time jobs in Framlingham in 2013 was lower than all comparator areas, and significantly lower than the national average of 68%.

B.4.3 Employee jobs by sector³⁰

In Framlingham the sectors with the highest proportion of employees in 2013 were: education (25%) manufacturing (13%); retail (12%); and health (8%). Framlingham has a higher proportion of employees working in the education sector (25%) compared to all comparator areas (district 10%, county 10%, regional 10%, national 10%). Framlingham also has a higher proportion of employees working in the manufacturing sector (13%) compared to comparator areas (district 6%, county 10%, regional 9% and national 8%). The proportion of employees working in the retail sector (12%) is in line with the district but higher than the county (11%), regional (11%) and national (10%) figures.

B.4.4 Job Seeker's Allowance claimants³¹

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Framlingham has a low proportion of JSA claimants with 1% of the population claiming benefits. This is lower than the proportion in Suffolk Coastal (1%), Suffolk (2%), East of England (2%) and England (3%).

B.4.5 Disability Living Allowance claimants³²

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Framlingham (5%) is lower than the proportion of DLA claimants for all comparator areas including at district (7%), county (7%), region (7%) and national level (8%).

B.5 Deprivation

Figure B.2, below, shows that the most deprived areas in Framlingham are within the centre of the settlement, however the entire area does not fall below the fourth most deprived quintile illustrating very low levels of deprivation within the settlement³³.

³⁰ BRES 2013 data

³¹ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

³² DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

³³ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the

Appendix C. Saxmundham settlement profile

C.1 Introduction

This socio-economic assessment compares Saxmundham to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

C.2 Population

C.2.1 Total population and population growth

The population of Saxmundham in 2011 was 4,913³⁴. Between 2001 and 2011, there has been an increase (22%) in the population of the town³⁵. This is a much higher growth rate than all comparator levels which also have experienced strong rates of population growth at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)³⁶. This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

C.2.2 Population density

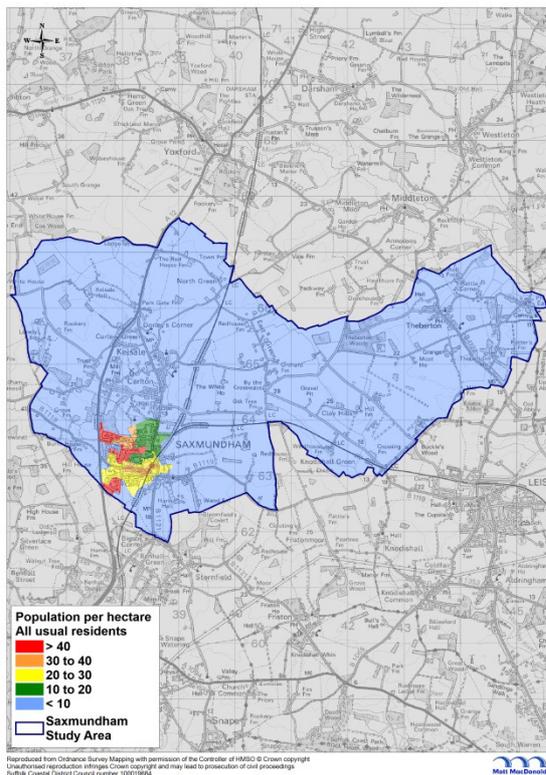
Figure C.1 shows that the higher concentrations of population density are located in the south parts of the settlement. The areas of lowest population density are located to the east and north of Saxmundham.

³⁴ Source: ONS Census 2011

³⁵ Source: ONS Census 2001 and 2011

³⁶ SNPP 2011 (sub national population projections 2011)

Figure C.1: Population density³⁷, 2011



Source: Census 2011

C.2.3 Gender balance

Between 2001 and 2011, there has been an increase (21%) in the number of males and in the number of females (22%) residing in Saxmundham³⁸. This is in contrast to all comparator areas which have experienced increases in the same period of males and females with slightly stronger growth rates for males (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Saxmundham's population was 48% male and 52% female in contrast to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female: 51%).

³⁷ ONS Census 2011

³⁸ Source: ONS Census 2001 and 2011

C.2.4 Age breakdown

The proportion of children (people aged 0-15) is broadly in line with comparator areas (18%) and the proportion of people aged 16-24 (8%) is slightly below that of comparator areas. The proportion of people aged 25-64 (48%) is lower than all comparator areas (e.g. Suffolk Coastal 50%, Suffolk 52%, East 53%, England 53%)³⁹.

Saxmundham (26%) has a higher proportion of older people (aged over 65) when compared to Suffolk Coastal (23%) Suffolk (20%), East (18%) and England (16%).

There has been growth in the over 65 age group for Saxmundham between 2001 (23%) and 2011 (26%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

C.3 Housing

C.3.1 Dwelling stock by council tax band⁴⁰

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

C.4 Economic Activity

C.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

C.4.2 Total employee jobs (and proportion of full time jobs)

Saxmundham experienced a 17% increase in the number of employee jobs between 2003 and 2013. This was much higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period⁴¹.

³⁹ ONS Census 2011

⁴⁰ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

⁴¹ 2003 ABI and 2013 BRES

The number of full time jobs in Saxmundham has seen 0% growth between to 2003 and 2013, with 56% of the jobs being full time in 2013. The percentage of full time jobs in Saxmundham in 2013 was lower than all comparator areas, and significantly lower than the national average of 68%.

C.4.3 Employee jobs by sector⁴²

In Saxmundham the sectors with the highest proportion of employees in 2013 were: health (26%); retail (22%); and manufacturing (12%). The proportion of employees in the health sector in Saxmundham (26%) was significantly higher than all comparator areas (Suffolk Coastal: 11%; Suffolk: 13%; East: 12%; and England: 13%). The proportion of employees in the retail sector in Saxmundham (22%) was also significantly higher than all comparator areas (Suffolk Coastal: 12%; Suffolk: 11%; East: 11%; and England 10%). Saxmundham also has a higher proportion of employees working in the manufacturing sector (12%) than all comparator areas (Suffolk Coastal: 6%; Suffolk: 10%; East: 9%; and England: 8%).

C.4.4 Job Seeker's Allowance claimants⁴³

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Saxmundham has a low proportion of JSA claimants with 1% of the population claiming benefits. This is in line with Suffolk Coastal District (1%), but lower than the county of Suffolk (2%), the region of East of England (2%) and England (3%).

C.4.5 Disability Living Allowance claimants⁴⁴

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Saxmundham (11%) is higher than all comparator areas including at district (7%), county (7%), region (7%) and national level (8%).

C.5 Deprivation

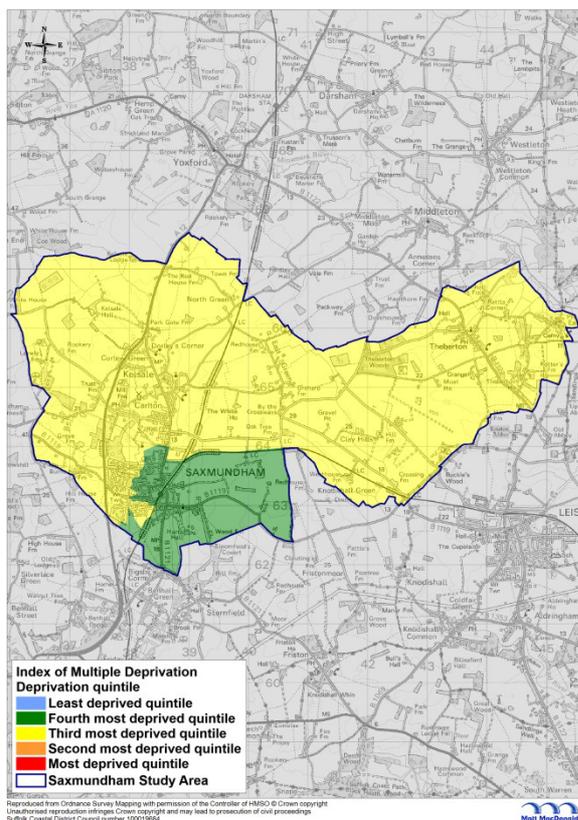
Figure C.2, below, shows that the most deprived areas in Saxmundham are towards the northern half of the settlement however the entire area does not fall below the third most deprived quintile illustrating low levels of deprivation within the settlement⁴⁵.

⁴² BRES 2013 data

⁴³ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

⁴⁴ DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

Figure C.2: Indices of Deprivation, overall ranking 2010



Source: IMD 2010

C.6 Summary

In summary, Saxmundham, within Suffolk Coastal can be characterised as follows:

- Population – there has been a large increase in population size in Saxmundham between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands, which is low when compared to comparator areas. Saxmundham is characterised by having very low levels of deprivation.
- Economy – in 2013 there were 1,500 jobs in Saxmundham, an increase compared to 2003 levels. Saxmundham also has a lower proportion of JSA claimants compared to country, regional and national levels but a higher proportion of DLA claimants.

⁴⁵ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the 'most deprived'.

Appendix D. Leiston settlement profile

D.1 Introduction

This socio-economic assessment compares Leiston to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

D.2 Population

D.2.1 Total population and population growth

The population of Leiston in 2011 was 6,360⁴⁶. Between 2001 and 2011, there has been an increase (2%) in the population of the town⁴⁷. This is lower than the growth rates for the comparator levels in the same period at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)⁴⁸. This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

D.2.2 Population density

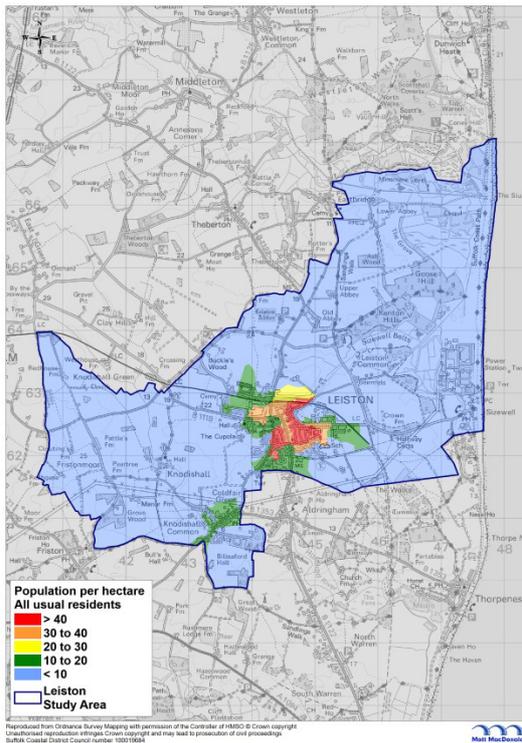
Figure D.1 shows that the higher concentrations of population density are located in the centre of the Leiston to the east of Knodishall. The areas of lowest population density are located outside the centre of the settlement in areas such as Knodishall in the west and in the eastern area of the settlement.

⁴⁶ Source: ONS Census 2011

⁴⁷ Source: ONS Census 2001 and 2011

⁴⁸ SNPP 2011 (sub national population projections 2011)

Figure D.1: Population density⁴⁹, 2011



Source: Census 2011

D.2.3 Gender balance

Between 2001 and 2011, there has been an increase (3%) in the number of males and a similar but smaller increase (1%) in the number of females residing in Leiston⁵⁰. This same trend has been experienced at all comparator levels (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Leiston had slightly fewer males (49%) and slightly more females (51%) similar to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

⁴⁹ ONS Census 2011

⁵⁰ Source: ONS Census 2001 and 2011

D.2.4 Age breakdown

The proportion of children (people aged 0-15), and young adults (people aged 16-24) is broadly in line with comparator levels. The proportion of those aged 25-64 in Leiston (50%) is in line with the district but lower than when compared to county (52%), regional (53%) and national (53%) levels⁵¹.

Leiston (22%) has a similar proportion of older people (aged over 65) when compared to Suffolk Coastal (23%). However, both areas have a higher proportion of people in this age category when compared to county (20%), regional (18%) and national (16%) levels.

There has been growth in the over 65 age group for Leiston between 2001 (20%) and 2011 (22%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

D.3 Housing

D.3.1 Dwelling stock by council tax band⁵²

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

D.4 Economic Activity

D.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

D.4.2 Total employee jobs (and proportion of full time jobs)

Leiston experienced an 11% increase in the number of employee jobs between 2003 and 2013. This was much higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period⁵³.

⁵¹ ONS Census 2011

⁵² Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

⁵³ 2003 ABI and 2013 BRES

The number of full time jobs in Leiston has increased by 11% between 2003 and 2013 with 72% of the jobs being full time in 2013. The proportion of employee jobs in Leiston which were full time in 2013 was higher than all comparator areas (district (66%), county (64%) region (65%) and national (68%)).

D.4.3 Employee jobs by sector⁵⁴

In Leiston the sectors with the highest proportion of employees in 2012 were: mining quarrying and utilities (35%), education (9%), retail (8%), and business administration and support services (8%). Leiston has a higher proportion of employees working in the mining quarrying and utilities sector (35%) compared to all comparator areas (district 2%, county 1%, regional 1%, national 1%). Although there is a high proportion of employees working in the education sector in Leiston (8%) this is lower than all comparator areas, where at district, county, region and national level this is 10%. The same is true for retail which has a smaller proportion of employee jobs when compared to all comparator areas, particularly when compared to the proportion for the district (12%). The proportion of employee jobs working in the business administration and support services sector in Leiston is higher than the equivalent for the district (5%), but lower than other comparator areas (county 9%, region 10%, and national 9%).

D.4.4 Job Seeker's Allowance claimants⁵⁵

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Leiston has a low proportion of JSA claimants with 1% of the population claiming benefits. This is in line with Suffolk Coastal District (1%); but lower than the county of Suffolk (2%), the region of East of England (2%) and England (3%).

D.4.5 Disability Living Allowance claimants⁵⁶

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Leiston (8%) is higher than the proportion of DLA claimants for all comparator areas including at district (7%), county (7%), and regional level (7%) but in line with the national level (8%).

⁵⁴ BRES 2013 data

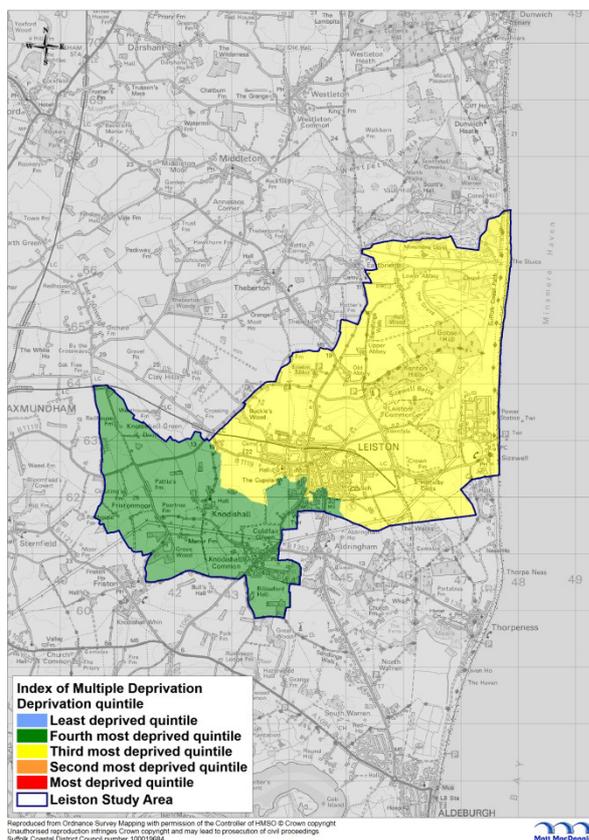
⁵⁵ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

⁵⁶ DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

D.5 Deprivation

Figure D.2, below, shows that the most deprived areas in Leiston are towards the east of the settlement however the entire area does not fall below the third most deprived quintile illustrating low levels of deprivation within the settlement⁵⁷.

Figure D.2: Indices of Deprivation, overall ranking 2010



Source: IMD 2010

D.6 Summary

In summary, Leiston, within Suffolk Coastal can be characterised as follows:

⁵⁷ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the 'most deprived'.

- Population – there has been a small increase in population size in Leiston between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands, which is low when compared to comparator areas. Leiston is characterised by having low levels of deprivation.
- Economy – in 2013 there were 2,600 jobs in Leiston, a small increase compared to 2003 levels. Leiston also has a low proportion of JSA claimants compared to country, regional and national levels. It has a high proportion of DLA claimants when compared to all comparator areas except at national level.

Appendix E. Wickham Market settlement profile

E.1 Introduction

This socio-economic assessment compares Wickham Market to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

E.2 Population

E.2.1 Total population and population growth

The population of Wickham Market in 2011 was 2,156⁵⁸. Between 2001 and 2011, there has been a small decrease (-4%) in the population of the settlement⁵⁹. This is a much lower growth rate than all comparator levels which have experienced strong positive rates of population growth at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)⁶⁰. This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

E.2.2 Population density

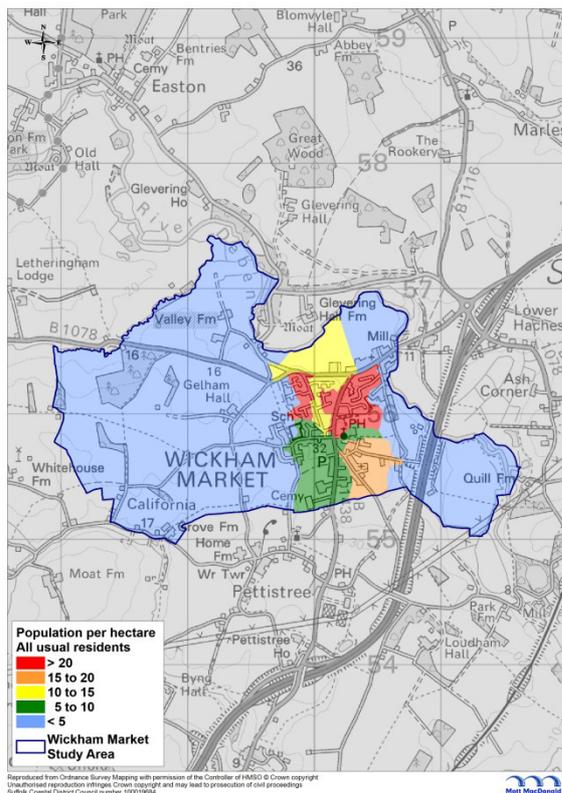
Figure E.1 shows that the higher concentrations of population density are located in the central areas of the settlement. The areas of lowest population density are located on the western and eastern side of the settlement.

⁵⁸ Source: ONS Census 2011

⁵⁹ Source: ONS Census 2001 and 2011

⁶⁰ SNPP 2011 (sub national population projections 2011)

Figure E.1: Population density⁶¹, 2011



Source: Census 2011

E.2.3 Gender balance

Between 2001 and 2011, there has been a decrease (-4%) in the number of males and in the number of females (-3%) residing in Wickham Market⁶². This is in contrast to all comparator areas which have experienced increases in the same period of males and females with slightly stronger growth rates for males (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Wickham Market's population was 48% male and 52% female in contrast to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

⁶¹ ONS Census 2011

⁶² Source: ONS Census 2001 and 2011

E.2.4 Age breakdown

The proportion of children in Wickham Market (people aged 0-15) is lower (16%) than all comparator areas (Suffolk Coastal 18%, Suffolk 18%, East 19%, England 19%) and the proportion of people aged 16-24 (9%) is below that of all comparator areas except Suffolk Coastal (Suffolk 10%, East 11%, England 12%). The proportion of people aged 25-64 (46%) is lower than all comparator areas (e.g. Suffolk Coastal 50%, Suffolk 52%, East 53%, England 53%)⁶³.

Wickham Market (29%) has a higher proportion of older people (aged over 65) when compared to Suffolk Coastal (23%) Suffolk (20%), East (18%) and England (16%).

There has been growth in the over 65 age group for Wickham Market between 2001 (24%) and 2011 (29%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

E.3 Housing

E.3.1 Dwelling stock by council tax band⁶⁴

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

E.4 Economic Activity

E.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

E.4.2 Total employee jobs (and proportion of full time jobs)

Wickham Market experienced a 19% increase in the number of employee jobs between 2003 and 2013. This was much higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period⁶⁵.

⁶³ ONS Census 2011

⁶⁴ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

⁶⁵ 2003 ABI and 2013 BRES

The number of full time jobs in Wickham Market has increased by 20% between 2003 and 2013, with 53% of the jobs being full time in 2013. The proportion of full time jobs in Wickham Market in 2013 was lower than all comparator areas, and significantly lower than the national average of 68%.

E.4.3 Employee jobs by sector⁶⁶

In Wickham Market the sectors with the highest proportion of employees in 2013 were: retail (22%); health (21%); education (10%); and construction (10%). The proportion of employees in the retail sector in Wickham Market (22%) was significantly higher than all comparator areas (Suffolk Coastal: 12%; Suffolk: 11%; East: 11%; and England: 10%). The proportion of employees in the health sector in Wickham Market (21%) was also significantly higher than all comparator areas (Suffolk Coastal: 11%; Suffolk: 13%; East: 12%; and England: 13%). The proportion of employees in the education sector in Wickham Market was the same as all comparator areas (10%). The proportion of employees in construction in Wickham Market (10%) was significantly higher than all comparator areas (Suffolk Coastal: 3%; Suffolk: 4%; East: 5%; and England: 4%).

E.4.4 Job Seeker's Allowance claimants⁶⁷

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Wickham Market has a moderate proportion of JSA claimants with 2% of the population claiming benefits. This is higher than Suffolk Coastal District (1%), but in line with the county of Suffolk (2%), the region of East of England (2%) and England (3%).

E.4.5 Disability Living Allowance claimants⁶⁸

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Wickham Market (8%) is higher than the district (7%), county (7%), and region (7%) but in line with the national level (8%).

E.5 Deprivation

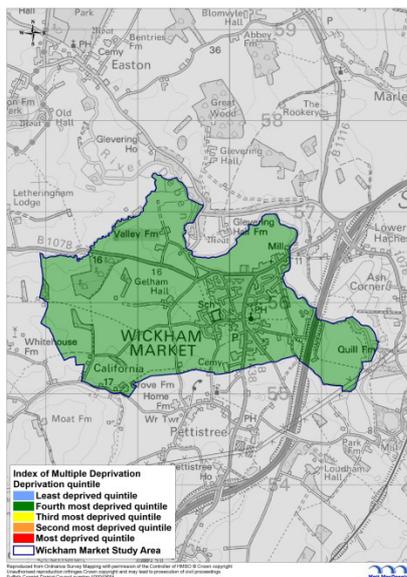
Figure E.2, below, shows levels of deprivation in Wickham Market. It shows the whole of the settlement is within the fourth most deprived quintile indicating very low levels of deprivation⁶⁹.

⁶⁶ BRES 2013 data

⁶⁷ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

⁶⁸ DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

Figure E.2: Indices of Deprivation, overall ranking 2010



Source: IMD 2010

E.6 Summary

In summary, Wickham Market, within Suffolk Coastal can be characterised as follows:

- Population – there has been a small decrease in population size in Wickham Market between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands which is low when compared to comparator areas. Wickham Market is characterised by having very low levels of deprivation.
- Economy – in 2013 there were 500 jobs in Wickham Market, an increase compared to 2003 levels. Wickham Market also has a moderate proportion of JSA claimants and DLA claimants compared to country, regional and national levels.

⁶⁹ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the 'most deprived'.

Appendix F. Woodbridge settlement profile

F.1 Introduction

This socio-economic assessment compares Woodbridge to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

F.2 Population

F.2.1 Total population and population growth

The population of Woodbridge in 2011 was 11,341⁷⁰. Between 2001 and 2011, there has been an increase (3%) in the population of the town⁷¹. This is a much lower growth rate than all comparator levels which have experienced stronger rates of population growth at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)⁷². This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

F.2.2 Population density

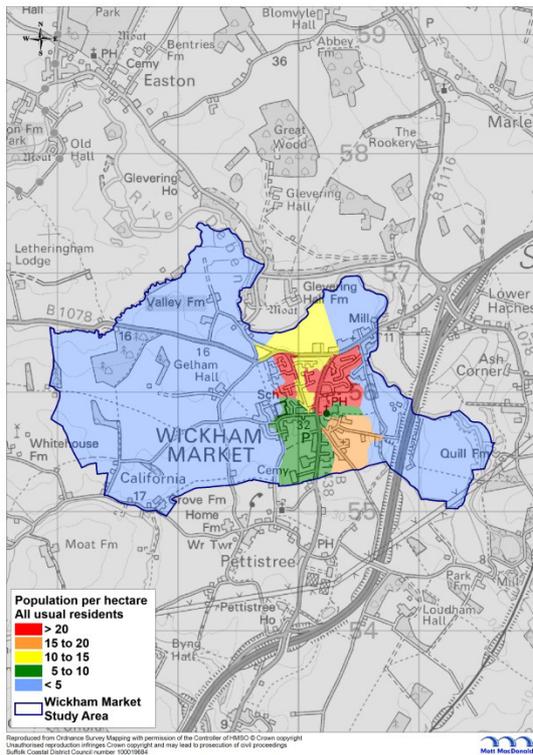
Figure F.1 shows that the higher concentrations of population density are located in the central areas of the settlement. The areas of lowest population density are located on the western and eastern side of the settlement.

⁷⁰ Source: ONS Census 2011

⁷¹ Source: ONS Census 2001 and 2011

⁷² SNPP 2011 (sub national population projections 2011)

Figure F.1: Population density⁷³, 2011



Source: Census 2011

F.2.3 Gender balance

Between 2001 and 2011, there has been an increase (3%) in the number of males and in the number of females (4%) residing in Woodbridge⁷⁴. This is in contrast to all comparator areas which have experienced increases in the same period of males and females with slightly stronger growth rates for males (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Woodbridge's population was 47% male and 53% female in contrast to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

⁷³ ONS Census 2011

⁷⁴ Source: ONS Census 2001 and 2011

F.2.4 Age breakdown

The proportion of children in Woodbridge (people aged 0-15) is lower (17%) than all comparator areas (Suffolk Coastal 18%, Suffolk 18%, East 19%, England 19%) and the proportion of people aged 16-24 (8%) is below that of all comparator areas except (Suffolk Coastal 9% Suffolk 10%, East 11%, England 12%). The proportion of people aged 25-64 (48%) is lower than all comparator areas (e.g. Suffolk Coastal 50%, Suffolk 52%, East 53%, England 53%)⁷⁵.

Woodbridge (28%) has a higher proportion of older people (aged over 65) when compared to Suffolk Coastal (23%) Suffolk (20%), East (18%) and England (16%).

There has been growth in the over 65 age group for Woodbridge between 2001 (25%) and 2011 (28%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

F.3 Housing

F.3.1 Dwelling stock by council tax band⁷⁶

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C. This is compared to 66% of the dwellings in the East of England and 66% in England.

F.4 Economic Activity

F.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

F.4.2 Total employee jobs (and proportion of full time jobs)

Woodbridge experienced an 8% increase in the number of employee jobs between 2003 and 2013. This was slightly higher than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period⁷⁷.

⁷⁵ ONS Census 2011

⁷⁶ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

⁷⁷ 2003 ABI and 2013 BRES

The number of full time jobs in Woodbridge has decreased by 5% between to 2003 and 2013 with 53% of the jobs being full time in 2013. The proportion of full time jobs in Woodbridge in 2013 was lower than all comparator areas, and significantly lower than the national average of 68%.

F.4.3 Employee jobs by sector⁷⁸

In Woodbridge the sectors with the highest proportion of employees in 2012 were: retail (17%); education (17%); health (12%); and accommodation & food services (11%). The proportion of employees in the retail sector in Woodbridge (17%) was higher than all comparator areas (Suffolk Coastal: 12%; Suffolk: 11%; East: 11%; and England: 10%). The proportion of employees in the education sector in Woodbridge (17%) was also higher than all comparator areas (all 10%). The proportion of Woodbridge residents employed in the health sector (12%) was broadly similar to all comparator areas (Suffolk Coastal: 11%; Suffolk: 13%; East: 12%; and England: 13%). Woodbridge also had a higher proportion of employees in the accommodation and food services sector (11%) than all comparator areas, particularly when compared to the national average (7%).

F.4.4 Job Seeker's Allowance claimants⁷⁹

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Woodbridge has a low proportion of JSA claimants with 1% of the population claiming benefits. This is in line with Suffolk Coastal District (1%), but lower than the county of Suffolk (2%), the region of East of England (2%) and England (3%).

F.4.5 Disability Living Allowance claimants⁸⁰

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Woodbridge (7%) is in line with all comparator areas including at district (7%), county (7%), region (7%) but slightly lower than the national level (8%).

F.5 Deprivation

Figure F.2, below, shows levels of deprivation in Woodbridge and illustrates that the highest levels of deprivation are in the north-eastern and western areas of the settlement. The lowest levels of deprivation

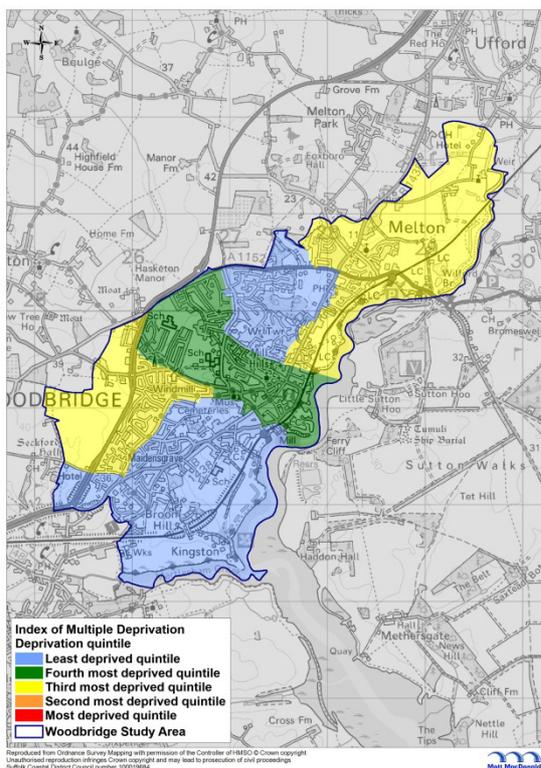
⁷⁸ BRES 2013 data

⁷⁹ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

⁸⁰ DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

can be identified in the northern and southern areas of the settlement. No area of the settlement falls below the third most deprived quintile indicating low levels of deprivation⁸¹.

Figure F.2: Indices of Deprivation, overall ranking 2010



Source: IMD 2010

F.6 Summary

In summary, Woodbridge, within Suffolk Coastal can be characterised as follows:

- Population – there has been a small increase in population size in Woodbridge between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands, which is low when compared to comparator areas. Woodbridge is characterised by having very low levels of deprivation.
- Economy – in 2013 there were 5100 jobs in Woodbridge, an increase when compared to 2003 levels. Woodbridge also has a moderate proportion of JSA and DLA claimants compared to country, regional and national levels.

⁸¹ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the 'most deprived'.

Appendix G. Martlesham settlement profile

G.1 Introduction

This socio-economic assessment compares Martlesham to the following comparator levels: district (Suffolk Coastal); county (Suffolk); regional (East of England); and national (England).

G.2 Population

G.2.1 Total population and population growth

The population of Martlesham in 2011 was 4,897⁸². Between 2001 and 2011, there has been a decrease (-1%) in the population of the town⁸³. This contrasts with all comparator levels which have experienced strong growth rates at district (8%), at county (9%), regional (9%) and national (8%) levels.

The population of Suffolk Coastal is set to steadily increase from 124,590 in 2011 to 137,095 to 2021 (10% growth rate)⁸⁴. This is above the projected population increase for Suffolk (7%), and England (9%) but in line with the projected population increase for the East of England (10%).

G.2.2 Population density

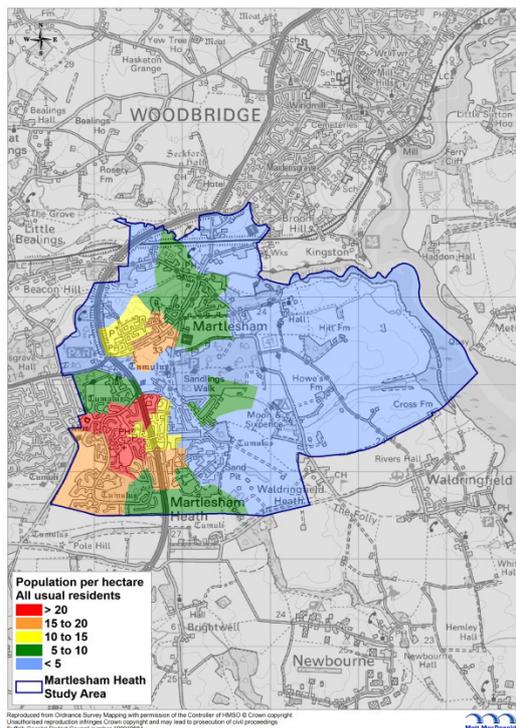
Figure G.1 shows that the higher concentrations of population density are located in the south western and the northern parts of the settlement. The areas of lowest population density are located on the eastern side of the settlement.

⁸² Source: ONS Census 2011

⁸³ Source: ONS Census 2001 and 2011

⁸⁴ SNPP 2011 (sub national population projections 2011)

Figure G.1: Population density⁸⁵, 2011



Source: Mott MacDonald

G.2.3 Gender balance

Between 2001 and 2011, there has been a decrease (-1%) in the number of males and small increase (1%) in the number of females residing in Martlesham⁸⁶. This is in contrast to all comparator areas which have experienced increases in the same period of males and females with slightly stronger growth rates for males (e.g. England experienced an increase of 9% in males compared to 8% in females). In 2011, Martlesham had equal proportions of males (50%) and females (50%) in contrast to comparator areas at district (male: 49%; female: 51%), county (male: 49%; female: 51%), region (male: 49%; female: 51%), and national levels (male: 49%; female 51%).

⁸⁵ ONS Census 2011

⁸⁶ Source: ONS Census 2001 and 2011

G.2.4 Age breakdown

The proportion of children (people aged 0-15) (16% for Martlesham) is slightly below that of comparator areas (e.g. Suffolk Coastal 18%, Suffolk 18%, East 19%, England 19%) and the same is true for the proportion of people aged 16-24 (e.g. 8% for Martlesham, Suffolk Coastal 9 %, Suffolk 10%, East 11%, England 12%). The proportion of those aged 25-64 in Martlesham (52%) is broadly in line with the county (52%) region (53%) and national (53%) comparators but higher than the district (50%)⁸⁷.

Martlesham (24%) has a similar proportion of older people (aged over 65) when compared to Suffolk Coastal (23%). However, both areas have a higher proportion of people in this age category when compared to county (20%), regional (18%) and national (16%) levels.

There has been growth in the over 65 age group for Martlesham between 2001 (20%) and 2011 (22%). This follows a pattern also experienced in the comparator areas, apart from England where the proportion of those aged over 65 has remained the same.

G.3 Housing

G.3.1 Dwelling stock by council tax band⁸⁸

Suffolk Coastal District has a dwelling profile which is skewed towards the higher value Council Tax bands when compared with comparator areas, with 58% per cent of its dwellings placed into valuation bands A to C . This is compared to 66% of the dwellings in the East of England and 66% in England.

G.4 Economic Activity

G.4.1 Employment

Employment – measured as employee jobs – provides an insight into how the local economy of an area is performing. This section focuses on total employee jobs and the sector breakdown of employment in the areas.

G.4.2 Total employee jobs (and proportion of full time jobs)

Martlesham experienced a 3% decrease in the number of employee jobs between 2003 and 2013. This was much lower than all comparator areas which all experienced strong rates of growth than the district (5%), county (6%), regional (7%) and national (6%) growth rates of employee jobs for the same period⁸⁹.

⁸⁷ ONS Census 2011

⁸⁸ Department for Communities and Local Government (CLG) and Valuation Office Agency (VOA), April 2014

⁸⁹ 2003 ABI and 2013 BRES

The number of full time jobs in Martlesham has decreased by 4% between 2003 and 2013 with 77% of the jobs being full time in 2013. The proportion of employee jobs in Martlesham which were full time in 2013 was higher than all comparator areas (district (66%), county (64%) region (65%) and national (68%)).

G.4.3 Employee jobs by sector⁹⁰

In Martlesham the sectors with the highest proportion of employees in 2012 were: information and communication (45%), retail (15%) and public administration and defence (13%). Martlesham has a significantly higher proportion of employees working in the information and communication sector (45%) compared to all comparator areas (district 8%, county 3%, regional 3%, national 4%). The same is true for retail when compared to comparator areas (district 12%, county 11%, region 11% and national 10%) and public administration and defence (district 4%, county 4%, region 4%, national 5%).

G.4.4 Job Seeker's Allowance claimants⁹¹

Job Seeker's Allowance (JSA) is a benefit paid to people who are able to work and actively looking for work or not working more than sixteen hours per week. It is representative of the unemployment situation in an area as it reflects the supply of labour that is ready and able for work.

Martlesham has a low proportion of JSA claimants with 1% of the population claiming benefits. This is in line with Suffolk Coastal District (1%), but lower than the county of Suffolk (2%), the region of East of England (2%) and England (3%).

G.4.5 Disability Living Allowance claimants⁹²

Disability Living Allowance (DLA) is a tax-free benefit available to disabled adults and children to assist with the extra living costs that may be incurred from being disabled. DLA can be claimed whether claimants are in work or not, so long as the claim is made before they reach 65 years of age.

The proportion of DLA claimants for Martlesham (6%) is lower than the proportion of DLA claimants for all comparator areas including at district (7%), county (7%), region (7%) and national level (8%).

G.5 Deprivation

Figure G.2, below, shows that the most deprived areas in Martlesham are towards the east and north of the settlement however the entire area does not fall below the fourth most deprived quintile illustrating low levels of deprivation within the settlement⁹³.

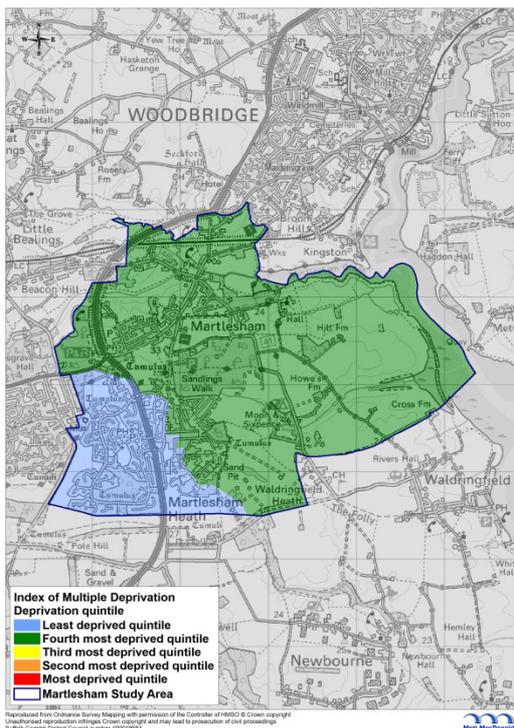
⁹⁰ BRES 2013 data

⁹¹ JSA data based on February 2014 and February 2004 ONS data for benefit claimants and 2011 Census

⁹² DLA data based on February 2014 and February 2004 ONS data for DLA claimants and 2011 Census

⁹³ Deprivation is illustrated using the 'Indices of Multiple Deprivation' (IMD). This ranks each of the c.34,000 lower super output areas (LSOAs – the smallest unit of administrative geography) in England and divides them into quintiles from the 'least deprived' to the

Figure G.2: Indices of Deprivation, overall ranking 2010



Source: Mott MacDonald

G.6 Summary

In summary, Martlesham, within Suffolk Coastal can be characterised as follows:

- Population – there has been a small decrease in population size in Martlesham between 2001 and 2011. Between 2011 and 2021 the district of Suffolk Coastal is expected to grow by around 10%.
- Social and community – in 2014 Suffolk Coastal had 58,750 dwellings, 58% of which were in Council Tax bands A to C, the lowest value bands which is low when compared to comparator areas. Martlesham is characterised by having very low levels of deprivation.
- Economy – in 2013 there were 6,300 jobs in Martlesham, a small decline compared 2003 levels. Martlesham also has a low proportion of JSA and DLA claimants compared to country, regional and national levels.

'most deprived'.

Appendix H. Consultee list

Table H.1: Consultees spoken to as part of the study

Engagement Method	Name	Organisation	Job Role
Telephone Interview	Stephen Britt	Anchor Storage	Managing Director
Telephone Interview	Richard Perkins	Chambers of Commerce - Lowestoft and Waveney	Board Member – Suffolk Development Agency Commercial Property Asset Management
Email	Councillors	Framlingham Town Council	Councillors
Telephone Interview	Robert Eburne	Hopkins Homes	Strategic Land and Planning Manager
Email	Chris Harrod	Harrod UK Limited	Chief Executive
Email	Grant Heal	Persimmon Homes & Charles Church (Anglia)	Strategic Planning Team
Telephone Interview	Nick Burfield	Suffolk Chamber of Commerce	Policy Director
Telephone Interview	Derek Oldham	Suffolk County Council	East Area Highway Manager
Telephone Interview	Jai Raithatha/Mike Dowdall	Suffolk County Council	Economic Development
Telephone Interview	Paul Pitcher	Wellington Construction	Managing Director