# Ipswich Borough & Suffolk Coastal District

# Retail and Commercial Leisure Town Centre Study

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Volume 1 of 3 – Main Report





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IPSWICH BOROUGH COUNCIL

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# 1.0 Introduction

## 1.1 Instruction

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

- Ipswich Retail and Commercial Leisure Study, 2010;
- Appraisal of Ipswich Town Centre Opportunity Areas, 2013; and
- Suffolk Coastal Retail Capacity Refresh, 2015.

1.1.2 This Study will be used to inform the emerging aligned Local Plan Reviews for the two authorities. The authorities are embarking upon the production of aligned Local Plan Reviews covering the period 2016-2036, alongside neighbouring Babergh and Mid Suffolk District Councils. Other key purposes of the study are to: provide evidence for the review of growth strategies to take account of retail and leisure relationships and change in retail and leisure provision and demand; and inform town centre strategies and future investment plans.

1.1.3 The study explores retail and commercial leisure need over the plan period to 2036 and provides an up to date review of the performance of the town centres in the Council areas. The aims and objectives for the Study include consideration of the following:

- Identification of quantitative and qualitative retail requirements for the towns;
- Identification of quantitative and qualitative commercial leisure requirements for the towns;
- Identification of the scale and nature of new hotel development required to meet future business and leisure tourism needs;
- The undertaking of health check assessments of the vitality and viability of Ipswich, Woodbridge, Felixstowe, Saxmundham, Aldeburgh, Framlingham, and Leiston, town centres;
- An assessment of the nature, scale, vitality and viability of district centres within Ipswich;
- An analysis and review of out-of-centre retail and leisure provision;
- An analysis of the retail and leisure relationships within Ipswich and Suffolk Coastal areas; and
- The provision of recommendations in relation to addressing potential retail, commercial leisure and hospitality requirements.

1.1.4 Key contributions to the above objectives have been a number of items of new empirical research. First, we have commissioned NEMS Market Research to undertake a new a shopping survey of 1,600 households. The Study Area for the survey comprises 16 zones which are based on postcode areas grouped around one or more of the existing town centres.

1.1.5 The second area of empirical research has been in relation to the assessment of the health of the 7 town centres across the two council areas and the 11 district centres within Ipswich. This exercise has incorporated land use surveys of these defined centres, along with a review of health check indicators and an appraisal of the qualitative results of the household survey data.

1.1.6 In addition, as part of the assessment of key town centre health issues, engagement, including a workshop, has taken place with key stakeholders in the two council areas to obtain views on, *inter alia*, existing town centre strengths, weaknesses, opportunities and threats; potential suggested town centre improvements; and retailer/leisure provider requirements/needs.

1.1.7 The Study is also informed by a hotel managers survey undertaken in January/February 2017 which will inform the hotel needs assessment part of the study. The survey seeks to establish baseline information and details of existing hotels in the two council areas including occupancy rates.

1.1.8 Finally, the Study is also informed by industry research having regard to published recognised retail, leisure and hotel data as well as discussions with hotel, leisure and retail operators with regard to potential demand/requirements in the two councils' administrative areas.

## 1.2 Structure of Study

1.2.1 Our study is structured as follows:

- Section 2 outlines the current national and local planning policy context for retail and leisure development issues in the Council areas;
- Section 3 provides a context for the Study by outlining the current and emerging key retail and leisure trends in the UK;
- Section 4 sets out the key market research which informs the Study;
- Section 5 analyses retail market shares and patterns in the Study Area;
- Section 6 sets out our qualitative assessment/overview of the vitality and viability of Ipswich Town Centre and the district centres within Ipswich Borough;
- Section 7 set out a qualitative assessment/overview of the vitality and viability of Suffolk Coastal district town centres and the district centres of Wickham Market and Kesgrave;

- Section 8 provides our assessment of the need for further convenience and comparison goods floorspace in the two council areas over the assessment period;
- Section 9 sets out our assessment of the need for further leisure floorspace in the two council areas over the assessment period;
- Section 10 provide our assessment of hotel needs in the two council areas;
- Section 11 provides an assessment of potential development sites in Ipswich;
- Section 12 summarises our key findings and sets out our recommendations for the Ipswich Borough Council area; and
- Section 13 summarises our key findings and sets out our recommendations for the Suffolk Coastal District Council area.

# 2.0 Planning Policy Context

## 2.1 Introduction

2.1.1 Given that this Study seeks to provide evidence to assist in the production of the Councils' Local Plans, it is important to review existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study and how it may impact upon the production of future development plan policy. We also summarise Ipswich Borough and Suffolk Coastal's adopted and emerging planning policies, insofar as they are relevant to retail, commercial leisure and town centre matters.

## 2.2 National Planning Policy Framework (NPPF)

2.2.1 The National Planning Policy Framework (NPPF) was published in March 2012. The NPPF sets out the Government's planning policies for England and how these are expected to be applied. It sets out the Government's requirements for the planning system only to the extent that it is relevant, proportionate and necessary to do so.

2.2.2 The main theme of the NPPF is that there should be 'a presumption in favour of sustainable development'. In terms of plan-making, it is stated that local planning authorities should positively seek opportunities to meet the development needs of their area, with an emphasis on Local Plans having sufficient flexibility to adapt to rapid change.

2.2.3 In terms of economic development, it is set out within the NPPF's core principles that planning should proactively drive and support economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made to objectively identify and then meet the business and other development needs of an area, with positive responses made to wider opportunities for growth.

2.2.4 Paragraph 8 recognises that economic growth can secure higher social and environmental standards, and well-designed buildings and places can improve the lives of people and communities. Therefore, to achieve sustainable development, economic, social and environmental gains should be sought jointly and simultaneously through the planning system. The planning system should play an active role in guiding development to sustainable solutions.

2.2.5 The NPPF stresses the Government's commitment to securing economic growth in order to create jobs and prosperity, with paragraph 17 stating that the planning system should proactively drive and support sustainable economic development.

2.2.6 Paragraph 19 indicates that planning should operate to encourage and not to act as an impediment to sustainable growth, and that significant weight should be placed on the need to support economic growth through the planning system. The NPPF seeks to ensure that local planning authorities plan proactively to meet the development needs of business and support an economy fit for the 21st century.

2.2.7 The NPPF still recognises the need to promote the vitality and viability of towns and cities through the promotion of competition and growth management during the plan period. Paragraph 23 of the NPPF provides guidance for local planning authorities in drawing up Local Plans, it indicates that they should:

- recognise town centres as the heart of their communities and pursue policies to support their vitality and viability;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centre. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.2.8 Paragraph 24 requires local planning authorities to adopt a sequential approach to the consideration of planning applications for main town centre uses that are not in an existing centre or in accordance with an up-to-date Local Plan. The following paragraph 25 indicates that that the sequential approach should not apply to applications for small scale rural offices or other small scale development.

2.2.9 Paragraph 26 indicates that local planning authorities should require an impact assessment for retail, leisure and office development outside of town centres which are not in accordance with an up-to-date Local Plan and if the development is over a proportionate, locally set threshold. Where there is no locally defined threshold, the default threshold will be 2,500 sq m.

2.2.10 Paragraph 27 indicates that where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on the vitality and viability of a town centre or on existing, planned, committed investment in a centre it should be refused.

2.2.11 The NPPF also recognises that retail activity should still, where possible, be focused in existing town centres. Retail and leisure proposals which cannot be accommodated in or adjacent to the town centre will have to satisfy a dual impact test and the sequential test.

## 2.3 Ensuring the Vitality of Town Centres Planning Practice Guidance

2.3.1 Ensuring the Vitality of Town Centres National Planning Practice Guidance was published in March 2014 and replaces the previous Planning for Town Centres Practice Guidance. It provides a more concise summation of how retail and main town centre planning policy is to be applied in practice. However, the objectives of the Practice Guidance remain comparable with those of its predecessor, with there being a stated requirement for local planning authorities to plan positively and support town centres to generate local employment, promote beneficial competition within and between town centres, and create attractive and diverse places for people to want to live, visit and work.

2.3.2 The Practice Guidance requires local planning authorities to fully assess and plan to meet needs for main town centre uses through the adoption of a 'town centre first' approach. Paragraphs 002 and 003 confirm that this should be delivered through a positive vision or strategy which is communicated through the development plan. The strategy should be facilitated through active engagement with the private sector and other interested organisations (including Portas Pilot organisations, Town Teams and so on). Any strategy should be based on evidence which clarifies the current state of town centres and opportunities to meet development needs and support centres' vitality and viability.

2.3.3 Such strategies should seek to address the following matters:

- the appropriate and realistic role, function and hierarchy of town centres in the area over the plan period, including an audit of the vitality and viability of existing town centres and their ability to accommodate new development;

- consideration of the vision for the future of each town centre and the most appropriate mix of uses to enhance overall vitality and viability;
- the evaluation of the town centre to assess whether it can accommodate the scale of assessed need, and if it cannot, evaluating different policy options to help accommodate the need;
- the timeframe for new retail floorspace to be delivered;
- what other complementary strategies are necessary or appropriate to enhance the town centre to deliver the vision in the future; and
- the consideration of how car parking provision be enhanced and both parking charges and enforcement be made proportionate, in order to encourage town centre vitality.

2.3.4 Paragraph 005 of the Practice Guidance identifies a series of key indicators which are of relevance in assessing the health of a centre over time. Paragraph 005 goes on to state that not all successful town centre regeneration initiatives have been retail led or focused on substantial new development, but have instead involved improvements such as renewed public realm, parking, and accessibility and other partnership mechanisms.

2.3.5 Paragraph 007 identifies the importance of planning for tourism as an important component of any overall vision and indicates that local planning authorities should consider specific tourism needs (including locational or operational requirements) and opportunities for tourism to support local services, vibrancy and the built environment.

2.3.6 Paragraph 009 reaffirms the town centre first policy in the form of the sequential test, which requires local planning authorities to undertake an assessment of candidate sites' availability, suitability and viability when preparing their Local Plan. Such an assessment should also consider the scale of future needs and the type of land needed to accommodate main town centre uses.

## 2.4 Housing and Economic Development Needs Assessment Planning Practice Guidance

2.4.1 The Government has issued further Practice Guidance to provide specific instruction in respect of the undertaking of needs assessments (including those for main town centre uses). Paragraph 032 of the Practice Guidance states that plan makers should consider forecasts of quantitative and qualitative need based on a range of data which is current and robust. Local planning authorities will need to take account of business cycles and make use of forecasts and surveys to assess employment land requirements.

## 2.5 Local Planning Policy Context

2.5.1 The relevant development plans for the two Council areas are:

Ipswich Borough

- The Ipswich Local Plan 2011-2031 (February 2017) consisting:
  - Core Strategy and Policies Development Plan Document Review
  - Site Allocations and Policies (incorporating IP-One Area Action Plan) Development Plan Document.

Suffolk Coastal District

- The Suffolk Coastal District Core Strategy and Development Management Policies (July 2013)
- The Site Allocations and Area Specific Policies Development Plan Document (January 2017)
- The Felixstowe Peninsula Area Action Plan (January 2017).

### Ipswich Local Plan

Core Strategy

*Policy CS2 – Location and Nature of Development*

2.5.2 The policy identifies that major new retail development will be focussed in Ipswich's Central Shopping Area (which comprises the Primary, Secondary and Specialist Shopping Frontage Zones) and that new office, hotel, cultural and leisure development will be focussed in Ipswich Town Centre.

*Policy CS3 – IP-One Area Action Plan*

2.5.3 The policy confirms the Council will prepare and implement an IP-One Area Action Plan (AAP) incorporated within the Site Allocations and Policies development plan document to plan for significant change in central Ipswich. The AAP will include policies defining the extent of the Waterfront and Ipswich Village and allocate development sites.

2.5.4 The AAP was adopted by the Council alongside the Core Strategy in February 2017.

*Policy CS14 – Retail Development and Main Town Centre Uses*

2.5.5 The policy identifies that the Council will promote high quality investment and development in Ipswich Central Shopping Area (CSA) to maintain and enhance its attraction and market share and strengthen its regional role. Within the district centres and local centres, the policy states retail development of a scale appropriate to their size, function and catchment will be encouraged.

2.5.6 The policy identifies that the Council will direct other town centre uses including offices, leisure, arts, culture, tourism and hotel developments into the town centre area, with some provision being appropriate in the CSA and the Waterfront, in recognition of the area's good accessibility by public transport, cycle and foot.

*Policy DM20 – Central Shopping Area (CSA)*

2.5.7 This policy relates to development proposals within the CSA which comprises the Primary, Secondary and Specialist Shopping Frontage Zones. Class A1 retail should remain the predominant use in the Central Shopping Area. A2-A4 uses will be permitted where they will not exceed 15% of a group of identified ground floor frontages in the Primary Shopping Frontage Zone. Whilst A2-A5 uses and other main town centre uses will be supported within Secondary and Specialist Shopping Frontage Zones, provided they don't exceed 25% of a group of identified ground floor frontages and does not create a concentration of more than 30 metres of non-A1 retail frontage in Secondary Shopping Areas and within Specialist Shopping Areas do not exceed 40% of a group of identified ground floor frontages.

2.5.8 The policy identifies that planning permission will not be granted for the use of a ground floor unit to a use falling outside Classes A1 to A5 within the Primary Shopping Frontage Zones and to a use outside Classes A1 to A5 and other main town centre uses in Secondary Shopping Frontage Zones.

*Policy DM21 – District and Local Centres*

2.5.9 Policy DM21 sets out the criteria for development proposals of local shops and community facilities within the District and Local Centres. Proposals for change of use from A1 to A2-A5, betting shops, payday loan shops, D1 uses and sui generis uses appropriate to the centre, will be permitted where they will not exceed 40% of the total identified ground floor frontage, of this 40% no more than 20% will be permitted for A4 or A5 uses. The policy, lower case text, states that additional foodstores within district and local centres should not exceed 1,500sq m net.

*Policy DM22 – Town Centre Uses Outside the Central Shopping Area*

2.5.10 The policy supports the development of non-retail town centre uses, including leisure, recreation, culture, offices, residential and tourism uses within the town centre but outside of the Central Shopping Area. This area should be considered before edge or out-of-centre locations for these town centre uses.

*Policy DM23 – Retail Proposals Outside Defined Centres*

2.5.11 This policy relates to retail proposals outside of defined centres. It requires all out-of-centre retail proposals above 200sq m net floorspace to demonstrate that they: are of an appropriate scale; comply with the sequential approach policy test; will not have a significant adverse impact on existing defined centres; and are accessible by a range of transport options.

Site Allocations and Policies (incorporating IP-One Area Action Plan) Development Plan Document (DPD)

*Policy SP1 – The protection of allocated sites*

2.5.12 Policy SP1 introduces measures to reserve allocated sites for the uses proposed. The policy clarifies that the Central Shopping Area remains the focus for significant retail development, although proposals for retail development elsewhere will be permitted on sites allocated for other uses subject to satisfying sequential and impact tests and there being no significant conflict with the delivery of other requirements of the Plan.

*Policy SP7 – Land allocated for leisure uses or community facilities*

2.5.13 The policy identifies the following sites for leisure uses or community facilities:

- IP005 – Former Tooks Bakery, Old Norwich Road – health centre to be provided as part of residential led mixed-use development;
- IP010a – Co-Op Depot, Felixstowe Road – primary school extension to be provided part of residential development;
- IP258 – Land at University of Suffolk – new primary school to be provided as part of the Education Quarter;
- IP150b – Land at Ravenswood – sports park comprising cycle track; and
- IP260 – former Odeon Cinema – leisure uses to complement the Regent.

*Policy SP10 – Retail Site Allocation*

2.5.14 The policy refers to Site IP040, land at Westgate, which is allocated for A1 retail-led mixed use development, which could include other uses providing retail is the main land use. Westgate is the main site allocated for new large scale and large floor plate retail development during the plan period.

2.5.15 The policy, lower case text, also refers to the 'Mint Quarter site' (also known as Cox Lane regeneration area) which has previously been identified for retail development. Retail development has not come forward to date due to viability and deliverability issues in achieving a major retail-led scheme across the whole site.

*Policy SP11 – The Waterfront*

2.5.16 This policy identifies that the Waterfront remains the focus for regeneration within central Ipswich and that new development should contain a mix of uses including residential, community, office, arts, culture, open space, boat related and tourism activities. The policy states that where the Waterfront area overlaps with the town centre at the northern quays, all main town centre uses will be permitted with the exception of retail uses.

*Policy SP13 – Ipswich Village*

2.5.17 Policy SP13 relates to Ipswich Village which is located to the west of the IP-One Area. Ipswich Village is identified as a focus for regeneration as a mixed-use neighbourhood of residential use, open spaces and main town centre uses, excluding retail, where they accord with Core Strategy Review Policy DM22.

*Policy SP14 – Arts, Culture and Tourism*

2.5.18 Policy SP14 supports the retention and enhancement of existing facilities providing arts, cultural and tourism facilities, including visitor accommodation throughout the Borough. It identifies that new facilities will be supported where they are focussed within the town centre boundary or Waterfront area.

*Site Allocations - Opportunity Areas*

2.5.19 Chapter 6 of the Plan identifies the following Opportunity Areas and highlights potential development opportunities for each site as summarised below:

- Opportunity Area A – Island site – mixed-use development including residential, marina moorings and related industry, employment, small scale retail, cafes and restaurants, heritage/ cultural based visitor activities and waterfront promenade. It represents a key development opportunity in the regenerated Waterfront.
- Opportunity Area B – Merchant Quarter – mixed-use development including residential, offices/ businesses, cafes and restaurants and small scale retail.
- Opportunity Area C – Mint Quarter/ Cox Lane Regeneration Area - predominantly non-retail mixed use development comprising residential, shoppers car parking, public open space, cafe/ restaurant uses and some retail on western part of site.
- Opportunity Area D – Education Quarter and surrounding area – development to include Higher and Further Education Use, residential development, hotel, car parking, small scale retail, cafe/restaurant and offices/ businesses.
- Opportunity Area E – Westgate – retail led mixed-use development to include retail, residential, cafe/ restaurant uses, shoppers car parking and improved cultural network.
- Opportunity Area F – River and Princes Street Corridor – office-led mixed use development including leisure uses, car parking, residential uses adjacent to river and enhanced environment from railway station.

## Suffolk Coastal Local Plan

<u>Core Strategy and Development Management Policies</u>

2.5.20 The Core Strategy and Development Management Policies DPD sets out the strategic vision for the district and communities. It also includes the Development Management Policies used in the determination of planning applications. The policies of relevance to this study are summarised below.

*Strategic Policy SP6 – Regeneration*

2.5.21 The policy identifies economic regeneration to be a priority in the following areas:

- The resort of Felixstowe – as a result of changing holiday patterns and to lessen reliance on the port;
- Rural areas – as a result of changes within the agricultural economy;
- Leiston – decommissioning of Sizewell A has added to impact of decline in local engineering;
- The town centres – concern exists over the impact of out-of-town stores as well as the growth of Ipswich retail economy; and
- Saxmundham – limited employment and community facilities has led to outward commuting.

*Policy SP9 – Retail Centres*

2.5.22 This policy states that emphasis within the district is on maintaining and enhancing the vitality and viability of existing retail centres. The policy identifies the retail hierarchy with town centres and district centres. The town centres identified are as follows:

- Felixstowe;
- Aldeburgh;
- Framlingham;
- Leiston;
- Saxmundham;
- Woodbridge

2.5.23 Wickham Market is identified as a district centre (alongside Cavendish Park, Felixstowe; Ropes Drive West, Kesgrave; The Square, Martlesham Heath; High Street, Walton (Felixstowe); Broadland Ways, Rushmere St Andrew; Sycamore Drive, Rendlesham). The policy states that the scale of new floorspace provision associated with each of the above is set out in the settlement hierarchy.

*Strategic Policy SP19 – Settlement Policy*

2.5.24 This policy sets out the settlement hierarchy for the District as follows:

<u>Major Centres</u>

- Felixstowe
- Area East of Ipswich (i.e Kesgrave, Martlesham Heath, Purdis Farm, Rushmere St Andrew)

Towns

- Aldeburgh
- Framlingham
- Leiston
- Saxmundham
- Woodbridge (with parts of Melton and Martlesham).

2.5.25 Major Centres are described as being a sub-regional centre for commercial and social facilities. Towns are identified as being a focal point for employment, shopping and community facilities.

2.5.26 The policy also identifies Key Service Centres, Local Service Centres, Other Villages and Countryside. Wickham Market is identified as a Key Service Centre, described as being a settlement which provides an extensive range of specified facilities, including shops, local employment opportunities, meeting place and public transport access to a town.

*Strategic Policy SP20 – Eastern Ipswich Policy Area*

2.5.27 The area to the east of Ipswich is identified as capable of accommodating significant levels of development under Strategic Policy SP20. The policy notes that the wider expansion of existing retail and leisure provision is likely to result in unacceptable impact on the vitality and viability of Woodbridge Town Centre situated only 4 miles away. Opportunities for small scale local/ district level retail provision as part of a new housing allocation would however be supported.

*Strategic Policy SP21 – Felixstowe with Walton and the Trimley Villages*

2.5.28 The policy identifies the aim to achieve a thriving seaside town and port, attractive to residents and welcoming to visitors who wish to experience the town's unique qualities including vibrant and diverse retail offer, cafe culture and healthy outdoor lifestyle. Expansion of the retail, service and other facilities available within the town centre will be supported to meet needs or residents and visitors.

*Strategic Policy SP22 – Aldeburgh*

2.5.29 The policy identifies the strategy for Aldeburgh includes retaining and protecting its close-knit historic character without suffering the effects of 'town-cramming', retaining and enhancing its retail and service offer and providing sufficient services and facilities, particularly health and education. It also seeks to benefit from traffic management measures in the High Street to provide an improved physical environment, whilst retaining its role as a tourist centre and providing a range of accommodation and visitor attractions.

*Strategic Policy SP23 – Framlingham*

2.5.30 The policy identifies that the strategy for Framlingham is to promote and enable it to remain a largely self-sufficient market town which maintains a healthy retail and service officer, has sufficient services and facilities (particularly health, education and community facilities) and to retain its role as a tourist centre, offering a range of accommodation and visitor attractions and facilities.

*Strategic Policy SP24 – Leiston*

2.5.31 The strategy for Leiston is to consolidate and build on the role the town plays in provision of leisure, education and employment facilities for other neighbouring market towns. In relation to retail and leisure, the policy seeks to maintain the vibrancy of the town, concentrating efforts on retaining and improving the quality and range of facilities available and an improved physical environment.

*Strategic Policy SP25 – Saxmundham*

2.5.32 For Saxmundham, the strategy is to consolidate its role as a market town providing for a range of retail, social and community needs of its residents and rural hinterland. It also seeks to identify opportunities to undertake works to upgrade the physical environment within the town centre and improve pedestrian and cycle links to the town centre and railway station.

*Policy SP26 – Woodbridge*

2.5.33 The policy identifies the strategy for Woodbridge to balance opportunities with the acknowledged physical and environmental constraints and to maintain and enhances its roles as the principle market town within the district, an employment centre and tourist destination. The policy seeks to achieve appropriate growth on a range of sites across the town, incorporate a range uses at the riverside to create a vibrant environment, enhance links between the town centre, Market Hill and the riverside and achieve an enhanced town centre through retention and enhancement of its anchor stores and encouragement of small scale independent retail businesses.

Site Allocations & Area Specific Policies Development Plan Document

2.5.34 The Site Allocations and Area Specific Policies DPD covers the majority of the district excluding the area covered by the Felixstowe Peninsula Area Action Plan and a number of parishes whom are preparing neighbourhood plans. It identifies sites for different types of development, defines boundaries and includes other policies. The policies and allocations of relevance to this study are summarised below.

*SSP28 - Aldeburgh & SSP29 - Saxmundham*

2.5.35 These policies relate to Aldeburgh and Saxmundham respectively and state main town centre uses will be encouraged and directed to sites within the town centres. It identifies that within the Primary Shopping Frontage a high proportion of A1 retail will be encouraged and retained at ground floor level. The Secondary Shopping Frontage will provide a mixture of town centre uses, whilst retaining a proportion of A1 uses at ground floor level.

2.5.36 Outside of the Primary and Secondary shopping frontages, a flexible approach will be taken to future uses and development opportunities which sustain and enhance the vitality and viability of the towns.

*SSP30 – District Centres*

2.5.37 Policy SSP30 identifies two district centres: (1) Ropers Drive West, Kesgrave; and (2) Wickham Market Village Centre. Local shopping opportunities and facilities will be supported and safeguarded where possible. Proposals which seek to increase shopping opportunities and facilities within district centres will be supported where they complement the existing role of the centres and do not have a detrimental impact on town centres across the district.

*Policy SSP31 – Local Centres*

2.5.38 Policy SSP31 identifies two local centres: (1) Bixley Farm, Rushmere St Andrew; and (2) Saxmundham Road, Aldeburgh). The policy notes that they provide a small range of shops and other local services which help meet the needs of residents.

*Policy SSP33 – Snape Maltings*

2.5.39 This policy relates to the Snape Maltings and identifies that further use of the venue for arts, recreation and tourism related uses with associated retail and crafts activities and accommodation will be supported.

<u>Felixstowe Peninsula AAP</u>

2.5.40 The Felixstowe Peninsula AAP covers the area south east of the A12/A14 dual carriageway interchange, it primarily covers the settlements of Bucklesham, Felixstowe, Kirton, Trimley St Martin and Trimley St Mary. The AAP contains policies and site allocations for this area. The policies and allocations of relevance to this study are summarised below.

*Policy FPP13 – Felixstowe Town Centre*

2.5.41 Policy FPP13 states that main town centre uses in Felixstowe will be directed to sites and buildings within the town centre boundary, with retail A1 uses directed to the Primary Shopping Frontage in the first instance. Proposals which retain and enhance the individual shopping character of Felixstowe will be welcomed and the expansion of the Shared Space Scheme between Orwell Road and Bent Road will be supported where proposals enhance the vitality and viability of the centre.

*Policy FPP14 – Retail Frontages*

2.5.42 Policy FPP14 defines the Primary Shopping Frontage, within which a high proportion of A1 retail uses will be encouraged and retained. The Secondary Shopping Frontage is also defined and will provide a mix of town centre uses, whilst retaining a proportion of A1 uses at ground floor level. Outside of the Primary and Secondary shopping frontages a flexible approach will be taken to future uses and development opportunities which sustain and enhance the vitality and viability of Felixstowe.

*Policy FPP15 – Primary Shopping Area*

2.5.43 The policy states retail uses will be concentrated within the Primary Shopping Area. Uses which do not undermine the approach to retaining A1 retail uses in the Primary and Secondary Shopping frontage will also be encouraged.

*Policy FPP16 – District Centres*

2.5.44 The policy identifies District Centres located within the AAP boundary and states that they will provide shops and other local services to meet the needs of residents in the local area. Proposals which seek to increase shopping opportunities and facilities within the district centres will be supported where they complement the role of these centres and do not have a detrimental impact on the town centres across the district.

*Policy FPP23 – Car Parking*

2.5.45 Redevelopment of surface level car parking sites within the physical limits boundary will be supported where the proposal provides, as a minimum the same level of visitor car parking provision at the same location as currently available.

*Policy FPP24 – Holiday Accommodation*

2.5.46 The policy identifies the need to strengthen Felixstowe as a seaside destination and proposals for holiday accommodation will be encouraged where proposals will have a positive impact on the local economy. Proposals for permanent tourist accommodation will be supported where they comply with the identified criteria, one of which includes no material adverse impact on the environment or residential amenity.

2.5.47 Objective 8 of the Felixstowe Peninsula AAP is to expand tourism, retail and service facilities across the Peninsula to meet the needs of residents and visitors.

### Relevant Emerging Neighbourhood Plans

2.5.48 There are a number of relevant emerging Neighbourhood Development Plans (NDPs) within the Suffolk Coastal District which, once adopted, will form part of the development plan. The Leiston and Framlingham Neighbourhood Plans were both made in March 2017.

Framlingham Neighbourhood Plan

2.5.49 Policies of relevance are:

- Policy FRAM13 - relates to proposals for tourism development and accommodation which will be supported where: there are demonstrable economic and social benefits; there is no significant detrimental impact on the existing community; and adequate parking is provided.
- Policy FRAM18 – identifies Framlingham Town Centre as the preferred location for development of new town centre uses. Where it is demonstrated town centre sites are not suitable or viable edge-of-centre sites may be considered appropriate.

2.5.50 The plan states that settlements surrounding Framlingham have little or no retail provision and rely on the services and facilities within Framlingham. It also identifies pinch points and pedestrian walkway routes serving Framlingham town centre.

2.5.51 There are no site allocations relevant to retail or commercial leisure use.

Leiston Neighbourhood Plan

2.5.52 Relevant policies are:

- Policy TC1 - identifies Leiston Town Centre as the preferred location for development of new town centre uses.
- Policy TC2 - identifies a site (Land at High Street) on the High Street for mixed use redevelopment. The policy requires a mix of uses including retail, leisure and residential, creation of a 'market square', physical links to the existing town centre and no less public car parking provision than presently provided.

2.5.53 Objective 4 of the plan seeks to make Leiston Town Centre a place that more people want to visit for their shopping and leisure time.

Martlesham Neighbourhood Area

2.5.54 Martlesham Parish Council have submitted their neighbourhood plan to Suffolk Coastal District Council ahead of it being submitted for independent examination. Representation were invited between July and August 2017.

2.5.55 The submission stage plan identifies the unique situation at Martlesham with two main retail areas; the village centre (or 'Square' within Martlesham Heath area) and the out of town shopping area (Martlesham Retail Park). Reference is also made to the proposal for 2,000 new homes and high tech business park at Adastral Park and the influence this will have on Martlesham.

2.5.56 The plan identifies two areas within Martlesham Heath Village which could come forward for development and offer the opportunity to strengthen retail and community facilities.

Other Relevant Neighbourhood Plans

2.5.57 Wickham Market Parish Council are in the process of preparing a NDP and received area and forum approval from SCDC in January 2016. No draft plan has been produced to date.

2.5.58 Woodbridge Town Council was in the process of preparing a NDP, however in September 2016 the Town Council decided to cease preparation of the plan. It was agreed that the Town Council would work with Suffolk Coastal District Council through its Local Plan review to update planning policies for the neighbourhood planning area.

## 2.6 Summary

2.6.2 This section of the study has reviewed existing national planning policy of pertinence to retail, leisure and town centre matters to explore the context for the Study.

2.6.3 National planning policy highlights the need to promote the vitality and viability of town centres through a town centre first approach and a defined hierarchy of centres. Applicants for main town centre uses are required to pass the sequential approach to site selection and provide a full assessment of the impact on the vitality and viability of protected centres. The two Councils development plans follow the general trend of the most recent national policy guidance, identifying a hierarchy of centres and town centre first approach.

# 3.0 Current & Emerging Trends

## 3.1 Introduction

3.1.1 In order to set out the wider context for the Study and inform our advice on the need for additional retail and leisure floorspace in Ipswich and Suffolk Coastal areas, we provide an overview of prevailing retail and commercial leisure trends below. Our overview draws on recognised retail and leisure data sources and is referenced where appropriate.

## 3.2 Polarisation of Retailing

3.2.1 The retail property landscape across the UK has evolved significantly over the past 50 years, from post-war redevelopment in town centres, through to the emergence of retail warehouse parks and out-of-town regional shopping malls. For most of this period, the retail sector has experienced considerable expenditure growth, which has been attributed to a number of factors, including greater disposable income, availability of credit, new technology and a general overall increase in our standard of living. However, recent economic conditions have had a clear impact on expenditure and per capita convenience goods spending has actually reduced in recent years. The way in which goods are purchased has also altered due to the increased popularity of 'e-tailing', which now claims more than one in every ten pounds spent in the UK.

3.2.2 In recent years, shoppers have been increasingly prepared to travel in order to access a greater choice of shops and the type of leisure facilities which are more commonly available in larger towns and cities. As a consequence, larger town/city centres (with a regional or sub-regional role) have tended to perform relatively strongly, but a number of smaller towns (particularly those proximate to larger centres) have fared less well. The performance of many smaller towns has also been particularly impacted upon by the recession and the growth of internet shopping, which has resulted in many operators believing that they can achieve appropriate nationwide coverage with a smaller number of stores.

3.2.3 Many retailers are focusing their development programmes on the provision of large flagship stores in strategic locations. They are focused on a much smaller portfolio of stores to cover main markets and to complement online sales. New and emerging retailers frequently target no more than 50 stores in key locations and, as a consequence, this trend is having an impact on take-up levels in shopping centres. Indeed, many town centre schemes have been put on hold or scaled down in size, and with expenditure growth forecast being relatively low in the medium term, retailers are likely to remain cautious about store development.

3.2.4 It is also evident that retailers are choosing to develop stores in the most cost effective/strategic locations, with out-of-centre retail parks/locations, with free car parking and lower rents, being particularly attractive locations. A number of traditional town centre retailers now operate out-of-centre formats, including Next (Next Home, Next Home & Fashion), John Lewis (John Lewis At Home), TK Maxx (Homesense, TK Maxx) and the Arcadia Group (through its Outfit format which incorporates Topshop, Topman, Miss Selfridge). These retailers are sometimes prepared to close stores in smaller/medium sized centres in favour of representation on a retail park.

3.2.5 We also note the increasing preference of fast food operators to incorporate 'drive thru' restaurants, which has resulted in the closure of 'in centre' McDonald's restaurants in some centres. Furthermore, in November 2016, Marks & Spencer announced its intention to close up to 30 stores and relocate or downsize a number of others. The changes will result in clothing being sold in a lesser number of Marks & Spencer stores.

3.2.6 Such changes can result in particularly significant impacts at medium/smaller sized town centres, which tend to be the subject of higher vacancy rates, and which have also often suffered related reductions in rental levels and footfall in recent years. As a consequence, a greater proportion of comparison goods expenditure is being claimed by a smaller number of centres of sub-regional or regional importance.

3.2.7 However, such changes have also brought forward opportunities for different types of retailer. Some available units in smaller centres, including former BHS units, have been re-occupied by household discounters such as B&M Bargains, Poundland, Poundstretcher and Wilko. Whilst such lettings are valuable in bringing back premises into active use, many smaller centres are heavily reliant on such retailers, which generally operate at the lower end of the market.

3.2.8 In addition to national multiple retailers, independent traders face pressure from both the internet and national multiple retailers. Such trader's success lie in them being able to offer a product/service not available elsewhere, or a service/shopping experience not offered by national multiple retailers.

3.2.9 It is evident that some centres are seeking to 'reinvent' themselves through an increased focus on quality independent and food and drink operators. Towns are also increasingly valuing their market as a means to differentiate themselves from retail parks and superstores, and many markets are looking to contemporary and speciality retailers to create interest and draw customers in. The greatest opportunities for successful vintage, craft and food and drink markets have so far been in centres served by affluent catchments. Based on the demographics of the study area (discussed/summarised in Section 5) there is potential for such markets in both Ipswich Town Centre and the market towns in Suffolk Coastal district area.

3.2.10 The polarisation of retailing will result in larger more dominant centres continuing to attract key retailers, with medium/smaller sized town centres potentially struggling to attract investment. District/local centres should be less affected and are likely to retain their attraction for top-up/day-to-day shopping.

## 3.3 The End of the 'Big Four' Space Race and the Rise of the Discounter

3.3.1 Shoppers have turned away from food superstores in recent year and Mintel[1] suggests that this decline is such that it cannot be considered a 'blip'. Mintel attributes the problems which face superstores to two principal factors.

3.3.2 Firstly, many young people are choosing to rent within or close to town and city centres. As a consequence, many undertake sporadic food shopping and often eat out, use takeaways, or buy instant meals. Accordingly, when young people undertake food shopping, they often have no greater need than that which can be serviced by a convenience store.

3.3.3 The second factor is the growth of discount operators, which have become more mainstream in both their offer and market positioning. Mintel suggests that the improvements in discounters' offer, such as wider ranges, better fresh foods and more premium foods, means that they have become an attractive alternative to both large food superstores and to convenience stores.

3.3.4 As a consequence, the 'big four' foodstore operators (Asda, Morrison's, Sainsbury's and Tesco) have become circumspect in respect of new store openings and, indeed, have closed a number of existing foodstores. All four have suffered significant declines in their market share over the past four or five years. As Figure 3.1 below indicates, Tesco has suffered a 2.1 percentage point reduction in its share of the food retail market between 2011 and 2016, and Morrison's has suffered a 1.8 percentage point reduction in market share. Considered together, the market share of the big four foodstore operators has declined from 58.5% in 2011 to 52.7% in 2016 (a reduction of 5.8 percentage points). In contrast, other retailers – most notably Aldi and Lidl – have benefitted from increases in their market share. Aldi's market share increased from 1.9% to 5.3% (equating to an increase of 3.4 percentage points) between 2011 and 2016.

**Figure 3.1: Market Share of Key UK Food Retailers**

| Operator | 2011 | 2012 | 2013 | 2014 | 2015 | 2016 |
|---|---|---|---|---|---|---|
| Tesco | 23.7% | 23.9% | 23.0% | 22.5% | 22.0% | 21.6% |
| Sainsbury's | 12.8% | 13.1% | 12.9% | 12.8% | 12.2% | 11.9% |
| Asda | 12.5% | 13.3% | 13.0% | 13.0% | 12.0% | 11.5% |
| Morrison's | 9.5% | 9.3% | 8.9% | 8.2% | 7.9% | 7.7% |
| Aldi | 1.9% | 2.6% | 3.3% | 4.2% | 4.8% | 5.3% |
| Co-operative Food | 5.5% | 5.4% | 5.1% | 4.9% | 4.8% | 4.7% |
| Waitrose | 3.5% | 3.6% | 3.7% | 3.9% | 3.9% | 3.9% |
| Marks & Spencer | 3.6% | 3.7% | 3.7% | 3.8% | 3.9% | 3.9% |
| Lidl | 1.9% | 2.0% | 2.0% | 2.2% | 2.4% | 2.7% |
| Iceland | 1.8% | 1.9% | 1.9% | 1.9% | 1.8% | 1.8% |

*Source: UK Food & Grocery Retailer Update, Verdict, October 2016*

[1] 'UK Retail Rankings', Mintel, April 2016

3.3.5 The most notable expansion strategy pursued by any of the big four operators in recent years relates to Sainsbury's decision to enter the discount market through a partnership with Netto. Sainsbury's/Netto announced the trialling of 15 stores in November 2014 clustered around the M62 corridor between Liverpool and Hull in order to 'test the water'. The first two new build openings were announced in March 2015 in Lymm and Hull, which appeared to suggest confidence in the venture. However, following the trial, Sainsbury's/Netto decided to close all its UK stores at the end of 2016.

3.3.6 The current strategy of the big four operators is twofold: (1) the development of smaller store formats for top-up food shopping; and (2) the reconfiguration and refurbishment of existing foodstores.

3.3.7 The development of smaller store formats (Sainsbury's Local, Tesco Express, Marks & Spencer Simply Food, and Little Waitrose) is in response to changing food shopping habits and the move from weekly shops to more frequent smaller shops. These smaller store formats are important in driving footfall in smaller district/town centres and in some cases act as a vital 'anchor store'. It is evident that a number of the district centres in Ipswich, including Woodbridge Road/ Cauldwell Hall Road, Nacton Road and Duke Street, and town centres in the Suffolk Coastal district, including Felixstowe, are, in part, anchored by such stores.

3.3.8 In terms of the reconfiguration/refurbishment of existing foodstores, in some cases, product lines are being reduced and pricing is being made straightforward. Some operators are looking to introduce other uses to take existing floorspace and Sainsbury's acquisition of the Home Retail Group in September 2016 allows it to introduce Argos (which it now owns) into its stores. Small concessions of Habitat are also currently being tested within five branches of Sainsbury's.

3.3.9 Aldi and Lidl have both sought to take advantage of the structural changes in the food retail market and have announced ambitious store opening targets that will further increase pressure on the big four operators. Aldi has identified major expansion plans and intends to open 80 new UK stores in 2016[2], bringing its total number of stores to around 700. Over the longer term, it intends to trade from 1,000 UK stores by 2022[3]. Aldi's plans include three formats: standard stores of between 18,000 sq ft and 20,000 sq ft with a minimum of 70 parking spaces; the 'Small Aldi' format of between 10,000 sq ft and 14,000 sq ft with a minimum of 40 parking spaces; and, the 'City Aldi' format of between 7,000 sq ft to 10,000 sq ft with no parking spaces required. Aldi is understood to be considering all types of property, including development sites, mixed-use schemes, retail parks, high streets, shopping centres and roadside.

[2] Retail Week, 17 February 2016
[3] Property Week, 2 November 2016

3.3.10 Lidl plans to expand to trade from a portfolio of 1,200 UK stores in the coming years[4]. Lidl's future requirements reportedly[5] comprise units of between 20,000 sq ft and 30,000 sq ft, with sites of 1.5 acres required for standalone units and up to 4 acres for mixed-use schemes.

## 3.4 Growth in Internet & Multichannel Retailing

3.4.1 Many consumers who previously shopped in town centres and at retail parks are now increasingly using the internet to make purchases. Experian[6] identifies that 'special forms of trading' (which includes internet, mail order and market sales) now comprises an estimated 15.7% of total UK retail sales at 2017, which compares to a market share of just 5.6% at 2006. Experian estimates that the value of non-store sales in the UK at 2017 is £60.3 billion. It estimates that special forms of trading will increase further to 18.2% of retail expenditure at 2021. Thereafter, it is anticipated that additional growth will be relatively limited, with special forms of trading claiming 20.9% of UK retail expenditure at 2035 (the last reporting year for which Experian provides a figure).

3.4.2 The growth in internet as a sales medium has been enabled by the increase in access to the internet by UK households, which the Office for National Statistics[7] reports increased from 57% of households at 2006 to 89% in 2016. The proportion of households with access to the internet is expected to increase further over the coming years and the popularity of shopping online is also assisted by mobile phones and tablets with faster 4G network technology. The Office for National Statistics indicates that the proportion of adults accessing the internet using a mobile phone increased by nearly double – from 36% to 66% – between 2011 and 2015.

3.4.3 It is evident that improvements in technology and an increased confidence in the security of online payments have supported substantial increases in internet sales in recent years. In addition, the option of using the internet to 'click and collect' in-store at a dedicated counter, or at "pods" or concession in supermarkets (eg Argos, Habitat, and Timpson) is also increasing in popularity, with the service accounting for over 50% of John Lewis internet orders[8]. Some retailers are also seeing benefits arising from the use of shops as 'showrooms' where shoppers can view and try goods before making purchases later in their home (multichannel retailing). More progressive retailers are also providing in-store Wi-Fi (which can be used to inform shoppers of promotions via their mobile phones) and technology points (which can allow shoppers to browse a wider product range than that carried in store). Accordingly, whilst new technology and the rise of internet shopping undoubtedly provides challenges the importance of 'click and collect' highlights that physical stores within town centres will still have a significant role in the multichannel shopping environment.

[4] 'UK Food & Grocery Retailer Update', Verdict, October 2016
[5] Property Week, 2 November 2016
[6] 'Experian Retail Planner Briefing Note 14', November 2016
[7] 'Statistical Bulletin: Internet Access Households and Individuals', Office for National Statistics, August 2016
[8] 'Click and Collect', Mintel, September 2014

3.4.4 In addition, it is important to note that many purchases made online are actually sourced from the shelves of 'bricks and mortar' stores and thereby have the potential to support retail floorspace. This is acknowledged by Experian which now provides adjusted market share figures for special forms of trading in order to reflect purchases which are effected through stores. The adjusted allowance for special forms of trading equates to 3.0% for convenience goods at 2016, increasing to 4.4% at 2021, to 5.1% at 2026, to 5.8% at 2031, and to 6.4% at 2035. For comparison goods, the adjusted allowance is 12.4% at 2016, increasing to 15.0% at both 2021 and 2026, and then reducing slightly to 14.6% at 2031 and to 14.3% at 2035. The adjustment is greater for convenience goods, reflecting the fact that most online food purchases are taken from the shelves of actual stores.

## 3.5 Leisure and the Appetite for More Food and Drink

3.5.1 In recent years, town centres have also increasingly relied upon an expanding food and drink sector to bring some vacant units back into active use. Eating out has become increasingly popular and both national multiples and independents have benefitted from the additional expenditure which has resulted. Colliers[9] refers to Barclaycard data which identifies that spending in restaurants in the first quarter of 2015 was up 17% year-on-year.

3.5.2 Local Data Company[10] reports that the number of food and drink outlets in town centres have gone up by 6,000 between 2011-2016 whilst the number of town centre bars, pubs and night clubs fell by about 2,000. The largest food and drink growth areas included lounge bars (116%), cake makers (51%), juice bars (46%) and coffee shops (31%).

3.5.3 Food and drink operators now require units which are in amongst the retail heart of a centre, rather than taking space within a food court. As a consequence, modern shopping mall developments tend to mix food operators within the wider offer, and upwards of a quarter of units can be occupied by cafes, coffee shops, and restaurants. Food and drink operators (particularly national multiples) can be particularly attractive to landlords as long leases can often be agreed to due to the cost of fit-outs.

3.5.4 Mintel[11] also reports that although the three biggest operators, Odeon, Vue and Cineworld, still dominate the cinema market and account for 60% of the total UK cinema screens, there has been a steep increase in the number of independent screens, which now make up 23% compared to only 17% in 2015. Empire Cinemas, who have recently opened a cinema in The Buttermarket Shopping Centre, currently account for 4% of the total UK cinema screens. Niche cinema operators, such as Everyman, Curzon and The Light, are considered to have the potential to be particularly complementary to shopping environments. Such cinemas have more modest land take requirements than large multiplexes, and therefore may have a greater chance of being incorporated in a mixed-use development. Mintel reports that the growth of

[9] 'Midsummer Retail Report 2015' Collier International, July 2015
[10] LDC ' Retail & Leisure Report: 2016: In the Balance'
[11] Mintel, Cinemas, UK, November 2016

'event cinema' and diverse food and drink offerings provided by independents means cinema is becoming a destination for consumers who are not typical cinema fans.

3.5.5 The health and fitness sector has been buoyed by the popularity of budget gyms. Operators such as Pure Gym, The Gym Group and easyGym have an operational model which is based on low costs and high volume. Such gyms tend to have plenty of equipment in order to encourage uses, but are characterised by basic fit-outs and limited staff. Many budget gym operators – including Pure Gym and The Gym Group – are actively seeking to bring forward additional facilities, with a wide range of properties (including old theatres, larger shop units and office space) having the potential to meet their needs. The Leisure Database Company[12] suggests that there were around 300 budget gyms across the country in summer 2016, but that this figure has the potential to increase to around 1,000 in the next 3-4 years. Pure Gym is now the private health and fitness club market leaders in terms of both venue numbers (160 clubs) and memberships, heaving doubled the size of its estate over the two years to June 2016[13]. No other operator has more than 100 clubs, although chains including The Gym Group (78 clubs), Anytime Fitness (88 clubs) and Xercise4Less (56 clubs) are expected to expand the number of their clubs to over 100 by the end of 2017.

3.5.6 There are a number of emerging leisure concepts which are also helping to anchor retail environments, including bowling alleys, trampolining and crazy golf. These concepts can assist centres in providing a point of difference with the competition, ensure that visitors' dwell times are increased, and assist a town's evening economy. Such concepts do however require reasonably large footprint units/space which primarily due to physical constraints, town centres are not always able to provide/offer. We however note that there is a trampolining centre at Cardinal Park and the Buttermarket Shopping Centre contains a bowling alley.

## 3.6 The Hotel Sector 'To Stay or not to Stay'

3.6.1 The hotel sector is diverse and as such trends in one sector of the market can be markedly different to that of another. Generally since the 2008 recession the hotel market has picked itself up and has seen steady growth overall. Mintel[14] suggests that the total number of stays in 2016 was around 60 million and the number of nights at about 168 million. The expectation in recent years, since the 2008 crash, has been that the hotel market would continue to steadily grow, however, issues around Brexit, foreign exchange rates and the slowdown in economic recovery generally has raised a degree of uncertainty, particularly outside the London Market.

[12] Sports Insight, 11 June 2016
[13] Mintel, UK, Health & Fitness, July 2016
[14] Mintel, Hotels UK, November 2016

3.6.2 Hotel growth has continued apace in the last two years with high levels of openings in 2015 and 2016. PwC[15] forecast continued growth in room supply in 2017 with a 5% increase in room numbers in London and a 2.4% increase in the regions. A continued increase in the supply of rooms and a potential slowdown in the demand are likely to have an effect on both occupation rates and RevPAR (revenue available per room). In looking at the regions PwC[15] are 'cautiously' forecasting continued growth in both occupancy rates and RevPAR, but at a slower rate than seen in recent years. This is in contrast to the London market which is expected to see a marginal decline over 2016/2017.

3.6.3 In continuing to look at growth, Budget Hotels in particular have continued to grow rapidly in recent years, with the sector contributing approximately half of all new rooms. Premier Inn in particular, opened more than 30 hotels in the UK in 2016 (bringing total number to 738), in addition they have opened 3 new 'hub' branded hotels, in London (Westminster and Spitalfields) and Edinburgh. The location for these 2016 offerings has predominantly been in town or city centres but has also included peripheral but accessible urban locations. The next largest budget operator by hotel number is Travelodge who, after opening 19 new hotels in 2016 are keeping pace with Premier Inn in what is a highly competitive market in the UK. There new openings in 2016 included a 'Chinese friendly' hotel at Bicester close to the designer outlet Bicester Village, this 53 room hotel opened in May and was delivered through a partnership agreement with the local authority. Linked to budget hotels is the rise of 'super-budget' hotels, there has been a steady increase in these 'no-frills' establishments. With easyHotel leading the way and reporting the aspiration to open in excess of 4,500 rooms outside the capital through both owned and franchised properties.

3.6.4 Boutique hotels is another aspect of the market where there continues to be growth. Mainstream operators are branching out to provide more boutique/lifestyle brands to their customers, these include Marriots Moxy brand, Best Westerns Vib and Glo and Hiltons Tru[14]. These are often aimed at the younger client groups and focussed in popular locations for short breaks or staycations. Many trade at the luxury end of the market offering exclusive sites and locations and coupled with high levels of services and facilities.

3.6.5 Another factor influencing the hotel market is the continued rise of Airbnb as a more mainstream, accessible and often cheaper alternative to traditional hotel accommodation. This is a factor that has continued to gain traction and popularity, particularly in the congested London market, since being founded in 2008. Airbnb is also testing the waters in the business sector, now offering opportunities to combine stays with meetings/business accommodation. The foray into this market is seeking to diversify Airbnb's offer and will further bring it into competition with hotels. Further governance and control of this phenomenon may have the effect of applying the brakes, however, Airbnb provides a form of accommodation that has and will continue to appeal to those who want a home from home experience at a reasonable price. However, Airbnb does not offer the services and 'experience' that a hotel can, as such it will not suit all.

[15] PwC, UK Hotels Forecast 2017, September 2016

3.6.6 Tourism along with food and drink have been the fastest growing sectors in the UK economy since 2010. The Tourism Alliance has been publishing tourism statistics since 2012 which provide a useful barometer to the market and contribution of tourism to the wider economy. Their 2016 statistics identify that the total value of tourism to the East of England area in 2014 was some £6,499m and resulted in 120,343 direct employment opportunities[16]. Both domestic and inbound visitor numbers hit record highs in 2015[17], VisitEngland[18] provisional statistics for 2016 indicated a 5% fall in trips and 7% fall in nights stayed for the year to May compared to 2015. Looking at the East of England Region for that period the statistics identified a very marginal decrease (less than 1%) in the number of trips taken but a 1% increase in the number of nights stayed. This indicates the relative strength and resilience of East of England as a region generally when compared to other regions.

3.6.7 Looking at local tourism statistics Destination Research[19] have provided figures for 2015 for both Ipswich and Suffolk Coastal these identify 3.4 million and 5.6 million trips respectively with the bulk of these, 3.0 million and 5.3 million being day trips. The total value of tourism to the local economy are estimated to be £242m in Ipswich and £298m in Suffolk Coastal. Overnight visitors account for £73m and £74m respectively. Tourism is estimated to directly support 4,682 jobs in Ipswich and 5,635 jobs in Suffolk Coastal.

## 3.7 Brexit

3.7.1 The referendum in June 2016 on the UK's membership of the European Union resulted in a majority vote to leave the EU. The terms of withdrawal are to be negotiated with the Commission now that 'Article 50' has been formally triggered. A number of commentators have forecast that uncertainty during this time will negatively impact upon consumer confidence and expenditure, and that investor decisions may be put on hold. This is compounded by the uncertainty resulting from the snap general election that took place in 2017.

3.7.2 Whilst it would appear that the short term impact of 'Brexit' on the retail and leisure sector have perhaps been more modest than some analysts suggested, Verdict published an Economic & Retail Update in September 2016[20] in order to highlight potential future issues. Its Update provides the following forecasts.

- Retail growth across Britain in 2017 is expected to be flat and growth in the clothing and footwear sector as a whole is likely to be disappointing. However, the weaker pound means that international travellers may spend more, with international brands and premium goods being particularly attractive.

[16] Tourism Alliance UK Tourism Statistics 2016
[17] BDO, Hotel Britain 2016
[18] Visit England, Great Britain Tourism Survey May 2016, published September 2016
[19] Destination Research, Economic Impact of Tourism - Ipswich 2015 and Suffolk Coastal 2015
[20] 'Economic & Retail Update: H2 2016', Verdict, September 2016

- However, a weaker pound will also lead to higher import and manufacturing costs, which retailers will pass onto consumers. Verdict anticipates that the food and clothing and footwear sectors will see the greatest inflationary rises.
- Brexit may have a negative impact on the housing market and a consequential adverse impact on those retailers/leisure operators who rely on householders investing in their property. Accordingly, there may be less spending on goods such as furniture, floor coverings, DIY and gardening goods and so on.
- In volume terms, Verdict expects little change to the food retail sector, but notes that inflationary pressures might mean than shoppers spend more on their groceries and therefore have less to spend on other goods.

- Looking at the hotel market, Brexit has resulted in a weaker pound which comparatively makes the UK a more affordable location to visit for overseas visitors. This with the potential increase in staycations, may help in countering the likely reduced business demand due to uncertainty and low consumer confidence. The weak pound may also make the UK hotel market a more appealing prospect for overseas investors.

3.7.3 It is therefore evident that Brexit has the potential to impact on future expenditure growth (and also on population growth) in the two Council areas. As such, there will be a need to monitor the impacts arising from the UK's exit from the EU and for any future update to this Study to take appropriate consideration of such changes.

## 3.8 Potential Impact of Trends on Ipswich & Suffolk Coastal Town Centres

3.8.1 The town centres in the two council areas face a number of challenges, particularly from increasing competition from the internet, multichannel retailing, polarisation of retailing, and out-of-centre retail/leisure developments. These challenges will impact on the future strategy for the town centres.

3.8.2 It is important for town centres in the two council areas to be able to respond to continued changes in the retail and leisure sector and to provide (or continue to provide) an offer/destination which distinguishes them from competing centres and out-of-centre retail and leisure destinations.

3.8.3 The polarisation of retailing will result in larger more dominant centres (subject to continued investment) continuing to attract key retailers in comparison with medium/smaller sized town centres. As a result of the polarisation of retailing Felixstowe, and Woodbridge town centres are likely to be constrained particularly in their ability to attract new national multiple retailers. Ipswich Town Centre, given its sub-regional role, should be less effected by the polarisation of retailing. Indeed, as examined later in the study (Section 6) a number of retailers, including Next, are seeking to open premises in Ipswich Town Centre. In terms of district/local centres in the two Council areas, these should be even less affected and are likely to retain their attraction for top-up/day-to-day shopping.

3.8.4 The end of the 'Big Four' grocers floorspace race, whilst may relieve pressure from further out-of-centre large foodstore development, has the potential to negatively impact on the delivery of retail led mixed use redevelopment of town centres. The Westgate site in Ipswich Town Centre being an example where a retail led mixed use redevelopment did not materialise in part due to the lack of an anchor retail tenant. However, the current strategy of the big four operators to develop smaller store formats does have an important role to play in meeting town centre residents top-up/basket shopping needs and are likely to form important ground floor uses of town centre redevelopments. The smaller format stores are also important in driving footfall in the smaller district/town centre in the two council areas. In terms of the big four operator's strategy to reconfigure their existing foodstores and introduce small concessions the Council's will need to carefully appraise the potential associated retail impacts arising from additional concessions and assess if there is likely to be any potential closures of existing stores in town centres as a result.

3.8.5 Whilst the growth in internet and multichannel retailing provides challenges for the town centres in the two council areas (and has had an impact on 'bricks and mortar' shopping), physical stores in the town centres have a significant role in the multi-channel shopping environment. In order to assist in minimising impact further it is important for town centres in the Study Area to be responsive to changes in technology and multi-channel retailing.

3.8.6 The food and drink sector has become an important offering for the town centres in the two Council areas and assists in increasing the 'dwell time' of visitors. However, food and drink operators increasing requirements for units within prime shopping streets could potentially impact on the range and availability of units for A1 retailing where such uses should be a priority in the primary shopping streets.

3.8.7 Additional leisure activities, including cinema and health and fitness facilities, also contribute positively to the overall offer of a town centre but again the location of these uses in town centres needs to be carefully considered so as not to materially harm the A1 retail offer in the primary shopping streets. We consider the larger town centres in the two council areas, given their shopping, employment and residential roles, should be well placed to meet budget gym operators ambitious growth plans.

3.8.8 Tourism generally, and hotels in particular, make an important contribution to the town centres of Ipswich and Suffolk Coastal. Notwithstanding the uncertainties around Brexit, the respective Local Planning Authority areas, need to positively harness the economic benefits of the hotel sector, ensuring the supply of hotel bed spaces in the areas supports the continued drive for growth and supports the vitality of designated centres.

3.8.9 The continued growth of new out-of-centre/retail park formats represents a threat to the future vitality and viability of the town centres in the two council areas. In order to protect the vitality and viability of centres it is important therefore that both Councils not only just control the expansion/change of use of out-of-centre development but also plan positively for town centre/edge-of-centre development opportunities. Notwithstanding this, both Councils will need to be mindful of guidance in the NPPG (paragraph 6) which identifies that, where it is not possible to accommodate all forecasts needs in a town centre, LPA's should plan positively to identify the most appropriate alternative strategy for meeting the need, having regard to the sequential approach and retail impact tests.

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

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

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

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

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

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

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

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

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

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

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

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

# 4.0 Original Market Research

## 4.1 Introduction

4.1.1 This study is informed by three key areas of original market research. The three key areas being:

- A Telephone Household Survey;
- A Hotel Managers Survey; and
- Key Stakeholder Engagement.

4.1.2 Each of the 3 key areas of market research are summarised in turn below.

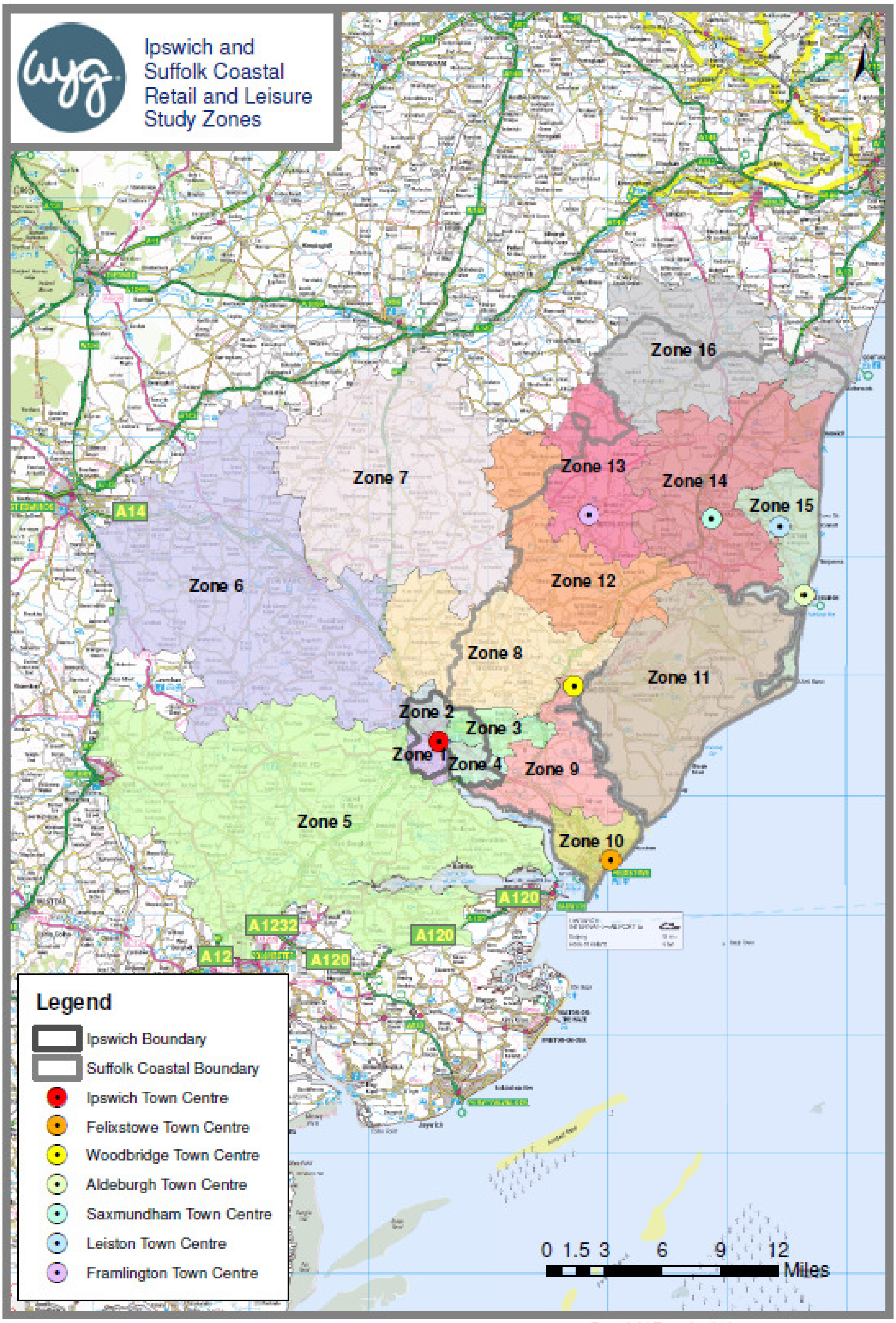
## 4.2 Telephone Household Survey

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

4.2.2 The undertaking of a household telephone survey enables in-depth analysis at a local level and allows the evaluation of the trade draw of particular town centres. The use of specifically commissioned and tailored survey research is fundamental to identifying the likely capacity for future retail and leisure needs across the Study Area. Notwithstanding this, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved, and the results should therefore be taken to be a broad indication of consumer preferences.

4.2.3 The household survey was undertaken in January/February 2017. The survey involved 1,600 households across a defined Study Area which comprises 16 separate zones. The Study Area, as shown in Figure 4.1 below, stretches some distance beyond the two council administrative boundaries to incorporate outlying areas. These outlying areas also, to some extent, look to facilities within Ipswich to meet retail and leisure needs. The Study Area therefore incorporates areas such as Stowmarket to the north west of Ipswich, Hadleigh to the east and Manningtree to the south.

**Figure 4.1: Study Area**



4.2.4 In order to assist with the comparison of shopping/leisure patterns to the previous retail and leisure studies undertaken on behalf of the Councils, where possible, the study area adopts the same zones. With the exception of minor postcode sector changes in Zones 7 and 8 the study area is broadly comparable to the combined study area of the Ipswich Retail & Commercial Leisure Study, 2010 and Suffolk Coastal Retail Capacity Refresh Study, 2015.

4.2.5 Figure 4.2 below details the postcode sectors which make up the survey zones. Zone 1-4 comprises the urban area of Ipswich, including the eastern fringe, and Ipswich Borough. The zones are identical to Zone 1-4 of the 2010 Ipswich Retail & Leisure Study (referred to as the **Inner Catchment Area**). Zone 5-8 also reflect zones 8-10 of the Ipswich Retail and Leisure Study whilst Zones 9-16 are identical to Zones 1,2 and 5-10 of the 2015 Suffolk Coastal Retail Study.

**Figure 4.2 Postcodes by Survey Area**

| Survey Zone | Postcode Sector | 2010 Ipswich Study Zone | 2015 Suffolk Coastal Study Zone |
|---|---|---|---|
| Zone 1 - Ipswich South West | IP1 1-2, IP2 0, IP2 8-9 | Zone 1 | - |
| Zone 2 - Ipswich North West | IP1 3-6 | Zone 2 | - |
| Zone 3 - Ipswich North East | IP4 2-5, IP5 1-3 | Zone 3 | Part Zone 3 |
| Zone 4 - Ipswich South East (incl. Ipswich Eastern Fringe) | IP3 0, IP3 8-9, IP4 1 | Zone 4 | - |
| Zone 5 - Hadleigh/ East Bergholt / Manningtree | CO4 5, CO6 4-5, CO6 5, CO7 6, CO10 0, CO10 5, CO11 1-2, IP7 5-6, IP7 6, IP8 3, IP9 1-2 | Zone 10 | - |
| Zone 6 - Stowmarket/ Needham Market | IP6 8, IP7 7, IP8 4, IP14 1-3, IP30 0, IP30 9, IP31 3 | Zone 9 | - |
| Zone 7 – Debenham (Rural South of Diss) | IP14 4-6, IP23 7- 8 | Part Zone 8 | - |
| Zone 8 - Woodbridge West | IP6 0, IP6 9, IP12 1, IP13 6 | Part Zone 8 | Part Zone 4 |
| Zone 9 - Woodbridge South | IP10 0, IP12 4 | - | Zone 2 |
| Zone 10 - Felixstowe | IP11 0, IP11 2-4, IP11 7, IP11 9 | - | Zone 1 |
| Zone 11 - Woodbridge East (rural) | IP12 2-3 | - | Zone 5 |
| Zone 12 - Wickham Market | IP13 0, IP13 7 | - | Zone 8 |
| Zone 13 - Framlingham | IP13 8-9 | - | Zone 9 |
| Zone 14 - Saxmundham | IP17 1-3 | - | Zone 6 |
| Zone 15 – Aldeburgh/ Leiston | IP15 5, IP16 4 | - | Zone 7 |
| Zone 16 - Halesworth | IP18 6, IP19 0, IP19 8-9 | - | Zone 10 |

4.2.6 Zones 1, 2, 4 and the western part of Zone 3 broadly cover Ipswich Borough Council's administrative area whilst Zones 9, 10, 11,14 and 15 and parts of Zone 3, 8, 12, 13 and 16 cover the Suffolk Coastal district area.

4.2.7 The questions and full tabulation of results from the household survey are provided at **Appendix A**.

4.2.8 The results of the household survey, *inter alia*, are utilised to calculate the expenditure claimed by each existing retail facility within the Study Area, a process which is considered in Section 8 of this study.

## 4.3 Hotel Managers Survey

4.3.1 In order to inform both the quantitative and qualitative hotel needs assessment we commissioned a hotel manager's survey in January 2017. The detailed questionnaire, comprising 25 questions, was emailed and posted to the hotel managers of 62 existing hotels in the Ipswich and Suffolk Coastal area. The list of hotels was compiled in conjunction with Officers in the two Councils.

4.3.2 The hotel manager's survey is intended to establish details of existing hotels in the two council areas including information on:

- room numbers;
- car parking spaces;
- average room rate;
- facilities (including conference and wedding facilities);
- occupancy rates (weekend and mid-week); and
- future plans (refurbishment or extension).

4.3.3 The questionnaire is provided at **Appendix B** with the feedback/results detailed in Section 10 of this Study.

## 4.4 Key Stakeholder Workshop/Engagement

4.4.1 In order to inform the qualitative analysis in this study we have engaged with key stakeholders in the two Council areas. The objective of the key stakeholder engagement is to assist establishing:

- views on any strengths, weaknesses, opportunities, threats in centres/retail and leisure provision; and
- suggested improvements to the defined centres.

4.4.2 The town centres on which information was being sought on were: (1) Ipswich; (2) Woodbridge; (3) Felixstowe; (4) Aldeburgh; (5) Saxmundham; (6) Leiston; and (7) Framlingham.

4.4.3 In consultation with the two Councils some 91 key stakeholders, including key business owners, groups, relevant community groups and neighbouring authorities, were invited to a stakeholder workshop on the morning of the 3rd February. Overall some 24 attended the workshop event.

4.4.4 The workshop was arranged so views from key stakeholders on the following particular areas could be sought:

- Any strengths in centres retail, leisure and hospitality provision;

- Any weaknesses in centres retail, leisure and hospitality provision;
- Potential threats to centres;
- Potential opportunities for centres; and
- Suggested improvements to the defined centres in Ipswich and Suffolk Coastal towns

4.4.5 A summary of the 'key feedback' from the workshop for each town centre is provided at **Appendix C**.

4.4.6 A feedback form was emailed to those stakeholders that couldn't attend the workshop to enable them an opportunity to provide any comments. Feedback forms were also sent to stakeholders who attended the workshop event to allow them the opportunity to make any further individual comments.

4.4.7 At Ipswich Borough Council's request separate telephone discussions were held with: the former MP for Ipswich, Ben Gummer; Ipswich and District Hoteliers Association; Ipswich DMO; Ipswich Town & Waterfront; and East of England Co-op (Co-op) . A summary of the discussions are provided at **Appendix D**. The feedback from these telephone discussions has informed our SWOT assessment of Ipswich Town Centre contained in Section 6 of this Study.

4.4.8 In addition to the above, engagement has also taken place with a number of retail, leisure and hotel operators (or agents acting on their behalf) to understand current demand/interest in town centres and potential opportunities in Ipswich and other market towns.

4.4.9 In accordance with the duty to cooperate, WYG has also worked with the two Councils to contact neighbouring local planning authorities in order to identify existing retail and leisure commitments and proposals within competing centres which could have the effect of enhancing their retail, leisure, hotel offer. The Council's we have contacted are:

- Colchester Borough Council;
- Babergh and Mid Suffolk District Councils;
- St Edmundsbury Borough Council;
- Waveney District Council;
- Norwich City Council; and
- Tendring District Council.

4.4.10 Details on relevant existing commitments in the neighbouring authority areas are summarised in Section 5 of the Study.

# 5.0 Retail Patterns and Market Share Analysis

## 5.1 Introduction

5.1.1 Drawing on the findings of the household telephone survey this section analyses the convenience and comparison goods retail market share patterns within the Study Area. In order to provide some context for these market share patterns this section firstly:

- provides an overview of the socio demographic context of the two Council areas;
- sets out the sub-regional centre hierarchy;
- summarises the existing retail and leisure provision in the Ipswich and Suffolk Coastal areas; and
- summarises existing retail and leisure facilities within the main competing centres.

5.1.2 An analysis of leisure market share patterns is provided as part of the commercial leisure need assessment set out in Section 9 of the study.

## 5.2 Socio Demographic Context of the Council Areas

5.2.1 A population profiling exercise has been undertaken utilising the Experian Mosaic database to establish the socio demographic profile of the two Council areas and the Study Area. A national UK average is also provided so as to enable a comparative assessment to be undertaken. The breakdown and definition of each Experian Mosaic group is provided at **Appendix E**.

**Figure 5.1 – Experian Mosaic Profiling (%)**

| Mosaic Group | Ipswich Borough | Suffolk Coastal District | Study Area | UK Average |
|---|---|---|---|---|
| Population (Adults 18+) | 106,392 | 102,241 | 365,144 | - |
| | | | | |
| A: City Prosperity | 0.2 | - | 0.1 | 4.1 |
| B: Prestige Positions | 3.0 | 7.8 | 4.2 | 7.2 |
| C: Country Living | - | 23.1 | 19.9 | 6.8 |
| D: Rural Reality | - | 20.7 | 17.2 | 6.8 |
| E: Senior Security | 13.3 | 11.6 | 9.8 | 7.9 |
| F: Suburban Stability | 7.0 | 5.4 | 5.6 | 6.0 |
| G: Domestic Success | 3.3 | 9.4 | 6.5 | 8.4 |
| H: Aspiring Homemakers | 14.5 | 6.3 | 10.3 | 9.0 |
| I: Family Basics | 11.9 | 1.6 | 4.6 | 7.3 |
| J: Transient Renters | 16.6 | 2.9 | 6.6 | 5.7 |
| K: Municipal Challenge | 5.8 | 0.6 | 2.0 | 5.8 |
| L: Vintage Value | 8.3 | 4.9 | 5.1 | 6.2 |
| M: Modest Traditions | 5.4 | 1.9 | 2.8 | 4.7 |
| N: Urban Cohesion | 1.0 | 0.3 | 0.5 | 5.2 |
| O: Rental Hubs | 8.8 | 2.1 | 4.1 | 7.4 |
| U: Unclassified | 0.9 | 1.2 | 0.9 | 1.4 |
| **Total** | **100** | **100** | **100** | **100** |

*Source: Experian Mosaic Reports, February 2017*
*Notes: Population derived from Mosaic report – 2015 estimate Adults 18+*

5.2.2 The Experian Mosaic results highlight that when compared to the UK average Ipswich Borough contains:

- a higher proportion of residents within the 'Family Basics' (11.9% compared to 7.3%) category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and a lower proportion within the 'Domestic Success' (3.3% compared to 8.4%) category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs);
- a higher proportion of residents within the 'Aspiring Homemakers' (14.5% compared to 9.0%) category (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);
- a lower proportion of residents in the 'Prestige Positions' (3.0% compared to 7.2%) category (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving);
- a significantly higher proportion of residents in the 'Transient Renters' (primarily younger population in low cost/social accommodation) category (16.6% compared to UK average of 5.7%);
- an identical proportion of residents (5.8%) within the 'Municipal Challenge' category (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats);
- a slightly higher proportion of residents within the 'Suburban Stability' (7.0% compared to 6.0%) (couples with mid-range incomes/pre-retirement couples with respectable incomes/single mature in intermediate occupations/active families with teens/adult children);
- a higher proportion of residents within the 'Vintage Value' (8.3% compared to 6.2%) (ageing/elderly in social/low value homes/retirement homes) and 'Senior Security' (13.3% compared to 7.9%) (elderly in affordable/comfortable/standard homes) categories; and
- due to the urban nature of the Borough no residents in the 'Country Living' and 'Rural Reality' categories.

5.2.3 Whilst the Mosaic results generally highlight that Ipswich Borough has a higher proportion of residents within the lower grade and senior citizen/elderly Experian Mosaic categories it also highlights that the Borough contains a higher proportion of aspiring young families/singles.

5.2.4 In terms of Suffolk Coastal District, the Experian Mosaic results highlight, primarily due to the fact that a large proportion of the district is rural in nature, that a significantly higher proportion of residents in the district fall within those categories relating the country/rural living. Of particular note the Experian Mosaic results indicate that, when compared to the UK average, the district is characterised by:

- Broadly the same proportion of residents in the 'Prestige Position' category (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving);
- A significantly higher proportion of residents in the 'Country Living' (23.1% compared to 6.8%) category (wealthy landowners/families in comfortable village homes/retirees/older household appreciating rural calm);
- A significantly higher proportion of residents in the 'Rural Reality' category (20.7% compared to 6.8%) (mid-income rural families/pensioners in inexpensive housing/mature households);
- A higher proportion of residents in the 'Senior Security' category (11.6% compared to 7.9%) (elderly in affordable/comfortable/standard homes) and lower proportion of residents in the 'Vintage Value' category (4.9% compared to 6.2%) (ageing/elderly in social/low value homes/retirement homes));
- A lower proportion of residents in the 'Aspiring Homemakers' category (6.3% compared to 9.0%) (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);
- A lower proportion of residents in the 'Municipal Challenge' (0.6% compared to 5.8%) (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats) and 'Transient Renters' (2.9% compared to 5.7%) (primarily younger population in low cost/social accommodation) categories; and
- a significantly lower proportion of residents within the 'Family Basics' (1.6% compared to 7.3%) category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and a slightly higher proportion within the 'Domestic Success' (9.4% compared to 8.4%) category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs).

5.2.5 The Mosaic results generally highlight that the Suffolk Coastal district has a higher proportion of residents within the higher grade categories.

5.2.6 Turning to the Study Area, the Experian Mosaic results highlight that when compared to the UK average the study area contains:

- a lower proportion of residents in the 'Prestige Positions' (4.2% compared to 7.2%) category (families with substantial income/retired in sizeable homes/upmarket suburban homes/high achieving);
- A higher proportion of residents in the 'Aspiring Homemakers' category (10.3% compared to 9.0%) (younger and settled families in affordable/modest homes/fashion conscious young singles/partners setting up home/young singles renting in family suburbs);

- a lower proportion of residents within the 'Family Basics' (4.6% compared to 7.3%) category (stable families renting from social landlords/families where expenditure can exceed income/ younger families with budget home/families living in areas of high deprivation) and a lower proportion within the 'Domestic Success' (6.5% compared to 8.4%) category (affluent families in upmarket housing, well qualified singles, families in modern detached homes/traditional mid-range suburbs);
- A significantly higher proportion of residents in the 'Country Living' (19.9% compared to 6.8%) (wealthy landowners/families in comfortable village homes/retirees/older household appreciating rural calm) and 'Rural Reality' category (17.2% compared to 6.8%) (mid-income rural families/pensioners in inexpensive housing/mature households);
- A higher proportion of residents in the 'Senior Security' category (9.8% compared to 7.9%) (elderly in affordable/comfortable/standard homes) and lower proportion of residents in the 'Vintage Value' category (5.1% compared to 6.2%) (ageing/elderly in social/low value homes/retirement homes);
- A lower proportion of residents in the 'Municipal Challenge' (2.0% compared to 5.8%) (long term renters/older social renters/hard-pressed singles/multi-cultural household of social/low cost flats)
- A higher proportion of 'Transient Renters' (6.6% compared to 5.7%) (primarily younger population in low cost/social accommodation) categories;
- Broadly the same proportion of residents within the 'Suburban Stability' (5.6% compared to 6.0%) (couples with mid-range incomes/pre-retirement couples with respectable incomes/single mature in intermediate occupations/active families with teens/adult children)

5.2.7 Overall, the Mosaic results highlight that the Study Area has a mixed socio demographic profile providing a significantly higher proportion of residents within those categories relating the country/rural living, a lower proportion of higher grade categories, and a varied proportion of the middle grade categories (lower in family basics/higher in aspiring homemakers/broadly same as UK average for suburban Stability).

5.2.8 The socio demographics of a catchment area of a town will, in part, have an impact on the quantum and type of retail and leisure demand in a town centre. The type of retail and leisure requirements/demands for the towns in the two council areas is discussed further in Section 6, 7 and 8 of the study.

## 5.3 Sub-Regional Centre Rankings

5.3.1 Figure 5.2 illustrates the position of the principal centres within the hierarchy of centres based on the Venuescore's UK Shopping Venue Rankings. The index ranks over 3,000 retail venues within the UK (including town centres, stand-alone malls, retail warehouse parks and factory outlet centres) based on the current retail provision. Towns and major shopping centres are rated using a scoring system which takes account of the presence in each location of multiple retailers – including anchor stores, fashion operators and non-fashion multiples. The rankings in the table represent the position of the centres at the time of the most recent Rankings as well as competing surrounding centres. A more detailed tabulation of retail rankings data is also provided which shows the historic performance of the centres in the preceding 2009 Rankings.

5.3.2 Whilst other rankings do exist (ie CACI), the VenueScore rankings have been adopted for consistency with the 2010 Ipswich Retail & Commercial Leisure Study.

**Figure 5.2: Sub-regional Centre Rankings**

| Centre | Classification | 2009 Rank | 2016 Rank | Change in Rank 2009-2016 |
|---|---|---|---|---|
| Norwich | Major City | 8 | 14 | -6 |
| Cambridge | Major Regional | 41 | 26 | +15 |
| **Ipswich** | **Regional** | **67** | **63** | **+4** |
| Chelmsford | Regional | 90 | 67 | +23 |
| Colchester | Regional | 76 | 73 | +4 |
| Bury St Edmunds | Regional | 216 | 126 | +90 |
| **Felixstowe** | **Major District** | **443** | **384** | **+59** |
| Stowmarket | District | 744 | 629 | +115 |
| **Woodbridge** | **Minor District** | **-** | **1,154** | **-** |
| **Saxmundham** | **Minor District** | **-** | **1,486** | **-** |
| **Adleburgh** | **Local** | **-** | **2,577** | **-** |

*Source: VenueScore 2009 and 2015-16 Rankings*

5.3.3 Figure 5.2 shows that Ipswich is identified as a Regional Centre and has seen a slight improvement in its ranking between 2009 and 2016. This is despite the loss of national multiple retailers Next, Gap and Laura Ashley from the town centre within this period. Both the centres of Norwich and Cambridge, classified as Major City and Major Regional Centre respectively, continue to be ranked higher than Ipswich in VenueScore Rankings with Cambridge improving its position since 2009 and Norwich seeing a slight fall in its rank. Colchester, Chelmsford and Bury St Edmunds have also both improved their rankings, particularly Bury St Edmunds, but all three remain below Ipswich. The primary reason why Bury St Edmunds has seen a significant improvement in its ranking is because of The Arc Shopping Centre development. In our opinion, due to physical constraints in Bury St Edmunds Town Centre, and in the absence of any significant redevelopment plans in the town centre, it is extremely unlikely that Bury St Edmunds would continue to see such significant improvement in its rankings and overtake Ipswich in the near future.

5.3.4 Figure 5.2 also shows that only four Suffolk Coastal centres feature in VenueScore rankings: Felixstowe, Woodbridge, Saxmundham, and Adleburgh. Felixstowe is classified as a Major District Centre, both Woodbridge and Saxmundham as Minor District Centres and Adleburgh as a Local Centre. Felixstowe has experienced a considerable improvement in its rankings between 2009 and 2016 with the centre sitting above Stowmarket, Woodbridge, Saxmundham and Adleburgh. As expected Felixstowe sits below the larger centres of Ipswich, Colchester and Bury St Edmunds. The centres of Adleburgh, Saxmundham and Woodbridge were not included in the 2009 rankings. These centres are currently ranked below Stowmarket and Felixstowe.

5.3.5 As noted earlier the Rankings are reflective of the presence of national multiple retailers in a particular centre and are therefore a more accurate barometer of the performance of larger centres. Accordingly, towards the lower end of the Rankings, such as Woodbridge and Adleburgh, the importance of a centre can be overlooked or amplified based on whether a handful of national multiples are present or not.

5.3.6 Centre rankings can, in part, have an impact on the quantum and type of retail and leisure demand in a town centre. The type of retail and leisure requirements/demands for the towns in the two council areas is discussed further in Section 6,7 and 8 of the study.

## 5.4 Existing Retail & Leisure Provision in Ipswich & Suffolk Coastal area

5.4.1 Provided below is a summary of existing retail and leisure provision in the two Council areas.

### Ipswich Borough

Centres

5.4.2 Ipswich Town Centre is the principal shopping and leisure location in the Borough. The town centre attracts shoppers and visitors from a wide catchment which extends beyond the Borough area. The centre provides a mix of retail and leisure facilities including some 66,750sq m gross of retail floorspace, 8,630sq m of retail service floorspace, 31,290sq m gross leisure service floorspace, and 14,010sq m gross financial and business services floorspace (source: Experian Goad Survey, November 2016)[21]. In addition to retail and commercial leisure facilities, the town centre also contains a range of other uses including office, commercial, cultural, tourism and residential uses. These uses attract people to the town centre for reasons other than purely shopping and/or leisure.

5.4.3 Ipswich Town Centre is complemented by a number of district and local centres and uses along the Waterfront.

[21] Nb – The Experian Goad boundary for Ipswich Town Centre is not the same as the Town Centre boundary defined in the Adopted Local Plan. The Local Plan town centre boundary includes a significantly larger area including the Waterfront

5.4.4 Overall there are 11 district centres and 34 local centres within the Ipswich Borough area. A plan showing the location of the district and local centres in the Borough is provided at **Appendix F**. The existing district centres in Ipswich are:

- Meredith Road;
- Norwich Road;
- Hawthorn Drive;
- Stoke Park Drive;
- Wherstead Road;
- Cauldwell Hall Road/Woodbridge Road.
- Felixstowe Road;
- Nacton Road;
- Ravenswood;
- Woodbridge Road East/ Heath Road;
- Duke Street; and

5.4.5 A new district centre at Sproughton Road/ Eastway is proposed as well as a new district centre at the Ipswich Garden Suburb.

5.4.6 The district centres provide important local day-to-day shopping facilities/services for their surrounding local residential areas. Figure 5.4 below summarises the total number of units in each centre and set out the key anchor stores.

**Figure 5.4: District Centres in Ipswich Borough**

| District Centre | | No. of Units | Key Anchor Stores/Facilities |
|---|---|---|---|
| No | Name | | |
| 3 | Meredith Road | 17 | Aldi |
| 7 | Norwich Road | 60 | Coe's of Ipswich, |
| 9 | Hawthorn Drive | 16 | Co-op, Hawthorn Drive Surgery |
| 11 | The Centre, Stoke Park Drive | 6 | Asda superstore |
| 13 | Wherstead Road | 19 | Co-op |
| 17 | Woodbridge Rd East/Heath Rd | 14 | Co-op |
| 18 | Woodbridge Rd/Cauldwell Hall Rd | 34 | Sainsbury's Local, Barclays Bank |
| 23 | Felixstowe Road | 46 | Aldi foodstore, Co-op, |
| 28 | Nacton Road | 38 | Tesco Express |
| 47 | Ravenswood | 15 | Lidl, Co-op, Ravenswood Medical Practice |
| 48 | Duke Street | 32 | Tesco Express, Travelodge |

*Source: WYG Surveys, January 2017*

5.4.7 Further details and vitality and viability health check assessments of Ipswich Town Centre and the 11 district centres are provided in Section 6 and **Appendix G** of the study.

<u>Ipswich Waterfront</u>

5.4.8 Ipswich Waterfront has undergone major redevelopment over the past 15 years with, in additional to marina facilities, a mix of uses including, education (University of Suffolk), residential, office, student accommodation, restaurants/bars, coffee shops/café's, hotel, leisure, and complimentary retail/service facilities. Our appraisal of the Waterfront identifies that businesses currently occupying premises include:

- Salthouse Harbour Hotel;
- Isaacs Public House;
- Nicholas Estates (Estate Agents);
- Pizza Express;
- The Grazing Sheep – Bar and Restaurant;
- The Grand Central – American Restaurant;
- Bistro on the Quay;
- Anytime Fitness;
- Colours Continental Cafe;
- Bushells Box – gifts and accessories;
- Pizza Al Taglio;
- Waterfront Bistro;
- Cult Bar;
- Aurora;
- Il Punto;
- Coffeelink;
- Offices – including HTK and Ashtons Legal;
- Associated British Ports (ABP); and
- Dance East – Dance House (and DanceEats).

5.4.9 The Waterfront provides a unique destination which currently compliments retail/service/leisure facilities in the town centre. There are still a number of parcels of land/vacant buildings along the Waterfront which are to be redeveloped. It is considered important that the redevelopment of these sites/buildings provides the right balance of uses along the Waterfront and that such uses ensure that it continues to compliment and work alongside the town centre rather than compete with it. It is noted that the New Anglia Local Enterprise Partnership and Homes and Communities Agency (HCA) have recently approved a £15m loan to restart the development of the prominent "Winerack" structure/building on the Waterfront.

5.4.10 Whilst the Waterfront is only a relatively short walk from the town centre the pedestrian linkages between the two are considered to be relatively weak with the Star Lane/College Street road gyratory presenting a physical barrier between the two. Improvements to the linkages and the future use of a number of sites in the area between the Waterfront and primary shopping streets in the town centre are considered to be key to maximise linked trips between the two.

Out-of-Centre Retail/Leisure Provision

5.4.11 In terms of out-of-centre retail and leisure provision there is a significant concentration of retail/leisure parks in the Ipswich urban area. Figure 5.5 below provides details of the main retail/leisure parks and sets out the current key occupiers.

**Figure 5.5: Main Out-of-Centre Retail/Leisure Parks in Ipswich Borough**

| | Distance from Ipswich Town Centre | No. of Units | Vacant Units | Key Occupiers |
|---|---|---|---|---|
| Anglia Retail Park | 4.8 miles | 11 | 5 | Mammas and Papas, Carpet Right, Costa, Carphone Warehouse, Pizza Hut |
| Futura Park | 4.8 miles | 8 | 0 | Waitrose/John Lewis at Home, Tapi, DFS, Furniture Village, Carphone Warehouse and Costa |
| Euro Retail Park | 5.4 miles | 11 | 1 | B&M, Sports Direct, Halfords, Dreams, Wren Kitchens, Harveys, ScS, B&Q, Pizza Hut, Burger King and Natwest |
| Orwell Retail Park | 2.4 miles | 3 | 0 | Wickes, Glasswells, Pets at Home |
| Ranelagh Road | 2.2 miles | 5 | 0 | Gala Bingo, Stellisons Euronics Electrical Store, Matalan, DW Fitness Clubs, Orwell Motorcycles |
| Suffolk Retail Park | 1.4 miles | 6 | 1 | Next, Argos, Halfords, The Range, Dunelm |
| Commercial Road Retail Park | 0.7 miles | 8 | 0 | Carpetright, Topps Tiles, Jollyes Petfood Superstore, Majestic, Tile Giant, Machine Mart, Avis and Halfords |
| Cardinal Park | 0.6 miles | 12 | 0 | Cineworld, Frankie & Benny's, Nando's, Ask Italian, Harvester, Chimichanga, Mcdonald's, Flux Trampoline Park, Wacky Warehouse, KFC, Golden Dragon |
| Commercial Rd/ Russell Rd | 0.6 miles | 2 | 0 | Staples, Fitness First |
| Sproughton Road | 3.4 miles | 2 | 0 | Namco Funscape Bowling, Morrisons |

*Source: WYG Surveys, January/February 2017*
*Notes: Planning permission granted (at appeal) for conversion of Namco Funscape Bowling to A1 non-food retailing. Discount retailer, Home Bargains, have been named as a potential end user.*
*Anglia Retail Park is undergoing significant redevelopment with Go Outdoors, the Range, Bounce, Billy Beez, B&M Homestores and Smyths have opened in the Summer 2017*

5.4.12 In addition to those retail/leisure parks listed in Figure 5.5 two further parks are located within the 'urban area' of Ipswich but outside the borough: Copdock/Interchange and Martlesham Heath Retail Park. Copdock/Interchange is located in Babergh District and Martlesham Heath Retail Park within Suffolk Coastal District. Further details on Copdock/Interchange, which is located on the south western fringe of Ipswich, are set out in Figure 5.6 below whilst details on Martlesham Retail Park, located on the eastern fringe of Ipswich, are provided later in this section as part of our description of retail/leisure provision within the Suffolk Coastal district area.

**Figure 5.6: Out-of-Centre Retail/Leisure Parks in South Western Fringe of Ipswich**

| | Distance from Ipswich Town Centre | No. of Units | Vacant Units | Key Occupiers |
|---|---|---|---|---|
| Copdock/ Interchange | 3.3 miles | 9 | 1 | Tesco Extra, Toys R Us, Mothercare, Multiyork, B&M Home Store, Curry's/PC World/Carphone Warehouse, Pizza Hut, Burger King, Costa Coffee |

*Source: WYG Surveys, January/February 2017*
*Vacant unit is vacant plot next to Burger King which is advertised for A3 use*

5.4.13 It is noted that the Babergh & Mid Suffolk District Council's Joint Town Centres & Retail Study (2015) identifies growth for the Copdock/Interchange area (2,432sq m net comparison goods by 2031) but advises that this growth should be met in Ipswich Town Centre first. We agree with this approach although it should be noted that because the study area did not include the Ipswich urban area, and instead makes a broad estimate of the amount of market share drawn from the Ipswich urban area, its findings for Copdock/Interchange are constrained. The Study Area for this study is far wider and includes the catchment area of Copdock/Interchange.

5.4.14 There is also a good provision of out-of-centre foodstores in the Ipswich Borough area including the following large foodstores:

- Asda, Whitehouse Industrial Estate - 9,974sq m gross floorspace
- Tesco Extra, Copdock/Interchange - 9,937sq m gross floorspace (within Babergh District)
- Sainsbury's, Hadleigh Road - 7,625sq m gross floorspace
- Morrison's, Sproughton Road - 7,605sq m gross floorspace
- Waitrose, Futura Park - 3,671sq m gross floorspace
- Lidl, London Road - 1,409sq m gross floorspace

## Suffolk Coastal District

Centres

5.4.15 As identified in Policy SP9 of the Suffolk Coastal Core Strategy and Development Management Policies there are 6 town centres in the district:

- Felixstowe;
- Woodbridge;
- Saxmundham;
- Aldeburgh;
- Framilingham; and
- Leiston.

5.4.16 Felixstowe and Woodbridge, located in the southern part of the district, are the largest towns in the district. Both towns are located in the southern part of the district. The smaller towns of Saxmundham, Aldeburgh, Framlingham, and Leiston contain significantly lower populations and smaller town centres. The key stores/facilities in each of the 6 town centres are set out in Figure 5.7 below.

**Figure 5.7: Town Centres in Suffolk Coastal District**

| Town Centre | No. of Units | Floorspace (sq m gross) | Key Anchor Stores/Facilities |
|---|---|---|---|
| Felixstowe | 208 | 40,200 | Co-op, Argos, Marks & Spencer, Iceland, Tesco Express, Orwell Hotel |
| Woodbridge | 191 | 30,860 | Co-op |
| Saxmundham | 64 | 10,930 | Waitrose, Tesco |
| Aldeburgh | 81 | 8,410 | Co-op, Aldeburgh Cinema |
| Framlingham | 62 | 7,840 | Co-op |
| Leiston | 72 | 9,620 | Co-op, Leiston Film Theatre |

*Source: Experian Goad and WYG Surveys, January 2017*

5.4.17 A plan showing the location of the town centres in the district is provided at **Appendix H**. Further details and vitality and viability health checks of the town centres are provided in Section 7 of this Study.

5.4.18 The 6 town centres are supplemented by 7 district centres:

- The Hill, Wickham Market;
- Cavendish Park, Felixstowe;
- Ropes Drive West, Kesgrave; and
- Sycamore Drive, Rendlesham.
- The Square, Martlesham Heath;
- High Street, Walton (Felixstowe);
- Broadlands Ways, Rushmere St Andrew; and

5.4.19 Of the 7 district centres 3 are located in the eastern fringe of Ipswich (The Square, Martlesham Heath; Ropes Drive West, Kesgrave and Broadlands Ways, Rushmere St Andrew).

5.4.20 With the exception of The Hill, Wickham Market, we have not been commissioned to review the vitality and viability of the district centres within the Suffolk Coastal District.

Out-of-Centre Retail/Leisure Provision

5.4.21 The main out-of-centre retail/leisure provision in the Suffolk Coastal District is concentrated within the eastern fringe of Ipswich at Martlesham Heath Retail Park. There are no out-of-centre retail/leisure parks in the towns of Woodbridge, Leiston, Framlingham, Saxmundham, or Aldeburgh. Felixstowe provides an edge-of-centre Homebase store on Railway Approach. There are also a number of garden centres, including Notcutts Garden Centre and Wyevale Garden Centre in Woodbridge, within the district together with some limited specialist shopping and leisure (tourist based) facilities at Snape Maltings.

**Figure 5.8: Main Out-of-Centre Retail/Leisure Parks in Suffolk Coastal District**

| | No. of Units | Vacant Units | Key Occupiers |
|---|---|---|---|
| **Eastern Fringe of Ipswich** | | | |
| Martlesham Retail Park | 10 | 1 | Hobbycraft, Topps Tiles, Next, Next at Home, M&S Simply Food, Poundland, Hughes |
| Warren Heath | 1 | - | Homebase |
| **Felixstowe** | | | |
| Railway Approach | 1 | - | Homebase |

*Source: WYG Surveys, January/February 2017*
*Notes: 4 non-food bulky comparison goods retailer units currently being built at Martlesham (Wickes, Home Bargains, Hughes Electrical (relocating from Martlesham Retail Park) and two unnamed). Planning permission also granted for a 1,500sq ft pod attached to Poundland. Aldi also currently have a planning application for a new store at Martlesham*

5.4.22 In terms of the main out-of-centre foodstores in the district the larger stores are primarily located at Martlesham Heath and Warren Heath in the eastern fringe of Ipswich and also in Felixstowe.

Ipswich Eastern Fringe

- Tesco Extra, Martlesham Heath - 8,742sq m gross floorspace
- Sainsbury's, Warren Heath - 10,457sq m gross floorspace
- M&S Simply Food, Martlesham Heath - 1,243sq m gross floorspace

Felixstowe

- Morrison's, Felixstowe - 3,712sq m gross floorspace
- Lidl, Felixstowe - 1,378sq m gross floorspace

5.4.23 The other market towns in the district provide a number of smaller out-of-centre convenience facilities including the following:

- Co-op, Saxmundham Road, Aldeburgh;
- Tesco, Saxmundham Road, Aldeburgh; and
- Co-op, High Street, Wickham Market.

## 5.5 Shopping Patterns

5.5.1 Provided below is a summary of the convenience and comparison goods retail shopping patterns in the Study Area. For convenience goods both main food and top-up shopping patterns are analysed and for comparison goods - combined comparison goods, bulky comparison goods and non-bulky comparison goods shopping patterns (excluding clothing and footwear) are examined separately. An additional analysis of shopping patterns associated with clothing and footwear purchases is also provided as these items are particularly important for the retail composition of town centres. A detailed breakdown of the comparison and convenience goods shopping patterns is shown within the market share tables at **Appendix J & K**.

5.5.2 In order to, where possible, compare the survey results of the 2010 Ipswich Retail and Commercial Leisure Study and the 2015 Suffolk Coastal Retail Capacity Refresh on a 'like for like' basis in respect of shopping trips made to tangible stores, we have stripped out any survey responses which suggest that a particular type of purchase was committed through special forms of trading.

### Convenience Goods Shopping Patterns

5.5.3 Figure 5.9 and 5.10 summarise the proportion of main food and 'top up' food shopping trips which are directed to retailers located within the Ipswich and Suffolk Coastal authority areas, based upon the results of the household survey.

**Figure 5.9: Principal Main Food Shopping Location Trip Analysis by Zone (%)**

| | Zone | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** |
| **Ipswich Borough** | **67** | **87** | **38** | **50** | **16** | **9** | **8** | **50** | **12** | **14** | **11** | **20** | **7** | **7** | **4** | **8** |
| Town Centre | 2 | 4 | 5 | 3 | 1 | | | 2 | 1 | 2 | | 1 | | | | 1 |
| Out-of-Centre | 37 | 59 | 16 | 22 | 14 | 7 | 5 | 25 | 7 | 5 | 6 | 7 | 3 | 6 | | 8 |
| District Centres | 29 | 22 | 15 | 19 | 1 | 3 | | 22 | 4 | 7 | 6 | 12 | 3 | 1 | 3 | |
| **Suffolk Coastal District** | **3** | **3** | **61** | **40** | **4** | | **5** | **50** | **86** | **85** | **88** | **76** | **81** | **83** | **83** | **11** |
| Ipswich Eastern Fringe | 2 | 2 | 52 | 37 | 1 | | | 22 | 62 | 23 | 66 | 39 | 23 | 6 | 9 | |
| Woodbridge | | | | | | | | 7 | 11 | | 4 | 1 | 1 | | | |
| Felixstowe | | | 2 | 3 | 1 | | 2 | 3 | 11 | 63 | 2 | 1 | 1 | | 2 | |
| Saxmundham | | | | 1 | 1 | | 1 | 1 | | | 8 | 4 | 25 | 67 | 39 | 10 |
| Aldeburgh | | | | | | | | | | | 1 | 1 | | | 9 | |
| Framlingham | | | | | | | 2 | | 1 | | | 11 | 31 | 1 | | |
| Leiston | | | | | | | | | | | | | | 4 | 24 | |
| Wickham Market | | | | | | | | 5 | | | 6 | 19 | | 1 | | |
| **Outside Borough/District** | **30** | **10** | **2** | **9** | **80** | **91** | **87** | | **1** | | | **4** | **13** | **10** | **13** | **81** |
| Ipswich SW Fringe | 29 | 10 | 2 | 9 | 16 | | 2 | | 1 | | | | 1 | | | |
| Other | | | | | 64 | 91 | 85 | | | | | 4 | 12 | 10 | 13 | 81 |

*Source: Table 1, Appendix J*
*Notes: Ipswich South West Fringe is Copdock/Interchange and Aldi, Donald Mackintosh Way (within Babergh District).*
*Detailed breakdown of other category provided in NEMS Survey results (Appendix A)*
*Figures may not add due to rounding.*

5.5.4 Figure 5.9 indicates that foodstores located within the Ipswich administrative area currently claim the majority market share of main food shopping in Zones 1, 2, 4 and 8 (50% in Zones 4 and 8), whilst foodstores in the Suffolk Coastal administrative area currently claim the largest market shares in Zone 8-15 (50% in Zone 8). Due to the location of Zones 5-7 relative to surrounding centres (the majority of the population being located closer to surrounding centres), foodstores in Colchester, Stowmarket, Diss, and Bury St Edmunds capture the majority of main food shopping market share in these zones. Halesworth has a large influence on main food shopping patterns in Zone 16 due to its location within the zone.

5.5.5 In terms of the Ipswich Inner Catchment (ICA[22] (Zones 1-4)) the overall retention rate is very strong (98%). The overall ICA retention rate has not changed since the 2010 Retail Study where it was also recorded as 98%. The main food market share of Ipswich Town Centre is low which reflects its limited main-food offer. The town centre captures a main food market share of just 4% within the ICA which is broadly comparable to the findings of the 2010 Retail Study (3%). The most popular store in Zone 1 is the Tesco, Copdock (25%); in Zone 2, the Asda store at Whitehouse Industrial Estate (27%); and in Zones 3 and 4, the Sainsbury's store at Warren Heath (28% and 34% respectively).

5.5.6 In terms of district centres in Ipswich, stores capture 21% of main food market share in the ICA, a significant increase to that identified in the 2010 Retail Study which identified a market share of 8%. The Asda at Stoke Park Drive District Centre, Aldi, Felixstowe Road District Centre, and Aldi, Meredith Road District Centre capture a combined main-food market share of 18%.

5.5.7 The significant influence and impact of out-of-centre foodstore provision in the ICA (particularly the Asda, Whitehouse Industrial Estate; Sainsbury's Warren Heath; Tesco Extra, Martlesham; and the Tesco Extra, Copdock) on shopping patterns within Ipswich Borough and the ICA is clearly evident from the survey findings.

5.5.8 Foodstores located in the Ipswich Eastern Fringe (within Suffolk Coastal district (primarily Tesco Extra, Martlesham; Sainsbury's Warren Heath; and M&S Simply Food, Martlesham) also have an influence on main food shopping patterns in the southern, central and north-western parts of Suffolk Coastal district including those zones comprising Woodbridge, Felixstowe, Framlingham, and Wickham Market (Zones 8-13).

5.5.9 In terms of towns in the Suffolk Coastal district the following is evident[23]:

- Felixstowe - the towns retention rate (from Zone 10) is 63% with the out-of-centre Morrison's store capturing the largest proportion of market share (30%). The out-of-centre Lidl has a 12% market share whilst the town centre Co-op captures 9% of the market share. Foodstores in Felixstowe also draw a proportion (11%) of residents from Zone 9 which is located to the north west of the town.

[22] The Ipswich ICA includes Ipswich Borough area and the eastern fringe of Ipswich (within Suffolk Coastal District (including suburbs and out-of-centre retail facilities at Martlesham)) and south western fringe of Ipswich (within Babergh district)
[23] The Suffolk Coastal Retail Capacity Refresh, 2015 does not identify separate main-food and top-up food shopping market share patterns so a comparison of market shares has not been possible.

- Woodbridge - the town retains less than 10% of main-food shopping market share from its zones (Zones 8 and 9) with the town centre Co-op being the main destination. It is noted that the Aldi in Felixstowe Road District Centre captures a main food market share of 9% from Zone 8 (which extends to the north of Ipswich) suggesting that the store is trading well. Woodridge also captures just 4% of market share from Zone 11 (Woodbridge Rural East). The Tesco store at Martlesham attracts the highest market share from Zones 8, 9 and 11 (24%, 40% and 57% respectively).
- Saxmundham - due to the two large foodstores in Saxmundham Town Centre (Tesco and Waitrose) the town not only retains the majority (67% (Waitrose 36%, Tesco 31%)) of main-food shopping market share from its zone (Zone 14) it also draws from other zones in the Suffolk Coastal district, notably Zone 11 – Woodbridge Rural East (8%), Zone 13 - Framlingham (25%), Zone 15 – Leiston/Aldeburgh (39%) and Zone 16 – Halesworth (10%).
- Aldeburgh - reflecting the lack of medium/large main foodstore facility the town captures only 9% of main food shopping from its zone (Zone 15 (shared with Leiston)). The out-of-centre Tesco Express on Saxmundham Road captures 7% of the 9% main food shopping share. The Tesco in Saxmundham is the most popular main food shop in Zone 15, attracting 25% of trips from the zone.
- Framlingham - the town retains 31% of main-food market share from its Zone (Zone 13), with the Co-op, Market Hill, capturing being the most popular destination, attracting all of this market share.
- Leiston – the towns retention rate (from Zone 15 (shared with Aldeburgh)) is 24% with the town centre Co-op capturing all of this market share. Leiston also captures a small market share (4%) from neighbouring Zone 14 (Saxmundham). The Tesco store in Saxmundham is the most popular store in Zone 15 capturing 25% of trips from the zone.

5.5.10 In terms of Wickham Market District Centre, it is evident that the Co-op on the High Street is functioning as a main food shopping for some residents attracting a market share of 19% from its zone (Zone 12). The store also attracts 5% from Zone 8 (located to the south of Wickham Market) and 6% from Zone 11, located to the east of Wickham Market). The Tesco store at Martlesham, attracting a market share of 35%, is the most popular store in the Wickham Market zone (Zone 12).

5.5.11 Top up shopping is often undertaken close to home and, as expected, both Ipswich and Suffolk Coastal district claim a very high proportion of such shopping trips which originate in proximity to their shopping facilities. This pattern is replicated elsewhere in the Study Area, with a large proportion of top up food shopping trips being undertaken in the zone in which they originate.

**Figure 5.10: Principal Top-up Food Shopping Location Trip Analysis by Zone (%)**

| | Zone | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** |
| **Ipswich Borough** | **93** | **96** | **63** | **62** | **9** | **4** | **5** | **14** | **6** | **3** | **1** | **3** | **2** | **1** | | |
| Town Centre | 6 | 6 | 8 | 5 | 1 | | | 3 | 1 | | | 2 | | | | |
| Out-of-Centre | 17 | 44 | 4 | 15 | 1 | 2 | | 6 | 1 | 2 | | | 2 | | | |
| District Centres | 63 | 21 | 23 | 26 | 6 | | 1 | 4 | 2 | 1 | 1 | 1 | | | | |
| **Suffolk Coastal District** | | **3** | **37** | **38** | | | **3** | **81** | **91** | **97** | **96** | **93** | **87** | **97** | **99** | **7** |
| Ipswich Eastern Fringe | | 1 | 13 | 36 | | | | 15 | 40 | 8 | 21 | 10 | 2 | 1 | | |
| Woodbridge | | | | | | | | 23 | 25 | | 11 | | | | | |
| Felixstowe | | 1 | | 2 | | | | 1 | 16 | 88 | 1 | | | | | |
| Saxmundham | | | | | | | | | | | 1 | 5 | 5 | 68 | 12 | 4 |
| Aldeburgh | | | | | | | | | | | 2 | 1 | | 1 | 33 | 3 |
| Framlingham | | | 2 | | | | 3 | | 3 | | 2 | 17 | 79 | 2 | | |
| Leiston | | | | | | | | | | | | | | 6 | 53 | |
| Wickham Market | | | | | | | | 16 | 2 | | 11 | 60 | | 6 | | |
| **Outside Borough/District** | **7** | **1** | | | **91** | **96** | **92** | **5** | **3** | | **2** | **4** | **11** | **2** | **1** | **93** |
| Ipswich SW Fringe | 7 | 1 | | | 5 | | | | | | | | | | | |
| Other | | | | | 86 | 96 | 92 | 5 | 3 | | 2 | 4 | 11 | 2 | 1 | 93 |

*Source: Table 1, Appendix J*
*Notes: Ipswich South West Fringe is Copdock/Interchange and Aldi, Donald Mackintosh Way (within Babergh District)*
*Detailed breakdown of other category provided in NEMS Survey results (Appendix A)*
*Figures may not add due to rounding.*

5.5.12 From scrutiny of the household survey results, we note the following top-up food shopping trends:

Ipswich and the ICA

- The retention rate within the ICA is very high (99%). This is higher than the retention rate identified in the 2010 Retail Study (94%);
- Ipswich Town Centre captures 6% of top-up food shopping market share from the ICA. The 2010 Retail Study identified a slightly higher market share (10%).
- The district centres in Ipswich capture a higher market share of top-up shopping than main-food shopping from within the ICA (33%). The Asda, Stoke Park Drive District Centre (11%); Aldi, Felixstowe District Centre (5%); Co-op Hawthorne Drive (5%) and Sainsbury's Local, Woodbridge Road (6%) are the most popular destinations for top-up food shopping.
- Out-of-centre foodstores in the ICA do not influence top-up shopping patterns in the ICA to the degree as they do for main-food shopping. The stores capture 35% of top-up market share within the ICA (compared to 70% for main-food shopping).
- The most popular top-up destination for each ICA zone is:
  - Zone 1 - Asda, Stoke Park District Centre (23%);
  - Zone 2 – Asda, Whitehouse Industrial Estate (24%);
  - Zone 3 – Tesco Metro, Ropes Drive West District Centre (21%); and

- Zone 4 – Sainsbury's Warren Heath (33%).

Suffolk Coastal District

- The out-of-centre stores in Ipswich Eastern Fringe have a significantly lower influence on top-up food shopping patterns from zones comprising Woodbridge, Felixstowe, Framlingham, and Wickham Market (Zones 8-13).
- All of the towns in the district have a higher retention level of top-up shopping than main-food shopping.  Of particular note:
  - Felixstowe has a retention rate of 88% from its zone (Zone 10) with the most popular store being Morrisons, Grange Farm Avenue (27%);
  - Woodbridge captures a top-up shopping market share of some 23% and 25% from its zones (Zones 8 and 9). The Tesco store at Martlesham attracts the highest market share from Zone 9 (31%) and a reasonable (3rd highest) market share from Zone 8 (14%).  The Co-op, Leiston and Co-op, Turban Centre, Woodbridge Town Centre are the most popular stores visited by residents in Zone 8 (both attracting a market share of 16%). In terms of Zone 11 (Woodbridge Rural East) Woodbridge attracts an 11% market share.  The most popular single store visited by residents in Zone 11 is the Tesco store, Martlesham (13%).
  - Saxmundham retains 68% of top-up shopping market share from its Zone (Zone 14) and has less of an influence on Zone 13 – Framlingham (5%), Zone 15 – Leiston/Aldeburgh (12%) and Zone 16 - Halesworth (4%).  The most popular store visited by residents in Zone 14 is the Tesco store in Saxmundham;
  - Aldeburgh retains 33% of top-up shopping from Zone 15 (shared with Leiston).  The most popular store frequented by residents living in Zone 15 is the Tesco Express in Aldeburgh (19%);
  - Framlingham has a particularly good retention rate from its zone (Zone 13) with the Co-op store being the most popular destination (79%); and
  - Leiston retains 53% of top-up shopping from Zone 15 (shared with Aldeburgh).

**Comparison Goods Shopping Patterns**

All Comparison Goods Shopping

5.5.13 Retail facilities within the Ipswich Borough retain an estimated 82% of total comparison goods expenditure from the Ipswich ICA which is a slight increase from the market share identified in the 2010 Retail & Commercial Leisure Study (80%).

5.5.14 The comparison goods shopping retention level of all retail facilities in the Ipswich ICA is assessed to be 91% which is broadly comparable to the 2010 market share (92%). This level of expenditure retention is considered to be strong. A plan showing the retention levels within the Ipswich ICA zones and the extent of Ipswich's comparison goods catchment area is attached at **Appendix L**.

5.5.15 Ipswich Town Centre is assessed to be achieving a market share of 62% from within the ICA. The town centre has seen an increase in its comparison goods market share since 2010 (57%). In contrast, out-of-centre retail facilities in the Ipswich ICA has seen a decrease in ICA market share since 2010 from 32% to 24%.

**Figure 5.11: Ipswich – Level of Comparison Goods Expenditure Retention within Ipswich Inner Catchment Area (ICA)**

| | 2010 | 2017 |
|---|---|---|
| Ipswich ICA | 92% | 91% |
| Ipswich Borough | 80% | 82% |
| Ipswich Town Centre | 57% | 62% |
| Ipswich Out-of-Centre | 32% | 24% |

*Source: Table 5, Appendix K*
*Notes: Figures may not add due to rounding*

5.5.16 It is evident that Ipswich Town Centre has strengthened its market share of comparison goods expenditure since 2010 and is competing well against surrounding centres and out-of-centre retail facilities. Indeed, we note since the Council's 2005 Retail Study the town centre has seen an increase in its comparison goods market share of some 13% (from 49%) which is a clear positive sign.

5.5.17 In terms of Ipswich Town Centre's wider catchment, it is noted that it has a strong influence on comparison goods shopping patterns in the Suffolk Coastal district zones and zones to the south, west and north. Of particular note, retail facilities in Ipswich Town Centre capture over a quarter of comparison goods expenditure from Zones 5 and 7-15 (24% from Zones 7 and 10). The most popular destination by zone is:

- Zone 1 - Ipswich Town Centre (55%);
- Zone 2 - Ipswich Town Centre (74%);
- Zone 3 - Ipswich Town Centre (57%);
- Zone 4 - Ipswich Town Centre (66%);
- Zone 5 - Ipswich Town Centre (25%) / Colchester (25%);
- Zone 6 - Bury St Edmunds (52%);
- Zone 7 - Ipswich Town Centre (24%);
- Zone 8 - Woodbridge Town Centre (31%);
- Zone 9 - Ipswich Town Centre (26%);
- Zone 10 - Felixstowe Town Centre (49%);
- Zone 11 - Ipswich Town Centre (29%);
- Zone 12 - Ipswich Town Centre (29%);
- Zone 13 - Ipswich Town Centre (31%);
- Zone 14 - Ipswich Town Centre (29%);
- Zone 15 - Ipswich Town Centre (26%); and
- Zone 16 - Norwich (33%).

5.5.18 Turning to centres within Suffolk Coastal district, the following is evident:

- Felixstowe - has a retention rate of 49% from its zone (Zone 10) which is slightly higher than that identified in the Council's 2015 Retail Capacity Study (47% at 2008). With the exception of Zone 9, where the town captures a market share of 4%, it does not draw any notable comparison goods expenditure from any other survey zones.
- Woodbridge - captures a comparison goods market share of some 31% and 22% from its zones (Zones 8 and 9). The town has strengthened its market share since 2008 where it achieved lower market share of 23% and 18% from these zones respectively (Zone 8 is partial part of Zone 4 of Council's 2008 and 2015 Retail Studies). Woodbridge also draws comparison goods expenditure from Zones 11 and 12 (27% and 10% respectively) which is broadly similar to that identified in the 2008 and 2015 studies (24% and 10% respectively).
- Saxmundham - retains 22% of comparison goods shopping market share from its Zone (Zone 14). Since 2008 the town has seen an increase in its market share by 10%. The town does not draw any notable comparison goods expenditure from any other survey zones.
- Aldeburgh - retains 9% of comparison goods expenditure from its zone (Zone 15 (shared with Leiston)). Since 2008, the town has more than doubled its market share of comparison goods expenditure in this zone (4% at 2008).
- Framlingham – has a retention rate of 23% from its zone (Zone 13) which is an increase from its 2008 market share of 15%. The town also captures a market share of 8% from neighbouring Zone 12 which is a 7% increase from its market share of 2008.
- Leiston – captures a quarter of the comparison goods expenditure from its zone (Zone 15 shared with Aldeburgh) which is higher than its market share at 2008 (19%). It also draws 4% of comparison goods expenditure from neighbouring Zone 14 which is broadly comparable to its market share at 2008.

5.5.19 Plans showing the extent of both Woodbridge and Felixstowe's comparison goods catchment areas are attached at **Appendix L**.

5.5.20 Retail facilities in Ipswich Eastern Fringe have an influence on comparison goods shopping on all of the Suffolk Coastal district zones. In particular they draw:

- between 10-20% of comparison goods expenditure from Zones 8, 9, 11, 12, and 13; and
- between 4-9% of comparison goods expenditure from Zones 10, 14 and 15.

5.5.21 In terms of Zone 1-4 retail facilities in Ipswich Eastern Fringe has a much lower influence: >1% from Zone 1; 3% each from Zones 2 and 4; and 12% from Zone 3.

5.5.22 Notwithstanding the above, the influence of retail facilities in the Ipswich Eastern Fringe has slightly diminished since 2008 with all centres in the district seeing an improvement in their comparison goods retention levels.

5.5.23 In terms of centres outside Ipswich and Suffolk Coastal administrative areas the following is noted:

- Colchester and Sudbury respectively capture 25% and 20% of expenditure from Zone 5 (retail facilities in Ipswich ICA captures 32%);
- Bury St Edmunds and Stowmarket respectively capture 52% and 19% of expenditure from Zone 6 (retail facilities in Ipswich ICA captures 17%);
- Bury St Edmunds, Stowmarket, and Diss respectively capture 21%, 20% and 13% of expenditure from Zone 7 (retail facilities in Ipswich ICA captures 30%); and
- Norwich, Halesworth and Lowestoft respectively capture 33%, 26% and 22% from Zone 16. (retail facilities in Ipswich ICA captures 3%).

5.5.24 Given the location of these centres either within or adjacent to the zones the level of comparison goods market share captured by them is not surprising or a cause for concerns. They do not necessarily suggest unsustainable shopping patterns are taking place or that Ipswich or centres within Suffolk Coastal district need to plan for additional comparison goods floorspace to capture a higher level of comparison goods market share expenditure from these zones.

<u>Non-Bulky Comparison Goods (excluding clothing and footwear)</u>

5.5.25 Retail facilities in the Ipswich ICA are retaining between 89% and 97% of non-bulky comparison goods (excluding clothing and footwear) expenditure within ICA zones (overall ICA retention rate of 93%), whilst facilities in Ipswich Borough retain between 73% and 92% of ICA (overall ICA retention rate of 81%)[24]. Retail facilities in the ICA are also therefore retaining a high level of non-bulky comparison goods expenditure derived from within the ICA.

5.5.26 Ipswich Town Centre itself draws between 54% and 78% of expenditure from ICA zones (overall ICA market share of 62%). The town centre also captures between 21-29% of expenditure from zones covering the Suffolk Coastal district (Zones 8-15).

5.5.27 The main competing towns of Bury St Edmunds, Colchester, and Sudbury have an influence on shopping patterns to the south (Zone 5), west (Zone 6) and north (Zone 7). Due to the location of these three centres to the zones the level of expenditure captured by these three centres is not considered to be of concern. Indeed, facilities in the Ipswich ICA draw the highest proportion of expenditure from Zones 5 (31%) and 7 (27%). In terms of Zone 6, Ipswich captures a slightly lower amount of expenditure (16%) with Bury St Edmunds capturing the highest market share (47%).

[24] The 2010 Ipswich Retail & Leisure Study does not identify combined non-bulky comparison goods market share shopping patterns

5.5.28 Out-of-centre retail facilities in the Ipswich ICA collectively draw a market share of between 17% and 30% from ICA zones (overall ICA market share of 24%) which reflects the relatively limited provision of non-bulky comparison goods facilities in Ipswich.

5.5.29 Turning to Suffolk Coastal district the survey identifies the following[25]:

- Felixstowe - the town retains 57% of expenditure from its zone (Zone 10). The town captures very little expenditure from any other survey zone, including zones within the Ipswich ICA.
- Woodbridge – captures 37% and 28% of expenditure from its zones (Zones 8 and 9). The town also attracts 27% from neighbouring Zone 11 (Woodbridge Rural East) and 10% from Zone 12 (Wickham Market). Retail facilities in the Ipswich Eastern Fringe draw between 13%-15% from Woodbridge's zones with Ipswich Town Centre capturing a higher proportion of expenditure (between 25-29%). Woodbridge also attracts a limited number (3-5%) of purchases from other zones within the Suffolk Coastal District (Zones 13 (Framlingham), 14 (Saxmundham), and 15 Leiston/Aldeburgh) as well as 3% of expenditure from Ipswich ICA Zone 3.
- Aldeburgh – the town retains only 11% of expenditure from its zone (Zone 15 shared with Leiston) which reflects the limited non-bulky comparison goods provision in the town. The facilities also draw a very small proportion of trips from Zones 14 (Saxmundham) and 13 (Framlingham) (2% from each).
- Leiston – the towns retention rate (from Zone 15 (shared with Aldeburgh)) for non-bulky comparison goods (excluding clothing and footwear) is 27%. The highest proportion of expenditure from the Leiston/Aldeburgh zone is captured by facilities in Ipswich (38%). The town also draws a very small level of expenditure from Zone 14 (Saxmundham) (3%).
- Saxmundham – the town captures the highest proportion of expenditure within its zone (Zone 14) retaining 32% of expenditure. It captures very little expenditure from other survey zones (between 1-3% in neighbouring zones 11-13 and 15).
- Framlingham – captures 28% of expenditure from its zone (Zone 13) and also draws 10% from neighbouring Zone 12 (Wickham Market). The town does not draw expenditure from any other zone.

[25] The Suffolk Coastal Retail Capacity Refresh, 2015, does not identify separate market share shopping patterns for non-bulky comparison goods

**Figure 5.12: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Non-Bulky Comparison Goods (excluding clothing and footwear) (%)**

| | Zone | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | **1** | **2** | **3** | **4** | **5** | **6** | **7** | **8** | **9** | **10** | **11** | **12** | **13** | **14** | **15** | **16** |
| **Ipswich Borough** | **78** | **92** | **73** | **88** | **26** | **15** | **25** | **39** | **42** | **31** | **36** | **35** | **31** | **33** | **31** | **1** |
| Town Centre | 55 | 78 | 54 | 68 | 24 | 14 | 21 | 29 | 25 | 21 | 28 | 25 | 27 | 27 | 25 | |
| Out-of-Centre | 14 | 12 | 13 | 10 | 1 | 1 | 2 | 9 | 11 | 9 | 5 | 8 | 4 | 6 | 6 | |
| District/Local Centres | 6 | | 5 | 9 | | | 1 | 1 | 6 | 1 | 2 | 2 | | | | 1 |
| **Suffolk Coastal District** | **2** | **2** | **22** | **6** | **1** | | **1** | **55** | **50** | **64** | **57** | **51** | **49** | **46** | **48** | **2** |
| Ipswich Eastern Fringe | | 2 | 14 | 3 | 1 | | 1 | 13 | 15 | 7 | 21 | 19 | 11 | 4 | 4 | 1 |
| Woodbridge | | | 3 | 1 | | | | 37 | 28 | | 27 | 10 | 5 | 4 | 3 | |
| Felixstowe | 1 | | 1 | 2 | | | | | 4 | 57 | 1 | | 1 | | 1 | |
| Saxmundham | | | | | | | | | | | 2 | 1 | 2 | 32 | 3 | |
| Framlingham | | | | | | | | | | | | 10 | 28 | | | |
| Aldeburgh | | | | | | | | | | | 1 | | 2 | 2 | 11 | |
| Leiston | | | | | | | | | | | | | | 3 | 27 | |
| Other | | | 4 | | | | | 3 | 2 | | 4 | 10 | | 2 | 1 | |
| **Outside Borough/District** | **20** | **6** | **5** | **7** | **73** | **84** | **74** | **5** | **8** | **5** | **8** | **14** | **20** | **20** | **20** | **97** |
| Ipswich SW Fringe | 16 | 3 | 2 | 4 | 4 | 1 | 1 | 2 | 5 | 4 | 2 | 3 | 1 | 2 | 3 | |
| Colchester | 3 | | 1 | | 24 | 2 | 1 | | | | 1 | 3 | 1 | | | |
| Bury St Edmunds | 1 | | | | 3 | 47 | 18 | 1 | | | 1 | | 1 | | | |
| Norwich | | | | 1 | | 1 | 7 | | | | 1 | 3 | 7 | 5 | 5 | 28 |
| Cambridge | | | | | | 2 | | | | | | | | | 1 | |
| Sudbury | | | | | 24 | | | | | | | | | | | |
| Stowmarket | | | | | | 23 | 23 | | | | | 1 | | | | |
| Lowestoft | | | | | | | | | | | | | | 9 | 6 | 22 |
| Halesworth | | | | | | | | | | | | | | 2 | | 32 |
| Chelmsford | | | | | | | | | | | | | | | | |
| London | | | | 1 | | | 1 | | 2 | | 1 | 2 | | 2 | 2 | 2 |
| Other | 1 | 2 | 1 | 1 | 16 | 8 | 22 | 2 | 1 | 1 | 3 | 3 | 9 | 1 | 3 | 13 |

*Source: Table 14, Appendix K*
*Notes: Ipswich South West Fringe is Copdock/Interchange (within Babergh District)*
*Detailed breakdown of other category provided in NEMS Survey results (Appendix A)*
*Figures may not add due to rounding.*

5.5.30 It is evident as a sub-regional centre, retail facilities in Ipswich, primarily the town centre, have an influence on shopping patterns in the Suffolk Coastal district. In contrast, as expected, the smaller town centres in the Suffolk Costal district do not draw any notable expenditure from residents in the Ipswich ICA. Having regard to the provision and role of the towns in the Suffolk Coastal district, and the location of the higher order centre of Ipswich, the retention levels of each town are considered to be reasonable. Retail facilities in the Ipswich are retaining a high level of non-bulky comparison goods expenditure with the town centre performing reasonably strongly.

Clothing & Footwear

5.5.31 Figure 5.13 shows that with the exception of Zones 6 (Stowmarket/Needham Market) and 16 (Halesworth) Ipswich Town Centre is the single most popular destination for clothing and footwear shopping in the Study Area. Whilst the popularity of Ipswich Town Centre is directly proportionate to how centrally located a zone is, the town centre secures more than three in every ten trips to purchase clothing and footwear which originate within 13 of the 16 zones. In the Ipswich ICA zones the town centre secures between 69% and 83% of all trips to purchase clothing and footwear. In the ICA as a whole Ipswich Town Centre captures a relatively strong market share of 78%. However, this is lower than the retention level achieved at 2010 (88%) which suggests a weakening in the town centre's clothing and footwear offer. It is noted that the reduction in the town centres market share is at the expense of out-of-centre facilities improving their market share (primarily Martlesham Heath. However, the ICA clothing and footwear market share of out-of-centre facilities is still minimal (7%) in comparison to the town centre (78%).

**Figure 5.13: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Clothing and Footwear (%)**

| | Zone | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| **Ipswich Borough** | **83** | **86** | **84** | **83** | **30** | **20** | **36** | **43** | **43** | **44** | **33** | **57** | **46** | **39** | **30** | |
| Town Centre | 69 | 83 | 80 | 77 | 29 | 20 | 34 | 30 | 37 | 40 | 31 | 46 | 44 | 37 | 30 | |
| Out-of-Centre | 5 | 3 | 1 | 2 | 1 | | | 10 | | 3 | 2 | 9 | 1 | | | |
| District/Local Centres | 8 | | 2 | 5 | | | | 3 | 6 | 1 | | 1 | 1 | 2 | | |
| **Suffolk Coastal District** | **4** | **6** | **10** | **10** | **2** | **1** | **1** | **33** | **38** | **44** | **51** | **24** | **19** | **33** | **42** | **2** |
| Ipswich Eastern Fringe | | 5 | 6 | 4 | 1 | | | 9 | 23 | 9 | 14 | 5 | 6 | 20 | 5 | 1 |
| Woodbridge | 1 | | 2 | 1 | | | | 20 | 10 | 4 | 30 | 12 | 3 | 6 | 2 | 1 |
| Felixstowe | 2 | 2 | 2 | 5 | | 1 | | 2 | 5 | 31 | 3 | | 1 | | 1 | |
| Saxmundham | | | | | | | | | | | 1 | 1 | 1 | 2 | 3 | |
| Framlingham | | | | | | | 1 | | | | | 4 | 4 | | | |
| Aldeburgh | | | | | 1 | | | 1 | | | | | | 2 | 10 | |
| Leiston | | | | | | | | | | | | | | 3 | 19 | |
| Other | | | | | | | | 1 | | | 2 | 2 | 4 | | | |
| **Outside Borough/District** | **13** | **6** | **7** | **7** | **68** | **78** | **63** | **24** | **18** | **11** | **16** | **19** | **35** | **28** | **28** | **98** |
| Ipswich SW Fringe | | 1 | | | | | | | | 1 | | | | | | |
| Colchester | 2 | 1 | 1 | 1 | 30 | | | 1 | 2 | | 1 | | | | | |
| Bury St Edmunds | 1 | 1 | 3 | | 13 | 59 | 32 | 9 | 1 | 1 | 1 | 2 | 2 | | | |
| Norwich | 1 | 1 | | | 3 | | 11 | | 1 | 1 | 4 | 6 | 16 | 13 | 10 | 57 |
| Cambridge | 1 | | | 1 | 1 | 1 | 1 | | | | | 7 | 1 | | | |
| Sudbury | | | | | 6 | | | | | | | | | | | |
| Stowmarket | | 1 | | | | 8 | 10 | | | | | | | | 1 | |
| Lowestoft | | | | | | | | | 1 | | | 1 | 1 | 5 | 6 | 17 |
| Halesworth | | | | | | | | | | | | | | 1 | 1 | 10 |
| Chelmsford | | | | | 7 | | | | | | | | | | | |
| London | | 1 | 1 | 1 | 2 | 2 | | 11 | 10 | | 4 | 1 | 1 | 3 | | |
| Other | 8 | 1 | 2 | 4 | 6 | 8 | 9 | 3 | 3 | 8 | 7 | 2 | 14 | 6 | 10 | 14 |

*Source: Table 1, Appendix K*
*Notes: Ipswich South West Fringe is Copdock/Interchange (within Babergh District)*
*Detailed breakdown of other category provided in NEMS Survey results (Appendix A)*
*Figures may not add due to rounding.*

5.5.32 The main competing centres outside Ipswich Borough/Suffolk Coastal District have not experienced an increase in ICA market share (broadly remained unchanged since 2010 (9% compared to 8% in 2010). The overall retention rate of clothing and footwear purchases within the ICA (89%) is broadly comparable to the retention rate identified in the 2010 Study (90%).

5.5.33 The survey results show that Ipswich Town Centres clothing and footwear catchment is curtailed to the south, west and north west (Zones 5, 6 and 7) primarily by the attraction of retail facilities in Colchester and Bury St Edmunds and to a lesser extent Stowmarket, and the north (Zone 16) by a combination of retail facilities within centres in the Suffolk Coastal district and Norwich, Lowestoft and Halesworth.

5.5.34 In terms of towns in the Suffolk Coastal district, the following is evident[26]:

- Felixstowe - the towns retention rate (from Zone 10) of clothing and footwear purchases is 31% with Ipswich Town Centre drawing 40% from Felixstowe and facilities in the Ipswich Eastern Fringe attracting 9% of purchases. Ipswich curtails Felixstowe's catchment beyond Zone 10 but the town does attract a small number of residents from nearby Zones 4 (5%), 9 (5%) and 11 (3%).
- Woodbridge – largely as a result of the stronger facilities in Ipswich (primarily Ipswich Town Centre), Woodbridge only retains 20% and 10% of clothing and footwear purchases in its zones (Zones 8 and 9). The town does however attract 30% of purchases from neighbouring Zone 11 (Woodbridge Rural East) and 12% from Zone 12 (Wickham Market). It also attracts a limited number (3-6%) of purchases from other zones within the Suffolk Coastal District (Zones 10 (Felixstowe), 13 (Framlingham) and 14 (Saxmundham)).
- Aldeburgh – the primarily higher brand clothing and footwear stores in the town centre retain 10% of clothing and footwear purchases from its zone (Zone 15 shared with Leiston). The stores also draw a very small proportion of trips from Zone 14 (Saxmundham) (2%).
- Leiston – the towns retention rate (from Zone 15 (shared with Aldeburgh)) for clothing and footwear is 19% with the most popular destination in the zone being Ipswich Town Centre (30%). The only other zone where the town attracts a proportion of clothing and footwear purchases is Zone 14 (Saxmundham) (3%).
- Saxmundham & Framlingham – the very limited (>4%) market share levels of clothing and footwear purchases identified by the survey are reflected in the minimal clothing and footwear shops present in the towns. The most popular clothing and footwear destination in the Framlingham and Saxmundham zones (Zones 13 and 14) is Ipswich Town Centre. Norwich also draws a proportion of clothing and footwear from the two zones (16% and 13%).

5.5.35 Reflecting their role and function in the shopping hierarchy for 'day to day' local shopping/services the household survey results also show that the district and local centres in both Ipswich Borough and Suffolk Coastal District only attract a limited amount of clothing and footwear purchases.

5.5.36 The survey results show that, in line with its sub-regional role, Ipswich Town Centre is the most popular destination for clothing and footwear shopping. Centres within Suffolk Coastal district, in particular Woodbridge and Felixstowe, attract little from the Ipswich ICA. Having regard to the role and existing

[26] The Suffolk Coastal Retail Capacity Refresh, 2015, does not identify separate market share shopping patterns for clothing and footwear

clothing and footwear provision in Suffolk Coastal district centres the market shares/catchments are considered to be reasonable and in line with their role in the sub-regional hierarchy.

<u>Bulky Comparison Goods</u>

5.5.37 Retail facilities in the Ipswich ICA are retaining some 91% of ICA derived bulky comparison goods expenditure[27]. Stores/centres in Ipswich Borough retain 80% of such expenditure from the ICA.

**Figure 5.14: Principal Comparison Goods Shopping Destinations Trip Analysis by Zone – Bulky Comparison Goods (%)**

| | Zone | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 |
| **Ipswich Borough** | **80** | **90** | **71** | **86** | **34** | **11** | **22** | **49** | **57** | **36** | **54** | **42** | **40** | **40** | **45** | **5** |
| Town Centre | 28 | 48 | 30 | 31 | 23 | 7 | 17 | 14 | 13 | 7 | 29 | 17 | 24 | 27 | 18 | 5 |
| Out-of-Centre | 47 | 46 | 39 | 47 | 11 | 4 | 5 | 33 | 42 | 27 | 21 | 24 | 16 | 12 | 26 | |
| District/Local Centres | 3 | 1 | 2 | 8 | | | | 2 | 3 | 2 | 4 | 1 | | 1 | 1 | |
| **Suffolk Coastal District** | **4** | **4** | **25** | **3** | **1** | **1** | **3** | **43** | **37** | **57** | **42** | **48** | **49** | **37** | **44** | **2** |
| Ipswich Eastern Fringe | 1 | 2 | 13 | 1 | | 1 | 2 | 11 | 12 | 6 | 17 | 17 | 10 | 7 | 4 | 1 |
| Woodbridge | 2 | 1 | 4 | 1 | | | | 25 | 14 | | 20 | 9 | 2 | 2 | 1 | |
| Felixstowe | | | | 1 | | | | | 5 | 50 | 1 | | | | 1 | |
| Saxmundham | | | | | | | | | | | | 2 | 1 | 20 | 8 | |
| Framlingham | | | | | | | 1 | 2 | | | 1 | 11 | 33 | 1 | | |
| Aldeburgh | | | | | | | | | | | | | | | 3 | |
| Leiston | | | | | | | | | | | | | | 7 | 26 | |
| Other | | 1 | 7 | | 1 | | | 5 | 7 | | 3 | 10 | 3 | 1 | | 1 |
| **Outside Borough/District** | **16** | **7** | **4** | **11** | **65** | **89** | **75** | **8** | **6** | **7** | **4** | **10** | **10** | **23** | **11** | **93** |
| Ipswich SW Fringe | 12 | 5 | 2 | 3 | 3 | 1 | 3 | 3 | 2 | 5 | 1 | 4 | 1 | 1 | 3 | |
| Colchester | 2 | 1 | 1 | 6 | 17 | | 1 | | | 1 | | | | | | |
| Bury St Edmunds | | | | | 3 | 60 | 17 | 1 | | | 1 | 1 | 1 | | | |
| Norwich | | | | | | | 3 | | 2 | 1 | 1 | 2 | 2 | 1 | 1 | 13 |
| Cambridge | | | | | | 2 | | | | | | | | | | |
| Sudbury | | | | | 29 | | | | | | | | | | | |
| Stowmarket | | | | | | 21 | 23 | | | | | | | 1 | | |
| Lowestoft | | | | | | | | | | | | | | 13 | 3 | 33 |
| Halesworth | | | | | | | | | | | | | 2 | 5 | 1 | 32 |
| Chelmsford | | | | | | | | | | | | | | | | |
| Diss | | | | | | | 14 | | | | | 1 | 2 | | | |
| London | | | 1 | | 1 | | 1 | 1 | 1 | | 1 | 2 | | 1 | | |
| Other | 2 | 1 | 1 | 2 | 10 | 5 | 13 | 4 | 2 | | | | 2 | 1 | 3 | 15 |

*Source: Table 13, Appendix K*
*Notes: Ipswich South West Fringe is Copdock/Interchange (within Babergh District)*
*Detailed breakdown of other category provided in NEMS Survey results (Appendix A)*
*Figures may not add due to rounding.*

5.5.38 Despite bulky comparison goods being typically purchased at out-of-centre locations, Ipswich Town Centre captures some 33% of bulky comparison goods expenditure from the Ipswich ICA. The majority of expenditure is still however captured by out-of-centre retail facilities in Ipswich (primarily Euro Retail Park).

[27] The 2010 Ipswich Retail & Leisure Study does not identify combined bulky comparison goods market share shopping patterns

5.5.39 Retail facilities in the Ipswich ICA also capture bulky comparison goods expenditure, to varying degrees, from all other survey zones. Of particular note, Ipswich Town Centre itself captures between 17-29% of market share from Zones 5, 7, 11, 12, 13 and 14.

5.5.40 In terms of centres within Suffolk Coastal district the following bulky comparison goods shopping patterns are evident[28]:

- Felixstowe – retains half of bulky comparison goods expenditure from its zone (Zone 10). It also captures a small level of market share from Zone 9 (5%). It does not draw any notable expenditure from any other survey zones, including the Ipswich ICA zones.
- Woodbridge – Out-of-centre bulky comparison goods facilities in the Ipswich ICA have a particular influence on Woodbridge zones (Zones 8 and 9) capturing the highest market share levels (61% and 58% respectively). Woodbridge retains only 25% and 14% market share from Zones 8 and 9. The town also draws a level of comparison goods expenditure from Zones 11 and 12 (20% and 9% respectively).
- Saxmundham - retains 20% of market share from its Zone (Zone 14). It also captures a 8% market share from neighbouring zone 15. The town does not draw any notable expenditure from any other survey zones.
- Aldeburgh – due to the lack of bulky comparison goods facilities the town only retains 3% market share from its zone (Zone 15 (shared with Leiston)). It does not capture any notable market share from any other zone.
- Framlingham – considering its limited level of bulky comparison goods facilities the town has a reasonably healthy retention rate of 33% from its zone (Zone 13). It also captures a market share of 11% from neighbouring Zone 12 (Wickham Market).
- Leiston – captures a market share of 26% from its zone (Zone 15 shared with Aldeburgh). It also draws 7% of expenditure from neighbouring Zone 14.

5.5.41 Out-of-centre bulky comparison goods retail facilities in Ipswich Eastern Fringe draw trade, to varying degrees, from all of the Suffolk Coastal district zones. They capture between 10-17% of expenditure from Zones 8, 9, 11, 12, 13 and between 4-10% from Zones 10, 14, and 15. The bulky comparison goods facilities also draw 13% of expenditure from Ipswich ICA Zone 3 which is lower than we would have anticipated given that they are located within this zone.

[28] The Suffolk Coastal Retail Capacity Refresh, 2015 does not identify separate bulky comparison goods shopping market share patterns so a comparison of market shares has not been possible.

5.5.42 Overall, there is a good retention level of bulky comparison goods expenditure in the Ipswich ICA. The centres within the Suffolk Coastal district and outside the study area have very little influence of bulky comparison goods shopping patterns in the Ipswich ICA. This is not surprising given the reasonably limited provision of bulky comparison goods facilities in the district towns.

## 5.6 Surrounding Main Large Centres & Pipeline Developments

5.6.1 Ipswich and the towns in Suffolk Coastal District do not operate in isolation. It is important to understand the nature of the existing and emerging retail and commercial leisure offer in surrounding 'competing' centres given that planned improvements could potentially materially impact upon shopping and leisure patterns, future performance and overall vitality and viability of centres.

5.6.2 The household survey identifies that the main large surrounding centres which draw residents from the survey area for shopping and leisure are Colchester, Bury St Edmunds, Sudbury, Stowmarket and to a lesser degree Norwich. A summary of each of the centres is provided in turn below.

5.6.3 Both Tendring and Waveney Councils have not identified any forthcoming retail or leisure development scheme in other towns in their administrative area which are likely to impact on relevant shopping or leisure patterns in Ipswich Borough or Suffolk Coastal District.

**Colchester**

5.6.4 Colchester lies to the south west of the Ipswich/Suffolk Coastal area approximately 18 miles from Ipswich. The town centre provides some 657 retail and commercial leisure units and is the principal shopping and leisure destination in the borough. Primark are due to shortly re-occupy the former BHS store in the town centre and a new boutique cinema and associated A3/A4 units are also due to open later this year on Queen Street.

5.6.5 The most recent Retail and Leisure Study undertaken on behalf of the Council (December 2016) identifies some 4,250sq m net of convenience and 18,650sq m net comparison goods floorspace capacity need to 2033. In terms of commercial leisure, the study advises that the Council should further diversify the town centre's food and drink offer. Vineyard Gate in the town centre is identified as the prime opportunity for large scale retail and leisure development. The study advises that the site could make a substantial contribution towards the regeneration of the town centre. Other development opportunities include Priory Walk (retail enhancement opportunity) and St Botolph's (mixed use development with more focus leisure offer).

5.6.6 The town also provides a number of out-of-centre retail and leisure parks the largest one being at Tollgate (circa 21 units) on the western side of Colchester. The Secretary of State has recently approved (August 2017) a planning appeal for a significant mixed use development at Tollgate. The scheme, comprising 11,413sq m net comparison goods floorspace, 1,394sq m net convenience goods floorspace, 5,010sq m net flexible A1-A5 retail floorspace, 950sq m flexible A3-A5 floorspace and 6,690sq m D2 floorspace (to include a 1,300 seat cinema and indoor adventure centre), was refused by Colchester Borough Council in February 2016.

5.6.7 In terms of other large forthcoming developments, the Council has granted outline planning permission (ref. O/COL/01/1622) for a scheme to the north of the town which includes a community stadium, hotel, health and fitness facility and food and drink outlets, known as Northern Gateway. The Community Stadium and health and fitness club (David Lloyd) have been developed alongside a park and ride facility. A resolution to grant planning permission (ref. 160825) for an alternative leisure scheme including a 12-screen cinema, up to 12 restaurant units, 80 bed hotel and leisure units was issued by Colchester Borough Council Planning Committee in July 2017. The Northern Gateway is anticipated to be a commercial leisure destination on the northern entrance to Colchester to complement the town centre's retail offer.

### Bury St Edmunds

5.6.8 Bury St Edmunds is located to the west/north-west of Ipswich/Suffolk Coastal Area approximately 27 miles from Ipswich. The town centre offers some 438 retail and service units and has improved its retail and leisure offer since the opening of the Arc Shopping Centre in March 2009. The Arc is anchored by a Debenhams store (circa 6,900sq m) alongside 37 other shops including Next, Monsoon, Topshop, H&M, HMV, Joules and Pandora. Numerous bars, restaurants and cafes including Nandos, Wagamama, Byron and Carluccios are also present together with a concert hall, The Apex, and an 850 space car park.

5.6.9 Retail and leisure services within the town centre are also provided at Cornhill, Buttermarket and The Traverse (the town's historic streets). A number of independent retailers are located at Abbeygate Street towards the south of the centre. To the west of the town centre along Parkway is a multi-screen cinema operated by Cineworld and number of national multiple operator restaurants including Giraffe, Ask Italian and Frankie & Benny's.

5.6.10 Out-of-town retail and leisure facilities is primarily provided at St Edmundsbury Retail Park, Barton Retail Park and Robert Boby Retail Park.

5.6.11 The latest Retail and Leisure Study undertaken on behalf of the Council, alongside Forest Heath District Council (February 2017), identifies a need for up to 1,359sq m convenience floorspace by 2031, the majority of which is directed towards Bury St Edmunds. The level of comparison goods floorspace requirement by the end of the plan period (2031) is identified at 11,109sq m. The study identifies that there is scope to improve the range and quality of provision in the town centre, particularly the quality of the restaurant offer and the pub/ bar provision. It also identifies that there is sufficient demand to support one new health and fitness leisure facility within the borough.

5.6.12 There is currently an extant planning permission (ref. DC/15/0087/FUL), granted in December 2015, for a retail park development at Haldo House, Western Way for two A1 units. An alternative planning permission (ref. DC/16/0508/FUL) was granted in December 2016 for a convenience store and two bulky goods units at the same site. The development has not yet been bought forward. St Edmundsbury Borough Council have not identified any other forthcoming retail/leisure development schemes in the town.

**Sudbury**

5.6.13 Sudbury is located to the west of Ipswich Borough and Suffolk Coastal District administrative areas, approximately 21 miles from Ipswich and 33 and 35 miles from Woodbridge and Felixstowe respectively. Sudbury is a compact historic market town situated within Babergh District Council administrative area. The town centre provides a total of 258 retail and leisure units. The shopping facilities within the town are centred on Market Hill and North Street where the majority of the town's national multiple retailers are located. National multiple retailers located within the town centre include Dorothy Perkins, New Look, Argos, Boots and WH Smiths. In terms of leisure facilities, there are no cinemas or concert venues located within the town centre. Sudbury Quay Theatre is located just outside of the town centre.

5.6.14 Out of centre retail provision comprises one retail park, Shawlands Retail Park, with current occupiers of Topps Tiles, Pets at Home, Halfords, Carpetright, Farm Foods and 99p Stores. There are also standalone stores including B&Q and Tesco both at Springlands Way, Homebase at Waldingfield Road and Sainsbury's at Cornard Road.

5.6.15 The 2015 Babergh and Mid Suffolk Town Centres & Retail Study identifies comparison goods floorspace capacity of 4,699sq m for Sudbury Town Centre by 2031. The study also identifies that there is potential to support two new branded health and fitness leisure centres within the area and also opportunity to increase the cinema provision, with particular reference to smaller art house style cinemas. In terms of food and drink offer, it is advised that provision could be improved within both Sudbury and Stowmarket.

5.6.16 In terms of forthcoming retail/leisure development, there is a current planning application (ref. B/15/1718) for the development to the north of Sudbury, known as 'Chilton Woods', which includes *inter alia* up to 1,150 dwellings, 15ha employment development, a hotel, village centre of 1,000sq m gross floorspace, primary school and open space. There is no set timescales for the determination of the planning application.

5.6.17 Babergh District Council has not identified any other forthcoming retail/leisure development schemes in Sudbury.

### Stowmarket

5.6.18 Stowmarket is Mid Suffolk's principal town and serves the majority of its surrounding rural settlements. The town is located approximately 13 miles to the north west of Ipswich Town Centre and some 19 and 28 miles to Woodbridge and Felixstowe respectively. Stowmarket is a medium sized market town with the River Gipping running to the east of the town. Its shopping area is focussed along Market Place and Ipswich Street and supplemented by the Meadow Centre, which includes an Asda foodstore. The town centre contains a total of 145 retail units, the majority of which (70) comprises services. The proportion of national multiple comparison retailers is broadly in line with the national average, although it is noted the comparison sector contains below average figures for ladies and menswear clothing shops. The town centre also benefits from a modern and popular cultural facility on Church Walk, the John Peel Centre.

5.6.19 In terms of comparison goods capacity for Stowmarket Town Centre, the 2015 Babergh and Mid Suffolk Town Centres & Retail Study identifies floorspace capacity of 2,533sq m by 2031. The Retail Study also identifies that Stowmarket could benefit from additional food and drink provision.

5.6.20 In terms of new investment/potential development opportunities within the town centre, the Station Quarter has been identified as a strategic site for mixed use development for a number of years. Refurbishment of Ipswich Street is also identified as being *"critical"* to the vitality and viability of the town centre. There are currently no timescales for the potential delivery of the above investments.

5.6.21 In terms of forthcoming retail/leisure development, Mid Suffolk District Council has identified that planning permission (ref. 3669/13) was granted in April 2015 for 33 residential units (Use Class C3) and 100sq m restaurant/ café (Use Class A3) and outline permission for a 55-bed hotel (Use Class C1) at Prentice Road, Stowmarket. The site is located to the south of Stowmarket Station. As far as we are aware a reserved matters application for the hotel element has not been progressed to date. The Council has also identified that outline planning permission has recently been granted for up to 4,067sq m gross comparison goods retail warehouse floorspace on Gipping Way. There is also a current 'hybrid' planning application for a mixed use development proposal , including three commercial leisure units (McDonalds, Costa Coffee drive-thru and Marston Public House), at Gun Cotton Way.

### Norwich

5.6.22 Norwich is located to the north of Ipswich and Suffolk Coastal administrative areas and is approximately 45 miles from Ipswich Town Centre. The results from the NEMS household survey commissioned as part of this study identify that Norwich does not have as strong an influence on shopping patterns in the study area as we had anticipated. Of particular note it attracts no more than 1% of market share from zones 1-6 and 8-10, between 2-4% from Zones 11 and 12, and between 7-8% from Zones 7 and 13.

5.6.23 Norwich City Centre comprises some 223,987sq m retail floorspace within some 1,023 retail units. The main shopping areas include St Stephens Street, Red Lion Street, Haymarket, Gentlemen's Walk, Market

Place and Castle Street. These are supplemented by secondary retail areas towards the north east of the centre at London Street and north west comprising Norfolk House and Lower Goat Lane.

5.6.24 Norwich City Council are currently in the process of carrying out an updated 'Greater Norwich Retail, Leisure and Employment Study'. The study is due to be published later this year.

5.6.25 In terms of forthcoming retail/leisure development Norwich City Council has confirmed the following:

- Anglia Square – planning permission granted for comprehensive redevelopment for mixed use development, retail (circa 20,000sq m), residential and food and drink and uses, relocation of Surrey Chapel, car park, access and bridge link from St Crispins. An alternative redevelopment scheme is currently being bought forward and is at pre-application stage.
- Castle Mall - currently undergoing partial refurbishment/redevelopment to create a restaurant quarter on level 4 is currently being implemented and under construction.

## 5.7 Summary

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

5.7.2 In terms of the sub-regional centre hierarchy it is evident that Ipswich, classified as a 'Regional Centre', has not only maintained its position but has seen a slight improvement in its ranking over the last 7 years. It is ranked higher than the nearest larger centres of Chelmsford, Colchester and Bury St Edmunds which clearly demonstrates its strength in the sub-region. In the Suffolk Coastal district area, the highest ranked centre, Felixstowe Town Centre, classified as a 'Major District Centre', has also seen an improvement in its rankings. Woodbridge Town Centre, primarily due to the lower provision of national multiple retailers, sits below Felixstowe in the rankings.

5.7.3 Both the socio demographics of a catchment area of a town and its ranking in the sub-regional hierarchy will, in part, have an impact on the quantum and type of retail and leisure provision and demand in a town centre. The type of retail and leisure provision and requirements/demands for the town centres in the two council areas is discussed in the following sections of the study.

5.7.4 The household survey findings demonstrate that Ipswich Town Centre is competing well against the surrounding main centres. Current shopping retention levels are considered to be good and have improved over the last 10 years. Whilst Ipswich draws retail expenditure from residents residing in the Suffolk Coastal district area this is to be expected given the sub-regional role and catchment of the town centre. Given the location of Ipswich and the size, role and provision of facilities in the towns in Suffolk

Coastal district, retention levels in the districts town centres are also considered to be good and not a cause for concern.

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

# 6.0 Qualitative Assessment - Ipswich Town Centre & District Centres Health Checks

## 6.1 Introduction

6.1.1 The NPPF identifies a number of factors which are of relevance in delivering sustainable development, with one such factor being the need to ensure the vitality of town centres. Paragraph 23 of the NPPF states that local authorities should promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Paragraph 23 also requires local planning authorities to recognise that town centres are at the heart of their communities and to pursue policies that support their viability and vitality. It is also noted that competitive town centre environments should be promoted in order to enhance customer choice, provide a diverse retail offer, and in order to reflect the individuality of town centres.

6.1.2 Whilst the NPPF does not provide a list of indicators to be used to assess the health of a centre, such criteria has been published in the Government's Planning Practice Guidance: Ensuring the Vitality of Town Centres. Indicators which should be monitored on a regular basis in order to judge the health of a centre and its performance over time include the following:

- Diversity of uses – data on the diversity of uses was collated during fieldwork in January/February 2017.
- Proportion of vacant street level property – vacant properties were also identified during the undertaking of on-site surveys.
- Retailer representation – information on the current strength of the defined centres, retailer representation and retailer requirements has been derived from on-site surveys and various published sources.
- Commercial rents – where available rental data has been sourced from recognised UK property consultants.
- Pedestrian flows – general footfall and pedestrian flows were also observed during WYG's on-site surveys.
- Accessibility – consideration of access to and around the centres is informed by WYG's on-site surveys.
- Perceptions of safety and occurrence of crime – informed by our observations and initiatives present in each centre.
- Views and behaviour – Information on views is based on the NEMS household survey results and feedback from key stakeholders.

- State of town centre environmental quality – consideration of the quality of the buildings and public realm in the centre has also been informed by WYG's 'on the ground' observations.

6.1.3 To ensure the current health checks were compiled using the most up-to-date diversity of use information, surveys of each centre were undertaken by WYG in January/February 2017.

6.1.4 A health check assessment of Ipswich Town Centre was undertaken as part of the previous Ipswich Retail & Commercial Study of 2010. For the purposes of the Study, the health check assessment was based on the Experian Goad boundary area of the town centre (survey undertaken by Experian in October 2009). To inform this current Study, and to enable 'like for like' comparisons with the previous health check survey, we undertook a new survey of Ipswich Town Centre in January 2017. The use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data. It should however be noted that the 2017 Goad Plan has been extended to include specialist/independent shopping frontage along St Peters Street and service/retail provision on Fore Street. It should also be noted that, due to on-going refurbishment works in the upper floor of the Buttermarket Shopping Centre (to incorporate a new Empire Cinema), the Goad Plan does not fully reflect the eventual layout of the upper floor.

## 6.2 Ipswich Town Centre

6.2.1 The adopted Local Plan seeks to maintain and enhance Ipswich Town Centre's position as a sub-regional shopping, leisure, historic and cultural destination. It seeks to safeguard the Central Shopping Area (CSA) as the focus of town centre and that new office, hotel, cultural and leisure development be focussed in Ipswich Town Centre.

6.2.2 The town centre has a number of distinct retail/leisure areas that collectively form the CSA. The extent of the CSA is defined within the adopted Ipswich Local Plan Policies Map.

6.2.3 The pedestrianised areas of Tavern Street, Westgate Street, Buttermarket, Cornhill, and Carr Street and the Buttermarket and Sailmakers centres provide the main shopping and leisure offer in the town centre. The majority of national multiple operators are located in the pedestrianised areas and the two shopping/leisure centres. Upper Brook Street, located to the east of Buttermarket, also provides a number of national multiple occupiers including Sainsbury's and Wilko.

6.2.4 St Nicholas Street and St Peter's Street, located in the southern part of the centre, provide a very different offer to the main pedestrianised shopping streets in the town. The two streets have established themselves as a specialist retail/service area with units primarily occupied by independent businesses. The shops are generally small format units and have a different character to the surrounding areas.

6.2.5 Other secondary shopping streets in the town centre include:

- North - Crown Street, Northgate Street, Tower Street, Lloyds Avenue - a mix of retail and leisure service units together with the Crown Pools Leisure Centre and offices.
- South – Tacket Street, Dogs Head Street, Falcon Street, Princes Street - includes a mix of mainly small retail and leisure service units.
- East - Upper Orwell Street, Fore Street, St Helen's Street and St Margaret's Street - primarily contains small leisure service units and the Regent Theatre and former Odeon cinema unit.
- West – St Matthews Street, Civic Drive – primarily contains retail units alongside New Wolsey Theatre.

6.2.6 The town centre benefits from a number of active key stakeholders which are seeking to, *inter alia*, improve the town centre as a place to visit and shop, attract and deliver investment, and encourage more visitors and businesses to the town centre. The key stakeholder groups are:

- 'Ipswich Central' Business Improvement District (BID) - The BID was established in 2007 and is now in its third, 5 year period, term. Ipswich Central's vision is to create *"East Anglia's Waterfront Town"*. The BID zone extends beyond the town centre, including the main gateways into Ipswich including the train station, waterfront and Ipswich Town Football Club. The BID has informed us that since 2007, they have introduced more than £4 million of investment to the BID zone.
- Ipswich Vision - The Ipswich Vision Group is a partnership of the following key Ipswich stakeholders: Ipswich Borough and Suffolk County councils; New Anglia LEP; Ipswich MP Sandy Martin; Ipswich Central BID; University of Suffolk; and the Suffolk Chamber of Commerce. The stakeholders have agreed to deliver a single Vision to *"create the successful county town centre which Ipswich and Suffolk expect and deserve through supporting regeneration, better transport, better shopping and improvement to public spaces and public buildings*".
- Ipswich Destination Management Organisation (DMO) - The DMO was created in 2015. Its purpose being to promote the town as *"a destination for visitors and as the Gateway to Suffolk, encouraging exploration of the area from the county town"*. The DMO works in partnership with the Ipswich BID to enhance the visitor offer of Ipswich. Their current target markets are: existing visitors/1hr drive time/day visitors to stay visitors and sports visits.
- New Anglia Local Enterprise Partnership (LEP) – The LEP is a business-led collaboration between the private, public and education sectors across Norfolk and Suffolk. The LEPs ambition is to drive economic growth in the region. The LEP has assisted in facilitating the proposed redevelopment of the Cornhill.

6.2.7 With these key stakeholders in place, Ipswich Town Centre is in a much better place to be able to continue to attract/deliver investment and encourage more visitors/footfall which will in turn enhance the vitality and viability of the town centre.

## Diversity of Uses

6.2.8 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix M**.

6.2.9 It should be noted that Figures 6.1 and 6.2 exclude a number of uses, including health centres, religious institutions and educational institutions (Use Class D1) as well as offices (Use Class B1). The town centre Experian Goad Plan identifies other uses to include, *inter alia*: 39 office buildings; dwellings (identified in 11 dwelling blocks/buildings); 8 Churches/Places of Worship; 2 health centres; 5 dental surgeries; a tourist information office; 3 advice centres; 2 libraries (County Library & Ipswich Institute Reading Room & Library); and a Citizen Advice Bureau.

**Figure 6.1: Ipswich Town Centre Diversity of Use for Commercial Units**

| | 2009 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 47 | 8 | 54 | 8 | 9 |
| Comparison | 231 | 37 | 208 | 32 | 32 |
| Retail Service | 75 | 12 | 91 | 14 | 14 |
| Leisure Service | 115 | 18 | 131 | 20 | 24 |
| Financial & Business Service | 72 | 11 | 79 | 12 | 11 |
| Vacant | 85 | 14 | 96 | 15 | 11 |
| **Total** | **625** | **100** | **659** | **100** | **100** |

*Source: Experian Goad Survey, September 2009 and November 2016 (updated by WYG January 2017)*
*UK average figure is at November 2016 (latest available at time of writing)*
*% figures may not add due to rounding*

**Figure 6.2: Ipswich Town Centre Diversity of Use for Commercial Floorspace**

| | 2009 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m Gross | % | Sq m Gross | % | % |
| Convenience | 7,702 | 5 | 8,840 | 6 | 16 |
| Comparison | 75,409 | 50 | 66,750 | 44 | 36 |
| Retail Service | 7,664 | 5 | 8,630 | 6 | 7 |
| Leisure Service | 28,893 | 19 | 31,290 | 21 | 25 |
| Financial & Business Service | 12,886 | 9 | 14,010 | 9 | 8 |
| Vacant | 18,934 | 13 | 20,884 | 14 | 9 |
| **Total** | **151,488** | **100** | **150,404** | **100** | **100** |

*Source: Experian Goad Survey, September 2009 and November 2016 (updated by WYG January 2017)*
*UK average figure is at November 2016 (latest available at time of writing)*
*% figures may not add due to rounding*

6.2.10 Retail/leisure services are also provided in the outdoor Ipswich Market. The market is mainly located on the Cornhill but also extends along Princes Street and into Lloyds Avenue. The Market operates every Tuesday, Thursday, Friday and Saturday and can provide up to 38 pitches/stalls. At the time of writing the market provided between 20-25 stalls (depending on the day) occupied by a range of businesses selling*, inter alia*, fruit and vegetables, coffee, bread, flowers, bags, phones, cheese, jewellery, fashion goods, cakes, and takeaway food.

Convenience Goods

6.2.11 Figure 6.1 indicates that the current number of convenience stores in the town centre is slightly below the UK average level of provision, with the 54 units in this use comprising 8% of the stock of commercial units. Convenience units together provide a total floorspace of 8,840sq m. Convenience floorspace represents 6% of all town centre commercial floorspace, which is significantly below the national average of 16%. However, this relative under-representation compared to the national average is expected within a town centre of sub-regional importance as such centres typically provide a larger level of comparison goods floorspace.

6.2.12 There is no large format convenience superstore within the town centre area, with the convenience offer provided across a number of smaller scale foodstore, as well as by Ipswich Market. The three main convenience stores at the time of our survey were the Sainsbury's Local, on Upper Brook Street, the Iceland store in Sailmakers Shopping Centre and the Little Waitrose on Princes Street. A Tesco Express store is also located on St Matthew's Street adjacent to the Central Shopping Area. The existing convenience facilities in the town centre primarily meet the day-to-day shopping top-up needs of residents/visitors, rather than enabling them to undertake a main food shop.

6.2.13 Since the 2010 Retail & Leisure Study, the overall number of convenience goods outlets in the centre has increased by 7. Iceland has relocated from St Matthew's Street into the Sailmakers Shopping Centre, Waitrose has opened a 'Little Waitrose' format store on Princes Street, and the Co-op store on Carr Street has closed.

6.2.14 A good level of independent convenience stores remain in the town, in the most part dispersed across the more secondary shopping frontage. National convenience retailers, including Patisserie Valerie, Holland and Barrett and Greggs, are also reasonably well represented and generally occupy positions closer to the 'prime pitch'.

Comparison Goods

6.2.15 The number and proportion of comparison goods units in the town centre has fallen since 2009 (from 231 (37%) to 208 units (32%)). The current proportion of comparison goods units in the town centre is identical to the national average. In floorspace terms, whilst the amount and proportion of floorspace devoted to comparison goods has also fallen (from 75,409sq m gross (50%) to 66,750sq m gross (44%)). The current proportion remains significantly higher than the national average (36%).

6.2.16 The fall in comparison goods units and floorspace is primarily as a result of the rise in the number of both retail and leisure service business. In particular, the Buttermarket Shopping Centre refurbishment/ redevelopment and the closure of the BHS store on Buttermarket has resulted in the loss of comparison goods retailers/floorspace.

6.2.17 Figure 6.3 shows that Ipswich Town Centre contains 26 of the 29 'major retailers' defined by Experian Goad. Experian consider these 'major retailers' to be key attractors and therefore most likely to improve the attraction of a centre for consumers. The 3 'major retailers' that are not present are John Lewis, House of Fraser and Next.

**Figure 6.3: Existing Major Retailers* in Ipswich Town Centre***

| Category | Retailers |
|---|---|
| Department | Marks & Spencer, Debenhams |
| Mixed Goods Retailers | Boots, TK Maxx, WH Smith, Wilkinson, Argos |
| Supermarkets | Sainsbury's, Tesco, Waitrose |
| Clothing | Burton, Dorothy Perkins, H&M, New Look, Primark, River Island, Topman, Topshop |
| Other Retailers | Carphone Warehouse, Clarks, Clintons, HMV, O2, Superdrug, Vodafone, Waterstones |

**As defined by Experian Goad*

6.2.18 Other notable national multiple retailers in the town centre beyond those defined as Major Retailers include, Pandora, Jack Wills, Swarovski, White Stuff, Argos, Cotswold Outdoor, Edinburgh Woollen Mill, Monsoon, Claire's Accessories, Accessorize, Blue Inc. and Joules.

6.2.19 The Council's 2010 Retail Study noted that at that time Ipswich Town Centre lacked a high quality department store and that there was significant potential to attract one to the town centre. The department store provision in the town centre remains unchanged since 2010. At the current time it is difficult to see one being attracted/opening in the town centre in the short to medium term. Following the opening of their Home store at Futura Park, John Lewis no longer has a requirement for a store in Ipswich. House of Fraser has also confirmed to us that they do not currently have a requirement for a new store in the town centre.

6.2.20 It is noted that since the 2010 Retail Study the town centre has lost national multiple retailers Next, Gap, TJ Hughes and Early Learning. However, since 2010 the centre has seen a number of new retailers including Jack Wills, Pandora, White Stuff, Trespass, Cotswold Outdoor, IStore, Regatta, Tiger, Paperchase, and B&M. It has also seen retailers relocating or refurbishing/extending within the centre including TK Maxx, Blue Inc, Clarks, JD Sports, Primark, New Look, and Top-Shop which provides evidence of retailer/investor confidence in the town centre.

6.2.21 In terms of higher brand national multiple comparison retailers, the town centre's offer is limited. The recent opening of high end retailers Jack Wills, Pandora and Joules provides some evidence that when an appropriately sized unit is available there is potential to be able to attract such retailers to the town centre.

6.2.22 The town centre provides a good range of specialist/independent retailers, primarily focused in 'The Saints' and the more secondary shopping streets. The proportion of comparison goods units occupied by independent retailers is 43% (89 units). Independent retailers/occupiers include outlets offering, *inter alia*, clothing and fashion, gifts and cards, textiles, picture framing and musical instruments. Overall, we consider there to be a good mix of national multiple and independent retailers.

6.2.23 The proportion of clothing and footwear units and floorspace (10% and 14% respectively) in the town centre are above the UK averages (8% and 9% respectively) which suggests the town centre generally provides a good clothing and footwear offer, albeit it mostly consists of a mid-range/value offer.

6.2.24 In terms of charity shops, the town centre unit provision is identical to the national average (3%) but in floorspace terms, primarily as a result of the Age UK unit on Carr Street (former Co-op department store), is above the national average (4% compared to 2%). The number of charity shops in the town centre is not considered to be of particular concern. With the exception of the Age UK unit, there are no other charity shops in key locations/large building which notably detract from the offer in the town centre. We understand that Age UK are on a short-term lease and that plans are evolving to redevelop the former Co-op department store for a new school. This would significantly reduce the proportion of floorspace in the town centre occupied by charity shops and help improve the environment in this part of the town centre.

6.2.25 In terms of the number and location of deep discount stores (such as B&M, Poundland and Poundworld), when compared to competing surrounding centres, Ipswich Town Centre contains a similar provision to that provided in Norwich and Colchester town centres but a greater provision than that provided in Bury St Edmunds Town Centre.

Retail Services

6.2.26 The provision of retail service outlets has increased since the 2010 Study from 75 to 91, in line with the trend seen nationally in this sector. These services now represent 14% of the total number of commercial outlets which is identical to the national average. The proportion of retail service floorspace has also increased in line with the national average (from 5-6%) albeit it is currently slightly below the national average (7%).

6.2.27 The majority of the services in the town centre are independent businesses, operating from small scale units. We consider that the overall retail service offer in the town centre is strong. In particular, hairdressers and beauty salons are provided in high numbers. Retail services commonly occupy units within St Nicholas Street, Fore Street/Upper Orwell Street where unit sizes are generally small in scale and lend themselves well to such uses. It is also noted that a number of retail services are also located on Carr Street including 2 optician national multiple operators (Specsavers and Co-op Optician) which are in larger sized units.

Financial and Business Services

6.2.28 The provision of financial and business services in the town centre has seen an increase over the past 7 years. The number of units has increased from 72 (11%) to 79 (12%) whilst the amount of floorspace has increased from 12,886sq m gross (9%) to 14,010sq m gross (9%) The proportion of financial and business services units and floorspace is slightly higher than the current national average (11% and 8% respectively).

6.2.29 In terms of distribution, there is a focus of financial and business services (primarily national banks/building societies and estate agents) around Cornhill, Princes Street and the Buttermarket. A number of further financial and business services are located in the vicinity of the Northgate Street/Carr Street junction supported by further businesses in the more secondary streets of the town centre (including in Crown Street and Falcon Street).

6.2.30 The provision of banks and building societies in the town centre is very good with the majority of the major banks/building societies present.

Leisure Services

6.2.31 As a proportion of total commercial units, leisure service outlets have increased from occupying 18% (115 units) to 20% (131 units) of the total units within the town centre. In floorspace terms the proportion of floorspace in leisure use has increased from 19% (28,886sq m gross) to 21% (31,290sq m gross). Whilst the level of leisure service floorspace remains below the UK averages (24% of units and 25% of floorspace), it should be noted that at the time of our survey (January 2017), the Buttermarket Shopping Centre was still undergoing redevelopment/refurbishment for leisure uses. Since the survey an additional number of food and drink units and the Empire Cinema have opened. A 12 lane bowling alley to be operated by Superbowl, a laser quest arena, ninja warrior course, amusement arcade and children's indoor soft play centre is also due to open later in the year. The development will significantly improve the leisure offer in the town centre with Buttermarket providing a number of good quality food and drink outlets including Wagamama, The Cosy Club, Prezzo, Coast to Coast, Revolution, Grape Tree and Byron Burger.

6.2.32 The proportion of town centre units in café/restaurant use is currently slightly below the UK average (8% compared to 9%) but, following the opening of all the food and drink outlets at the Buttermarket, will be closer, if not identical, to the UK average. As noted in Section 5 there are also a number of café/restaurants located along the Waterfront which further add to the provision of food and drink in the town centre.

6.2.33 In terms of bars/pubs in the town centre, the proportion of units and floorspace in the town centre is broadly comparable to the UK average (4% and 6% respectively). The pubs/bars, including Mannings public house, Arcade Tavern, Cock & Pye public house and the Eagle public house, are generally interspersed throughout the town centre. The provision of bars/pubs in the town centre is considered to be reasonably good. In terms of actual nightclubs, provision is more limited to facilities such as Sin and Falcon Club. However, a number of bars in the town centre, including the likes of Evolution, have late licences and provide a similar function to standalone nightclubs.

6.2.34 The proportion of fast food and takeaway outlets units in the town centre is half of the UK average (3% compared to 6%) suggesting there is an undersupply of such outlets in the town centre. This is not necessarily a bad thing as fast food and takeaway outlet can negatively impact on the environmental quality/appearance of a town centre.

6.2.35 The opening of the 14-screen Empire Cinema in the Buttermarket shopping centre has significantly improved the cinema provision in the town centre. The Ipswich Film Theatre, located at the Corn Exchange, also provides 2 screens, albeit screening is limited to between 2-4 showings a day. Before the opening of the Empire Cinema, the large multiplex Cineworld Cinema at Cardinal Park, located to the south west of the CSA, was the only mutliple cinema facility, in central Ipswich.

6.2.36 Hotel provision in the town centre is limited to the Novotel located on Grey Friars Road. However, following the grant of planning permission a 94 bed Easyhotel is due to open on Northgate Street in 2018. The Salthouse Harbour Hotel, Premier Inn Ipswich, and Duke Street Travelodge are located to the south of the town centre on/close to the Waterfront, providing additional centrally located hotel provision.

6.2.37 In terms of health and fitness facilities in the town centre, Profiles Gym within Crown Pool is located on Crown Street and PureGym has recently opened a new gym in the Buttermarket shopping centre. The town centre health and fitness facilities are also supported by Fore Street Swimming Pool located to the south east, between the CSA and the Waterfront, an Anytime Fitness gym located on the Waterfront and Better Gym at Russell Road.

6.2.38 Turning finally to ten-pin bowling alley provision in the town centre, at the current time, until the 12 lane ten-pin Superbowl bowling alley opens (due shortly) in the Buttermarket Shopping, there is no provision. We note that Bear's Boutique Bowling Bar and American Restaurant to the south of the town centre, off Star Lane, has recently closed. Other facilities outside the CSA are considered in Section 9.

Art & Cultural Facilities

6.2.39 As a major centre, Ipswich Town Centre also sustains good number of cultural facilities:

- Ipswich Regent Theatre, St Helen's Street (1,535 seats);
- New Wolsey Theatre, Civic Drive (400 seats);
- Corn Exchange (Grand Hall) (1,000 capacity);
- Ipswich Museum, High Street (to the north of town centre);
- Ipswich Art School (to the north of town centre);
- Wolsey Studio (104 seats) (to the north of town centre); and
- Christchurch Mansion & Wolsey Art Gallery, Soane Street (to the north of town centre).

6.2.40 The Waterfront itself is establishing itself as an important visitor attraction for the town. It also houses Dance East, which provides three dance studios, a 200 seat studio theatre and fitness suites. Orwell River Cruises Ltd (which provides round-trip cruises (for up to 118 people) to the Orwell Bridge, Pin Mill and Harwich Harbour) and Victor and Allen Gardiner River Cruises are also located at the Waterfront

6.2.41 Ipswich Town Centre also holds a number of art and cultural events in the year which attract visitors to the town centre including Ipswich Music Day, Martime Festival, the Gin Festival, Saints Beer & Folk Festival and Ipswich Fake Festival (Christchurch Park) which are all important in attracting additional visits to the town centre and increasing 'dwell time'.

## Vacancies

6.2.42 The number of vacant units within a centre can provide a good indication of how a town is performing. However, care should be taken when interpreting figures as vacant units will be found in even the strongest of town centres as it is to be expected that there is some 'churn' in the market with units changing representation. However, on other occasions properties may lay vacant because they are poorly maintained, unsuited to modern retailing requirements or are simply not being actively marketed. Conversely, a low vacancy rate does not necessarily guarantee that a centre is performing well. For example, if there is a proliferation of charity shops and other uses not usually associated with a town centre it may be a sign of decline, particularly where these uses are located in prime locations.

6.2.43 Many parts of Ipswich CSA have a limited vacancy rate, ensuring a vibrant environment across most of the prime retail pitch. However, our survey of January 2017 (of the town centre as defined by Experian Goad) identified approximately 20,884sq m of vacant floorspace across 96 units within the town centre. This equates to 15% of units and 14% of floorspace being vacant, which compares to respective national averages of 11% and 9%. Accordingly, both the proportion of vacant units and the proportion of vacant floorspace in Ipswich are above national average level.

**Figure 6.5: Vacancies in Ipswich Town Centre**

| 2009 | | | | | 2017 | | | | | UK Average % | |
|---|---|---|---|---|---|---|---|---|---|---|---|
| No. | % | Sq m | % | | No. | % | Sq m | % | | No. | Sq m |
| 85 | 14 | 18,934 | 13 | | 96 | 15 | 20,884 | 14 | | 11 | 9 |

*Source: Experian Goad Survey, September 2009 and November 2016 (updated by WYG January 2017)*
*UK average figure is at November 2016*
*% figures may not add due to rounding*

6.2.44 Between 2009 and 2017 the number of vacant units and floorspace has increased with the proportion of marginally increasing (from 14-15% and 13-14% respectively).

6.2.45 Whilst the overall vacancy rate does give some cause for concern, there are relatively few sizable vacant units on the principal shopping streets. Our survey of the town centre has found that the majority of vacant units in the town centre (73 (74%)) measure less than 200sq m gross. This suggests that there is an oversupply of small units within the town centre, particularly on the secondary shopping streets.

6.2.46 Of the 96 units vacant, only 6 are larger than 700sq m gross. These units are:

- the former BHS store, 36-42 Buttermarket;
- 1x ground floor food and drink unit, Buttermarket Shopping Centre
- the former Odeon Cinema, St Margaret's Street;
- the former Iceland store, 25-31 St Matthews Street.

6.2.47 As noted earlier, since our survey of the town centre a new 14 Screen Empire Cinema has opened and other units such as the Superbowl ten pin bowling alley will result in the upper floor vacant floorspace in The Buttermarket Shopping Centre coming back into use. We understand that, with the exception of one ground floor unit, all the newly created vacant A3 food and drink units in the shopping centre are now occupied.

6.2.48 In terms of the former Iceland store, St Matthew's Street, planning permission has recently been granted for the change of use of the unit from A1 to A3 (ref. 16/01051/FUL). We understand that the unit is due to be re-occupied by a buffet self-service style restaurant later this year.

6.2.49 To our knowledge, a viable use still remains to be agreed for the former BHS unit, with the building remaining a high profile vacant space in the town centre. Following the opening of the nearby Empire Cinema and further occupation of food and drink units at The Buttermarket Shopping Centre the unit is likely to become more attractive to potential occupiers. Indeed, we understand that applications (planning and listed building consent) have been submitted for the change of use of use and sub-division of the building into 2 A1 units, 3 A3 units, 1 A3/A4 unit and 1 D2 (gym) unit (application ref: 17/00765/FUL). Given the lack of large A1 retail units in the Primary Shopping Area (discussed further in Section 8 of this study) we consider that, where possible, large units such as the former BHS unit, should be retained for A1 use and not sub-divided into smaller units.

6.2.50 Our survey of the town centre found that, in the most part, the prime shopping locations within the Shopping Core Area (such as the Tavern Street, Cornhill, Western/central part of Westgate Street, Sailmakers Shopping Centre, and Buttermarket) experience a very low number of vacancies.

6.2.51 Within secondary shopping locations, the western end of Westgate Street shows indications of being a potential problem spot for vacancies. Our survey recorded that 7 of a total of 21 units. This represents a vacancy rate of 33%.

6.2.52 Other areas subject to particular concentrations of vacant units include Orwell Street/Tacket Street (7 vacancies), Queen Street (5 vacancies), and the southern end of Upper Orwell Street (5 vacancies). Princes Street, located just outside the CSA, also contains 6 vacant units.

6.2.53 In terms of take-up of vacant units, since 2009, 66 of the 85 units have been re-occupied. Of the 19 units that appear to have remained vacant since 2009 only 2 are located in the Primary Shopping Frontage Zone (PSFZ) (as defined in the Site Allocations & Policies (incorporating IP-One Area Action Plan) DPD, February 2017). These units are located at 20 Buttermarket and 2 Buttermarket Shopping Centre. Both units are small in size (120sq m and 80sq m gross respectively). This suggests that there is a good level of demand for units within the PSFZ and a good 'churn rate' of vacant units.

6.2.54 The distribution of vacant units within the town centre is identified by the plan of Ipswich Town Centre provided at **Appendix M**.

### Representation & Requirements

6.2.55 The retailer/leisure representation indicator is an important sign of the vitality and viability of a centre as it demonstrates the existing and potential future level of operators in the locality. We have reviewed the number of national and independent retailers/leisure operators which are present within Ipswich Town Centre, recognising that multiple retailers/leisure operators can act as anchor tenants in the centre and can add to its appeal and create additional pedestrian footfall.

6.2.56 The Venuescore 2015-16 UK Shopping Venue Rankings has also already been used to provide an indication of the retail hierarchy of Ipswich and other nearby centres, using a weighted scoring system which takes account of the presence in each location of multiple retailers. Venuescore's rankings identify Ipswich as being a key centre in the Eastern sub-region with a high street retail offer bettered only by Norwich and Cambridge.

6.2.57 The available evidence suggests that Ipswich Town Centre is performing reasonably well and, whilst it has lost national multiple retailers Next, BHS, and Gap over the past few years, it has gained retailers such Jack Wills, Pandora, an improved Primark and TK Maxx it continues to provide a good variety of both national and independent traders. As identified earlier, the town centre accommodates 26 of the 29 Experian Goad defined top comparison goods retailers. However, it is noted that a number of higher brand retailers are absent from the town centre such as Gant, All Saints, Cath Kidston, Ted Baker, Hobbs, Hollister, Jaeger, Jigsaw, French Connection, Karen Millen, Levi's, The White Company, Victoria's Secret, Mango, Apple (although there is an IStore in the town centre), Crew Clothing, Kurt Geiger, and Fred Perry.

6.2.58 In terms of food and drink uses, the town centre has seen a significant improvement in its offer following the opening of outlets in the Buttermarket Shopping Centre. Whilst the proportion of food and drink uses is broadly comparable to the national average, and there are a number of additional food and drink outlets along the Waterfront which further add to the provision of food and drink in the town centre, it is noted that there is still a number of national multiple occupiers that are not present in the town centre. We discuss these further in Section 8.

6.2.59 In assessing the health of centres, it is also relevant to consider which retailer/leisure operators may be intending to seek representation in Ipswich Town Centre in the future. Costar and 'The Requirements List' set out requirements for additional floorspace in particular town centres. It should be noted that each retailer/leisure operator will have particular size, layout and format requirements and that some operators may not have specifically identified town centre representation, instead targeting regions or even nationwide expansion. Whilst both Costar and 'The Requirements List' principally records the requirements of high street multiple operators, it is of relevance in identifying the type and broad number of operators currently seeking representation. Combined Costar and 'The Requirements List' identify (data of January 2017) a total of 32 retail and commercial leisure operators currently seeking premises in the town centre.

6.2.60 Figure 6.6 shows that there is good level of demand from a mix of retail and commercial leisure operators seeking representation in Ipswich Town Centre. Of particular note are the requirements from mid-range/higher brand operators Moda a Pelle, Slaters Menswear, Dr Martens, Pret a Manger, Five Guys, Joe's Kitchen, Doughocracy, and Village Hotel Club. We understand Pret a Manger are due to open by Christmas in a central location.

6.2.61 Figure 6.6 also shows that there is also a reasonably good level of demand for retail park/warehouse format floorspace.

**Figure 6.6: Registered Requirements, Ipswich**

| Name | Min Size (sq m) | Max Size (sq m) | | Name | Min Size (sq m) | Max Size (sq m) |
|---|---|---|---|---|---|---|
| **Retail/Services** | | | | **Leisure – Food & Drink** | | |
| Aldi | 1,700 | 1,900 | | Barburrito | 46 | 186 |
| Moda in Pelle | 56 | 139 | | Five Guys | 232 | 372 |
| Cycle Republic | 279 | 557 | | Pret a Manger | 56 | 279 |
| Hawkins Bazaar | 149 | 279 | | Miller and Carter | 372 | 929 |
| Pavers Shoes | 232 | 372 | | Creams Cafe | 158 | 325 |
| Fone World | 23 | 74 | | Second Cup | 93 | 139 |
| Steamer Trading Cookshop | 70 | 93 | | Hotcha | 93 | 186 |
| Linens Direct | 186 | 279 | | Joe's Kitchen | 279 | 372 |
| Lakeland (relocation) | 279 | 557 | | Doughocracy | 93 | 186 |
| Slaters Meanswear | 325 | 743 | | **Leisure - Other** | | |
| Cards Direct | 111 | 186 | | Luda (Online Bingo) | 232 | 465 |
| The Fragrance Shop | 19 | 139 | | Jump Arena | 1,394 | 3,252 |
| Dr Martens | 93 | 186 | | Funky Monkeys | 697 | 929 |
| iSmash | 19 | 46 | | Hollywood Bowl | 1,115 | 2,787 |
| Explore Learning | 111 | 232 | | **Hotel** | | |
| Metro Bank | 325 | | | Village Hotel Club | 5,574 | 8,361 |
| | | | | Easy Hotel | 1,394 | 3,716 |
| | | | | Travelodge | 929 | 3,716 |
| **Retail Park/Warehouse Format Requirements** | | | | | | |
| Halfords Autocentre | 325 | 557 | | Boundary Mill Stores | 9,290 | |
| Topps Tiles | 232 | 743 | | Toby Carvery | 372 | 929 |
| Better Bathrooms | 929 | 1,858 | | Green King Pubs | 465 | 929 |
| Formula One Autocentres | 409 | 650 | | Farmhouse Inns/Hungry Horse | 465 | 929 |
| Sofology | 929 | 1,394 | | McDonalds | 334 | |
| Middletons Furniture | 279 | 793 | | KFC | 167 | 325 |
| Bargain Booze Warehouse | 279 | 465 | | Selco Builders Warehouse | 2,787 | 3,716 |
| IN 'n' OUT (car service/MOT) | 334 | 557 | | | | |

*Source: Costar and 'The Requirements List', January 2017*

6.2.62 In addition to the above published requirements Next have also confirmed to us that they have a requirement to re-open a new 1,672-1,858 (18,000-20,000sq ft) two storey store in a prime pitch location in the town centre.

6.2.63 In terms of Hollywood Bowl's requirement, their agent has confirmed to us that following Superbowl being secured at the Buttermarket Shopping Centre they no longer have a requirement in Ipswich. We understand that Hollywood Bowl did consider the Buttermarket Shopping Centre but the available space could not meet their bowling lane requirements.

## Commercial Rents

6.2.64 The level of commercial rent which retail operators pay for presence in a town/city is an indication of the perceived strength of the centre. Bidwells, in their Autumn 2016 'View on Retail and Leisure in the East of England', set out the current and forecast Prime Zone A rents for the sub-regional centres in the East of England: Ipswich, Norwich, Chelmsford and Cambridge. Figure 6.7 below sets out the Prime Zone A rents for 2015 and 2016 and Bidwells forecasts to 2021.

**Figure 6.7: Prime Zone A Commercial Rents**

| | Prime Zone A (£/sq ft) | | | | | | | Annualised Growth Rate (%) |
|---|---|---|---|---|---|---|---|---|
| | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | |
| Ipswich | 110 | 110 | 110 | 115 | 115 | 120 | 120 | +2.0% |
| Norwich | 180 | 180 | 180 | 180 | 190 | 190 | 200 | +2.4% |
| Chelmsford | 185 | 185 | 185 | 195 | 195 | 200 | 200 | +1.7% |
| Cambridge | 290 | 290 | 290 | 290 | 290 | 300 | 300 | +0.8% |

*Source: Bidwells – Our View on High Street Retail - Autumn 2016*
*Notes: Our View on High Street Retail does not include rental data for Bury St Edmunds and Colchester*

6.2.65 Bidwells identify that Prime Zone A rents have stabilised across all centres following the period of growth in 2015, when rents were up by 9.3% on average. Ipswich's Prime Zone A rents is the lowest of the sub-regional centre's but is forecast to see annualised growth higher than Chelmsford and Cambridge.

6.2.66 In terms of other centres it has been reported that Prime Zone A rent achieved in Bury St Edmunds is £100/sq ft and in Colchester is £170/sq ft (2016).

6.2.67 Accordingly, with the exception of Bury St Edmunds, Ipswich Town Centre's Prime Zone A commercial rents are lower than all of the surrounding sub-regional centres and Colchester Town Centre.

## Pedestrian Flows

6.2.68 The latest pedestrian footfall count survey undertaken on behalf of Ipswich Borough Council was undertaken by NEMS Market Research in August 2013. A copy of the pedestrian footfall survey is attached at **Appendix N**.

6.2.69 The top 5 and bottom 5 locations for recorded footfall are set out in Figure 6.8 below.

**Figure 6.8: Town Centre Pedestrian Footfall Counts**

| Location | Total Count | Index |
|---|---|---|
| **Top 5** | | |
| 13 Cornhill (Lloyds Bank) | 1,527 | 100 |
| 20 Tavern Street (HMV) | 1,335 | 87 |
| 9 Tavern Street (i Store) | 1,224 | 80 |
| 5 Westgate Street (opposite Debenhams) | 1,217 | 80 |
| 46 Tavern Street (Poundworld) | 1,192 | 78 |
| **Bottom 5** | | |
| 3-5 St Nicholas Street (northern end) | 211 | 14 |
| Upper Brook Street (northern end) | 213 | 14 |
| 30 Silent Street (northern end) | 167 | 11 |
| 53 Fore Street (norther end) | 149 | 10 |
| 64 Upper Orwell Street (southern end) | 137 | 9 |
| St Peter's Street (southern end) | 76 | 5 |

*Source: NEMS Pedestrian Footfall Count Survey, August 2013*
*Total count is combined Wednesday and Saturday daytime counts*
*Excludes pedestrian counts outside the town centre (ie within the Waterfront area)*

6.2.70 The pedestrian footfall count survey shows that the greatest level of footfall was recorded in the principal shopping streets particularly in the vicinity of Cornhill, Tavern Street and the eastern end of Westgate Street. The lowest levels of footfall were recorded in the southern part of the centre along St Peter's Street, St Nicholas Street and Silent Street. Low levels of footfall were also recorded on the eastern periphery of the town centre along the secondary shopping streets of Upper Orwell Street and Fore Street.

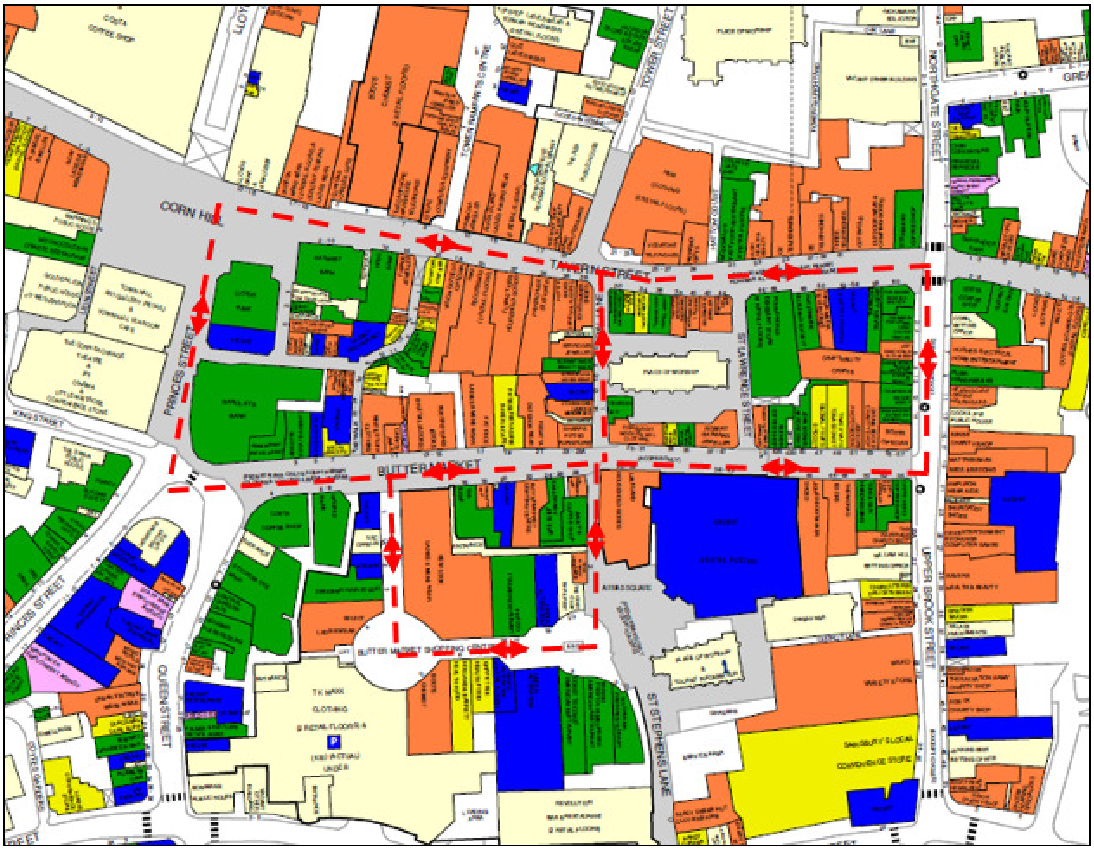
6.2.71 Our observations of pedestrian activity in the centre generally supports the footfall levels identified by the 2013 Survey. Strong levels of pedestrian activity were monitored along Cornhill, the east/middle part of Westgate Street and Tavern Street with good levels of footfall also monitored along the western part of Carr Street and Buttermarket. Reasonable levels of pedestrian footfall were monitored along the eastern end of Carr Street particularly around the Argos and B&M units. Footfall was also monitored to be reasonable, albeit slightly lower, at the western end of Westgate Street, with the greatest level of activity monitored in the vicinity of the Superdrug unit.

6.2.72 We are however surprised that the 2013 footfall count survey identifies that St Nicholas Street and St Peter's Street were both recorded to have one of the lowest levels of pedestrian activity in the town centre. Our observations do not support the footfall count data for this area where reasonable levels of footfall were observed. We also note that the Retail Study footfall count survey undertaken as part of the 2010 Retail Study does not support the 2013 Survey Findings in this respect. The reasons for this apparent anomaly aren't clear but potential reasons could be the weather or the time that the survey was undertaken.

6.2.73 In terms of the shopping centres in the town centre, good levels were observed within the ground floor of Sailmakers with lower levels monitored at first floor. Data provided by Completely Retail indicates that the shopping centre has an annual footfall of 6 million, which has increased by 10% from the year before. Turning to Buttermarket Shopping Centre, at the time of our visits only a number of the new food and drink outlets were trading. Following the opening of the cinema, bowling alley and remainder of the food and drink units the footfall in this part of the centre, particularly in the evening, is likely to see a significant uplift. The Buttermarket Shopping Centre leisure redevelopment should also have a positive 'knock on' effect on footfall along the Buttermarket and the wider shopping streets by way of encouraging linked shopping and leisure trips.

6.2.74 Figure 6.9 shows the main pedestrian circuits in the town centre. As a result of the east-west linear shape of the town centre main shopping streets circuits are reasonably limited. The main circuits were monitored to be between Buttermarket (and the shopping centre) and Tavern Street. The circuits are likely to be strengthened further with the redevelopment of the Buttermarket Shopping Centre.

**Figure 6.9: Main Pedestrian Circuits**




## Accessibility

6.2.75 The accessibility of a centre is determined by the ease and convenience of access by a choice of means of travel – including that which is provided to pedestrians, cyclists and disabled people – and the ease of access from the main arrival points to the principal attractions in the centre.

6.2.76 The town centre doesn't benefit from a single central public transport hub. Instead it provides two separate bus stations and a railway station a good walking distance to the south west of the CSA. The pedestrian linkage between the railway station and the town centre, whilst direct, would benefit from some environmental improvements and being more legible to help improve connectivity.

6.2.77 Ipswich Railway Station is located on the Great Eastern Main Line and provides frequent train services to London (Liverpool Street), Norwich and Cambridge. The current journey time to London is a circa 1 hour 10 minute (subject to number of stops). Abellio Greater Anglia, who were awarded a 9 year contract in 2016 to run the rail serves in the region, is committed to reducing this journey time to 1 hour by May 2019. New trains/carriages are also due to be introduced further improving the service to London.

6.2.78 Works have recently been completed to improve the accessibility of the station's forecourt for pedestrians and cyclists, buses and taxis. The new layout provides a safer environment for pedestrians, and improve traffic flow with new short-stay and drop-off parking for car drivers. The works have involved replacement traffic lights, road markings and crossings outside the station, new street lighting, new bus and taxi shelters and the paving and resurfacing of the forecourt.

6.2.79 The two bus stations are located at Tower Ramparts, located in the northern part of the centre, and Old Cattle Market, located in the southern part. Overall, despite the separate bus station provision, Ipswich Town Centre is considered to benefit from good accessibility by bus. A detailed route map of local bus services is provided at **Appendix O**.

6.2.80 The town centre also currently benefits from a free shuttle bus (Service 37) (operating between 31 July 2017 to 30 March 2018). The bus runs in a loop around the town centre every 15 minutes Monday – Friday between 11:30am and 2:30pm.

6.2.81 Ipswich also benefits from two park and ride sites. London Road Park and Ride is located in the south-western edge of Ipswich near the A12/A14 interchange and provides 500 parking spaces. Martlesham Park and Ride is located in the eastern fringe of Ipswich off the A12/A1214 interchange and also provides 550 car parking spaces.

6.2.82 In terms of accessibility by bicycle, the town centre is linked to the national cycle network with cycle parking facilities located throughout the town centre including at:

- Buttermarket / Upper Brook Street;
- Crown Pools (adjacent to William Street Short Stay Pay and Display car park);
- Elm Street (beside the Police Station);
- Lloyds Avenue (at the bottom of the hill);
- Old Cattle Market (at the end of the bus station);
- Old Foundry Road;

- Orwell Place (outside Church);
- Princes Street (adjacent to Giles statue area);
- Providence Street;
- Queen Street;
- Rail Station;
- St Peters Street;
- Tacket Street (adjacent to NCP car park entrance);
- Tower Ramparts;
- Tower Street;
- Upper Barclay Street Short Stay Pay and Display car park;
- Westgate Street; and
- Regent Theatre car park.

6.2.83 The town centre also provides a Shopmobility scheme which is located inside the Butermarket Shopping Centre. The Shopmobility scheme provides free hand-propelled and electric wheelchairs and electric scooters to help people who have limited mobility to shop and use other facilities in the town centre.

6.2.84 In terms of accessibility by car, Ipswich benefits from being located on the strategic A12 and A14 routes. The journey time from Ipswich to the M25 via the A12 is circa 1 hour.

6.2.85 A major planning application is due to be submitted in 2018 for three new bridges across the River Orwell (known as the 'The Upper Orwell Crossings'). The proposals involve:

- Crossing A - A new road crossing to the south of the Wet Dock which would connect the east and west banks. This will be wide enough to cater for larger vehicles, as well as pedestrians and cyclists.
- Crossing B - A new road crossing of the New Cut which would connect the west bank to the Wet Dock Island. This will enable the redevelopment of the Island Site and support wider regeneration.
- Crossing C - An improved cycle/pedestrian crossing over the Prince Philip Lock, which would connect the east bank to the Wet Dock Island.

6.2.86 We understand that the funding for the predicted £100m scheme costs comprises £77m from the Department of Transport and contributions from other local funding with £23m underwritten by Suffolk County Council. Subject to receiving planning permission, construction may start in 2019 with the bridges due to open in 2022. The new bridges, *inter alia*, would significantly improve access to the town centre and could lead to the remodelling of the Star Lane/College Street Gyratory. They will also enable the redevelopment of the Wet Dock Island and reduce congestion in Ipswich as well as improving cycling and pedestrian east to west access as well as allowing the movement of people to and through the Wet Dock Island. It has been estimated that regeneration of this area (including the Wet Dock Island) could result in additional economic benefits to the local economy of £6.5billion.

6.2.87 There are some 7,000 car parking spaces that serve Ipswich Town Centre. Approximately half of the spaces are operated by Ipswich Borough Council and NCP (approximately 1,900 and 1,800 spaces respectively). The car parks are supplemented by limited on-street parking spaces within the town centre. The main central car parks are set out in Figure 6.10 below.

**Figure 6.10: Main Central Car Parks in Ipswich Town Centre**

| Car Park Location | Spaces |
|---|---|
| Buttermarket Shopping Centre Car Park | 430 |
| Cox Lane Car park | 182 |
| Crown Car park | 236 |
| Foundation Street Car Park | 513 |
| The Spiral Car Park | 350 |
| Tower Ramparts Car Park | 114 |
| Tacket Street Car Park | 260 |
| Wolsey Car Park | 120 |
| William Street Car Park | 77 |
| Cromwell Square Car Park | 64 |
| Elm Street Car Park | 68 |
| Upper Barclay Street Car Park | 30 |
| West End Road Car Park | 329 |
| New Portman Road Car Park | 563 |

**As defined by Experian Goad*
*Notes: Planning permission granted for redevelopment of Crown Car Park for new multi storey to provide 546 spaces. Due to be complete by January 2018.*

6.2.88 It is noted that the NEMS household telephone survey and stakeholders feedback identified mixed views on whether there is sufficient car parking in Ipswich Town Centre. A Parking Strategy for Ipswich is currently being undertaken on behalf of the Borough Council to assess whether the provision of car parks in the town meets with current and future demand. The Strategy, being prepared by WYG, is due to be published later this year.

### Perception of Safety

6.2.89 Ipswich Town Centre benefits from a significant CCTV network. Cameras principally cover car parks, subways and the main shopping areas. Working with Ipswich Borough Council and Suffolk Police, Ipswich Central BID has been pivotal in helping to improve safety and reduce crime in the town centre. A number of initiatives have been developed:

- Street Rangers – The Street Rangers, equipped with 'body worn cameras', patrol the town centre and assist businesses and the police in tackling crime. The Rangers deal with anti-social behaviour and also provide assistance and information to members of the public within the town centre.
- Digital RadioLink – The radio system puts participating businesses in direct contact with the Street Rangers, the Police and CCTV.
- Child Safe – Wristbands containing information as to how youngsters can be reunited with parents if lost are available for families.
- Exclusion Scheme – Ipswich Central provides its radiolink users with a crime database system which allows Street Rangers to issue on the spot exclusion warnings and final notices of exclusion to repeat offenders. The database also allows the Street Rangers to monitor cleaning, street-scape and graffiti issues in the town centre alongside rough sleepers and other anti-social behaviour issues.
- Taxi Marshals – A scheme which is aimed to aid the reduction of violent crime once the pubs and clubs close their doors.

6.2.90 Ipswich is also the only town centre in Suffolk which has a Purple Flag accreditation for the management of its night time economy. Purple Flag is an accreditation scheme that recognises excellence in the management of town and city centres at night. Entertainment areas that achieve the standard will be those that offer "*a better night out*" to visitors. The town centre was first awarded Purple Flag status in July 2012, which has since been renewed.

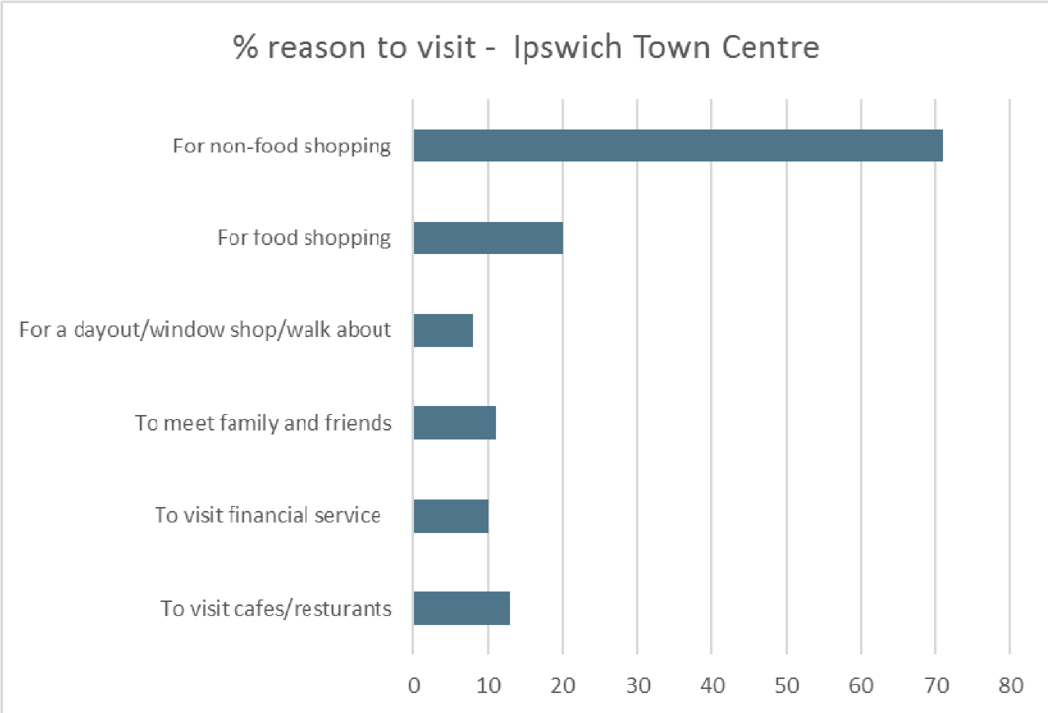
6.2.91 Overall, Ipswich Town Centre is perceived to be a safe town centre. No issues have been raised by key stakeholders or respondents in the NEMS survey in relation to safety in the town centre nor were improvements to town centre safety raised as a concern.

### Views and Behaviour

6.2.92 Utilising the NEMS survey we have been able to obtain information on the main reasons why respondents visit Ipswich Town Centre and what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

6.2.93 The main reason/s why respondents visit Ipswich Town Centre is shown below in Figure 6.11. As the graph highlights, the vast majority of respondents stated their main reason for visiting the town centre is for non-food shopping (71%). The second most popular reason for visiting the centre is for food shopping (20%). Other reasons include to visit café's/restaurants in the centre (13%), to meet family and friends (11%), and to visit financial services (10%).

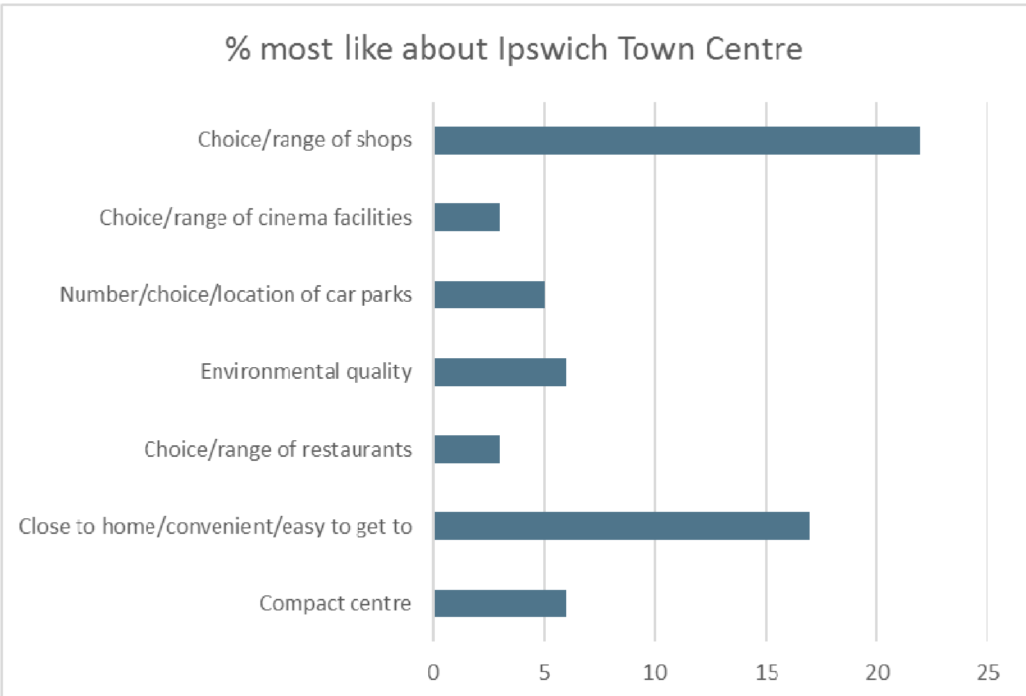
**Figure 6.11: Main Reason for Visiting Ipswich Town Centre**




*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

6.2.94 Figure 6.12 below shows what users of Ipswich Town Centre most like about the centre. It identifies that a large proportion of respondents like the choice and range of shops (22%) and the fact that the town centre was close to home/convenient (17%). Users also like the centre's environmental quality (6%), the compact nature of the centre (6%) and the number/choice/location of town centre car parks (5%).

**Figure 6.12: Main likes about Ipswich Town Centre**



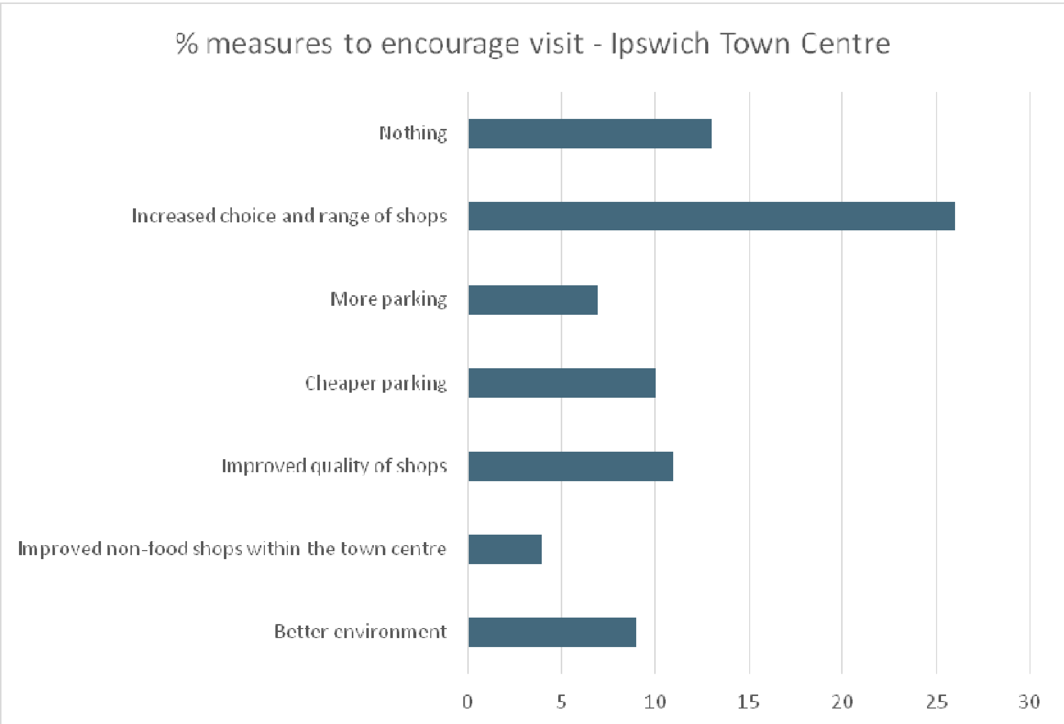

*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

6.2.95 Figure 6.13 identifies what measures would encourage users of Ipswich Town Centre to visit the centre more often. A large proportion of town centre users (30%) consider an increased choice and range of shops/improved non-food shops would encourage them to visit the centre more often. In terms of other measures the most popular suggestions are: improved quality of shops (11%); cheaper car parking (10%); more parking (7%), and; better environment (9%).

6.2.96 It is evident that there are mixed views on the environmental quality of the town centre and car parking provision. Whilst 9% of respondents identify that an improved/better town centre environment would encourage them to visit the centre more often, 6% of respondents identify the town centre environmental quality as one of the things they most like. In terms of parking we note that 5% of town centre users identify number/choice/location of car parks as one of their main likes of the town centre whilst 7% of users identify that more parking would encourage them to visit more often.

6.2.97 It is noted that 13% of users consider that nothing would encourage them to visit Ipswich Town Centre more often, suggesting that some users are satisfied with the town centre.

**Figure 6.13: Measures that would encourage visits to Ipswich Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 50% of respondents visited Ipswich Town Centre more than once a fortnight.*

6.2.98 Of those respondents in the NEMS survey that do not visit Ipswich Town Centre, a question was asked to establish their reasons for not visiting (Question 30a). A quarter of respondents indicated that they have no particular reason to visit the town centre and 17% identified that the town centre is too far away from home/work. It is noted that 17% do not visit the town centre because of its environmental quality; 14% because of its lack of choice and range of shops; 10% due to car parking being inconveniently located; and 8% due to car parking being expensive. The mixed opinions on town centre parking and environmental quality are further evidenced from this question.

6.2.99 It is noted that the most popular improvements identified by household telephone survey respondents of the 2010 Ipswich Retail Study are very similar to those measures identified in the NEMS survey. Two common themes arise when comparing the results of the two survey: parking and choice/range/quality of shops. The 2010 survey identified that 14% of respondents considered cheaper parking would make them visit the centre more often; 14% identified more/better parking; and 24% suggested more shops/larger shops/department store.

6.2.100 In terms of our engagement with key stakeholders a number of views on Ipswich Town Centre were raised. All views/feedback from key stakeholders are summarised in **Appendix C** of this study. A summary of the most common views is provided below:

- The Waterfront is becoming a key strength of Ipswich and popular destination to the benefit of the town centre.
- Positive recent development has taken place within the town centre, including the Buttermarket redevelopment and Sailmakers refurbishment.
- Some new quality retailers are locating within the town centre, including Jack Wills, supplemented by specialist retail provided at The Saints and The Lanes.
- There is a strong cultural offer provided through theatres, museums and cinema and a variety of different events.
- The market held on Tuesday, Thursday, Friday and Saturday attracts additional footfall, although could improve its retail offer.
- The current retail space is constrained and there is a lack of suitably sized stores within the centre to attract big national retailers.
- There is a lack of conference facilities/ large venue to host events within the town centre.
- The perception of the town is negative with a poor reputation which impacts on the town centre.
- The appearance of parts of the centre are in need of improvement to invigorate pride in the town centre. Also a number of vacant sites should be brought back into active use e.g. Co-op building, Cornhill, former Odeon.
- The multiple routes into the centre and odd road junctions can cause confusion for motorists, the layout can discourage people driving into the centre.

- There are a number of hotels located within the centre which suit varying budgets.
- The centre has ample and reasonably priced parking provision.
- Pedestrianised streets in the centre create a relaxed shopping environment.
- The profile of the town centre is beginning to improve, helped by the DMO, Ipswich Central BID, Ipswich Vision and the Council.
- The pedestrian link between the Waterfront and the town centre is not clear or defined at present.
- The redevelopment at the Waterfront needs to be completed. There is opportunity to provide greater leisure activities at the Waterfront to compliment the town centre offer.
- Competition from surrounding town centres, such as Colchester, Bury St Edmunds, and Norwich is a threat to the town centre.

6.2.101 Overall, there were a mix of views expressed by stakeholders on the strengths and weaknesses of Ipswich Town Centre. The Waterfront was the most frequently mentioned strength/opportunity. The majority of key stakeholders considered that it was important for the town centre and Waterfront to complement each other, work together to create one destination, and that the linkages between the two should be strengthened to encourage linked trips. Other suggestions of opportunities and ways to improve the town centre included:

- The provision of a new high end restaurant offer.
- Improvement to the town centre market.
- Improvement to 'wayfinding' and signage.
- The redevelopment of the Co-op building and Upper Orwell Street.
- Improvements to 'grot spots' in the centre eg. Upper Orwell Street.
- Conversion of former Post Office to provide improved food and drink offer.
- Improvement to the car parking offer in the town centre.

**Town Centre Environmental Quality**

6.2.102 The town centre's environmental quality varies across its CSA. The centre provides a mix of both historic (some of which date back to Tudor times) and modern buildings. The historic buildings and street pattern are of significant value to the town centre and make an important positive contribution to its environmental quality but the public realm areas do not currently provide the same level of quality. The town centre is covered by two conservation areas and includes some 500 listed buildings. The CSA would benefit from new higher quality paving, street furniture and soft landscaping. The provision of new public realm would help provide a 'sense of place', compliment the historic buildings in the centre, and provide a quality of environment shoppers and visitors have come to expect in town centres. This is recognised by the Council and a Public Realm SPD is in preparation. An attractive town centre environment and the creation of a 'sense of place' is one of a number of key factors that influence retailers, leisure operators to invest in opening new premises in the town.

6.2.103 The Cornhill is due to be redeveloped next year providing a high quality public realm together with street furniture, a water fountain and a sculpture. The redevelopment scheme is being funded by New Anglia Local Enterprise Partnership, Ipswich Borough Council, and Suffolk County Council. The objective of the redevelopment is to significantly enhance the environmental quality of this important central part of the town centre and help fill vacant space around Cornhill to make it a destination location.

6.2.104 The two shopping centres in the town centre have also seen significant investment in recent years. The Sailmakers, which is anchored by Poundland and Iceland, has recently undergone a major £4m refurbishment which has significantly improved its appearance and shopping experience. The Buttermarket Shopping Centre has also seen a significant £35m leisure refurbishment/redevelopment.

6.2.105 The pedestrianisation area of the town has recently been extended along Queen Street with additional pedestrianisation works along St Nicholas Street completed in June 2017. The environmental quality of this part of the town centre has been/will be improved as a result of these works and will help strengthen pedestrian linkages between Cornhill and the Waterfront.

6.2.106 In terms of the secondary shopping streets, the environmental quality of the eastern end of Carr Street and St Matthew Street is in part impacted by vacant units and would also benefit from public realm improvements. The environmental quality of other secondary shopping streets is mixed with the quality of environment in Upper Orwell Street being particularly poor and The Saints speciality/independent area providing a pleasant environment.

6.2.107 In terms of cleanliness, overall there was little evidence of litter and graffiti within the town centre. We understand that the maintenance and cleaning of the centre is assisted by funding from Ipswich Central BID.

6.2.108 Turning to signage and mapping in the town centre, Ipswich Borough Council completed the 'Ipswich Wayfinding Scheme' in 2014. The scheme links the various areas of the town and waterfront via a system of monoliths, finger signboards, maps and mapping. The implementation of the scheme has significantly improved the legibility of the town centre and is likely to have helped increase pedestrian linkages between the town centre and the Waterfront.

### SWOT Assessment

6.2.109 Overall, despite the significant level of out-of-centre retail and leisure floorspace, Ipswich Town Centre is performing reasonably well and is considered to display reasonably good levels of vitality and viability.

6.2.110 Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows.

- **Strengths and Opportunities**
  - The town centre is performing reasonably well and continues to provide a good variety of both national and independent traders.
  - The town centre accommodates 26 of the 29 Experian Goad defined top comparison goods retailers.
  - There is there is good level of demand from a mix of national multiple retail and commercial leisure operators seeking representation in the town.
  - The centre has seen significant recent investment at The Buttermarket and Sailmakers shopping centres.
  - The retail service offer in the town centre is considered to be strong.
  - There is a reasonably good provision of pubs/bars.
  - The town centre sustains a good number of arts and culture facilities.
  - Generally, the accessibility of the town centre is considered to be good with vehicular access to be improved following the development of 'The Upper Orwell Crossings'.
  - Health and fitness provision in the town centre is considered to be reasonably good.
  - The town centre, benefiting from a number of active initiatives to improve safety and reduce crime, is considered to be safe.
  - The Cornhill redevelopment will significantly improve the central area of the town centre.
  - Improvements to the linkages and relationship with the Waterfront are key to encouraging linked trips and spin-off benefits for each.
  - The leisure offer of the town centre has significantly improved following the opening of the cinema and food and drink units in the Buttermarket Shopping Centre.
  - Evident from the recent investment at both shopping centres (and the sale of Buttermarket Shopping Centre) there is strong investor confidence in the town centre.
  - The former Co-op building, Carr Street (currently occupied by Age UK), which has funding for a Free School, provides an important opportunity for refurbishment/redevelopment.
  - The Crown Car Park and its redevelopment is a key opportunity to improve car parking provision in the town centre
  - Central Ipswich BID, DMO, Ipswich Vision, New Anglia LEP, Ipswich Borough Council and Suffolk County Council are important/key stakeholders which have helped deliver improvements/investment over recent years. These stakeholders will play an important role in enabling further improvement/investment in the town centre.

- **Weaknesses and Threats**
  - There is a high vacancy level in the town centre (albeit the majority of units are small in size).
  - The town centre lacks in higher brand (premium) comparison goods retailers.
  - There is a lack of available units/sites in the prime shopping area capable of meeting national multiple occupiers' requirements for large floorplate units.
  - The pedestrian linkage between the railway station and the town centre is considered to be weak.
  - The prominent former BHS unit and former Odeon cinema buildings remain vacant.
  - The former Co-op building, and its short term letting to a charity retailer, does not positively contribute to the health of the town centre.
  - The town centre lacks a foodstore facility capable of being able to offer a full main-food shop.
  - Whilst significantly improved recently, there are still a number of national food and drink operators not present in the town centre.
  - The centre lacks a high-quality department store.
  - Whilst the historic buildings make an important positive contribution to town centre, environmental quality the public realm areas do not provide the same level of quality.
  - Further out-of-centre retail and leisure development is a continued threat to the town centre and further development could potentially result in the relocation of town centre retailers and negatively impact on the town centre.

6.2.111 Ipswich Town Centre has seen a good level of investment in recent years but so have other competing surrounding centres, most notably Bury St Edmunds. The town centre remains the 3rd strongest centre in the region and whilst ranked behind the larger centres of Norwich and Cambridge remains higher than Colchester, Chelmsford and Bury St Edmunds. It is vital that the centre continues to see investment and evolves to ensure it remains competitive and not lose out to competing centres.

## 6.3 District Centres

6.3.1 We have examined the health of the 11 district centres within Ipswich. The district centres within Ipswich are broadly distributed across the built up area surrounding the town centre. A plan showing the spatial distribution of the existing district centres (and local centres) in the Ipswich authority area is contained at **Appendix F**.

6.3.2 Vitality and viability health check assessments for the 11 district centres are provided at **Appendix G**. Given the nature and scale of these centres, there is limited published information and our analysis therefore draws largely on data from own site visits carried out in January/February 2017.

6.3.3 Figure 6.14 below sets out the composition of the district centres in terms of the number of units by retail/leisure category.

**Figure 6.14: District Centre Unit Composition (No.)**

| District Centre | Conv (Food) | Comp (Non-Food) | Retail Service | Leisure Service | Finance Service | Other | Vacant | Total |
|---|---|---|---|---|---|---|---|---|
| Meredith Road | 5 | 2 | 3 | 6 | 0 | 1 | 0 | 17 |
| Norwich Road | 11 | 13 | 13 | 12 | 1 | 0 | 10 | 60 |
| Hawthorn Drive | 4 | 4 | 2 | 4 | 0 | 2 | 0 | 16 |
| Stoke Park Drive | 2 | 1 | 0 | 1 | 0 | 2 | 0 | 6 |
| Wherstead Road | 5 | 2 | 3 | 7 | 1 | 0 | 1 | 19 |
| Woodbridge Rd | 6 | 7 | 9 | 8 | 2 | 0 | 2 | 34 |
| Woodbridge Rd East | 3 | 4 | 3 | 2 | 1 | 0 | 1 | 14 |
| Felixstowe Road | 6 | 11 | 12 | 8 | 3 | 2 | 4 | 46 |
| Nacton Road | 5 | 9 | 7 | 9 | 3 | 3 | 2 | 38 |
| Ravenswood | 2 | 3 | 1 | 6 | 1 | 2 | 0 | 15 |
| Duke Street | 4 | 3 | 2 | 11 | 4 | 0 | 8 | 32 |

*Source: Appendix G*

6.3.4 Figure 6.14 shows that the largest district centres, in terms of number of units, are Norwich Road (60 units) and Felixstowe Road (46 units). Both centres provide a larger proportion of comparison goods and retail services relative to other district centres. Whilst the smallest district centre in the Borough, in terms of number of units, is Stoke Park Drive, in floorspace terms, due to the centre being anchored by a large Asda foodstore, it is the largest centre.

6.3.5 All the district centres in the Borough are, in part, anchored by a foodstore/convenience store. The Aldi store at Meredith Road; Asda, Stoke Park Drive; Aldi and Co-op at Felixstowe Road; and Lidl and Co-op at Ravenswood all significantly contribute to the vitality and viability of those centres.

6.3.6 Our health check assessments have found that all display reasonable or good levels of vitality and viability. Of particular note, are the very low (or in some cases nil) vacancy level present in a number of the district centres (9 of the 11 centres). Notwithstanding this, the health check assessments did however identify the following:

- With the exception of Woodbridge Road, Ravenswood, and Felixstowe Road district centres, there are no financial banking services within the district centres. The majority do however provide ATM facilities.
- Whilst we consider the vitality and viability of the Wherstead Road District Centre is reasonable against the relevant vitality and viability indictors its health would benefit from some enhancements to its environment and improvements to shop/service fronts.
- One sixth of the units in Norwich Road District Centre are currently vacant. However, the units are small and interspersed throughout the centre.
- Duke Street District Centre also contains a reasonably high number of vacant units. We understand that since our survey all the units, with the exception of 2, are now occupied.

- Whilst Woodbridge Road/Cauldwell Hall Road District Centre is considered to be healthy due to residential properties being interspersed between retail/service units the extent/definition of the centre is not particularly clear. The western part of Felixstowe Road District Centre and the northern Nacton Road District Centre also have similar issues.

6.3.7 Overall, with the exception of Felixstowe Road, Ravenswood, Meredith Road, and Stoke Park district centres, the majority of centres meet 'day to day' shopping/service needs of their local communities. However, it is apparent that Felixstowe Road, Stoke Park Drive, Meredith Road and Ravenswood district centres, due to their foodstore provision, serve wider catchment areas beyond their immediate residential areas.

6.3.8 We consider the district centres in the Borough continue to serve a complimentary role to Ipswich Town Centre and are each performing the role of a district centre. We do not consider that any of the Borough's district centres require substantial retail or leisure development in order to improve their vitality and viability.

# 7.0 Qualitative Assessment - Suffolk Coastal Town Centre Health Checks

## 7.1 Introduction

7.1.1 This section of the study provides vitality and viability health check assessments of the 6 town centres within the Suffolk Coastal district: Woodbridge, Felixstowe, Saxmundham, Framlingham, Leiston, and Aldeburgh.

7.1.2 The health check assessments are based on the NPPG vitality and viability indicators as previously set out in paragraph 6.1.2 of Section 6. Most notably:

- Diversity of uses;
- Proportion of vacant street level property;
- Retailer representation;
- Pedestrian flows;
- Accessibility;
- Perceptions of safety and occurrence of crime;
- Views and behaviour; and
- State of town centre environmental quality.

7.1.3 It should be noted, primarily due to the size of the centres in Suffolk Coastal district, there is currently no publicly available Prime Zone A commercial rental data for the town centres.

7.1.4 Surveys of each relevant town centre within the district were undertaken by WYG in January/February 2017. The surveys are all based on the Experian Goad boundary area for each town centre. As noted in Section 6, the use of the Goad boundary is helpful in allowing data on the occupation of units to be 'benchmarked' with national average Goad data. We have also had particular regard to the proliferation of vacant land and premises and the opportunities that may exist for future growth in each centre. A plan showing the spatial distribution of the town centres in the district authority area, and their location relative to Ipswich Town Centre, is contained at **Appendix H**.

7.1.5 In accordance with the commission a health check assessment of Wickham Market District Centre has also been undertaken. Primarily due to the size of the centre there is no Experian Goad data for this centre. Accordingly, our assessment is based on our own survey of the centre undertaken in January/February 2017.

7.1.6 As part of our assessment we have also reviewed the previous Retail Study for the Suffolk Coastal prepared by CBRE in 2008 and where relevant compare its conclusions with our findings. It should however be noted that the 2008 Study excludes an assessment of leisure uses/provision and therefore does not provide as detailed breakdown of the composition and floorspace of the town centres as this study. Accordingly, it has not been possible to directly compare the current town centre composition/floorspace with the composition/floorspace set out in 2008 Study. We have therefore compared the current floorspace/composition figures of the town centres to figures we have obtained from Experian Goad for the year 2015.

7.1.7 Our town centre vitality and viability health checks are set out in turn below. We assess the two largest centres of Woodbridge and Felixstowe first before analysing the smaller centres of Saxmundham, Framlingham, Leiston and Aldeburgh.

## 7.2 Woodbridge Town Centre

7.2.1 Woodbridge is situated approximately 9 miles to the north east of Ipswich. The town, which has a population of some 8,000, is sandwiched between the A12 to the north and River Deben to the South. Woodbridge lies adjacent to the Suffolk Coast and Heaths Area of Outstanding Natural Beauty with its town centre located in a designated conservation area.

7.2.2 Woodbridge Town Centre is the second largest town centre in the Suffolk Coastal District (by number of units and commercial floorspace). The town centre, comprising 191 units totalling 30,860sq m gross floorspace, follows the historic street pattern and runs east to west along the Thoroughfare and north to south from Market Hill down Church Street and Quay Street.

7.2.3 The Town Centre Boundary and Primary Shopping Area are identified within the 2001 Local Plan Proposals Map. The Town Centre boundary starts at the edge of St Johns Street and encompasses the town running along New Street to the north and encircles units on Market Hill down Church Street and Quay Street to Quayside then around the Co-Op Supermarket and behind the retail units along the Throughfare to Quay Road. The current Prime Shopping Area (PSA) runs along the Thoroughfare and in the vicinity of the Co-Op foodstore.

7.2.4 The town centre boundary and PSA were due to be reviewed within Woodbridge Neighbourhood Plan although work on this has since ceased. As such, the 2001 Proposals Map contains the current boundaries.

### Diversity of Uses & Representation

7.2.5 We have reviewed the diversity of retail and service uses accommodated in the town centre and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix P**.

7.2.6 Figure 7.1 and Figure 7.2 below compare the current composition of retail and leisure commercial units and floorspace within the town centre to Experian Goad Survey records from November 2015.

**Figure 7.1 Woodbridge Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 15 | 8 | 14 | 7 | 9 |
| Comparison | 91 | 49 | 95 | 50 | 32 |
| Retail Service | 25 | 14 | 24 | 13 | 14 |
| Leisure Service | 27 | 15 | 29 | 15 | 24 |
| Financial & Business Service | 25 | 13 | 24 | 13 | 11 |
| Vacant | 2 | 1 | 4 | 2 | 11 |
| **Total** | **185** | **100** | **191** | **100** | **100** |

*Source: Experian Goad Survey, November 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

**Figure 7.2 Woodbridge Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 2,340 | 7 | 2,100 | 7 | 16 |
| Comparison | 16,430 | 52 | 17,000 | 55 | 36 |
| Retail Service | 2,190 | 7 | 1,990 | 6 | 7 |
| Leisure Service | 5,100 | 16 | 5,260 | 17 | 25 |
| Financial & Business Service | 3,810 | 12 | 3,670 | 12 | 8 |
| Vacant | 1,520 | 5 | 700 | 2 | 9 |
| **Total** | **31,390** | **100** | **30,860** | **100** | **100** |

*Source: Experian Goad Survey, November 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

7.2.7 In addition to retail and leisure services/facilities the town centre also contains residential, offices, Woodbridge St Mary Church, Woodbridge Quay School, The Abbey School and Woodbridge Library.

Convenience Goods

7.2.8 The town centre provides a total of 14 convenience goods units with a combined floorspace of 2,100sq m. The Co-op foodstore in the Turban Centre provides the main food retail offer (980sq m gross floorspace). The Co-op is supplemented by two bakeries, a butcher, greengrocer, fishmonger, three delicatessens, two health food stores and one convenience store. The majority of these small stores are operated by independent retailers with elements of their produce are niche and interesting (eg: artisan bread at the bakery, a wide range of fish at the fishmongers). In addition to the Co-op other national multiples include Holland and Barrett, Cook and McColl's.

7.2.9 Whilst convenience goods unit numbers and floorspace have remained largely unchanged since 2015 the town centre has seen the relocation of the Co-op store on the Thoroughfare to the former Budgens store in the Turban Centre. The current proportion of convenience goods units is slightly below the UK average and in floorspace terms is significantly below the UK average. Planning permission has recently been granted for external alterations to improve the appearance of the Co-op food store.

7.2.10 Additional local convenience provision is also available at a market held every Thursday at Hamblin Road Car Park offering produce including fresh bakery goods, fish, cheese, pies and plants. In addition, a further market, 'Woodbridge Farmers Market', is held twice a month, at Woodbridge Community Hall located to the south of the town centre approximately 135m.

Comparison Goods

7.2.11 Woodbridge's comparison goods sector is provided in 95 units encompassing 17,000sq m gross floorspace. Overall comparison unit and floorspace provision in the centre has remained largely unchanged since 2015 (+4 units and +570sq m gross respectively). In the period since 2015, 6 new comparison goods retailers, including Joules, have opened premises in the town whilst just 2 have closed. The current proportion of comparison goods units in the centre (both in terms of number of units and floorspace) is significantly higher than the national average.

7.2.12 In terms of the breakdown of units, just under a third (31 units) are clothing, footwear and jewellery retailers. There is also a number of antiques, furniture and interior decorations stores (16 units), the majority of which are local/independent operators, although multiple retailer Laura Ashley is present. The town also contains 7 charity shops, 6 gift stores, 2 bookshops, 4 opticians, 2 chemists and a florist.

7.2.13 The town centre provides a reasonably good mix of national multiples (75%) and independent/specialist retailers (25%). National multiple retailers are located along the Thoroughfare and include Boots, WH Smith, Joules, Fat Face, Seasalt, Peacocks, Savers, Card Factory, Lloyds Pharmacy, Specsavers, Rohan Outdoor wear, and M&Co clothing.

7.2.14 It is noted that there are a number of retailers/services, including Fat Face, Peacocks, Boots, WHSmith, Card Factory and Prezzo, that are present in both Woodbridge and Ipswich Town Centre. This indicates that operators generally consider the centres not to be in competition with each other. National multiple retailers present in Woodbridge Town Centre and not Ipswich Town Centre include Seasalt and Rohan.

Retail Services

7.2.15 The retail services within the town centre are dominated by hair and beauty facilities, with some 16 of the 24 units (66%) occupied by such facilities. In addition, the centre offers a dry cleaner, 3 travel agents, tattooist, health club, health therapy and a post office (within the Co-Op).

7.2.16 The current proportion of retail services in the centre, both in unit numbers and floorspace terms, is comparable to the UK average.

Financial & Business Services

7.2.17 The financial and business services sector has remained broadly unchanged since November 2015. The sector has seen a reduction in just one unit (from 25 to 24 units). The proportion of financial and business services, both in unit number and floorspace terms, is above the national average figures implying Woodbridge has a strong financial and business offer to the benefit of the local populous.

7.2.18 The sector includes four banks (Natwest, Barclays, HSBC and Lloyds) together with two building societies (Ipswich Building Society and Yorkshire Building Society). Also provided in the centre are 9 estate agents, 4 solicitors, 4 financial advisors, and a Job Centre Plus.

Leisure Services

7.2.19 In terms of leisure services, Woodbridge Town Centre provides some 5,260sq m floorspace within 29 units. This is primarily in the form of cafes, coffee shops and restaurant facilities supplemented by public houses and social clubs. There are also two hotels (The Crown and The Bull) and one guest house (Hill House Hall).

7.2.20 The leisure service operators are generally independent (79%), although national multiple operators include Prezzo, Costa Coffee and Caffe Nero. When compared to the national average, leisure services within Woodbridge are below the national average, by floorspace and unit numbers, between 8% and 9% respectively.

7.2.21 There is also a cinema located to the south of the town approximately 160m walking distance from the Throughfare within the Riverside Restaurant and Theatre. The Riverside contains a restaurant and bar alongside a cinema/ theatre. There are up to 3 screenings per day of many current blockbuster films and also live screenings of ballet and opera performances.

7.2.22 Deben Swimming Pool is also located to the south of the town adjacent to Woodbridge Railway Station. In addition to the swimming pool there is a gym/sauna. A number of workout/fitness classes are also provided.

Art & Cultural Facilities

7.2.23 The main art/cultural facility in Woodbridge is The Riverside Restaurant and Theatre which hosts a programme of theatre related events titled 'Riverside Nights', a thriving film club and Michelin listed restaurant. Other cultural facilities in Woodbridge Town Centre include St Mary's Church and Woodbridge Museum both on Market Hill. In addition, the Tide Mill Living Museum located to the south of the town is open throughout the season and provides guided tours. Buttrums Windmill is located to the north of the town and has open days throughout the summer months for visitors.

7.2.24 National Trust site Sutton Hoo is located to the east of Woodbridge within the Suffolk Coast and Heaths AONB. It offers archaeological discoveries and ancient burial grounds alongside an exhibition and Edwardian property for visitors to explore. We understand that it has recently received a £1.8m lottery grant towards the £4m "Releasing the Story of Sutton Hoo" project to enhance the visitor experience and transform it into a wold heritage attraction.

### Vacancies

7.2.25 The town centre currently contains just 4 vacant units occupying just 700sq m floorspace. The current proportion, both in terms of unit numbers and floorspace, is significantly below the national average.

7.2.26 Two of the vacant units are located along the Thoroughfare at no's 27 (former Co-op store) and 24, each with 160sq m floorspace. Of the remaining vacant units, one is located along Quay Street (240sq m) and the other fronting Market Hill off Church Street (140sq m).

7.2.27 Whilst the number of vacant units has increased from 2 to 4 since 2015, none of units that were vacant in 2015 remain vacant. This demonstrates that there is a very good 'churn rate' of vacant units and a good level of demand from operators.

7.2.28 The low levels of vacant units and good 'churn rate' are a clear indicator that the town centre is attractive and vital and viable.

### Retailer & Leisure Requirements

7.2.29 In assessing the health of centres, it is also relevant to consider which retailers may be intending to seek representation in Woodbridge Town Centre in the future. Costar and 'The Requirements List' set out requirements for additional floorspace in particular town centre, including Woodbridge. Combined Costar and 'The Requirements List' identify a total of 11 retail and commercial leisure operators currently seeking premises in the town centre.

**Figure 7.3: Registered Requirements, Woodbridge**

| Name | Minimum Size (sq m) | Maximum Size (sq m) |
|---|---|---|
| Aldi | 420 | 1,440 |
| Holland and Barrett | 92 | 650 |
| Jigsaw | 37 | 92 |
| Mind | 79 | 140 |
| Clintons | 185 | 278 |
| Cats Protection | 46 | 185 |
| The Works Stores | 92 | 232 |
| Vets 4 Pets | 111 | 232 |
| Premier Inn | 2,322 | 3,716 |
| McDonald's | 334 | - |
| Marstons | 464 | 836 |

*Source: Costar and 'The Requirements List'*

7.2.30 Figure 7.3 shows that for a town the size of Woodbridge there is reasonably good demand from retail and commercial leisure operators seeking representation. The demand is, in part, supported by very limited number of vacant units in the town centre and the good 'churn' rate.

### Pedestrian Flows

7.2.31 There is currently no footfall/pedestrian count data available for Woodbridge Town Centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall across Woodbridge Town Centre.

7.2.32 The greatest levels of pedestrian traffic was evident along the Thoroughfare and in the Turban Centre in the vicinity of the Co-op foodstore and car parks off Hamblin Road. Outside of the main shopping/service street area lower levels of footfall were monitored along Quay Street with moderate levels observed at Market Hill and along Church Street. The levels of pedestrian activity outside the main shopping/service do not raise cause for concern.

7.2.33 Given Woodbridge is a popular visitor destination, pedestrian activity in the summer season will be greater, particularly along Church Street.

### Accessibility

7.2.34 The centre is considered to be accessible by a range of transport modes including public bus and rail services. Woodbridge railway station is located 120 metres walking distance to the south of the town centre providing services to Lowestoft, Melton, Halesworth, Saxmundham, and Ipswich.

7.2.35 The town benefits from a number of bus stops, many of which are located on Quay Street as well as outside the Co-Op at the Turban Centre and on St Johns Street to the north of the town. Services are provided to a number of destinations including Ipswich and surrounding towns, Orford, Melton, Saxmundham and Leiston as well as visitor attractions such as Sutton Hoo.

7.2.36 Car parking provision in the centre is principally provided at the following surface level pay and display car parks:

- Hamblin Road (225 spaces)
- Brook Street (30 spaces)
- Oak Lane/ New Street (70 spaces)
- Theatre Street (25 spaces)
- Railway Station (72 spaces)

7.2.37 The car parks off Hamblin Road were monitored to be particularly well used at the time of our visits.

**Perception of Safety**

7.2.38 The town centre benefits from CCTV installed at Market Hill and the Thoroughfare. Woodbridge Town Centre also has a Town Pastor scheme since 2010, which seeks to provide a positive presence on the town centre. Town Pastors are Christian volunteers from local churches who patrol the town centres on Friday and Saturday nights. The scheme includes trained volunteers who look out for and support vulnerable people, defuse potentially aggressive situations and encourage safe behaviour.

7.2.39 Woodbridge Town Centre is generally perceived to be a safe. Indeed, it is noted that no issues have been raised by key stakeholders or respondents in the NEMS survey in relation to safety in the town centre nor were improvements to town centre safety raised as a concern.

**Views and Behaviour**

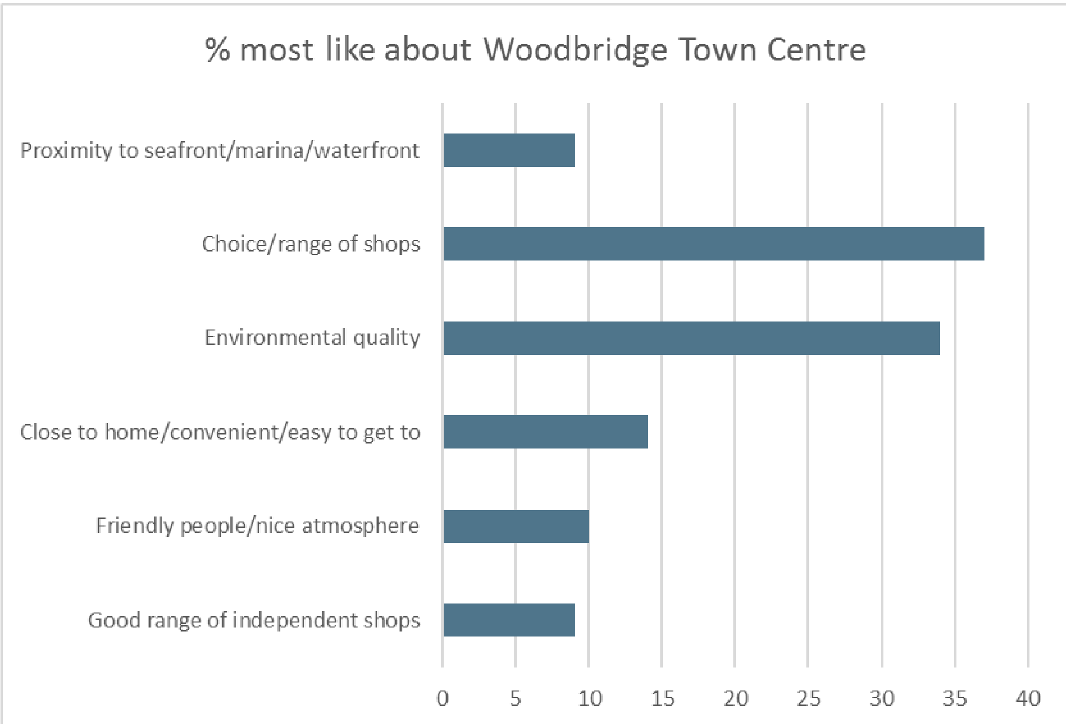
7.2.40 Utilising the NEMS survey we have been able to obtain information on the main reasons why respondents visit Woodbridge Town Centre, what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

7.2.41 Figure 7.4 below identifies that the main reason/s why respondents visit Woodbridge Town Centre is for non-food shopping (58%) and food shopping (36%). Some 29% of respondents identified the main reason/s to visit the town centre was to visit cafes/restaurants with 17% meeting family and friends.

**Figure 7.4: Main Reason for Visiting Woodbridge Town Centre**


*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

**Figure 7.5: Main likes about Woodbridge Town Centre**




*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.2.42 Figure 7.5 shows what users of Woodbridge Town Centre most like about the centre. It shows that a large proportion of respondents like the choice and range of shops (37%) and the town centre's environmental quality (34%). Respondents also like the fact that it was close to home/convenience/easy to get to (14%), the town centre provided a nice atmosphere/had friendly people (10%) and the centre had a good range of independent shops (9%).

7.2.43 Figure 7.6 identifies what measures would encourage users of Woodbridge Town Centre to visit the centre more often. It shows that the majority of respondents (58%) consider no measures would encourage them to visit more often suggesting that they are satisfied with the town centre. Of the measures suggested by respondents the most common ones are: increased choice and range of shops (9%); improved leisure facilities (6%); more parking (6%); and cheaper parking (6%).

**Figure 7.6: Measures that would encourage visits to Woodbridge Town Centre more often**


*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 60% of respondents visited the town centre more than once a fortnight.*

7.2.44 In terms of our engagement with key stakeholders, a number of views on Woodbridge Town Centre were identified. These include:

- There is a good specialist retail offer.
- The centre provides a good mix of independent/national multiple shops.
- The centre has a pleasant atmosphere.
- There is ample car parking.
- There are strong independent hotels but lack of national multiple hotels.
- The centre offers lots of reasons to visit.

- Good eating and drinking facilities.
- There is limited potential for physical growth.
- The size of the centre is compact.
- The shops do not attract all demographics.
- The theatre/cinema on waterfront.
- The train station is centrally located.

7.2.45 Overall, stakeholders identified more strengths about Woodbridge Town Centre than weaknesses. Stakeholders suggestions of opportunities and ways to improve the town centre included: the creation/extension of shared vehicular/pedestrian space; improvements to the connectivity with the waterfront; improvements to public realm/art; and improvements to signage, particularly in areas of the centre with weak footfall.

7.2.46 All views/feedback from key stakeholders is summarised in **Appendix C** of this study.

### Town Centre Environmental Quality

7.2.47 The environmental quality of the town is generally very good, the narrow streets create a unique shopping environment and the part pedestrianisation of the Thoroughfare enables shoppers to amble through the centre at a more relaxed pace.

7.2.48 The town has strong architecture and many buildings are of historical design given the towns protection under its Conservation Area designation. The majority of shopfronts and signage are well maintained and in keeping with the character of the town centre. The paving is also generally of good quality with Gobbitts Yard providing a particularly pleasant environment.

7.2.49 The pavement down Quay Street towards the railway station and river is fairly narrow and there are limited commercial uses at present. This is one of the main routes to the leisure uses located at the south of the town and therefore would benefit from some public realm improvements.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.2.50 Overall, when assessed against the vitality and viability health check indicators, we consider that Woodbridge Town Centre is both vital and viable.

7.2.51 Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows.

- **Strengths and Opportunities**
  - There is a good and mixed comparison goods offer including some premium brand retailers.
  - There is a good mix of both national and independent occupiers.

- The centre has a low number of vacant units.
- There is good demand from retail and leisure operators.
- The centre has good accessibility by all modes of transport.
- There is ample car parking provision.
- There is potential to improve the pedestrian link between the town centre and the waterfront.
- The environmental quality of the town centre is generally very good.

- **Weaknesses and Threats**
  - Due to the low vacancy rate there are limited available units to meet operator requirements.
  - Whilst the Co-op foodstore provides an important anchor store for the town centre it does not meet the full requirements of a main food shop.
  - The pedestrian link between the town centre and the waterfront is relatively poor.
  - The level of leisure service provision, in the town centre, other than food and drink is low (albeit The Riverside Venue is located just outside the town centre).
  - The nature of and further expansion of out of centre retail and leisure floorspace at Martlesham Heath.
  - There appears to be limited opportunity for the town centre to grow.

## 7.3 Felixstowe Town Centre

7.3.1 Felixstowe, an Edwardian seaside town, is located on the coast of the Felixstowe Peninsular just to the north of Felixstowe Port, the UK's biggest container port, between the River Deben and River Orwell. The town is located approximately 12 miles to the east of Ipswich.

7.3.2 Felixstowe Town Centre is the largest in the Suffolk Coastal district. The centre is linear in form with Hamilton Road providing the main retail and leisure provision.

7.3.3 The town centre, as defined in the Felixstowe Peninsula AAP (adopted January 2017), primarily extends along Hamilton Road from its junction with High Road West to the north to is junction with Bent Hill to the South. It also includes Highfield Road, Crescent Road and the railway station off Railway Approach. The town centre's Primary Shopping Area (PSA) is slightly more confined and starts from the Great Eastern Square to the north (including the Co-Op Supermarket, Brantano and M&Co unit) running down Hamilton Road to Hamilton Gardens to the south.

### Diversity of Uses & Representation

7.3.4 A review of the diversity of retail and service uses accommodated in the town centre has been undertaken and our findings are detailed below.

7.3.5 Overall, Felixstowe Town Centre provides some 208 retail and leisure units. A breakdown of the unit numbers in the town centre is shown below in Figure 7.7.

**Figure 7.7 Felixstowe Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 18 | 9 | 19 | 9 | 9 |
| Comparison | 90 | 45 | 93 | 45 | 32 |
| Retail Service | 23 | 11 | 29 | 14 | 14 |
| Leisure Service | 34 | 17 | 37 | 18 | 24 |
| Finance & Business Service | 23 | 11 | 22 | 11 | 11 |
| Vacant | 14 | 7 | 6 | 3 | 11 |
| **TOTAL** | **202** | **100** | **208** | **100** | **100** |

*Source: Experian Goad Survey, November 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

7.3.6 Figure 7.8 below also provides an analysis of the current retail and leisure commercial floorspace and compares it to the Experian Goad Survey of November 2015.

**Figure 7.8 Felixstowe Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 6,680 | 17 | 6,770 | 17 | 16 |
| Comparison | 16,800 | 43 | 17,940 | 45 | 36 |
| Retail Service | 2,170 | 6 | 2,940 | 7 | 7 |
| Leisure Service | 7,650 | 20 | 7,780 | 19 | 25 |
| Financial & Business Service | 3,860 | 10 | 3,750 | 9 | 8 |
| Vacant | 1,960 | 5 | 1,020 | 3 | 9 |
| **Total** | **39,120** | **100** | **40,200** | **100** | **100** |

*Source: Experian Goad Survey, November 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

7.3.7 A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix P**.

<u>Convenience Goods</u>

7.3.8 The current level of convenience retail provision within the town centre (19 (9%)) is in line with the national average (9%). The level of convenience floorspace within the town centre is slightly above the national average. The number of convenience units has not increased since 2015 although the amount of convenience floorspace has marginally increased.

7.3.9 The convenience offer is anchored by a Co-op foodstore which provides some 3,760sq m gross floorspace. There is also a Tesco Metro foodstore (948sq m gross floorspace) and an Iceland store (838sq m gross floorspace) selling frozen food items. The convenience sector also includes a number of independent retailers including a bakery, confectionary store, butcher, greengrocer, two off-licences, 3 newsagents and a tobacconist. National multiple retailers, in addition to Co-op, Iceland and Tesco, include Greggs and Holland and Barrett.

Comparison Goods

7.3.10 Felixstowe Town Centre's has a reasonably good comparison goods offer with 17,940sq m floorspace provided through 93 units. Of these 93 units, 18 offer clothing and footwear and include national multiple retailers such as Clarks, Shoe Zone, Burton, New Look, Dorothy Perkins, Peacocks, Edinburgh Woollen Mill, and Bon Marche. There is also M&Co and Brantano concessions located within the Co-Op foodstore supplementing the clothing and footwear offer. National retailers occupy 44% of the total number of comparison goods units in the town centre.

7.3.11 The town centre contains 7 of the 29 'major retailers' which Experian consider to be key attractors and therefore most likely to improve the attraction of a centre for consumers. The 7 retailers include Marks & Spencer, Argos, Burton, Boots, WHsmith, Tesco, and Dorothy Perkins. Whilst a number of the other 'major retailers' listed by Experian are department stores, including John Lewis and House of Fraser, which we consider the units in Felxistowe Town Centre to be physically too small to be able to accommodate, there are a number of notable absences including River Island, Next, TopShop, and Wilkinson.

7.3.12 The town centre provides a good number of independent retailers with current proportion of units representing 56% (52 units) of the total comparison goods units. The independent sector has a particular focus on gifts, travel accessories, home/decoration, and arts and crafts.

7.3.13 It is noted that the centre also provides 10 charity shops, which equates to 5% of the total number of units within the town centre. The proportion of charity units in the centre is higher than the UK average of 3%.

Retail Services

7.3.14 The proportion of retail service units and floorspace in the town centre is identical to the national average (14% and 7% respectively). Overall, there are currently 29 retail service units in total providing 2,940sq m floorspace.

7.3.15 Since 2015 the centre has seen new hair and beauty salons, photography services and a natural health therapy unit opening. Overall, since 2015 there has been an increase in retail service floorspace of circa 800sq m.

7.3.16 Generally, there is a good range of retail services available in the town centre, including hairdressers, beauty salons, travel agents and photography services.

Financial and Business Services

7.3.17 Felixstowe Town Centre provides a number of financial and business services including 7 banks/building societies (Barclays, TSB, HSBC, Santander, Halifax, Natwest and Nationwide). There is also numerous estate agents and solicitors, as well as a Job Centre Plus establishment.

7.3.18 Since 2015 there has been a slight reduction (1 unit / -110sq m gross) in town centre financial and business service provision. Currently, there are 22 units in financial and business use providing 3,750sq m of floorspace. This compares with the national average suggesting that Felixstowe contains a good choice of financial and business services.

Leisure Services

7.3.19 The leisure services available within Felixstowe Town Centre consists of 37 units and includes a variety of cafe and restaurants including take away establishments. Operators include Prezzo, Subway, Wimpy, Costa and Caffe Nero alongside a range of independents.

7.3.20 Leisure services are generally provided by independent operators (81%). There are also 3 bars, two betting offices, a hotel (The Orwell) and cinema (The Palace) present within the town centre. All of which are independently operated except for betting offices operated by Coral and Ladbrokes.

7.3.21 In unit and floorspace proportion terms the current leisure provision within the town centre is below the national average (18% compared to 24% for unit provision and 19% to 25% in floorspace terms).

7.3.22 The proportion of public houses/ bars in in the town centre (2%) is below the national average (4%). In contrast, the proportion of cafes/ restaurant units in the town centre (10%) is broadly comparable to the UK average.

7.3.23 Leisure service provision also includes The Orwell Hotel, located in the northern part of the centre and The Palace Cinema, located in the middle of the centre. The Palace Cinema occupies some 970sq m floorspace and contains 2 screens. The cinema has 2 daily showings of current blockbuster films and an additional daily showing of recently released films.

7.3.24 Leisure provision in the town centre is, at the current time, complimented by additional leisure services along the seafront, just 100 metres walk (albeit a relatively steep gradient) from the centre of Felixstowe Town Centre. The seafront contains significant commercial leisure offer and specific locations along the front at the pier, former boating lake, Sunday market site and Landguard are earmarked for tourism and commercial leisure development in the East Suffolk Business Plan and the Felixstowe Peninsula Area Action Plan.

Arts and Cultural Facilities

7.3.25 In addition, to the blockbuster screenings, The Palace cinema also offers Event Cinema including live theatre and event broadcasts from the Royal Opera House, National Theatre Live and Royal Shakespeare Company Live.

7.3.26 The Spa Pavilion is located to the southeastwards of the town centre providing additional cultural facilities. The Pavilion contains a theatre, music hall and restaurant area. A variety of shows are held at the pavilion including pantomimes, comedians, musicians and concerts.

## Vacancies

7.3.27 The vacancy rate within the town centre is significantly below the national average in both floorspace and unit terms. At the time of our survey only 6 units were recorded as vacant, which represents just 3% of the overall number of commercial units in the town centre. The number of vacant units in the town centre has significantly decreased since 2015 from 14. The majority of units that were vacant in 2015 have been re-occupied suggesting a good level of unit 'churn' and no long term vacancy problems within the town.

7.3.28 The majority of the current units which are vacant are of small size providing between 10 and 130sq m floorspace. Only one vacant unit is larger, the former Post Office at 143-147 Hamilton Road (690sq m floorspace). It is understood that the Post Office unit was only vacated in November 2016. We are not aware if an occupier has been secured for the unit.

7.3.29 It is noted that there are no vacant units within the Primary Retail Frontage. The very low level of vacant units in the town centre indicate that the centre is healthy and demand for units is good.

## Retailer & Leisure Requirements

7.3.30 Combined Costar and 'The Requirements List' identify a total of 8 retail and commercial leisure operators currently seeking premises in the town centre.

**Figure 7.9: Registered Requirements, Felixstowe**

| Name | Minimum Size (sq m) | Maximum Size (sq m) |
|---|---|---|
| Farmfoods | 557 | 743 |
| Mind | 79 | 140 |
| Select | 278 | 464 |
| Brighthouse | 139 | 464 |
| Poundworld | 464 | 1,114 |
| Vets 4 Pets | 111 | 232 |
| Travelodge | 929 | 3,716 |
| KFC | 167 | 325 |

*Source: Costar and 'The Requirements List'*

7.3.31 Figure 7.9 shows that there is a reasonably good demand from retail and commercial leisure operators seeking representation. The demand is, in part, supported by a very limited number of vacant units in the town centre.

### Pedestrian Flows

7.3.32 The Council do not currently have any footfall/pedestrian count data available for Felixstowe Town Centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall across the town centre.

7.3.33 Pedestrian activity at Felixstowe was recorded to be healthy at the time of visits with particularly high levels recorded within the pedestrianised part of Hamilton Road. High levels of pedestrian activity were also monitored in the vicinity of the Co-op and Tesco stores, particularly in the Co-op car park. Lower levels of footfall were recorded at the southern end of Hamilton Road and Orwell Road. The lower levels of footfall recorded at the southern end of Hamilton Road is, in part, likely due to the survey's being undertaken during the 'off peak' season. We understand the southern part of the town centre benefits from higher levels of footfall in the summer season.

### Accessibility

7.3.34 The town centre benefits from a centrally located train station off Railway Approach. The station provides frequent rail services to Ipswich via Trimley and Westerfield.

7.3.35 Bus stops are located within the town centre along Hamilton Road, Crescent Road and Orwell Road. There are National Express coach services to London departing from Hamilton Road and frequent local bus services to Ipswich, Woodbridge, Otley as well as Landguard Fort and the Docks.

7.3.36 The town centre also benefits from being easily accessible by car with the main vehicular route via the A14 and A154. Car parking is provided at the following car parks:

- Railway Station Car Park – situated to the north of the centre providing around 200 spaces,
- Crescent Road Car Park – contains around 140 spaces with maximum stay 18 hours; and
- Ranleigh Road Car Park – to the south of the town which contains some 210 spaces.

7.3.37 Additional short stay on-street car parking is also provided along Hamilton Road and car parking is provided to the south of the town centre along the Promenade at Undercliff Road West.

7.3.38 The town centre is also accessible on foot from the surrounding residential area and ample cycle parking is present along Hamilton Road.

### Perception of Safety

7.3.39 In terms of safety, Felixstowe Town Centre is generally perceived to be a safe. No issues have been raised by key stakeholders or respondents in the NEMS survey in relation to safety in the town centre nor was improvements to town centre safety raised as a concern.

7.3.40 Felixstowe was the pilot town centre for the Stay Safe scheme co-ordinated by the Suffolk Hate Crime Service and run in partnership with a range of other county-wide organisations including the Suffolk Constabulary, Realise Futures and Leading Lives. The scheme involves retailers and other organisations within the town to sign up to become a 'Stay Safe Place' providing support and somewhere safe to anyone vulnerable or if faced with an unsafe situation when in the town centre.

7.3.41 Similar to Woodbridge, Felixstowe is also involved in the Town Pastor Scheme with Christian volunteers patrolling the town centres Friday and Saturday evenings.

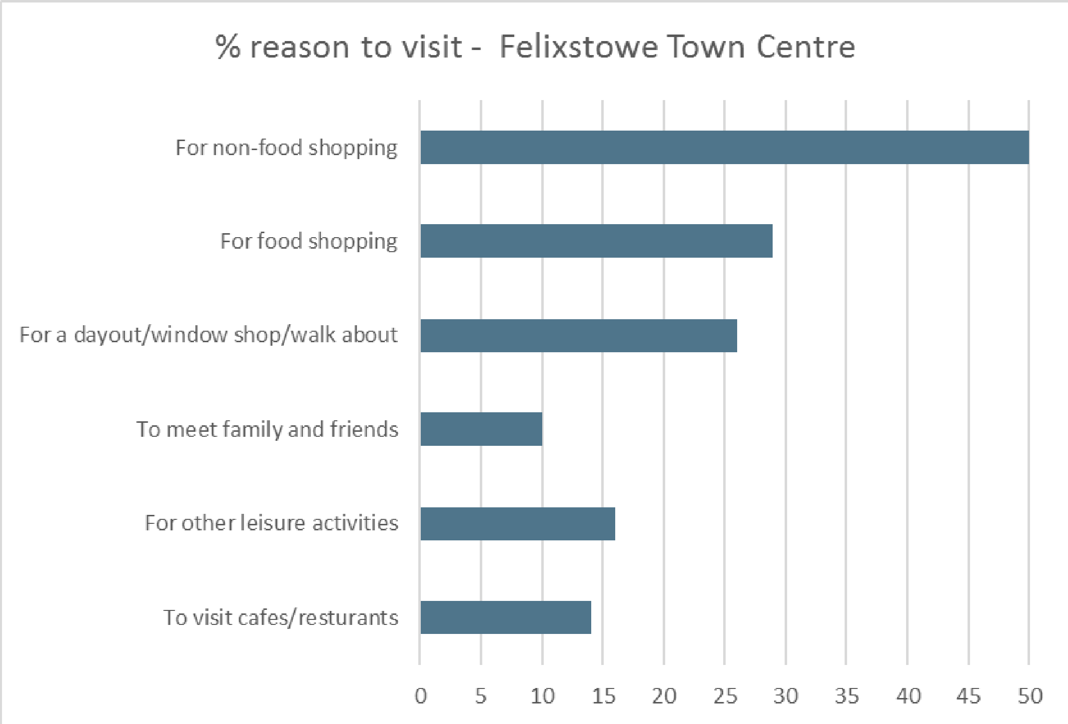
7.3.42 The town centre also provides conveniently and appropriately located pedestrian crossing facilities along Hamilton Road and low traffic speeds help control vehicular traffic. Similarly, street lighting is provided throughout the majority of the centre.

### Views and Behaviour

7.3.43 The NEMS household survey provides information on respondent's views and behaviours regarding Felixstowe Town Centre.

7.3.44 As identified in Figure 7.10 the main reason/s why respondents visit Felixstowe Town Centre is for non-food shopping (50%) and food shopping (29%). Further main reason/s identified for visiting are: for a day out (26%); for leisure activities (16%), and; to visit cafés and restaurants (14%).

**Figure 7.10: Main Reason for Visiting Felixstowe Town Centre**

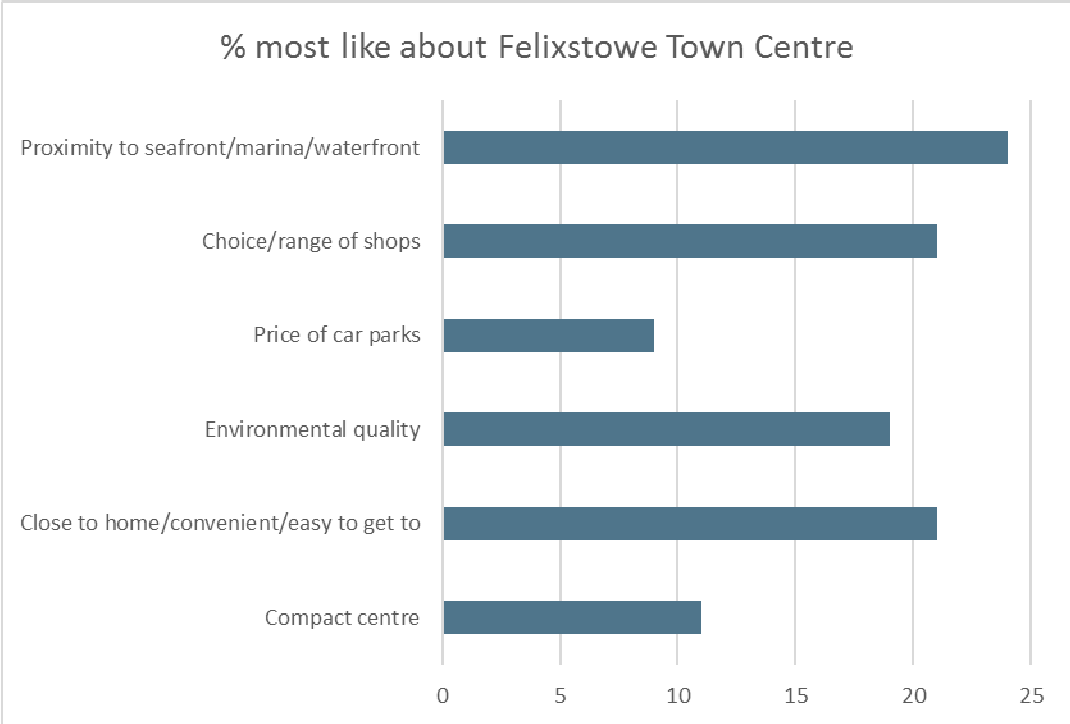



*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.3.45 Figure 7.11 overleaf highlights what users of Felixstowe Town Centre like most about the centre. Almost a quarter of respondents (24%) like the town centre's proximity to the seafront, this was closely followed by those who like the range of shops (21%) and the fact that it was close to home/ convenient to get to (21%). A further 19% of respondents made reference to the town centre's environmental quality with 11% liking the centre being compact in size.

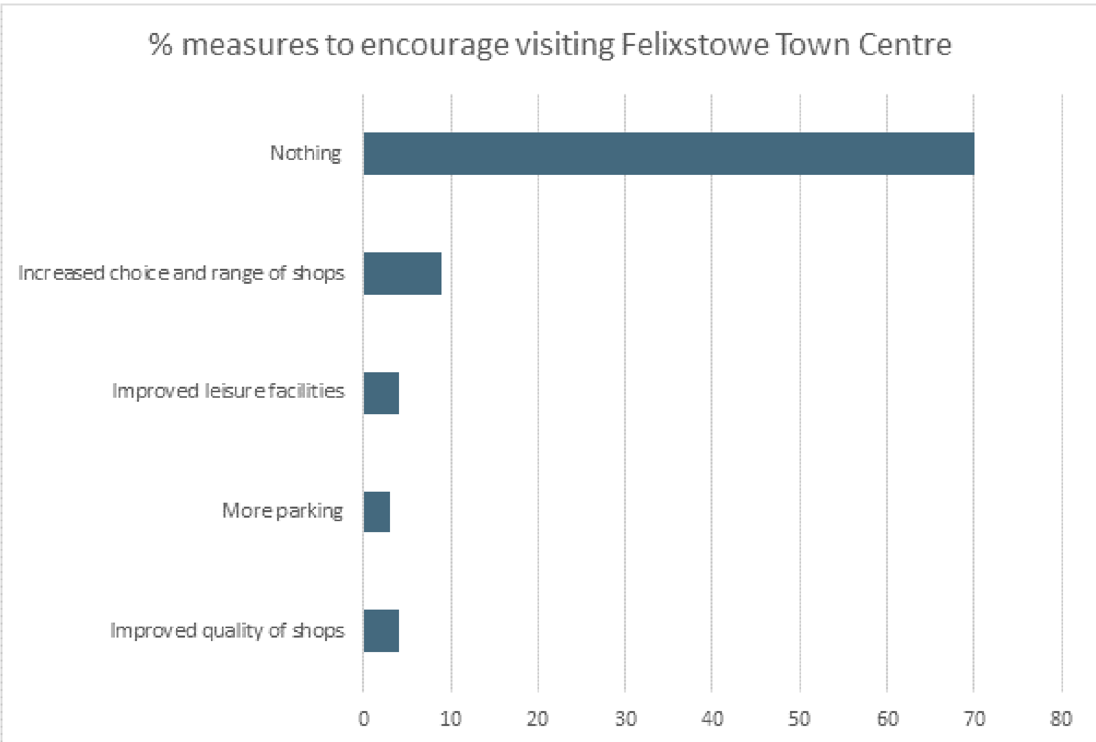
7.3.46 The measures that would encourage users of Felixstowe Town Centre to visit more often are detailed overleaf at Figure 7.12. The majority of respondents (70%) said no measures would encourage them to visit more often suggesting that they were satisfied with the town centre. The actual measures that were cited by respondents included: increased choice and range of shops (9%); improved leisure facilities (4%), quality of shops (4%) and more parking (3%).

**Figure 7.11: Main likes about Felixstowe Town Centre**




*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

**Figure 7.12: Measures that would encourage visits to Felixstowe Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 53% of respondents visited the town centre more than once a fortnight.*

7.3.47 In terms of our engagement with key stakeholders, a number of views on Felixstowe Town Centre were identified. These include:

- There are a good mix of shops and cafes.
- The centre conveys a safe feeling aided by its layout and condensed size.
- The seafront and Languard Fort are located nearby.
- Shared vehicular and pedestrian space on Hamilton Road makes shops more inviting.
- Free car parking is available at the seafront.
- Pedestrian connectivity between town centre and seafront is poor.
- The centre lacks a good foodstore.
- There is a lack of car park directional signage.
- There is a lack of car parking.

7.3.48 Similar to Woodbridge Town Centre, stakeholders identified more strengths about Felixstowe Town Centre than weaknesses. Stakeholders also provided their suggestions of ways to improve the town centre and potential opportunities. These included: improving the food offer and commercial leisure activities within the centre; improving the links between the centre and seafront; extending the shared vehicular/pedestrian space; and improving car parking provision.

7.3.49 **Appendix C** contains a summary of all key stakeholder views obtained as part of this study.

### Town Centre Environmental Quality

7.3.50 In general, the quality of the environment within the town is pleasant with little evidence of graffiti or litter. The shared pedestrian/ vehicular space provided along Hamilton Road from Cobbold Road to Orwell Road creates a safe shopping environment and uses high quality paving materials.

7.3.51 The environmental quality of the centre is enhanced by a number of trees and planting beds. Street furniture/benches are provided at appropriate locations together with litter bins. Hanging baskets on street lamp post also enhance the centres environmental quality in the summer months.

7.3.52 Outside of the shared pedestrian/vehicular space, the town benefits from generous pavements widths throughout and the green/ public space outside Tesco Metro along Hamilton Road is also a positive addition to the town. To the north of the town regular pedestrian crossing facilities are provided to create a safe and convenient shopping experience.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.3.53 Overall, Felixstowe Town Centre is considered to display healthy levels of vitality and viability, this is particularly evident from its low vacancy level.

7.3.54 Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows.

- **Strengths and Opportunities**
  - The town centre provides a reasonably good convenience offer, albeit lacks a medium/large foodstore fully capable of meeting a full main food shop.
  - The centre has a very low vacancy level and a good demand from multiple national operators.
  - For the size of the town, the centre provides a good range/variety of national multiple and independent comparison goods retailers.
  - There is a strong presence of national banks within the centre.
  - The centre benefits from good access via car and ample car parking facilities.
  - The centre has an accessible and centrally located railway station.
  - The town centre provides a good leisure services offer including a cinema, a hotel and a good range of cafes/ restaurants.
  - The potential opportunity to strengthen the relationship between the town centre and seafront to increase the number of linked trips.
  - Reoccupation of the vacant former Post Office unit opportunity to attract a key retail/ leisure operator to the town.
- **Weaknesses and Threats**
  - The town centre lacks a department store, albeit the size of the existing units and lack of potential opportunity site in the prime retail area, coupled with the location of retail facilities in Ipswich, results in it being difficult to meet requirements from a department store operator, if any should arise.
  - The provision of charity shops in the centre is higher than the UK average.
  - There is an under provision of public houses and bars in the centre.
  - The lack of available units and sites to potentially meet requirements for medium/large 'prime pitch' units.
  - The potential of retail and leisure proposals being brought forward outside the town centre to meet outstanding occupier requirements for presence in the town.

## 7.4 Saxmundham Town Centre

7.4.1 Saxmundham is a small historic market town located north east of Woodbridge. The town is bordered by the River Fromus to the east and the A12 trunk road to the west.

7.4.2 The formation of the town centre is primarily linear in form running along the High Street, with additional units provided at Market Place and to the south east along Church Street. The centre provides some 64 retail and service units within 10,930sq m gross floorspace.

7.4.3 The Site Allocations and Area Specific Policies DPD (Adopted January 2017) identifies the town centre boundary and shopping frontages as follows:

- The town centre boundary runs along the railway line, around Park Farm to the south, cuts across South Entrance and around Tesco and adjoining retail units and along Fromus Path to the north till it meets the railway line.
- The Primary Shopping Area (PSA) covers Market Place and High Street, and the Tesco, Waitrose and other units on Church Street.
- Primary Shopping Frontages cover both sides of High Street to the south of Station Approach and the eastern side of High Street up to no. 46.
- Secondary Shopping Frontages are at the western side of High Street up to Street Farm Road, both sides of Market Place and along the southern side of Church Street.

### Diversity of Uses and Representation

7.4.4 In total, Saxmundham Town Centre provides 64 commercial retail and leisure units. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix P**. A breakdown of the unit numbers in the town centre is shown in Figure 7.13 below.

**Figure 7.13 Saxmundham Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 6 | 10 | 8 | 13 | 9 |
| Comparison | 21 | 33 | 21 | 33 | 32 |
| Retail Service | 8 | 13 | 10 | 16 | 14 |
| Leisure Service | 11 | 17 | 11 | 17 | 24 |
| Finance & Business Service | 9 | 14 | 8 | 13 | 11 |
| Vacant | 8 | 13 | 6 | 9 | 11 |
| **TOTAL** | **63** | **100** | **64** | **100** | **100** |

*Source: Experian Goad Survey, December 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

7.4.5 Figure 7.14 below also provides an analysis of the current retail and leisure commercial floorspace and compares it to the Experian Goad Survey of December 2015.

**Figure 7.14 Saxmundham Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 3,970 | 37 | 4,210 | 39 | 16 |
| Comparison | 2,480 | 23 | 2,340 | 21 | 36 |
| Retail Service | 700 | 7 | 730 | 7 | 7 |
| Leisure Service | 1,520 | 14 | 1,520 | 14 | 25 |
| Financial & Business Service | 1,240 | 12 | 1,550 | 14 | 8 |
| Vacant | 780 | 7 | 600 | 5 | 9 |
| **Total** | **10,690** | **100** | **10,930** | **100** | **100** |

*Source: Experian Goad Survey, December 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

Convenience Goods

7.4.6 The town centre has a strong convenience goods offer. It consists of 8 convenience units, two of these are supermarkets Tesco and Waitrose, providing 1,453sq m and 1,343q m net floorspace respectively. The convenience provision within the centre is further supplemented by two bakeries, butcher, off-licence and CTN. As a result of the two large foodstores, the convenience floorspace within the town is substantially higher than the national average (39% compared to 16%).

7.4.7 The convenience provision has increased by two units since 2015 with the addition of Stuffed Bakery and Saxon Wines. Since the Council's 2008 Retail Study convenience good provision has increased significantly primarily due to opening of Tesco store in 2012.

Comparison Goods

7.4.8 For its size and role, it is considered Saxmundham Town Centre provides a reasonable comparison goods offer. Overall, the centre provides 21 comparison goods units occupying 2,340sq m floorspace. The number of units remains unchanged since December 2015 although the floorspace has decreased slightly. The current proportion of comparison goods units is broadly comparable to the UK average, although in floorspace terms is substantially lower. This lower proportion of comparison goods floorspace is primarily due to the Tesco and Waitrose stores providing a significant level of the overall retail and leisure town centre floorspace.

7.4.9 Comparison goods retailers within the town centre are predominantly independents (86%). National multiple retailers include the Original Factory Shop, Co-Operative Pharmacy and St Elizabeth Hospice Charity Shop.

7.4.10 The comparison goods offer includes bookstores, a card shop, a gift shop, an art shop/gallery, a carpet shop, interior decoration store, a florist and a jeweller. Clothing and footwear is limited to the Original Factory Shop, The Store and two charity shops. It is noted that the centre also contains a chemist and an optician.

Retail Services

7.4.11 The retail services within the town centre generally consist of health and beauty services (8 of the 14 units). In addition, there is also a post office and dry cleaners, bringing the total retail service floorspace to 730sq m. Since December 2015 the retail service sector has increased by two units with the addition of Ollie's Barbers and The Studio Body Piercings.

7.4.12 The current proportion of retail service units and floorspace in Saxmundham Town Centre is comparable to the UK average.

Financial and Business Services

7.4.13 For its size, Saxmundham Town Centre provides a good range of financial and business services. The current proportion of financial and business services provided in the centre, both in terms of unit and floorspace, is above the UK average. Financial and business services include four estate agents, one solicitor, and three banks/building societies (HSBC, Barclays and Ipswich Building Society).

7.4.14 Since 2015 the only change within the financial and business services sector of the town centre is the loss of an accountant and the addition of an estate agent.

Leisure Services

7.4.15 Leisure services occupy 11 town centre units within some 1,520sq m floorspace. Provision includes a number of food and drink establishments (4 takeaways, 5 cafes/restaurants/coffee shops), a betting office and The Bell Hotel. All of the operators are independent with the exception of Coral Betting Office and Costa Coffee. Since 2015 the number of units and floorspace in leisure service use has remained the same.

7.4.16 The proportion of town centre units and floorspace in leisure service use is significantly below the UK average. Notwithstanding this, having regard to the size and role of the town centre and the fact that additional food and drink provision is provided in Waitrose we do not consider that there is a deficiency in leisure provision. There is however, a deficiency in terms of drinking establishments with no bars or public houses located within the centre, with the exception of a bar located within the Bell Hotel.

7.4.17 Saxmundham does not contain a cinema or any bingo establishments, yet bingo is held weekly at Gannon Rooms to the west of the centre.

Arts and Cultural Facilities

7.4.18 Arts and cultural facilities in the town centre are limited to Saxmundham Museum. The museum, which displays artefacts and information on the history of the town, is open seasonally from April.

## Vacancies

7.4.19 The town centre currently contains only 6 vacant units comprising 600sq m in total. Four of the vacant units are retail/service units and two are vacant public houses. The vacant units are interspersed throughout the centre, with 5 located along the High Street and one on Station Approach. All of the vacant units are small in size, ranging from 20sq m to 210sq m.

7.4.20 Since 2015, the number of vacant units has decreased by two. The current proportion, both in floorspace and unit terms, is below the national average.

## Retailer & Leisure Requirements

7.4.21 Combined Co-Star and 'The Requirement List' identify 3 retailer/leisure operator requirements seeking premises in the town centre.

**Figure 7.15: Registered Requirements, Saxmundham**

| Name | Type | Minimum Size (sq m) | Maximum Size (sq m) |
|---|---|---|---|
| Aldi | Convenience | 418 | 1,858 |
| Savers | Comparison | 185 | 325 |
| Cats Protection | Comparison | 26 | 185 |

*Source: Costar and 'The Requirements List'*

7.4.22 For the size of the town, and its role in meeting a local catchment, the reasonably low level of requirements from national multiples is not considered to be of particular concern. We note that the 2008 Retail Study identified a requirement from Marston's for a circa 2,000sq m gross public house/restaurant. We note that this requirement was unmet and that, perhaps given the limited unit sizes in the town centre, Marston's no longer have a requirement for premises in the town centre.

## Pedestrian Flows

7.4.23 The Council do not currently have any footfall/pedestrian count data available for Saxmundham Town Centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall within the town centre.

7.4.24 Pedestrian activity was particularly healthy in the vicinity of the Tesco and Waitrose stores and their respective car parks. A reasonable level of pedestrian linkage was monitored along the pedestrian link between the Waitrose store and the High Street.

7.4.25 Good levels of footfall were also monitored along the southern and middle parts of the High Street and Market Place. Lower levels of footfall were monitored at the northern end of the High Street in the vicinity of the Royal Main Sorting Office.

### Accessibility

7.4.26 The town centre is considered to benefit from good accessibility by public transport. Saxmundham Railway Station is located on Station Approach and is on the East Suffolk line between Ipswich and Lowestoft. Services generally run hourly and include stops en-route to Wickham Market, Melton and Woodbridge. Bus stops are located adjacent to the Waitrose store on Church Street, to the north of High Street and to the south of the town on South Entrance. Services run to Aldeburgh, Leiston, Aldringham and Halesworth.

7.4.27 In terms of town centre car parking provision, the centre benefits from large car parks provided at the Waitrose (circa 100 spaces (free for up to 2 hours)) and Tesco (approximately 300 spaces (up to 2 hours for store customers only)) stores. A summary of the other car parking provision is provided below:

- Church Street – approximately 60 spaces pay and display;
- Market Place Car Park – approximately 70 spaces long-stay pay and display; and
- Station Car Park – 18 spaces free of charge for railway users.

7.4.28 Both the Tesco and Waitrose car parks were monitored to be particularly busy during our visits.

7.4.29 Cycle parking is also located along Church Street outside The Original Factory Shop, at the Tesco store and the Waitrose store.

### Perception of Safety

7.4.30 Saxmundham Town Centre was considered to be safe at the time of visits. Safety is aided by its condensed size and lack of areas that have inactive frontages. Pedestrian crossing facilities are located along the High Street and on Church Street to assist shoppers in navigating the centre safely. Traffic speeds were monitored to be reasonable which is aided by the traffic light junction at High Street and Church Street.

7.4.31 The town centre is involved in the Suffolk Wide 'Stay Safe' scheme co-ordinated by Suffolk Hate Crime Service. We understand that a number of local businesses within the centre are part of the scheme and have received relevant training.

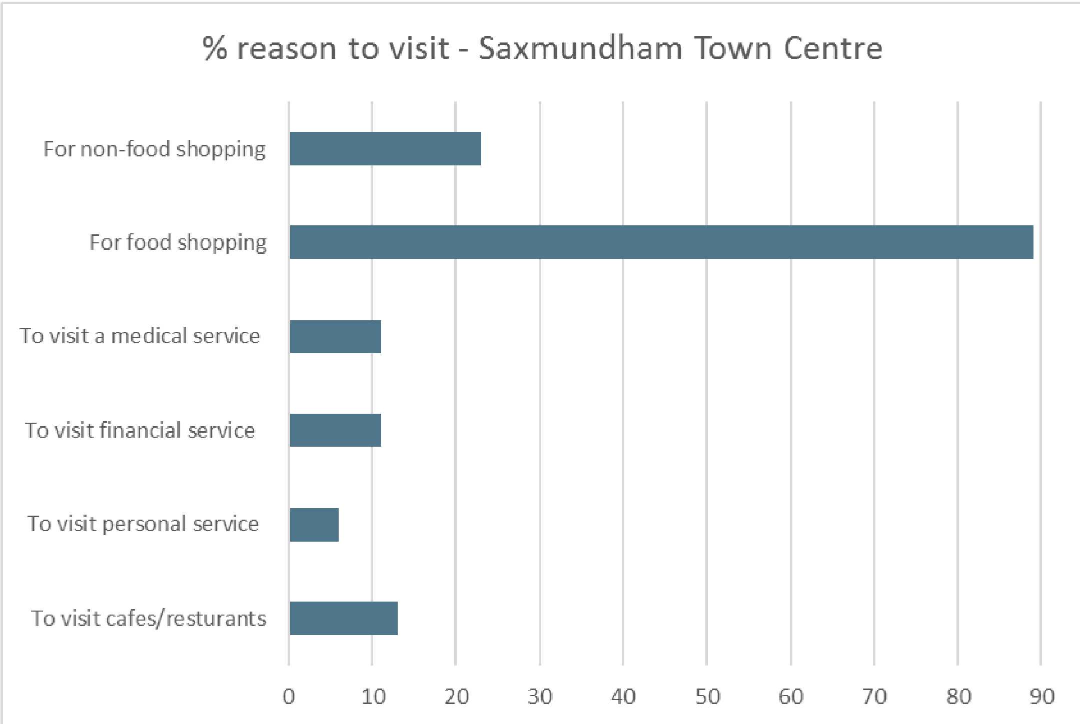
7.4.32 We note no issues were raised by key stakeholders in relation to safety in the town centre nor were improvements to town centre safety raised as a concern by NEMS survey respondents.

### Views and Behaviour

7.4.33 Information on the main reasons why respondents visit Saxmundham Town Centre has been obtained from the NEMS survey, which includes what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

7.4.34 The main reason/s why respondents visit Saxmundham Town Centre is shown below in Figure 7.16. As the graph highlights, the vast majority of respondents stated their main reason for visiting the town centre was for food shopping (89%). The second most popular reason/s for visiting the centre was for non-food shopping (23%). Other main reason/s for visiting the town centre include: for cafes and restaurants (13%); for financial services (11%), and; for medical services (11%).

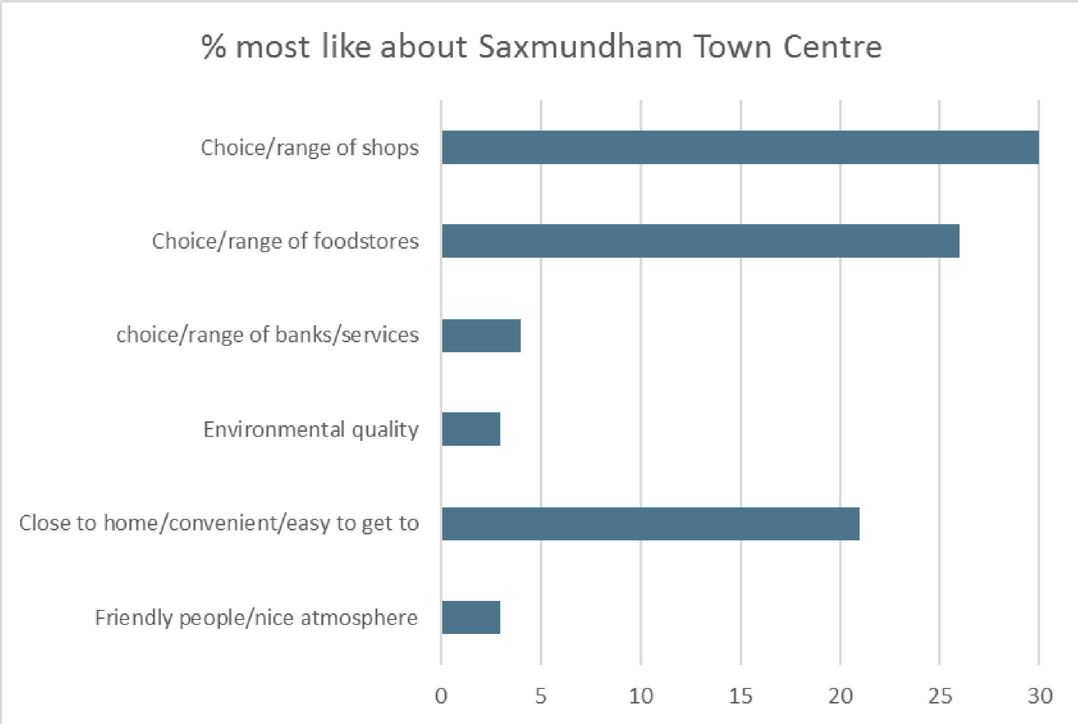
**Figure 7.16: Main Reason for Visiting Saxmundham Town Centre**




*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.4.35 In terms of what respondents most liked about Saxmundham Town Centre, the most popular responses were: the choice/ range of shops (30%); the choice/ range of foodstores (26%), and; the location of the centre being close to home/convenient to access (21%).

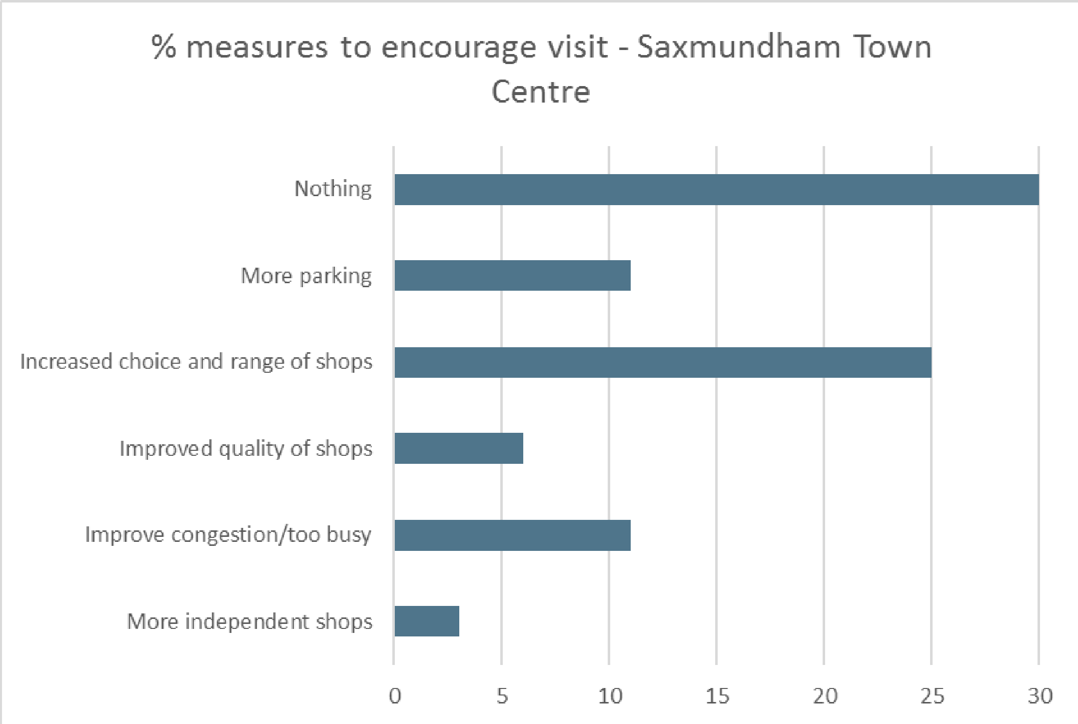
**Figure 7.17: Main likes about Saxmundham Town Centre**




*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.4.36 Figure 7.18 below summarises the measures that would encourage users of Saxmundham Town Centre to visit the centre more often. The highest proportion of respondents (30%) cited that nothing would encourage them to visit more often suggesting they are content with the centre. In terms of those that suggested measures that would encourage them to visit the town centre, the most popular suggestions were: increasing the range of shops (25%); improving the congestion in the centre (11%); providing more parking (11%); and improving the quality of shops (6%).

**Figure 7.18: Measures that would encourage visits to Saxmundham Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 77% of respondents visited the town centre more than once a fortnight.*

7.4.37 In terms of opinions of Saxmundham Town Centre from key stakeholders, primarily from the workshop, the following comments were expressed:

- The centre has good convenience provision with Tesco and Waitrose.
- There is a good provision of local services including two banks.
- There are a variety of cafes and coffee shops.
- There is good level of car parking provision.
- The centre can be easily accessed via rail.
- The highway arrangement at High Street/Church Street is poor and there can be congestion to the south of the centre.
- The centre does not have a strong comparison goods offer.

7.4.38 Key stakeholders generally identified that the town centre had more positive attributes rather than negative ones. Potential opportunities and suggestions of ways to improve the centre were also provided by key stakeholders. It was considered that:

- the town centre could be developed as more of a leisure destination;
- the area around the railway station could be redeveloped to improve the environment/gateway to the town centre for those arriving by rail;

- the public realm could been improved; and
- a good 'mid-range pub' could be established in the centre.

7.4.39 A summary of all key stakeholder views/opinions obtained as part of this study are summarised at **Appendix C**.

### Town Centre Environmental Quality

7.4.40 The environmental quality of the town centre is considered to be good, particularly along Market Place and the southern and middle parts of High Street. However, the environmental quality on High Street is slightly marred by through traffic and Station Approach could benefit from environmental enhancement to improve the linkage between the railway station and High Street. Furthermore, the large Royal Mail sorting office is not considered to particularly contribute positively to the environmental quality of the centre.

7.4.41 At the time of our visits there was little evidence of graffiti or litter. Furthermore, the majority of the units in the town centre appeared well maintained and in good/attractive condition.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.4.42 Overall, we consider that Saxmundham Town Centre, which displays a low vacancy rate and a strong convenience goods offer, is healthy.

7.4.43 Having regard to our vitality and viability health check assessment, including feedback from key stakeholders, we consider that the principal strengths, weaknesses, opportunities and threats to Saxmundham Town Centre are as follows:

- **Strengths and Opportunities**
  - The town centre has a strong convenience retail offer.
  - There is a reasonably good range of financial services with provision of two major banks having branches within the town.
  - The centre provides a centrally located Hotel.
  - There is ample car parking provision in the town centre.
  - There is a low vacancy rate in the town centre.
  - The centre benefits from good accessibility by public transport.
  - Easy road access from the A12 (making it well placed to attract customers from other parts of Suffolk Coastal District as well as tourists travelling to and from the Suffolk Coast).
  - Redevelopment/regeneration of the area around the railway station.

- Improve linkages between the railway station and town centre.

- **Weaknesses and Threats**
  - The environmental quality and linkage between the railway station and High Street (along Station Approach).
  - Potential to grow the leisure offer is influenced by opportunities and capacity around existing town centre buildings, streets and public spaces.
  - There is a deficiency in public houses/ bars in the town centre.
  - The town centre does not contain a cinema.
  - The High Street/ Church Street junction can generate congestion in the centre which can slightly mar the environmental quality.

## 7.5 Aldeburgh Town Centre

7.5.1 Aldeburgh is a small affluent coastal town in the eastern part of the district. The town is situated approximately 7 miles from the A12 and accessed via A1094 Saxmundham Road. It is located to the north of the River Alde and is located entirely within the Heritage Coast and the Suffolk Coast and Heaths Area of Outstanding Natural Beauty.

7.5.2 Aldeburgh is a popular tourist destination primarily due to its Blue Flag beaches, attractive town centre and nearby historical and nature points of interest. The town provides a good cultural offering and provides an interesting historic high street adjacent and parallel to its seafront. As a result of its popularity the town contains many second homes with the retail/leisure and service offer in the town centre serving both the local permanent population and visitors/tourists.

7.5.3 Aldeburgh Town centre serves its residents strongly in its none retail aspects and functions. These same aspects and functions underpin its tourism economy making it a stimulating and interesting place for informal recreation, social interaction, cultural and community life. The balance between serving tourists and all of its small resident population of just over 2,000 is challenge.

7.5.4 Aldeburgh Town Centre is designated as a Conservation Area and contains a number of listed buildings. The town centre links directly to the seafront which runs parallel to High Street. The centre is linear in form running along the High Street from its junction with Victoria Road in the north to Crespigny Road in the south. In parts, retail and leisure commercial units are interspersed with residential. With the exception of Aldeburgh Cinema the majority of the retail and leisure units are small in size (ranging from 30sq m to 270sq m gross floorspace)

## Diversity of Uses and Representation

7.5.5 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix P**.

**Figure 7.19 Aldeburgh Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 8 | 10 | 7 | 9 | 9 |
| Comparison | 36 | 43 | 36 | 45 | 32 |
| Retail Service | 3 | 4 | 3 | 4 | 14 |
| Leisure Service | 24 | 29 | 24 | 30 | 24 |
| Finance & Business Service | 10 | 12 | 9 | 10 | 11 |
| Vacant | 2 | 2 | 2 | 3 | 11 |
| **TOTAL** | **83** | **100** | **81** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

**Figure 7.20 Aldeburgh Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 660 | 8 | 630 | 8 | 16 |
| Comparison | 3,160 | 37 | 3,080 | 36 | 36 |
| Retail Service | 260 | 3 | 260 | 3 | 7 |
| Leisure Service | 3,550 | 41 | 3,580 | 42 | 25 |
| Financial & Business Service | 840 | 10 | 750 | 9 | 8 |
| Vacant | 160 | 2 | 150 | 2 | 9 |
| **Total** | **8,630** | **100** | **8,410** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

Convenience Goods

7.5.6 The town centre contains 7 convenience goods units, all of which are small in size. There is no medium/large foodstore within the town centre (foodstore provision being located at Saxmundham Road (Co-op (445sq m net), Tesco Express (254 sq m net)). Accordingly, the town centre convenience goods provision serves a top-up shopping role. Provision includes a Co-op Daily store (270sq m net), together with a number of independent butchers, a delicatessen, a sweet shop and three off-licences. It is noted that the number of convenience units present in the town centre has decreased by one since 2015 with the loss of the Shingle and Sherbet confectionary store.

7.5.7 The proportion of convenience units in the town centre is identical to the national average. However, in the absence of any medium/large foodstore provision, in floorspace terms, the proportion of convenience floorspace is significantly below the UK average (8% compared to 16%). The absence of a convenience main-food shop facility is clearly evident.

Comparison Goods

7.5.8 Overall, there are 36 comparison goods units within the centre, representing 45% of the total commercial units. The current proportion of units in the centre is significantly higher than the national average (32%), albeit in floorspace terms, owing to the size of units in the town centre, is identical to the UK average (36%).

7.5.9 The comparison goods offer is, in part, skewed towards the tourist/visitor market. It includes a variety of stores offering clothing, footwear and accessories for men, women and children, with numerous national multiple operators present such as Joules, Musto, Fat Face, Jack Wills and Crew alongside independent retailers such as Fleur and Anjali. Notwithstanding this, national multiple retailers still only make up 31% of the comparison goods units with the majority being occupied by independent retailers.

7.5.10 In addition to clothing and footwear offer, the town has three retail art galleries, two antique stores, three gift shops and three jewellers. There is one furniture store, one electrical store and two bookshops.

7.5.11 The comparison provision within the town centre has remained largely unchanged since 2015. The centre has retained 36 comparison goods units albeit the level of floorspace has decreased by 80sq m.

Retail Services

7.5.12 The retail service offer within the town centre is considered to be weak with only 3 units, occupying 260sq m of floorspace. The three units are occupied by a Post Office, hairdresser and a travel/ tour operator. It is noted that the town centre provides no opticians, dry cleaners or repair/alteration services.

7.5.13 The retail service provision is well below the national average in terms of unit numbers (4% compared to 14%) and also floorspace (3% compared to 7%). It is noted that retail service provision has remained unchanged since 2015.

Financial and Business Services

7.5.14 Aldeburgh Town Centre contains 9 financial and business services, including 2 banks/building societies, 4 estate agents, 2 solicitors and a business services operator. For its size, it is considered the town centre provides a reasonable range of financial and business services.

7.5.15 The proportion of floorspace and units in the town centre which is occupied by financial and business services is broadly comparable to the national average.

Leisure Services

7.5.16 Aldeburgh Town Centre provides a strong leisure service offer. The current proportion of units (30%) and floorspace (42%) is above the national averages (24% and 25% respectively). Since 2015 the number of units occupied by leisure services has remained unchanged.

7.5.17 In total, 15 of the 24 leisure service units are eating establishments making up 1,390sq m of the floorspace. Of the 15 eating establishments, 10 are café's/restaurants and 5 are takeaway outlets (the majority of which are fish and chips takeaways). The cafe's/restaurants are predominantly run by independent operators except for Prezzo.

7.5.18 Aldeburgh Cinema is also located in the town centre. The cinema has one screen and generally shows two screenings per day. Films include both blockbusters and family films. The broad range of screening reflects a strong cultural and family offer.

7.5.19 The town centre also provides five bars/ public houses and two hotels (White Lion Hotel and Heritage Hideaways) and a guest house (Ann Page Cottage) within the centre.

Arts and Cultural Facilities

7.5.20 Arts and cultural facilities within the town centre comprise Aldeburgh Jubilee Hall and Aldeburgh Beach Lookout. Aldeburgh Jubilee Hall is situated at Crabbe Street and hosts a variety of cultural events.

7.5.21 Aldeburgh Beach Lookout is situated in the southern part of the town centre on Crag Path and comprises a tiny art temple facing the sea. The Lookout provides a setting for artists and we understand has hosted a number of well-known artists. A variety of events and art works are displayed throughout the year.

7.5.22 A variety of events are held in Aldeburgh, including Doc Fest, an annual documentary festival taking place across a weekend with a series of live conversations, documentaries and films shown. In addition, Aldeburgh Carnival is held annually in August. The event takes place across a weekend offering three days of festivities including carnival procession, swimming races, mini marathon, silent auction, military band and Samba Band performances as well as a number of food, drink and shopping stalls.

7.5.23 In addition to showing films, special events are held at Aldeburgh Cinema and include live theatre, opera, art exhibition and ballet transmissions from the National Theatre, New York's Metropolitan Opera, the Royal Opera House, the National Gallery, the British Museum and Moscow's Bolshoi Ballet.

### Vacancies

7.5.24 The vacancy rate in the town centre is very low, with only 2 vacant units recorded amounting to just 150sq m. Both units are located on High Street 161 High Street situated to the south of the centre contains 60sq m and 80-82 High Street situated towards the north of the centre comprises 90sq m floorspace.

7.5.25 In 2015 the town centre also contained just 2 vacant units. However, both of these units have been re-occupied which identifies that there are no long term vacancy issues within the town centre.

### Retailer & Leisure Requirements

7.5.26 We have reviewed national multiple retailer/leisure operator requirements for Aldeburgh Town Centre using 'The Requirements List' and Co-Star. At the current time, there is a requirement from Costa Coffee for premises within the town centre. Costa's requirements are for a unit of between 139sq m to 186sq m. It is noted that the 2008 Retail Study identified that Costa Coffee had a requirement for premises in the town centre. It would therefore appear that Costa Coffee have had an unmet requirement since 2008.

7.5.27 Whilst there is limited demand from national multiple operators to locate in the town centre, the very low vacancy level and churn rate in the town centre suggests that demand for units in the town centre is good.

### Pedestrian Flows

7.5.28 The Council do not currently have any footfall/pedestrian count data available for Adleburgh Town Centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall within the town centre.

7.5.29 During our visits, and despite it being off peak season, Aldeburgh Town Centre was generally busy. The highest pedestrian levels were monitored in the vicinity of the Co-Op Daily store with reasonably healthy levels of footfall also recorded along the seafront. Lower levels of footfall were at the edges of the centre at the junction with Victoria Road to the north and Crispigny Road to the south.

### Accessibility

7.5.30 The town centre is considered to be reasonably accessible by bus, with local bus stops situated along High Street providing services to nearby Market Towns of Saxmundham, Woodbridge and Leiston as well as Rendlesham, Halesworth and Ipswich. The town is not on the railway network so public transport provision is solely local bus services. We understand that community rail initiatives are exploring bus integration with nearby community rail stations similarly to those already existing between Southwold and the East Suffolk line.

7.5.31 In terms of accessibility by car, the town centre is accessed via the A1094 and the A12. There are 4 public car parks in and around the centre offering short stay pay and display car parking as follows:

- Oakley Square – provides around 30 spaces;
- King Street Car Park – provides approximately 40 spaces;
- Thorpe Road – contains approximately 240 spaces; and
- Fort Green – provides around 81 spaces.

7.5.32 In addition, car parking within the centre is further supplemented by a significant amount of free on-street short stay parking (2 hours) on the High Street.

7.5.33 Cycle parking facilities are available at the centre of High Street opposite Co-Op Daily and also on Crag Path.

**Perception of Safety**

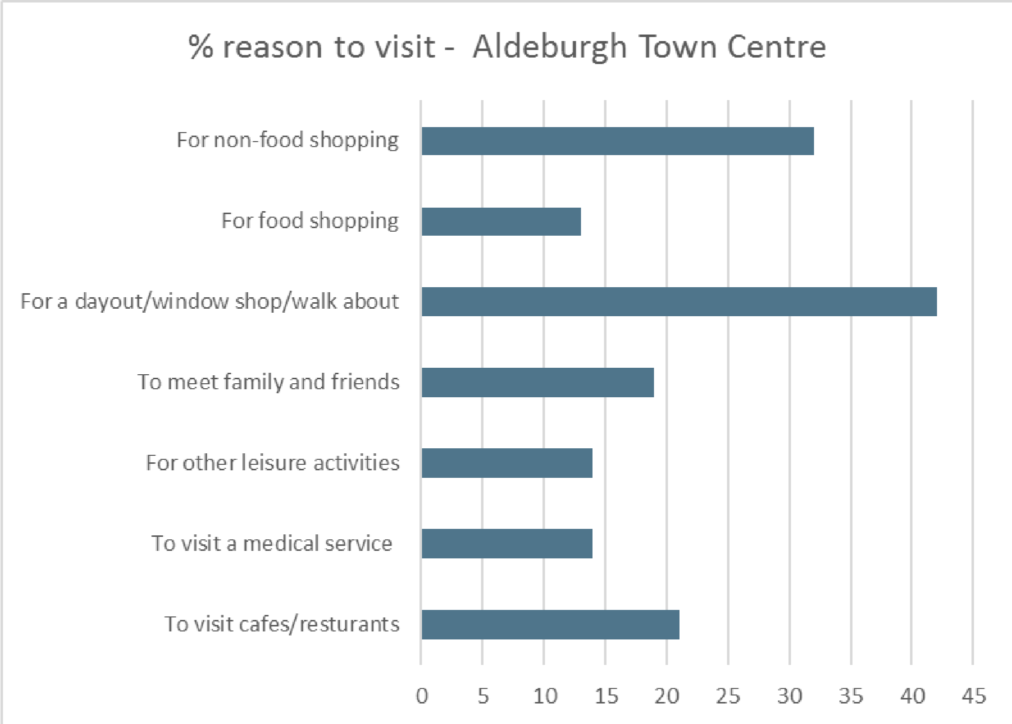
7.5.34 We are not aware of any issues in terms of crime within the town centre. We are also not aware of any concerns in relation to safety within the town centre. It is noted that no respondents from the NEMS household survey identified that improvements to the safety of the centre would encourage them to visit the town centre more often.

**Views and Behaviour**

7.5.35 The NEMS household survey provides information on the main reasons why respondents visit Aldeburgh Town Centre including what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

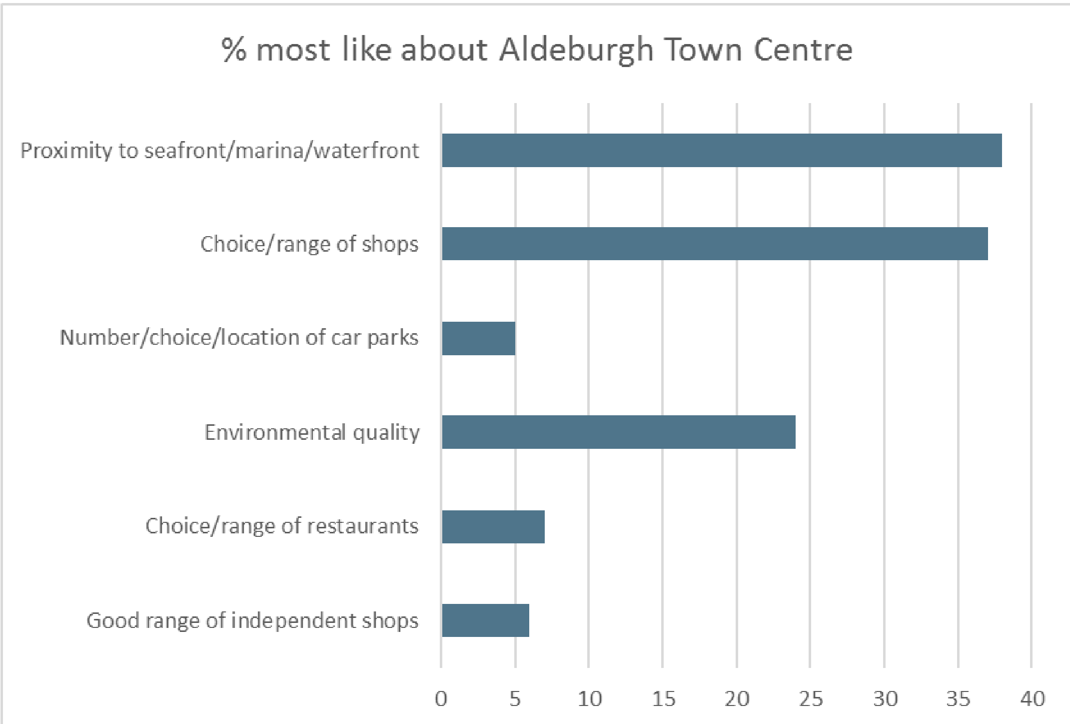
7.5.36 Figure 7.21 identifies that the main reason/s why respondents visit Aldeburgh Town Centre is for a day out/ window shopping (42%). Other frequently identified reason/s for visiting the town centre include for non-food shopping (32%) and to visit cafes and restaurants (21%).

**Figure 7.21: Main Reason for Visiting Aldeburgh Town Centre**




*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

**Figure 7.22: Main likes about Aldeburgh Town Centre**

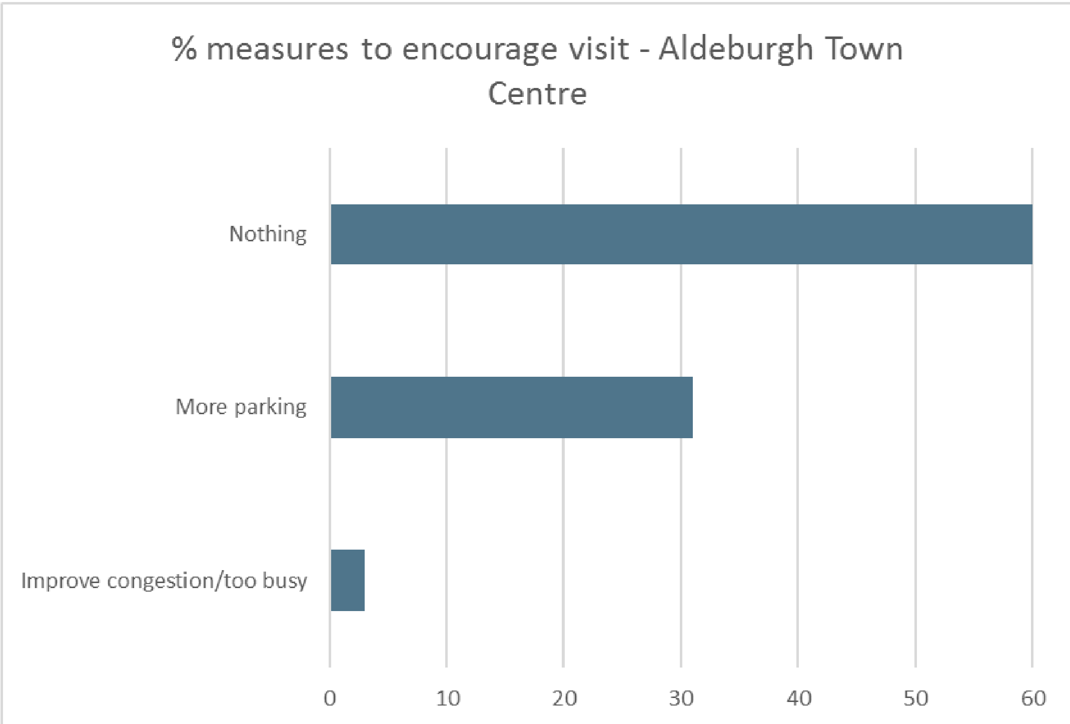



*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.5.37 Figure 7.22 shows what users of Aldeburgh Town Centre most like about the centre. It shows that a large proportion of respondents like the town centres proximity to the seafront (38%) and the choice and range of shops (37%). Approximately a quarter of respondents cited that they most like the town centre because of its environmental quality.

7.5.38 Measures that would encourage users of Aldeburgh Town Centre to visit more often are shown in Figure 7.23. The majority of respondents (60%) considered no measures would encourage them to visit more often suggesting that they were satisfied with the centre. Of all measures suggested by respondents that would encourage them to visit the centre more often 'more parking' was the most common one (31%).

**Figure 7.23: Measures that would encourage visits to Aldeburgh Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 31% of respondents visited the town centre more than once a fortnight.*

7.5.39 In terms of opinions of Aldeburgh Town Centre from key stakeholders, the following comments were made:

- The Co-Op and Post Office are key retail shops and services to benefit of community.
- The centre provides a good food and drink offer through restaurants, cafes and pubs.
- Car parking is poorly located.
- The centre is situated close to the seaside attracting day-trippers and holidaymakers.
- Aldeburgh Carnival is popular attracting visitors to the town centre.

- The centre has a strong arts/cultural offer.
- Retail provision is generally geared towards tourists.
- There is limited potential for future growth in the town centre.

7.5.40 Stakeholders suggestions of opportunities and ways to improve the town centre included: improving the marketing of the town centre for active tourism including cycle tourism and cultural wealth.

7.5.41 All views/feedback from key stakeholders are summarised in **Appendix C** of this study.

### Town Centre Environmental Quality

7.5.42 The environmental quality of the town centre is considered to be good. This is supported by its designation as a Conservation Area and the presence of a number of listed buildings.

7.5.43 Whilst High Street is not pedestrianised, the centre still provides a pleasant environment for residents/visitors. Of particular note outdoor café seating is provided in some places of the centre which positively contributes to town centre environmental quality.

7.5.44 It was also observed that shop fronts are well maintained and there was no evidence of any litter or vandalism.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.5.45 We consider that the principal strengths, weaknesses, opportunities and threats to Aldeburgh Town Centre are as follows:

- **Strengths and Opportunities**
  - The town centre is an attractive and popular tourist location.
  - The town centre is located adjacent to the seafront.
  - There is a very low vacancy level and a good churn rate.
  - As a result of its dual function as a local and visitor town centre, the centre provides a good level of quality food and drink outlets and premium brand retailers.
  - The Aldeburgh Cinema provides an important local cinema and arts/cultural facility.
- **Weaknesses and Threats**
  - The potential loss of local shops/ services as a result of an increase in services catering for the visitor market.
  - There is a lack of a convenience goods facility which is able to provide for a main food shop.

- There is a lack of car parking in the town centre which results in the majority of traffic driving through the town centre particularly during peak season.
- Due to the small number of vacant units there is limited opportunity for new businesses to open within the town centre.

7.5.46 Overall, when assessed against the relevant vitality and viability town centre health check indicators Aldeburgh Town Centre displays healthy levels of vitality and viability.

## 7.6 Framlingham Town Centre

7.6.1 Framlingham is located approximately 6 miles to the west of Saxmundham and 6 miles north of Wickham Market in the western part of the district. The town is of Anglo-Saxon origin and boasts a late 12th century castle which is a popular visitor attraction. The town also benefits from historic architecture resulting in its designation as a conservation area and many of the buildings being listed.

7.6.2 Framlingham Town Centre, providing just 62 retail and leisure units, is the smallest town centre in the district. Retail and leisure provision is concentrated around Market Hill, Church Street, Bridge Street, Well Close Square and Riverside. Market Hill is essentially the focus of the town centre with the area to the west of Riverside a more secondary location. The town centre provides services/facilities serving both a local and complimentary tourist role.

### Diversity of Uses and Representation

7.6.3 We have reviewed the diversity of retail and service uses accommodated in the town centre (by number, type and quantum of floorspace) and provide our findings below. A plan illustrating the location and use of each unit in the town centre (as defined by Experian Goad) is provided at **Appendix P**.

**Figure 7.24 Framlingham Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 4 | 6 | 4 | 6 | 9 |
| Comparison | 29 | 45 | 28 | 45 | 32 |
| Retail Service | 9 | 14 | 9 | 15 | 14 |
| Leisure Service | 9 | 14 | 11 | 18 | 24 |
| Finance & Business Service | 8 | 13 | 8 | 13 | 11 |
| Vacant | 5 | 8 | 2 | 3 | 11 |
| **TOTAL** | **64** | **100** | **62** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016.*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices.*

**Figure 7.25 Framlingham Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 1,880 | 24 | 1,880 | 24 | 16 |
| Comparison | 2,690 | 34 | 2,600 | 33 | 36 |
| Retail Service | 750 | 9 | 750 | 10 | 7 |
| Leisure Service | 1,190 | 15 | 1,500 | 19 | 25 |
| Financial & Business Service | 760 | 10 | 900 | 11 | 8 |
| Vacant | 720 | 9 | 210 | 3 | 9 |
| **Total** | **7,990** | **100** | **7,840** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016.*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices.*

Convenience Goods

7.6.4 Framlingham Town Centre contains 4 convenience retail units, consisting of some 1,880sq m gross floorspace. The main convenience offer is provided by a medium sized Co-op foodstore (1,034sq m net). The other 3 convenience units are small in size and consist of a confectionary store, butchers and deli. The Co-op foodstore is a key anchor facility for the centre and is accessible on foot from both Market Hill and Riverside.

7.6.5 The convenience goods offer within the town centre remains unchanged from 2015. Whilst the proportion of convenience goods units is below the UK average (6% compared to 9%), primarily as a result of the size of the Co-op foodstore the proportion of convenience goods floorspace in the centre is considerably higher than the UK average.

7.6.6 The centre also benefits from a market held twice a week at Market Hill on Tuesdays and Saturdays. The market includes a variety of convenience goods stalls from fruit and vegetables, bread, cakes and pastries, pickles, pies and fish.

Comparison Goods

7.6.7 The town centre provides 28 comparison goods units occupying around 2,600sq m (33%) of the total retail and leisure commercial floorspace. Comparison goods provision is provided in small units and includes shops selling clothing, jewellers, book, gifts and household goods. The centre also offers a chemist and optician to meet local needs. All of the comparison goods units are occupied by independent retailers with the exception of the 3 charity shops.

7.6.8 It is noted that since 2015 the comparison goods offer within the centre has decreased by just one unit (90sq m gross floorspace). Charlie Bear which offered children's clothing is no longer present within the centre and the shoe shop at Albert Place is now operated under the fascia 'Castle'.

7.6.9 When comparing the number of comparison units to the national average the town centre has a higher proportion of units (45% compared to 32%). However, because of the small size of the units, the proportion of comparison goods floorspace in the centre is below the UK average (33% compared to 36%).

Retail Services

7.6.10 Retail services within the town centre comprise 4 hairdressers and a beauty salon (260sq m in total) Additional retail service uses include a travel agent, dog groomer, and a post office.

7.6.11 The retail services present within the centre remain unchanged from 2015. The current proportion of units is broadly compared to the national average whilst in floorspace terms is higher than the national average (10% compared to 7%).

7.6.12 In addition to retail services the centre also provides non-retail uses including a dental surgery and a health centre.

Financial and Business Services

7.6.13 The town centre financial and business service sector is primarily provided by estate agents occupying over a third (340sq m) of the total 900sq m floorspace. In addition, there is also a Barclay's Bank, solicitors, business services and accountants.

7.6.14 The financial and business services within the town centre have remained stable in terms of unit numbers since 2015. However, the total floorspace occupied by such services has increased by some 140sq m. This is due to the relocation of Turner and Ellerby Accountants who were previously located at Market Hill and now occupy a larger unit on Church Street.

7.6.15 The current proportion of town centre units and floorspace in the financial and business services sector are both above the national averages.

Leisure Services

7.6.16 Leisure services within the centre makes up around 19% (1,500sq m) of the total floorspace and comprises 11 units. Of these 11 units, there are 8 cafe/restaurant facilities all of which are run by independent businesses. The centre also provides a public house and two take away establishments which cater for the evening economy.

7.6.17 Since 2015, the number of units in leisure service use has increased by 2 (+310sq m gross floorspace). This is due to the addition of Paddy and Scotts cafe (90sq m) and Bakers Cafe (220sq m) located at Well Close Square and Bridge Street.

7.6.18 The proportion of town centre floorspace in leisure service use (19%) is low compared to the national average (25%) as is the proportion of units (18%) when compared to the average of (24%).

7.6.19 In terms of hotel use, the centre benefits from a centrally located small (14 rooms) hotel: The Crown Hotel at Market Hill.

7.6.20 It is noted that over the last several years the town centre has seen the closure of two public houses: The White Horse, 27 College Road, and The Crown & Anchor, 4 Church Street. The White Horse public house remains vacant whilst the Crown & Anchor has been refurbished for residential use.

Arts and Culture

7.6.21 There are no arts and culture facilities located within the town centre itself. The main attraction in Framlingham is 12th century Framlingham Castle which is located a short 200 metre walk to the north east of the centre. The Castle is currently undergoing a £1.2 million upgrade to, *inter alia*, provide a new café and exhibition space.

## Vacancies

7.6.22 Framlingham Town Centre contains just 2 vacant units. The current vacancy level, both in unit and floorspace terms, is significantly lower than the national average. The two existing units are: unit opposite Lemon Tree Bistro, Church Street (10sq m gross floorspace), and; the White Horse pub, College Road (200sq m gross floorspace).

7.6.23 It is noted that the number of vacant units has declined since 2015 when 5 units were recorded as vacant suggesting a good demand/take up of units in the centre, when/if they become available.

## Retailer & Leisure Requirements

7.6.24 'The Requirements List' and Co-Star identify a single national multiple operator requirement for presence in Framlingham. The requirement is from Aldi for a convenience store of between 420sq m to 1,720sq m floorspace.

7.6.25 As previously noted 'The Requirements List' and Costar do not generally identify requirements from independent operators seeking presence in town centres. Framlingham Town Centre primarily consists of independent operators. The low vacancy level in the town centre suggests that there is a good level of demand from independent operators as and when a suitable unit comes available.

## Pedestrian Flows

7.6.26 There is currently no footfall/pedestrian count data available for the town centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall within the centre.

7.6.27 The highest level of pedestrian activity was recorded in Market Square during our visits where the majority of commercial units are located. Pedestrian footfall was also monitored to be high outside the Co-op foodstore and in the customer car park. Lower levels of footfall were monitored at Well Close Square/the western end of Bridge Street towards the eastern edge of the centre.

7.6.28 During peak holiday season we understand, primarily as a result of Framlingham Castle, the centre benefits from a significant uplift in pedestrian activity.

### Accessibility

7.6.29 Short term car parking is provided at Market Square on Monday, Wednesday to Friday (non-market days). Parking is restricted at Market Square on Tuesday's and Saturdays up to 3pm and 6pm respectively when the market trades. Further car parking is also provided at the Co-op foodstore providing approximately 80 spaces and a car park to the north off New Road which provides approximately 80 spaces. On-street parking is also provided on Church Street and other surrounding streets.

7.6.30 The town centre is also accessible by local bus service from Woodbridge, Worlingworth, Ipswich and surrounding areas. Bus stops are located to the north of the centre at Bridge Street and the west on College Road. Cycle parking was also available in the centre at the Co-op store.

### Perception of Safety

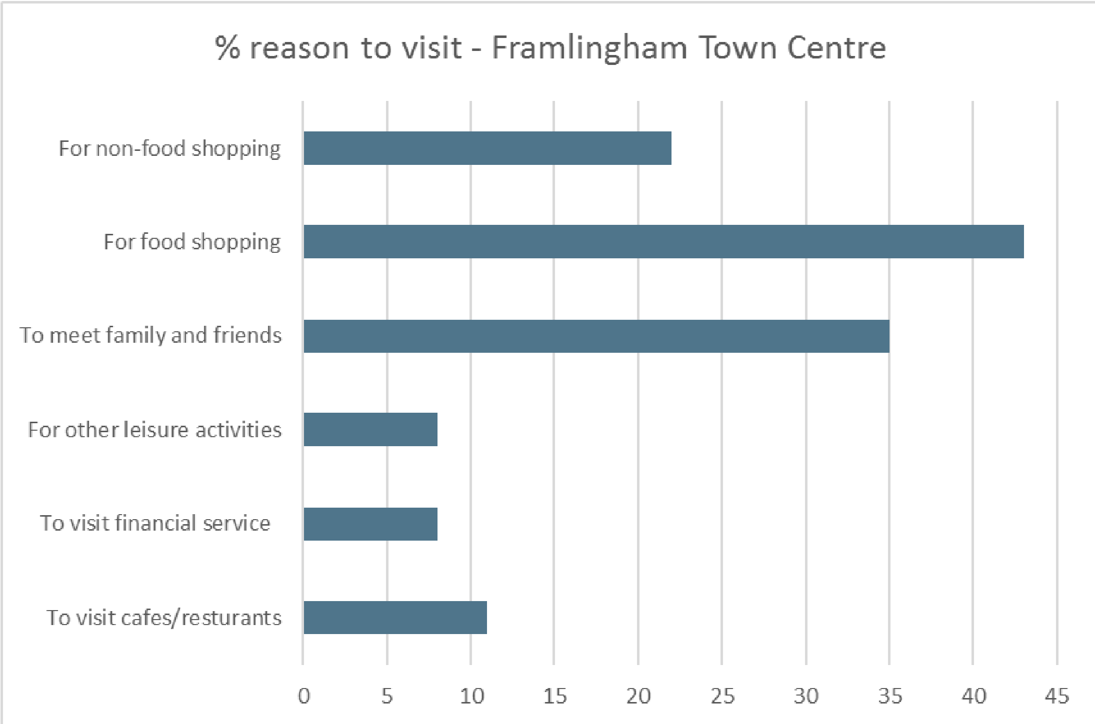
7.6.31 We are not aware of any issues in terms of crime within the town centre. We are also not aware of any concerns in relation to safety within the town centre. It is noted that no respondents from the NEMS household survey identified that improvements to the safety of the centre would encourage them to visit the town centre more often.

### Views and Behaviour

7.6.32 Information on the main reasons why respondents visit Framlingham Town Centre has been obtained from the NEMS survey, including what they most liked about the centre and what, if any, measures would encourage them to visit more often.

7.6.33 The main reason/s why respondents visit Framlingham Town Centre is for food shopping (43%). A high proportion of users also visited the town centre to meet family and friends (35%) and for non-food shopping (22%). In addition, some 11% of respondents stated the main reason/s for visiting the centre was to visit cafes and restaurants.

**Figure 7.26: Main Reason for Visiting Framlingham Town Centre**

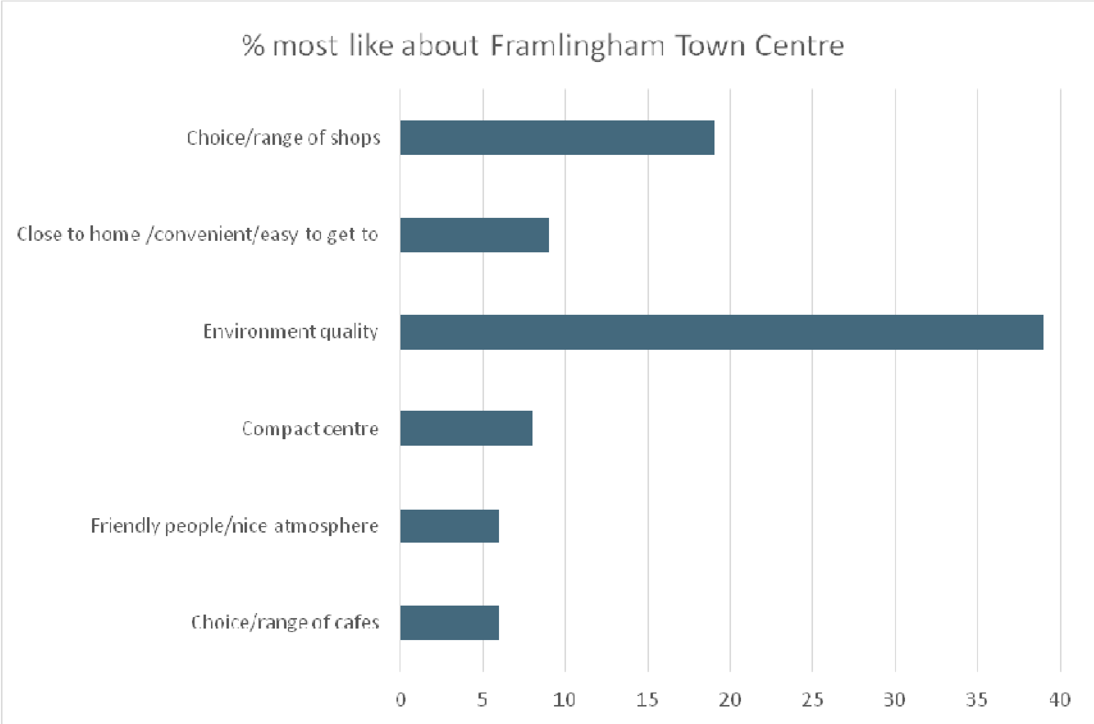



*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.6.34 Data was also obtained on what users of Framlingham Town Centre like most about the centre, the key findings are shown at Figure 7.27 overleaf. A high proportion of users of the town centre most like the environmental quality of the centre (39%). Users also most like the choice/ range of shops (19%). The fact that it is conveniently located/close to home (9%), and the compact nature of the centre (8%).

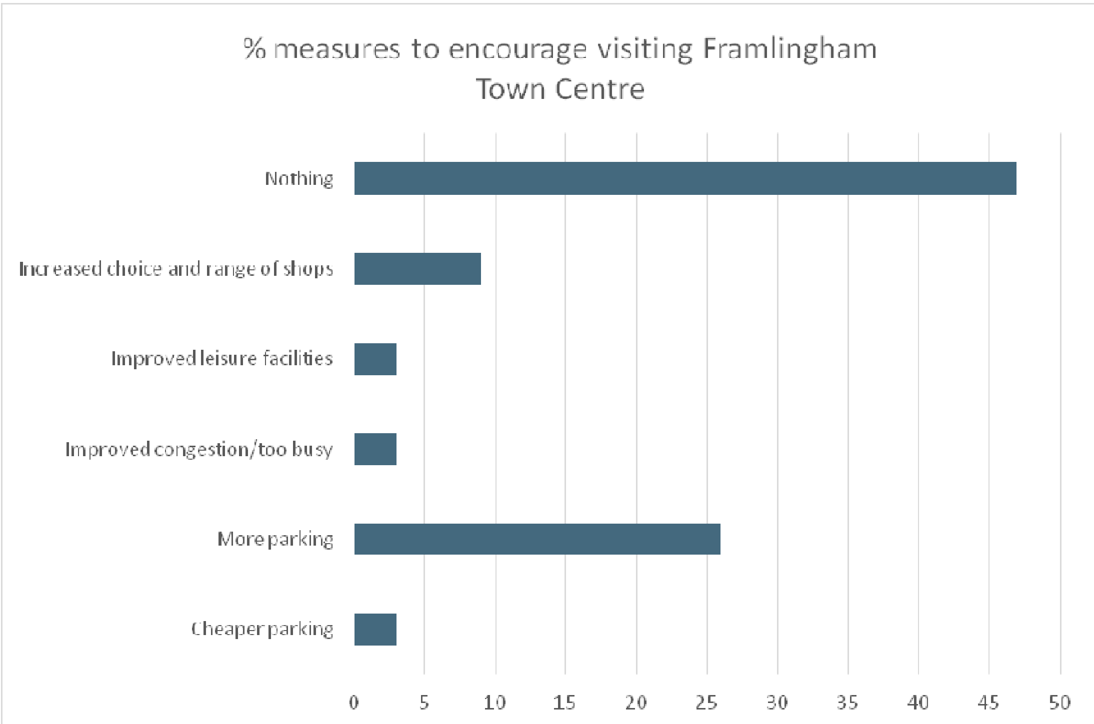
7.6.35 Figure 7.28 overleaf also sets out the most popular measures that would encourage users of Framlingham Town Centre to visit more often. Almost half of respondents (47%) stated that there was nothing that would encourage them to visit the centre on a more frequent basis, thereby implying that they were satisfied with the town centre. Respondents that did provide suggestions indicated that more parking (26%), an increased range and choice of shops (9%), an improved leisure facilities (3%), cheaper parking (3%), and congestion improvements (3%) would encourage them to visit the centre more often.

**Figure 7.27: Main likes about Framlingham Town Centre**




*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

**Figure 7.28: Measures that would encourage visits to Framlingham Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 61% of respondents visited the town centre more than once a fortnight.*

7.6.36 During the stakeholder workshop the following views on Framlingham Town Centre were recorded:

- There are a variety of nice food and drink facilities.
- The centre is situated close to Framlingham Castle.
- The annual Sausage Festival is a popular event attracting footfall to the town centre.
- There is limited car parking in the centre.
- Public transport cuts may reduce number/ frequency of bus services to the centre.

7.6.37 In addition, stakeholders suggestions with regard to opportunities and ways to improve the centre included:

- increasing linked visits between the Castle and town centre;
- improving broadband/ mobile phone connectivity; and
- increasing footfall in the centre by encouraging the growth of rural businesses in the town.

7.6.38 **Appendix C** contains a summary of all views/feedback from key stakeholders.

### Town Centre Environmental Quality

7.6.39 Framlingham provides an attractive historic market town centre. The environmental quality of the centre is reflected by its designation as a conservation area and the presence of a number of historic listed buildings. Market Hill is a particularly attractive part of the centre with, weather permitting, outdoor café/restaurant seating adding to centre vibrancy.

7.6.40 At the time of our visits the environmental quality of the western part of the town centre (Riverside/Well Close Square) was slightly marred by through traffic. The vacant White Horse public house also does not currently positively contribute to the vitality and viability of this part of the town centre.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.6.41 Following our surveys and town centre assessment, we consider that the principal strengths, weaknesses, opportunities and threats to the centre are as follows.

- **Strengths and Opportunities**
  - The town centre's location close to Framlingham Castle and the linked tourist/visitor trips.
  - The town centre provides an attractive environment with many historic buildings.

- The centre has a good convenience offer anchored by the Co-op foodstore and supported by smaller specialist independents.
- The centre has a very low vacancy rate with only two units currently unoccupied.
- A regular market is held twice weekly within the centre of the town.
- The vacant former White Horse Pub provides a potential opportunity for reuse/redevelopment.
- The Crown Hotel positively contributes to the vitality of the centre.

- **Weaknesses and Threats**
  - There is no train station within Framlingham which increases the reliance of tourists visiting Framlingham Castle and the town centre via car.
  - Parking within the centre is reasonably limited, particularly on market days.
  - The town centre has seen the loss of two public houses in recent years. Any further loss could negatively impact on the provision of services to meet the evening economy.

7.6.42 Overall, having regard to the foregoing assessment, Framlingham Town Centre is considered to be both vital and viable.

## 7.7 Leiston Town Centre

7.7.1 Leiston lies in the northern part of Suffolk Coastal District Council administrative area approximately 2 miles from the North Sea coast. Its town centre is compact in size with commercial units primarily located along High Street and Sizewell Road. The town centre currently provides approximately 72 retail and leisure commercial units together with other uses including Leiston Library, The Long Shop Museum, Leiston Community Centre, residential and religious institutions.

### Diversity of uses and Representation

7.7.2 The existing and 2015 retail and leisure commercial composition of the centre is set out in Figure 7.29 below.

**Figure 7.29: Leiston Town Centre - Diversity of Use for Commercial Units**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | No. | % | No. | % | % |
| Convenience | 8 | 11 | 7 | 10 | 9 |
| Comparison | 22 | 31 | 26 | 36 | 32 |
| Retail Service | 11 | 15 | 12 | 17 | 14 |
| Leisure Service | 14 | 19 | 16 | 22 | 24 |
| Finance & Business Service | 7 | 10 | 8 | 11 | 11 |
| Vacant | 10 | 14 | 3 | 4 | 11 |
| **TOTAL** | **72** | **100** | **72** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*

7.7.3 Figure 7.30 below also provides a breakdown of the current and 2015 retail and leisure commercial floorspace in the town centre.

**Figure 7.30 Leiston Town Centre - Diversity of Use for Commercial Floorspace**

| | 2015 | | 2017 | | UK Average |
|---|---|---|---|---|---|
| | Sq m | % | Sq m | % | % |
| Convenience | 2,590 | 27 | 1,600 | 17 | 16 |
| Comparison | 2,460 | 26 | 3,610 | 38 | 36 |
| Retail Service | 990 | 10 | 1,060 | 11 | 7 |
| Leisure Service | 1,940 | 20 | 2,100 | 22 | 25 |
| Financial & Business Service | 660 | 7 | 810 | 8 | 8 |
| Vacant | 980 | 10 | 390 | 4 | 9 |
| **Total** | **9,620** | **100** | **9,620** | **100** | **100** |

*Source: Experian Goad Survey, June 2015, Updated by WYG January 2017.*
*UK average is November 2016*
*Notes: Figures may not add due to rounding.*
*Excludes health centres, religious institutions, educational institutions, and offices*

Convenience Goods

7.7.4 Leiston Town Centre provides a reasonable convenience goods offer. The centre is anchored by a Co-op foodstore (1,000sq m net) which is supplemented by 6 other small convenience retailers including an independent butcher, greengrocer, delicatessen, a health food store and a Londis.

7.7.5 Since 2015 the convenience provision within the centre has decreased by one unit with Bubbles Bon Bon confectionary store having closed.

7.7.6 The current proportion of convenience units, in unit (10%) and floorspace (17%) terms, is slightly above the UK averages (9% and 16% respectively).

Comparison Goods

7.7.7 In total there are 26 units in the town centre that are occupied by comparison goods retailers providing some 3,610sq m of floorspace. The current proportion of units and floorspace in comparison goods use (36% and 38% respectively) is higher than the national average unit number (32%) and slightly higher than the floorspace (36%).

7.7.8 The majority (81%) of comparison goods retailers are independent retailers with national multiples retailers limited to Lloyds Pharmacy, St Elizabeth Hospice, Sue Ryder and Tofs Original Factory Shop.

7.7.9 There are a number of home and hardware shops in the town centre ranging from those specialising in carpets to haberdashery (totalling 1,200sq m gross floorspace). The centre also offers two chemists, an optician and a florist. The clothing and footwear offer is more limited and is predominantly provided through the recently opened Tofs Original Factory Shop.

7.7.10 The centre currently contains 6 charity shops (530sq m gross floorspace) representing 8% of the overall number of units in the centre. The current proportion of charity shops is notably higher than the UK average of 3%.

7.7.11 The number of comparison units within the town centre has increased by 4 since 2015 and circa 1,150sq m gross floorspace. This is through the addition of a second Leiston Carpets (60sq m), EEs Electrical Supplies (50sq m), Special Days Charity Shop (60sq m), East Anglia Children's Hospice Charity Shop (120sq m) and Tof's Factory Outlet (940sq m) (occupied part of Co-Op unit).

Retail Services

7.7.12 The retail services in the centre are provided through 12 units and 1,060sq m of floorspace. The current proportion of units and floorspace in the centre is above the national averages indicating that the town centre provides a good range of retail services.

7.7.13 Retail services currently include 8 hair and beauty salons alongside two travel agents/ tour operators and a tattoo parlour. The town centre also benefits from a Post Office located within the Londis on Sizewell Road.

7.7.14 In addition to the above retail services, the centre also contains a dental surgery, health centre and community centre providing key facilities to the local populous.

Financial and Business Services

7.7.15 The financial and businesses services within Leiston are provided through 8 units occupying 810sq m. The services comprise 4 estate agents, financial advisor, solicitor, Barclays Bank and Norwich and Peterborough Building Society.

7.7.16 The only change within the financial and business service sector since 2015 is the addition of Druce Estate Agents expanding into a second unit on High Street. This has resulted in the floorspace increasing by 160sq m.

7.7.17 When compared to the national average, the floorspace provision and number of units is identical to the UK average (8% and 11% respectively).

Leisure Services

7.7.18 The leisure provision consists of 16 units with 2,100sq m floorspace which includes Leiston Film Theatre (252 seat auditorium), 4 bars/ public houses and a betting office.

7.7.19 The town centre benefits from numerous take away facilities (7) which cater towards the evening market and provide a variety of options including Chinese, Indian, fish and chips and pizza outlets. A sub-way concession is also located within the Co-op foodstore. In terms of restaurants, the options are more limited with just 3 cafes and restaurants present.

7.7.20 All of the leisure operators/businesses within Leiston are independent with the exception of William Hill betting office.

7.7.21 The leisure services within the centre have increased by 2 units (160sq m floorspace) in total since 2015 with the addition of a Chinese takeaway and a pizza takeaway. Both the floorspace provision (22%) and number of units (22%) are just below the national average (25% and 24% respectively).

Arts and Cultural Facilities

7.7.22 The main arts and cultural facilities in Leiston Town Centre are:

- The Long Shop Museum, Main Street – An industrial museum dedicated to the history of Richard Garrett & Sons who manufactured agricultural machinery, steam engines and trolleybuses. The museum is closed during the winter.
- Leiston Film Theatre, High Street – In addition to showing films the film theatre also stages ballet, various entertainment shows, music performances and pantomimes.

**Vacancies**

7.7.23 Leiston Town Centre has a very low vacancy rate with only 3 units (390sq m gross floorspace) vacant at the time of our visits. The vacant units account for just 4% of the total town centre commercial retail and leisure floorspace, which is significantly below the national average of 9%. The vacant units are 13-15 High Street (310sq m), 42 High Street (50sq m) and 22A Sizewell Road (30sq m).

7.7.24 Since 2015 there has been a significant reduction (-7) in vacant units in the town centre. Vacant floorspace has also significantly reduced from 980sq m to 390sq m gross floorspace.

### Retailer Requirements

7.7.25 At the current time there are no recorded requirements ('The Requirements List' and Costar) from national multiple retail and leisure operators to locate within Leiston Town Centre. Notwithstanding this, it is clearly evident, having regard to the recent take up of vacant units in the centre, that there is a good demand from independent retailers for units in the town centre.

### Pedestrian Flows

7.7.26 There is currently no footfall/pedestrian count data available for the town centre. Accordingly, during our survey and visits of the centre in January 2017 and February 2017, we have observed pedestrian activity and considered the levels of footfall within the centre.

7.7.27 During our visits of the town centre footfall was monitored to be highest in the vicinity of the Co-op store with good levels also observed in the northern part of the centre in the vicinity of Barclays Bank. Lower levels of activity were recorded at the periphery of the centre, along the eastern part of Sizewell Road and southern part of the High Street.

### Accessibility

7.7.28 The centre is considered to be reasonably accessible by bus with bus stops located on High Street and also Main Street providing services to Ipswich, Halesworth and Aldeburgh.

7.7.29 The town centre is quite isolated in terms of its accessibility from the main road network. Notwithstanding this, the centre provides a good provision of car parking. The main parking facilities are:

- Co-op foodstore (circa 130 spaces);
- High Street Car Park (circa 70 spaces)
- Sizewell Road Car Park (circa 40 spaces)
- Main Street Car Park (circa 8 spaces); and
- Platers Walk Car Park (circa 40 spaces).

7.7.30 The centre does not however benefit from a railway station, with the closest being in Saxmundham approximately 4 miles to the west.

### Perception of Safety

7.7.31 Leiston Town Centre is considered to generally provide a safe shopping environment. We are not aware of any particular safety and crime issues in the town centre itself. We note that the crossroad junction at High Street, Sizewell Road and Cross Street creates an obstacle for pedestrians to navigate when shopping within the centre but are not aware of any significant safety issues with the junction.

7.7.32 Leiston has recently signed up to the Town Pastors scheme in January 2017, which is currently active in Woodbridge and Felixstowe town centre.

### Views and Behaviour

7.7.33 Information has been obtained on the main reasons why respondents visit Leiston Town Centre from the NEMS survey, which includes what they most liked about it and what, if any, measures would encourage them to visit the centre more often.

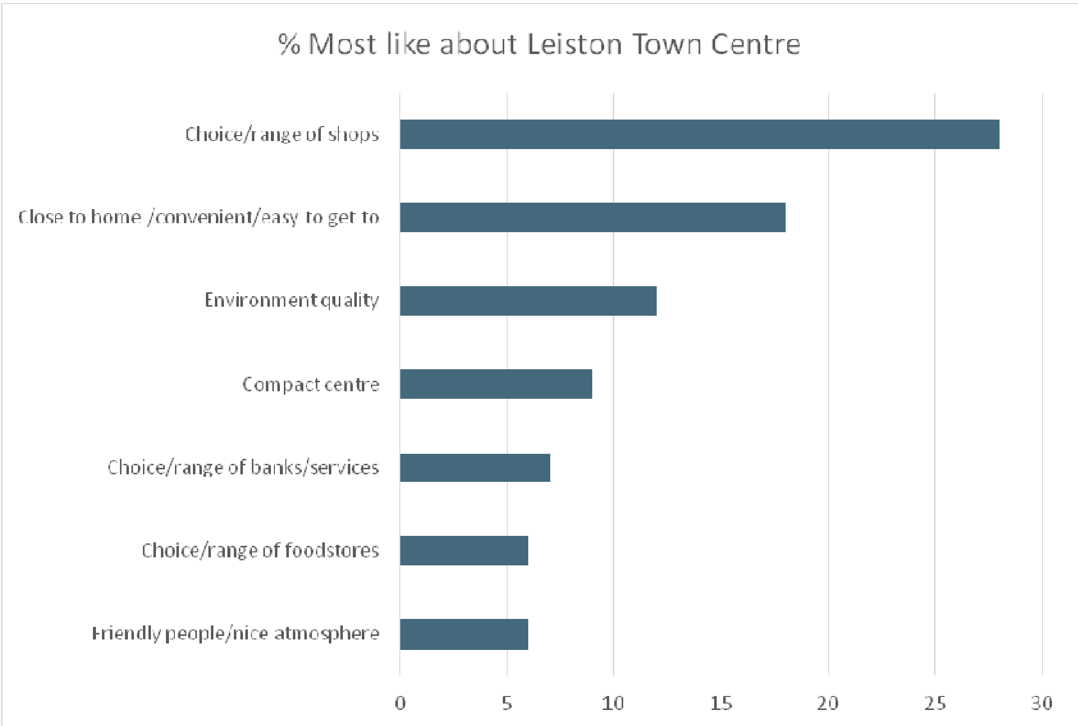
7.7.34 As shown in Figure 7.31 the most popular reason/s why respondents visit Leiston Town Centre is for food shopping (70%) and non-food shopping (51%). 14% of respondents main reason/s for visiting the town centre is for financial and business services, 8% visit for the cinema and also 7% for a day out/window shopping, and 7% to meet family and friends.

7.7.35 The main likes of Leiston Town Centre from its users are detailed at Figure 7.32 overleaf. Respondents most like the choice/ range of shops (28%), the location of the centre being close to home/ convenient to access (18%) and the quality of the environment (12%). Other responses on likes included: the centre being compact (9%), the choice/ range of banks and services (7%), the choice/range of foodstores (6%) and the nice atmosphere of the centre/friendly people (6%).

**Figure 7.31: Main Reason for Visiting Leiston Town Centre**


*Source: Q33a, 33b, and 33c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

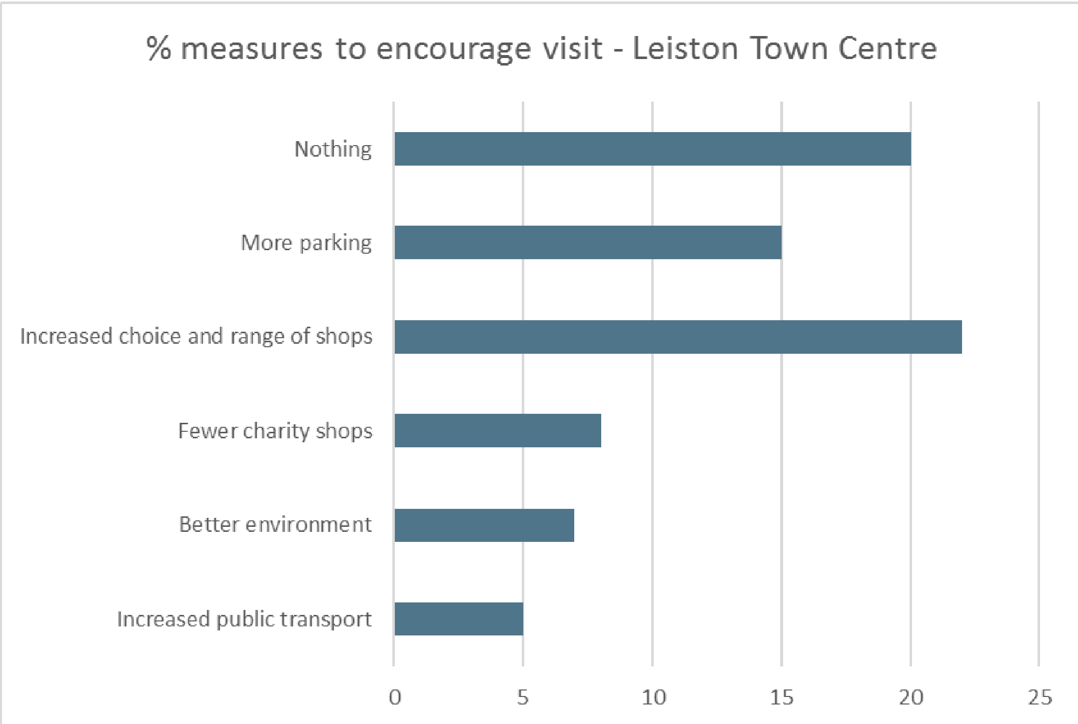
**Figure 7.32: Main likes about Leiston Town Centre**




*Source: Q34a, 34b, and 34c (1st, 2nd & 3rd mention combined), NEMS Household Survey*

7.7.36 Figure 7.33 highlights the measures that would encourage users of Leiston Town Centre to visit more often. Users indicated that increased choice and range of shops (22%), more parking (15%), less charity shops (8%), an improved environment (7%), and increased public transport (5%) would encourage them to visit the centre more often. It is noted that 20% of user's state that nothing would encourage them to visit more often, suggesting that some users of Leiston Town Centre are satisfied with the centre. The proportion of respondents who appeared to be satisfied with the centre is lower when compared to the other market towns.

**Figure 7.33: Measures that would encourage visits to Leiston Town Centre more often**




*Source: Q35a, 35b, and 35c (1st, 2nd & 3rd mention combined), NEMS Household Survey*
*Notes: Of those respondents that said "nothing" some 61% of respondents visited the town centre more than once a fortnight.*

7.7.37 In terms of our engagement with key stakeholders a number of views on Leiston Town Centre included:

- The opening of the Tofs Original Factory Shop has help diversify the retail offer in the town centre.
- The town centre provides a range of services.
- There are a number of leisure facilities within/close to the town centre including a cinema and swimming pool.
- The town is not on the train line and therefore the centre is heavily reliant on being accessed by car.
- The Long Shop Museum is an important cultural facility, as is the nearby Leiston Abbey.
- Further development at Sizewell will impact housing market and local economy.

- The layout of centre results in traffic dominating the environment.

7.7.38 Generally stakeholders consider that the town centre is performing well with the redevelopment of the Land at High Street Site (identified in the Leiston Neighbourhood Development Plan) for housing, retail and community uses providing a key opportunity to improve the range of services and the environment of the town centre.

7.7.39 A summary of all views/feedback from key stakeholders is provided at **Appendix C.**

### Town Centre Environmental Quality

7.7.40 The environmental quality of Leiston Town Centre is of slightly lower quality than some of the other Market Towns which have greater tourism attraction. The centre's environmental quality is considered to be marred by through traffic along both High Street and Sizewell Road. In places, the impact of the through traffic is increased by narrow pavements.

7.7.41 There is a mix of architectural quality and building styles in the centre but shop fronts are generally well maintained. Main Street, in the vicinity of the Library is particularly attractive and parts of High Street where traditional shop fronts have been retained positively contribute to environmental quality.

7.7.42 Whilst the centre lacks street furniture it was noted that there was little evidence of graffiti or litter.

### SWOT Assessment (Strengths, Weaknesses, Opportunities, Threats)

7.7.43 When assessed against relevant vitality and viability health check indicators Leiston Town Centre is considered to be healthy. Whilst the environmental quality of the centre could be improved demand from retailer/leisure operators is evident from the low vacancy level and the recent 'take up' of a number of vacant units.

7.7.44 We consider that the principal strengths, weaknesses, opportunities and threats to Leiston Town Centre are as follows:

- **Strengths and Opportunities**
  - The centre provides a reasonable convenience goods offer. However, whilst the Co-op store does meet some resident's main food requirements a high proportion are travelling to Saxmundham for their main food shop.
  - The centre has a low vacancy rate.
  - Leiston Cinema is an important local leisure service.

- The potential development of Land at High Street (identified in the Leiston Neighbourhood Development Plan) for housing, retail and community uses and opportunities to enhance pedestrian circulation.

- **Weaknesses and Threats**
  - The clothing and footwear offer within the town is limited.
  - There are a high proportion of charity shops in the centre.
  - The environmental quality is slightly marred by through traffic. This impact is increased in parts by narrow pavements.
  - Further development at Sizewell and associated threats.
  - Lack of a focal point in advance of town centre site being promoted in the neighbourhood plan.

## 7.8 Wickham Market District Centre

7.8.1 Wickham Market is located to the west of the A12 trunk road and approximately 5 miles to the north of Woodbridge. Almost the entirety of the district centre is covered by a Conservation Area.

7.8.2 The district centre boundary (as defined in the Site Allocations and Area Specific Policies DPD) extends from George Lane in the north along to Broad Road, around Market Hill to the south of High Street just before Vinery Close and back up High Street, around Church Terrace and All Saints Church and back along Brown Lane.

7.8.3 Given its small size there is not an Experian Goad Land Use Plan available for Wickham Market District Centre. As such, we have carried out our own review of the retail and leisure units within the centre and grouped them as per the Goad commercial retail and leisure categories.

### Diversity of Uses and Representation

7.8.4 Overall, Wickham Market District Centre provides some 27 retail and leisure units. It primarily provides local services for the immediate population. With the exception of Co-op and McColls all of the retailer/leisure operators are independents.

- <u>Convenience Goods</u> - Provided through 4 units comprising Co-op foodstores (390 sq m net), McColls, off-licence and butchers. The McColls, off-licence and butchers are located at Market Hill with the Co-op located to the south of the centre off High Street.
- <u>Comparison Goods</u> – Limited to 5 units; a pharmacy, hardware and garden shop, charity shop, pop up vintage store and Inspirations.

- Retail Services – Provided in 6 units. Includes a post office, beauty salon, hairdressers, holistic wellbeing and tattooist.
- Financial Services – There are no financial and business services in the centre albeit there is a ATM cash machine at the Co-Op store.
- Leisure Services – Comprises 6 units including two cafes/ tea rooms, an Indian restaurant, Chinese restaurant, fish and chips takeaway and Wickham Market Royal British Legion Club. A Subway concession is also located within the Co-op foodstore.
- Other uses – The district centre also contains a village hall, medical centre, veterinary practice, library and two Churches.

7.8.5 The household survey results show that the Co-op, with dedicated car parking, serves the nearby rural communities including the other side of the A12 towards the coast between the Deben and Alde estuaries.

**Vacancies**

7.8.6 The centre currently contains 5 vacant units which represents 19% of the total number of retail/ commercial units in the district centre. Whilst all of the vacant units are situated on The Hill they are small in size and are not particularly visually destructive to the centre.

**Pedestrian Flows**

7.8.7 At the time of our visits the highest levels of activity were monitored in the vicinity of McColls on The Hill and to the south of the centre near the Post Office and Co-Op. Healthy levels of pedestrian activity was also monitored in the vicinity of the medical centre.

**Accessibility**

7.8.8 The district centre is easily accessible by car via the A12 trunk road. Car parking is available at both short and long-stay pay and display car parks at The Hill. Additional parking is also provided at the medical centre and at the Co-op foodsotre in the southern part of the centre. The centre has good road access from the nearby A12 as well as convenient parking provision.

7.8.9 Bus stops are located at The Hill providing reasonably frequent northbound services to Saxmundham, Aldeburgh and Framlingham and southerly services to Woodbridge and Ipswich. The district centre is also easily accessed on foot from the surrounding residential area.

## Environmental Quality

7.8.10 As noted previously the district centre is designated as a conservation area. It is therefore not surprising that the environmental quality of the centre pleasant with The Hill providing a particularly attractive environment. Street furniture, wide pavements and trees/landscaping further enhance the quality of the district centre's environment.

## Summary

7.8.11 Wickham Market is an attractive district centre providing local services/facilities for the immediate population. Whilst the centre lacks any financial services and contains a number of vacant units it demonstrates good levels of vitality and viability when assessed against other health check indicators.

# 8.0 Retail Needs Assessment

## 8.1 Introduction

8.1.1 This section of the study provides an assessment of retail needs. It firstly considers convenience and comparison goods quantitative needs (retail capacity) before reviewing qualitative retail needs having regard to any identified deficiencies / 'gaps' in existing provision.

8.1.2 As part of the quantitative needs assessment the current population and available expenditure (for both convenience and comparison goods) across the Study Area is reviewed and assessed.

## 8.2 Retail Capacity

8.2.1 We have examined the need for new convenience and comparison goods floorspace over the five year reporting periods to 2036 (i.e. at 2021, 2026, 2031). At the outset, it is important to note that an assessment in the long term should be viewed with caution, due to the obvious difficulties inherent in predicting the performance of the economy and shopping habits over time.

8.2.2 A complete series of quantitative retail capacity tables are provided at **Appendices I-K** to provide further detail in terms of the step-by-step application of our quantitative assessment methodology.

### Population & Retail Expenditure

<u>Population</u>

8.2.3 The base population (2015) within each postal code sector has been calculated using Experian Micromarketer MMG3 data (February 2017). The baseline population data takes into consideration the findings of the 2011 Census release. In agreement with instructing Councils the population has been projected forward using relevant projections for each authority area. For Ipswich, Suffolk Coastal, Babergh, Mid Suffolk and Waveney administrative areas population projection figures have been derived from the 'Suffolk District OAN Population Profiles provided by Ipswich Borough Council. Where a zone extends across administrative areas relevant district/borough population projections have been applied to each part of the zone.

8.2.4 It should be noted that Zone 5 extends into Colchester and Tendring administrative areas and Zone 6 into St Edmundsbury administrative area. Population projections for each authority area have been derived from the relevant retail study undertaken on behalf of the Councils and applied to the base population for the relevant part of each zone.

8.2.5 The defined Study Area is estimated to contain a resident population of approximately 465,542 people at 2017 rising to 524,167 people at 2036. This represents an increase in population within the Study Area of 58,625 people (equating to an increase of 12.6%) between 2017 to 2036.

8.2.6 Figure 8.1 provides a detailed breakdown of the forecast population change within each survey zones in each of the reporting period to 2036.

**Figure 8.1: Study Area Population by Survey Zone (2017-2036)**

| Zone | 2017 | 2021 | 2026 | 2031 | 2036 |
|---|---|---|---|---|---|
| 1 | 38,337 | 39,512 | 40,857 | 41,955 | 42,968 |
| 2 | 34,473 | 35,493 | 36,701 | 37,687 | 38,597 |
| 3 | 53,642 | 54,971 | 56,558 | 57,981 | 59,462 |
| 4 | 39,220 | 40,380 | 41,755 | 42,877 | 43,912 |
| 5 | 89,099 | 91,780 | 95,179 | 98,578 | 102,307 |
| 6 | 59,151 | 60,966 | 63,318 | 65,788 | 68,417 |
| 7 | 27,366 | 28,234 | 29,359 | 30,552 | 31,813 |
| 8 | 22,018 | 22,530 | 23,172 | 23,852 | 24,628 |
| 9 | 10,496 | 10,691 | 10,927 | 11,177 | 11,483 |
| 10 | 29,459 | 30,006 | 30,667 | 31,370 | 32,229 |
| 11 | 11,119 | 11,325 | 11,575 | 11,840 | 12,165 |
| 12 | 7,539 | 7,698 | 7,895 | 8,104 | 8,349 |
| 13 | 6,533 | 6,669 | 6,837 | 7,015 | 7,225 |
| 14 | 11,854 | 12,074 | 12,340 | 12,623 | 12,969 |
| 15 | 9,848 | 10,030 | 10,252 | 10,486 | 10,774 |
| 16 | 15,348 | 15,666 | 16,086 | 16,474 | 16,870 |

*Source: Table 1, Appendix I*

Expenditure

8.2.7 In order to calculate per capita convenience and comparison goods expenditure, we have again utilised Experian Micromarketer G3 (MMG3) data which provides detailed information on local consumer expenditure which takes into consideration the socio-economic characteristics of the local population. Experian is a widely accepted source of expenditure and population data and is regularly used by WYG in calculating retail capacity.

8.2.8 The base year for the Experian expenditure data is 2017. Per capita growth forecasts have been derived from Experian Retail Planner Briefing Note 14, which was published in November 2016. Appendix 3 of the Retail Planner Briefing Note identifies the following national annual growth forecasts for convenience and comparison goods which inform our assessment.

**Figure 8.2: Expenditure Growth Forecasts**

| Year | Convenience (%) | Comparison (%) |
|---|---|---|
| 2017 | -0.1 | 1.5 |
| 2018 | -0.9 | 0.9 |
| 2019 | -0.1 | 2.1 |
| 2020 | 0.0 | 2.9 |
| 2021 | 0.2 | 3.3 |
| 2022 | -0.1 | 3.4 |
| 2023 | -0.1 | 3.4 |
| 2024 | 0.0 | 3.3 |
| 2025 | 0.0 | 3.1 |
| 2026 | 0.0 | 3.1 |
| 2027 | 0.1 | 3.1 |
| 2028 | 0.1 | 3.0 |
| 2029 | 0.0 | 3.1 |
| 2030 | 0.1 | 3.2 |
| 2031 | 0.2 | 3.4 |
| 2032 | 0.1 | 3.2 |
| 2033 | 0.2 | 3.3 |
| 2034 | 0.2 | 3.3 |
| 2035 | 0.2 | 3.4 |

*Source: Appendix 3, Retail Planner Briefing Note 14 (November 2016)*

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8.2.9 For convenience goods, Experian forecasts growth to remain subdued with a longer term forecast per head growth of +0.1% per annum. For comparison goods, Experian identify growth to increase from 1.5% per annum to 3.4% per annum in the short term (2017-2022) with growth rates ranging between 3.0-3.4% per annum in the medium and longer term (2022-2036).

8.2.10 Growth in expenditure forecast in the longer term (beyond the next ten years) should be treated with caution given the inherent uncertainties in predicting the economy's performance over time. Assessments of this nature should therefore be reviewed on a regular basis in order to ensure that forecasts over the medium and long term are reflective of any changes to relevant available data.

8.2.11 Experian Retail Planner Briefing Note 14 also provides a forecast as to the proportion of expenditure which will be committed through special forms of trading (comprising 'non-store retailing', such as internet sales, TV shopping and so on) over the reporting period. In accordance with retail capacity assessment standard practice we have 'stripped out' expenditure which survey respondents indicated was committed via special forms of trading and have made an allowance derived from Experian's recommendation.

8.2.12 In considering special forms of trading, it should be noted that many products which are ordered online are actually sourced from a physical store's shelves or stockroom (particularly in the case of convenience goods). Accordingly, expenditure committed in this manner acts to support stores and should be considered 'available' to tangible retail destinations.

8.2.13 Accordingly, in order not to overstate the influence of expenditure committed via special forms of trading, our approach is based on Experian's 'adjusted' figure (provided at Appendix 3 Retail Planner Briefing Note 14) which makes an allowance for internet sales which are sourced from stores. The proportion of expenditure committed through special forms of trading cited below at Figure 8.3 is 'stripped out' of the identified expenditure as it is not available to stores within the Study Area.

**Figure 8.3: Special Forms of Trading Forecasts**

| Year | Convenience (%) | Comparison (%) |
|---|---|---|
| 2017 | 3.2 | 13.8 |
| 2021 | 3.9 | 15.6 |
| 2026 | 4.6 | 16.1 |
| 2031 | 5.0 | 16.3 |
| 2036 | 5.3 | 16.5 |

*Source: Appendix 3, Retail Planner Briefing Note 14 (November 2016)*

8.2.14 Based on the above growth rates and special forms of trading allowances, it is possible to produce expenditure estimates for each survey zone under each population growth scenario at 2017, 2021, 2026, 2031 and 2036. In doing so, our assessment takes into account both per capita retail expenditure growth and population change.

Convenience Goods Expenditure

8.2.15 Taking into consideration the above increases in population and per capita expenditure, it is estimated that, at 2017, the resident population of the Study Area generates some £963.9m of convenience goods expenditure. Available convenience goods expenditure is then forecast to increase to £1,063m at 2036, which represents an increase of £99.0m (or 10.3%) between 2017 and 2036.

**Figure 8.4: Total Available Study Area Expenditure – Convenience Goods (£m)**

| 2017 (£m) | 2021 (£m) | 2026 (£m) | 2031 (£m) | 2036 (£m) | Growth 2017-2021 (£m) | Growth 2017-2026 (£m) | Growth 2017-2031 (£m) | Growth 2017-2036 (£m) |
|---|---|---|---|---|---|---|---|---|
| 963.9 | 971.7 | 995.8 | 1,026 | 1,063 | 0.8 | 3.3 | 6.4 | 10.3 |

*Source: Table 3, Appendix I*
*2015 Prices*

Comparison Goods Expenditure

8.2.16 For comparison goods, Figure 8.5 sets out our estimation that the resident population of the Study Area will generate some £1,452m of comparison goods expenditure at 2017. Available comparison goods expenditure is then forecast to increase to £2,835m at 2036, which represents an increase of £1,388m (or 95.6%) between 2017 and 2036.

8.2.17 Whilst the identified expenditure increase is very significant in the long term, the rate of growth is more modest than that previously achieved, principally because of the expectation that an ever increasing proportion of comparison goods expenditure will be committed through special forms of trading (most particularly, internet shopping).

**Figure 8.5: Total Available Study Area Expenditure – Comparison Goods (£m)**

| 2017 (£m) | 2021 (£m) | 2026 (£m) | 2031 (£m) | 2036 (£m) | Growth 2017-2021 (£m) | Growth 2017-2026 (£m) | Growth 2017-2031 (£m) | Growth 2017-2036 (£m) |
|---|---|---|---|---|---|---|---|---|
| 1,452 | 1,604 | 1,948 | 2,335 | 2,838 | 152.1 | 495.8 | 886.1 | 1,388 |

*Source: Tables 17a-e, Appendix I*
*2015 Prices*

8.2.18 For the purposes of this Study, comparison goods expenditure has been divided into 12 subcategories: 'DIY', 'Large Electrical Household Items', Small Electrical Items', and 'Furniture, Carpets & Floor Coverings' (these four categories collectively being referred to as bulky goods) and, 'Clothing & Footwear', 'CDs, DVDs and Books', 'Furnishings & Household Textiles', 'Health and Beauty/Chemist Goods', 'Small Household Goods', 'Clocks Jewellery & Watches', 'Pets and Pet related Products' and 'Toys, Games, Bicycles and Recreational Goods' (collectively referred to as non-bulky goods). The proportion of expenditure directed to each sub-category is estimated by Experian on a zonal basis.

8.2.19 In considering the above, it should be noted that if an excess of expenditure manifests itself within the Study Area, this does not necessarily translate directly into a requirement for additional floorspace. In assessing quantitative need, it is also necessary to take account of:

- Existing development proposals;
- Expected changes in shopping patterns; and
- The future efficiency of retail floorspace.

### Capacity Formula

8.2.20 For all types of retail capacity assessment, the conceptual approach is identical, although the data sources and assumptions may differ. The key relationship is Expenditure (£m) (allowing for population change and retail growth) less Turnover (£m) (allowing for improved 'productivity') equals Surplus or Deficit (£m).

8.2.21 **Expenditure (£m)** – The expenditure element of the above equation is calculated by taking the population within the defined catchment and then multiplying this figure by the average annual expenditure levels for various forms of retail spending per annum. The expenditure is estimated with reference to a number of factors, namely:

- Growth in population;
- Growth in expenditure per person per annum; and
- Special Forms of Trading (e.g. internet shopping, catalogue shopping and so on).

8.2.22 **Turnover (£m)** – The turnover figure relates to the annual turnover generated by existing retail facilities within the Study Area. The turnover of existing facilities is calculated using Mintel Retail Rankings and Verdict UK Grocery Retailers reports – independent analysis which lists the sales densities for all major multiple retailers.

8.2.23 **Surplus/Deficit (£m)** – This represents the difference between the expenditure and turnover figures outlined above. A surplus figure represents an effective under provision of retail facilities within the Study Area (which, all things being equal, would suggest that additional floorspace could be supported), whereas a deficit would suggest a quantitative overprovision of retail facilities.

8.2.24 Although a surplus figure is presented in monetary terms, it is possible to convert this figure to provide an indication of the quantum of floorspace which may be required. The level of floorspace will vary dependent on the type of retailer proposed and the type of goods traded. For example, in the case of comparison goods, non-bulky goods retailers tend to achieve higher sales densities than bulky goods retailers. However, within the bulky goods sector itself there is significant variation, with electrical retailers tending to have a much higher sales density than those selling DIY or furniture goods.

### Convenience Goods Capacity - Ipswich

8.2.25 In order to ascertain the likely need for additional convenience goods floorspace in Ipswich and the Suffolk Coastal District, it is first necessary to consider the performance of the current provision. Given the geography of the authority areas and their reasonably strong retention of convenience goods expenditure, it is assumed that the future convenience goods expenditure available to both Ipswich and Suffolk Coastal areas will be commensurate with their current market share.

8.2.26 Figure 8.6 sets out the current convenience goods trading position in Ipswich compared against the 'benchmark' (or anticipated) turnover of existing convenience goods floorspace and projects this forward to 2036. The benchmark turnover differs for each operator based on its average turnover per square metre throughout the country. Although robust up-to-date information is available in terms of the convenience goods floorspace provided by large foodstores, it can be more difficult to quantify the extent of local convenience provision as there is no single comprehensive database to rely upon. Where we have been unable to verify the exact quantum of floorspace provided by existing smaller scale convenience stores in the two local authority areas, we have assumed that stores are trading 'at equilibrium' (i.e. the survey derived turnover equates to the expected level of turnover).

8.2.27 Our assessment is based upon a 'goods based' approach, which disaggregates expenditure by category type, and it is important to recognise that major foodstore operators generally sell an element of non-food goods such as books, compact discs, clothing and household goods. To account for this, we have assessed the split in convenience/comparison goods provision in each store having regard to our own observations during store visits and the typical convenience/comparison floorspace ratio published by retail data provider, Verdict. This provides an indication of the likely sales area dedicated to the sale of convenience goods at each store.

8.2.28 Our assessment identifies that taking all convenience goods retail facilities in Ipswich Borough together, the expected turnover of provision is £272.9m per annum at 2017, which is lower than the identified survey-derived turnover of £278.2m. This suggests that, taken cumulatively, existing convenience goods provision in the Ipswich administrative area is marginally 'overtrading' when compared to its expected turnover. Accordingly, there is a small expenditure surplus which could support additional food retail provision.

8.2.29 It should also be noted that there are instances where specific facilities trade very strongly or relatively poorly. For example, the Aldi store at Felixstowe Road District Centre has an estimated convenience goods benchmark turnover of £9.2m, but turns over an estimated £28.5m of convenience goods expenditure. Another Aldi store, at Meredith Road District Centre, has an estimated convenience goods benchmark turnover of £9.5m, but turns over an estimated £16.2m of convenience goods expenditure. By way of contrast, the convenience goods turnover of the Morrison's store, Sproughton Road and the Asda, Whitehouse Industrial Estate, respectively trade £12.7m and £6.0m less than their respective benchmark turnovers of £39.4m and £40.0m.

8.2.30 The individual performance of each of the main convenience goods facilities is identified at Table 4 of **Appendix J**.

8.2.31 In order to appraise the need for additional convenience goods retail floorspace, it is necessary to consider how the performance of stores will be affected by future growth in expenditure. Accordingly, Figure 8.6 also sets out the anticipated increases in expenditure which will be available to the Ipswich's convenience goods retail facilities, assuming that the current survey derived market share is maintained. It is also assumes that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 14. Following this exercise, we then consider the effect extant planning commitments will have in addressing any identified convenience goods shopping needs under each of the growth scenarios.

8.2.32 Figure 8.6 indicates that, after taking into consideration future increases in both population and expenditure, an effective convenience goods expenditure surplus of £8.6m is identified at 2017. By 2021, after increases in population and expenditure are considered against changes in floorspace productivity, we estimate that there will be an expenditure surplus of £12.8m. By 2026, we estimate that surplus will increase to £20.4m, increasing thereafter to £37.3m at 2036. The surplus expenditure by the end of the plan period (2036) could support between 2,900-3,700sq m net convenience goods floorspace (depending on format and operator).

**Figure 8.6: Quantitative Need for Convenience Goods Floorspace in Ipswich Borough – Before Commitments**

| Year | Benchmark Turnover (£m) | Ipswich Borough Turnover (£m) | Ipswich Borough Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2017 | 272.9 | 278.2 | 3.3 | 8.6 | 700 | 800 |
| 2021 | 271.0 | 280.5 | 3.4 | 12.8 | 1,000 | 1,300 |
| 2026 | 270.5 | 287.4 | 3.4 | 20.4 | 1,600 | 2,000 |
| 2031 | 271.8 | 296.1 | 3.5 | 27.8 | 2.200 | 2,700 |
| 2036 | 273.2 | 306.8 | 3.7 | 37.3 | 2,900 | 3,700 |

*Source: Tables 5a & 5b of Appendix J*
*Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4a of Experian Retail Planner Briefing Note 14*
*Assumes constant market share of Study Area expenditure claimed by facilities in Ipswich Borough*
*2015 Prices*

8.2.33 We estimate that extant retail planning permissions would, if implemented, provide an estimated 1,464sq m of convenience goods sales floorspace across the Ipswich administrative area. As set out at Figure 8.7, we estimate that these commitments would have a combined turnover of £14.5m if they were operational at base year 2017. Notable convenience goods retail commitments are identified at:

- Rosehill, Felixstowe Road District Centre (planning permissions IP/16/00189/VC & IP/16/00188/VC), which provides a mixed use development comprising an enlarged Aldi and Poundstretcher; and
- Land adjacent to Hertz Scot Group Ltd, Europa Way (planning permission reference 15/00105/FUL), which provides a new Aldi store.

8.2.34 It should be noted that only commitments providing a net sales floorspace of 200 sq m or greater have been included in our assessment; it is considered that proposals of a lesser scale are unlikely to have a tangible effect on shopping patterns.

8.2.35 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 5d of **Appendix J**. The estimated turnover of £14.5m which would be claimed by convenience goods commitments acts to extinguish the expenditure surplus which otherwise exists to support additional convenience goods retail floorspace at 2017. After account is taken of commitments, an expenditure deficit is still apparent at 2021, prior to a residual of £5.9m being identified at 2026, increasing to £13.3m at 2031, and to £22.7m at 2036. The surplus equates to a convenience goods floorspace requirement of between 500 sq m and 600 sq m at 2026 (depending on format and operator), increasing to between 1,000 sq m and 1,300 sq m at 2031, and increasing further to between 1,800 sq m and 2,200 sq m at 2036.

**Figure 8.7: Quantitative Need for Convenience Goods Floorspace in Ipswich Borough – After Commitments**

| Year | Convenience Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus | Commitments | Residual | Min | Max |
| 2017 | 8.6 | 14.5 | -6.7 | - | - |
| 2021 | 12.8 | 14.4 | -2.6 | - | - |
| 2026 | 20.4 | 14.4 | 4.7 | 400 | 500 |
| 2031 | 27.8 | 14.5 | 11.8 | 900 | 1,200 |
| 2036 | 37.3 | 14.6 | 20.9 | 1,600 | 2,100 |

*Source: Table 5c of Appendix J*
*2015 Prices*

Quantitative Capacity - Copdock/Interchange

8.2.36 As noted earlier in the study, Copdock/Interchange, located on the south-western fringe of Ipswich, whilst within neighbouring Babergh District Council, primarily serves residents within Ipswich Borough. Accordingly, in accordance with the sequential approach to site selection any identified capacity at Copdock/Interchange should be directed to town centres first – in this instance Ipswich Town Centre.

8.2.37 Figure 8.8 below therefore considers whether there is any quantitative need for additional convenience good floorspace in Copdock/Interchange that needs to be met within Ipswich Borough rather than Babergh district. There are currently no convenience goods commitments at Copdock/Interchange that need to be taken into account in the following capacity assessment.

**Figure 8.8: Quantitative Need for Convenience Goods Floorspace at Copdock/Interchange**

| Year | Benchmark Turnover (£m) | Copdock/ Interchange Turnover (£m) | Copdock/ Interchange Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2017 | 70.2 | 52.9 | 2.6 | -14.7 | - | - |
| 2021 | 69.7 | 53.3 | 2.7 | -13.8 | - | - |
| 2026 | 69.6 | 54.6 | 2.7 | -12.2 | - | - |
| 2031 | 69.9 | 56.3 | 2.8 | -10.9 | - | - |
| 2036 | 70.3 | 58.3 | 2.9 | -9.1 | - | - |

*Source: Table 6a and 6b of Appendix J. 2015 Prices*

8.2.38 Figure 8.8 shows, as a result of existing convenience goods facilities (Tesco Extra and Aldi) in Copdock/Interchange under-trading, there is no capacity for additional convenience goods floorspace at Copdock/Interchange in the plan period.

8.2.39 As noted in Section 5, the capacity findings of the Babergh & Mid Suffolk District Council Joint Town Centres & Retail Study (2015) for Copdock/Interchange area are constrained because the adopted study area does not include the whole of the Copdock/Interchange catchment area and the study makes broad a broad estimate of the amount of expenditure drawn from the Ipswich urban area. It also doesn't provide separate convenience goods capacity findings for the Copdock/Interchange area and instead provides an overall capacity figure for out-of-centre retail facilities in the Babergh district. Therefore, a comparison between our capacity findings and those set out in the 2015 Joint Town Centres & Retail Study has not been possible.

### Capacity for Future Convenience Goods Floorspace in Suffolk Coastal District

8.2.40 We have also undertaken the exercise set out above for the Suffolk Coastal district administrative area. Once again, in considering the performance of existing retailers, we have made allowance where appropriate for inflow from outside the Study Area. Our detailed assumptions in this regard are set out at Table 4 of **Appendix J**.

8.2.41 Our assessment for Suffolk Coastal district identifies that the expected benchmark turnover of existing convenience goods provision in the administrative area is £263.8m per annum at 2017, which is £28.9m less than the identified survey-derived turnover of £292.7m. This suggests that, taken cumulatively, existing convenience goods provision in the Suffolk Coastal administrative area is 'overtrading' when compared to its expected turnover.

8.2.42 There are again instances where specific facilities trade very strongly or relatively poorly. For example, the Tesco Extra store at Martlesham, which has an estimated convenience goods benchmark turnover of £52.6m, buts turns over an estimated £65.4m is trading particularly well whilst the Co-op store in Felixstowe Town Centre, with an estimated convenience goods benchmark turnover of £12.5m, but turns over an estimated £3.8m, is a lesser performing store.

8.2.43 In order to appraise the need for additional convenience goods retail floorspace, we again consider how the performance of stores will be affected by future growth in expenditure. Figure 8.9 sets out the anticipated increases in expenditure which will be available to the district's convenience goods retail facilities, assuming that current market share is maintained. It is again assumed that the turnover of existing floorspace will improve through improvements in floorspace efficiency as set out in Experian Retail Planner Briefing Note 14.

8.2.44 Figure 8.9 indicates that, after taking into consideration future increase in both population and expenditure, a convenience goods expenditure surplus of £42.4m is identified at 2017. By 2021, after increases in population and expenditure are considered against changes in floorspace productivity, we estimate that there will be an expenditure surplus of £46.7m. By 2026, we estimate that surplus will increase to £54.8m, increasing to £63.1m at 2031, and to £73.5m at 2036. The surplus equates to a current convenience goods floorspace requirement of between 3,300sq m and 4,200sq m (depending on format and operator), increasing to between 3,700sq m and 4,600sq m at 2021, to between 4,300sq m to 5,400sq m by 2026, to between 5,000sq m and 6,200sq m by 2031, and increasing further to between 5,800sq m and 7,200sq m at 2036.

**Figure 8.9: Quantitative Need for Convenience Goods Floorspace in Suffolk Coastal District – Before Commitments**

| Year | Benchmark Turnover (£m) | Suffolk Coastal District Turnover (£m) | Suffolk Coastal District Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2017 | 263.8 | 292.7 | 13.4 | 42.4 | 3,300 | 4,200 |
| 2021 | 262.0 | 295.1 | 13.5 | 46.7 | 3,700 | 4,600 |
| 2026 | 261.4 | 302.4 | 13.9 | 54.8 | 4,300 | 5,400 |
| 2031 | 262.8 | 311.5 | 14.3 | 63.1 | 5,000 | 6,200 |
| 2036 | 264.1 | 322.8 | 14.8 | 73.5 | 5,800 | 7,200 |

*Source: Tables 7a & 7b of Appendix J*
*Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4a of Experian Retail Planner Briefing Note 14*
*Assumes constant market share of Study Area expenditure claimed by facilities in Suffolk Coastal District*
*Notes: Identified capacity is for the district as a whole – in addition to the 6 main towns and Ipswich Eastern Fringe (as set out in Figure 8.10 & 8.11) it also includes smaller settlements/villages.*
*2015 Prices*

8.2.45 When considering the above capacity on an individual town basis, Figure 8.10 below sets out the convenience goods expenditure capacity in Woodbridge, Felixstowe, Saxmundham, Aldeburgh, Framlingham, and Leiston. We have also provided separate capacity and floorspace requirement figures for the Ipswich Eastern Fringe given the extent of convenience goods provision in this area.

**Figure 8.10: Quantitative Need for Convenience Goods Floorspace in Suffolk Coastal District Towns – Before Commitments**

| Year | Benchmark Turnover (£m) | Turnover (£m) | Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| **Woodbridge** | | | | | | |
| 2017 | 8.4 | 11.4 | 0.4 | 3.4 | 300 | 300 |
| 2021 | 8.4 | 11.4 | 0.4 | 3.5 | 300 | 300 |
| 2026 | 8.4 | 11.4 | 0.5 | 3.8 | 300 | 400 |
| 2031 | 8.4 | 11.7 | 0.5 | 4.2 | 300 | 400 |
| 2036 | 8.4 | 12.1 | 0.5 | 4.6 | 400 | 400 |
| **Felixstowe** | | | | | | |
| 2017 | 56.8 | 51.4 | 3.3 | -2.1 | - | - |
| 2021 | 56.4 | 51.8 | 3.3 | -1.3 | - | - |
| 2026 | 56.3 | 53.1 | 3.4 | 0.2 | 0 | 0 |
| 2031 | 56.5 | 54.7 | 3.5 | 1.6 | 100 | 200 |
| 2036 | 56.8 | 56.7 | 3.6 | 3.5 | 300 | 300 |
| **Saxmundham** | | | | | | |
| 2017 | 31.2 | 36.0 | 1.8 | 6.5 | 500 | 600 |
| 2021 | 31.0 | 36.3 | 1.8 | 7.1 | 600 | 700 |
| 2026 | 30.9 | 37.2 | 1.8 | 8.1 | 600 | 800 |
| 2031 | 31.1 | 38.3 | 1.9 | 9.1 | 700 | 900 |
| 2036 | 31.3 | 39.7 | 2.0 | 10.4 | 800 | 1,000 |
| **Aldeburgh** | | | | | | |
| 2017 | 8.9 | 4.7 | 0.2 | -3.9 | - | - |
| 2021 | 8.8 | 4.7 | 0.2 | -3.8 | - | - |
| 2026 | 8.8 | 4.9 | 0.2 | -3.7 | - | - |
| 2031 | 8.8 | 5.0 | 0.3 | -3.6 | - | - |
| 2036 | 8.9 | 5.2 | 0.3 | -3.4 | - | - |
| **Framlingham** | | | | | | |
| 2017 | 7.9 | 11.5 | 0.6 | 4.2 | 300 | 400 |
| 2021 | 7.9 | 11.6 | 0.6 | 4.3 | 300 | 400 |
| 2026 | 7..9 | 11.9 | 0.6 | 4.6 | 400 | 500 |
| 2031 | 7.9 | 12.3 | 0.6 | 5.0 | 400 | 500 |
| 2036 | 8.0 | 12.7 | 0.6 | 5.4 | 400 | 500 |
| **Leiston** | | | | | | |
| 2017 | 9.2 | 8.6 | 0.4 | -0.1 | - | - |
| 2021 | 9.1 | 8.7 | 0.4 | 0.0 | - | - |
| 2026 | 9,1 | 8.9 | 0.4 | 0.2 | 0 | 0 |
| 2031 | 9.2 | 9.2 | 0.5 | 0.5 | 0 | 0 |
| 2036 | 9.2 | 9.5 | 0.5 | 0.8 | 100 | 100 |
| **Ipswich Eastern Fringe** | | | | | | |
| 2017 | 127.4 | 146.3 | 6.7 | 25.5 | 2,000 | 2,500 |
| 2021 | 126.5 | 147.5 | 6.7 | 27.7 | 2,200 | 2,700 |
| 2026 | 126.3 | 151.1 | 6.9 | 31.7 | 2,500 | 3.100 |
| 2031 | 126.9 | 155.7 | 7.1 | 35.9 | 2,800 | 3,500 |
| 2036 | 127.6 | 161.3 | 7.4 | 41.1 | 3,200 | 4,000 |

*Source: Tables 8a, 8b, 9a, 9b, 10a, 10b, 11a, 11b, 12a, 12b, 13a, 13b, 14a & 14b of Appendix J*
*2015 Prices*

8.2.46 We estimate that extant retail planning permissions would, if implemented, provide an estimated 1,943sq m of convenience goods sales floorspace across the District. As set out at Figure 8.11, we estimate that these commitments would have a combined convenience goods turnover of £21.2m if they were operational at base year 2017. Notable convenience goods retail development is proposed in the form of consented development at:

- Land at Hartree Way, Kesgrave (planning permission reference DC/15/1900/FUL), which provides for a small 388sq m gross convenience store;
- M&S Simply Food store, Martlesham Heath Retail Park (now implemented), which provides for a 464sq m net extension to the existing store into the adjoining unit;
- Retail Park Haven Exchange, South Felixstowe (DC/14/2611/FUL), which provides for a new 2,750sq m gross Asda foodstore; and
- Home Bargains, Martlesham (DC/16/3836/VOC), which is intended to provide 400sq m convenience floorspace.

8.2.47 Once more, we have considered only commitments providing a net sales floorspace of 200 sq m as proposals of a lesser scale are unlikely to have a tangible effect on shopping patterns.

8.2.48 Full details of the assumptions made in estimating the turnover of commitments are provided in the notes which accompany Table 7d of **Appendix J**. The estimated turnover of convenience goods turnover which would be claimed by commitments is assessed to be £21.2m. Accordingly, as set out below at Figure 8.9, we identify a convenience goods expenditure surplus of £21.2m at 2017, which is forecast to increase to £25.6m at 2021, increasing to £33.8m by 2026, increasing to £41.9m at 2031, and to £52.3m at 2036.

8.2.49 The surplus equates to a current convenience goods floorspace requirement of between 1,700sq m and 2,100sq m, increasing to between 2,000sq m and 2,500sq m at 2021, to between 2,700sq m to 3,400sq m by 2026, to between 3,300sq m and 4,100sq m by 2031, and increasing further to between 4,100sq m and 5,100sq m at 2036.

**Figure 8.11: Quantitative Need for Convenience Goods Floorspace in Suffolk Coastal District – After Commitments**

| Year | Convenience Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus | Commitments | Residual | Min | Max |
| 2017 | 42.4 | 21.2 | 21.2 | 1,700 | 2,100 |
| 2021 | 46.7 | 21.1 | 25.6 | 2,000 | 2,500 |
| 2026 | 54.8 | 21.0 | 33.8 | 2,700 | 3,400 |
| 2031 | 63.1 | 21.1 | 41.9 | 3,300 | 4,100 |
| 2036 | 73.5 | 21.2 | 52.3 | 4,100 | 5,100 |

*Source: Table 7c of Appendix J*
*Notes: Identified capacity is for the district as a whole – in addition to the 6 main towns and Ipswich Eastern Fringe (as set out in Figure 8.10 & 8.12) it also includes smaller settlements/villages.*
*2015 Prices*

8.2.50 Figure 8.12 below sets out the residual convenience goods expenditure capacity on an individual town basis (including Ipswich Eastern Fringe). We have assumed that all the estimated convenience goods turnover of the commitments will be drawn from the corresponding centre.

8.2.51 The analysis in Figure 8.12 shows:

- Woodbridge – there is a floorspace requirement of circa 400sq m net within the plan period.
- Felixstowe – the Asda store retail commitment at Haven Exchange is expected to absorb any surplus expenditure/floorspace capacity identified for the town in the plan period.
- Saxmundham – there is a floorspace requirement between 600-700sq m net up to 2021, which will increase to between 800sq m and 1,000sq m net by the end of the plan period.
- Aldeburgh – the deficit negates the requirement to provide any new convenience floorspace requirement in the plan period. Accordingly, there is no quantitative need for additional convenience goods floorspace even over the longer term.
- Framlingham – there is a need for convenience goods floorspace between 400-500sq m net in the plan period.
- Leiston – there is minimal convenience goods floorspace requirements in the plan period (100sq m net).
- Ipswich Eastern Fringe – by 2021 there is a floorspace requirement of between 1,300sq m and 1,700sq m net, increasing to between 2,400sq m and 3,000sq m net by 2036.

**Figure 8.12: Quantitative Need for Convenience Goods Floorspace in Suffolk Coastal District Towns – After Commitments**

| Year | Convenience Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus (£m) | Commitments (£m) | Residual (£m) | Min | Max |
| **Woodbridge** | | | | | |
| 2017 | 3.4 | - | 3.4 | 300 | 300 |
| 2021 | 3.5 | - | 3.5 | 300 | 300 |
| 2026 | 3.8 | - | 3.8 | 300 | 400 |
| 2031 | 4.2 | - | 4.2 | 300 | 400 |
| 2036 | 4.6 | - | 4.6 | 400 | 400 |
| **Felixstowe** | | | | | |
| 2017 | -2.1 | 15.4 | -17.5 | - | - |
| 2021 | -1.3 | 15.3 | -16.6 | - | - |
| 2026 | 0.2 | 15.3 | -15.1 | - | - |
| 2031 | 1.6 | 15.4 | -13.7 | - | - |
| 2036 | 3.5 | 15.5 | -12.0 | - | - |
| **Saxmundham** | | | | | |
| 2017 | 6.5 | - | 6.5 | 500 | 600 |
| 2021 | 7.1 | - | 7.1 | 600 | 700 |
| 2026 | 8.1 | - | 8.1 | 600 | 800 |
| 2031 | 9.1 | - | 9.1 | 700 | 900 |
| 2036 | 10.4 | - | 10.4 | 800 | 1,000 |
| **Aldeburgh** | | | | | |
| 2017 | -3.9 | - | -3.9 | - | - |
| 2021 | -3.8 | - | -3.8 | - | - |
| 2026 | -3.7 | - | -3.7 | - | - |
| 2031 | -3.6 | - | -3.6 | - | - |
| 2036 | -3.4 | - | -3.4 | - | - |
| **Framlingham** | | | | | |
| 2017 | 4.2 | - | 4.2 | 300 | 400 |
| 2021 | 4.3 | - | 4.3 | 300 | 400 |
| 2026 | 4.6 | - | 4.6 | 400 | 500 |
| 2031 | 5.0 | - | 5.0 | 400 | 500 |
| 2036 | 5.4 | - | 5.4 | 400 | 500 |
| **Leiston** | | | | | |
| 2017 | -0.1 | - | -0.1 | - | - |
| 2021 | 0.0 | - | 0.0 | 0 | 0 |
| 2026 | 0.2 | - | 0.2 | 0 | 0 |
| 2031 | 0.5 | - | 0.5 | 0 | 0 |
| 2036 | 0.8 | - | 0.8 | 100 | 100 |
| **Ipswich Eastern Fringe** | | | | | |
| 2017 | 25.5 | 10.9 | 14.7 | 1,100 | 1,400 |
| 2021 | 27.7 | 10.8 | 16.7 | 1,300 | 1,700 |
| 2026 | 31.7 | 10.8 | 21.0 | 1,700 | 2,100 |
| 2031 | 35.9 | 10.8 | 25.0 | 2,000 | 2,500 |
| 2036 | 41.1 | 10.9 | 30.3 | 2,400 | 3,000 |

*Source: Tables 8b, 9c, 10b, 11b, 12b, 13b, and 14c of Appendix J*
*2015 Prices*

8.2.52 In considering the capacity figures for Ipswich Eastern Fringe it is important to recognise that in the absence of a main food shopping facility in Woodbridge a large proportion of residents are currently visiting out-of-centre facilities in Ipswich Eastern Fringe. Accordingly, to encourage more sustainable food shopping patterns, and in accordance with the sequential approach to site selection, the Council may want to consider re-distributing a proportion of the floorspace capacity to Woodbridge. The same consideration should also be had to the floorspace capacity identified for Saxmundham where a proportion of residents from both Adleburgh and Leiston are travelling to Saxmundham for their food shopping.

8.2.53 In accordance with the sequential approach to site selection any identified capacity should be directed to centres first – not just Woodbridge Town Centre but also Ipswich Town Centre and centres in the eastern fringe of Ipswich itself.

### Capacity for Future Comparison Goods Floorspace in Ipswich

8.2.54 Turning to comparison goods capacity, it is first important to note that our methodology deviates from that which has been deployed in respect of convenience goods for two principal reasons. Firstly, it can be extremely difficult to attribute an appropriate benchmark turnover to existing comparison goods provision. Secondly, there tends to be greater disparity between the trading performance of apparently similar comparison goods provision depending on its location, the character of the area and the nature of the catchment. As a consequence, we adopt the approach with comparison goods floorspace that it is trading 'at equilibrium' (i.e. our survey derived turnover estimate effectively acts as benchmark) at 2017. This approach is widely adopted in the retail planning industry and is accepted by planning inspectors at local plan examinations.

8.2.55 We assume that there is therefore a nil quantitative need for any additional floorspace across the Ipswich administrative area at 2017. For the purpose of our initial quantitative modelling exercise, it has also been assumed that the future performance of Ipswich's comparison goods facilities will be commensurate with their current market share. Our assessment also takes into consideration the fact that Ipswich Town Centre, its retail parks and standalone large format retail units will attract some limited custom from outside the Study Area. Through consideration of neighbouring retail studies (including Colchester Retail Study (2016), Babergh/Mid Suffolk Retail & Leisure Study(2015), St Edmundsbury and Forest Heath Retail Study (2016), and Tendring Retail Study (2016)) we have assumed that 15% of the overall turnover of comparison goods retailers in the town centre and 5% of the turnover of comparison goods retailers outside the town centre will derive from outside the Study Area. The inflow allowance has the net effect of increasing Ipswich Town Centres identified comparison goods survey derived turnover from £505.6m to £581.5m at 2017.

8.2.56 Facilities in the Ipswich administrative area claim £650.8m of all comparison goods expenditure generated by residents of the Study Area at 2017 which equates to a market share of 45%. Of the £650.8m, £371.6m is derived from residents within the Ipswich ICA (representing an ICA market share of 82%).

8.2.57 As noted in Section 5 (paragraph 5.5.23-24), whilst the surrounding towns of Colchester, Sudbury, Bury St Edmunds and Stowmarket have an influence on comparison goods shopping patterns in the western survey zones (Zones 5, 6 and 7), given their location adjacent to, or within, the study area the level of comparison goods market share captured by them is not surprising or a cause for concern.

8.2.58 We do not consider that the Council needs to plan for additional comparison goods floorspace to capture a higher level of expenditure from these zones. As previously identified, the town centre has seen an increase in its market share of comparison goods expenditure since the 2010 Retail Study (+5% from within the Ipswich ICA) and it vitality and viability has improved. The strengthening of its market share has occurred, not as a result of new comparison goods floorspace development, but primarily as a result of qualitative improvements in the town centre (eg improvements in its retail offer). Planning for additional comparison goods floorspace to capture a higher level of comparison goods expenditure from these zones in line with the previous market share growth rate would result in the need for the Council to plan for a significant level of comparison goods floorspace. Given the lack of available and suitable sites for large scale retail development in the town centre (which is assessed in detail in Section 11) the majority of floorspace capacity will need to be accommodated in out-of-centre sites which could result in a negative impact on the town centre and its comparison goods market share actually decreasing rather than being strengthened.

8.2.59 We consider that the Council should seek to plan for strengthening Ipswich Town Centre's comparison goods market share and capture a higher level of expenditure from the Study Area (Zones 5, 6 and 7 in particular) by way of further qualitative improvements in the town centre including, *inter alia*, improvements to the existing retail stock (to attract a greater number of higher quality retailers); town centre environmental improvements; and implementing a marketing strategy. Our recommendations in respect of the future retail strategy for the Town Centre are discussed further in Section 12 of this study.

8.2.60 Accordingly, our comparison goods floorspace capacity assessment 'rolls forward' Ipswich's current market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Ipswich's retail facilities going forward. By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in the Ipswich administrative area will attract £718.9m of comparison goods expenditure at 2021, increasing to £873.0m at 2026, to £1,048m at 2031, and to £1,273m at 2036.

8.2.61 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2021 there will be an expenditure surplus of £5.3m to support additional comparison goods floorspace within the Ipswich administrative area. As set out in Figure 8.13, this surplus is forecast to increase sharply to £83.6m at 2026, to £177.2m at 2031 and then to £315.1m at 2036. Account has been made for the turnover efficiency of existing comparison goods floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time). The surplus expenditure equates to a comparison goods floorspace requirement of between 900sq m and 1,600sq m (depending on format and operator) by 2021, increasing to between 12,400sq m and 22,700sq m at 2026, to between 23,500sq m to 43,200sq m by 2031, and increasing further to between 37,500sq m and 68,800sq m at 2036.

**Figure 8.13: Quantitative Need for Comparison Goods Floorspace in Ipswich Borough – Before Commitments**

| Year | Benchmark Turnover (£m) | Ipswich Borough Turnover (£m) | Ipswich Borough Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2021 | 803.9 | 718.9 | 90.3 | 5.3 | 900 | 1,600 |
| 2026 | 899.0 | 873.0 | 109.6 | 83.6 | 12,400 | 22,700 |
| 2031 | 1,002 | 1,048 | 131.6 | 177.2 | 23,500 | 43,200 |
| 2036 | 1,118 | 1,273 | 159.8 | 315.1 | 37,500 | 68,800 |

*Source: Tables 16a & 16b of Appendix K*
*Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 14*
*Assumes constant market share of Study Area expenditure claimed by facilities in Ipswich Borough*
*2015 Prices*

8.2.62 Once again, this initial analysis does not take into account existing commitments, which we set out in Table 16d of **Appendix K** and which we estimate would have a combined turnover of £15.3m if it were to be assumed that each was operational at 2017. Notable comparison goods retail development is proposed in the form of consented development at:

- Namco Funscape, Boss Hall Road (out-of-centre) (ref: 15/00313/FUL) – change of use from bowling alley to non-food retail providing 2,000sq m net unrestricted comparison goods floorspace;
- Rosehill development, Felixstowe District Centre (ref: 14/00080/FUL) – providing 890sq m net comparison goods floorspace; and
- Aldi foodstores, Europa Way (ref: 15/00105/FUL) – providing 251sq m net comparison goods floorspaces.

8.2.63 The estimated £15.3m turnover of comparison goods commitments is reasonably substantial and extinguishes much of the need for additional comparison goods floorspace in the Ipswich administrative area in the period to 2026. A positive residual of £64.9m is identified between 2021 to 2026 increasing to £156.3m at 2031, and to £291.8m at 2036. The surplus equates to a comparison goods floorspace requirement of between 9,600sq m and 17,600sq m at 2026, increasing to between 20,800sq m and 38,100sq m at 2031, and increasing further to between 34,800sq m and 63,700sq m by 2036. The minimum figure is based on the identified need being met through the delivery of high street floorspace in Ipswich Town Centre (which we estimate could achieve a sales density in the order of £5,500 per sq

m) and the maximum figure relates to need being met by bulky goods retailers, which generally accommodate operators which achieve lesser sales densities (which we estimate could achieve a sales density in the order of £3,000 per sq m). The requirement in respect of additional comparison goods floorspace is set out below at Figure 8.14.

**Figure 8.14: Quantitative Need for Comparison Goods Floorspace in Ipswich Borough – After Commitments**

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus | Commitments | Residual | Min | Max |
| 2021 | 5.3 | 16.8 | -11.5 | - | - |
| 2026 | 83.6 | 18.8 | 64.9 | 9,600 | 17,600 |
| 2031 | 177.2 | 20.9 | 156.3 | 20,800 | 38,100 |
| 2036 | 315.1 | 23.3 | 291.8 | 34,800 | 63,700 |

*Source: Table 16c of Appendix K*
*2015 Prices*

Quantitative Capacity - Copdock/Interchange

8.2.64 As noted previously at paragraph 8.2.36, whilst Copdock/Interchange is located within Babergh District Council's administrative area, due to its location on the south western fringe of Ipswich and the fact it primarily serves Ipswich Borough residents, in accordance with the sequential approach to site selection any identified comparison goods capacity at Copdock/Interchange should be directed to town centres first – in this instance Ipswich Town Centre.

8.2.65 Figure 8.15 below therefore considers whether there is any quantitative need for additional comparison goods floorspace in Copdock/Interchange that needs to be met within Ipswich Borough rather than Babergh district. There are currently no comparison goods commitments at Copdock/Interchange that need to be taken into account in the following capacity assessment.

**Figure 8.15: Quantitative Need for Comparison Goods Floorspace - Copdock/Interchange**

| Year | Benchmark Turnover (£m) | Copdock/ Interchange Turnover (£m) | Copdock/ Interchange Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2021 | 40.3 | 38.7 | 1.9 | 0.3 | 0 | 100 |
| 2026 | 45.1 | 47.0 | 2.3 | 4.2 | 600 | 1,100 |
| 2031 | 50.3 | 56.4 | 2.8 | 8.9 | 1,200 | 2,200 |
| 2036 | 56.1 | 68.5 | 3.4 | 15.8 | 1,900 | 3,500 |

*Source: Tables 17a & 17b of Appendix K*
*2015 Prices*

8.2.66 Figure 8.15 shows that existing out-of-centre retail facilities at Copdock/Interchange are generating comparison goods floorspace capacity for new floorspace over the plan period. It identifies that there is a comparison goods floorspace requirement of between 600sq m and 1,100sq m net by 2026 increasing to between 1,900sq m and 3,500sq m net by the end of the plan period.

8.2.67 In order to avoid a situation where both Babergh District Council and Ipswich Borough Council plan for this comparison goods floorspace need in their administrative areas we would advise that both Council's engage with each other to make sure the policy approach for retail capacity at Copdock/Interchange is embedded in policy for both authority areas. As we have already advised at paragraph 8.2.61 in accordance with the sequential approach to site selection the floorspace capacity it is our view that this should be directed to Ipswich Town Centre in the first instance.

8.2.68 As noted in Section 5, the Babergh & Mid Suffolk District Council's Joint Town Centres & Retail Study (2015) identifies comparison goods growth of 2,432sq m net floorspace for the Copdock/Interchange area by 2031. However, because the study area did not include the Ipswich urban area (and therefore a significant part of Copdock/Interchange's catchment area) the study made a broad estimate on the level of trade drawn from this area. Because of the broad estimate the study overestimates the level of comparison goods capacity at Copdock/Interchange.

### Capacity for Future Comparison Goods Floorspace in Suffolk Coastal District

8.2.69 In assessing the quantitative need for additional comparison goods floorspace in the Suffolk Coastal district, we once again adopt the position that existing facilities are trading 'in equilibrium' and that there is therefore a nil quantitative need for any additional floorspace across the Suffolk Coastal district administrative area at 2017. It has also again been assumed for this assessment that the future performance of Suffolk Coastal district's comparison goods facilities will be commensurate with their current market share.

8.2.70 Through consideration of the comparison goods facilities in, and attractiveness of, each town centre to visitors/tourists, we have made an estimate of the proportion of centre/facility turnover derived from outside the Study Area. Our inflow estimates are set out in Table 15 of **Appendix K**.

8.2.71 The inflow allowance has the net effect of increasing Suffolk Coastal district's identified comparison goods survey derived turnover from £224.8m to £241.8m at 2017.

8.2.72 The £224.8m of comparison goods expenditure claimed from inside the Study Area at 2017 equates to a market share of 15.5% of all comparison goods expenditure generated by residents of the Study Area. Our assessment 'rolls forward' this market share to examine the likely level of comparison goods floorspace required to maintain the role and function of Suffolk Coastal districts retail facilities going forward.

8.2.73 By 'rolling forward' this market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in the Suffolk Coastal administrative area will attract £267.1m of comparison goods expenditure at 2021, increasing to £324.3m at 2026, to £389.3m at 2031, and to £472.8m at 2036.

8.2.74 Given the forecast increases in comparison goods expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2021 there will be an expenditure surplus of just £1.7m to support additional comparison goods floorspace within the Suffolk Coastal district administrative area. As set out in Figure 8.16, this surplus is forecast to increase to £27.6m at 2026, to £58.5m at 2031 and then to £104.0m at 2036. Account has again been made for the turnover efficiency of existing comparison goods floorspace to increase. The surplus expenditure equates to a comparison goods floorspace requirement of between 300sq m and 500sq m (depending on format and operator) by 2021, increasing to between 4,500sq m and 7,500sq m at 2026, to between 8,500sq m to 14,200sq m by 2031, and increasing further to between 13,600sq m and 22,700sq m at 2036.

**Figure 8.16: Quantitative Need for Comparison Goods Floorspace in Suffolk Coastal District – Before Commitments**

| Year | Benchmark Turnover (£m) | Suffolk Coastal District Turnover (£m) | Suffolk Coastal District Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| 2021 | 265.2 | 248.4 | 18.7 | 1.7 | 300 | 500 |
| 2026 | 296.7 | 301.6 | 22.7 | 27.6 | 4,500 | 7,500 |
| 2031 | 330.8 | 362.0 | 27.3 | 58.5 | 8,500 | 14,200 |
| 2036 | 368.8 | 438.9 | 33.1 | 104.0 | 13,600 | 22,700 |

*Source: Table 18c of Appendix K*
*Benchmark turnover to increase in line with improvements in turnover efficiency as set out in Figure 4b of Experian Retail Planner Briefing Note 14*
*Assumes constant market share of Study Area expenditure claimed by facilities in Suffolk Coastal District*
*2015 Prices*

8.2.75 When considering the above capacity on an individual town basis, Figure 8.17 below sets out the comparison goods expenditure capacity in Woodbridge, Felixstowe, Saxmundham, Aldeburgh, Framlingham, and Leiston. As with the convenience goods capacity assessment we have also provided separate capacity and floorspace requirement figures for the Ipswich Eastern Fringe given the extent of comparison goods provision in this area.

**Figure 8.17: Quantitative Need for Comparison Goods Floorspace in Suffolk Coastal District Towns – Before Commitments**

| Year | Benchmark Turnover (£m) | Turnover (£m) | Inflow (£m) | Surplus Expenditure (£m) | Floorspace Requirement (sq m net) | |
|---|---|---|---|---|---|---|
| | | | | | Min | Max |
| **Woodbridge** | | | | | | |
| 2021 | 67.5 | 61.8 | 6.2 | 0.4 | 100 | 100 |
| 2026 | 75.5 | 75.0 | 7.5 | 7.0 | 1,11 | 1,900 |
| 2031 | 84.2 | 90.0 | 9.0 | 14.9 | 2,200 | 3,600 |
| 2036 | 93.8 | 109.4 | 10.9 | 26.5 | 3,500 | 5,800 |
| **Felixstowe** | | | | | | |
| 2021 | 61.4 | 56.1 | 5.6 | 0.4 | 100 | 100 |
| 2026 | 68.6 | 68.2 | 6.8 | 6.4 | 1,000 | 1,700 |
| 2031 | 76.5 | 81.8 | 8.2 | 13.5 | 2,000 | 3,300 |
| 2036 | 85.3 | 99.4 | 9.9 | 24.0 | 3,200 | 5,300 |
| **Saxmundham** | | | | | | |
| 2021 | 14.0 | 12.8 | 1.3 | 0.1 | 0 | 0 |
| 2026 | 15.7 | 15.6 | 1.6 | 1.5 | 200 | 400 |
| 2031 | 17.5 | 18.7 | 1.9 | 3.1 | 500 | 800 |
| 2036 | 19.5 | 22.7 | 2.3 | 5.5 | 700 | 1,200 |
| **Aldeburgh** | | | | | | |
| 2021 | 6.2 | 5.4 | 0.8 | 0.0 | 0 | 0 |
| 2026 | 6.9 | 6.6 | 1.0 | 0.6 | 100 | 200 |
| 2031 | 7.7 | 7.9 | 1.2 | 1.4 | 200 | 300 |
| 2036 | 8.6 | 9.6 | 1.4 | 2.4 | 300 | 500 |
| **Framlingham** | | | | | | |
| 2021 | 10.6 | 10.2 | 0.5 | 0.1 | 0 | 0 |
| 2026 | 11.9 | 12.3 | 0.6 | 1.1 | 200 | 300 |
| 2031 | 13.2 | 14.8 | 0.7 | 2.3 | 300 | 600 |
| 2036 | 14.7 | 18.0 | 0.9 | 4.2 | 500 | 900 |
| **Leiston** | | | | | | |
| 2021 | 10.6 | 10.1 | 0.5 | 0.1 | 0 | 0 |
| 2026 | 11.8 | 12.3 | 0.6 | 1.1 | 200 | 300 |
| 2031 | 13.2 | 14.8 | 0.7 | 2.3 | 300 | 600 |
| 2036 | 14.7 | 18.0 | 0.9 | 4.1 | 500 | 900 |
| **Ipswich Eastern Fringe** | | | | | | |
| 2021 | 79.4 | 76.1 | 3.8 | 0.5 | 100 | 200 |
| 2026 | 88.8 | 92.5 | 4.6 | 8.3 | 1,200 | 2,200 |
| 2031 | 99.0 | 111.0 | 5.5 | 17.5 | 2,300 | 4,300 |
| 2036 | 110.4 | 134.8 | 6.7 | 31.1 | 3,700 | 6,800 |

*Source: Tables 19a, 19b, 20a, 20b, 21a, 21b, 22a, 22b, 23a, 23b, 24a, 24b, 25a and 25b of Appendix K*
*2015 Prices*

8.2.76 We set out the revised position once extant commitments are taken into consideration below at Figure 8.18. Notable comparison goods retail development is proposed in the form of consented development at:

- 2 non-food bulky comparison goods units on land off Anson Road, Martlesham (DC/16/2828/FUL) which provides for 2,974sq m net comparison goods floorspace (currently being implemented). Unit 2 is due to be occupied by DIY retailer, Wickes;
- 2 non-food bulky comparison goods units at Martinsyde, Beadmore Park, Martlesham (DC/16/3836/VOC) which is intended to provide 1,830sq m net comparison goods floorspace (currently being impleneted). Unit 1 is due to be occupied by Home Bargains, Unit 2 by Hughes Electrical; and
- a new Asda store, Haven Exchange Retail Park (DC/14/2611/FUL) which provides for 652sq m net comparison goods floorspace.

8.2.77 After taking into account commitments positive residual does not arise until 2031 where a residual of £21.7m is identified. This is anticipated to increase to £63.0m by 2036. The surplus is set out below at Figure 8.19 and equates to a comparison goods floorspace requirement of between 3,200sq m and 5,300sq m at 2031, increasing to between 8,300sq m and 13,800sq m at 2036.

**Figure 8.19: Quantitative Need for Comparison Goods Floorspace in Suffolk Coastal District – After Commitments**

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus | Commitments | Residual | Min | Max |
| 2021 | 1.7 | 29.5 | -27.7 | - | - |
| 2026 | 27.6 | 32.9 | -5.4 | - | - |
| 2031 | 58.5 | 36.7 | 21.7 | 3,200 | 5,300 |
| 2036 | 104.0 | 41.0 | 63.0 | 8,300 | 13,800 |

*Source: Table 18c of Appendix K*
*Min Floorspace Capacity - Average sales density assumed to be £5,000sq m at 2017 which WYG consider to be towards the higher end of what could be achieved in Suffolk Coastal District*
*Max Floorspace Capacity - Average sales density assumed to be £3,000/sq m at 2017 which WYG consider to be towards the higher end of what could be achieved in Suffolk Coastal District*
*2015 Prices*

8.2.78 Building on the above position, Figure 8.20 considers the comparison goods capacity in each of the identified town centres in the district (and the Ipswich Fringe area).

**Figure 8.20: Quantitative Need for Comparison Goods Floorspace in Suffolk Coastal District Towns – After Commitments**

| Year | Comparison Goods | | | | |
|---|---|---|---|---|---|
| | £m | | | Floorspace Requirement (sq m net) | |
| | Surplus (£m) | Commitments (£m) | Residual (£m) | Min | Max |
| **Woodbridge** | | | | | |
| 2021 | 0.4 | - | 0.4 | 100 | 100 |
| 2026 | 7.0 | - | 7.0 | 1,100 | 1,900 |
| 2031 | 14.9 | - | 14.9 | 2,200 | 3,600 |
| 2036 | 26.5 | - | 26.5 | 3,500 | 5,800 |
| **Felixstowe** | | | | | |
| 2021 | 0.4 | 6.1 | -5.7 | - | - |
| 2026 | 6.4 | 6.8 | -0.4 | - | - |
| 2031 | 13.5 | 7.6 | 5.9 | 900 | 1,400 |
| 2036 | 24.0 | 8.5 | 15.6 | 2,000 | 3,400 |
| **Saxmundham** | | | | | |
| 2021 | 0.1 | - | 0.1 | - | - |
| 2026 | 1.5 | - | 1.5 | 200 | 400 |
| 2031 | 3.1 | - | 3.1 | 500 | 800 |
| 2036 | 5.5 | - | 5.5 | 700 | 1,200 |
| **Aldeburgh** | | | | | |
| 2021 | 0.0 | - | 0.0 | - | - |
| 2026 | 0.6 | - | 0.6 | 100 | 200 |
| 2031 | 1.4 | - | 1.4 | 200 | 300 |
| 2036 | 2.4 | - | 2.4 | 300 | 500 |
| **Framlingham** | | | | | |
| 2021 | 0.1 | - | 0.1 | - | - |
| 2026 | 1.1 | - | 1.1 | 200 | 300 |
| 2031 | 2.3 | - | 2.3 | 300 | 600 |
| 2036 | 4.2 | - | 4.2 | 500 | 900 |
| **Leiston** | | | | | |
| 2021 | 0.1 | - | 0.1 | - | - |
| 2026 | 1.1 | - | 1.1 | 200 | 300 |
| 2031 | 2.3 | - | 2.3 | 300 | 600 |
| 2036 | 4.1 | - | 4.1 | 500 | 900 |
| **Ipswich Eastern Fringe** | | | | | |
| 2021 | 0.5 | 21.3 | -20.8 | - | - |
| 2026 | 8.3 | 23.4 | -15.1 | - | - |
| 2031 | 17.5 | 26.1 | -8.6 | - | - |
| 2036 | 31.1 | 29.1 | 2.0 | 200 | 400 |

*Source: Tables 19b, 20c, 21b, 22b, 23b, 24b and 25b of Appendix K*
*2015 Prices*

8.2.79 Figure 8.20 show that:

- <u>Woodbridge</u> – there is a floorspace requirement of between 1,100sq m and 1,900sq m net by 2026 increasing to between 3,500sq m and 5,800sq m net by the end of the plan period.

- Felixstowe – the existing retail commitment in the town would create an expenditure deficit in the short and medium term however there is a floorspace requirement of between 2,000-3,400sq m net by the end of the plan period.
- Saxmundham – there is a floorspace capacity requirement of between 700sq m to 1,200sq m net within the plan period.
- Aldeburgh – floorspace capacity is limited to between 300-500sq m net by 2036.
- Framlingham & Leiston – there is a floorspace requirement of between 500sq m and 900sq m net within each town in the plan period.
- Ipswich Eastern Fringe –the retail commitments at Martlesham are expected to absorb any surplus expenditure/floorspace capacity until 2036 where there is a small floorspace capacity requirement of between 200-400sq m net.

8.2.80 The capacity assessment identifies that Woodbridge and Felixstowe have the most identified capacity over the plan period and should be the main focus for future comparison goods shopping, subject to suitable and available sites being found.

8.2.81 Again, as we have noted for convenience goods capacity, in accordance with the sequential approach to site selection the identified comparison goods capacity for the Ipswich Eastern Fringe area, albeit very small, should be directed to town centres first. In this instance, due to location of retail facilities in the Ipswich Eastern Fringe area this should be directed to centres that fall within its catchment. The centres not only include Woodbridge and Felixstowe but also, as the major regional centre, Ipswich Town Centre.

8.2.82 In order to avoid a situation where both Suffolk Coastal District Council and Ipswich Borough Council plan for convenience and comparison goods retail floorspace need in their administrative areas we would advise that both Council's engage with each other to make sure the policy approach for retail capacity for the Ipswich Eastern Fringe is embedded in policy for both authority areas.

## 8.3 Qualitative Need

### Ipswich Town Centre

8.3.1 Our qualitative assessment of Ipswich Town Centre in Section 6, informed by feedback from key stakeholders, our own analysis and the household telephone survey, has highlighted a number of qualitative deficiencies with the town centres retail provision. These are summarised and discussed further below.

8.3.2 There is no large format convenience superstore within the town centre, with the convenience offer provided across a number of smaller scale foodstores, as well as by Ipswich Market. Accordingly, and as evident from the household survey results, the existing convenience facilities in the town centre primarily meet the day-to-day shopping top-up needs of residents/visitors.

8.3.3 A good level of independent convenience stores remain in the town, in the most part dispersed across the more secondary shopping frontage. Since the 2010 Retail & Leisure Study, the overall number of convenience goods outlets in the centre has increased by 7. Of particular note Iceland has relocated from St Matthew's Street into the Sailmakers Shopping Centre and Waitrose has opened a 'Little Waitrose' format store on Princes Street.

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

8.3.5 Turning to comparison goods provision, our qualitative assessment has found that the overall provision of comparison goods units in Ipswich Town Centre is identical to the national average with the current proportion of floorspace in comparison goods use significantly higher than the national average.

8.3.6 As identified in Section 5 of this study, Ipswich Town Centre is assessed to be achieving a comparison goods market share of 62% from within the Ipswich ICA. The town centre has strengthened its market share of comparison goods expenditure since 2010 (+5% (from 57%)) and 2005 (+13% (from 49%)) and is competing well against surrounding centres and out-of-centre retail facilities.

8.3.7 With particular regard to the main out-of-centre retail facilities in Ipswich (but outside Ipswich Borough), it is noted that Copdock/Interchange has seen a decrease in its comparison goods market share since 2010 (from 6.1% to 4%). Retail parks in Martlesham (Ipswich South Eastern Fringe) have however seen an increase in their comparison goods market share (from 1.4% to 6%). Accordingly, as noted in Section 3, to minimise further competition and protect the vitality and viability of Ipswich Town Centre (and other defined centres) it is important that both Councils control the continued growth of new out-of-centre/retail park formats in these locations (and others).

8.3.8 We consider that the Council should, in addition to identifying sites/units for potential new comparison goods floorspace requirements under a constant market share capacity approach, seek to improve Ipswich Town Centre's comparison goods market share by way of: qualitative improvements including, *inter alia*, improvements to the existing retail stock (to attract a greater number of higher quality retailers); town centre environmental improvements; and implementing a marketing strategy. Our recommendations in respect of the future Retail Strategy for the Town Centre are discussed further in Section 12 of this study.

8.3.9 The town centre contains 26 of the 29 'major retailers' defined by Experian Goad. The 3 'major retailers' that are not present are John Lewis, Next and House of Fraser. It is noted that Colchester contains 24, Bury St Edmunds, 23, and Norwich all of the major retailers defined by Experian. Overall, both Colchester and Bury St Edmunds contain a comparable number of comparison goods national multiple retailers to Ipswich. Whilst, as a larger centre, Norwich contains a greater number of comparison goods national multiple retailers than Ipswich (including House of Fraser, John Lewis, Apple, Zara, Oasis, French Connection, Hollister, Levi's, Boux Avenue, and Superdry) the survey results highlight that Norwich does not draw comparison goods expenditure from the Ipswich ICA and surrounding zones.

8.3.10 Whilst the town centre is considered to provide a good variety of national multiple and independent retailers, and there is evidence of retailer/investor confidence and retailer demand in the town centre, the centre lacks a high quality department store and its offer of higher brand national multiple comparison retailer is limited.

8.3.11 In terms of attracting a high quality department store, following the opening of their Home store at Futura Park, John Lewis no longer has a requirement for a store in Ipswich and House of Fraser do not currently have a requirement for a new store in Ipswich. At the current time it is therefore difficult to see a high quality department store being attracted in the town centre in the short to medium term.

8.3.12 We have identified that the proportion of clothing and footwear units and floorspace in the town centre are above the UK averages which suggests the town centre generally provides a good clothing and footwear offer. The household survey also identifies that Ipswich Town Centre captures a relatively strong market share from the Ipswich ICA (78%). However, the current market is lower than the retention level achieved at 2010 (88%) which suggests a weakening in the town centre's clothing and footwear offer. The reduction is primarily due to new provision in out-of-centre retail parks and possibly due to the town centre's clothing and footwear offer primarily consisting of a mid-range/value offer.

8.3.13 Our qualitative assessment has found that a significant number of higher brand retailers are absent from the town centre. The recent opening of high end retailers Jack Wills and Pandora provides evidence that there is potential to be able to attract higher brand retailers to the town centre. However, the lack of available large units/sites in the prime shopping area capable of meeting national multiple occupier's requirements may prove to be an obstacle to providing suitable accommodation

8.3.14 From our discussions with a number of retailers/stakeholder there appears to be a general perception that Ipswich Town Centre lacks behind other surrounding large centres in terms of general retail offer and, with the exception of Cornhill, the town centre 'prime pitch area' is not particularly clear with retail facilities spread across a large area. Of particular note, Next have confirmed to us that the main reason why they relocated from the town centre in 2015 was due to their old store on Westgate Street being *"too off pitch"* and *"too small to accommodate women's and children's departments on the ground floor"*. Next have identified to us that they would like to re-open a store in the town centre and have a requirement to open a new 1,672-1,858 (18,000-20,000sq ft) two storey store in a prime pitch location.

8.3.15 It is therefore considered important that the Council work with its partners and relevant landowners:

(1) to review, identify and deliver development/unit opportunities in the town centre prime shopping area. We would advise that the review should include whether it would be possible to amalgamate existing units/accommodation; and

(2) develop a marketing strategy to seek to turnaround some of the negative perception of the town centre.

8.3.16 A number of potential site/unit opportunities are assessed in Section 11 of this study and our recommendations on the town centre strategy is set out in Section 12.

### Suffolk Coastal District

8.3.17 Our qualitative assessments of town centres in the Suffolk Coastal district is set out in Section 7. The qualitative retail related deficiencies, informed by feedback from key stakeholders, the household survey, and our own observations, are summarised and discussed further below.

Woodbridge Town Centre

8.3.18 The Co-op foodstore (980sq m gross) in the Turban Centre provides the main food retail offer in the town centre. Including the Co-op store, the town centre provides a total of 14 convenience goods units. The current proportion of convenience units is slightly below the UK average, however, in floorspace terms, is significantly below the UK average. Notwithstanding this, the town centre is well represented in terms of its independent/specialist convenience goods offering.

8.3.19 The household survey identifies that the Co-op foodstore is not currently meeting the shopping needs of Woodbridge residents with the majority visiting the larger foodstores in the Ipswich Eastern Fringe. The limited existing foodstore provision in the town and the shopping patterns indicate that there is a currently a foodstore qualitative deficiency in the town.

8.3.20 Aldi has identified a requirement to open a new store in the town. A new Aldi store would help address the identified qualitative deficiency. We would therefore advise that a suitable site is investigated. Due to heritage and physical constraints it appears unlikely that the town centre itself will be able to accommodate a foodstore facility capable of accommodating a full main food shop. Accordingly, potential sites will need to be investigated in accordance with the sequential approach to site selection. We note that Aldi have requirements for a new store in both Woodbridge and Ipswich Eastern Fringe. Aldi's current planning application for a new store in Ipswich Eastern Fringe (Martlesham) would not fulfil their potential requirement for a separate store in Woodbridge.

8.3.21 In terms of comparison goods retailing, the town centre has a good and mixed offer including some premium brand retailers. It also provides a good mix of both national and independent occupiers. Our qualitative analysis in Section 7 identifies that the current proportion of comparison goods units in the town centre (both in unit and floorspace terms) is significantly above the UK average. In terms of shopping patterns, whilst Ipswich, as the sub-regional centre, does have an influence on comparison goods shopping patterns in Woodbridge, the current comparison goods retention levels for the town are considered to be reasonable. The fact that vacancy levels in Woodbridge Town Centre are very low and that there are a number of retailers/services, including Fat Face, Peacocks, Boots, WHSmith, Card Factory and Prezzo, that are present in both Woodbridge and Ipswich Town Centre, provides evidence the centres are not in competition with each other.

8.3.22 Having regard to the existing comparison goods provision in the town centre and the towns comparison goods retention levels we do not consider that there are currently any comparison goods qualitative deficiencies in the town centre.

Felixstowe Town Centre

8.3.23 Felixstowe Town Centre provides a reasonably good convenience goods offer. The current proportion of units in convenience goods use is in line with the UK average with the level of convenience floorspace slightly above the UK average. Whilst Felixstowe Town Centre lacks a medium/large foodstore capable of meeting a full main food shop the household survey results demonstrates that the town as a whole generally meets with both main and top-up food shopping requirements. Convenience goods foodstore provision will be further enhanced should Asda implement the extant planning permission for their 2,750sq m gross foodstore at Haven Exchange Retail Park and we note that Farmfoods have a requirement, which the extant Asda planning permission would not be able to meet, to open a store in the town. Accordingly, there is not considered to be a qualitative need for additional convenience goods foodstore provision in Felixstowe in the near future.

8.3.24 Turning to comparison goods provision, for the size of the town and its catchment the town centre provides a reasonably good comparison goods offer including national multiple retailers such as Clarks, Shoe Zone, Burton, New Look, Dorothy Perkins, Peacocks, Edinburgh Woollen Mill, and Bon Marche. The town centre also provides a good number of independent retailers with the current proportion of units representing 56% of the total comparison goods units.

8.3.25 Given the size and catchment of Felixstowe Town Centre, the current comparison goods provision in the town centre and its retention levels are considered to be reasonable. Like Woodbridge Town Centre, given the role, comparison goods provision, and larger catchment of the sub-regional centre of Ipswich there will always be a proportion of Felixstowe residents that travel to Ipswich for comparison goods shopping. The fact that a number of national multiple retailers operate from both Felixstowe and Ipswich Town Centre provides evidence that Felixstowe Town Centre provides a complementary rather than competing role with Ipswich Town Centre.

8.3.26 Whilst our qualitative assessment in Section 6 identifies that the town centre lacks a department store, given its reasonably constrained catchment, the location of Ipswich Town Centre, the lack of potential opportunity site in the prime retail area, and the current limited requirements from department store operators to open new stores, it is unlikely that the town centre will be attractive to a department store operator for the foreseeable future.

Saxmundham Town Centre

8.3.27 Saxmundham Town Centre provides a strong convenience goods offer including large Tesco and Waitrose foodstores. Primarily as a result of the two large foodstores, the town centre retains a high proportion of convenience goods expenditure. Accordingly, although we note that Aldi have a requirement to open a foodstore in the town, we do not consider that there is a qualitative need for any further convenience goods foodstore provision in the town.

8.3.28 Turning to comparison goods, for its size and role, it is considered Saxmundham Town Centre provides a reasonable comparison goods offer. The current proportion of comparison goods units is broadly comparable to the UK average with retailers predominantly being independents (86%). Whilst we note that at the stakeholder workshop it was suggested that the town centre did not provide a particularly strong comparison good offer, given its size and role, we do not consider that there is currently a qualitative need for a material increase in comparison goods retail provision in the town centre.

Aldeburgh Town Centre

8.3.29 Reflecting the lack of medium/large main foodstore facility Aldeburgh captures only 9% of main food shopping from its zone (Zone 15 (shared with Leiston)). The out-of-centre Tesco Express on Saxmundham Road captures 7% of the 9% main food shopping share. There is no medium/large foodstore within the town centre (foodstore provision being located at Saxmundham Road (Co-op (445sq m net), Tesco Express (254 sq m net)). The town centre convenience goods provision serves a top-up shopping role.

8.3.30 Whilst it is clear that there is a qualitative deficiency in main-food provision in the town, given the size and population of Aldeburgh and its catchment area, it is very unlikely that the town could support a further main foodstore facility. Particularly a foodstore of a size which would be capable of competing with the large Tesco and Waitrose foodstores in Saxmundham and claw back expenditure.

8.3.31 In terms of comparison goods retailing, our survey of the town centre has found that the current proportion of comparison goods units is significantly higher than the national average, albeit in floorspace terms, owing to the size of units in the town centre, is identical to the UK average.

8.3.32 The comparison goods offer is, in part, skewed towards the tourist/visitor market and includes a number of national multiple retail stores offering clothing, footwear and accessories for men, women and children. Independent retailers however make up the majority (69%) of the comparison goods units.

8.3.33 Having regard to existing comparison goods provision in the town centre and its role/size we do not consider that there is any qualitative deficiencies in comparison goods retailing. Indeed, we note that qualitative deficiencies in the comparison goods provision in the centre were not raised by stakeholders as an particular issue and the most popular response from household survey respondents when asked what they most liked about the town centre was the choice/range of shops.

8.3.34 Aldeburgh clearly forms a dual function as a local and visitor town centre. Whilst there is currently a good balance of 'local' and 'visitor' comparison goods retailers it will be important to monitor the balance going forward.

Framlingham Town Centre

8.3.35 The household survey has identified that Framlingham Town Centre retains 31% of main-food and 79% of top-up food market share from its Zone (Zone 13). The main convenience offer is provided by a medium sized Co-op foodstore (1,034sq m net). Primarily as a result of the size of the Co-op foodstore the proportion of convenience goods floorspace in the centre is considerably higher than the UK average. The centre also benefits from a market held twice a week which includes a variety of convenience goods stalls. Having regard to the size of Framlingham, its catchment population and existing convenience goods provision in the town centre we do not consider that there is currently a qualitative need for an additional foodstore in the town centre.

8.3.36 Turning to comparison goods, we have identified that the town centre provides 28 comparison goods units occupying around 2,600sq m. All of the comparison goods units are occupied by independent retailers with the exception of the 3 charity shops. When comparing the number of comparison units to the national average the town centre has a higher proportion of units (45% compared to 32%). Given the role and scale of the town centre in the retail hierarchy and existing comparison goods floorspace we also do not consider that there is a qualitative deficiency in comparison goods provision in the town centre.

Leiston Town Centre

8.3.37 Leiston Town Centre provides a reasonable convenience goods offer. However, whilst the Co-op store does meet some resident's main food requirements a high proportion are travelling to the large Tesco and Waitrose foodstores in Saxmundham for their main food shop. As with Aldeburgh, whilst this suggests that there is a qualitative deficiency in main-food provision in the town, given the size and population of Leiston and its limited catchment area, it is very unlikely that the town could support a further main foodstore facility which would be capable of clawing back expenditure spent at the large Tesco and Waitrose foodstores in Saxmundham.

8.3.38 The town centre comparison goods offer is provided in 26 units totalling 3,610sq m of floorspace. The current proportion of units and floorspace in comparison goods use is higher than the national averages. The majority (81%) of comparison goods retailers in the town centre are independent retailers. Both stakeholders and respondents did not raise any particular concerns with the town centres comparison goods offer. Accordingly, given its role and catchment, we do not consider that there is qualitative deficiency in comparison goods provision in the town centre. We consider that the 'Land at High Street' redevelopment site (identified in the Leiston Neighbourhood Development Plan) will provide sufficient opportunity to improve the range of comparison goods retail facilities in the town centre in the plan period.

# 9.0 Commercial Leisure Needs Assessment

## 9.1 Introduction

9.1.1 Our approach to the assessment of quantitative need in the leisure market necessarily departs from our retail methodology for a number of reasons, including the fragmentation of the market and the limited availability of accurate data. However, the household survey undertaken to inform the Study asked respondents questions about their use of commercial leisure facilities and, through reference to market share, we are therefore able to form a view as how Ipswich Borough and the Suffolk Coastal District currently meet the needs of their population in relation to the bingo, cinema, ten-pin bowling, restaurant and café/coffee shop, and health and fitness gym sectors.

9.1.2 As we noted in Section 4 of the study, WYG acknowledges that there can be limitations to survey research, particularly with regard to the sample size which can be achieved and the use of contact by home telephone only. The results should therefore be taken to be a broad indication of consumer preferences.

9.1.3 We also use national statistics in respect of the typical level of provision of specific types of facilities to assist our judgement in respect of the likely future need for additional facilities in the two administrative areas. By reference to estimated increases in the Study Area population, this 'benchmarking' exercise informs our judgement in respect of the likely future needs.

9.1.4 In considering future commercial leisure provision, it should be noted that certain types of facility are often provided in locations proximate to large centres. Accordingly, we anticipate that some of Suffolk Coastal districts commercial leisure needs could possibly be met within or in the vicinity of Ipswich Town Centre. The analysis that follows seeks to apportion future growth in commercial leisure provision on the basis of Ipswich and Suffolk Coastal's current market share, but this should be viewed with some flexibility in respect of how opportunities that come forward 'on the ground' can appropriately contribute to meeting identified needs.

9.1.5 For each leisure sector, we consider the current broad patterns of existing use, before then assessing the need for additional facilities.

## 9.2 Participation Leisure Activities

9.2.1 Figure 9.1 examines participation rates for a range of leisure activities (including non-commercial leisure activities) across the 16 zones of the Study Area. The most popular single activity is to visit restaurants, which 60% of Study Area respondents participate in, followed then by visiting café/coffee shops (40% of respondents), pubs and bars (38% of respondents), and then Cinema (35% of respondents) and theatres and concert halls (35% of respondents). Less popular activities include visiting nightclubs, bingo halls and social clubs.

**Figure 9.1: Participation in Leisure Activities by Zone (%)**

| Activity | 1 | 2 | 3 | 4 | Ipswich ICA Av. | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Study Area Av. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Outdoor Health and Fitness | 7 | 18 | 24 | 14 | **16** | 36 | 19 | 32 | 31 | 37 | 18 | 31 | 20 | 21 | 19 | 21 | 12 | **23** |
| Indoor Gym/ Sports Facility | 8 | 10 | 13 | 12 | **11** | 10 | 18 | 13 | 18 | 12 | 13 | 18 | 12 | 18 | 15 | 22 | 17 | **13** |
| Cinema | 25 | 25 | 30 | 25 | **27** | 44 | 47 | 36 | 39 | 40 | 29 | 38 | 30 | 47 | 33 | 49 | 30 | **35** |
| Restaurant | 59 | 41 | 68 | 47 | **55** | 64 | 64 | 58 | 51 | 69 | 66 | 70 | 47 | 67 | 58 | 71 | 58 | **60** |
| Café/Coffee Shop | 35 | 25 | 37 | 40 | **35** | 42 | 41 | 37 | 42 | 52 | 44 | 55 | 38 | 53 | 37 | 57 | 48 | **40** |
| Pub/Bars | 26 | 27 | 42 | 19 | **30** | 51 | 34 | 40 | 40 | 53 | 38 | 51 | 52 | 46 | 43 | 41 | 36 | **38** |
| Nightclub | | | | 2 | **1** | 6 | 4 | 2 | 6 | 3 | | | 6 | | 2 | 10 | 1 | **3** |
| Social Club | 7 | 3 | 2 | 6 | **4** | 5 | 2 | 4 | 1 | | 14 | 4 | 10 | | 3 | 10 | 1 | **5** |
| Ten Pin Bowling | 14 | 2 | 2 | 6 | **6** | 17 | 9 | 10 | 4 | 13 | 2 | 14 | 15 | 9 | 24 | 8 | 11 | **9** |
| Bingo | 5 | 2 | 1 | 2 | **2** | 8 | | 4 | | 1 | 1 | | 13 | 11 | 2 | 1 | 4 | **3** |
| Theatre/ Concert Hall | 25 | 22 | 38 | 34 | **31** | 49 | 35 | 29 | 33 | 33 | 32 | 38 | 34 | 32 | 21 | 35 | 34 | **35** |
| Museum/Art Galleries | 11 | 9 | 25 | 9 | **15** | 27 | 17 | 25 | 27 | 27 | 15 | 27 | 33 | 19 | 15 | 29 | 22 | **20** |
| None Mentioned | 22 | 26 | 14 | 21 | **20** | 5 | 8 | 16 | 20 | 11 | 16 | 6 | 22 | 12 | 19 | 7 | 16 | **14** |

*Source: Question 19 of the NEMS Household Survey, Appendix A*

9.2.2 Within the Ipswich ICA a similar pattern of leisure participation occurs although it is noted that, when compared to the study area average, despite respondents generally benefiting from a wider range of commercial leisure facilities in the Ipswich urban area, participation levels are lower across all leisure activities. Indeed, 20% of respondents in the Ipswich ICA stated that they didn't undertake any of the mentioned leisure activities, which when compared to the study area average, is 6% higher.

9.2.3 In terms of the Suffolk Coastal district area (excluding Ipswich Eastern Fringe) (broadly zones 8-16), participation levels, when compared to the study average, are higher in the following commercial leisure activities: indoor gym/sport facility (+4%), cinema (+4%), café/coffee shop (+8%), pubs/bars (+5%), and museum/art galleries (+6%). A similar level of participation levels were recorded in terms of the following leisure activities: restaurant, Bingo, night club, and theatre/concert hall. Some 15% of respondents identified that they didn't participate in any of the mentioned leisure activities which is comparable to the study area average of 14%.

9.2.4 Whilst the lower leisure activity participation rates in the Ipswich ICA could suggest that there may be deficiencies in existing commercial leisure provision in the Ipswich area this is not necessarily reflected in what leisure facilities respondents would like to see more of in their area. Figure 9.2 below shows that, when asked which leisure facilities they would like to see more of in the area, the majority of respondents (63%) in the Ipswich ICA stated 'none'. The lower leisure activity participation rates may however be as a result of respondents in the Ipswich ICA simply not undertaking the mentioned leisure activities.

**Figure 9.2: Leisure Facilities that Respondents would like to see more of, by zone (%)**

| Activity | 1 | 2 | 3 | 4 | Ipswich ICA Av. | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Study Area Av. |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Indoor Gym/ Sports Facility | | | 1 | 1 | **1** | 2 | 3 | 3 | 3 | | | 10 | 7 | 7 | 9 | 9 | 5 | **2** |
| Cinema | 1 | | 2 | 4 | **2** | 23 | | 2 | | 1 | 1 | 3 | 1 | 7 | 2 | 2 | 9 | **6** |
| Restaurant/ Cafe | 1 | 1 | 3 | | **1** | | 1 | 2 | 1 | | 2 | 4 | 2 | 1 | | 2 | | **1** |
| Ten Pin Bowling | 1 | | | | **0** | 3 | 4 | | | 1 | 1 | | | 3 | | | | **1** |
| Pub/Bars | 1 | 2 | 1 | 2 | **1** | 1 | 2 | 1 | 1 | 1 | | 2 | 4 | 3 | 5 | | | **1** |
| Swimming Pool | 9 | 4 | 7 | 6 | **6** | 8 | 7 | 5 | 4 | 7 | 4 | 6 | 12 | 17 | 10 | 2 | 28 | **7** |
| Leisure Centre | 1 | | 1 | 1 | **1** | 4 | 8 | 1 | 2 | 3 | | 5 | 2 | 1 | 9 | 1 | 10 | **3** |
| Theatre/ Concert Hall | 1 | | 3 | | **1** | 2 | 1 | 2 | | 2 | 1 | 8 | | | 1 | 1 | 1 | **1** |
| Museum/Art Galleries | | | 2 | | **1** | | | 1 | 1 | | | | | | 1 | | | **>1** |
| None | 68 | 70 | 64 | 50 | **63** | 47 | 48 | 70 | 66 | 63 | 80 | 61 | 54 | 59 | 48 | 63 | 35 | **58** |

*Source: Questions 28 of the NEMS Household Survey, Appendix A*

9.2.5 Figure 9.2 shows that the majority of respondents in the survey area (58%) considered that no further leisure facilities were needed in the area. Of those that would like to see more leisure facilities in the area the most popular were a swimming pool facility (7%) and cinema facility (6%). A larger proportion of respondents within the Suffolk Coastal district area than the Ipswich Borough area would like to see more of both facilities. No other leisure facility achieved a response rate of more than 3% suggesting that respondents are satisfied with other existing leisure facilities in the two administrative areas.

## 9.3 Restaurant & Cafés/Coffee Shops

9.3.1 Figures 9.3 and 9.4 summarise the proportion of restaurant and café/coffee shop trips which are directed to facilities within and outside the Ipswich and Suffolk Coastal authority areas, based upon the results of the household survey.

**Figure 9.3: Study Area Market Share for Restaurant Visits, by Zone (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ipswich Town Centre (TC) | 34 | 61 | 39 | 40 | 9 | 5 | 8 | 8 | 6 | 3 | 6 | 4 | 2 | 7 | 10 | | 18 |
| Ipswich Waterfront | 11 | 9 | 5 | 7 | 1 | 5 | | 3 | 2 | 1 | | 2 | | | 1 | | 4 |
| Other | 11 | 3 | 7 | 31 | 3 | 1 | 5 | 3 | 5 | 13 | 2 | 2 | 3 | 1 | | | 3 |
| **Ipswich Borough Total** | **57** | **74** | **52** | **78** | **13** | **11** | **13** | **15** | **13** | **16** | **7** | **8** | **5** | **8** | **11** | | **28** |
| Woodbridge TC | | 3 | 14 | 2 | 2 | | | 51 | 68 | 3 | 60 | 29 | 19 | 3 | 3 | | 9 |
| Felixstowe TC | 10 | 2 | 1 | | | | 1 | 1 | 5 | 67 | | | | | | | 6 |
| Felixstowe Waterfront | 2 | | | | | | | | 1 | 8 | | | | | | | 1 |
| Aldeburgh TC | | | | | | | | 3 | 1 | | 5 | 5 | 5 | 18 | 41 | | 2 |
| Saxmundham TC | | | | | | | | | | | 2 | 1 | | 47 | 1 | | 1 |
| Framlingham TC | | | | | | | 2 | | 1 | | | 8 | 32 | | | 1 | 1 |
| Leiston TC | | | | | | | | | | | | | | | 7 | 2 | >1 |
| Villages/Other | 2 | 6 | 28 | 7 | | 1 | | 20 | 7 | 5 | 14 | 22 | 18 | 8 | 18 | 3 | 8 |
| **Suffolk Costal Total** | **14** | **10** | **43** | **9** | **2** | **1** | **3** | **75** | **82** | **82** | **82** | **65** | **73** | **75** | **70** | **6** | **28** |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Bury St Edmunds | | 2 | 1 | | 2 | 54 | 15 | 1 | 1 | 2 | | 1 | 6 | | | | 10 |
| Stowmarket | | | | | | 21 | 36 | | | | | | | | | | 5 |
| Sudbury | | | | | 21 | | | | | | 1 | | | | | | 4 |
| Hadleigh | | 2 | | | 13 | | | | | | | | | | | | 3 |
| Colchester | 13 | | | | 14 | | 4 | | | | | | | | | | 4 |
| Central London | 2 | | 2 | | 5 | | 5 | 2 | | | 2 | 3 | 13 | 2 | | | 2 |

**Figure 9.4: Study Area Market Share for Café/Coffee Shop Visits, by Zone (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Ipswich Town Centre (TC) | 84 | 79 | 40 | 64 | 16 | 6 | 11 | 3 | 5 | 5 | 6 | 9 | 1 | | 1 | | 25 |
| Ipswich Waterfront | 2 | | 7 | 2 | | | | 1 | 1 | | | | | | | | 1 |
| Other | | | 15 | 20 | | | | 2 | | | | | | 2 | | 1 | |
| **Ipswich Borough Total** | **86** | **79** | **62** | **86** | **16** | **6** | **11** | **7** | **6** | **5** | **9** | **9** | **1** | **2** | **1** | **1** | **30** |
| Woodbridge TC | | 5 | 18 | 4 | | | | 68 | 75 | 2 | 76 | 26 | 6 | 15 | 9 | | 12 |
| Felixstowe TC | 9 | | 2 | 2 | | | | 2 | 4 | 74 | | | | | | | 7 |
| Felixstowe Waterfront | | 3 | 2 | | | | | | | 12 | | | | | | | 1 |
| Aldeburgh TC | | | | | | | | 2 | | | 2 | | | 4 | 25 | | 1 |
| Saxmundham TC | | | | | | | | | 2 | | 1 | | 3 | 54 | 19 | 16 | 3 |
| Framlingham TC | | | | | | | 3 | 2 | | | | 16 | 73 | | | 3 | 2 |
| Leiston TC | | | | | | | | 2 | | | | | | | 37 | | 1 |
| Villages/Other | | 4 | 7 | | 2 | | | 7 | 7 | 3 | 9 | 18 | 8 | 8 | 4 | | 3 |
| **Suffolk Costal Total** | **9** | **12** | **29** | **6** | **2** | | **3** | **83** | **88** | **91** | **88** | **60** | **90** | **81** | **93** | **19** | **30** |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Bury St Edmunds | | 4 | | | 2 | 57 | 14 | 2 | | 2 | | | 4 | | | | 9 |
| Stowmarket | 3 | | | | | 26 | 28 | | | | | 2 | | | | | 5 |
| Sudbury | | | | | 32 | | | | | | | | | | | | 6 |
| Colchester | | | 3 | | 22 | | | | | | | | | | | | 5 |
| Interchange Retail Park | | | | 2 | 4 | 4 | | | | | | | | | | | 2 |
| Central London | | | 2 | | 5 | | 3 | | | | | | | 7 | | | 2 |

*Source: Questions 22 & 23 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.3.2 Figures 9.3 and 9.4 show that:

- Ipswich – retains the majority (between 52-78%) of restaurant visits from the Ipswich ICA zones (Zones 1-4) with the town centre being the most popular destination. The Waterfront attracts between 5-11% of trips from the ICA zones. Restaurants in Ipswich Borough also draw more than 10% of visits from Zones 5-10 and 15. In terms of café/coffee shop visits, Ipswich retains a higher level (between 62-86%) of such trips from within the Ipswich ICA. However, Ipswich's café/coffee shop draw from the wider study area is not as strong - drawing less than 10% of visits from all other zones, with the exception of Zones 5 and 7. It is noted that restaurant and café/coffee shop facilities in Woodbridge Town Centre, Felixstowe Town Centre, Suffolk Coastal district villages, and Colchester partly influence restaurant and café/coffee shop trip patterns from within the Ipswich ICA.
- Woodbridge – respectively retains 51% and 68% restaurant market share and 68% and 75% of café/coffee shop market share from Zones 8 and 9 (Woodbridge Zones). It also captures 60% of restaurant and 76% café/coffee shop market share from neighbouring Zone 11 (Woodbridge Rural East). It is evident the town centre also draws from a wider area attracting between 10-30% restaurant trips from Zones 3, 12 and 13 and between 15-26% café/coffee shop trips from Zones 3, 12, and 14. Overall, the identified retention levels are considered to be good with the survey results indicating that the town centre is an attractive destination for both restaurant and café/coffee shop visits.
- Felixstowe – captures a healthy level of both restaurant and café/coffee shop visits from its zone (75% of restaurant and 86% of café/coffee shop visits from Zone 10). Restaurant and café/coffee shop facilities have little influence on visits from other survey zones, although it is noted that they capture 12% of restaurant visits and 9% of café/coffee shop visits from Zone 1. Given that the town attracts fewer trips from closer zones (Zones 3, 4 and 9) it is not clear why the town attracts a larger proportion of visits from Zone 1.
- Saxmundham – retains around half of the restaurant and café/coffee shop trips from its zone (Zone 14). With the exception of Saxmundham, the most popular destination for restaurant trips are Aldeburgh Town Centre, Ipswich Town Centre, and villages in Suffolk Coastal district. Woodbridge Town Centre and villages in the Suffolk Coastal district have an influence on café/coffee shop trips in Saxamundham's zone. Café/coffee shop facilities in Saxmundam also attract a proportion of residents from neighbouring Zone 15 and 16 which is likely to be in part as a result of linked food shopping trips.
- Aldeburgh – respectively captures 41% and 25% of restaurant and café/coffee shop market share from its zone (Zone 15 (shared with Leiston)). Restaurants in Ipswich Town Centre and villages in Suffolk Coastal district have an influence on trips in the Aldeburgh/Leiston Zone attracting 10% and 18% of trips respectively.

- Framlingham – retains 32% of restaurant trips from its zone (Zone 13). It also draws 8% of trips from neighbouring Zone 12. Woodbridge Town Centre is the second most popular location for restaurant trips drawing 19% of trips from Framlingham's zone. In terms of café/coffee shop trips, the town centre retains a higher proportion of trips from its zone (73%). It also draws 16% of such trips from neighbouring Zone 12.
- Leiston – reflecting the limited restaurant provision in the town, Leiston only retains 7% of restaurant trips from its zone (Zone 15 (shared with Aldeburgh)). Aldeburgh is the most popular destination for restaurant trips in Zone 15. Leiston retains a higher proportion of café/coffee shop visits from its zone (37%), higher than that retained by Aldeburgh (25%). Leiston does not attract any notable restaurant or café/coffee shop trips from other survey zones.

9.3.3 The influence of restaurant and café/coffee shop facilities outside the two administrative areas is primarily felt on the following survey zones:

- Zone 5 – Sudbury and Colchester
- Zones 6 & 7 – Bury St Edmunds and Stowmarket
- Zone 16 – Halesworth, Lowestoft, and Southwold

9.3.4 Given the location of these towns either within or adjacent to the respective survey zones the level of influence is not surprising or a particular cause for concern.

9.3.5 Overall, restaurant and café/coffee shop visit retention levels within both the Ipswich ICA and Suffolk Coastal district zones are considered to be generally healthy.

### Quantitative Need Assessment

9.3.6 The statistical tables at **Appendix Q** set out a quantitative need/capacity assessment for potential new restaurant and café/coffee shop provision in Ipswich Town Centre and town centres in the Suffolk Coastal district. The findings of our quantitative assessment are summarised below.

#### Per Capita Expenditure Growth (Table 1)

9.3.7 Over the plan period restaurant and café/coffee shop expenditure is expected to grow significantly. Experian forecast that UK per capita expenditure on restaurant and café/coffee shop expenditure will increase by approximately 22% between 2017 and 2036.

9.3.8 Utilising the Experian Micromarketer G3 data, it is anticipated that average per capita food and drink expenditure in the study area is expected to increase from £723 per annum at 2017 to £880 per annum by 2036 (average of the 16 survey zones).

**Available Expenditure (Table 2)**

9.3.9 Table 2 applies expenditure per capita figures for each zone from Table 1 to the current and forecast population.

9.3.10 Applying the study area expenditure per capacity figure to the current and projected study area population it is anticipated that restaurant and café/coffee shop expenditure within the study area will increase by £121.3m within the plan period (from £329.1m at 2017 to £451.1m by 2036).

**Study Area Market Share Patterns (Tables 3a, 3b & 4a, 4b and 4c)**

9.3.11 Tables 3a and 3b set out the market share of restaurant and café/coffee shop visits from within the study area. The market share patterns are reproduced in Figure 9.3 and 9.4 and have previously been summarised at paragraphs 9.3.2 and 9.3.3.

9.3.12 Tables 4a and 4b details the estimated turnovers of restaurant and café/coffee shop facilities. The turnover is calculated by applying the relevant zonal available expenditure (Table 2) to the market share patterns (Tables 3a and 3b). Having regard to the size of the centre, type of facilities, and role and function of the centre we have made an estimate on the level of inflow anticipated to be drawn from beyond the survey area. The assessed levels of inflow are set out in the final two columns of Table 4a and 4b.

9.3.13 Table 4c sets out the combined restaurant and café/coffee shop turnover patterns of facilities. Table 4c has been derived by adding the turnover estimates set out in Tables 4a and 4b.

**Quantitative Capacity (Tables 5a & 5b)**

<u>Ipswich Town Centre</u>

9.3.14 Facilities in the Ipswich Town Centre and the Waterfront currently claim £75.6m of restaurant and café/coffee shop expenditure generated by residents of the Study Area at 2017 which equates to a market share of 22.9%.

9.3.15 Given the planned restaurant and café/coffee shop provision along the Waterfront and the existing provision in the town centre, in identifying future floorspace capacity projections, we consider it appropriate to make an allowance for an increase in Ipswich Town Centre/Waterfront market share. Table 5a therefore makes an allowance for a 10% uplift in market share from 22.9% to 25.2% from 2021. We consider this level of market share uplift to be reasonable given the amount of floorspace envisaged along the Waterfront and the qualitative deficiencies in town centre restaurant provision identified in Section 6. The impact of the uplift in market share is anticipated to primarily be felt on the larger centres outside Ipswich/Suffolk Coastal areas and facilities outside Ipswich Town Centre.

9.3.16 After making an allowance for an uplift in market share and making provision for inflow deriving from visitors to the Study Area, we estimate that facilities in Ipswich Town Centre/the Waterfront will attract £89.3m of expenditure at 2021, increasing to £96.9m at 2026, to £105.2m at 2031, and to £114.0m at 2036.

9.3.17 Given the forecast increases in restaurant and café/coffee shop expenditure and population and allowing for year on year increases in the productivity of existing floorspace, we estimate that by 2021 there will be an expenditure surplus of £12.2m to support additional restaurant and café/coffee shop floorspace within Ipswich Town Centre/the Waterfront. This surplus is forecast to increase to £16.3m at 2026, to £21.1m at 2031 and then to £26.0m at 2036. Account has been made for the turnover efficiency of existing floorspace to increase (on the basis that operators are generally able to make their existing floorspace more productive over time).

9.3.18 Applying an appropriate average restaurant/café/coffee shop sales density for Ipswich (£5,000/sq m) the surplus equates to a potential floorspace requirement of 2,235sq m net at 2021, increasing to 2,871sq m net at 2026, to 3,564sq m net by 2031, and increasing further to 4,231sq m by 2036.

**Figure 9.5: Restaurant & Café/Coffee Shop Floorspace Projections – Ipswich Town Centre/the Waterfront**

| Floorspace (sq m net) | | | |
|---|---|---|---|
| **2021** | **2026** | **2031** | **2036** |
| 2,235 | 2,871 | 3,564 | 4,231 |

*Source: Table 5a, Appendix Q*

Suffolk Coastal District Town Centres

9.3.19 Having regard to the size and role of town centres in the Suffolk Coastal district we consider the restaurant and café/coffee shop retention rates currently experienced by the centres are reasonable. We also understand that the majority of the centres are, for various reasons, physically constrained in terms of being able to meet significant additional restaurant/café/coffee shop provision. Accordingly, an appropriate strategy for Suffolk Coastal District Council should be for town centres to maintain their existing market shares.

9.3.20 Apart from not allowing for an increase in market share, in identifying restaurant and café/coffee shop floorspace capacity projections for town centres in the Suffolk Coastal district, we have undertaken the same capacity exercise as that undertaken for Ipswich Town Centre/the Waterfront.

9.3.21 Figure 9.6 below summarises the floorspace projections for each of the town centres in the district. It identifies a potential restaurant and café/coffee shop floorspace requirement for Woodbridge Town Centre of circa 1,000sq m net within the plan period. For Felixstowe Seafront, a floorspace requirement of circa 600sq m net is identified by the end of the plan period. In terms of the smaller town centres in the district only limited (less than 200sq m net) floorspace requirements are identified.

**Figure 9.6: Restaurant & Café/Coffee Shop Floorspace Projections – Suffolk Coastal Towns**

| | Floorspace (sq m net) | | | |
|---|---|---|---|---|
| | 2021 | 2026 | 2031 | 2036 |
| Woodbridge Town Centre | 235 | 486 | 759 | 1,023 |
| Felixstowe Town Centre/Seafront | 135 | 279 | 436 | 587 |
| Saxmundham Town Centre | 48 | 98 | 154 | 207 |
| Aldeburgh Town Centre | 39 | 81 | 127 | 170 |
| Framlingham Town Centre | 30 | 61 | 96 | 129 |
| Leiston Town Centre | 11 | 24 | 37 | 50 |

*Source: Table 5b, Appendix Q*

## Qualitative Need Assessment

9.3.22 Qualitative assessments of Ipswich Town Centre and town centres in the Suffolk Coastal district are set out in Sections 6 and 7 respectively. These are summarised and discussed, in so far as they are relevant to restaurant and café/coffee shop provision, further below.

<u>Ipswich Town Centre</u>

9.3.23 We have identified that the proportion of town centre units in café/restaurant use is recorded to be slightly below the UK average. However, The Buttermarket Shopping Centre was still undergoing redevelopment/refurbishment for leisure uses at the time of our survey (January 2017). Since the survey an additional number of food and drink units have opened. We understand the remaining food and drink units are likely to be occupied in the coming months. The redevelopment provides a number of good quality food and drink outlets including Wagamama, The Cosy Club, Prezzo, Coast to Coast, and Byron Burger. Following the opening of all the food and drink outlets at the Buttermarket, will be closer, if not identical, to the UK average. Furthermore, as noted in Section 5 there are also a number of café/restaurants located along the Waterfront which further add to the provision of food and drink in the town centre.

9.3.24 Whilst restaurant and café/coffee shop provision has significantly improved recently there are still a number of national food and drink operators not present in the town centre. National operators not present include: Five Guys, Pret a Manger, Coal Grill and Bar, Carluccio's, Brasserie Blanc, Gourmet Burger Kitchen, Yo Sushi, Giraffe, Itsu, TGI Friday's, Doughocracy, Cote Brasserie, Bill's Restaurant, Joe's Kitchen, Barburrito, Ed's Easy Diner, Bella Italia, Jamie's Italian, and Wahaca. We understand Pret a Manger are opening prior to Christmas 2017.

9.3.25 Our assessment has identified that a number of the above national operators have an outstanding requirement for presence in the town centre (although Five Guys has informed us that following the opening of Byron Burger in The Buttermarket Shopping Centre their requirement is not on their priority list).

9.3.26 It is noted that whilst an improvement in the choice and range of restaurants and cafes/coffee shops was not cited by household survey respondents as a measure that would encourage them to visit the town centre more often, we consider, given the existing provision, the retention levels, and outstanding requirements from operators there is a clear qualitative need to improve restaurant and café/coffee shop provision in the town centre. Our assessment is supported by stakeholders who identified the provision of new quality restaurants as one of the opportunities/ways to improve the town centre.

9.3.27 It is important that the provision of new restaurant and cafes/coffee shops within Ipswich Town Centre does not harm the provision of A1 uses in the town centre. In the primary shopping frontage zone, the focus should be on A1 uses first. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and the Waterfront area. Each planning application proposal will need to be assessed on its own merits and against relevant development plan policy.

Woodbridge Town Centre

9.3.28 Our qualitative assessment of Woodbridge has identified that the town centre provides a reasonable range of restaurant and café/coffee shop outlets. The household telephone survey has highlighted that 29% of respondents identify that their main reason to visit the town centre was to visit a restaurant/café. The survey results also show that town centre restaurant and café/coffee shop trip retention levels are good.

9.3.29 Stakeholders consider that there are good eating and drinking facilities in the town centre. Indeed, we note that respondents did not identify improved/increased range of restaurants/café's as a measure that would encourage them to visit the town centre more often.

9.3.30 Overall, our assessment of the town centre, the survey findings, and feedback from stakeholders, identify that the town centre is an attractive and popular destination for both restaurant and café/coffee shop visits. We do not consider there to be any material qualitative need for additional restaurant and café/coffee shop provision in Woodbridge Town Centre.

Felixstowe Town Centre

9.3.31 Our qualitative analysis of Felixstowe Town Centre has confirmed that it provides a good range of restaurants and cafes/coffee shops. Town centre provision is also complimented by a number of additional restaurants and cafés along the seafront. We agree with stakeholders that the town centre would benefit from improvements to the pedestrian connectivity with the seafront. We consider that restaurant and café/coffee shop uses would be one of the uses which would benefit the most from further linked trips.

9.3.32 The household survey results identify that the town centre retention levels of both restaurant and café/coffee shop visits are healthy. No qualitative deficiencies identified either by stakeholders or respondents of the household telephone survey.

Saxmundham Town Centre

9.3.33 We have identified that whilst the proportion of town centre units and floorspace in restaurant and café provision in below the UK average, given the size and role of the town centre, the healthy retention levels, and the fact that additional café/coffee shop provision is provided in the Waitrose store, we do not consider that there is a deficiency in restaurant and café/coffee shop provision in Saxmundham Town Centre.

Aldeburgh Town Centre

9.3.34 Our qualitative analysis identifies that Aldeburgh Town Centre provides a strong restaurant and café/coffee shop offer. Of the 83 units in the town centre 10 (12%) are occupied by restaurants/café's/coffee shops. The restaurant and café/coffee shop provision is predominantly run by independent operators and serves both the local population and visitor market.

9.3.35 Whilst the town centre retention rates of restaurant and café/coffee shop trips are slightly lower than what we had anticipated we consider that there are no qualitative deficiencies with the range and number of restaurant and café/coffee shop provision in the town centre. We note no qualitative issues were raised by either respondents from the household survey or stakeholders

Framlingham Town Centre

9.3.36 For its size and role Framlingham Town Centre provides a good range of restaurant and cafés/coffee shops. Our analysis identifies that there are no obvious qualitative deficiencies in the choice and range of restaurants and cafés/coffee shops in the town centre. Of particular note:

- 13% (8 units) of town centre units are occupied by restaurant and café/coffee shop operators;
- stakeholders consider that the town centre provides a variety of nice food and drink facilities;
- the choice and range of restaurants/cafes was the 5th most popular answer given by survey respondents when asked what they most liked about the town centre; and
- qualitative improvements to the choice and range of restaurants/cafes was not identified by survey respondents as a suggestion that would encourage them to visit the centre more often or by stakeholders as an opportunity/way to improve the town centre.

Leiston Town Centre

9.3.37 Our qualitative analysis identifies that the town centre provides three restaurant and cafes/coffee shops. Whilst this implies that there is limited provision in the town centre a number of the public houses and Indian/Chinese take away outlets in the town centre also provide 'eat in' facilities. We also note that there is a Subway sandwich shop concession in the Co-op foodstore and Simply Delicious Health Food also provides a coffee shop.

9.3.38 The household survey identifies good retention levels and the provision of restaurant and café/coffee shops in the town centre was not raised as an issue by respondents or stakeholders

9.3.39 Overall, given its size, we consider there to be a reasonable range and quantity of restaurant and café/coffee shop provision in Leiston Town Centre.

## 9.4 Health and Fitness

9.4.1 As identified in Figure 9.2, the household survey indicates that 13% of respondents in the Study Area visit indoor health and fitness facilities. Of the participating respondents, the main destinations mentioned are summarised in Figure 9.7 below.

**Figure 9.7: Study Area Market Share for Indoor Health & Fitness by Zone (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ipswich Borough** | | | | | | | | | | | | | | | | | |
| Ipswich Town Centre | 54 | 90 | 12 | 26 | 10 | | | | 15 | 6 | 11 | 6 | | | | | 14 |
| Other | 38 | 10 | 50 | 74 | | | | 27 | 26 | | 4 | | | 6 | | | 17 |
| Ipswich Total | 92 | 100 | 62 | 100 | 10 | | | 27 | 41 | 6 | 15 | 6 | | 6 | | | 31 |
| **Suffolk Coastal District** | | | | | | | | | | | | | | | | | |
| Ipswich Eastern Fringe | | | 30 | | 9 | 4 | | 22 | 13 | | 37 | 8 | | 4 | | | 9 |
| Woodbridge | | | | | | | | 23 | | | 13 | 16 | 19 | | | | 3 |
| Felixstowe | 8 | | | | | | | | 28 | 94 | | 17 | | | | | 9 |
| Framlingham | | | | | | | | | | | | 13 | 59 | | | | 2 |
| Leiston | | | | | | | | | | | 11 | | | 72 | 100 | 12 | 6 |
| Other | | | | | | 11 | | 19 | 6 | | 20 | | 4 | | | | 5 |
| Suffolk Costal Total | 8 | | 30 | | 9 | 15 | | 64 | 47 | 94 | 81 | 55 | 82 | 76 | 100 | 12 | 33 |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Stowmarket | | | | | | 53 | 55 | | | | | 5 | | | | | 13 |
| Bury St Edmunds | | | | | | 28 | | | | | | | | | | 14 | 6 |
| Colchester | | | | | 20 | | | | | | | | | | | | 2 |
| Halesworth | | | | | | | | | | | | | | | | 32 | 2 |

*Source: Questions 20 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.4.2 Ipswich Borough attracts 31% of indoor health and fitness trips within the study area whilst facilities in Suffolk Coastal District collectively attract 33% of trips. The retention rate of indoor health and fitness trips within the Ipswich ICA is high with each of the four zones (1-4) retaining at least 92% of trips. In addition to attracting the majority of trips within the Ipswich ICA, facilities in Ipswich Borough also attract trips from the Suffolk Coastal district area (Zones 8, 9, 10, 11, 12 and 14).

9.4.3 In terms of indoor health and fitness trips to facilities in the Suffolk Coastal District the following is noted:

- Felixstowe - attracts trips primarily from its zone (Zone 10 - Felixstowe). It also attracts trips from neighbouring Zone 9 (Woodbridge South) and to a lesser extent from Zone 12 (Wickham Market) and Zone 1 (Ipswich South West).
- Woodbridge - generally attracts trips from its local zones (Zones 8 and 11) but also attracts some trips from zones to the north: Zone 12 (Wickham Market) and Zone 13 (Framlingham).
- Framlingham - retains the majority of indoor health and fitness trips from its zone (Zone 13) but also attracts some trips (13%) from neighbouring Zone 12 (Wickham Market).
- Leiston – attracts the majority of trips from Zone 14 (Saxmundham) and 15 (Leiston/Aldeburgh). Facilities in the town also attract trips from Zone 11 (Woodbridge East) to the south and Zone 8 (Woodbridge West).
- Saxmundham/Aldeburgh – the household survey identified that no indoor health and fitness trips were attracted to either of these towns. This is not surprising considering the lack of/limited provision in both towns.

9.4.4 Turning to health and fitness facilities outside the Ipswich and Suffolk Coastal administrative areas, Stowmarket draws the majority of trade from Zones 6 and 7 which is not surprising as it 'straddles' these zones and Halesworth attracts the largest number of indoor health and fitness trips from Zone 16, which again is primarily as a result of its location with the zone. Bury St Edmunds and Colchester have an influence on trips in Zone 5 and 6 due to their location immediately adjacent to each zone.

9.4.5 In terms of improvements to Ipswich Borough's indoor health and fitness facilities only 1% of respondents from the Ipswich ICA suggested that improvements were needed for indoor sport and health and fitness provision, which indicates that respondents are generally satisfied with the current provision in Ipswich. A higher proportion of respondents (excluding Ipswich eastern fringe area) in the Suffolk Coastal District (up to 10% in some zones) suggested improvements were needed to indoor sport and health and fitness provisions in the district, which albeit still relatively low, suggests some dissatisfaction with the current provision (with the exception of Felixstowe where 0% of respondents in its zone suggested improvements).

9.4.6 In assessing the potential requirement for additional health and fitness facilities, having regard to the increase in population in the study area, there is likely to be a quantitative need for new health and fitness gym facilities. We have sought to quantify the likely requirements in each authority area, based on current rates of participation, in Figure 9.8 below. In considering the requirements set out below it should be noted that a new modern conveniently located indoor health and fitness facility is likely to result in some new gym members and in turn an uplift in participation rates.

**Figure 9.8: Health and Fitness Gym Requirement in Ipswich Borough**

| Year | Study Area Population Increase | Typical Population Required to Support New Gym | Study Area Custom Claimed by Ipswich Borough | Potential No. of Gyms Supported in Ipswich Borough | Study Area Custom Claimed by Suffolk Coastal District | Potential No. of Gyms Supported in Suffolk Coastal District |
|---|---|---|---|---|---|---|
| 2017-2036 | 58,625 | 2,800 - 3,500 | 31% | 5.2-6.5 | 33% | 5.5-6.9 |

*Note: Typical population required to support new gym sourced from information published by gym operators (including company account reports/accounts)*

9.4.7 The increase in population anticipated in the Study Area in the period to 2036 is 58,625. Applying the participation rate for indoor health and fitness gym facilities for Ipswich Borough (31%) and Suffolk Coastal District (33%) this identifies potential for 18,174 new gym members for Ipswich Borough and 19,346 new members for Suffolk Coastal District.

9.4.8 Information published by a number of health and fitness operators identify that typical/average members per health and fitness gym facility ranges from 2,800 to 3,500 members.[29] Based on the typical/average members per health and fitness facility there is a requirement for 5.2-6.5 health and fitness gyms in Ipswich Borough and 5.5-6.9 health and fitness gyms in the Suffolk Coastal District.

9.4.9 In summary, whilst there is not considered to be a general qualitative deficiency in existing indoor sport/health, and fitness facilities in the two administrative areas and there are currently no requirements from sports/health and fitness operators, based on the current rates of indoor health and fitness participation, there is likely to be a quantitative need for between 5-7 new additional facilities in the plan period within each of the two council administrative areas.

## 9.5 Cinema

9.5.1 At the time of the household telephone survey there was one purpose built multi-screen cinema present within the Ipswich administrative area, namely the Cineworld at Cardinal Park which accommodates 11 screens. The Ipswich Film Theatre, located at Corn Exchange, also provides 2 screens with screenings limited to between 2-4 showings a day.

[29] Mintel Health & Fitness Clubs- UK, 2016

9.5.2 Since the survey, a 14 screen cinema, operated by Empire, has opened within the Buttermarket Shopping Centre. As a result of the opening of the Empire Cinema the number of cinema screens has more than doubled (from 13 to 27 screens).

9.5.3 Cinema provision in Suffolk Coastal district is of a small scale, predominantly run by independents/community. Provision includes:

- <u>The Palace, Crescent Road, Felixstowe (2 screens)</u> – The cinema/bingo hall has 2 daily showings of current blockbuster films and an additional daily showing of recently released films. In addition to the blockbuster screenings The Palace also offers Event Cinema including live theatre and event broadcasts from the Royal Opera House, National Theatre Live and Royal Shakespeare Company Live.
- <u>The Riverside, Quayside, Woodbridge (1 screen)</u> - includes a restaurant and bar. The cinema is also a theatre. There are up to 3 screenings per day of current blockbuster films and also live screenings of ballet and opera performances.
- <u>Leiston Film Theatre, High Street, Leiston (1 screen)</u> - In addition to showing films the film theatre also stages various entertainment shows, music performances, pantomimes and live screenings of ballet.
- <u>Aldeburgh Cinema, High Street, Aldeburgh (1 screen)</u> - The cinema has one screen and generally shows two screenings per day. In addition to showing films, special events are held at the cinema and include live theatre, opera, art exhibitions and ballet transmissions from the National Theatre, New York's Metropolitan Opera, the Royal Opera House, the National Gallery, the British Museum and Moscow's Bolshoi Ballet.

9.5.4 Figure 9.9 shows that 38% of cinema trips which originate within the Study Area are secured by the Cineworld in Ipswich. More than 89% of all cinema trips in Zones 1, 2 and 4 are undertaken at the Cineworld Cinema. The cinema also attracts trips from all other survey zones, apart from the uppermost northern zone, Zone 16 (Halesworth). 4% of cinema trips which originate within the Study Area are also secured by the Ipswich Film Theatre with between 7% and 10% of trips in Zones 1, 2, 3 and 5 undertaken at the 2 screen cinema.

9.5.5 Figure 9.9 identifies that whilst the Cineworld multi-plex cinema does have an influence on cinema visits in the Suffolk Coastal district the small 1-2 screen cinemas in the district are currently retaining a significant number of trips from district residents. Of particular note, the cinema's capture a good proportion of trips in Zones 8 – 15 (between 47%-89%).

9.5.6 In terms of the Ipswich ICA, cinema facilities in Ipswich retain a significant proportion (over 90%) of cinema visits from Zone 1, 2 and 4. In terms of Zone 3, Ipswich also retains a high level of cinema visits (68%), with nearly a quarter (24%) of cinema visits taking place at The Riverside in Woodbridge and 8% of visits at The Palace in Felixstowe. The level of cinema trips in Zone 3 that are taking place in both Woodbridge and Felixstowe is not considered to be a concern.

9.5.7 In terms of the influence of cinema's outside Ipswich Borough and Suffolk Coastal administrative areas, the Cineworld in Bury St Edmunds has the largest influence capturing between 14%-48% of trips from Zones 5-7. The Regal Theatre, Stowmarket also has a particular influence on Zones 6 and 7. This is not surprising considering Stowmarket 'straddles' these zones. It is also noted that the Odeon in Colchester attracts 26% of cinema trips from zone 5. Again, this is not surprising having regard to the location of Colchester relative to this zone.

**Figure 9.9: Study Area Market Share for Cinema Visits (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ipswich Borough** | | | | | | | | | | | | | | | | | |
| Cineworld, Cardinal Park | 90 | 89 | 59 | 93 | 23 | 16 | 24 | 19 | 38 | 43 | 32 | 31 | 46 | 21 | 7 | | 38 |
| Ipswich Film Theatre | 7 | 9 | 10 | | 7 | | 3 | 2 | | 3 | 3 | 2 | | | | | 4 |
| Ipswich Total | 96 | 97 | 68 | 93 | 30 | 16 | 27 | 21 | 38 | 46 | 34 | 33 | 46 | 21 | 7 | | 42 |
| **Suffolk Coastal District** | | | | | | | | | | | | | | | | | |
| The Riverside, Woodbridge | | 3 | 24 | 7 | | | | 75 | 46 | | 51 | 35 | 17 | | | 2 | 10 |
| The Palace, Crescent Road, Felixstowe | | | 8 | | | | | | 12 | 49 | 2 | | | | | | 4 |
| Leiston Film Theatre | | | | | | | | | | | 4 | 19 | 16 | 37 | 67 | 28 | 4 |
| Aldeburgh Cinema | 4 | | | | | | | | | | 6 | 11 | 14 | 25 | 22 | 4 | 2 |
| Suffolk Costal Total | 4 | 3 | 32 | 7 | | | | 75 | 58 | 49 | 62 | 65 | 47 | 62 | 89 | 35 | 21 |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Cineworld, Bury St Edmunds | | | | | 14 | 48 | 36 | | | | | | 1 | | | | 14 |
| Abbeygate Cinema, Bury St Edmunds | | | | | 2 | 9 | 2 | 2 | | | | | 1 | | | | 2 |
| Regal Theatre, Stowmarket | | | | | 2 | 27 | 30 | | | | | | 1 | | | | 7 |
| Odeon, Colchester | | | | | 26 | | | | | | | | | | | | 6 |
| Cineworld, Braintree | | | | | 19 | | | | | | | | | | | | 4 |

*Source: Questions 21 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.5.8 Mintel estimates that the UK population on average visits a cinema 2.7 times per annum and that each cinema screen attracts around 42,927 separate admissions. Applying these benchmark averages to the Study Area, we estimate that there will be 1,256,379 cinema admissions arising the Study Area population at 2017, increasing to 1,415,251 admissions by 2036. Based on the assumed number of visits per screen, we calculate that around 29.3 screens can be supported in the Study Area at 2017, increasing to 33.0 screens at 2036. Our calculations are set out below at Figure 9.10.

**Figure 9.10: Cinema Screen Requirement in Study Area**

| Year | Study Area Population | Number of Cinema Visits Per Person | Attendance | Number of Admissions Required to Support Screen | Screens Supported |
|---|---|---|---|---|---|
| 2017 | 465,542 | 2.7 | 1,256,963 | 42,927 | 29.3 |
| 2021 | 478,026 | 2.7 | 1,290,670 | 42,927 | 30.1 |
| 2026 | 493,477 | 2.7 | 1,332,388 | 42,927 | 31.0 |
| 2031 | 508,357 | 2.7 | 1,372,564 | 42,927 | 32.0 |
| 2036 | 524,167 | 2.7 | 1,415,251 | 42,927 | 33.0 |

9.5.9 As shown in Figure 9.11 below, based on the current market share, we would expect around 12.3 cinema screens to be located in the Ipswich administrative area at 2017, increasing to around 13.9 screens at 2036, and for around 6.2 cinema screens to be located in the Suffolk Coastal administrative area at 2017, increasing to around 6.9 screens at 2036.

**Figure 9.11: Cinema Screen Requirement in Ipswich/Suffolk Coastal District**

| Year | Screens Supported | Study Area Custom Claimed by Ipswich | Potential No. of Additional Screens Supported in Ipswich | Study Area Custom Claimed by Suffolk Coastal District | Potential No. of Additional Screens Supported in Suffolk Coastal District |
|---|---|---|---|---|---|
| 2017 | 29.3 | 42% | 12.3 | 21% | 6.2 |
| 2021 | 30.1 | 42% | 12.6 | 21% | 6.3 |
| 2026 | 31.0 | 42% | 13.0 | 21% | 6.5 |
| 2031 | 32.0 | 42% | 13.4 | 21% | 6.7 |
| 2036 | 33.0 | 42% | 13.9 | 21% | 6.9 |

9.5.10 It is evident, following the opening of the Empire Cinema, that Ipswich accommodates a greater number of screens than might be expected based on current market share with the Suffolk Coastal district accommodates a lesser number.

9.5.11 Accordingly, following the recent opening of the state of the art modern 14 screen Empire Cinema in the Buttermarket Shopping Centre, we do not consider there to be any qualitative deficiency in cinema provision in Ipswich.

9.5.12 In terms of cinema provision in the Suffolk Coastal area, whilst no multiplex cinema is present in the district, the towns are not of sufficient size to be able to support or physically accommodate a multiplex facility. Ipswich, as the regional centre is the most appropriate town to meet such requirements. We consider that there is no requirement for qualitative improvements in cinema provision in the district. Having regard to the scale, role and function of the town centres in the sub-regional hierarchy the existing cinema provision in the district (comprising 4 small independent/specialist cinema facilities), together with cinema provision in Ipswich (including the recently opened Empire Cinema), provides sufficient provision for the district population.

## 9.6 Tenpin Bowling

9.6.1 The Ipswich Borough administrative area currently accommodates one permanent tenpin bowling facility, namely the Namco FunScape at Sproughton Road, which has 24 lanes. Namco is located adjacent to a Morrison's foodstore, to the north west of Ipswich Town Centre, in an out-of-centre location. Additional, small scale (3 lanes) 'boutique' ten pin provision was also provided at Bear's Boutique Bowling Bar and American Restaurant to the south of the town centre, off Star Lane. The bowling/restaurant facility closed in 2016 but has recently re-opened as Snooker/Pool facility. As noted previously in Section 6, Superbowl UK have recently opened a 12 lane ten pin bowling centre in the Buttermarket Shopping Centre.

9.6.2 In terms of the Suffolk Coastal district, tenpin bowling provision is limited to 'Tenpin', Gloster Road, Martlesham Heath in the Ipswich Eastern Fringe area. 'Tenpin' provides 20 lanes and achieves the greatest ten pin bowling market share of any facility in the Study Area (38%), followed by Namco FunScape (17%). Within the Ipswich ICA, Namco is the most popular ten pin bowling destination attracting 51% of bowling trips that originate within the Ipswich ICA. Whilst 'Tenpin' attracts a slightly lower level of bowling trips from within the Ipswich ICA (46%), it attracts a larger proportion of trips from within the Suffolk Coastal district and other parts of the Study Area. Of particular note, more than 8 in 10 bowling trips which originate from Zones 8, 9, 10, 11, 12, 13, and 14 are undertaken at 'Tenpin'.

9.6.3 The Study Area retains its lowest market share from Zones 5, 15 and 16. The majority of respondents from Zone 5 undertake their bowling trips at either Strikes in Sudbury (49%) or Namco in Braintree (38%). The influence of Strikes in Sudbury is not surprising considering that the town is located immediately adjacent to the zone. In terms of Zones 15 and 16, Richardson Family Entertainment Centre and the Hollywood Bowl, Norwich, capture the largest number of ten pin bowling trips in the two zones with the 'Tenpin', Martlesham Heath, only attracting 32% of trips from Zone 15 and no trips from Zone 16.

**Figure 9.12: Study Area Market Share for Tenpin Bowling Visits (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ipswich Borough** | | | | | | | | | | | | | | | | | |
| Namco FunScape | 74 | 44 | | 16 | 5 | 16 | 52 | | | | | | | | | | 17 |
| **Suffolk Coastal District** | | | | | | | | | | | | | | | | | |
| Tenpin, Martlesham Heath | 26 | 56 | 100 | 71 | 5 | 43 | 22 | 100 | 93 | 100 | 95 | 100 | 100 | 88 | 32 | | 38 |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Strikes, Sudbury | | | | | 49 | | | | | | | | | | | | 16 |
| Namco, Braintree | | | | | 38 | | | | | | | | | | | | 13 |
| Bury Bowl, Bury St Edmunds | | | | | 4 | 41 | | | | | | | | | | | 7 |
| Hollywood Bowl, Norwich | | | | 13 | | | 26 | | 7 | | | | | | | 61 | 5 |
| Richardsons, Lowestoft | | | | | | | | | | | | | | 4 | 68 | 39 | 3 |

*Source: Questions 25 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.6.4 In terms of the benchmark level of provision, Mintel identify that there were 5,617 bowling lanes across the UK in 2016. Given that the 2016 UK population was approximately 65.1 million, this equates to one lane for every 11,592 persons.

9.6.5 Based on the assumed benchmark identified above, we calculate that around 40.5 tenpin bowling lanes could be supported by the Study Area population at 2017, increasing to 45.4 lanes at 2036. Whilst Figure 9.14 has apportioned these according to current market share, given the location of the 'Tenpin' facility in the Ipswich Eastern Fringe any identified quantitative capacity for Suffolk Coastal district could be provided within Ipswich Borough, although the location of any potential additional provision would need to have regard to accessibility to residents within the Suffolk Coastal district (ie bowling alley provision on the western side of Ipswich would not be particularly accessible to residents in Suffolk Coastal district).

**Figure 9.13: Tenpin Requirement in Study Area**

| Year | Study Area Population | Typical Population Required to Support One Tenpin Lane | Potential Number of Tenpin Lanes Supported by Study Area |
|---|---|---|---|
| 2017 | 465,542 | 11,592 | 40.2 |
| 2021 | 478,026 | 11,592 | 41.2 |
| 2026 | 493,477 | 11,592 | 42.6 |
| 2031 | 508,357 | 11,592 | 43.9 |
| 2036 | 524,167 | 11,592 | 45.2 |

**Figure 9.14: Tenpin Requirement in Ipswich/Suffolk Coastal District**

| Year | Tenpin Lanes Supported | Study Area Custom Claimed by Ipswich | Potential No. of Lanes Supported in Ipswich | Study Area Custom Claimed by Suffolk Coastal District | Potential No. of Lanes Supported in Suffolk Coastal District |
|---|---|---|---|---|---|
| 2017 | 40.2 | 17% | 6.8 | 38% | 15.3 |
| 2021 | 41.2 | 17% | 7.0 | 38% | 15.7 |
| 2026 | 42.6 | 17% | 7.2 | 38% | 16.1 |
| 2031 | 43.9 | 17% | 7.5 | 38% | 16.7 |
| 2036 | 45.2 | 17% | 7.7 | 38% | 17.2 |

9.6.6 Figure 9.14 shows that across the two administrative areas the potential number of lanes that could be supported totals 40.2 increasing to 45.2 by the end of the plan period. Accordingly, existing bowling facilities in the two administrative areas, which provide a total of 44 lanes, are considered to meet with existing and projected requirements.

9.6.7 As we have previously noted in Section 8 the Namco FunScape bowling alley is the subject of an extant planning permission which provides for its change of use for retail purposes. Accordingly, should this planning consent be implemented the number of bowling lanes in the two administrative areas would reduce to 20.

9.6.8 The new state of the art Superbowl UK bowling alley will significantly enhance the qualitative provision of ten pin bowling in Ipswich. Both Namco Funscape and 'Tenpin' bowling facilities are somewhat dated and tired with neither offering modern or state of the art facilities.

9.6.9 Following the opening of the Superbowl bowling alley, and assuming the Namco Funscape bowling alley remains open, the Ipswich urban area will contain three tenpin bowling alley venues. In comparison to surrounding competing towns it is noted that Norwich has two and Bury St Edmunds and Colchester each have only one. It is also noted that none of the tenpin bowling alleys in competing centres are located in town centre locations. Overall, there is not considered to be any qualitative deficiency in the overall provision of tenpin bowling facilities in the two administrative areas.

9.6.10 As set out in Section 6, Hollywood Bowl has identified a requirement for the opening of a new bowling facility in Ipswich. Their agent has however confirmed to us that following Superbowl being secured at the Buttermarket Shopping Centre they no longer have a requirement in Ipswich. We understand that Hollywood Bowl did consider the Buttermarket Shopping Centre but the available space could not meet their bowling lane requirements.

## 9.7 Bingo

9.7.1 The Ipswich administrative area currently accommodates two permanent bingo halls, these being the Mecca Bingo at Lloyds Avenue in Ipswich Town Centre and Gala Bingo at Orwell Retail Park. Both are relatively large bingo hall facilities. The Gala Bingo Hall appears to be the most popular of the two as it attracts 29% of bingo trips which originate within the Study Area, which compares to the 13% market share claimed by Mecca Bingo. Figure 9.15 shows that the Gala Bingo hall draws residents from further afield than the Mecca Bingo hall, attracting residents as far north as Zone 13 (Framlingham).

9.7.2 In terms of bingo hall facilities in the Suffolk Coastal district, they are limited to The Palace in Felixstowe (which also functions as a cinema facility). In addition to attracting residents from Zone 10 (Felixstowe) it is interesting to note it also attracts residents from within the Ipswich ICA (Zones 1 and 3).

**Figure 9.15: Study Area Market Share for Bingo Visits (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ipswich Borough** | | | | | | | | | | | | | | | | | |
| Mecca Bingo, Lloyds Avenue | 12 | 31 | | 68 | 10 | | | | | | | | | | | | 13 |
| Gala Bingo, Orwell Retail Park | 74 | 69 | | 32 | | | 100 | | 100 | | | 100 | 100 | | | | 29 |
| Ipswich Total | 86 | 100 | | 100 | 10 | | 100 | | 100 | | | 100 | 100 | | | | 42 |
| **Suffolk Coastal District** | | | | | | | | | | | | | | | | | |
| The Palace, Crescent Road, Felixstowe | 14 | | 100 | | | | | | | 100 | | | | | | | 8 |
| Suffolk Costal Total | 14 | | 100 | | | | | | | 100 | | | | | | | 8 |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Beacon Bingo, Lowestoft | | | | | | | | | | | | | | | | 100 | 4 |
| Gala Bingo, Colchester | | | | | 90 | | | | | | | | | | | | 46 |

*Source: Questions 26 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.7.3 The Study Area has a total estimated population of 465,542 at 2017, increasing to 524,167 at 2031. Mintel identify that there were 354 bingo halls in the UK in 2016, which against the 2016 population of the UK of 65.1 million, suggests that each is supported by a catchment of 183,898 persons or thereabouts. Accordingly, we estimate that the Study Area population could support 2.5 bingo clubs at 2017, increasing to 2.9 bingo clubs by 2036.

9.7.4 Based on current market share, we would expect around 1.1 of these bingo halls to be located in the Ipswich administrative area at 2017, increasing to 1.2 halls at 2036. Accordingly, having regard to the existing two large bingo halls in the borough we do not consider there will be a requirement for an additional bingo facility in the borough in the plan period.

9.7.5 Whilst Suffolk Coastal district only has one bingo facility which in Felixstowe we do not consider it likely that there will be a requirement for an additional facility in the district in the plan period.

9.7.6 In terms of bingo hall requirements from bingo operators, there are currently no requirements. Indeed, new bingo hall openings are few and far between. We therefore do not consider it likely that there will be any change to current provision in bingo hall provision in the Study Area in the foreseeable future. Accordingly, we do not consider it necessary for either authority to plan for additional bingo hall provision in the period to 2036.

**Figure 9.16: Bingo Hall Requirement in Study Area**

| Year | Study Area Population | Typical Population Required to Support Hall | Potential No. of Clubs Supported by Study Area | Study Area Custom Claimed by Ipswich Borough | Potential No. of Clubs Supported in Ipswich Borough | Study Area Custom Claimed by Suffolk Coastal District | Potential No. of Clubs Supported in Suffolk Coastal District |
|---|---|---|---|---|---|---|---|
| 2017 | 465,542 | 183,898 | 2.5 | 42% | 1.1 | 8% | 0.2 |
| 2021 | 478,026 | 183,898 | 2.6 | 42% | 1.1 | 8% | 0.2 |
| 2026 | 493,477 | 183,898 | 2.7 | 42% | 1.1 | 8% | 0.2 |
| 2031 | 508,357 | 183,898 | 2.8 | 42% | 1.2 | 8% | 0.2 |
| 2036 | 524,167 | 183,898 | 2.9 | 42% | 1.2 | 8% | 0.2 |

9.7.7 Notwithstanding the above, as identified in Section 6, there is an outstanding requirement from Mecca Bingo to potentially open a new high street online bingo format store (Luda Bingo) of 232-465sq m gross in Ipswich Town Centre. The requirements are for a unit in the prime shopping area or a secondary area of the town centre with high passing footfall. At the time of writing no Luda Bingo outlet had been opened by Mecca Bingo but the appropriate planning and licensing permissions have been granted to allow them to open an outlet in Walsall. We understand from speaking with Luda's agents that the 'convenience format' will include a bingo room, a cafe area and an electric lounge (high paying jackpot machines area) and that opening hours are likely to be from 7am until midnight Monday to Saturday and between 9am and midnight on Sunday.

9.7.8 We recommend that, should any proposals for such development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

## 9.8 Arts and Cultural Activities

9.8.1 Arts and cultural activities play an important role in providing a distinct identify to places or towns, as well as being an important contributor to the local economy. Research by the Centre for Economic and Business Research (Cebr) in 2015 has quantified that every pound of public funding going to the Arts Council's National Portfolio Organisations pays back £5 in tax contributions from the sector as a whole. In overall terms, the arts and culture sector was estimated to have produced a turnover of £15.1 billion in 2013. Within this, museums alone have been estimated to contribute £1.45 billion of economic output nationally.

9.8.2 There are six arts organisations in Ipswich that are Arts Council England (ACE) National Portfolio Organisations (NPOs). These organisations are: New Wolsey Theatre, DanceEast, Pacitti Company, Gecko, Eastern Angles and Tilted Productions. The NPOs receive regular funding from ACE to deliver arts and cultural activities – currently for a period of three years. Ipswich has one of the highest concentrations, in the country, of organisations receiving regular funding from ACE.

9.8.3 For the purpose of this assessment consideration is given to the provision of theatres and museum/art facilities within Ipswich Borough and Suffolk Coastal District. Figure 9.17 details the main cultural venues in the two administrative areas.

**Figure 9.17: Main Cultural Venues in Ipswich Borough and Suffolk Coastal District**

| **Ipswich Borough** | |
|---|---|
| Museums | Ipswich Museum<br>Ipswich Transport Museum<br>Clifford Road Air Raid Shelter Museum<br>Christchurch Mansion & Wolsey Art Gallery<br>Ipswich Art Gallery |
| Theatre Venues | Ipswich Regent<br>The New Wolsey Theatre<br>The New Wolsey Studio<br>Dance East<br>Corn Exchange (Grand Hall)<br>Ipswich Film Theatre Trust<br>The Avenue Theatre |
| **Suffolk Coastal** | |
| Museums | Woodbridge Museum<br>Bentwater Cold War Museum – Woodbridge<br>The Tide Mill Living Museum - Woodbridge<br>Saxmundham Museum<br>Aldeburgh Museum<br>Felixstowe Museum<br>Long Shop Museum – Leiston<br>Martlesham Heath Control Tower Museum<br>Bawdsey Radar Museum<br>The Suffolk Punch Trust, Hollesley<br>Languard Fort, Felixstowe |
| Theatre Venues | Leiston Film Theatre<br>The Riverside Theatre – Woodbridge<br>The Seckford Theatre – Woodbridge<br>Snape Maltings<br>Aldeburgh Cinema |

9.8.4 In terms of trips to undertake art and cultural activities, as set out at in Figure 9.18, Ipswich is the most popular location attracting 33% of trips from the study area.

9.8.5 In the Ipswich ICA, Ipswich attracts the majority of trips (between 57% and 91%) with the Ipswich Regent and New Wolsey Theatre being the most visited venues. Beyond the Ipswich ICA, arts and cultural facilities in Ipswich attract more than 16% of residents from all study area zones, with the exception of Zones 5 and 13, where Ipswich attracts circa 6-7% and Zone 16 (the most northerly zone) where the household survey suggests it doesn't draw any residents.

**Figure 9.18: Study Area Market Share for Theatres, Galleries & Museum (%)**

| | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 | 11 | 12 | 13 | 14 | 15 | 16 | Total |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Ipswich Borough** | | | | | | | | | | | | | | | | | |
| Ipswich Regent | 15 | 29 | 11 | 30 | 2 | 7 | 8 | 2 | 13 | 11 | 7 | 9 | | 12 | 5 | | 9 |
| New Wolsey Theatre | 52 | 34 | 37 | 39 | 5 | 7 | 8 | 13 | 13 | 41 | 17 | | 6 | | 3 | | 19 |
| New Wolsey Studio | 4 | 4 | | 17 | | 3 | | | | | | | | 4 | | | 2 |
| Ipswich Museum | 5 | | 3 | 4 | | | | 2 | 2 | 2 | 2 | | | | | | 1 |
| Christchurch Mansion | | 6 | 2 | | | | | 2 | | | | 6 | | | | | 1 |
| Other | | | 3 | 2 | | | | | | | | 2 | | | 2 | | 1 |
| Ipswich Total | 75 | 73 | 57 | 91 | 7 | 16 | 16 | 17 | 29 | 55 | 27 | 16 | 6 | 16 | 10 | | 33 |
| **Suffolk Coastal District** | | | | | | | | | | | | | | | | | |
| Felixstowe | | 6 | | 4 | | | | | | 13 | 2 | | | | | | 1 |
| Woodbridge | | | 2 | | | | | 11 | 30 | | 24 | 7 | | 3 | | | 2 |
| Aldeburgh | | | | | | | | 2 | | | 2 | | 2 | 12 | 6 | | >1 |
| Framlingham | | | | | | | | | | | | | | | | 2 | >1 |
| Leiston | | | | | | | | | | | | | | | 15 | | >1 |
| Saxmundham | | | | | | | | | | | | | | 10 | | | >1 |
| Snape | | | | | | | | | | | | | 2 | 4 | 4 | | >1 |
| Other | | | | 2 | | | | 2 | | | | 6 | | 4 | | | >1 |
| Suffolk Costal Total | | 6 | 2 | 6 | | | | 15 | 30 | 13 | 27 | 13 | 4 | 32 | 25 | 2 | 5 |
| **Outside Ipswich/Suffolk Coastal Areas** | | | | | | | | | | | | | | | | | |
| Central London | 18 | 8 | 18 | 3 | 45 | 24 | 28 | 46 | 36 | 27 | 25 | 43 | 68 | 36 | 26 | 22 | 29 |
| Colchester | | | 2 | | 28 | | | | | | | | | | 5 | 2 | 8 |
| Norwich | | 6 | 4 | | 3 | 20 | 29 | | | 2 | 7 | 5 | 5 | 6 | 33 | 39 | 8 |
| Bury St Edmunds | 4 | 4 | | | | 28 | 18 | 3 | | | 2 | 2 | | | | | 5 |
| Sudbury | | | | | 9 | | | | | | | | | | | | 2 |

*Source: Questions 27 of the NEMS Household Survey, Appendix A. Includes all responses located within Study Area and those receiving more than 1% of total market share of trips outside Study Area*
*Notes: Figures may not add due to rounding*

9.8.6 Primarily due to: the type; the limited size; the scale of arts and cultural facilities in the Suffolk Costal district; the districts location to existing arts and cultural facilities in Ipswich; and the fact that a large proportion of the facilities are primarily targeted for visitors/tourists (which reside outside the study area) such facilities only attract a study area market share of 5%.

9.8.7 Outside the Study Area, by far the most popular destination for art and cultural trips originating in the Study Area is Central London, which achieves a market share of 29%. This is not surprising given the greater choice of facilities/venues in the City and it being a major visitor/tourist destination. In terms of other destinations outside the Study Area, Colchester and Norwich both achieve a market share of 8% each whilst Bury St Edmunds achieves a market share of 5%.

9.8.8 As previously noted in Section 6, as a major centre it is considered that Ipswich sustains a good number of cultural facilities. The household survey identifies that facilities in Ipswich draw from a large area and the town is the most popular destination in the study area. Furthermore:

- stakeholders consider that the town contains a strong arts and cultural offering provided through, *inter alia*, theatres and museums;
- additional/improved arts and cultural facilities have not been identified by stakeholders as a suggested measure to improve the town centre;
- additional/improved cultural facilities have not been identified by household survey respondents as a measure that would encourage them to visit Ipswich Town Centre more frequently; and
- just 1% of household survey respondents in the study area (and Ipswich ICA) would like to see more cultural facilities.

9.8.9 Accordingly, we do not consider that there a current requirement for new cultural facilities in Ipswich. However, in order to maintain and improve current participation rates, and help increase the number of visitors to the venues/area, consideration should be given to ways of further promoting existing facilities and improving marketing.

9.8.10 In terms of existing cultural facilities in the Suffolk Coastal district, we consider existing provision in the district towns is of a scale which is appropriate to their role in the hierarchy. Demand/need for additional provision is likely to be limited due to the location of existing more comprehensive cultural facilities in the sub-regional centre of Ipswich.

9.8.11 We again recommend that, should any proposals for arts and cultural development be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy at the time of an application's submission.

# 10.0 Hotel Needs Assessment

## 10.1 Introduction

10.1.1 This part of the study provides information on the hotel market in the two Council areas. Current trends relating to the hotel sector have already been identified in Section 3 of the study. The work undertaken includes:

- A review of existing economic and tourist strategies for the two Council areas;
- a review of the current hotel supply in Ipswich and Suffolk Coastal area and supply immediately influencing the survey area;
- a review of current or extant proposals for hotels in the areas;
- a survey of hotel managers in the area to assess current occupancy levels, future plans and outlook; and
- the consideration of demand for further hotel accommodation.

10.1.2 As part of the background research to inform this element of the study a Hotel Managers Survey was conducted by questionnaire. This was distributed by post and email to 45 hotels in Ipswich Borough and Suffolk Coastal District in January 2017. The questionnaire also went to 15 hotels immediately adjoining the Ipswich urban area or adjacent to Suffolk Coastal District. A copy of the questionnaire is provided at **Appendix B**. The purpose of the questionnaire was to gather information about the existing supply of hotels in the area, in particular to assess their nature, size and understand what facilities they offer.

10.1.3 In addition to the Managers Survey, to ascertain the commercial interest and aspirations from hotel developers and investor confidence in the survey area, telephone interviews were held with a number of hotel operators and developers. These were targeted at those who are known to be active in the market and those who are underrepresented in the two Council areas. Some operators also publish lists of 'target locations' and these were also followed up. The results of these interviews have informed our consideration of the likelihood of provision of further hotel bedrooms in the two council areas.

## 10.2 Economic and Tourist Bodies/Stakeholders Influencing the Hotel Market in the Two Council Areas

10.2.1 There is a clear growth agenda for the two Council areas, particularly for Ipswich. This is evidenced by the planned growth identified in the emerging local plans and also in the economic development strategies for the areas. Both Local Authorities recognise the economic value of tourism and seek to encourage appropriate tourist related development to contribute to and enhance the economic success of the areas. The agenda for growth will have the potential to influence the hotel market. In particular, the

Ipswich Economic Development Strategy 2013-2026 identifies potential growth sectors for the Borough which includes 'Tourism and Hospitality'. The strategy identifies Ipswich as '*an attractive destination in its own right'* as well as being *'an anchor location for visitors interested in the broader East Anglian tourism offer'.* The desire is to attract a greater number of tourists to the town from further afield and to get them to stay overnight, rather than just visit for the day.

10.2.2 Key factors that will influence the supply of hotel accommodation in the two Council areas includes:

- Economic growth and provision of further employment floorspace, this will drive increased business demand for hotel bed spaces.
- Increase in levels of tourism through better marketing resulting in potential for increased demand for tourist bed spaces
- Creation of new or improved leisure destinations/events is likely to create demand for overnight stays
- Other economic drivers, such as the University, major employment or bespoke investments (such as Sizewell C), will drive short term and long term requirements for hotel accommodation
- Construction generally generating short term demand for accommodation
- Activity in competing areas elsewhere in Suffolk or East Anglia

### Ipswich Central BID

10.2.3 Ipswich Central BID was founded in 2007. There has been clear support for the BID from local businesses demonstrating the value that local business places on the work they undertake. The BID has a 'Vision' for Ipswich and seeks to distinguish Ipswich as a distinctive place to visit. The BID aspire for Ipswich to become known as East Anglia's Waterfront Town. Values focus around Place Shaping, Place Management and Place Marketing. Ipswich Central commissioned Aecom in 2015 to look at opportunities for enhancing the potential of the Ipswich area for increased visitors. This research indicated the ability to attract an additional 680,000 day visitors a year and up to 26,000 overnight stays (representing a 10% uplift). A key aim was to turn existing 'day visitors' into 'overnight visitors' and to widen the appeal of the town to visitors from further afield. There was no specific suggestion in the Aecom report that there was a need to increase the number of hotels in the town at that stage, although the lack of budget/hostel accommodation was referenced. However, it is noteworthy that there have been significant changes to hotel bedroom supply since the Aecom report was published. These are detailed later in this section of the study.

10.2.4 Following the Aecom work 'Turning our town around' was published later in 2015. This vision for Ipswich was prepared in association with a number of bodies including UCS, New Anglia LEP, Suffolk County Council, Ipswich Central, Ipswich Borough Council, Ben Gummer MP and the Ipswich Chamber of Commerce. The Ipswich Vision is a partnership of these key stakeholders with the express purpose to ensure the success of the town centre through supporting regeneration of key sites, pursuing better transport opportunities, enhancing the retail environment and seeking improvements to the physical environment of the town (spaces and buildings).

### New Anglia Local Enterprise Partnership

10.2.5 As noted earlier in the study the New Anglia Local Enterprise Partnership (LEP) key role is to drive economic growth and transform the local economy into a global centre for talent and innovation. The LEP's ambitious strategic plan includes seeking to create 95,000 new jobs by 2026. Central Government recently announced in February 2017 a further £69m injection of funding into the LEP, this brings the total injection since 2014 to some £290m.

10.2.6 The LEP, working with Local Authorities, has also negotiated a City Deal for Ipswich which allows greater concentration on job creation and supporting skills and training. Linked to this the LEP has secured Enterprise Zones (EZ) including the Greater Ipswich EZ, this EZ specifically seeks to support delivery of the Ipswich Vision. The LEP has identified a number of key sectors to focus on, one of which is Tourism. This sector is identified as one where concentration on provision of year round opportunities would deliver growth and stability. The LEP is actively working with Visit East Anglia and Visit Suffolk.

### Ipswich DMO

10.2.7 The Ipswich DMO was formed in 2015 to promote Ipswich as a tourist destination. The DMO has adopted the 'All About Ipswich' brand in part to raise the profile of the area and in particular to seek to attract visitors throughout the calendar year.

10.2.8 The DMO 'All About Ipswich' website provides useful information on attractions in the area, things to do and places to stay. It also provides a neat link into Suffolk Coastal area through advertising Ipswich as the Gateway to Suffolk. The site also provides direct links to the 'Visit Suffolk' website where visits to the wider Suffolk area including Babergh and the historic town of Bury St Edmunds.

### Suffolk Coast DMO

10.2.9 The Suffolk Coast DMO was formed in 2012 with the purpose of promoting the area as a visitor destination. The Website, much like the Ipswich DMO, promotes the area as a place to visit. In seeking to positively drive tourism in the area, Suffolk Coast DMO with Suffolk Coast & Heaths AONB commissioned URS to prepare a Tourism Strategy for the period 2013-2023. This identifies key objectives and a strategy for the AONB area, encompassing a large part of Suffolk Coastal District. A key opportunity identified was to support existing accommodation operators to improve their offer and encourage additional accommodation in appropriate locations. A further objective was to increase the development of 'spa experiences' which at that time were identified to be under represented.

10.2.10 In looking specifically at hotel accommodation, the URS study did not propose that new accommodation be developed in Suffolk Coast in the short to medium term due to existing capacity and the danger of exacerbating 'overcrowding' in key destinations. However, gaps in the market were identified in Felixstowe and Orford. It is noted that since the publication of the URS report further hotel development has occurred in Felixstowe. No additional rooms have been developed in Orford to date.

## 10.3 Current Hotel Supply

10.3.1 A review of existing hotels in the Council areas was undertaken in January/February 2017. This review included hotels, inns and serviced apartments but has not captured accommodation provided in guest houses, B&B's or self-catering holiday accommodation. The review identified accommodation through reviewing the following sources:

- Visit Suffolk website;
- Visit Suffolk Coast website;
- All About Ipswich website;
- Ipswich Borough Council Records; and
- Suffolk Coastal District Council Records.

10.3.2 The resultant list was then cross referenced with the results from internet travel search engines including:

- Expedia.co.uk;
- Trivago.co.uk;
- Hotels.com; and
- Tripadvisor.co.uk.

10.3.3 Hotel provision is broadly summarised in terms of locations across the two Council areas in Figure 10.1 below. A plan showing the provision is provided at **Appendix R**:

**Figure 10.1: Hotel locations**

| Location | No. of Hotels | No. of Rooms |
|---|---|---|
| Ipswich | 15 (8) | 1,333 |
| Felixstowe | 6 | 205 |
| Woodbridge and Environs | 7 | 190 |
| Aldeburgh | 4 | 124 |
| Leiston | 2 | 17 |
| Framlingham | 1 | 14 |
| Saxmundham | 1 | 10 |
| Suffolk Coastal – rural areas | 9 | 168 |
| Southwold and Environs | (7) | 92 |
| **TOTAL** | **45 (15)** | **2,153** |

*Note: The above list includes hotels in Ipswich Borough and Suffolk Coastal District. Hotels in Mid Suffolk, Waveney and Babergh Districts have also been included, in brackets, where they are close to or relate to Ipswich and Suffolk Coastal.*

10.3.4 Our research identified 45 hotels across the two Council areas, in addition a further 15 hotels were immediately adjoining the survey area in Babergh, Waveney or Mid Suffolk. The number of hotels across the two Council areas is biased towards Suffolk Coastal, with 15 identified within Ipswich Borough and 30 within Suffolk Coastal District. The administrative boundary of Ipswich Borough is such that some of the urban area of the town to the south and west around the A12/A14 interchange and along the A12 and A14 corridors falls outside the borough boundary. In addition, the generally rural nature of Suffolk Coast is influenced by the town of Southwold, in Waveney District immediately adjoining the north of the District. A full list of the hotels identified is contained at **Appendix S**.

10.3.5 The accommodation is geographically spread across the two council areas. As illustrated in Figure 10.1 above, Ipswich, Felixstowe and Woodbridge are focuses for provision, reflecting their positions as the larger settlements in the two council areas. The nature of hotels across the two Council areas is diverse, with a good mix of budget, 3*, 4* country house and boutique hotels and inns, this is illustrated in Figure 10.2 below.

**Figure 10.2: Hotel Supply by Standard**

| Standard | No. of Hotels | No. of Rooms |
|---|---|---|
| Budget/2* | 19 | 771 |
| 3* | 22 | 855 |
| 4* (includes golf and spa resorts) | 14 | 524 |
| 5* | 1 | 3 |
| **TOTAL** | **60** | **2,153** |

### Hotel Supply in the Ipswich Urban Area

10.3.6 Ipswich, in addition to being an economic hub for the County, is marketed in tourist terms as being 'The Gateway to Suffolk'. In this regard it functions as a hub providing accommodation serving the wider rural areas of Suffolk County, including Suffolk Coastal. Hotel accommodation in and around Ipswich is predominantly towards the budget end of the market, with a more limited supply of higher standard establishments.

**Figure 10.3: Hotel Supply by Standard - Ipswich Urban Area**

| Standard | No. of Hotels | No. of Rooms |
|---|---|---|
| Budget/2* | 11 | 600 |
| 3* | 9 | 436 |
| 4* (includes golf and spa resorts) | 3 | 297 |
| 5* | 0 | 0 |
| **TOTAL** | **23** | **1,333** |

10.3.7 The budget market in and around Ipswich is dominated by national operators such as Premier Inn and Travelodge with both strongly represented (5 and 3 hotels respectively). Ipswich is highly accessible by car benefiting from both the A12 and A14 Trunk Roads passing through or close to the area, these transport corridors are a focus for hotel accommodation (notably budget provision).

10.3.8 Centrally within the town there is a reasonable choice of hotel accommodation with the aforementioned budget offer supplemented by 4* provision both from independents and national operators such as The Salthouse, Novotel and Pentahotel. The remainder of the provision in the town is made up of both independent hotels and some national operators including Best Western and Holiday Inn. These hotels are spread throughout the urban area of Ipswich. There is noted to be no hostel representation in Ipswich.

10.3.9 In addition to the standard of hotels available there is a reasonable mix of hotels in terms of size. The Pentahotel with 126 rooms is the largest identified in the Ipswich area, with another three hotels, Holiday Inn Ipswich, Travelodge Beacon Hill and the Novotel offering in excess of 100 rooms. The majority of hotels in the Ipswich area have between 30 and 90 rooms (12 of the 23 identified). The smallest hotels identified are the independently run Station Hotel and Bentley Tower Hotel, with 12 and 10 rooms respectively. A summary of the size of hotels in the area is provided in the Figure 10.4 below.

**Figure 10.4: Hotel Sizes - Ipswich Urban Area**

| Hotel Size | No. of Hotels |
|---|---|
| Up-to 20 rooms | 5 |
| 21-40 rooms | 6 |
| 41-60 rooms | 1 |
| 61-80 rooms | 3 |
| 81-100 rooms | 4 |
| 101 or more rooms | 4 |
| **TOTAL** | **23** |

10.3.10 Within Ipswich, the Novotel in the town centre and the Holiday Inn Ipswich on the western periphery of the town both market themselves as being conference hotels. Both are able to accommodate in excess of 150 delegates for the day and overnight. The Ipswich Hotel at Copdock, to the south of Ipswich, also markets itself as a conference venue catering for up to 500 delegates. This hotel has recently been the subject of extensive refurbishment and was reported in March 2017 to have joined the Best Western brand. Many of the other hotels in the Ipswich Urban area offer more limited conference and or meeting facilities. The budget hotels generally do not offer such services.

10.3.11 Wedding venues vary significantly and hotels operate in this highly competitive market with wedding specific venues, country house destinations as well as leisure resorts. The results of our Hotel Managers survey identifies that a number of the hotels in Ipswich market themselves as being able to accommodate weddings, this includes the Belstead Brook Muthu, Penta Hotel, Holiday Inn Orwell and Novotel.

10.3.12 The only hotels in the Ipswich area that have been identified as having spa facilities are the Belstead Brook Muthu Hotel and the Holiday Inn.

10.3.13 In terms of cost of hotels in the Ipswich area, the results of the Hotel Managers survey indicate the average cost of a double room is predominantly in the £51-£80 per night bracket. Travelodge and some independent provision identified their average room costs fell within the £31-£50 bracket. Only three hotels in the Ipswich area identified their average room cost was in excess of £80 per night, with one of these identifying it was in excess of £101 per night.

### Hotel Supply in Suffolk Coastal District

10.3.14 The Suffolk Coastal district area is predominantly a rural district with the larger settlements being Felixstowe and Woodbridge. Felixstowe has 6 hotels, reflecting the scale of the port near the town, its businesses and tourist function. Representation in the town is limited to 3* provision and budget hotels. National operators present include Premier Inn and Best Western.

**Figure 10.5: Hotel Supply in Suffolk Coastal District**

| Standard | No. of Hotels | No. of Rooms |
|---|---|---|
| Budget/2* | 8 | 171 |
| 3* | 16 | 419 |
| 4* (includes golf and spa resorts) | 12 | 227 |
| 5* | 1 | 3 |
| **TOTAL** | **37** | **820** |

10.3.15 Woodbridge and the immediately surrounding rural area has 7 hotels, all of which are independently operated. Provision is made up of 3* and 4* hotels and includes luxury destinations such as Woodhall Manor and Ufford Park (Best Western) which is a golf and spa hotel. Hotels in the area include those forming part of the T A Hotel Collection, one of East Anglia's leading independent hotel and leisure businesses. The hotels in the Woodbridge area are a focus for tourists wishing to explore the Suffolk Coastal area.

10.3.16 The remainder of Suffolk Coastal area provision includes 17 hotels spread through the smaller towns, villages and in rural locations. This provision is entirely independent and includes a mix of small budget, and 3* hotels as well as 4* boutique, country house, golf and spa hotels.

10.3.17 Hotels in the Suffolk Coastal area are generally smaller than those in the Ipswich area. The largest hotel in the area is the Ufford Park Hotel with 90 rooms, the Orwell Hotel and Premier Inn in Felixstowe both have 60 rooms, but all other hotels have 50 rooms or less, with twenty two having 20 rooms or less.

**Figure 10.6: Hotel Sizes – Suffolk Coastal District**

| Hotel Size | No. of Hotels |
|---|---|
| Up-to 20 rooms | 22 |
| 21-40 rooms | 8 |
| 41-60 rooms | 6 |
| 61-80 rooms | 0 |
| 81-100 rooms | 1 |
| 101 or more rooms | 0 |
| **TOTAL** | **37** |

10.3.18 Within Suffolk Coastal area, a number of hotels offer conference facilities for in excess of 100 delegates, these include, Kesgrave Hall and Ufford Park Hotel, which are located in the Woodbridge/Martlesham area and The Orwell Hotel in Felixstowe.

10.3.19 A number of other hotels in the area also offer more limited conference/meeting facilities. It is noted that there are a number of hotels that, whilst being able to accommodate a large number of delegates for a conference, do not have the level of accommodation necessary to accommodate guests overnight. Kesgrave Hall is a good example of this being restricted to only 23 rooms, whilst being able to accommodate in excess of 200 delegates during the day.

10.3.20 The Hotel Managers Survey identified a larger number of hotels in Suffolk Coastal identifying they could accommodate weddings, although on the whole they could accommodate less guests overnight than in the day. The scope of 'wedding service' offered also varied from hotel to hotel, with a number of the smaller hotels accommodating the wedding reception only, with larger venues offering the ability to host the wedding itself and provide overnight accommodation to guests also. Ufford Park in the Woodbridge area of Suffolk Coastal District is an example of a hotel that provides a full wedding service (venue, reception and overnight accommodation).

10.3.21 Some hotels hosting wedding venues that do not have sufficient onsite accommodation actively work with local hotels to provide accommodation to supplement their wedding offer. A good example of this is the Thorpeness Country Club who work with hotels in Aldeburgh (White Lion and Brundenell) and the Thorpeness Golf Club and Hotel.

10.3.22 Leisure hotels/resorts include golf hotels and spa resorts. The previously identified Ufford Park Hotel and the Thorpeness Hotel and Golf Club are the only two 'golf hotels' identified in the two council areas, both being located in Suffolk Coastal area. Ufford Park brands itself, in part, as a golf hotel, offering golf breaks throughout the year and specifically targeting the winter months based on the relatively dry and mild climate in the area. This is supplemented by a golfing retail outlet golf academy and an adventure golf course 'Congo Rapids'. Similarly, the Thorpeness Golf Club and Hotel offers golfing breaks and in particular corporate golf entertainment packages. The only two spa hotels identified, these being Ufford Park Hotel and Seckford Hall are both located close to Woodbridge.

10.3.23 In terms of the cost of hotels in the Suffolk Coastal area, the Hotel Managers survey identifies the average cost of a double room is in all cases in the £81-£100 or £101+ per night bracket categories. Four hotels in the Suffolk Coastal area identified their average room cost was in excess of £101 a night. Whilst it is recognised there are lower cost hotels in the area who did not respond to the questionnaire, the results of our survey do reflect the generally higher cost of accommodation in Suffolk Coastal area when compared to the Ipswich urban area.

### Hotel Supply outside the Two Council Areas

10.3.24 As previously noted there are a number of hotels and destinations outside but close to the two Council areas, which function to serve both Ipswich Borough and Suffolk Coastal District. Where these hotels are located close to the Council areas they have been identified and surveyed as part of this study (see Figure 10.1).

10.3.25 In terms of the wider supply of hotel accommodation surrounding the area, other nearby towns/cities which provide clusters of hotel accommodation includes:

- Norwich (28 miles north of Suffolk Coastal) – providing approximately 50 hotels;
- Colchester (18 miles south of Ipswich) – providing in excess 20 hotels;

- Bury St Edmunds (30 miles north west of Ipswich) – providing 11 hotels;
- Lowestoft (14 miles north of Suffolk Coastal) – providing 9 hotels; and
- Stowmarket (15 miles north of Ipswich) – providing 2 hotels.

10.3.26 Hotels in these surrounding towns primarily serve their own business and tourist markets. However, they do offer some opportunity to serve Ipswich and Suffolk Coastal areas also, particularly in times of peak demand. As a comparison the urban area of Ipswich provides some 23 hotels, Woodbridge 7 and Felixstowe 6. Ipswich as regional centre is noted to provide a similar number of hotels to Colchester, which is also classified as a regional centre. Hotel provision in Ipswich is notably greater than the other nearby regional centre of Bury St Edmunds. Felixstowe (major district centre) and Woodbridge (minor district centre) in terms of hotel numbers provide significantly more than the Stowmarket, classified as a district centre. Norwich classified as the major city in the region provides more than double the number of hotels in Ipswich.

**Serviced Accommodation**

10.3.27 In addition to traditional hotel accommodation, our survey work has sought to identify serviced apartments in the area. Serviced apartments are a popular alternative form of accommodation to hotels, particularly for business stays. Our review of accommodation has revealed a limited supply of approximately 20 serviced apartments all of which are located in Ipswich. The representation includes:

- Seven Property Group – includes 9 apartments in Ipswich. The apartments are focused in the town centre but include 2 apartments close to the waterfront.
- Chequers Executive Apartments – includes 5 apartments in the waterfront area of the town.
- Toothbrush Apartments – includes 5 apartments spread across the town.
- Empire Serviced Apartments – single apartment in the waterfront area of the town.

10.3.28 The serviced apartment accommodation identified in Ipswich appears to be operated by smaller sale local/regional businesses. There is currently no representation of the larger national operators such as SACO or Premier Apartments which suggests that the level of corporate trade, upon which they rely primarily, may not be present in the town.

**Airbnb**

10.3.29 As identified earlier in this study the rise of Airbnb over recent years has been significant and will continue to influence the hotel market. A review of Airbnb listed accommodation in February 2017 as part of this study identified a significant amount of accommodation being advertised in the two Council areas. More than 300 rooms were identified in Ipswich, nearly 70 in Woodbridge and 50 in Felixstowe. Whilst it is appreciated that some of this offer may overlap with traditional B&B and is therefore merely a further marketing forum for existing accommodation, Airbnb in providing a simple and accessible forum to market and book accommodation, has introduced new accommodation to the market. This will in some instances compete with traditional hotel accommodation.

## 10.4 Recent Hotel Development

10.4.1 As part of this study we have sought to identify recent changes in the supply of hotel rooms. This assists in better understanding the nature of provision and changes over time.

10.4.2 Five new hotels have opened and one has been subject to extensive refurbishment in the last five years within the two Council areas based on responses from the Hotel Managers Questionnaire and review of Council records. The six identified are:

<u>Ipswich Borough</u>

- The Mermaid, Ipswich (2016) – 28 rooms
- Penta Hotel, Ipswich (2016) – 126 rooms (refurbishment)
- Premier Inn, Ipswich (2013) – 85 rooms
- Travelodge, Duke Street, Ipswich (2012) – 87 rooms

<u>Suffolk Coastal District</u>

- Premier Inn, Felixstowe (2016) – 60 rooms (replacing former Ordnance Hotel)
- The Bell at Sax, Saxmundham (2013) – 10 rooms

### Ipswich Borough

10.4.3 The new hotels identified above have significantly increased the supply in the area over the last 5 years. In addition to this, the Premier Inn Ipswich South East has recently completed a 16 bedroom extension in the town. We are not aware of any other recently completed extensions/expansions of hotels in the Ipswich area.

10.4.4 Setting aside the 4* Penta Hotel which was substantially refurbished, all other recent openings and extensions in Ipswich have been at the budget end of the market by national operators and have provided 216 additional hotel rooms. The 216 recently constructed rooms in Ipswich represent approximately 16% of the hotel rooms currently in the town. This is a significant uplift in room numbers in a relatively short time frame, especially when it is focussed in one standard (budget) of the hotel market.

10.4.5 The Penta Hotel was formerly the Ramada Encore and was subject to extensive refurbishment in 2016 and is now branded as a 'Neighbourhood Lifestyle Concept' hotel and includes a lounge bar area with free gaming consoles. It also includes 'PentaPlayerPads' a new concept in eGaming rooms. The recent opening of the Penta Hotel Ipswich represents a spate of new openings and refurbishments by the parent company, who have also opened 5 other hotels across the country in recent years. The investment by Penta in Ipswich was in part attributed to 'relatively little hotel capacity in the mid-market sector'. [30]

10.4.6 Whilst not resulting in an uplift in the supply of rooms, the change of ownership and rebranding of the former Cameo Hotel, Copdock is noted. This hotel just to the south of Ipswich was sold to Cameron Ventures Group in 2016 and was rebranded as The Ipswich Hotel. Subsequently it has been confirmed that this hotel has joined the Best Western brand.

10.4.7 The Great White Horse Hotel in central Ipswich has not been occupied as a hotel since 2008. It is occupied by a coffee shop and retailer on the ground floor and is subject to a current planning application to convert the remaining vacant part of the former hotel to a business centre, 3 residential flats and the extension to the existing Starbucks unit. We are aware that hotel operators have looked at the building in recent years, including EasyHotel, but all appear to have determined continued hotel use of the building was not viable.

**Suffolk Coastal District**

10.4.8 Recent hotel openings in Suffolk Coastal District have provided an additional 70 bedrooms. Whilst a lesser number than in Ipswich, this still equates to approximately 10% of the current hotel rooms available in the District.

10.4.9 The Bell at Sax opened in 2013 and, whilst providing 10 rooms, markets itself as a 'restaurant with rooms' rather than a hotel. The emphasis of the establishment is on high quality food supplemented by the 4* accommodation available.

10.4.10 In Felixstowe, in addition to the new Premier Inn, it is noted that the Orwell hotel has recently changed ownership having been sold to Bloomsbury Realty Management who specialise in operating hotels and wedding venues.

10.4.11 The only recent closure we are aware of is the Three Tuns in Pettistree. This resulted in the loss of 11 rooms. It is noted that the former Ordnance Hotel in Felixstowe made way for the Premier Inn, however, it had not benefitted from letting rooms for a number of years prior to its demolition.

10.4.12 The former North Sea Hotel in Felixstowe, which closed a number of years ago, has now been sold for redevelopment to provide residential accommodation.

[30] Alastair Thomann, Global MD of Penta Hotels (Ipswich Star article 16 September 2016)

### Summary

10.4.13 In summary, whilst there have been a limited number of hotel closures in recent years, the substantial level of new provision has resulted in a significant net gain in room numbers across the two Council areas.

## 10.5 Pipeline Hotels

10.5.1 In addition to recent changes in hotel supply, it is important to look at the potential for further change.

### Ipswich Borough

10.5.2 Our research has identified a number of relatively recent planning permissions in the Ipswich area which include proposed hotels.

**Figure 10.7: Hotel planning permissions in Ipswich Borough (expired)**

| Planning Reference | Description of Development | Date of Decision | Comments |
|---|---|---|---|
| 11/00708/FUL | Erection of 3 hotels, 411m² retail, 1278m² retail/restaurant, 8342m² offices, basement and sub basements, car parking (420 spaces) together with conversion, renovation and change of use of Nos 1-5 College Street to bar/restaurant and all ancillary works (renewal of Planning Permission IP/07/00555/FUL, dated 2nd December 2008). | Approved 21.11.11 | PP expired 21 Nov 2016 |
| 12/00771/FUL | Erection of 5 storey 106 bedroom hotel with associated parking and landscaping. | Approved 21.12.12 | PP expired 21.12.15 |
| 13/00154/VC | Planning permission to replace extant planning permission IP/09/00782/FUL for mixed use redevelopment of site including sheltered housing and a hotel. | Approved 17.09.13 | PP expired 17.09.16 |

10.5.3 The three planning permissions identified in Figure 10.7 had the ability to deliver a significant number of further hotel rooms in Ipswich but have all now lapsed/expired. We understand that these planning permissions were not implemented for a variety of reasons including, archaeology and viability matters. It is also noted that the timing of these planning permissions overlapped with the delivery of a large number of hotel rooms on other sites in Ipswich. As such this is likely to have influenced investor confidence and or viability of delivery.

10.5.4 In terms of extant planning permissions, the only one we have identified in Ipswich is EasyHotel. EasyHotel have recently been granted planning permission and listed building consent by Ipswich Borough Council to provide a 94-bedroom hotel at 3-5 Northgate Street in Ipswich Town Centre. We understand that EasyHotel have acquired the freehold of the site and that the hotel is expected to open later in 2017. The EasyHotel hotel will be a 'super budget' hotel and is one of a number the company are looking to open in the UK this year, the others being Birmingham, Liverpool and Manchester.

10.5.5 A planning application has recently been approved for the delivery of a new 100 bed Travelodge hotel on a brownfield site at Pooleys Yard in Ipswich (ref: 17/00445/FUL).

10.5.6 A further planning application has been made by Plutus (Ipswich) Ltd in July for a residential led mixed-use scheme on Grafton Way. This application includes a 60 bed hotel. This element of the scheme appears to be speculative with no named operator at this juncture.

### Suffolk Coastal District

10.5.7 We are not aware of any recent planning applications for hotel development in Suffolk Coastal District other than those already implemented and identified above.

## 10.6 Origins of Hotel Guests/Demand for Rooms

### Domestic Origins

10.6.1 The Great Britain Tourism Survey is published by VisitBritain and identifies the number of domestic overnight trips taken by residents in Great Britain, a summary of the most recent figures for the local authority areas in Suffolk is provided below. These figures take an average of three years to avoid fluctuations, in this instance the most recent available are 2013-2015.

**Figure 10.8: Overnight Visitors - Suffolk**

| Location | Overnight Trips (million) | | Total Nights (million) | | Average No. of Nights (million) | |
|---|---|---|---|---|---|---|
| | 2011-2013 | 2013-2015 | 2011-2013 | 2013-2015 | 2011-2013 | 2013-2015 |
| Ipswich | 0.26 | 0.28 | 0.75 | 0.69 | 2.9 | 2.5 |
| Waveney | 0.37 | 0.35 | 1.37 | 1.38 | 3.7 | 3.9 |
| Suffolk Coastal | 0.29 | 0.24 | 1.14 | 0.82 | 3.9 | 3.4 |
| St Edmunds | 0.2 | 0.13 | 0.55 | 0.42 | 2.8 | 3.2 |
| Babergh | 0.15 | 0.12 | 0.34 | 0.37 | 2.3 | 3.1 |
| Forest Heath | 0.13 | 0.17 | 0.37 | 0.49 | 2.8 | 2.9 |
| Mid Suffolk | 0.10 | 0.10 | 0.39 | 0.36 | 4.1 | 3.6 |
| **SUFFOLK** | **1.5** | **1.39** | **4.92** | **4.53** | **3.3** | **3.3** |

*Source: Great Britain Tourism Survey 2011 -2015*
*Notes: Figures may not add due to rounding.*

10.6.2 Figure 10.8 above indicates that in respect of domestic overnight visitors for the period 2011-2015 there has been a dip in both the number of trips and nights stayed in the County generally. Overnight trips have fallen from an average of 1.5m a year in the period 2011-2013 to 1.39m a year in the period 2013-2015, this is a circa 7.5% decline. The same 7.5% fall in the total nights stayed is also recorded, falling from an average of 4.92m over the 2011-2013 period to 4.53m over the 2013-2015 period. The average number of nights stayed has remained constant at 3.3 nights.

10.6.3 The number of domestic overnight trips in Ipswich has actually increased over the period from an average of 0.26m to 0.28m a year, bucking the trend of the County as a whole. This increase in numbers correlates to some degree to the additional hotel rooms provided over the period in this area, increasing supply generally. The total number of nights stayed and average length of stay has followed the County trend in reducing over the period. It is noted that the average number of nights stayed in Ipswich is below the average of the County. This is possibly owing to the bias towards business trips to the town rather than more leisure based trips elsewhere in the County.

10.6.4 Looking at Suffolk Coastal District, this has followed the trend of the County as a whole in reduced number of domestic overnight trips, total nights and a reduction in the average number of nights stayed. The average number of nights stayed in Suffolk Coastal however still remains above the average for the County as a whole. This is likely to reflect the larger tourist market in the district.

## Overseas Visitors

10.6.5 The Office of National Statistics (ONS) provides details of the number of overseas visitors to the UK. The 2015 figures are the latest figures available at the time of writing. They identify that there were 219,000 overnight trips to Suffolk in 2015, this is up from 210,000 in 2014 but down from the 231,000 recorded in 2013.

10.6.6 VisitBritain also records overseas visitor numbers for counties and larger towns, figures for recent years are shown in the Figure 10.9 on the following page:

**Figure 10.9: Overseas Overnight Trips**

| Location | Overnight Trips (000's) | | | | | |
|---|---|---|---|---|---|---|
| | 2010 | 2011 | 2012 | 2013 | 2014 | 2015 |
| Ipswich | 52 | 53 | 76 | 79 | 65 | 68 |
| Felixstowe | 8 | 5 | 7 | 17 | 14 | 13 |
| Suffolk | 225 | 186 | 221 | 228 | 210 | 219 |

*Source: VisitBritain, 2016 statistics*
*Notes: Figures are not available for other settlements within the two Council areas*

10.6.7 The VisitBritain figures shows a significant increase in overseas visitors to Ipswich in 2012 from those in 2011, which was well reported in the local press at the time. There was then a marginal increase in 2013 peaking at 79,000, but since then the numbers of overseas visitors has declined with 68,000 reported in 2015.

10.6.8 A similar pattern can be identified for Felixstowe, which is the only other town for which figures are available. A peak of 17,000 overseas visitors were recorded in 2013 a significant step change from the 7,000 recorded in 2012. Since 2013, figures have begun to decline but still remain well above the levels recorded in 2010.

10.6.9 The dip in overseas visitors since the 2012/13 highs in Ipswich and Felixstowe are reflected in the figures for the County as a whole with a peak of 228,000 visitors in 2013 which then dipped to 210,000 in 2014. Figures for 2015 showed a positive move, up to 219,000.

10.6.10 Destination Research Figures[31] specifically for Ipswich and Suffolk Coastal for 2015 identify a similar level of figures for visitors as the VisitBritain and ONS statistics and are summarised in Figure 10.10 below:

**Figure 10.10: Destination Research Statistics**

| | Ipswich (000's) | | | Suffolk Coastal (000's) | | |
|---|---|---|---|---|---|---|
| | 2014 | 2015 | Change | 2014 | 2015 | Change |
| Domestic Trips | 292 | 290 | -1% | 337 | 311 | -8% |
| Overseas Trips | 49 | 50 | +2% | 45 | 45 | 0 |
| Total | 341 | 340 | 0 | 382 | 356 | -7 |

*Source: Destination Research, Economic Impact of Tourism - Ipswich 2015 and Suffolk Coastal 2015*

10.6.11 Information from the WYG Hotel Managers survey on the source of visitors was mixed, with a number of hotels identifying they did not formally record the origins of guests. In general, International or European visitors were estimated by respondents to account for between 0% and 15% of guests, one budget hotel however estimated that approximately 30% of guests were from outside the UK.

## 10.7 Hotel Performance/Capacity

10.7.1 In looking at hotel performance in the area we have utilised both the latest information from VisitBritain, the ONS, as well as our own data from the 2017 Hotel Managers Survey.

10.7.2 The latest accommodation room occupancy figures from VisitEngland for England include those up to November 2016. These figures show a continued growth in occupancy rates year on year from 2013 to date. The data for the month of November 2016 shows a 3% growth in occupancy, consisting of 2% growth in weekday occupancy and 4% in weekend room occupancy when compared with November 2015. For the year to date, Nov 2015 – Nov 2016, room occupancy growth was recorded as 1%.

10.7.3 Looking at the East of England region, the year to November was showing room occupancy levels of 69% which mirrored the performance of 2015. Occupancy levels in the region in 2013 and 2014 were 64% and 67% respectively.

10.7.4 It is noted that Aecom in their work for Ipswich Central in 2015 reported room occupancy levels in Ipswich of 71.5% in 2013 rising to 73% in 2014, this compared to levels in East Anglia of 71.6% in 2013 and 75.6% in 2014. These levels where based on hotels only rather than the wider accommodation spectrum used by Visit England reported above. However, both measures show continued growth in occupancy levels and indicate that whilst room occupancy levels in Ipswich were increasing, they were not rising as fast as the region as a whole.

[31] Destination Research, Economic Impact of Tourism - Ipswich 2015 and Suffolk Coastal 2015

10.7.5 To supplement our background research surveys of existing hotels have been undertaken. All hotels identified in the two council areas were sent a copy of a questionnaire to allow us to obtain key information and data about them. The questionnaire sought information on occupancy rates for mid week (Monday- Thursday), Friday's, Saturday's and Sunday's. It also sought comments on any season change to occupancy levels. This information assists in understanding how well hotels are performing and when coupled with feedback on denials builds a picture of capacity in the hotel sector and allows analysis of any variations across the two council areas or by hotel type.

10.7.6 Overall occupancy rates for all hotels, based on the 2017 WYG Hotel Managers survey for the previous 12 months was recorded as 71.5%. Weekday occupancy levels were 74.2%, Fridays 72.8 %, Saturdays 78.6% and Sundays 55.6%. These figures demonstrate that occupancy levels are generally higher in the midweek period rather than the weekend. This is particularly true in the Ipswich area where there are a larger number of budget hotels targeting the business customer during the week. Sunday occupancy levels are noticeably lower than the rest of the week. This is not unusual and reflects national occupancy trends.

10.7.7 Average occupancy levels across the week in the two council areas based on the WYG 2017 Hotel Managers Survey were recorded as:

- Ipswich Urban area 68%; and,
- Suffolk Coastal District 74%.

10.7.8 There are some interesting trends in occupancy levels and differences between the Ipswich area and the Suffolk Coastal area which are observed from the 2017 WYG survey. These are summarised in the paragraphs below and are all based upon the last 12 months of trading.

**Mid-week Occupancy**

10.7.9 Average mid-week occupancy rates across the two council areas were recorded at 74%. Of the 8 hotels displaying the highest mid-week occupancy levels, there is a spread across all sectors of the market and these included four at the budget end, two were 3* establishments and two were 4* hotels.

10.7.10 It should be noted that a number of respondents identified that in the midweek period, Tuesday and Wednesday were generally 'busier' than Monday and Thursday.

Ipswich

10.7.11 Average midweek occupancy rates in the Ipswich urban area were recorded as 78%. The highest reported mid-week hotel occupancy levels reported in the WYG survey were 85%. This occupancy level was reported by 2 hotels. There were a further 5 hotels reporting mid-week occupancy levels of 75% or greater.

Suffolk Coastal District

10.7.12 Only 2 hotels in the Suffolk Coastal District reported mid-week occupancy levels of over 75%, with the average mid week occupancy levels recorded as 70%.

### Friday Occupancy

10.7.13 Average Friday Occupancy levels across the two council areas were recorded as 73%. Of the 7 hotels with the highest Friday occupancy levels, only 1 was recorded at the budget level, 4 were 3* hotels and 2 were 4*.

Ipswich

10.7.14 Only 2 hotels in the Ipswich area reported Friday occupancy levels of over 70%, with the average for the area being 60%.

Suffolk Coastal District

10.7.15 7 hotels in the Suffolk Coastal area reported Friday occupancy rates of 85% or more. The average Friday Occupancy in Suffolk Coastal was recorded as 86%. This is significantly higher than that recorded for Ipswich.

### Saturday Occupancy

10.7.16 Average Saturday occupancy rates across the two council areas were recorded as 79%. The Saturday occupancy rates for the eight best performing hotels in Suffolk Coastal were predominantly 3* hotels (five) with two 4* hotels and a single budget hotel. In the Ipswich area, three of the top five performing hotels in terms of occupancy levels on Saturdays were noted to be 4* establishments. The other two were 3* hotels.

Ipswich

10.7.17 The highest occupancy levels on a Saturday for any hotel in the Ipswich urban area is 76%. The majority of Ipswich Hotels that provided figures identified occupancy rates on a Saturday of between 50-70%, with the average recorded as 65%.

Suffolk Coastal District

10.7.18 A number of hotels in Suffolk Coastal District report very high occupancy levels on Saturday's, with 8 hotels identifying occupancy at 85% or greater. This resulted in the average Saturday occupancy being recorded at 92%.

### Sunday Occupancy

10.7.19 Sunday occupancy rates across the area were noted to be lower than other days of the week at 53%, reflecting a general trend in the hotel market. However, again it is noteworthy that Sunday occupancy rates in Suffolk Coastal hotels were in general higher than those in the urban area of Ipswich. Reported averages were:

- Ipswich 41%
- Suffolk Coastal District 66%

### Seasonal Comments on Occupancy

10.7.20 A number of hotels did not identify any seasonal variation in their occupancy levels. Others specified busy periods as the school summer holiday period, Christmas, Valentines and linked to specific events. A number of hotels in the Ipswich area referenced spikes in trade resulting from events at Jimmy's Farm and 'Hot Rod Weekends' at Foxhall Stadium.

### Denials

10.7.21 When hotels turn away business because they are already fully booked, this is referred to as denied trade. As part of the Hotel Managers Survey, questions about the number and trends in denied trade were posed. Evidence of denied trade indicates that demand for rooms exceeds supply. This excessive demand can be related to particular days of the week, relate to seasonal variations, reflect specific locations, cost of rooms, status of hotels etc. It would be expected that there would be a link between denials and occupancy levels.

10.7.22 80% of respondents identified denials occurred at their premises at some point over the week. Geographically the hotels denying trade were spread across the two Council areas. What is particularly noteworthy is that all respondents to the survey from the Suffolk Coastal area identified denying trade at some point in the week (Monday – Friday) and all denied trade on Saturdays. This reflects the 92% occupancy rates recorded in the area on a Saturday.

10.7.23 The majority of respondents identified that denials numbered between 1-5 a week, although one large hotel in central Ipswich identified in excess of 21 denials on average per week. Denials were spread across the week, Mon - Thur and also on Fridays and Saturdays. Only two hotels identified Sunday denials. Seasonal variations are noted in respect of the denials. Summer denials were more commonly reported in the Suffolk Coastal area and in particular at the higher end of the market.

10.7.24 In the budget sector denials were identified as being more common generally in the mid week and on Saturdays. Denials were identified as being more likely in school holiday periods in the mid week, particularly in the summer.

## Purposes of Visitors Stay

10.7.25 The purpose of visitors stays was sparsely recorded by respondents to the WYG Hotel Managers Survey. The responses received, demonstrated that budget hotels in the Ipswich relied heavily on business customers. With these guests accounting for between 60-70% of stays. The majority of other guests were identified as visiting friends or attending weddings/events.

10.7.26 There was no specific pattern in Suffolk Coastal as an area generally, other than the level of leisure visits was generally identified to be higher than for hotels in the Ipswich area. What was notable was that a number of hotels in Suffolk Coastal area did rely heavily on conference, weddings or golf visits, reflecting the market that the specific hotels targeted.

## Length of stay

10.7.27 As with guests origins this was a question not all respondents answered. Analysis of those that did respond, identified that the average length of stay can be summarised as:

- 1 night – 46%
- 2 nights – 34%
- 3 nights – 14%
- 4 – seven night – 6%
- +7 nights – less than 1%

## Customer Satisfaction

10.7.28 Comments on customer satisfaction were not directly sought as part of the Hotel Manager Survey, however, travel search engines provide a good source of information on customer satisfaction.

10.7.29 Interrogation of Tripadvisor (February 2017) identified that in terms of customer satisfaction The Salthouse Hotel in Ipswich was rated the fifth best hotel in the County and the best in the town (scoring 4.5 out of 5 based on in excess of 1,200 reviews. Other points of note include:

- Of the 15 hotels identified in Ipswich by Tripadvisor, 14 of these were rated 3.5 out of 5 or better.
- Of the 6 hotels Identified in Felixstowe by Tripadvisor, 5 of these were rated 3.5 out of 5 or better.
- Of the 4 hotels identified in Woodbridge by Tripadvisor, all were rated 4 out of 5 or better.

10.7.30 On the whole customer satisfaction levels for hotels in the two Council areas was high, albeit with some exceptions. The high number of reviews for the hotels adds credibility to the reviews given and show a continued high level of satisfaction generally across a longer period. Poorer reviews were generally concentrated at the lower end of the market and in some cases related to establishments that have closed or been reopened under new management. It was also noted that the lower scoring hotels often had fewer reviews, therefore their overall score could be more heavily influenced by a smaller number of dissatisfied customers.

**Future Plans**

10.7.31 As part of the Hotel Managers survey questions were posed to managers regarding their intentions for further investment into their establishments.

10.7.32 On the basis of the responses, managers confidence can only be described as mixed. 55% of respondents to the Hotel Managers Survey anticipated an increase in demand for rooms over the next 2 year period with the remainder suggesting a 'plateauing' or decrease in demand. A number of respondents specifically identified 'diversion' of trade from their hotel through the recent opening of new hotels within their chains either in or near the area.

10.7.33 There was a difference between the two council areas with Ipswich being split 50/50 from those respondents who answered the question. Suffolk Coastal respondents were more upbeat with 70% anticipating an increase in demand for rooms over the next 2 years.

10.7.34 Notwithstanding the expectation from a good number of managers that demand for hotel rooms was anticipated to increase in the short term, there was only one Manager who suggested they would be actively seeking to increase the number of rooms at their hotel in the next 1-2 years. This respondent was located in Suffolk Coastal area. This suggests that it is considered there is some 'slack in the system' to improve existing occupancy rates further without increasing the supply of rooms.

10.7.35 Over a third of respondents to the survey suggested that they were looking to invest in the hotel in the next 24 months, with refurbishment of rooms and the enhancement of facilities/services at the hotel identified. Again the response to this was biased towards hotels in Suffolk Coastal, with hotels in Ipswich less likely to be investing in the short term. This may in part be due to the larger number of new and or recently refurbished hotels in the Ipswich area.

## 10.8 Future Hotel Demand

10.8.1 As set out earlier in this study there is a clear growth agenda for Ipswich Borough generally, this is contrasted to a degree with Suffolk Coastal where the requirement for growth must be considered in the light of the more rural and highly valued landscape which characterises the majority of the district.

10.8.2 The desire to increase visitor numbers to Ipswich is somewhat less constrained in that there is assessed to be capacity to increase numbers. This again is in contrast with Suffolk Coastal where there appears to be a concern, particularly from the DMO, that there needs to be a very careful balance struck between encouraging tourism, but not at the expense of the quality of the area. It is the high quality, and to some extent, the tranquillity of the Suffolk Coastal area which is one of its most important assets.

10.8.3 Whether or not there is a need to increase hotel supply in the two council areas in part depends upon what is drawing visitors to the area. The influence of the wider economic situation should also not be underestimated. The 'Brexit' effect and the uncertainty around that, has the potential to reduce confidence and result in a slowdown in growth generally. Indeed, this has been the case, with GDP growth slowing following the Brexit vote, albeit it remains better than some analysts forecast.

## Key attractors

10.8.4 Key attractors in the two Council areas which drive tourism and potential overnight accommodation requirements include both attractions and events. The key attractions/events are set out in Figure 10.11 below.

**Figure 10.11: Key Attractions/Events in the Two Council Areas**

| Attraction | Event |
|---|---|
| **Ipswich** | |
| Ipswich Museum | Ipswich Music Day 2017 |
| Christchurch Mansion | Ipswich Festival |
| Ipswich Transport Museum | Ipswich Maritime Festival 2017 |
| Ipswich Art Gallery | SPILL |
| DanceEast | Ipswich Wheels |
| Ipswich Waterfront | Ipswich Mela |
| Ipswich Town Football Club | Ipswich Jazz Festival |
| Ipswich Regent Theatre | Classics on the Quay |
| New Wolsey Theatre | Global Rhythm |
| Orwell River Cruises | Oktoberfest |
| Victor Cruises | Holi Festivals |
| Allen Gardiner River Cruise | |
| **Suffolk Coastal** | |
| Bawdsey Radar Station | Suffolk Show |
| Woodbridge Tide Mill | Aldeburgh Festival |
| Snape Maltings | Aldeburgh Food and Drink Festival |
| Sutton Hoo | |
| RSPB Minsmere Nature Reserve | |
| Felixstowe Pier | |
| Landguard Fort, Felixstowe | |
| Lanman Museum | |
| Framlingham Castle | |

10.8.5 Whilst the events and attractions across Ipswich and Suffolk Coastal areas are diverse, the area lacks a single large destination that drives a significant numbers of visitors and which may generate additional demand for hotel rooms. To illustrate this, we have reviewed the top 'paid' and 'free' attractions in the region. It is noted that in the top 20 most visited paying attractions in the East of England region in 2015 published by Visit England[32] there are two destinations located in the two Council areas, both within Suffolk Coastal:

- RSPB Minsmere Nature Reserve – is ranked 15th and is identified as attracting 123,428 visitors in 2015, an increase of some 12.1% on 2014.
- Sutton Hoo – is ranked 20th attracting 101,216 visitors in 2015 a 2% decrease from the visitors recorded in 2014.

10.8.6 As a comparison the top ranking attraction in the region is Colchester Zoo attracting some 964,050 visitors in both 2014 and 2015.

10.8.7 In respect of the top 20 free attractions the VisitEngland survey[33] identifies two in the survey area:

- Lanman Museum, Framlingham – ranked 12th with an estimated 50,000 visitors in 2014 and 2015.
- Ipswich Museum – ranked 14th with 45,007 visitors in 2015 a 27% increase on the visitor numbers recorded in 2014.

10.8.8 The top ranking free attraction in the region in 2015 was identified as the Fitzwilliam Museum in Cambridge attracting some 417,781 visitors in 2015.

### Developer/Operator Interest

10.8.9 Our research and telephone interviews with hotel developers/operators have identified interest from a number of operators to find locations for hotels, notably in Ipswich. We contacted a number of national operators including Travelodge, Whitbread (Premier Inn), London and Regional and the Cairn Hotel Group. Where operators/developers were content for their aspirations to be identified we have included them in this section, where their interests were commercially sensitive an overview of interest has been identified.

[32] Most Visited Paid Attractions – East of England 2015, VisitEngland, 2016
[33] Most Visited Free Attractions – East of England 2015, VisitEngland, 2016

Ipswich

10.8.10 Travelodge publish 'Target Locations' and their most recent list from July 2016 identifies requirements for Ipswich and Felixstowe. Travelodge, whilst already being represented in Ipswich and notwithstanding the recent approval of the EasyHotel clearly feel there is capacity for further representation in the town. Following pre-application discussions Travelodge have recently submitted a planning application for a further 100 bed hotel in the town.

10.8.11 As reported above a speculative 60 bed hotel also forms part of a large residential led mixed use scheme on Grafton Way on the town.

10.8.12 A number of hotel developers who deliver hotels for national brands have identified that they would be interested in bringing forward a hotel in Ipswich. Those who have expressed an interest to provide a new hotel in Ipswich have identified a requirement for representation in a town centre or edge-of-centre location. In terms of nature of hotel, new build has been identified as the preference, albeit some developers would consider conversion of existing buildings, particularly vacant office floorspace. The requirement identified by developers is for a hotel of minimum 80-100 rooms, ideally accompanied by a complementary food and drink offer. Most considered that a 3 star offer and /or 3 star select offer would be what they consider would best fit with the provision currently in the town. All confirmed that they were actively seeking representation in the short term to 'meet an identified need'. Those developers that were spoken to identified that they were generally confident of the market at this point in time, particularly in the East and South East of the Country, given the proximity to, and influence of, London. Some, whilst confident, expressed they were less confident than 12 months ago, reasons for this included continued uncertainty over Brexit and the ability to access funding. In regard to Ipswich one developer stated that they 'would love to see opportunities' in terms of ability to invest in new hotel floorspace. Another respondent identified they would 'work with the Council to deliver any standard of hotel required to meet a gap in the market'. This comment suggests strong confidence in the hotel sector generally in the town.

10.8.13 The number of developers indicating an interest in Ipswich does not necessarily correspond to the number of hotels needed or likely to come forward. A number of developers bring forward hotels for the same brands/chains and as such compete with one another for sites and opportunities. However, there is clearly a keen interest in Ipswich as a destination to provide further hotel bed spaces. In considering demand and existing supply, there are noted to be some 'ever present' hotel operators who are not represented in the Ipswich urban area, such as, Holiday Inn Express, Ibis and Hilton. Ramada Encore are also not present having recently sold their establishment to Penta Hotels. However, the fact that some major hotel chains are not represented suggests that there remains some scope to accommodate further brands. In summary, there is active interest in Ipswich from hotel operators and developers to bring forward 3 or 3* hotels in central or edge of centre sites in the short term. This is in addition to 'live' proposals from Travelodge and the Grafton Way proposals.

Suffolk Coastal District

10.8.14 In respect of Suffolk Coastal, Travelodge are noted to have a requirement for representation in Felixstowe. They are not represented in the town currently. A new hotel has previously been identified as being required in the town through the Suffolk Coast Tourist Strategy. A scheme for a conference hotel and shops was suggested for the Convalescent Hill site in the town but failed to materialise. A hotel was also part of the initial Walton Green plans but has since fallen away. Since then, the Ordnance Hotel site has been re-developed to provide the Premier Inn (60 beds). This significant addition to the supply of hotel rooms in the town is likely to result in a period of consolidation and may cool demand for further representation in the short term.

10.8.15 No demand for representation in Felixstowe has been identified from our telephone discussions with developers/operators, other than the aforementioned Travelodge.

10.8.16 Premier Inn identifies a requirement for representation in the Woodbridge/Martlesham Heath area of Suffolk Coastal. It has been noted earlier in this study that there is a general lack of mainstream budget hotels in the Suffolk Coastal area. Woodbridge also offers the physical benefits of being located close to Ipswich but with easy access to some of the tourist 'hot spots' in Suffolk Coastal area. Hotels in this area have the potential to serve and supplement both markets.

10.8.17 A number of respondents identified that they did not have an active requirement in the two Council areas at this point in time. Reasons for this included due to concentrating on other regions or due to a limited development program at this juncture.

10.8.18 In respect of other towns in Suffolk Coastal District, no developer/operator interest was identified through our work in Aldeburgh, Saxmundham, Framlingham or Leiston.

## 10.9 Hotel Demand

10.9.1 When hotel occupancy levels of 70% or greater are consistently recorded in an area, this is an indicator that the demand for hotel rooms is such that the market can quantitatively accommodate further provision without significant effect. In this instance the average occupancy in the Ipswich area is marginally below 70%. Suffolk Coastal however is well above 70% with the results from our surveying suggesting average occupancy of 74%. Whilst there are many other factors that also influence demand for new hotel bedrooms, on this simple indicator, it is suggested that demand for additional bedrooms at this time is more keenly felt in Suffolk Coastal than Ipswich. The lower occupancy rates in Ipswich may in part be as a result of the significant increase in supply of bedrooms in the town over recent years. However, on the basis of developer interest Ipswich would appear to remain a target for further growth and representation by operators.

10.9.2 It is recommended that any proposals to significantly enhance Ipswich Borough or Suffolk Coastal District to tourists or visitors generally through new attractions (such as a conference centre) or major events, take account of existing and planned hotel provision. New development or attractions often act as a catalyst for further investment in related businesses. Equally enhancements to the economy generally, particularly resulting in any significant increase in business/office floorspace is likely to result in an uplift in demand for hotel bedrooms. Importantly, account should also be taken of the significant increase in hotel bedroom supply in recent years, particularly in the Ipswich area to avoid a potential oversupply in the short term.

10.9.3 The addition of the EasyHotel in 2017 will result in the hotel room numbers in the Ipswich urban area increasing to approximately 1,430 from approximately 1,060 pre 2012. This is a significant uplift of almost 35% over a 5 year period. This compares to average annual growth in the regions of 1.5% over the period 1995-2015[34]. Using these growth rates it would have been expected that Ipswich would have increased room supply from 1,060 rooms in 2011 to around 1,160 in 2017. Over the same period it is noted that Colchester with a similar population level to Ipswich has seen delivery of just over 110 additional hotel rooms. This included a boutique hotel of 26 rooms in 2015 and a budget (Premier Inn) in 2016 delivering 85 bedrooms.

10.9.4 The room uplift over the same period for the Suffolk Coastal area is far more limited at just over 10%. However, the accommodation is spread widely across the district and it is notable that the additional 60 rooms in Felixstowe represents an uplift of approximately 40% for the town, when considered in isolation. This level of growth still outstrips average growth rates in hotel room numbers based on the PWC figures[35].

10.9.5 An assessment of when additional visitors may be attracted should be compared to the occupancy rates for hotels. Whilst occupancy rates in the area are high overall, there is clearly still capacity to increase occupancy levels to be on par with other areas of the County and region. There are obvious peaks in occupancy levels in some areas due to demand which relate to events or periods of the week where there is less opportunity to meet demand. However, there appears to be existing capacity at the weekend in the Ipswich urban area, although account should be taken of whether the available capacity is of the nature required or in the most appropriate location. Conversely there appears to be little capacity in Suffolk Coastal area hotels over the weekend (Friday/Saturday). Given the close proximity of Ipswich to Suffolk Coastal it may be that some denied trade for rooms within Suffolk Coastal is being met by Ipswich. The two Council areas however, offer very different experiences and as such denied trade in Suffolk Coastal may simply be lost, rather than 'diverted' to Ipswich.

[34] PwC, UK Hotels Forecast 2017, September 2016
[35] PwC, UK Hotels Forecast 2017, September 2016

10.9.6 Promotion of better links between the two areas, as is being done by the DMO's, can help to minimise lost trade. However, a careful balance needs to be struck between demand and supply. Whilst there is evidence of quantitative capacity in the hotel market, qualitatively that capacity in the system may not be what is demanded, geographically or in terms of sector. That would certainly appear to be the case in both Council areas. Whilst a number of hotels in Suffolk Coastal are operating at capacity at the weekends and denying trade, this is not the case for all hotels in the area. Similarly, in Ipswich, budget hotels are often at capacity in the mid week and denying trade, but other sectors of the market operate at much lower occupancy levels. The WYG Hotel Managers survey would suggest there is unmet demand in Ipswich in the midweek for budget rooms. However, there would appear to be capacity in other standards of hotel in the mid week at this point in time.

10.9.7 Qualitatively, provision in Ipswich is assessed to be good in the budget and middle order (3* and 4*). However, there appears to be gaps at the top and bottom of the market, with no 5* provision or hostel/super budget provision. There are existing good quality 4* hotels in the town which have capacity, as such given the maturing hotel market in the town, there may not be a need for 5* representation at this point. A small or boutique independent high quality offer may have some appeal, particularly if linked with a high quality attraction or food offer. In respect of the super budget provision, this gap will be filled with the EasyHotel due to open later in the year. Provision of a hostel in the town would however 'fill a gap'.

10.9.8 Within Suffolk Coastal, there would appear to be a quantitative deficiency in the budget sector and there is also no 5* provision. Given the large size geographically of Suffolk Coastal District and its attractive rural environment there are also a limited number of spa/leisure resorts. Given the nature of Suffolk Coastal District and existing hotel market generally being targeted to the leisure offer rather than a business offer, it is questionable whether qualitatively there is a demand for further budget provision in the area.

10.9.9 The attitudes of existing hotel managers/operators is also interesting, in that whilst there are significant levels of denied trade across the two Council areas, very few have identified that they are seeking to expand room numbers in the short term. This reflects to a degree the uncertainty around the existing levels of visitor numbers and whether or not these are likely to increase in the short term.

10.9.10 Quantitatively, the need for additional hotels in the future will be greatly influenced by the economic fortunes of the area and whether there is any significant step change in the area in terms of attractions/features. Any projections for increases in room numbers should therefore be treated with caution. The growth agenda for Ipswich generally will increase demand for hotel rooms simply by increasing the level of economic activity and number of residents in the urban area. Development of a flagship attraction or destination would increase demand in its own right. Where such an attraction/destination draws visitors from further afield, it has the potential to create significant demand for overnight accommodation. A year round attraction provides less fluctuation in demand for room numbers and as such would provide greater certainty to hotel investors/developers.

10.9.11 Figure 10.12 below takes the existing room numbers in Ipswich and Suffolk Coastal areas and projects hotel room number growth based on the historic average for the regions excluding London (1995-2015) of 1.5% growth per annum for the plan period. This is purely an exercise in estimating potential growth simply using historic trends. It does not take account of the recent growth in the area, particularly Ipswich, nor the impact of increased levels of activity or new attractions in the area.

**Figure 10.12: Projected Hotel Room Growth**

| Location | Projected hotel room growth over the plan period based on annual growth of 1.5% | | | | | | Total before Commitments | Total after Commitments |
|---|---|---|---|---|---|---|---|---|
| | Base 2017 | 2020 | 2024 | 2028 | 2032 | 2036 | 2036 | 2036 |
| Ipswich | 1,333 | 1,394 | 1,479 | 1,570 | 1,667 | 1,769 | 436 | 342 |
| Suffolk Coastal | 820 | 857 | 910 | 966 | 1,025 | 1,088 | 268 | 268 |
| **Total** | **2,153** | **2,251** | **2,389** | **2,536** | **2,692** | **2,857** | **704** | **610** |

*Notes: The commitment in Ipswich is the EasyHotel (94 beds)*

10.9.12 Figure 10.11 identifies the potential for growth in the order of 436 rooms in Ipswich over the plan period to 2036 and 268 in Suffolk Coastal. This assumed 1.5% growth per annum equates to approximately 30% uplift over the plan period. A growth of 436 rooms is approximately double the growth experienced in the town in the last 5 years and would be the equivalent of opening 4 more hotels the size of the Novotel or 6 the size of Salthouse.

10.9.13 It is suggested that this rate of growth is optimistic given the rapid growth in Ipswich and to a lesser extent Suffolk Coastal in recent years. The fact that existing occupancy levels have room for improvement is also likely to result in some dampening of demand, which will cool to some extent the desire to build further hotels. In addition, assuming the EasyHotel does open later in the year this will bring the room numbers in Ipswich up to levels that, would on average growth rates, not have been expected to be reached until 2022. Taking account of the commitment of the EasyHotel would result in potential growth of 342 further rooms over the plan period. The recent rapid growth in room numbers is unlikely to be sustainable and as such reverting to a longer-term growth rate is assessed to be a robust assessment of likely future growth.

10.9.14 To demonstrate the sensitivity of these figures, if 2012 was used as the base year (prior to the recent rapid expansion of rooms), then the current 2017 room numbers would not have been projected to be met until 2024 in the case of Ipswich and 2018 in the case of Suffolk Coastal. This suggests that the growth rates in Suffolk Coastal are in general reflecting the national trends. Ipswich is markedly ahead.

10.9.15 Using the 2012 room numbers as a base for projecting future demand, rather than 2017, then room projections for 2036 would be 1,597 for Ipswich and 1,072 for Suffolk Coastal. In the case of Ipswich this gives a difference in the projections of some 170 rooms over the plan period, albeit still resulting in potential increase in room numbers of 264 from the current figures.

10.9.16 It is clear that over the plan period even assuming a status quo in terms of the desirability of the two Council areas, both qualitatively and quantitatively there will be a demand for further hotel bed spaces. Having regard to the fact there are limited commitments for further hotels it is considered that the Councils should give consideration to promoting appropriate sites for hotels. The level of increased demand will be greatly influenced by the level of economic growth and investment in the two Council areas, which at this stage is not possible to predict. As previously stated the potential projected growth in hotel rooms identified above should be treated with caution.

10.9.17 The following paragraphs seek to identify positive and negative factors which are likely to influence room growth over the plan period.

### Positives for investment

- DMO's have been established for both Ipswich Urban Area and Suffolk Coastal. These organisations have the ability to focus the business and tourist communities in seeking to increase visitor numbers in a focused and controlled manner. A balance between increasing visitor numbers and other ancillary services needs to be struck to ensure that the facilities required by visitors can cope with additional footfall. This would include looking at restaurant and leisure provision. The DMO's can also be a conduit for providing tourism information and promoting events. Events targeting the 'out of season' periods can be a good way of building a year round market for tourism and hotel accommodation, particularly when events have a greater than local influence and attract overnight visitors.

- Economic Growth Agenda – Increasing the employment opportunities in the two Council areas will result in a proportional increase in demand for business overnight stay. The significant growth in new jobs set out in the LEP and funding that accompanies this, along with the City Deal and Enterprise Zone status for Ipswich will deliver a new job opportunities as well as supporting investment in skills and training. The visitor economy is identified as a particular target for delivering growth and stability in the wider Region. Such increased investment in the general economy of Ipswich and Suffolk Coastal will offer opportunities for further hotel development, both new build, evidenced by the two current applications with Ipswich Council and through refurbishment and investment in existing stock by existing operators to ensure established hotels remain competitive. If investment includes new tourism and or leisure attractions, then this will have a knock on effect in increased demand for overnight trips in the immediate vicinity. Until such investment and opportunities are delivered and established it is difficult to be sure of the extent of additional demand created for accommodation. This must also be tempered with the reduced economic growth targets nationally. In terms of housing, Ipswich is projected to increase its population significantly over the plan period. More residents in the area will result in increase in demand for hotel rooms due to the uplift in people visiting friends and relatives. The development industry itself also creates a demand for hotel accommodation during construction periods although this increase in demand is temporary only.

- Ipswich – The Town and Waterfront has already benefited from investment and development. The Waterfront area especially has emerged as a destination in its own right and has the potential to be the focus for further development. There are numerous potential development sites in Ipswich town centre which offer the potential for providing hotels as standalone developments or as part of mixed use proposals. These sites are considered in Section 11 of this study.

- Suffolk Coast AONB Quality environment – The Suffolk Coast has long been identified as a popular tourist destination and the quality of the rural environment and seascape continues to attract visitors. The balance recognised by Suffolk Coast DMO to ensure that increases in tourist numbers do not have a detrimental impact on the area is crucial. Existing 'hot spots' have an environmental and physical capacity. The aim here, we would suggest, is to encourage longer dwell times rather than necessarily increase numbers overall. 'Converting' day visitors to overnight visitors through ensuring a balanced supply of hotel rooms could well have both a financial and environmental benefit to the area. Careful consideration would need to be given to finding appropriate locations to provide additional rooms. It should be recognised that the best opportunities for increasing room numbers may be through the extension of exiting premises and or the change of use of existing buildings. It is noted that Ipswich DMO seek to market Ipswich as a hub location for visits to Suffolk Coast and the wider County.

- Sizewell C – Should the Sizewell C project move forward, then this has the opportunity to have an impact on the demand for hotel accommodation in the two Council areas, particularly Suffolk Coastal. The project would take approximately 10 years to construct and would result in upwards of 25,000 new jobs during that period. Whilst initial options include the provision of a bespoke accommodation campus for the period of construction to house workers, this accommodation will not accommodate all workers. Estimates suggest that there is likely to be requirement for in the order 1700 workers to find accommodation locally. A number of these workers are likely to require hotel accommodation. This could be a potential significant benefit to serviced accommodation providers in the area, particularly in the off-peak tourist periods. Geographically Sizewell is located close to Aldeburgh and Leiston, but is some distance from any concentration of hotels, notably budget hotels which are often favoured for business use.

- Under supply in the area – The level of denials across the study area at different times of the week would suggest that there is an under supply of rooms. However, it is not clear that the level of under supply is so acute or has been sustained for a sufficient period of time to justify existing operators making further investment. It should also be recognised that there has been rapid growth in the number of rooms in the Ipswich area over recent years and the market needs to be given some time to adjust. Conversely, if Felixstowe is excluded, the supply of hotel rooms in Suffolk Coastal has been consistent for a long period.

**Barriers to investment**

- Brexit and Economic Uncertainty – the full effects of Brexit are not yet known and most commentators assess that economic growth is expected to be slow in the short term. As discussed in Section 4 of this study a key effect of Brexit to date has been a devaluation of the pound. All other things being equal this makes the UK a more attractive (cheaper) destination for overseas travellers. Equally it makes trips abroad for UK resident's proportionality more expensive and therefore 'staycations' and short breaks in the UK are likely to seem more attractive. However, the wider economic uncertainty is likely to result in slower growth generally, with reduced demand for conference facilities, business travel and spend expected. It has to be recognised that in terms of overseas visitors the 2017 WYG Hotel Managers Survey identifies this is a very small proportion of the hotel market. This is also reflected in the ONS figures reported. As such in the two Council areas it is not considered that the devaluation of the pound will result in a significant uplift in international visitors to the benefit of the local economy. Uncertainty in the financial markets also provides an interesting conundrum in terms of investment. Until such time as a Brexit deal is agreed, there would be expected to be a reluctance for investors to risk capital in further hotel development in the UK. Particularly when there are other markets which offer potential for growth with lesser risk. However, indications from those developers spoken to as part of this study, suggests that confidence remains high.

- Sizewell C – as a counter balance to the potential positive demand for hotel bed spaces relating to the development, could be the environmental impacts and disruption associated with the development. These impacts whether real or perceived could result in reduced demand for serviced accommodation, including hotel bed spaces during the lengthy construction period. A separate side to this is, that if Sizewell C results in a significant uplift in demand for bed spaces it may well reduce the number of bed spaces available to the tourist market. Whilst not necessarily having an adverse impact on hotel occupancy, it would not result in appositive effect across the tourism market generally.

- Competition – Airbnb and other similar accommodation platforms such as Flipkey.com, HomeAway.com and VRBO.com continue to gather momentum, particularly in the leisure market. The number of listings in the area is significant and will have some effect on demand for traditional hotel accommodation, particularly from people owning second homes looking to generate additional income. Serviced apartments are an established competitor in the accommodation market and have traditionally targeted the business market. The evidence from the study we have undertaken is that such accommodation in the area is very limited.

- Planning and availability of suitably located sites – There is no evidence of the planning system or process acting as a barrier to hotel development in the study area. Indeed to the contrary in the two Council areas hotel development has generally been encouraged. Albeit not all commitments have been taken up in recent years in Ipswich.

- Landscape and environmental restrictions in the AONB – whilst this affects Suffolk Coastal area only, provision of hotels in rural locations can be fraught with difficulties. Equally provision within the smaller towns and villages can be difficult given heritage considerations or simply due to the compact centres offering few development opportunities. Where land may be available, there are often competing interests for the land, not least to provide housing.

## 10.10 Summary

### Ipswich Borough

10.10.1 The hotel market in Ipswich has seen a significant uplift in room numbers in the last 5 years, far in excess of average growth rates in the UK. The growth in room numbers has been heavily biased towards the budget market. This may to some extent reflect Ipswich 'catching up' from a low base point and explain the current occupancy rates of 68%. However, the introduction of a significant number of additional rooms has increased choice and supply in the market generally and it is suggested that the market is still adjusting to some extent. Notwithstanding this, based on our assessment of the hotel market, the economic growth agenda generally and feedback from hotel operators and developers we consider the prospects for further hotel development in Ipswich to be promising. We would anticipate there being opportunities for the development of further hotels over the plan period both in the short and medium term. In the short-term interest would appear to be in providing rooms in the 3* standard with varying levels of service, but accompanied by a food and drink offer. Developers would appear to be interested in any form of delivery to provide around 100 rooms. Given the large number of hotels already located on the primary road network, locations in the town with easy access to services, facilities and amenities including the Waterfront, would seem to be the most appealing options.

10.10.2 The budget market is well provided for in Ipswich and, with the addition of the EasyHotel at the 'super budget' end of the market later in the year, there would appear to be limited capacity for further growth in this part of the market at this point. There is however a clear gap in the hostel sector, with no such provision in the Ipswich area.

10.10.3 The Ipswich area also has a reasonable level of 3* Hotels. 4* provision is more limited however and there is no 5* provision. As such there may also be opportunities for higher quality provision, particularly in small scale boutique style establishments.

10.10.4 Hotels with large conference facilities, capable of accommodating business meetings, functions (including weddings) and small conferences, are limited in the town, but demand for these is more bespoke and it is noted that facilities at Copdock have recently been improved. In addition, other venues in the town provide conference facilities, such as the football club, which will impact on the demand for conference hotel venues. Whilst the stakeholder event suggested the town lacks a large conference venue the current level of facilities in the town are not considered to be untypical for a town of the size of Ipswich. A centrally located conference venue potentially with hotel would however be an asset to the town and could also complement the University campus.

10.10.5 Ipswich's occupancy levels at 68% are lower than the national average and can possibly be explained due to the rapid expansion of hotel room numbers in recent years. This suggests that there is capacity in the existing market to accommodate additional visitors, albeit there would appear to be limited capacity at peak times. The occupancy levels also partly explain the limited number of exiting hotels looking to extend room numbers on their sites.

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

**Suffolk Coastal District**

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

10.10.8 There are similar numbers of 3* and 4* hotels in Suffolk Coastal with both being well provided for. Notwithstanding the attractive rural setting of the district, there are few leisure/spa resorts. This would appear to be an area for potential growth and could be linked with 5* provision given there are no such hotels in Suffolk Coastal. In terms of budget provision in the District, there would appear to be some capacity for further provision and this is reflected by operator requirements in both Felixstowe and Woodbridge areas.

10.10.9 Projecting historic growth rates forward would suggest potential need for a further 268 rooms over the plan period.

# 11.0 Assessment of Potential Development Sites in Ipswich

## 11.1 Introduction

11.1.1 This section of the study provides a 'high level' assessment of the availability and suitability of 19 sites identified by Ipswich Borough Council within central Ipswich that could potentially support identified needs for new retail and/or commercial leisure floorspace over the emerging plan period (to 2036). These sites are in the main existing allocations in the 2017 Ipswich Local Plan.

11.1.2 We provide a summary of the potential capacity of each site below. The assessments take into account the following factors:

- existing land uses;
- surrounding land uses;
- planning policy matters;
- planning history;
- accessibility; and
- potential constraints to development.

11.1.3 A plan showing the location of the potential development sites is attached at **Appendix T**. Full site assessments are provided at **Appendix U.**

11.1.4 Figure 11.1 summarises the potential scale of additional retail/commercial development, character of potential development, timescales for delivery and suggests a level of potential floorspace for each site based on the assessment undertaken.

11.1.5 The scale of development, in terms of retail and commercial leisure floorspace, for the purposes of the table has been defined as follows:

- Small scale – up to 1,000 sq m (gross) floorspace or small size hotel (up to 40 beds).
- Medium scale – 1,000 – 2,500 sq m (gross) floorspace or medium size hotel (41-80 beds).
- Large scale – in excess of 2,500 sq m (gross) floorspace or large size hotel (81+ beds).

11.1.6 In terms of timescales set out in the table, these are summarised as short, medium or long term:

- Short term – prior to 2022.
- Medium term – 2023-2028.
- Long term – 2029-2036.

11.1.7 The extent of the assessments, whilst identifying whether sites are in single or multiple ownership, do not go as far to explore the length of unexpired leases, restrictive covenants nor have there been discussions with site owners as to their intentions/aspirations for sites. As such the site assessments provide a useful guide as to the suitability and availability of sites to meet future capacity but are not definitive. In addition, the information and conclusions of the site assessments do not imply that retail/leisure development on the sites will be granted planning permission by the Council.

**Figure 11.1: Summary of Site Assessments**

| Site | | Potential Scale of Retail/Leisure | Potential Character of development | Timescales | Potential A1 Retail / Commercial Leisure Floorspace (sq m gross) |
|---|---|---|---|---|---|
| 1 | St Peter's Port | Large | Potential for multi-storey mixed-use development with hotel provision and small-scale retail/leisure uses on ground floor. | Short to medium term | - A1 (convenience): up to 100sq m<br>- A3: up to 800sq m<br>- C1 Hotel: up to 2 medium or 1 large hotel<br>- D2 Gym (potentially forming part of hotel provision) |
| 2 | Regatta Quay | Large | Construction due to restart in early 2018 on multi-storey residential led development with retail/leisure on ground floor | Short term | - A3/A4: 465m gross |
| 3 | 4 College Street & Beason Site | Large | Potential for retail/leisure uses on ground floor as part of a multi-storey residential or office led redevelopment | Short to medium term | Across the three sites –<br><br>- A1 (convenience): up to 400sq m<br>- A3: up to 2,000sq m<br>- D2 Gym (potentially at first floor level) |
| 4 | Burtons Warehouse | | Potential for retail/leisure uses on ground floor as part of a multi-storey residential led redevelopment | Short to medium term | |
| 5 | Former St Peters Warehouse | | Potential for retail/leisure uses on ground floor as part of a multi-storey residential led redevelopment | Short to medium term | |
| 6 | Merchant Quarter | Small | Potential for small scale retail/leisure uses on ground floor as part of a multi-storey residential or office led redevelopment | Short to medium term | - A1 (convenience): up to 200sq m<br>- A3: up to 500sq m |
| 7 | Peter's Ice Cream | Small | Small scale retail/leisure units as part of an extension to Grimwade Local Centre | Short to medium term | - A1 (convenience): up to 100sq m |
| 8 | Lower Orwell Street/Star Lane | Site considered to be more suitable for non-retail/leisure development | | | |
| 9 | Foundation Street/ Star Lane | Site considered to be more suitable for non-retail/leisure development | | | |

| Site | | Potential Scale of Retail/Leisure | Potential Character of development | Timescales | Potential A1 Retail / Commercial Leisure Floorspace (sq m gross) |
|---|---|---|---|---|---|
| 10 | Star Lane | Large | Small scale retail as part of a multi-storey office or residential led scheme | Short to medium term | Across the two sites:<br><br>- A1 (convenience): up to 400sq m<br>- A3: up to 250sq m<br>- C1 Hotel: up to 2 medium or 1 large hotel<br>- D2 Gym (potentially forming part of hotel provision) |
| 11 | Star Lane/ Turret Lane/ Rose Lane | | Small scale retail as part of a multi-storey office or residential led scheme | Medium term | |
| 12 | Westgate | Medium | Residential led mixed use development with medium scale retail/leisure. | Medium term | - A1 (comparison): up to 2,000sq m<br>- A3: up to 170sq m<br>D2: up to 370sq m |
| 13 | Mint Quarter | Large | Large scale, large floorplate, A1 retail led mixed use redevelopment involving residential and A3/A4 floorspace | Medium term | - A1 (comparison): up to 8,000sq m (uplift)<br>- A1 (convenience): up to 2,000sq m<br>- A3: up to 750sq m |
| 14 | Grafton Way | Large | Mixed use development residential/commercial development including hotel, gym, and ancillary retail/leisure floorspace on ground floor | Short to medium term | - A3: up to 500sq m<br>- C1 Hotel: up to 2 medium or 1 large hotel<br>- D2: Gym |
| 15 | Town Hall/Post Office | Large | Conversion/refurbishment of existing listed buildings to A1/A3/C1/D2 type uses | Town Hall – Short term<br>Former PO – Short/medium term | - Town Hall – A1/A3/D2: up to 2,300sq m or small C1 Hotel<br>- Former PO - A1/A3/D2: up to 943sq m or small C1 Hotel |
| 16 | Former Great White Horse Hotel | The site is being developed for office units and extension to Starbucks. | | | |
| 17 | Former Odeon Cinema | Medium-Large | Mixed use arts and cultural leisure redevelopment with limited A3/A4 floorspace to complement The Regent | Short term | - A3: Up to 200sq m<br>- D2: Up to 1,250sq m |
| 18 | The Island Site | Small | Residential or office led mixed use development with ancillary A1/A3/A4 floorspace at ground floor | Medium to long term | - A1 (convenience): Up to 400sq m<br>- A3: Up to 400sq m |
| 19 | Pooley's Yard | A hotel has been granted planning permission on this site. | | | |

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## 11.2 Capacity to Meet Identified Needs

11.2.1 The quantum of floorspace for each site assessed to be able to be delivered is an estimate only and could vary depending on site circumstances, design and the ability to fully assemble or even expand sites. The floorspaces identified in this study are therefore a guide.

11.2.2 On the basis of the site assessments undertaken, between the nineteen sites, these are estimated to have the potential to deliver up to:

- 10,000sq m gross / 7,000sq m net of comparison goods retail floorspace;
- 3,600sq m gross / 2,520sq m net of convenience goods retail floorspace;
- 6,035sq m gross / 5,130sq m net of additional food and drink floorspace;
- 4-5 health and fitness gym facilities; and
- 6 medium sized hotels / 3 large hotels (or a greater number of smaller sized hotels).

11.2.3 It should be noted that in providing net retail floorspace figures an average gross to net ratio of 70%/30% for A1 retail floorspace and, a 85%/15% for A3 food and drink floorspace has been applied. The gross/net floorspace splits are based on previous work undertaken by Experian in 2005 and WYG judgement based on work for retailers/operators.

11.2.4 Whilst the 19 sites have the capacity to accommodate the identified convenience retail, food and drink, health and fitness, and hotel capacity needs, based on our capacity appraisal, they are not capable of meeting the identified comparison goods retail floorspace needs (between 36,900-67,600sq m net (including 1,900-3,500sq m net capacity at Copdock/Interchange and 200-400sq m net capacity in Martlesham (Ipswich Eastern Fringe))). Collectively the 19 sites are only potentially capable of accommodating circa 19% of the comparison goods floorspace needs in the plan period (taking the identified minimum floorspace capacity need figure).

11.2.5 Given the uncertainties regarding the suitability of possible uses for the potential conversion/ refurbishment of the Town Hall/Post Office (Site 15) it should be noted that we have not included potential floorspace capacity of this site within the above floorspace figures. In the absence of large available retail units within the town centre retail core we consider that priority should be given to the potential re-use of these buildings for retail. However, given the stepped access of both units, we recognise that they may not be suitable for comparison goods retailing.

11.2.6 The 2,000sq m gross convenience goods floorspace potential identified for the Mint Quarter Site is proposed to meet Aldi's outstanding requirement for a foodstore in Ipswich. If Aldi's requirement is met elsewhere, or the owners/developers of the site do not wish to bring forward a foodstore, the site could have more capacity to accommodate additional comparison goods floorspace. If all the potential A1 retail floorspace for the Mint Quarter site is developed for A1 comparison goods floorspace collectively the 19 sites could potentially accommodate circa 23% of the comparison goods floorspace needs in the plan period (taking the identified minimum floorspace capacity need figure).

11.2.7 Our initial site assessment of the Mint Quarter Site (Site 13) has identified that whilst, in planning terms, the site is the most sequentially preferable site to meet large scale comparison goods retail floorspace there is evidence to suggest that in the past it has not been commercially attractive to A1 comparison goods retailer's due to its relationship with the prime shopping streets. Accordingly, significantly improved pedestrian linkage with the primary shopping streets, potentially requiring the use of CPO powers to acquire buildings fronting onto Upper Brook Street (and potentially Carr Street), will be key to attracting retailers and delivering this site. The existing landowners desire to see the site potentially redeveloped will also be instrumental in the sites delivery.

11.2.8 We note that the only other centrally located site that could physically accommodate large scale comparison goods floorspace is the Westgate Site (Site 12). However, the owners of the site are currently marketing it (excluding residential on Black Horse Lane) for residential-led mixed use development with a limited amount of retail (2,047sq m gross), A3 (165sq m gross) and Cultural (365sq gross) uses. The site is now therefore unlikely to be available for large scale retail development. Given the shortage of centrally located sites capable of accommodating the identified comparison goods floorspace needs the potential loss of this site as an opportunity for large scale retail development is unfortunate.

11.2.9 The NPPG (paragraph 6) advises, where it is not possible to accommodate all forecasts needs in a town centre, LPA's should plan positively to identify the most appropriate alternative strategy for meeting the need, having regard to the sequential approach and retail impact tests. Accordingly, should there not be any other sites within Ipswich Town Centre capable of accommodating the identified needs, sites outside the town centre will need to be considered.

## 11.3 Conclusions

11.3.1 Our initial assessment of the availability and suitability of the 19 sites finds that the identified capacity for A1 convenience goods retail, food and drink, health and fitness, and hotel provision could potentially be accommodated within the sites. However, it is estimated that the sites are only potentially capable of accommodating up to 19% of the identified comparison goods retail capacity needs. With the exception of the Mint Quarter site we are not aware of any other centrally located site that could physically accommodate large scale comparison goods floorspace. Should there not be any other sites within Ipswich Town Centre capable of accommodating the identified needs, in accordance with the NPPG, having regard to both the sequential approach and retail impact tests, sites outside the town centre will need to be considered.

11.3.2 It is noted that most of the assessed sites are located within the defined town centre boundary and therefore all town centre uses are acceptable in principle. In the primary shopping frontage zone, the focus should be on A1 uses first. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and the Waterfront area.

11.3.3 Not only is the redevelopment of the Waterfront area itself important to the town centre overall, the key to maximising the relationship, and spin off benefits, between the town centre primary streets and the waterfront is the linkage and uses/layout of the sites between the two (Sites 1, 9, 10 and 11). We consider the sites and the wider 'transition area' should be subject to further master planning work to make sure, if sites are brought forward in isolation, they do not materially harm potential linkage improvements. The potential remodelling of the Star Lane gyratory will be important in facilitating and maximising linked trips.

# 12.0 Ipswich: Key Findings and Policy Recommendations

## 12.1 Summary of Identified Need

12.1.1 The quantitative need findings identified for the Ipswich Borough are summarised in Figure 13.1 below.

**Figure 13.1: Quantitative Capacity Summary – Ipswich Borough (within plan period (2036))**

| Sector | Capacity |
|---|---|
| Comparison Goods (sq m net) | 34,800-63,700 – excluding Copdock/Interchange<br>36,700-67,200 – including Copdock/Interchange |
| Convenience Goods (sq m net) | 1,600-2,100 |
| Restaurant & Café/ Coffee Shop (sq m net) | 4,231 |
| Health & Fitness (No.) | 5-7 gyms |
| Cinema (No.) | Nil |
| Bingo Hall (No.) | Nil - although outstanding requirement from Mecca Bingo to open a new high street online format store (Luda Bingo) of 232-465sq m gross in Ipswich Town Centre |
| Tenpin Bowling (No.) | Nil |
| Hotels (rooms) | 342 |

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

### Comparison Goods

12.1.2 Our study identifies a significant level of comparison goods floorspace capacity for Ipswich Borough in the period up to 2036. Whilst Copdock/Interchange is located within Babergh District Council's administrative area, due to it primarily serving Ipswich Borough residents the identified capacity requirements for the out-of-centre facilities, in accordance with the sequential approach to site selection, should be directed to Ipswich Town Centre first. The redistribution of the identified comparison goods floorspace capacity to Ipswich results in a circa 2,000-3,500sq m net increase in Ipswich Borough's identified capacity requirements. It is important that both Babergh District and Ipswich Borough councils engage with one another to make sure the policy approach for retail capacity at Copdock/Interchange is embedded in policy for both authority areas. A similar approach should also be taken for out-of-centre facilities in the Ipswich Eastern Fringe area, located in Suffolk Coastal district. Whilst the identified comparison goods capacity for Ipswich Eastern Fringe is minimal (200-400sq m net), the redistribution of the retail capacity for the area will need to be clearly set out in relevant policy in both Suffolk Coastal district's and Ipswich Borough's local plans.

12.1.3 Ipswich Town Centre has strengthened its market share of comparison goods expenditure since the 2010 Retail Study and is competing well against surrounding centres and out-of-centre retail facilities. We consider that the Council, in addition to identifying sites/units for new comparison goods floorspace requirements identified by this study, should seek to improve Ipswich Town Centre's comparison goods market share by way of: qualitative improvements including, *inter alia*, improvements to the existing retail stock (to attract a greater number of higher quality retailers); town centre environmental improvements; and implementing a marketing strategy.

12.1.4 The town centre is considered to provide a good variety of national multiple and independent retailers. There is also evidence of retailer/investor confidence and retailer demand in the town centre. However, the centre lacks a high quality department store and its offer of higher brand national multiple comparison retailing is limited but improving.

### Convenience Goods

12.1.5 There is an identified convenience goods quantitative need for between 1,600-2,100sq m net floorspace in the Borough. The study does not identify any capacity for convenience goods capacity at Copdock/Interchange and therefore no capacity redistribution is required.

12.1.6 Again, in considering the identified capacity figures for the Ipswich Eastern Fringe area (within the Suffolk Coastal district) (2,400-3,000sq m net), in accordance with the sequential approach to site selection, capacity should be directed to centres first. The centres not only include Woodbridge and Felixstowe, but also, as the sub-regional centre, Ipswich Town Centre. Convenience goods shopping provision of an appropriate scale should also be considered to be included in any potential new district/local centres in the Ipswich eastern fringe.

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

### Restaurant/Café and Coffee Shop

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

12.1.9 In qualitive terms, whilst, primarily as a result of The Buttermarket Shopping Centre redevelopment, restaurant and café/coffee shop provision in the town centre has significantly improved recently there are a still a number of national food and drink operators not present. The study identifies, given the existing provision, retention levels and outstanding requirements from operators, there is a qualitative need to improve restaurant and café/coffee shop provision in the town centre.

12.1.10 Notwithstanding the above, as previously noted, in the Primary Shopping Frontage Zone the focus should be on A1 uses first. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and also the Waterfront area (which we consider should continue to be the focus of redevelopment for a mix of uses including A3 uses at ground floor level).

### Indoor Sport/Health & Fitness

12.1.11 Whilst there is not considered to be a general qualitative deficiency in existing indoor sport/health and fitness facilities in the borough, and currently no requirements from sports/health and fitness operators, based on the current rates of indoor health and fitness participation, there is assessed to be capacity for between 5-7 new additional facilities in the plan period.

### Cinema

12.1.12 Following the recent opening of the state of the art modern 14 screen Empire Cinema in the Buttermarket Shopping Centre, there is no quantitative or qualitative need for additional cinema provision in Ipswich.

### Bingo Hall

12.1.13 Having regard to the existing two large bingo halls in the borough there is assessed to be no quantitative or qualitative need for an additional facility in the borough in the plan period. There is however an outstanding requirement from Mecca Bingo to open a new high street online format store (Luda Bingo) of 232-465sq m gross in Ipswich Town Centre.

### Tenpin Bowling

12.1.14 The study identifies that existing bowling facilities in the Ipswich urban area meet with existing and projected requirements. Whilst the Namco FunScape bowling alley is the subject to extant planning permission which provides for its change of use for retail purposes and could close, a state of the art Superbowl UK bowling alley in Ipswich Town Centre has recently opened significantly enhancing the qualitative provision of ten pin bowling in Ipswich.

### Arts & Cultural Activities

12.1.15 The study finds, as a major centre, Ipswich sustains a good number of cultural facilities. It identifies that facilities in Ipswich draw from a large area and the town is the most popular destination in the study area. The available evidence identifies that there is no current requirement for new cultural facilities in Ipswich. However, we recommend that in order to maintain and improve current participation rates, and help increase the number of visitors to the venues/area, consideration should be given to ways of further promoting existing facilities and improving marketing.

### Hotels

12.1.16 The study identifies that there is a potential quantitative requirement for some 342 hotel rooms in the borough within the plan period. In the short term, interest would appear to be in providing rooms in the 3* standard and above in the town centre with varying levels of service, but accompanied by a food and drink offer. There is limited capacity for further growth in the budget/super budget market however there is a clear gap in the hostel sector.

12.1.17 Whilst there is a reasonable level of 3* hotels in Ipswich, 4* provision is more limited and there is no 5* provision. There are therefore opportunities for higher quality provision, particularly in the form of small scale boutique style establishments.

12.1.18 The study identifies that hotels with large conference facilities capable of accommodating business meetings, functions (including weddings) and small conferences are limited in the town however the current level of large conference venue facilities is not considered to be untypical for a town the size of Ipswich. A centrally located conference venue with hotel would however be an asset to the town and could also complement the University campus.

## 12.2 Proposed Network of Centres

12.2.1 In drawing up Local Plans, Paragraph 23 of the NPPF requests the LPA to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

12.2.2 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

> *"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.*
>
> *District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.*
>
> *Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.*
>
> *Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."*

12.2.3 The Local Plan identifies Ipswich Town Centre as the highest order centre in the Borough. Underneath Ipswich Town Centre the local plan (Policy DM21) identifies 11 district centres and 34 local centres.

12.2.4 This study identifies that Ipswich Town Centre continues to perform as an important town centre. The town centre provides a sub-regional role serving a wider area than the borough itself. The town centre is competing well against the surrounding main centres with good and improved shopping retention levels. It remains the 3rd strongest centre in the region and whilst ranked behind the larger centres of Norwich and Cambridge, remains higher than Colchester, Chelmsford and Bury St Edmunds. Accordingly, we support the retention of Ipswich Town Centre as a defined town centre. It is important for Ipswich Town Centre to remain a strong major regional centre and for policy to continue to ensure that further potential out-of-centre retail and/or commercial leisure development does not undermine its role in the hierarchy.

12.2.5 In terms of district centres, the 11 centres, which are broadly distributed across the built up area surrounding the town centre are:

- Meredith Road;
- Norwich Road;
- Hawthorn Drive;
- Stoke Park Drive;
- Wherstead Road;
- Cauldwell Hall Road/Woodbridge Road.
- Felixstowe Road;
- Nacton Road;
- Ravenswood;
- Woodbridge Road East/ Heath Road;
- Duke Street; and

12.2.6 Section 6 and Appendix G of the study examines the health and composition of the 11 district centres. The study finds that all the district centres in the Borough are, in part, anchored by a foodstore/convenience store. The majority of centres meet 'day to day' shopping/service needs of their local communities. However, it is apparent that Felixstowe Road, Stoke Park Drive, Meredith Road and Ravenswood district centres, due to their foodstore provision, serve wider catchment areas beyond their immediate residential areas.

12.2.7 Notwithstanding the varying sizes of the district centre, having regard to the definition of a district centre in the former PPS4, we consider that the district centres in the Borough are each performing the role of a district centre and also, importantly, serve a complimentary role to Ipswich Town Centre.

12.2.8 The Local Plan (Policy DM21) identifies that Ipswich Town Centre and the 11 existing district centres in the borough are supported by 34 local centres. The local plan also proposes one new district centre at Sproughton Road and one new district and two local centres in the Ipswich Garden Suburb. The remit of this Study has not included WYG to review the composition to verify the lower order local centres or advise on the requirements for the proposed centres at Sproughton Road or the Ipswich Garden Suburb. We however note that the given the planning permissions for an Aldi store and Care Home, Sproughton Road District Centre is unlikely to be delivered in a form commensurate with the district centre definition outlined in the former PPS4.

## 12.3 Recommended Local Retail Impact Threshold

12.3.1 In accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out-of-centre retail development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF. The NPPF sets a default retail impact threshold of 2,500sq m gross. The NPPG explains that gross retail floorspace is defined as *"the total built floor area measured externally which is occupied exclusively by a retailer or retailers, excluding open areas uses for the storage, display or sale of goods"* (paragraph 16).

12.3.2 Policy DM23 of the Ipswich Local Plan (February 2017) sets a borough wide blanket local retail impact assessment threshold of 200sq m net. We note the set threshold also relates to development requirements to undertake a sequential approach to site selection. The NPPF does not advocate a floorspace threshold for sequential approach assessment requirements. We would therefore recommend the policy is re-worded so it is clear that a sequential approach assessment is required for any sized retail proposals in edge-of-centre or out-of-centre locations.

12.3.3 We also note that the set threshold is identified as net floorspace rather than gross. Whilst not consistent with the NPPF's unit threshold figure (gross) we do not raise any particular objection to the use of net floorspace should the Council wish to continue to identify a threshold in this way.

12.3.4 The NPPF considers the following aspects important in setting a locally appropriate threshold:

- Scale of proposals relative to town centres;
- The existing viability and vitality of town centres;
- Cumulative effects of recent developments;
- Whether local town centres are vulnerable;
- Likely effects of development on any town centre strategy; and
- Impact on any other planned investment.

12.3.5 WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. For example, a convenience store with a net sales area of 250sq m (which could be operated by Tesco Express or Sainsbury's Local) will likely have a greater impact on a district centre in the borough than on Ipswich Town Centre itself.

12.3.6 Accordingly, we recommend that policy should advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of a particular centre.

12.3.7 In our experience, it will only generally be development of a scale greater that these impact thresholds which could lead to a 'significant adverse' impact and merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF. In setting the thresholds, we have, *inter alia*, had regard to the trading model of the smaller convenience goods store format operated by the likes of Co-Op, Sainsbury's and Tesco. Such stores generally have net sales areas slightly below the 280sq m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400sq m. Whilst of a relatively moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to retain control in respect of the considerations of impacts arising from the implementation of such proposals.

12.3.8 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

12.3.9 Turning firstly to Ipswich Town Centre, the study finds that the town centre is competing well against the surrounding main centres and displays reasonably good levels of vitality and viability. It also identifies that current shopping and leisure retention levels are good and have improved over the last 10 years. The town centres resilience to withstand potential impact from out-of-centre retail development has recently (November 2016) been examined by a Planning Inspector in relation to a planning appeal for the change of use of Namco Funscape (D1), Boss Hall Road, to A1 retail. In allowing the appeal for 2,000sq m net out-of-centre open A1 comparison goods floorspace the Inspector concluded that Ipswich Town Centre would not be significantly harmed. The current health and strength of Ipswich Town Centre and the recent Inspector's conclusions would therefore suggest that a relatively high retail impact threshold could potentially be adopted. However, having regard to:

- the potential cumulative effects of recent out-of-centre planning permissions (particularly following the grant of planning permission for 2,000sq m net Open A1 retail floorspace at Namco Funscape, Boss Hall Road);
- increasing competition from the internet;
- the importance of seeking to bring forward investment on potential development sites in the town centre (in order for the town centre to continue to compete effectively against other town centres and existing out-of-centre development); and
- the lack of available units in the prime shopping area capable of meeting national multiple occupiers (and in turn the potential for retailer/leisure operators to instead locate outside the town centre);

we recommend that a reasonably conservative threshold of 750sq m gross (525sq m net (adopting 70/30% gross/net floorspace split)) should be considered by the Council. This will provide the Council with sufficient flexibility to assess the merits and potential impact implications of edge and out-of-centre retail applications.

12.3.10 In terms of the district centres within the Borough we recommend, having regard to our assessments of the centres, existing provision and their role in the retail hierarchy, that the Councils existing 200sq m net (280sq m gross (70%/30% gross/net floorspace split)) threshold is maintained. Accordingly, proposals providing greater than 280sq m gross floorspace in an edge or out-of-centre location proximate to the district centres should be the subject of an impact assessment. In our professional opinion, such developments could draw trade from the centres that may have a significant adverse impact and it would be appropriate to be able to assess such impact to make sure the vitality and viability of the relevant district centre is retained.

12.3.11 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

12.3.12 Given that we have not explicitly reviewed the composition of local centres in the borough we have not been able to provide advice on an appropriate threshold policy for these centres.

## 12.4 Site Assessments

12.4.1 The initial site assessment undertaken in this study identifies that there would appear to be sufficient sites within Ipswich Town Centre capable of accommodating the identified capacity for A1 convenience goods retail, food and drink, health and fitness, and hotel provision can be accommodated within the 19 sites.

12.4.2 In terms of the identified comparison goods floorspace capacity (between 36,700-67,200sq m net (including capacity at Copdock/Interchange)) it is estimated that the 19 sites assessed are only potentially capable of accommodating upto 19% of the identified comparison goods retail capacity needs.

12.4.3 Out of the 19 sites assessed the Mint Quarter site (Site 13) is the only centrally located site capable of accommodating large scale comparison goods retail capacity. We note that the only other centrally located site that could physically accommodate a good level of comparison goods floorspace is the Westgate Site (Site 12). However, the owners of the site are currently marketing it (excluding residential on Black Horse Lane) for residential-led mixed use development with a limited amount of retail (2,047sq m gross), A3 (165sq m gross) and Cultural (365sq gross) uses. The site is therefore now unlikely to be available for large scale retail development.

12.4.4 The NPPF (paragraph 23) sets out that in drawing up Local Plans local planning authorities should allocate a range of suitable site to meet, *inter alia*, retail development needed in town centres and that identified needs are met it full and are not compromised by limited site availability. The NPPG (paragraph 6) advises, where it is not possible to accommodate all forecasts needs in a town centre, LPA's should plan positively to identify the most appropriate alternative strategy for meeting the need, having regard to the sequential approach and retail impact tests. Accordingly, should there not be any other sites within Ipswich Town Centre capable of accommodating the identified needs, sites outside the town centre will need to be considered by the Council.

12.4.5 The Waterfront is clearly an important asset for Ipswich Town Centre with the sites in the waterfront area capable of accommodating a large proportion of the identified needs. Improving the linkage between the town centre primary shopping streets and the Waterfront is vital so the two complement and work with one another. The potential uses/layout of the sites between the town centre shopping street and the Waterfront need to enhance the linkages with, where possible active frontages. We consider the sites and the wider 'transition area' should be subject to further master planning work to make sure, if sites are brought forward in isolation, they do not materially harm the potential linkage improvements.

## 12.5 Review of Ipswich Town Centre Boundary, Central Shopping Area and Shopping Frontage Zones

12.5.1 The NPPF (Chapter 2) aims to boost the vitality of city, town, district and local centres. Paragraph 23 of the NPPF states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In doing this, Local Planning Authorities should:

> *"Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontage in designated centres, and set policies that make clear which uses will be permitted in such locations"*

12.5.2 Frontage designations are the most important mechanism for ensuring retail and commercial leisure uses (particularly A1 uses) are both maintained and allowed maximum opportunity to develop within the town centre. The NPPF does not specify acceptable proportions of retail and non-retail in these frontages, as it is a matter for Local Planning Authorities to decide. The frontage designations should promote the vitality and viability of town centres and provide high quality and accessible retail services.

12.5.3 The NPPF 'Annex 2' identifies that:

> *"Primary frontages are likely to include a high proportion of retail uses which may include food, drink, retail and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses".*

12.5.4 Annex 2 also defines town centres as an area including the primary shopping area and areas predominately occupied by main town centre uses within or adjacent to the primary shopping area.

12.5.5 As part of this retail and commercial leisure evidence study, and in line with the brief, WYG has reviewed Ipswich Town Centre's existing centre boundary and shopping frontages. Our recommendations are informed by our vitality and viability health check and detailed analysis of the town centre.

12.5.6 Ipswich's current defined town centre and shopping frontages are identified on the Policies Map of the recently adopted Ipswich Local Plan (February 2017). It identifies the following:

- a Town Centre Boundary;
- a Central Shopping Area (CSA);
- a Primary Shopping Frontage Zone (PSFZ);
- a Secondary Shopping Frontage Zone (SSFZ); and
- a Specialist Shopping Frontage Zone (SPFZ).

12.5.7 The plan identifies that the PSFZ and SSFZ constitute the Primary Shopping Area (PSA) and the CSA comprises the PSFZ, SSFZ and SPFZ.

12.5.8 Whilst the NPPF does not specifically advocate primary and secondary frontage to be zoned in local plans given that there are shopping centres in the town centre with frontages at multiple levels that can't easily be shown on Local Plan proposals map we consider defining frontage zones rather than frontages to be acceptable in this instance. We note the Inspector in examining the Local Plan did not raise any objection to the use of frontage zones. Indeed, he recommended (paragraph 90 of the Inspectors Report on the Local Plan) that the Council retitle their proposed primary, secondary and specialist areas in this manner.

12.5.9 As part of this retail and commercial leisure evidence study, and in line with the brief, WYG has carefully reviewed the existing boundaries and frontage zones for Ipswich Town Centre. Our recommendations are informed by our vitality and viability health check and detailed analysis of Ipswich Town Centre.

12.5.10 Our recommended boundaries and frontage zones largely corresponds with those defined in the adopted Local Plan. Figure 12.2 below summarises our recommendations and relevant plans showing recommended amendments to the Town Centre boundary, CSA, PSFZ, SSFZ, and SPFZ are included at **Appendix V** of this study. The Ipswich Town Centre Inset Policies Map from the IP-One Area Action Plan showing the existing boundaries and shopping frontage zones is also attached at **Appendix V**.

**Figure 12.2: Recommended Boundaries & Frontages**

| Boundary/ Frontage | Comments/Recommendations |
|---|---|
| Town Centre Boundary | • Curtail to the east to exclude land to the east of The Regent Theatre Car Park and Bond Street (primarily residential area). This area includes Grimwade Street and Woodbridge Road local centres.<br>• It is noted that the town centre boundary covers a large area extending to the west beyond Civic Drive, Franciscan Way and Grey Friars Road (including Cardinal Park to Portmans Walk/W End Road junction). We broadly support the current extent of the boundary. However, the Council need to be aware that, with the exception of A1 use, all other main town centre uses are acceptable in principle within the town centre boundary. This could have a potential negative impact in terms of seeking to prioritise such uses (eg food and drink) to the more central parts of the town centre (albeit prioritising A1 uses in the PSFZ) and the Waterfront area. |
| Central Shopping Area | • Given that the PSFZ, SSFZ, and SPFZ constitute the Central Shopping Area please refer to our comments/recommendations for these frontages below. |
| Primary Shopping Area | • Given that the PSFZ and SSFZ constitute the Primary Shopping Area please refer to our comments/recommendations for these frontages below. |
| Primary Shopping Frontage Zone | • Extend to include western and eastern end of Buttermarket (currently identified as SSFZ)<br>• Extend to include western side of Upper Brook Street (currently identified as SSFZ)<br>• Extend to include the Town Hall and Lloyds building on Corn Hill (subject to potential for conversion to A1 retail) (currently identified as SSFZ) |
| Secondary Shopping Frontage Zone | • Extend to include Mecca Bingo on Lloyds Avenue (currently identified as SPFZ)<br>• Extend to include Upper end of Princes Street (from its junction with Museum Street to Buttermarket).<br>• Extend to include Northgate Street and Great Colman Street (currently identified as SPFZ)<br>• Retention of Westgate site in SSFZ (and thus PSA and CSA) supported.<br>• Retention of the western part of the Mint Quarter site in SSFZ (and thus PSA and CSA) (subject to further site assessment work)<br>• Remove the Town Hall and Lloyds building on Corn Hill (subject to potential for conversion to A1 retail) (identified as PSFZ)<br>• Remove western and eastern end of Buttermarket (identified as PSFZ))<br>• Remove western side of Upper Brook Street (identified as PSFZ) |
| Specialist Shopping Frontage Zone | • Extend to include middle part of Upper Orwell Street.<br>• Remove Mecca Bingo on Lloyds Avenue (identified as SSFZ).<br>• Remove Northgate Street and Great Colman Street (identified as SSFZ) |

## 12.6 Recommendations in Respect of the Council's Future Retail and Commercial Leisure Strategy

12.6.1 The study identifies that the majority of surrounding large main town centres outside the borough either have aspirations/allocations/new development for retail/leisure development or have planning permission for retail/leisure development in the town centre. It is therefore important that Ipswich Town Centre does not stand still if it is to continue to compete effectively against other town centres. Otherwise, planned improvements in other centres could potentially materially impact upon the future performance and overall vitality and viability of Ipswich Town Centre.

12.6.2 Our detailed qualitative assessment of Ipswich Town Centre identifies that, despite the significant level of out-of-centre retail and leisure floorspace and recent retail and leisure trends (including further growth in internet and polarisation of retailing), the town centre is performing well and is considered to display reasonably good levels of vitality and viability. The town centre has largely been unaffected by the polarisation of retailing indeed a number of retailers and leisure operators, including Next, are seeking to open premises in the town centre.

12.6.3 The key issue facing the town centre is the current lack of available units/sites in the primary shopping streets able to meet with current and potential future requirements/demands (particularly retail). With the exception of the Mint Quarter site we are not aware of any other centrally located site that could physically accommodate a good level of comparison goods floorspace. Should there not be any other sites within Ipswich Town Centre capable of accommodating the identified needs, in accordance with the NPPG, having regard to both the sequential approach and retail impact tests, sites outside the town centre will need to be considered.

12.6.4 Ipswich draws retail and commercial leisure expenditure from a wide catchment including those residents residing in the Suffolk Coastal district area, Babergh Mid Suffolk Council areas and in the Essex, Tendring and Colchester council areas. The level of expenditure drawn from the wider area is to be expected given the sub-regional role and catchment of the town centre. The study identifies that overall Ipswich Town Centre and town centres in the Suffolk coastal district provide a complimentary role and the level of retail and leisure retention rates are appropriate given their respective size and roles.

12.6.5 The town centre strategy for Ipswich needs to be able to support the continued development/changes in the 'high street' if it is to successfully compete. As set out in Section 3 of this study the key purpose of the town centre strategies should be to seek to extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre.

12.6.6 The recommended key elements to the town centre strategy, as a result of the findings of this study, are set out below:

- Review unit opportunities in the town centre primary shopping area for retail use which should include an assessment of whether it would be possible to amalgamate existing units/ accommodation.
- Follow up, where necessary, the initial site assessment work undertaken as part of this Study with detailed site assessments, involving land owners and other consultees, to obtain a full understanding of their availability and suitability to meet the retail and commercial needs identified in this study.
- Given the apparent limited site opportunities for large scale retail development close to the primary shopping streets promote the Mint Quarter site for retail-led mixed-use development.

- Identify sufficient centrally located sites in the town centre to positively harness the economic benefits of the hotel sector, ensuring the supply of hotel bed spaces support the continued drive for growth and the vitality of the town centre.
- Continue to engage with landowners and interested parties in seeking to bring forward potential development sites which help enhance/improve the linkages between the primary shopping streets in the town centre and the Waterfront. The potential remodelling of the Star Lane/College Street, which acts a physical barrier, will be important to the 'master planning' of this area.
- Proactively engage with: (1) the various retailer, leisure and hotel operators who currently have outstanding requirements to open new premises in Ipswich Town Centre; and (2) owners of available vacant properties in the town centre (including the former BHS unit and former Odeon cinema).
- Maintain, and where possible strengthen, the town centre's independent/specialist retail/service offer.
- Prioritise A1 uses in the Primary Shopping Frontage Zone. A3 uses should be prioritised in appropriate and available units within the remainder of the town centre boundary, including secondary and specialist shopping areas and the Waterfront area.
- Continue to focus on the redevelopment of the Waterfront for a mix of uses including food and drink at ground floor level.
- Undertake a town centre public realm improvement study to seek to address those areas of the town centre that would benefit from new higher quality paving, street furniture and soft landscaping.
- Undertake a Parking Strategy for Ipswich Town Centre to assess whether the provision of car parks in the town meets with current and future demand [currently being undertaken].
- Undertake an assessment of the town centre market to understand its use and role and whether there are potential opportunities to improve its retail offer.
- Develop a marketing strategy to seek to improve the perception of the town centre and help increase the number of higher brand retailers and the number of visitors to the venues/town centre. The marketing strategy should provide an assessment to understand potential options for further promoting existing facilities and improving marketing.

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

12.6.8 With active key stakeholders (Ipswich Central Business Improvement District, Ipswich Vision, Ipswich Destination Management Organisation, and New Anglia Enterprise Partnership) in place Ipswich Town Centre is in a much better place to be able to continue to attract/deliver investment and encourage more visitors to the town centre. It is important that the Council continues to work with its partners and relevant landowners to deliver development opportunities in the town centre to meet the identified retail and commercial leisure needs.

# 13.0 Suffolk Coastal District: Key Findings and Policy Recommendations

## 13.1 Summary of Identified Need & Recommendations in Respect of the Council's Future Retail and Commercial Leisure Strategy

13.1.1 The quantitative need findings identified for Suffolk Coastal district are summarised in Figure 13.1 below.

**Figure 13.1: Quantitative Capacity Summary – Suffolk Coastal District (within plan period (2036))**

| Sector | Woodbridge | Felixstowe | Saxmundham | Aldeburgh | Framlingham | Leiston | Ipswich Eastern Fringe |
|---|---|---|---|---|---|---|---|
| Convenience Goods (sq m net) | 400 | Nil | 800-1,000 | Nil | 400 - 500 | 100 | 2,400-3,000 |
| Comparison Goods (sq m net) | 3,500-5,800 | 2,000-3,400 | 700-1,200 | 300-500 | 500-900 | 500-900 | 200-400 |
| Restaurant & Café/ Coffee Shop (sq m net) | 1,000 | 600 | 200 | 170 | 130 | 50 | - |
| Health & Fitness (No.) | 5-7 gyms (within Suffolk Coastal district) | | | | | | |
| Cinema (No.) | 1-2 screens (within Suffolk Coastal District) | | | | | | |
| Bingo (No.) | Nil | | | | | | |
| Tenpin Bowling (No.) | Nil | | | | | | |
| Hotels (rooms) | 268 (within Suffolk Coastal district) | | | | | | |

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

13.1.2 Our study identifies that Woodbridge and Felixstowe have the most identified comparison goods and restaurant & café/coffee shop capacity over the plan period and should be the main focus for future comparison goods shopping and restaurant and café/coffee shop provision.

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

13.1.4 The retail capacity identified for Ipswich Eastern Fringe area, in accordance with the sequential approach to site selection, should be directed to centres first. The centres not only include Woodbridge and Felixstowe, but also, as the sub-regional centre, Ipswich Town Centre. Convenience goods shopping provision of an appropriate scale should also be considered to be included in any potential new district/local centres in the Ipswich eastern fringe. The redistribution of the retail capacity for the Ipswich Eastern Fringe area will need to be clearly set out in relevant policy in both Suffolk Coastal district's and Ipswich Borough's local plans.

13.1.5 Whilst there is not considered to be a general qualitative deficiency in existing indoor sport/health and fitness facilities in the district, and currently no requirements from sports/health and fitness operators, based on the current rates of indoor health and fitness participation, there is assessed to be capacity for between 5-7 new additional facilities in the plan period. Having regard to existing market share patterns it is recommended that the council should consider additional provision in central locations in the towns of Woodbridge and Felixstowe and also in the Ipswich Eastern Fringe area.

13.1.6 In terms of the identified cinema needs for the district we consider that there is no requirement for qualitative improvements in cinema provision in the district. Existing cinema provision in the district, together with cinema provision in Ipswich (including the recently opened Empire Cinema), provides sufficient provision for the district population. Accordingly, we do not consider it necessary for the Council to plan for further cinema provision in the district within the plan period.

13.1.7 Turning to Bingo hall needs, whilst the district only has one bingo facility (The Palace, Felixstowe), we do not consider it likely that there will be a requirement for an additional facility in the district within the plan period.

13.1.8 For Tenpin bowling, the study identifies that existing bowling facilities in the two administrative areas, which provide a total of 44 lanes, meet with existing and projected requirements. Furthermore, the new state of the art Superbowl UK bowling alley in Ipswich Town Centre, which will, in part, serve residents in the Suffolk Coastal district will significantly enhance the qualitative provision of ten pin bowling in the area.

13.1.9 In terms of arts and cultural activities (theatres and museum/art facilities), the study identifies that existing provision of the district towns is of a scale which is appropriate to their role in the hierarchy. Additional provision is likely to reflect particular opportunities related to distinct locations and the existing cultural tourism offer. Forecast demand / need for additional provision is focused on the more comprehensive cultural facilities in the sub-regional town of Ipswich.

13.1.10 The study identifies that there is a potential quantitative requirement for some 268 hotel rooms in the district within the plan period. This growth, in the first instance, should be directed to the larger centres of Woodbridge and Felixstowe. Whilst the district provides a good number of 3* and 4* hotels the number of budget hotels is currently limited. Given the identified quantitative capacity, existing budget hotel provision in the district, and the outstanding requirements from budget hotel operators in Woodbridge and Felixstowe, we consider the Council should seek to identify sites for a budget hotel in both Woodbridge and Felixstowe. Furthermore, given the limited number of leisure/spa resorts there could be potential growth in Leisure/Spa resort 5* provision hotel. However, we are not aware of any immediate requirement or developer interest for such a facility. We recommend that should any proposals for a leisure/spa resort hotel be forthcoming, they are judged on their own merit in accordance with relevant town centre planning policy.

13.1.11 Our detailed qualitative vitality and viability assessment of the town centres in the district identify that all are performing well and display health levels of vitality and viability. The centres are healthy despite the polarisation of retailing, growth in internet and multichannel retailing, and continued pressure from out-of-centre facilities.

13.1.12 The study finds that the centres in the district provide a complimentary role to the larger sub-regional centre of Ipswich and for their size and role generally have healthy retention levels in both retail and leisure spend. Whilst Ipswich draws retail and commercial leisure expenditure from residents residing in the Suffolk Coastal district area this is to be expected given the sub-regional role and catchment of the town centre. Given the size, role and provision of facilities in the towns in the district area, retention levels in the Suffolk Coastal district town centres are not a cause for concern. Accordingly, we do not consider it necessary to plan for improvements in market shares of any of the town centres in the district.

13.1.13 Town centre strategies in the district council area need to be able to support the continued development/changes in the 'high street' if they are to successfully compete. As set out in Section 3 of this study the key purpose of the town centre strategies should be to seek to extend the 'dwell time' and spend of visitors/residents visiting the town centre and in turn the vitality and viability of the centre. The recommended key elements to each town centre strategy, as a result of the findings of this study, are set out below:

**Woodbridge Town Centre**

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

- Strengthen the existing pedestrian linkages between the town centre and waterfront.

Addressing these requirements will in part be impacted on the limited number of town centre units/sites. Whilst the town centre benefits from a low vacancy rate and is of historic design this doesn't assist in being able to meet capacity and operator requirements.

**Felixstowe Town Centre**

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

**Saxmundham Town Centre**

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

**Aldeburgh Town Centre**

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

- Undertake a car parking review to establish car parking requirements and investigate potential options for car park and traffic circulation improvements.

**Framlingham Town Centre**

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

**Leiston Town Centre**

- Promote the delivery of the potential mixed use development of land at High Street (identified in the Leiston Neighbourhood Development Plan).
- Undertake annual monitoring composition checks of the centre to monitor the number and type of units (in particular the number of charity shops).
- Consider whether there are potential future opportunities to assist in increasing the number of clothing and footwear outlets in the town centre.
- Undertake an assessment to consider potential opportunities to improve the overall environmental quality of the centre including whether through traffic could be reduced and narrow pavements widened.

13.1.14 In addition to the above, the Council, in partnership with its stakeholders, should continue to promote the town centres within the district (particularly through the internet) as places to shop, play, work and stay.

## 13.2 Proposed Network of Centres

13.2.1 In drawing up Local Plans, Paragraph 23 of the NPPF requests the LPA to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

13.2.2 Policy SP9 of the Core Strategy and Development Management Policies DPD identifies Felixstowe, Woodbridge, Saxmundham, Aldeburgh, Framlingham and Leiston as 'town centres'. Underneath this the policy identifies a number of 'district centres'.

13.2.3 In the absence of any definition to rely on in the NPPF and the NPPG, the definition of different tiers of the hierarchy provided by the now superseded Planning Policy Statement 4 (PPS4) remains of some relevance. In respect of the definition of town centres, district centres and local centres, PPS4 states the following:

> *"Town centres will usually be the second level of centres after city centres and, in many cases, they will be the principal centre or centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability. In London the 'major' and many of the 'district' centres identified in the Mayor's Spatial Development Strategy typically perform the role of town centres.*
>
> *District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library.*
>
> *Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre.*
>
> *Small parades of shops of purely neighbourhood significance are not regarded as centres for the purposes of this policy statement."*

13.2.4 Experian defines the multi-functional offer of a city or town as including residential, public service, leisure and entertainment, commercial and cultural facilities (amongst others) and Appendix 2 of the NPPF defines 'main town centre uses' as:

> *"Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities)."*

13.2.5 In accordance with the findings of this Study, the role and functions of the centres, and in light of these definitions, we recommend that the Council retain Felixstowe, Woodbridge, Saxmundham, Aldeburgh, Leiston and Framlingham as town centres.

13.2.6 Policy SP9 identifies that the six town centres in the district are supported by seven district centres. The remit of this Study has not included WYG to review the composition to verify these lower order centres.

## 13.3 Recommended Local Retail Impact Threshold

13.3.1 As identified in Section 12, in accordance with national planning policy, it is appropriate to identify locally set thresholds for the scale of edge-of-centre and out-of-centre retail development which should be subject to the assessment of the impact criteria set out by paragraph 26 of the NPPF.

13.3.2 We note that the Council does not currently have an adopted and emerging local set threshold

13.3.3 The NPPF considers the following aspects important in setting a locally appropriate threshold:

- Scale of proposals relative to town centres
- The existing viability and vitality of town centres
- Cumulative effects of recent developments
- Whether local town centres are vulnerable
- Likely effects of development on any town centre strategy
- Impact on any other planned investment

13.3.4 For the reasons already set out in Section 12, WYG does not consider that a blanket threshold is suitable for all types of centre across an administrative area. Policy should advocate a tiered approach whereby the threshold applied to planning applications at edge-of-centre and out-of-centre locations varies in relation to the role and function of a particular centre. In our experience, it will only generally be development of a scale greater that these impact thresholds which could lead to a 'significant adverse' impact and merit the refusal of an application for town centre uses in accordance with the provisions of paragraph 27 of the NPPF. In setting the thresholds, we have had regard to the trading model of the smaller convenience goods store format operated by the likes of Co-Op, Sainsbury's and Tesco. Such stores generally have net sales areas slightly below the 280sq m net sales area limit for extended Sunday trading and generally have a gross floorspace approaching 400sq m. Whilst of a relatively moderate size, these convenience stores often have a relatively substantial turnover and it is considered necessary for the local planning authority to retain control in respect of the considerations of impacts arising from the implementation of such proposals.

13.3.5 The thresholds should not only apply to new floorspace, but also to changes of use and variations of condition to remove or amend restrictions on how units operate in practice.

13.3.6 Both Felixstowe and Woodbridge provide a range of stores which help to draw shoppers to each of the town centres. Having regard to the size of the anchor stores, number of retail units, overall retail floorspace, and the vitality and viability of each centre, we recommend that any proposals providing greater than 750sq m gross floorspace in an edge or out-of-centre location proximate to Felixstowe and Woodbride town centres should be the subject of an impact assessment. Such developments could draw trade from the centres that may have a significant adverse impact and it would be appropriate to be able to assess such impact to make sure the vitality and viability of both town centres are retained.

13.3.7 Figure 13.2 below also provides our recommended thresholds for the smaller market town centres in the district. Given that the centres are all relatively small in size we consider that a lower threshold of 350sq m is required to ensure that the vitality and viability of the centres would not be significantly impacted upon. The centres are broadly similar in size and, with the exception of one/two anchor stores are characterised by small retail units. Whilst Saxmundham, Leiston and Framlingham have large anchor foodstores the other units are all small in size and could be vulnerable to relatively low impacts.

**Figure 13.2: Threshold Analysis for Defined Town Centres**

| Centre | Total No. of Retail Units | Total Retail Floorspace (sq m gross) | Anchor Stores and sizes (sq m gross) | Recommended Threshold (sq m gross) |
|---|---|---|---|---|
| Woodbridge | 109 | 19,100 | Co-op (980sq m)<br>Boots (470sq m) | 750 |
| Felixstowe | 112 | 24,710 | Co-op (3,760sq m)<br>Marks & Spencer (838sq m)<br>Iceland (838sq m)<br>Tesco Metro (948sq m)<br>Boots (690sq m)<br>Argos (380sq m) | 750 |
| Saxmundham | 29 | 6,550 | Waitrose (2,348sq m)<br>Tesco (2,375sq m) | 350 |
| Aldeburgh | 43 | 6,870 | Co-op (416sq m) | 350 |
| Framlingham | 32 | 4,480 | Co-op (1,870sq m) | 350 |
| Leiston | 55 | 5,210 | Co-op (3,600sq m) | 350 |

*Notes: Retail Floorspace/Units = convenience and comparison goods only*

13.3.8 It is important to stress that whilst the locally set threshold would require the submission of an impact assessment for all edge-of-centre and out-of-centre developments exceeding the thresholds, national guidance states that the impact test should be undertaken in a proportionate and locally appropriate way, commensurate to the scale of development proposed. The level of detail would typically be agreed with planning officers during the pre-application process in order to avoid overly onerous requirements that may otherwise restrict and delay development opportunities from coming forward.

13.3.9 Given that we have not explicitly reviewed the composition of district centres in the district we have not been able to provide advice on an appropriate threshold policy for these lower order centres which reflect their convenience or comparison goods function.

## 13.4 Review of Town Centre Boundaries and Primary and Secondary Shopping Frontages

13.4.1 As noted in Section 12, The NPPF (Chapter 2) aims to boost the vitality of city, town, district and local centres. Paragraph 23 of the NPPF states that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In doing this, Local Planning Authorities should:

> *"Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontage in designated centres, and set policies that make clear which uses will be permitted in such locations"*

13.4.2 Frontage designations are the most important mechanism for ensuring retail and commercial leisure uses (particularly A1 uses) are both maintained and allowed maximum opportunity to develop within the town centre. The NPPF does not specify acceptable proportions of retail and non-retail in these frontages, as it is a matter for Local Planning Authorities to decide.

13.4.3 The frontage designations should promote the vitality and viability of town centres and provide high quality and accessible retail services.

13.4.4 The NPPF 'Annex 2' identifies that:

> *"Primary frontages are likely to include a high proportion of retail uses which may include food, drink, retail and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses".*

13.4.5 Annex 2 also defines town centres as an area including the primary shopping area and areas predominately occupied by main town centre uses within or adjacent to the primary shopping area.

13.4.6 As part of this retail and commercial leisure evidence study, and in line with the brief, WYG has carefully reviewed existing defined town centre boundaries, primary shopping areas, and primary and secondary shopping frontages for the six town centres in the district. Our recommendations are informed by our vitality and viability health checks and detailed analysis of each centre.

13.4.7 Figure 13.3 below summarises our recommendations and relevant plans showing recommended amendments, are included at **Appendix W** of this study.

**Figure 13.3: Recommended Boundaries & Frontages**

| Town | Latest Adopted Boundaries & Frontages | Comments/Recommendations |
|---|---|---|
| Woodbridge | Suffolk Coastal Local Plan (2001) | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No PSA defined in 2001 Local Plan. Recommended PSA extends to St Johns Street to the east, northern part of Quay Street, eastern part of Cumberland Street and includes Mark Hill to the north.<br>- Primary Shopping Frontage - PSF (identified as Prime Shopping Area in 2001 Local Plan) extended to the north on Thoroughfare and also includes Costa Coffee and Laura Ashley on the Thoroughfare.<br>- Secondary Shopping Frontage - No SSF defined in 2001 Local Plan. Recommended SSF shown on plan at Appendix V. Includes Market Hill, northern end of Thoroughfare, part of New Street, Cumberland Street and Quay Street. |
| Felixstowe | Felixstowe Peninsula AAP (January 2017) | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - extension to include retail and commercial units on Orwell Road.<br>- Primary Shopping Frontage - minor extension to the north to include Great Eastern Square.<br>- Secondary Shopping Frontage - extension to include retail and commercial units on Orwell Road. |
| Saxmundham | Site Allocations & Area Specific Policies DPD (January 2017) | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No changes required.<br>- Primary Shopping Frontage - Extension to include Market Place.<br>- Secondary Shopping Frontage - Inclusion of Waitrose and exclusion of Market Place, and minor corrections on Church Street. |
| Aldeburgh | Site Allocations & Area Specific Policies DPD (January 2017) | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - Curtailed to the north to extend only as far as The Aldeburgh Sweet Shop (75 High Street). Properties beyond on predominantly residential.<br>- Primary Shopping Frontage - Extended to include 100-124 High Street (currently shown as SSF).<br>- Secondary Shopping Frontage - Extended to include retail/commercial properties on west side of the High Street (from Town Steps to 75 High Street). |
| Framlingham | Framlingham Neighbourhood Plan (March 2017) | - Town Centre Boundary - No changes required.<br>- Primary Shopping Area - No PSA defined in Neighbourhood Plan. Recommended PSA extends to the western part of Church Street and Well Close Square to the west. Include Market Hill, Bridge Street and Riverside<br>- Primary Shopping Frontage - No PSF defined in Neighbourhood Plan. Recommended PSF includes Market Hill, The Old Mews and includes the Co-op.<br>- Secondary Shopping Frontage - No SSF defined in Neighbourhood Plan. Recommended SSF predominately to the west of the Co-op store and also includes 3-6 Church Street. |

| Town | Latest Adopted Boundaries & Frontages | Comments/Recommendations |
|---|---|---|
| Leiston | Leiston Neighbourhood Plan (March 2017) | - Town Centre Boundary - No changes required. Correctly includes mixed use allocation land at High Street (Policy TC2).<br>- Primary Shopping Area - No PSA defined in Neighbourhood Plan. Recommended PSA extends to 46A Sizewell Road to the east, 104 High Street to the south, 19 Main Street to the north, and the very eastern part of Cross Street.<br>- Primary Shopping Frontage - No PSF defined in Neighbourhood Plan. Recommended PSF includes the Co-op and western part of Sizewell Road and the units on High Street as far as 10-12 High Street to the north and 70 High Street to the south.<br>- Secondary Shopping Frontage - No SSF defined in Neighbourhood Plan. Recommended SSF includes properties at the northern part of the High Street and in the vicinity of the High Street car park to the south. |

*Notes: Plans showing recommended changes attached at Appendix W.*
*PSA = Primary Shopping Area / PSF = Primary Shopping Frontage / SSF = Secondary Shopping Frontage*

13.4.8 In the context of the identified retail and commercial leisure requirements we consider that all of the units in the district's primary shopping area currently in retail use should, in the first instance, be retained for such use. However, in light of the identified need for Felixstowe and Woodbridge, following an investigation of potential suitable and available site, a further review of the primary shopping areas and town centre boundaries may be necessary.

## Glossary of Terms

| | |
|---|---|
| **Capacity** | Retail capacity in terms of this report refers to surplus/deficit of expenditure (£m) which represents the difference between the expenditure and turnover of the identified facilities. |
| **Comparison Goods** | Comparison goods relate to items not obtained on a frequent basis, these include clothing, footwear, household and recreational goods. |
| **Convenience Goods** | Convenience goods relate to everyday essential items including confectionary, food, drinks, newspapers and magazines. |
| **District Centre** | District centres will usually comprise groups of shops often containing at least one supermarket or superstore, and a range of non-retail services, such as banks, building societies and restaurants, as well as local public facilities such as a library. |
| **Expenditure Per Capita** | The average spend of each person within the defined Study Area on a variety of retail goods. |
| **Expenditure** | Expenditure is calculated by taking the population within a defined area and then multiplying this figure by average annual expenditure levels for various forms of goods. |
| **Expenditure Forecasts** | This assessment has been undertaken using the 'goods based' approach as prescribed in the Planning for Town Centres Practice Guidance. Retail expenditure forecasts have been derived from Experian Retail Planner Briefing Note 14 (November 2016). |
| **Experian (MMG3)** | The database used to identify population, expenditure and socio-economic breakdown of the Study Area population. |
| **Gross Floorspace** | Represents the level of total floorspace or footprint of a specific development (i.e. sales area, storage, checkouts, café, display, and so on). |
| **GOAD Plans** | Provide accurate information on the composition of town centres, shopping areas, out-of-town retail parks and outlet villages in the UK. Identifies the fascia name, retail category, floorspace, and exact location of all retail outlets and vacant premises. |
| **GOAD Reports** | Provide a snap-shot of the retail status or demographic make-up of Goad surveyed town centres. Provides a comprehensive breakdown of floorspace and outlet count for all individual trade types in the Convenience, Comparison, Retail Service, Leisure, Financial/Business Services and Vacancy sectors. |

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| **Local Centre** | Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette. In rural areas, large villages may perform the role of a local centre. |
| **Net Floorspace** | Represents the level of internal area devoted to the sale of goods. |
| **Market Share** | Market shares derived from the household survey results, which are based on either the proportion of shopping trips or the proportion of expenditure attracted to a particular centre/facility. |
| **National Multiple** | This is a retail or service operator which is or part of a network of nine or more outlets. |
| **Price Base** | The price base for the Study is 2015; all prices are or have been adjusted to 2015 in order to be consistent. |
| **Rates of Productivity** | This takes into account the potential for existing retail floorspace to improve their turnover productivity (e.g. smaller goods could be sold from a smaller area for more money, increased opening hours, etc.). |
| **Sales Density** | Retail capacity figures are expressed in term of floorspace, relying on the application of assumed sales density figures to the surplus expenditure identified. This is based on the typical turnover of a store by square metre/foot. |
| **Special Forms of Trading** | Defined by Experian as expenditure not directed to traditional floorspace such as the internet, mail order, party plan and vending machines and other non-store activity such as market and road-side stalls. |
| **Study Area** | This represents the household survey area, which is based on postal sectors. |
| **Trade Draw** | This refers to the level of trade attracted to a particular facility/centre. |
| **Turnover** | The turnover figure relates to the annual turnover generated by existing retail facilities. |

**Town Centre**

A town centre will usually be the second level of centres after city centres and, in many cases, they will be the principal centre of centres in a local authority's area. In rural areas they are likely to be market towns and other centres of similar size and role which function as important service centres, providing a range of facilities and services for extensive rural catchment areas. In planning the future of town centres, local planning authorities should consider the function of different parts of the centre and how these contribute to its overall vitality and viability.