



Nathaniel Lichfield
& Partners
Planning. Design. Economics.

Northern Fringe, Ipswich

Assessment of Retail Requirements

Ipswich Borough Council

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Executive Summary

- 1 Nathaniel Lichfield & Partners has been commissioned to advise Ipswich Borough Council on the retail provision that will be required to serve a planned sustainable urban extension (SUE) at the Northern Fringe, Ipswich.
- 2 The Ipswich Core Strategy & Policies Development Plan Document, adopted in December 2011, identifies the Northern Fringe site at Policy CS10 as forming the main supply of housing land in Ipswich after 2021. Development of this site would represent a major urban extension to the town.
- 3 The Study quantifies the level of retail and service facilities needed within the SUE to serve the new population and the extent to which this development could also serve the existing population in this area of Ipswich. The report examines:
 - the key assumptions made in calculating the potential retail floorspace requirements;
 - the potential split of retail floorspace in terms of convenience goods, comparison goods and other non-retail Class A1 uses, together with Class A2, A3, A4 and A5 uses;
 - the potential format and location of the shopping facilities – eg. neighbourhood, local or district centres.
- 4 In undertaking the assessment, different scenarios have been considered, as follows:
 - **Scenarios 1A and 1B:** Core Strategy estimates of 1,000 (1A) and 1,500 (1B) new dwellings by 2021;
 - **Scenarios 2A and 2B:** higher estimates of 3,500 (2A) and 4,000 (2B) new dwellings by 2030; and
 - **Scenario 3:** maximum of 4,500 new dwellings by 2030.
- 5 The development strategy seeks to locate retail and other local facilities within an easy walking distance (500-800 metres) of all residents of the SUE. It will be necessary to have shops and services in place at an early stage of the development, to benefit the community and encourage people to use the centre(s) at the outset. A clear role should be established for the SUE centre(s) by creating a mix of shops, services and facilities and encourage choice and diversity, complementing the broader range of facilities in the surrounding area.
- 6 A review of the existing retail facilities within the catchment areas identifies that there is very limited provision, with the principal food store provision being small Co-op stores in each of the five local centres. There is currently a lack of choice in terms of operators within the local centres and the shops within the catchment area are predominantly small scale, older units. There is a lack of modern retail units that are likely to meet operator demand and consumer

expectation. Existing food shopping patterns, as evidenced by the Retail Study and Commercial Leisure Study 2010 are dominated by the large, out of centre food stores, particularly Morrison's at Sproughton Road, Sainsbury's at Hadleigh Road, and Asda at Goddard Road.

- 7 A staged approach to the assessment has been undertaken, in order to establish the amount of convenience and comparison goods floorspace that could be accommodated within the proposed SUE. The methodology adopted assesses the projected available expenditure in the future, taking into account population change, growth in average expenditure per capita and forecast changes in shopping patterns, and using our judgements to estimate the proportion of available expenditure that will be retained in the catchment area that will be available to support retail floorspace in the proposed urban extension.
- 8 The available surplus expenditure is then converted into potential new floorspace, based on assumed average sales densities for new floorspace. This also seeks to provide an appropriate balance and mix of different types of retail floorspace in order to meet any qualitative deficiencies in existing provision.
- 9 Scenarios 1A and 1B consider the development of 1,000 and 1,500 new dwellings by 2021, as set out in the Core Strategy. We consider that the implications of adopting either of these scenarios are likely to be:
- much smaller overall floorspace requirement of a very local nature;
 - floorspace requirement likely to be met within local or neighbourhood centres;
 - floorspace will not be sufficient to cater for “main” convenience goods shopping, and there will be a need to travel further afield to existing centres or superstores to undertake main shopping.
- 10 For Scenarios 2A (3,500 new dwellings by 2030), 2B (4,000 new dwellings) and 3 (4,500 new dwellings), the implications of adopting these scenarios are likely to be:
- larger overall floorspace requirement, will allow a greater range of services to be provided;
 - floorspace requirement likely to be met within one larger district centre, supported by two local centres;
 - provision of a medium-large foodstore will allow “main” convenience goods shopping to be undertaken within the SUE. The store should be of a sufficient size to attract customers and compete with large foodstores elsewhere, with a range of goods that will cater for full weekly shopping.
- 11 Scenario 2A is being used to inform the Council's SPD as this reflects the number of dwellings expected to be delivered on the site. The floorspace requirements for Scenario 2A can be summarised as follows:

Scenario 2A District Centre Requirements

Facility	Requirement	
	sq.m net	sq.m gross
Large Convenience Store	1,070 – 1,660	1,640 – 2,560
Convenience Stores	280	400
Comparison Stores	1,170 – 1,220	1,560 – 1,620
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	1,030 – 1,320	1,470 – 1,890
Total Retail Floorspace	3,550 – 4,480	5,070 – 6,470
Approximate land take	Up to 2-2.5 hectares	

Scenario 2A Local Centre Requirements (combined total for two local centres)

Facility	Requirement	
	sq.m net	sq.m gross
Convenience Stores	490	700
Comparison Stores	600	800
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	490	700
Total Retail Floorspace	1,580	2,200
Approximate land take for local centres (combined)	Up to 1.5 hectares	

- 12 It is assumed that the main district centre will contain up to one medium-large convenience store. The main district centre will also contain a range of smaller convenience goods stores, such as independent butchers, bakers, greengrocers, newsagents etc. The district centre will also be the main focus for the comparison goods and service floorspace, with a mix of shops and services providing choice and diversity to meet the needs of residents. The intention is for the district centre to enable the SUE to be as self-sufficient as possible, however it is not intended to provide a retail centre that will compete with existing higher order centres, particularly Ipswich town centre.
- 13 We would expect local centres to comprise a range of small shops of a local nature, serving a small catchment, typically to include a small supermarket/ convenience store, newsagent, post office, pharmacy and other facilities such as take aways and dry cleaners. These local centres would be complementary to the district centre.
- 14 Our view is that the preferred location for the district centre should be central within the SUE, in order to best serve the greatest proportion of the new residents and existing residents in the surrounding area. The exact location will however be dependent particularly on the location of the new infrastructure allowing access to the site. The two local centres should be distributed so that

they are within easy walking distance of new and existing residents as far as possible.

- 15 Potential retail floorspace capacity should also consider retailer demand, in this case from likely convenience store operators. The analysis of scale of supermarket and other shopping provision in other new settlements and urban expansion areas, coupled with current trends in retailer demand and recent appeal decisions, together provides the evidence to demonstrate the scale of store that would be deliverable.
- 16 The Study assesses the impact of the proposed retail floorspace within the SUE on existing retail facilities and designated centres within the catchment area. Scenario 2A (3,500 dwellings) is being used to inform the Council's SPD and the impact assessment has therefore focused on this scenario.
- 17 The impact assessment considers both the convenience and comparison goods impact of the proposed district centre. The assessment concludes that while there will be an impact on the existing convenience goods turnover of the local centres within the catchment area and the district centres close by, however we do not consider that the viability of any of the centres will be adversely affected by this level of trade diversion. The greatest level of trade diversion is forecast from the superstores - Asda, Goddard Road, Sainsburys, Hadleigh Road and Morrisons, Sproughton Road. Even with the level of trade diversion forecast, these stores will continue to trade at a level above their 2010 turnover. These stores are therefore not expected to be adversely harmed by the district centre. Further, these stores are in out of centre locations and therefore not protected by planning policy.
- 18 In terms of comparison goods impact, expenditure growth will more than offset trade diversion to the district centre. These figures suggest there will be sufficient expenditure growth, over and above that needed to support the SUE district centre, to support future investment and improvements within the existing centres.

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1.0 Introduction

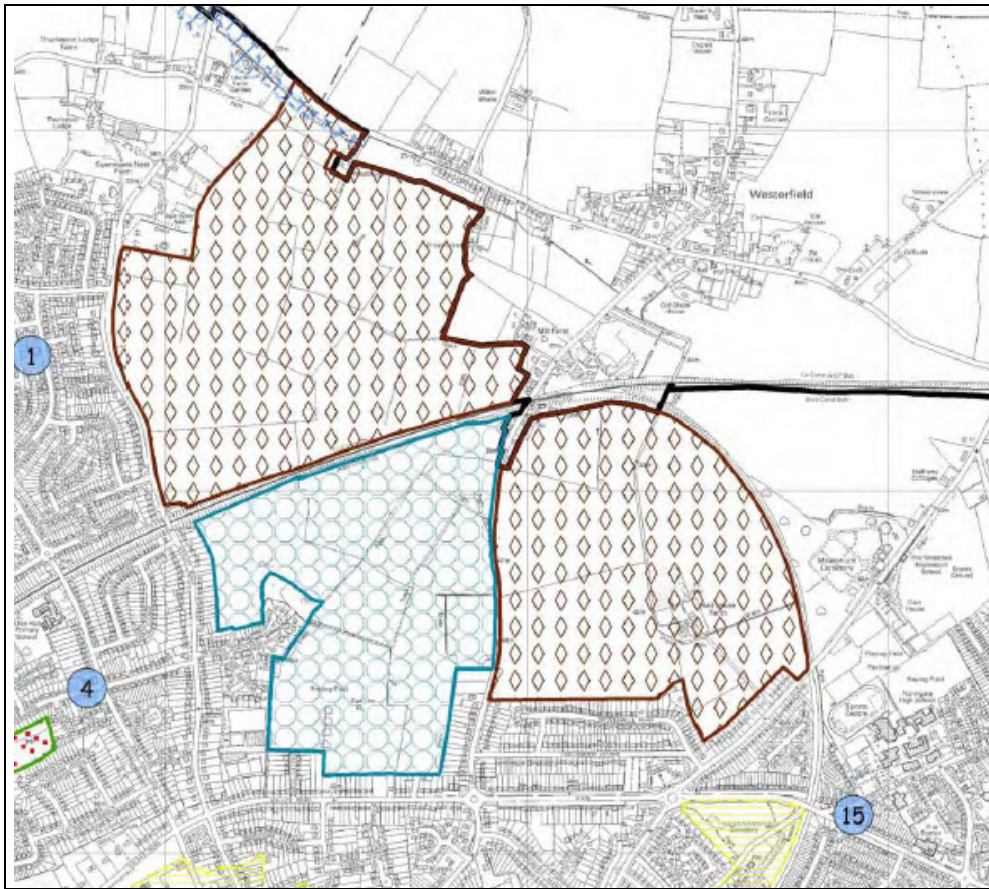
The Brief

- 1.1 Nathaniel Lichfield & Partners has been commissioned to advise Ipswich Borough Council on the retail provision that will be required to serve a planned sustainable urban extension (SUE) at the Northern Fringe, Ipswich.
- 1.2 The Brief for this Study was to assess the retail provision requirements to serve the SUE, with the results to be used to inform a development brief, which will be adopted as a supplementary planning document (SPD).
- 1.3 The Brief set out the following requirements:
- an assessment of the retail floorspace to meet the needs of the new community based on a possible range of units coming forward, from 1,000 to 4,500 dwellings;
 - an assessment of existing under-provision of retail uses in adjoining residential areas;
 - the setting out of any necessary guiding parameters for retail floorspace and land take requirements for district/local centres(s) within the Northern Fringe development which could be included within the SPD;
 - advice on possible options for meeting this provision, through district and/or local centre(s) (in terms of preferred locations in relation to the identified catchment area, and number and scale of retail units);
 - an assessment of the likely impact of retail floorspace provision at the Northern Fringe on the town centre and surrounding district and local centres and on existing shopping patterns;
 - advice on a threshold limit for the maximum foodstore size, which would not draw shoppers from a wider catchment or adversely impact on the local roads; and
 - advise on the retail provision that should be provided to meet the needs of the proposed new community and addressing any existing under-provision in the adjoining residential areas, without having any significant adverse impact on the existing town centre, district and local centres.
- 1.4 The Study therefore assesses the appropriate level of retail provision needed to serve both the proposed SUE, and identifies the provision needed to meet the need for additional retail provision in adjoining residential areas.

Planning Policy Background

- 1.5 The Ipswich Core Strategy & Policies Development Plan Document, adopted in December 2011, identifies the Northern Fringe site at Policy CS10 as forming the main supply of housing land in Ipswich after 2021. Development of this site would represent a major urban extension to the town.

Figure 1.1: Extract from Adopted Core Strategy Proposals Map showing extent of Northern Fringe SUE



- 1.6 Policy CS10 states that the delivery of 1,000 dwellings at the Northern Fringe will be expected to commence prior to 2021 on land to the east of Henley Road and south of the railway line. The supporting text to policy recognises that this might mean a maximum of 1,500 dwellings could be required in the Northern Fringe prior to 2021.
- 1.7 In the longer term, the total number of dwellings that could be accommodated at the Northern Fringe could be as much as 4,500, based on the Strategic Housing Land Availability Assessment, but this will be determined through a review of the Core Strategy.
- 1.8 The Core Strategy notes that even in developing 1,000 – 1,500 dwellings, the infrastructure requirements are likely to be significant, and include new roads and green routes, new public transport routes and services, green infrastructure such as allotments and sports facilities, new schools, new recreation provision, new healthcare provision and local shopping facilities.
- 1.9 Paragraph 9.119 of the Core Strategy notes that as an indication of appropriate scale, the Council expects additional food stores in District and Local Centres should not exceed 1,500 sq.m. net, in order to ensure the development is of a scale appropriate to serve the centre and not the town as a whole, which could in effect divert retail away from the town centre.

1.10 This report quantifies the level of retail and service facilities that is required within the SUE to serve the new population, and the extent to which this development could also serve the existing population in this area of Ipswich. The report examines:

- the key assumptions made in calculating the potential retail floorspace requirements;
- the potential split of retail floorspace in terms of convenience goods, comparison goods and other non-retail Class A1 uses, together with Class A2, A3, A4 and A5 uses;
- the potential format and location of the shopping facilities – eg. neighbourhood, local or district centres.

1.11 In undertaking the assessment, different scenarios have been considered, as follows:

- 1 **Scenarios 1A and 1B:** Core Strategy estimates of 1,000 (1A) and 1,500 (1B) new dwellings by 2021;
- 2 **Scenarios 2A and 2B:** higher estimates of 3,500 (2A) and 4,000 (2B) new dwellings by 2030; and
- 3 **Scenario 3:** maximum of 4,500 new dwellings by 2030.

2.0 Development Strategy and Design Criteria

Development Strategy

- 2.1 The development strategy seeks to locate retail and other local facilities within an easy walking distance (500-800 metres ¹) of all residents of the SUE. The configuration of the SUE may lend itself to a number of different configurations, and this report has assessed different scenarios.
- 2.2 The key elements of the strategy for retail provision within the SUE are as follows:
- a have shops and services in place at an early stage of the development, to benefit the community and encourage people to use the centre(s) at the outset;
 - b ensure that the centre(s) are distributed evenly throughout the SUE to maximise accessibility;
 - c establish a clear role for the SUE centre(s) by creating a mix of shops, services and facilities and encourage choice and diversity;
 - d create a centre(s) to meet the needs of the SUE's residents, while also complementing the broader range of facilities in the surrounding area;
 - e create centre(s) at an appropriate level within the established retail hierarchy.

Design Criteria

- 2.3 Reflecting the above strategy, the design criteria that have guided the development strategy include the following:
- a the SUE will have community facilities from an early stage of the development and the provision of additional floorspace will be balanced with housing and job growth;
 - b locate the centre(s) to ensure accessibility by sustainable transport modes;
 - c the SUE will have a vibrant and successful commercial and retail centre(s) appropriately located within the SUE;
 - d the centre(s) should provide a range of shopping facilities ensuring that a significant proportion of retail expenditure on day to day goods is retained within the SUE, promoting a level of self-sufficiency;

¹ Based on guidance contained within "Planning for Sustainable Development: Towards Better Practice", DETR October 1998, that refers to "easy walking distance" as being up to 800 metres.

- e the centre(s) will be located adjacent to other uses with a “walk-in” catchment such as the primary schools, and should be distributed so that all residents are within 500-800m walking distance from centre(s);
- f ensure that the development of the centre(s) coincides with the phasing of the residential development.

3.0

Existing Shopping Provision

Catchment Area

3.1

We have defined primary and secondary catchment areas for the proposed Northern Fringe sustainable urban extension (SUE), based on 1km and 2km distance rings from a central point within the SUE, as shown on the Plan in Appendix 2. The catchment areas have been defined to take into account the existing distribution of centres and retail facilities in the local area, recognising that shopping catchment areas will overlap.

3.2

Six local centres fall within the catchment area, as identified in the Core Strategy:

- 1. Fircroft Road;
- 2. Garrick Way;
- 4. Dale Hall Lane/Dales Road;
- 6. Norwich Road (197-307a);
- 15. Colchester Road (61-65); and
- 16. Brunswick Road.

3.3

The existing retail provision in the catchment area is typified by small scale convenience stores. Table 3.1 identifies the existing convenience retail facilities within the catchment area, based on information obtained from the Ipswich Borough Council Retail and Commercial Leisure Study and NLP's own site visits.

TABLE 3.1: EXISTING CONVENIENCE FOOD STORES WITHIN CATCHMENT AREA

Centre	Store	sq.m net	£ per sq.m	Turnover (£m)
1. Fircroft Road	Co-op, 147 Fircroft Road	292	£7,279	2.13
2. Garrick Way	Co-op, 17 Garrick Way	212	£7,279	1.54
4. Dale Hall Lane/Dales Road	Co-op, 214 Dales Road	138	£7,279	1.00
6. Norwich Road	Co-op, Norwich Road	93	£7,279	0.68
15. Colchester Road	Co-op, 65 Colchester Road	135	£7,279	0.98
16. Brunswick Road	n/a	n/a	n/a	n/a
Total		870		6.33

Source:

Ipswich Borough Council Retail & Commercial Leisure Study, 2010
Verdict Report on Grocery Retailers 2010

3.4

Table 3.2 summarises the other convenience and comparison facilities in the local centres within the catchment area, based on information obtained from the Ipswich Borough Council District and Local Shopping Centres, Autumn 2011 and NLP's own site visits. In terms of comparison goods, the local centres within the catchment area provide only a very limited offer in terms of the number and range of units, reflecting their local catchments.

TABLE 3.2: OTHER CONVENIENCE AND COMPARISON UNITS WITHIN CATCHMENT AREA

Centre	Store	Type
1. Fircroft Road	Co-op Pharmacy	Chemist
	The Crofts Bakery	Bakery
2. Garrick Way	Get Fresh	Flooring
	PA Collings	Greengrocers/Florist
	Richardsons Hardware	Hardware
	Fishers the Butcher	Butcher/Fishmonger
	Premier	Newsagent
	JK Stores	Newsagent
4. Dale Hall Lane/Dales Road	Penny Lane Computers Ltd	Computers
	Blooming Dales	Greengrocers
	Balfour Off Licence and News	Newsagent/Off Licence
	Krustys Bakery	Bakery
6. Norwich Road	Domestic Appliance Centre	Electrical
	Victoria's Bakery	Bakery
	CK Food and Wine	Newsagent
	Rainbow Pharmacy	Chemist
	Hicks Carpet Remnants	Flooring
	Pram Shop	Household
15. Colchester Road	MDE Electrical Supplies	Lighting
16. Brunswick Road	Brunswick Road Electrical Services	Electrical
	Mace	Newsagent/Off Licence
	Jarolds	Windows/Conservatories

Source:

Ipswich Borough Council District and Local Shopping Centres, Autumn 2011

3.5 Westerfield village is also located within the catchment area, outside of Ipswich Borough, however this centre does not contain any retail facilities.

3.6 In addition to the local centres within the catchment, there are three district centres located close to the catchment area, which provide a wider range of facilities, as set out in Table 3.3.

TABLE 3.3: EXISTING CONVENIENCE STORES IN DISTRICT CENTRES CLOSE TO CATCHMENT AREA

Centre	Store	sq.m net	£ per sq.m	Turnover (£m)
3. Meredith Road	Aldi, 14 Meredith Road	706	£6,148	4.34
	Co-op, 15-25 Meredith Road	450	£7,279	3.28
	Other convenience	276	£4,000	1.10
7. Norwich Road	Co-op, 16 Norwich Road	191	£7,279	1.39
	Other convenience	498	£4,000	1.99
18. Woodbridge Road	Spar, 777-779 Woodbridge Road	106	£4,000	0.42
	Other convenience	282	£4,000	1.13
Total		2,509		13.65

Source:

Ipswich Borough Council Retail & Commercial Leisure Study, 2010

Verdict Report on Grocery Retailers 2010

3.7 In terms of comparison goods, while the district centres provide a broader offer than the local centres, this is still relatively limited. Table 3.4 below identifies that the total comparison goods floorspace within these three district centres is

just 2,974 sq.m net, compared to Ipswich town centre which has a net comparison goods floorspace of 65,530 sq.m (Ipswich Borough Council Retail & Commercial Leisure Study, 2010).

TABLE 3.4: EXISTING COMPARISON STORES IN DISTRICT CENTRES CLOSE TO CATCHMENT AREA

Centre	Store	Type	sq.m net
3. Meredith Road	Aldi, 14 Meredith Road	Foodstore	71
	St Elizabeth Hospice	Charity Shop	
	Sense	Charity Shop	
	Hammonds video	Video Rental/Baby Clothes	
	Other comparison (total)		
7. Norwich Road	Beautiful Designs	Bridalwear	202
	Anglian Windows	Window Showroom	
	Lawrence	Windows/Conservatories	
	Ipswich Dancewear	Clothing	
	Just-a-day Bridalwear	Bridalwear	
	Second Hand	Household	
	Coes	Clothing	
	West End Music	Music	
	Town Domestic Appliance Centre	Domestic Appliances	
	Diamond Shield	Window Showroom	
	Bathstore	Bathrooms	
	Combat UK	Sports Equipment	
	ConetSat	TV	
	Private Adult Shop	Adult Fashion	
	Appliances	Fridges	
	Appliances R Us	Electrical Appliances	
	The Edge	TV/Video	
18. Woodbridge Road	Other comparison (total)		2,188
	Markhams	Fishing Tackle	
	New to You	Second hand clothes	
	Foxwood Ceramics	Hardware	
	AA Abbotts Antiques	Second hand goods	
	SS Showers	Bathroom and Shower products	
	Rushmere Pharmacy	Chemist	
	Primesight Opticians	Opticians	
	Easton Exchange Mart	Second hand goods	
	Office Furniture	Furniture	
	RM Grimes	Tailor	
	Persnicity	Second hand clothes	
	Other comparison (total)		
Total			2,974

Source:

Ipswich Borough Council Retail & Commercial Leisure Study, 2010

Ipswich Borough Council District and Local Shopping Centres, Autumn 2011

3.8 Beyond the catchment area to the west and south west, there are three large out of centre food stores:

- Asda, Goddard Road – 5,297 sq.m net;
- Sainsburys. Hadleigh Road – 4,166 sq.m net;
- Morrisons, Sroughton Road – 3,640 sq.m net.

[Note: these figures are the total convenience and comparison net sales floorspace of the stores.]

Deficiencies/Gaps in Existing Retail Provision

- 3.9 Existing retail provision within the catchment area is very limited, with the principal food store provision being small Co-op stores in each of the local centres. There is currently a lack of choice in terms of operators within the local centres.
- 3.10 The shops within the catchment area are predominantly small scale, older units. There is a lack of modern retail units that are likely to meet operator demand and consumer expectation.
- 3.11 The catchment area is therefore considered to be poorly served in terms of retail provision, in particular foodstores. As set out in Section 4.0 (Table 4.13), the total available convenience goods expenditure generated by residents in the catchment area is £43.21 million in 2012. The existing turnover of the foodstores in the catchment area of £6.33 million equates to less than 15% of this available expenditure and clearly only caters for “top-up” shopping. Main shopping trips currently need to be taken elsewhere.
- 3.12 The proposed new development at the SUE has the opportunity to address the existing deficiency in retail provision within the catchment area, and the intention is that this will provide existing and proposed residents with increased choice in the provision of retail facilities, in a more sustainable location, and provide a range of other shops and services, which will increase choice and competition for local residents.
- 3.13 If suitable convenience shopping facilities are not provided in the SUE, there is likely to be a high level of travel by car, particularly to the large out of centre stores, and there will be a clear deficiency in convenience shopping provision within the catchment. Existing comparison shopping provision within the catchment is limited to just 11 units within the local centres. The range and comparison offer does not cater for existing retail needs of local residents, and there is an opportunity for the SUE to enhance provision in order to address some of these retail needs, while remaining subsidiary to the higher order centre of Ipswich town centre.

Existing Shopping Patterns

- 3.14 The Ipswich Borough Council Retail and Commercial Leisure Study, prepared by Strategic Perspectives (SP) in October 2010, provides an assessment of the existing retail facilities and shopping patterns within Ipswich and its catchment area, informed by a household (telephone) survey undertaken in February 2010. The Northern Fringe SUE falls within Zone 8 of the catchment area defined by SP, which is just outside of the Inner Catchment Area (ICA, zones 1-4) that includes the majority of the Borough (see extract, Appendix 3).
- 3.15 The SP study estimates that the overall retention of convenience goods expenditure within the ICA is 97.5%, which is relatively high. The main food shopping destinations are dominated by the large, out of centre food stores as follows:

- Sainsbury's at Warren Heath – 16.6% of market share within the ICA;
- Morrison's at Sproughton Road – 13.6% of market share within the ICA;
- Sainsbury's at Hadleigh Road – 10.1 % of market share within the ICA;
- Tesco Extra at Copdock – 9.6% of market share within the ICA; and
- Asda at Goddard Road – 8.7% of market share within the ICA.

3.16 We note that the Waitrose store at Nacton Road/Ransomes Way (see retail commitments below) is also now trading, however it is not referred to above as its opening predates the Ipswich Borough Council Retail & Commercial Leisure Study and the market share assessment of out of centre food stores.

3.17 The SP study suggests the overall market share of the Borough's district centres (11.4%) and local centres (9.9%) for all food shopping trips in the ICA, however these centres have a much higher proportion of top-up shopping trips than main bulk food purchases, reflecting the smaller store sizes and local draw of these centres.

3.18 The results of the household survey indicate that only 1.1% of main food shopping trips are attracted by local centres located within the catchment area, compared with 5.4% of top-up food shopping trips. This reflects the limited food store provision in these local centres.

3.19 In terms of the existing trading performance of the convenience floorspace, the SP study indicates that two out of the three out of centre food superstores are trading significantly above their benchmark turnover, as set out in Table 3.5 below.

TABLE 3.5: MAJOR STORES BENCHMARK AND ACTUAL TURNOVER, 2010

Store	Benchmark Turnover (£m)	Actual Turnover (£m)	Difference
Asda, Goddard Road	49.2	43.5	-11.6%
Sainsburys, Hadleigh Road	33.8	39.7	17.5%
Morrisons, Sproughton Road	38.8	58.2	50.0%

Source:

Ipswich Borough Council Retail & Commercial Leisure Study, 2010

3.20 The Practice Guidance states that the extent to which the turnover of existing stores significantly exceeds benchmark turnover may be a qualitative indicator of need; for example, it may be an expression of the poor range of existing facilities or limited choice of stores and a lack of new floorspace within a locality (para. 3.16). The Guidance also notes (para. 3.17) that overcrowding/congestion indicates that existing provision is unable to cope adequately with consumer demand, ie. there is an imbalance between demand (available spending) and supply (existing floorspace capacity).

- 3.21 The SP study suggests that the district and local centres as a whole have a benchmark turnover of £77.0 million in 2010, compared to the actual turnover based on survey results of £65.6 million. This suggests that the centres are currently trading slightly below average.
- 3.22 Appendix 4 provides a plan showing the location of existing centres and food stores in the area surrounding the proposed SUE.
- 3.23 For comparison goods, the SP study suggests the Borough's facilities are retaining 80% of all comparison goods expenditure in the ICA. Ipswich town centre is the dominant destination, attracting a market share of 57.2% within the ICA. The district and local centres in the Borough combined achieve a comparison market share of just 1.4% within the ICA.
- 3.24 In terms of major retail commitments within Ipswich, we are aware that planning permission was granted for a mixed use scheme at Grafton Way, to include a Tesco Extra store with a net sales area of 7,282 sq.m and four retail/restaurant units (ref. 08/00953/FUL). A new application has been submitted for a revised scheme which reduces the size of the Tesco store to 5,340 sq.m net (ref. 12/00639/FUL). This application is currently pending determination.
- 3.25 There is a resolution to grant planning permission for a mixed use redevelopment at the Westgate Centre to include 14,929 sq.m retail floorspace, of which 2,500 sq.m gross is expected to comprise convenience goods floorspace (ref. 08/00806/FUL), however the S.106 remains outstanding.
- 3.26 Planning permission was granted in December 2011 for a Waitrose (2,294 sq.m net), John Lewis Home store (3,971 sq.m net) together with a bulky goods retail unit (4,788 sq.m net) at Nacton Road (ref. 11/00763/OUT). The Waitrose and John Lewis Home stores opened in November 2012. A full application was approved for the bulky goods unit increasing the floor area to 5,798 sq.m net and 189 sq.m (A3 use) in December 2012 (12/00615/FUL).
- 3.27 A Certificate of Lawfulness was issued in February 2012 confirming the technical start of a retail development comprising 3,600 sq.m gross food and non-food retail floorspace at the Norsk Hydro site, Sandyhill Lane (ref. 11/00865/CLD).

4.0

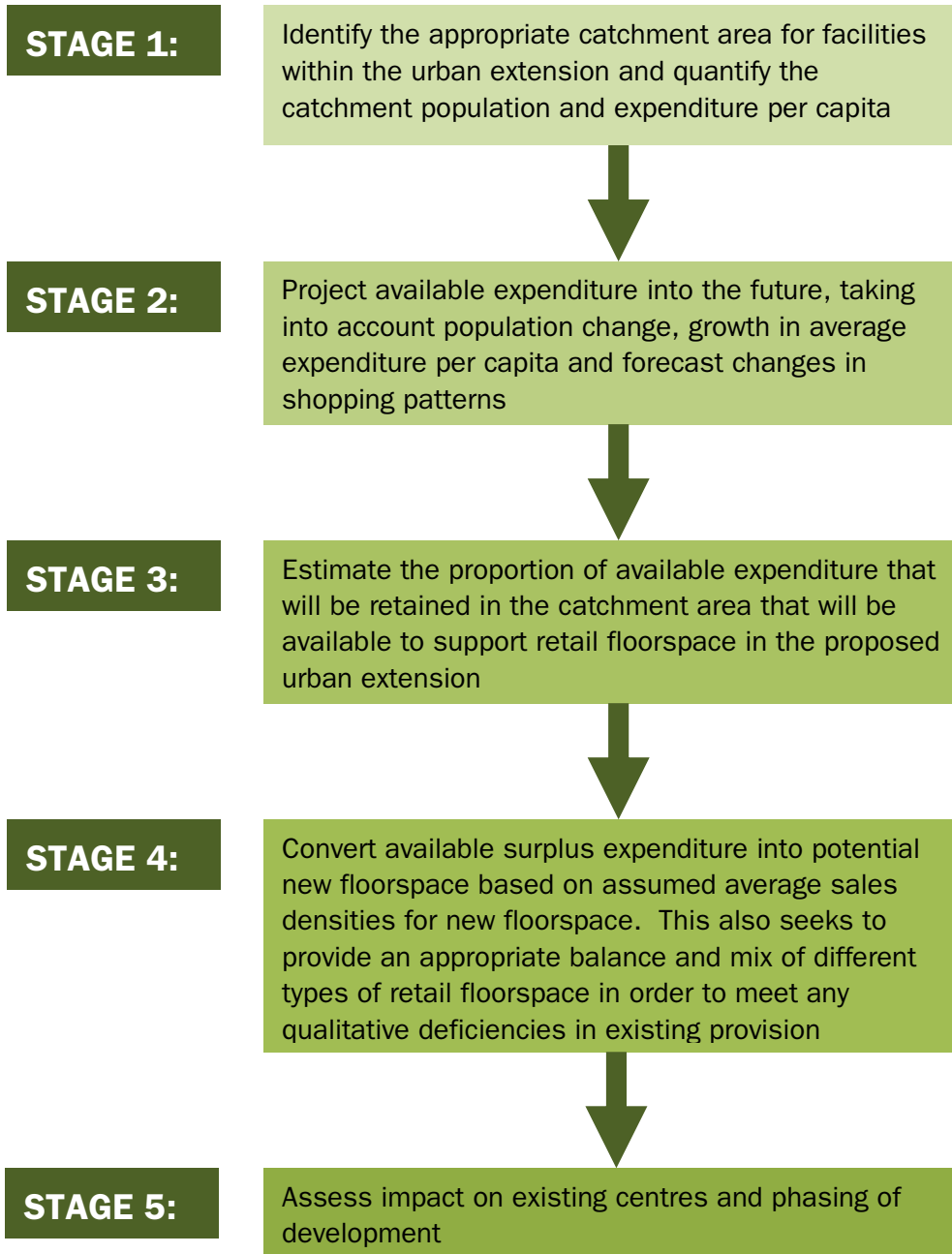
Expenditure Available to the Sustainable Urban Extension

4.1

An assessment has been undertaken in order to establish the amount of convenience and comparison goods floorspace that could be accommodated within the proposed SUE. The key data assumptions are set out in Appendix 1 and the methodology adopted is set out below.

4.2

We have adopted a staged approach, as follows:



Methodology

Catchment Population

- 4.3 The existing population within the primary and secondary catchment areas (see plan, Appendix 2) has been obtained from Experian for 2010 and projected forwards as set out Appendix 1 to 2012, 2016, 2021, 2026 and 2030, the year that the SUE should be completed if one of the higher dwelling number scenarios is adopted.

TABLE 4.1: EXISTING POPULATION

	2012	2016	2021	2026	2030
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	24,661	25,326	26,198	26,862

SUE Population

- 4.4 The Report assumes that development will be completed in 2021 if Scenarios 1A or 1B are adopted and by 2030 if the higher dwelling number scenarios are adopted. The estimated population of the SUE under the different scenarios is set out in Tables 4.2 to 4.6 below.

TABLE 4.2: SCENARIO 1A - CORE STRATEGY (LOW)

	2012	2016	2021	2026	2030
Number of House Completions	-	280	1,000	1,000	1,000
Total Population	-	672	2,400	2,400	2,400

TABLE 4.3: SCENARIO 1B - CORE STRATEGY (HIGH)

	2012	2016	2021	2026	2030
Number of House Completions	-	430	1,500	1,500	1,500
Total Population	-	1,032	3,600	3,600	3,600

TABLE 4.4: SCENARIO 2A - 3,500 HOUSES

	2012	2016	2021	2026	2030
Number of House Completions	-	440	1,540	2,640	3,500
Total Population	-	1,056	3,696	6,336	8,400

TABLE 4.5: SCENARIO 2B - 4,000 HOUSES

	2012	2016	2021	2026	2030
Number of House Completions	-	500	1,750	3,000	4,000
Total Population	-	1,200	4,200	7,200	9,600

TABLE 4.6: SCENARIO 3 - MAXIMUM 4,500 HOUSES

	2012	2016	2021	2026	2030
Number of House Completions	-	560	1,960	3,360	4,500
Total Population	-	1,344	4,704	8,064	10,800

4.5

Tables 4.7 to 4.11 summarise the total combined existing and proposed population within the catchment area, adopting the different scenarios.

TABLE 4.7: SCENARIO 1A - CORE STRATEGY (LOW)

	2012	2016	2021	2026	2030
Northern Fringe Population		672	2,400	2,400	2,400
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	25,333	27,726	28,598	29,262

TABLE 4.8: SCENARIO 1B - CORE STRATEGY (HIGH)

	2012	2016	2021	2026	2030
Northern Fringe Population		1,032	3,600	3,600	3,600
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	25,693	28,926	29,798	30,462

TABLE 4.9 - SCENARIO 2A - 3,500 HOUSES

	2012	2016	2021	2026	2030
Northern Fringe Population		1,056	3,696	6,336	8,400
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	25,717	29,022	32,534	35,262

TABLE 4.10: SCENARIO 2B - 4,000 HOUSES

	2012	2016	2021	2026	2030
Northern Fringe Population		1,200	4,200	7,200	9,600
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	25,861	29,526	33,398	36,462

TABLE 4.11: SCENARIO 3 - MAXIMUM 4,500 HOUSES

	2012	2016	2021	2026	2030
Northern Fringe Population		1,344	4,704	8,064	10,800
Primary Catchment Area	3,445	3,556	3,654	3,781	3,877
Secondary Catchment Area	20,451	21,105	21,672	22,418	22,985
Total	23,897	26,005	30,030	34,262	37,662

Available Expenditure

4.6 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for convenience and comparison goods for the catchment area have been obtained.

4.7 As set out in Appendix 1, Experian's latest national expenditure projections have been used to forecast expenditure growth between 2010 and 2030.

Convenience Goods Expenditure

4.8 Table 4.12 identifies the available convenience goods expenditure per person, based on national averages for the SUE, and Experian's local estimates for the primary and secondary catchment areas.

TABLE 4.12: CONVENIENCE GOODS EXPENDITURE PER PERSON

	2012	2016	2021	2026	2030
Northern Fringe Population	1,850	1,862	1,906	1,954	1,997
Primary Catchment Area	1,898	1,910	1,956	2,005	2,049
Secondary Catchment Area	1,793	1,805	1,848	1,894	1,935

4.9 Tables 4.13 to 4.17 below identify the total available convenience goods expenditure generated by the existing and proposed population within the catchment area, adopting the different scenarios.

**TABLE 4.13: SCENARIO 1A - CORE STRATEGY (LOW)
TOTAL CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.25	4.57	4.69	4.79
Primary Catchment Area	6.54	6.79	7.15	7.58	7.94
Secondary Catchment Area	36.67	38.09	40.05	42.46	44.48
Total	43.21	46.14	51.77	54.73	57.21

**TABLE 4.14: SCENARIO 1B - CORE STRATEGY (HIGH)
TOTAL CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.92	6.86	7.03	7.19
Primary Catchment Area	6.54	6.79	7.15	7.58	7.94
Secondary Catchment Area	36.67	38.09	40.05	42.46	44.48
Total	43.21	46.81	54.06	57.07	59.61

**TABLE 4.15: SCENARIO 2A - 3,500 HOUSES
TOTAL CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.97	7.04	12.38	16.77
Primary Catchment Area	6.54	6.79	7.15	7.58	7.94
Secondary Catchment Area	36.67	38.09	40.05	42.46	44.48
Total	43.21	46.85	54.24	62.42	69.19

**TABLE 4.16: SCENARIO 2B - 4,000 HOUSES
TOTAL CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	2.23	8.01	14.07	19.17
Primary Catchment Area	6.54	6.79	7.15	7.58	7.94
Secondary Catchment Area	36.67	38.09	40.05	42.46	44.48
Total	43.21	47.12	55.20	64.11	71.59

**TABLE 4.17: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOTAL CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	2.50	8.97	15.76	21.57
Primary Catchment Area	6.54	6.79	7.15	7.58	7.94
Secondary Catchment Area	36.67	38.09	40.05	42.46	44.48
Total	43.21	47.39	56.16	65.80	73.99

Main and Top-up Convenience Goods Expenditure Split

4.10

We have applied a main to top-up split of 70% to 30% to the available convenience goods expenditure. Tables 4.18 to 4.27 below summarise the amount of main and top-up expenditure available in the SUE and the primary and secondary catchment areas, assuming the various scenarios.

**TABLE 4.18: SCENARIO 1A - CORE STRATEGY (LOW)
MAIN CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.88	3.20	3.28	3.35
Primary Catchment Area	4.58	4.75	5.00	5.31	5.56
Secondary Catchment Area	25.67	26.67	28.03	29.72	31.13
Total	30.25	32.30	36.24	38.31	40.05

**TABLE 4.19: SCENARIO 1A - CORE STRATEGY (LOW)
TOP-UP CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.38	1.37	1.41	1.44
Primary Catchment Area	1.96	2.04	2.14	2.27	2.38
Secondary Catchment Area	11.00	11.43	12.01	12.74	13.34
Total	12.96	13.84	15.53	16.42	17.16

**TABLE 4.20: SCENARIO 1B - CORE STRATEGY (HIGH)
MAIN CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.35	4.80	4.92	5.03
Primary Catchment Area	4.58	4.75	5.00	5.31	5.56
Secondary Catchment Area	25.67	26.67	28.03	29.72	31.13
Total	30.25	32.77	37.84	39.95	41.73

**TABLE 4.21: SCENARIO 1B - CORE STRATEGY (HIGH)
TOP-UP CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.58	2.06	2.11	2.16
Primary Catchment Area	1.96	2.04	2.14	2.27	2.38
Secondary Catchment Area	11.00	11.43	12.01	12.74	13.34
Total	12.96	14.04	16.22	17.12	17.88

**TABLE 4.22: SCENARIO 2A - 3,500 HOUSES
MAIN CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.38	4.93	8.67	11.74
Primary Catchment Area	4.58	4.75	5.00	5.31	5.56
Secondary Catchment Area	25.67	26.67	28.03	29.72	31.13
Total	30.25	32.80	37.97	43.69	48.44

**TABLE 4.23: SCENARIO 2A - 3,500 HOUSES
TOP-UP CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.59	2.11	3.71	5.03
Primary Catchment Area	1.96	2.04	2.14	2.27	2.38
Secondary Catchment Area	11.00	11.43	12.01	12.74	13.34
Total	12.96	14.06	16.27	18.73	20.76

**TABLE 4.24: SCENARIO 2B - 4,000 HOUSES
MAIN CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.56	5.60	9.85	13.42
Primary Catchment Area	4.58	4.75	5.00	5.31	5.56
Secondary Catchment Area	25.67	26.67	28.03	29.72	31.13
Total	30.25	32.98	38.64	44.88	50.11

**TABLE 4.25: SCENARIO 2B - 4,000 HOUSES
TOP-UP CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.67	2.40	4.22	5.75
Primary Catchment Area	1.96	2.04	2.14	2.27	2.38
Secondary Catchment Area	11.00	11.43	12.01	12.74	13.34
Total	12.96	14.14	16.56	19.23	21.48

**TABLE 4.26: SCENARIO 3 - MAXIMUM 4,500 HOUSES
MAIN CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.75	6.28	11.03	15.10
Primary Catchment Area	4.58	4.75	5.00	5.31	5.56
Secondary Catchment Area	25.67	26.67	28.03	29.72	31.13
Total	30.25	33.17	39.31	46.06	51.79

**TABLE 4.27: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOP-UP CONVENIENCE GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	0.75	2.69	4.73	6.47
Primary Catchment Area	1.96	2.04	2.14	2.27	2.38
Secondary Catchment Area	11.00	11.43	12.01	12.74	13.34
Total	12.96	14.22	16.85	19.74	22.20

Comparison Goods Expenditure

- 4.11 Table 4.28 identifies the available comparison goods expenditure per person, based on national averages for the SUE, and Experian's local estimates for the primary and secondary catchment areas.

TABLE 4.28: COMPARISON GOODS EXPENDITURE PER PERSON

	2012	2016	2021	2026	2030
Northern Fringe Population	2,663	2,911	3,371	3,908	4,398
Primary Catchment Area	2,927	3,199	3,705	4,295	4,834
Secondary Catchment Area	2,721	2,975	3,444	3,993	4,494

- 4.12 Tables 4.29 to 4.33 below identify the total available comparison goods expenditure generated by the existing and proposed population within the catchment area, adopting the different scenarios.

**TABLE 4.29: SCENARIO 1A - CORE STRATEGY (LOW)
TOTAL COMPARISON GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	1.96	8.09	9.38	10.56
Primary Catchment Area	10.08	11.38	13.54	16.24	18.74
Secondary Catchment Area	55.65	62.79	74.64	89.51	103.29
Total	65.73	76.12	96.27	115.13	132.59

**TABLE 4.30: SCENARIO 1B - CORE STRATEGY (HIGH)
TOTAL COMPARISON GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	3.00	12.14	14.07	15.83
Primary Catchment Area	10.08	11.38	13.54	16.24	18.74
Secondary Catchment Area	55.65	62.79	74.64	89.51	103.29
Total	65.73	77.17	100.31	119.82	137.87

**TABLE 4.31: SCENARIO 2A - 3,500 HOUSES
TOTAL COMPARISON GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	3.07	12.46	24.76	36.94
Primary Catchment Area	10.08	11.38	13.54	16.24	18.74
Secondary Catchment Area	55.65	62.79	74.64	89.51	103.29
Total	65.73	77.24	100.64	130.51	158.98

**TABLE 4.32: SCENARIO 2B - 4,000 HOUSES
TOTAL COMPARISON GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	3.49	14.16	28.14	42.22
Primary Catchment Area	10.08	11.38	13.54	16.24	18.74
Secondary Catchment Area	55.65	62.79	74.64	89.51	103.29
Total	65.73	77.66	102.33	133.89	164.26

**TABLE 4.33: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOTAL COMPARISON GOODS EXPENDITURE (£M)**

	2012	2016	2021	2026	2030
Northern Fringe Population	0.00	3.91	15.86	31.51	47.50
Primary Catchment Area	10.08	11.38	13.54	16.24	18.74
Secondary Catchment Area	55.65	62.79	74.64	89.51	103.29
Total	65.73	78.08	104.03	137.27	169.53

Convenience Goods Spending Retained in the SUE

- 4.13 It is important to note that not all convenience goods expenditure will be available to support retail facilities in the SUE, as expenditure will continue to be attracted to other centres and existing superstores.
- 4.14 In order to inform assumptions in relation to the level of expenditure the SUE could retain, we have reviewed the Ipswich Borough Council Retail and Commercial Leisure Study prepared by Strategic Perspectives in 2010. This report assessed the market share of stores within Ipswich and its catchment area.
- 4.15 We have also reviewed urban expansion/new settlement schemes to compare the level of retail provision with the Northern Fringe SUE (Appendix 5). While none of these examples is directly comparable, they provide a useful point of reference. In terms of assessment of convenience goods expenditure retention, we note the following:

- **Buckshaw Village New Town, Chorley** (estimated population: 10,000) – assumes 75% of convenience expenditure retained in the primary catchment area and 20% from secondary catchment area;
- **Whitehill Bordon Eco Town, Hampshire** (estimated population: 9,400) – assumes 48% of convenience expenditure retained in its ‘home’ zone.

4.16 Informed by analysis of the studies noted above, and applying our judgement to the SUE context, we have assessed the different scenarios for expenditure retention and floorspace provision within the SUE.

Scenarios 1A and 1B: 1,000 (1A) and 1,500 (1B) new dwellings by 2021 Convenience Goods Retention

4.17 Table 4.34 below estimates the proportion of main and top-up convenience goods expenditure that we believe could reasonably be retained within the SUE if appropriate facilities are provided.

TABLE 4.34: SCENARIOS 1A AND 1B - CONVENIENCE GOODS RETENTION

	Main	Top-Up
Northern Fringe SUE	10%	50%
Primary Catchment Area	5%	25%
Secondary Catchment Area	-	-

4.18 These estimated retention figures reflects the fact that top-up convenience shopping are usually carried out locally where appropriate facilities are provided, but will also take place at other locations, for example close to where people work or “pass by”. The main and top-up retained convenience goods expenditure, i.e. the spending that will be available to support retail floorspace within the SUE, is set out in Tables 4.35 to 4.38 for Scenarios 1A and 1B. We have additionally made an allowance for a small amount (10%) of inflow from shoppers who live outside the catchment area, e.g. passing trade.

**TABLE 4.35: SCENARIO 1A - CORE STRATEGY (LOW)
MAIN CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.09	0.32	0.33	0.34
Primary Catchment Area	0.24	0.25	0.27	0.28
Secondary Catchment Area	-	-	-	-
Total	0.33	0.57	0.59	0.61

**TABLE 4.36: SCENARIO 1A - CORE STRATEGY (LOW)
TOP-UP CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.19	0.69	0.70	0.72
Primary Catchment Area	0.51	0.54	0.57	0.60
Secondary Catchment Area	-	-	-	-
Total	0.70	1.22	1.27	1.31

**TABLE 4.37: SCENARIO 1B - CORE STRATEGY (HIGH)
MAIN CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.13	0.48	0.49	0.50
Primary Catchment Area	0.24	0.25	0.27	0.28
Secondary Catchment Area	-	-	-	-
Total	0.37	0.73	0.76	0.78

**TABLE 4.38: SCENARIO 1B - CORE STRATEGY (HIGH)
TOP-UP CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.29	1.03	1.06	1.08
Primary Catchment Area	0.51	0.54	0.57	0.60
Secondary Catchment Area	-	-	-	-
Total	0.80	1.57	1.62	1.67

4.19

Tables 4.39 and 4.40 below provide a summary of the available convenience goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenarios 1A and 1B.

**TABLE 4.39: SCENARIO 1A - CORE STRATEGY (LOW)
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	0.33	0.57	0.59	0.61
Top-up	0.70	1.22	1.27	1.31
Inflow (10% of top-up)	0.07	0.12	0.13	0.13
Total	1.09	1.91	1.99	2.06

**TABLE 4.40: SCENARIO 1B - CORE STRATEGY (HIGH)
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	0.37	0.73	0.76	0.78
Top-up	0.80	1.57	1.62	1.67
Inflow (10% of top-up)	0.08	0.16	0.16	0.17
Total	1.25	2.45	2.54	2.62

4.20 It should be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

Scenarios 2A and 2B: 3,500 (2A) and 4,000 (2B) new dwellings by 2030 Convenience Goods Retention

4.21 These scenarios assume a larger centre can be provided that will create a critical mass that will draw trade from the wider primary and secondary catchment area. Table 4.41 below estimates the proportion of main and top-up convenience goods expenditure that we believe could be retained within the primary and secondary catchment area to support the proposed retail floorspace within the SUE for Scenarios 2A and 2B.

TABLE 4.41: SCENARIOS 2A AND 2B - CONVENIENCE GOODS RETENTION

	Main	Top-Up
Northern Fringe SUE	50%	75%
Primary Catchment Area	25%	50%
Secondary Catchment Area	5%	5%

4.22 Although these retention levels are relatively high, given the existing provision in the surrounding area, we consider that these should be achievable. The estimated retention levels reflect the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided but will also take place in various other locations, for example close to where people work or “pass by” journeys from elsewhere.

4.23 The main and top-up retained convenience goods expenditure, ie. the spending that will be available to support retail floorspace within the SUE, is set out in Tables 4.42 to 4.45 for Scenarios 2A and 2B.

**TABLE 4.42: SCENARIO 2A - 3,500 HOUSES
MAIN CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.69	2.47	4.33	5.87
Primary Catchment Area	1.19	1.25	1.33	1.39
Secondary Catchment Area	1.33	1.40	1.49	1.56
Total	3.21	5.12	7.15	8.82

**TABLE 4.43: SCENARIO 2A - 3,500 HOUSES
TOP-UP CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.44	1.59	2.79	3.77
Primary Catchment Area	1.02	1.07	1.14	1.19
Secondary Catchment Area	0.55	0.57	0.60	0.64
Total	2.01	3.23	4.52	5.60

**TABLE 4.44: SCENARIO 2B - 4,000 HOUSES
MAIN CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.78	2.80	4.92	6.71
Primary Catchment Area	1.19	1.25	1.33	1.39
Secondary Catchment Area	1.33	1.40	1.49	1.56
Total	3.30	5.45	7.74	9.66

**TABLE 4.45: SCENARIO 2B - 4,000 HOUSES
TOP-UP CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.50	1.80	3.17	4.31
Primary Catchment Area	1.02	1.07	1.14	1.19
Secondary Catchment Area	0.57	0.60	0.64	0.67
Total	2.09	3.47	4.94	6.17

4.24

We have additionally made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, ie. passing trade. This also takes into account employees working in the employment areas and other services, facilities and businesses within the SUE who will use the local centre but live outside the catchment area. We have estimated that the amount of inflow equates to 10% of the 'top-up' spending that is retained in the SUE.

4.25 Tables 4.46 and 4.47 below provide a summary of the available convenience goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenarios 2A and 2B.

**TABLE 4.46: SCENARIO 2A - 3,500 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.21	5.12	7.15	8.82
Top-up	2.01	3.23	4.52	5.60
Inflow (10% of top-up)	0.20	0.32	0.45	0.56
Total	5.42	8.67	12.12	14.98

**TABLE 4.47: SCENARIO 2B - 4,000 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.30	5.45	7.74	9.66
Top-up	2.09	3.47	4.94	6.17
Inflow (10% of top-up)	0.21	0.35	0.49	0.62
Total	5.61	9.28	13.17	16.45

4.26 Again, it should also be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

Scenario 3: 4,500 new dwellings by 2030 Convenience Goods Retention

4.27 Table 4.48 below estimates the proportion of main and top-up convenience goods expenditure that we believe could be retained within the primary and secondary catchment area to support the proposed retail floorspace within the SUE for Scenario 3.

TABLE 4.48: SCENARIO 3 - CONVENIENCE GOODS RETENTION

	Main	Top-Up
Northern Fringe SUE	50%	75%
Primary Catchment Area	25%	50%
Secondary Catchment Area	5%	5%

4.28 As with Scenarios 2A and 2B above, although these retention levels are relatively high, given the existing provision in the surrounding area, we consider that these should be achievable. The estimated retention levels reflect the fact that top-up convenience shopping in particular can be carried out locally where

appropriate facilities are provided but will also take place in various other locations, for example close to where people work or “pass by” journeys from elsewhere.

- 4.29 The main and top-up retained convenience goods expenditure, ie. the spending that will be available to support retail floorspace within the SUE, is set out in Tables 4.49 and 4.50 for Scenario 3.

**TABLE 4.49: SCENARIO 3 - MAXIMUM 4,500 HOUSES
MAIN CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.88	3.14	5.51	7.55
Primary Catchment Area	1.19	1.25	1.33	1.39
Secondary Catchment Area	1.33	1.40	1.49	1.56
Total	3.40	5.79	8.33	10.50

**TABLE 4.50: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOP-UP CONVENIENCE GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.56	2.02	3.55	4.85
Primary Catchment Area	1.02	1.07	1.14	1.19
Secondary Catchment Area	0.57	0.60	0.64	0.67
Total	2.15	3.69	5.32	6.71

- 4.30 We have additionally made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, ie. passing trade. This also takes into account employees working in the employment areas and other services, facilities and businesses within the SUE who will use the local centre but live outside the catchment area. We have estimated that the amount of inflow equates to 10% of the ‘top-up’ spending that is retained in the SUE.

- 4.31 Table 4.51 below provides a summary of the available convenience goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenario 3.

**TABLE 4.51: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.40	5.79	8.33	10.50
Top-up	2.15	3.69	5.32	6.71
Inflow (10% of top-up)	0.22	0.37	0.53	0.67
Total	5.77	9.85	14.18	17.88

4.32 Again, it should also be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

Comparison Goods Spending Retained in the SUE

4.33 For comparison goods, for all scenarios we have assumed that a much lower proportion of available expenditure will be retained within the SUE. This recognises that while the scale of any centres proposed within the SUE are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy. The estimated retention rates also take account of the offer of existing centres and settlements in the area, in particular Ipswich town centre. The levels of expenditure retention emphasises that the proposed comparison goods offer will be complementary to the existing offer within Ipswich, and a substantial amount of comparison spending will be created to support the centre.

4.34 Household survey data is less useful in seeking to establish comparison shopping patterns for smaller centres as the results tend to favour higher order centres as the last/other destinations for most categories of comparison goods. Table 4.52 below identifies the split between spending per person on categories of comparison goods, which has been obtained from Experian for the UK average. The highlighted categories are those which are more likely to be represented in a district and local centre. We would expect higher order categories, such as clothing and electrical goods to be very limited in a district or local centre, as residents would travel to larger centres (such as Ipswich town centre) to meet these comparison shopping requirements.

Table 4.52: Split of Comparison Goods Expenditure by goods category per person

Goods Category	%
Clothing materials and garments	22.04%
Games, toys and hobbies; sport and camping; musical instruments	10.83%
Appliances for personal care	9.67%
Audio-visual, photographic and information processing equipment	8.99%
Furniture and furnishings; carpets and other floor coverings	8.92%
Books and stationery	4.17%
Materials for maintenance and repair of the dwelling	3.93%
Shoes and other footwear	3.73%
Household textiles	3.25%
Jewellery, clocks and watches	3.14%
Recording media	2.94%
Major household appliances (electric or not)	2.90%
Medical goods and other pharmaceutical products	2.67%
Glassware, tableware and household utensils	2.15%
Gardens, plants and flowers	2.12%

Goods Category	%
Small tools and miscellaneous accessories	2.05%
Pets and related products	1.85%
Therapeutic appliances and equipment	1.57%
Other personal effects	1.40%
Bicycles	0.79%
Small electrical household appliances	0.41%
Major tools and equipment	0.24%
Non-Durable household goods	0.24%
Total Comparison Goods Expenditure	100.00%

4.35 The highlighted goods in Table 4.52 that may typically be found in a district or local centre account for a total of around 30% of available comparison goods expenditure per person. Clearly, we would not expect all of these goods categories to be represented in district or local centres, nor would we expect that anything other than a small proportion of the spending on any categories that are present within a local centre would be spent in that centre.

Scenarios 1A and 1B: 1,000 (1A) and 1,500 (1B) new dwellings by 2021 Comparison Goods Retention

4.36 Based on the above consideration, and using our judgement, Table 4.53 below provides an estimate of the proportion of comparison goods expenditure that we believe could be retained within the SUE to support the proposed retail floorspace within the SUE for Scenarios 1A and 1B.

TABLE 4.53: SCENARIOS 1A AND 1B - COMPARISON GOODS RETENTION

Northern Fringe SUE	5%
Primary Catchment Area	5%
Secondary Catchment Area	-

4.37 We have also made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, pass by trade, or for some people in immediately surrounding areas who will find these facilities convenient for local shopping.

4.38 Tables 4.54 and 4.55 below provide a summary of the available comparison goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenarios 1A and 1B.

**TABLE 4.54: SCENARIO 1A - CORE STRATEGY (LOW)
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.10	0.40	0.47	0.53
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	-	-	-	-
Inflow (5%)	0.04	0.06	0.07	0.08
Total	0.70	1.14	1.35	1.54

**TABLE 4.55: SCENARIO 1B - CORE STRATEGY (HIGH)
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.15	0.61	0.70	0.79
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	-	-	-	-
Inflow (5%)	0.04	0.07	0.08	0.09
Total	0.76	1.35	1.60	1.82

4.39 It should also be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

Scenarios 2A and 2B: 3,500 (2A) and 4,000 (2B) new dwellings by 2030 Comparison Goods Retention

4.40 Based on the above consideration, and using our judgement, Table 4.56 below provides an estimate of the proportion of comparison goods expenditure that we believe could realistically be retained within the primary and secondary catchment area to support the new centres within the SUE, for Scenarios 2A and 2B.

TABLE 4.56: SCENARIOS 2A AND 2B - COMPARISON GOODS RETENTION

Northern Fringe SUE	20%
Primary Catchment Area	5%
Secondary Catchment Area	2%

4.41 We have also made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, pass by trade, or for some people in immediately surrounding areas who will find these facilities convenient for local shopping.

4.42 Tables 4.57 and 4.58 below provide a summary of the available comparison goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenarios 2A and 2B.

**TABLE 4.57: SCENARIO 2A - 3,500 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.61	2.49	4.95	7.39
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.13	0.25	0.40	0.55
Total	2.57	4.91	7.95	10.94

**TABLE 4.58: SCENARIO 2B - 4,000 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.70	2.83	5.63	8.44
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.13	0.26	0.43	0.60
Total	2.66	5.26	8.66	12.05

4.43 Again, it should be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

Scenario 3: 4,500 new dwellings by 2030 Comparison Goods Retention

4.44 Based on the above consideration, and using our judgement, Table 4.59 below provides an estimate of the proportion of comparison goods expenditure that we believe could realistically be retained within the primary and secondary catchment area to support the new centres within the SUE, for Scenario 3.

TABLE 4.59: SCENARIO 3 - COMPARISON GOODS RETENTION

Northern Fringe SUE	20%
Primary Catchment Area	5%
Secondary Catchment Area	2%

4.45 We have also made an allowance for a small amount of inflow from shoppers who may combine shopping with a trip to the centre for another purpose, pass

by trade, or for some people in immediately surrounding areas who will find these facilities convenient for local shopping.

4.46 Table 4.60 below provides a summary of the available comparison goods expenditure to support retail floorspace within the SUE, based on the assumptions above, for Scenario 3.

**TABLE 4.60: SCENARIO 3 - MAXIMUM 4,500 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.78	3.17	6.30	9.50
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.14	0.28	0.47	0.66
Total	2.74	5.62	9.37	13.16

4.47 Again, it should be noted that the above assumptions and retention rates will vary depending upon the final retail offer and mix within the SUE and the evolution of the masterplan.

5.0

Summary of Retained Expenditure

5.1

Section 4.0 above sets out a step-by-step calculation of the available expenditure and assumptions applied in estimating the retention of spending within the SUE, adopting the various different scenarios. This section of the report draws together a summary of the retained expenditure within the SUE, applying the different scenarios.

Scenarios 1A and 1B: Retained Expenditure

5.2

Scenarios 1A and 1B assess the housing requirements set out in the Core Strategy, assuming 1,000 dwellings by 2021 for Scenario 1A and 1,500 dwellings by 2021 for Scenario 1B. Tables 5.1 and 5.2 below estimate the total retained convenience goods expenditure, for Scenarios 1A and 1B.

**TABLE 5.1: SCENARIO 1A - CORE STRATEGY (LOW)
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	0.33	0.57	0.59	0.61
Top-up	0.70	1.22	1.27	1.31
Inflow (10% of top-up)	0.07	0.12	0.13	0.13
Total	1.09	1.91	1.99	2.06

**TABLE 5.2: SCENARIO 1B - CORE STRATEGY (HIGH)
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	0.37	0.73	0.76	0.78
Top-up	0.80	1.57	1.62	1.67
Inflow (10% of top-up)	0.08	0.16	0.16	0.17
Total	1.25	2.45	2.54	2.62

5.3

Tables 5.3 and 5.4 below estimate the total retained comparison goods expenditure, for Scenarios 1A and 1B.

**TABLE 5.3: SCENARIO 1A - CORE STRATEGY (LOW)
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.10	0.40	0.47	0.53
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	-	-	-	-
Inflow (5%)	0.04	0.06	0.07	0.08
Total	0.70	1.14	1.35	1.54

**TABLE 5.4: SCENARIO 1B - CORE STRATEGY (HIGH)
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.15	0.61	0.70	0.79
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	-	-	-	-
Inflow (5%)	0.04	0.07	0.08	0.09
Total	0.76	1.35	1.60	1.82

Scenarios 2A and 2B: Retained Expenditure

5.4

Scenarios 2A and 2B assess a higher potential housing requirement, assuming 3,500 dwellings by 2030 for Scenario 2A and 4,000 dwellings by 2030 for Scenario 2B. Tables 5.5 and 5.6 below estimate the total retained convenience goods expenditure, for Scenarios 2A and 2B.

**TABLE 5.5: SCENARIO 2A - 3,500 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.21	5.12	7.15	8.82
Top-up	2.01	3.23	4.52	5.60
Inflow (10% of top-up)	0.20	0.32	0.45	0.56
Total	5.42	8.67	12.12	14.98

**TABLE 5.6: SCENARIO 2B - 4,000 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.30	5.45	7.74	9.66
Top-up	2.09	3.47	4.94	6.17
Inflow (10% of top-up)	0.21	0.35	0.49	0.62
Total	5.61	9.28	13.17	16.45

5.5 Tables 5.7 and 5.8 below estimate the total retained comparison goods expenditure, for Scenarios 2A and 2B.

**TABLE 5.7: SCENARIO 2A - 3,500 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.61	2.49	4.95	7.39
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.13	0.25	0.40	0.55
Total	2.57	4.91	7.95	10.94

**TABLE 5.8: SCENARIO 2B - 4,000 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.70	2.83	5.63	8.44
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.13	0.26	0.43	0.60
Total	2.66	5.26	8.66	12.05

Scenario 3: Retained Expenditure

5.6 Scenario 3 assess the maximum potential housing requirement of 4,500 dwellings by 2030. Tables 5.9 and 5.10 below estimate the total retained convenience and comparison goods expenditure for Scenario 3.

**TABLE 5.9: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOTAL RETAINED CONVENIENCE GOODS EXPENDITURE (£M)**

	2016	2021	2026	2030
Main	3.40	5.79	8.33	10.50
Top-up	2.15	3.69	5.32	6.71
Inflow (10% of top-up)	0.22	0.37	0.53	0.67
Total	5.77	9.85	14.18	17.88

**TABLE 5.10: SCENARIO 3 - MAXIMUM 4,500 HOUSES
COMPARISON GOODS RETENTION (£M)**

	2016	2021	2026	2030
Northern Fringe Population	0.78	3.17	6.30	9.50
Primary Catchment Area	0.57	0.68	0.81	0.94
Secondary Catchment Area	1.26	1.49	1.79	2.07
Inflow (5%)	0.14	0.28	0.47	0.66
Total	2.74	5.62	9.37	13.16

5.7

The next sections of this Report translate the available expenditure retained within the SUE under the different scenarios to floorspace requirements.

6.0

Retail Floorspace Requirements: Scenarios 1A and 1B

6.1

Scenarios 1A and 1B consider the development of 1,000 and 1,500 new dwellings by 2021, as set out in the Core Strategy. We consider that the implications of adopting either of these scenarios are likely to be:

- 1 much smaller overall floorspace requirement of a very local nature;
- 2 floorspace requirement likely to be met within local or neighbourhood centres;
- 3 floorspace will not be sufficient to cater for “main” convenience goods shopping, and there will be a need to travel further afield to existing centres or superstores to undertake main shopping.

Convenience Goods Floorspace

6.2

Generally all residents in the SUE should have at least one local centre within easy walking distance (500-800 metres ²). It is assumed that the convenience shopping requirements for Scenarios 1A and 1B will be catered for within small convenience goods stores, rather than a medium/large foodstore.

6.3

We have assumed an average turnover of £5,000 per sq.m in 2012 for the convenience goods floorspace, and we have assumed a net:gross floorspace ratio of 70%. We believe no growth in turnover efficiency of convenience floorspace is appropriate.

6.4

Although under Scenarios 1A and 1B, it is assumed that all new dwellings will be built by 2021, we have assessed the total floorspace requirement in 2030 for all scenarios tested, in order to consider future requirements.

6.5

Table 6.1 and 6.2 identify the total potential convenience goods floorspace that could be supported in the SUE in 2030, under Scenarios 1A and 1B.

² Based on guidance contained within “*Planning for Sustainable Development: Towards Better Practice*”, DETR October 1998, that refers to “easy walking distance” as being up to 800 metres.

**TABLE 6.1: SCENARIO 1A - CORE STRATEGY (LOW)
CONVENIENCE GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Convenience Floorspace	2.06	£5,000	412	589

**TABLE 6.2: SCENARIO 1B - CORE STRATEGY (HIGH)
CONVENIENCE GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Convenience Floorspace	2.62	£5,000	525	749

Comparison Goods Floorspace

- 6.6 An average turnover of £4,000 per sq.m in 2012 has been assumed for the comparison goods floorspace. Assuming a growth in turnover efficiency of 1.7% per annum from 2013, this equates to £5,327 per sq.m in 2030. We have therefore assumed an average turnover of £5,300 per sq.m for the comparison goods floorspace. We have also assumed a net:gross floorspace ratio of 75%.
- 6.7 Tables 6.3 and 6.4 identify the total potential comparison goods floorspace that could be supported in the SUE in 2030, under Scenarios 1A and 1B.

**TABLE 6.3: SCENARIO 1A - CORE STRATEGY (LOW)
COMPARISON GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Comparison Floorspace	1.54	£5,300	291	388

**TABLE 6.4: SCENARIO 1B - CORE STRATEGY (HIGH)
COMPARISON GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Comparison Floorspace	1.82	£5,300	343	458

Total Convenience and Comparison Goods Floorspace

- 6.8 Based on the above assumptions, if these figures are rounded, the total convenience and comparison goods floorspace that could be supported within the SUE in 2030 equates to approximately 1,000 sq.m (gross) for Scenario 1A and 1,210 sq.m (gross) for Scenario 1B.
- 6.9 It should be noted that these floorspace figures are based on current spending assumptions, and do not allow for potential changes in shopping patterns in the future. For example, if there is a significantly greater increase in the use of internet shopping than is currently forecast, then the level of retail floorspace required would reduce.

Non Convenience and Comparison Goods Floorspace

- 6.10 Within the centres, there will also be service floorspace. This will include other non-retail Class A1 uses such as a post office, hairdressers, travel agent etc. together with Class A2, A3, A4 and A5 uses. Based on a typical breakdown of uses within centres elsewhere, it has been assumed that the total floorspace of these units will equate to approximately 30% of the floorspace of the centre, and the combined convenience and comparison floorspace will equate to 70% of the total floorspace.
- 6.11 On this basis, the amount of non convenience and comparison goods floorspace is estimated to be about 430 sq.m (gross) for Scenario 1A and 520 sq.m (gross) for Scenario 1B.

Total Floorspace

- 6.12 Based on the above assumptions, the total floorspace (Use Classes A1, A2, A3, A4 and A5) that could be supported within the SUE as a whole in 2030 equates to approximately 1,430 sq.m (gross) for Scenario 1A and 1,730 sq.m (gross) for Scenario 1B.

**TABLE 6.5: SCENARIO 1A - CORE STRATEGY (LOW)
TOTAL FLOORSPACE REQUIREMENTS, 2030**

Floorspace Breakdown	sq.m gross
Convenience Goods	600
Comparison Goods	400
Non Convenience and Comparison Goods (other A1, A2, A3, A4 and A5)	430
Total	1,430

**TABLE 6.6: SCENARIO 1B - CORE STRATEGY (HIGH)
TOTAL FLOORSPACE REQUIREMENTS, 2030**

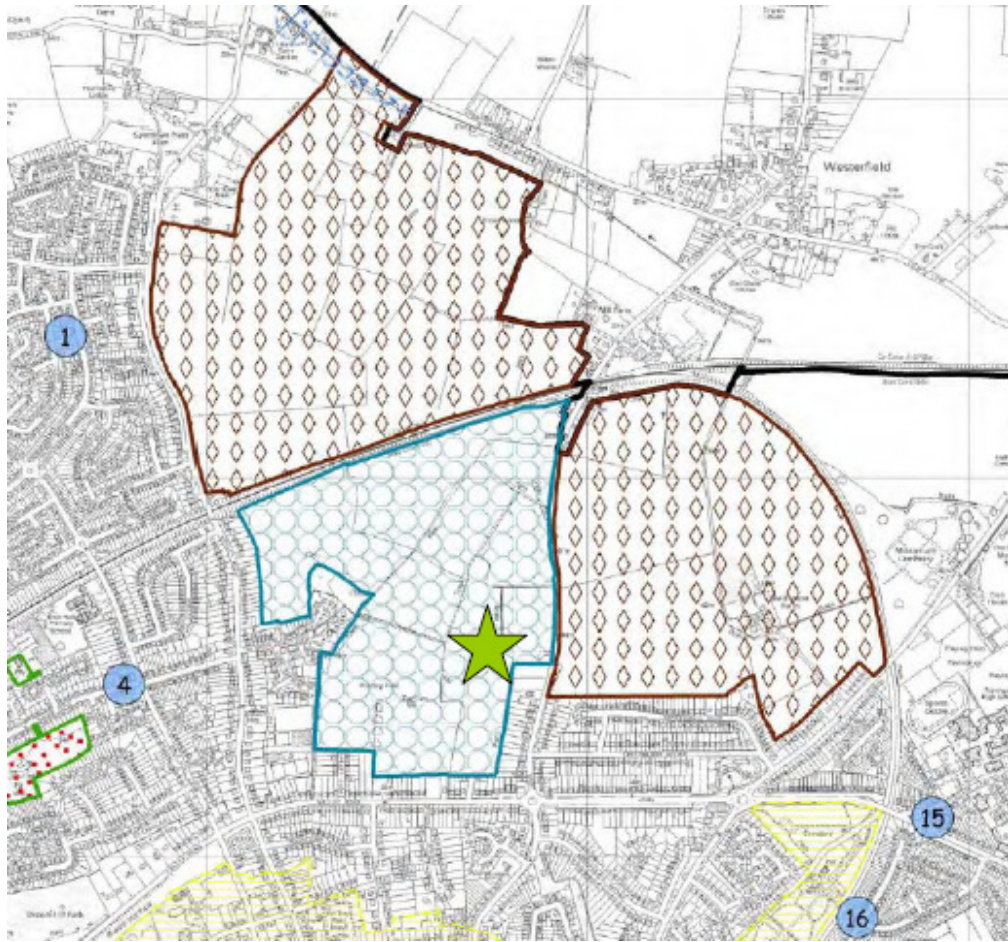
Floorspace Breakdown	sq.m gross
Convenience Goods	750
Comparison Goods	460
Non Convenience and Comparison Goods (other A1, A2, A3, A4 and A5)	520
Total	1,730

It should be noted that this figure does not include office, leisure (Class D2) or community facilities, which would support a vibrant and successful centre.

Centre Configuration

- 6.13 Based on the above floorspace requirements, our view is that for Scenarios 1A and 1B, the retail should be provided within a single local centre. This centre should include a small foodstore of around 350- 500 sq.m gross. This would be supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.
- 6.14 If the area to the south of the railway line and west of Westerfield Road is the area to be developed for housing prior to 2021, as shown on the Core Strategy Proposals Map, our view is that the preferred location for the local centre would be towards the south east of the site, where it could best serve both new residents and existing residents who do not currently have a local centre within easy walking distance, as shown on Figure 6.1 below.

Figure 6.1: Suggested Approximate Local Centre Location



7.0 **Retail Floorspace Requirements: Scenarios 2A and 2B**

7.1 Scenarios 2A and 2B consider the development of 3,500 and 4,000 new dwellings by 2030. We consider that the implications of adopting either of these scenarios are likely to be:

- 1 larger overall floorspace requirement, will allow a greater range of services to be provided;
- 2 floorspace requirement likely to be met within one larger district centre, supported by two local centres;
- 3 provision of a medium-large foodstore will allow “main” convenience goods shopping to be undertaken within the SUE. The store should be of a sufficient size to attract customers and compete with large foodstores elsewhere, with a range of goods that will cater for full weekly shopping.

Convenience Goods Floorspace

7.2 Applying the assumptions outlined Section 4.0, of the retained convenience goods expenditure, it has been assumed that 80% of this will be spent within supermarkets and 20% will be spent within other convenience goods stores, such as independent butchers, greengrocers, newsagents etc. This split is based on typical shopping behaviour ie. a mix of main and top-up shopping trips.

7.3 It is assumed that the main shopping requirements will be catered for within one medium/large foodstore, however, there are a number of potential configurations that could be incorporated within the centre. Providing a larger store of at least 1,000 sq.m net will also increase the potential for the SUE to be as self-sufficient as possible, by reducing the need for residents to travel to large supermarkets elsewhere, such as the Asda, Goddard Road, Sainsburys, Hadleigh Road and Morrisons, Sproughton Road. To complement the larger store, it is anticipated that there will be specialist convenience shopping and top-up convenience goods provision within local centres. We consider that the SUE could support two local centres in addition to the district centre to ensure all residents have easy access to shops and services. Generally all residents in the SUE should have at least one local centre within 500 metres walking distance.

7.4 We have considered a range of turnovers for the supermarket of between £8,000 per sq.m and £12,500 per sq.m in 2012. The higher turnover is based on the average sales density of the main supermarket operators (Asda, Morrisons, Sainsburys, Tesco and Waitrose) while the lower turnover could apply to an operator such as Co-op. We have not made any allowance for a growth in turnover efficiency of convenience goods floorspace. It should be

noted, however that if a discount retailer, such as Lidl or Aldi, occupied the unit, the average turnover for such stores is much lower (around £3,000 - £6,000 per sq.m) and as a result this would justify a higher level of convenience goods floorspace. For the large foodstore, we have assumed a net:gross floorspace ratio of 65%. An element of comparison goods floorspace will be located within the main foodstore, assumed to be 10% of the net sales area, in accordance with the Council's SPG: Out of Town Centre Shopping. There could be pressure to increase this depending on the eventual operator.

7.5 For the other, smaller stores, an average turnover of £4,000 per sq.m in 2012 has been assumed. For these units, we have assumed a net:gross floorspace ratio of 70%.

7.6 Tables 7.1 and 7.2 identify the total potential convenience goods floorspace that could be supported in the SUE in 2030, for Scenarios 2A and 2B.

**TABLE 7.1: SCENARIO 2A - 3,500 HOUSES
CONVENIENCE GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Large Foodstore - Lower Turnover				
Large Foodstore - Convenience Floorspace	11.98	£8,000	1,498	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	166	-
Large Foodstore (Lower Turnover) - Total	-	-	1,664	2,560
Large Foodstore - Higher Turnover				
Large Foodstore - Convenience Floorspace	11.98	£12,500	959	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	107	-
Large Foodstore (Higher Turnover) - Total	-	-	1,065	1,639
Other Small Convenience Shops/Stores	3.00	£4,000	749	1,070
Total	14.98		1,814 - 2,413	2,709 - 3,630

**TABLE 7.2: SCENARIO 2B - 4,000 HOUSES
CONVENIENCE GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Large Foodstore - Lower Turnover				
Large Foodstore - Convenience Floorspace	13.16	£8,000	1,645	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	183	-
Large Foodstore (Lower Turnover) - Total	-	-	1,828	2,812
Large Foodstore - Higher Turnover				
Large Foodstore - Convenience Floorspace	13.16	£12,500	1,053	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	117	-
Large Foodstore (Higher Turnover) - Total	-	-	1,170	1,799
Other Small Convenience Shops/Stores	3.29	£4,000	822	1,175
Total	16.45		1,992 - 2,650	2,974 - 3,987

Comparison Goods Floorspace

- 7.7 An average turnover of £4,000 per sq.m in 2012 has been assumed for the comparison goods floorspace. Assuming a growth in turnover efficiency of 1.7% per annum from 2013, this equates to £5,327 per sq.m in 2030. We have therefore assumed an average turnover of £5,300 per sq.m for the comparison goods floorspace. We have also assumed a net:gross floorspace ratio of 75%.
- 7.8 For the comparison goods floorspace within the main foodstore, we have assumed an average turnover of £7,000 per sq.m for the lower turnover option and £9,200 per sq.m for the higher turnover option in 2012. Assuming a growth in turnover efficiency of 1.7% per annum from 2013, this equates to around £9,300 and £12,250 per sq.m respectively in 2030. We have therefore deducted between £1.31 million (107 sq.m at £12,250 per sq.m) and £1.54 million (166 sq.m at £9,300 per sq.m) from the retained comparison goods expenditure for Scenario 2A and between £1.43 million (117 sq.m at £12,250 per sq.m) and £1.70 million (183 sq.m at £9,300 per sq.m) for Scenario 2B.
- 7.9 Tables 7.3 and 7.4 identify the total potential comparison goods floorspace that could be supported in the SUE in 2030, using Scenarios 2A and 2B.

**TABLE 7.3: SCENARIO 2A - 3,500 HOUSES
COMPARISON GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Comparison Floorspace (low foodstore t/o)	9.39	£5,300	1,772	2,363
Comparison Floorspace (high foodstore t/o)	9.63	£5,300	1,818	2,424

**TABLE 7.4: SCENARIO 2B - 4,000 HOUSES
COMPARISON GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Comparison Floorspace (low foodstore t/o)	10.35	£5,300	1,953	2,604
Comparison Floorspace (high foodstore t/o)	10.62	£5,300	2,003	2,671

- 7.10 As noted above, if the foodstore accommodated a larger comparison goods element, this would further reduce the requirement for additional comparison goods units to be accommodated in the district/local centres.

Total Convenience and Comparison Goods Floorspace

- 7.11 Based on the above assumptions, if these figures are rounded, the total convenience and comparison goods floorspace that could be supported within

the SUE in 2030 equates to between 5,070 and 6,050 sq.m (gross) for Scenario 2A and between 5,580 sq.m and 6,670 sq.m (gross) for Scenario 2B.

- 7.12 As stated in the previous section, it should be noted that these floorspace figures are based on current spending assumptions, and do not allow for potential changes in shopping patterns in the future.

Non Convenience and Comparison Goods Floorspace

- 7.13 Within the centres, there will also be a need to provide service floorspace. This will include other non-retail Class A1 uses such as a post office, hairdressers, travel agent etc. together with Class A2, A3, A4 and A5 uses. It has been assumed that the total floorspace of these units will equate to approximately 30% of the floorspace of the centre, and the combined convenience and comparison floorspace will equate to 70% of the total floorspace.

- 7.14 On this basis, the amount of non convenience and comparison goods floorspace is estimated to be between 2,110 and 2,580 sq.m (gross) for Scenario 2A and between 2,340 and 2,830 sq.m (gross) for Scenario 2B.

Total Floorspace

- 7.15 Based on the above assumptions, the total floorspace (Use Classes A1, A2, A3, A4 and A5) that could be supported within the SUE as a whole in 2030 equates to between 7,240 sq.m and 8,640 sq.m (gross) for Scenario 2A and between 7,970 sq.m and 9,530 sq.m (gross) for Scenario 2B.

**TABLE 7.5: SCENARIO 2A - 3,500 HOUSES
TOTAL FLOORSPACE REQUIREMENTS, 2030**

Floorspace Breakdown	sq.m gross
Convenience Goods	2,710 - 3,630
Comparison Goods	2,360 - 2,420
Non Convenience and Comparison Goods (other A1, A2, A3, A4 and A5)	2,170 - 2,590
Total	7,240 - 8,640

**TABLE 7.6: SCENARIO 2B - 4,000 HOUSES
TOTAL FLOORSPACE REQUIREMENTS, 2030**

Floorspace Breakdown	sq.m gross
Convenience Goods	2,980 - 4,000
Comparison Goods	2,600 - 2,670
Non Convenience and Comparison Goods (other A1, A2, A3, A4 and A5)	2,390 - 2,860
Total	7,970 - 9,530

It should be noted that this figure does not include office, leisure (Class D2) or community facilities, which would support a vibrant and successful centre.

District Centre/Local Centre Floorspace Split

- 7.16 As stated above, it has been assumed that for Scenarios 2A and 2B the SUE will comprise a district centre, supported by two local centres.
- 7.17 We would expect local centres to comprise a range of small shops of a local nature, serving a small catchment, typically to include a small supermarket, newsagent, post office, pharmacy and other facilities such as take aways and dry cleaners. It is therefore anticipated that a proportion of the above total floorspace requirement will be accommodated within small local centres, comprising an element of convenience goods floorspace and other “service” floorspace to serve everyday needs, with a limited amount of comparison goods floorspace. These local centres would be complementary to the district centre.
- 7.18 The local retail centres should be located adjacent to other uses with a “walk-in” catchment such as the primary schools, and will be distributed so that all residents are within a 500m walking distance from either a local centre or the main district centre.
- 7.19 Taking the figures above, and assuming that there are two local centres, Tables 7.7 and 7.8 estimate the floorspace split, for Scenario 2A and 2B.

**TABLE 7.7: SCENARIO 2A - 3,500 HOUSES
FLOORSPACE BREAKDOWN**

Floorspace Breakdown	Total sq.m gross	District Centre sq.m gross	Local Centres sq.m gross
Large Convenience Store	1,640 - 2,560	1,640 - 2,560	-
Small Convenience Stores	1,100	400	700
Comparison Stores	2,360 - 2,420	1,560 - 1,620	800
Service (non-retail Class A1 plus Class A2, A3, A4 and A4 uses)	2,170 - 2,590	1,470 - 1,890	700
Total	7,270 - 8,670	5,070 - 6,470	2,200

**TABLE 7.8: SCENARIO 2B - 4,000 HOUSES
FLOORSPACE BREAKDOWN**

Floorspace Breakdown	Total sq.m gross	District Centre sq.m gross	Local Centres sq.m gross
Large Convenience Store	1,800 - 2,810	1,800 - 2,810	-
Small Convenience Stores	1,200	500	700
Comparison Stores	2,600 - 2,670	1,800 - 1,870	800
Service (non-retail Class A1 plus Class A2, A3, A4 and A4 uses)	2,390 - 2,860	1,690 - 2,160	700
Total	7,990 - 9,540	5,790 - 7,340	2,200

- 7.20 This assumes that each local centre will contain a total of between 800 and 1,400 sq.m gross, and this is likely to comprise a convenience store of around 350 sq.m gross, together with a number of smaller units, which will typically contain a range of operators including, for example, a butchers, bakers,

newsagents, greengrocer, off-licence, chemist, opticians, hardware store, café, take away, hairdressers, dry cleaners, post office or travel agent. We would not expect the district/local centres to include all of these types of operators in each centre.

7.21 It is assumed that the main district centre will contain up one medium-large convenience store. The main district centre will also contain a range of smaller convenience goods stores, such as independent butchers, bakers, greengrocers, newsagents etc. The district centre will also be the main focus for the comparison goods and service floorspace, with a mix of shops and services providing choice and diversity to meet the needs of residents. The intention is for the district centre to support a community which is as self-sufficient as possible, however it is not intended to provide a retail centre that will compete with existing higher order centres, particularly Ipswich town centre.

7.22 Appendix 5 provides examples of urban extensions/new settlement schemes and indicates the range of retail provision within the district/local centres associated with these schemes.

7.23 We would suggest that the breakdown of units within the district centre of the SUE could, for example, be as follows:

Table 7.9: Possible SUE District Centre Composition – Scenario 2A, larger foodstore option

Unit	Floorspace (sq.m gross)
Foodstore	2,560
Pub (service use)	500
2 x 150-300 sq.m (comparison use)	450
2 x 150-300 sq.m (service use)	450
1 x 100-150 sq.m (convenience use)	125
5 x 100-150 sq.m (comparison use)	625
4 x 100-150 sq.m (service use)	500
4 x 50-100 sq.m (convenience use)	275
7 x 50-100 sq.m (comparison use)	545
6 x 50-100 sq.m (service use)	440
Total (33 units)	6,470

7.24 In our view, the suggested mix and number of units within the district centre in the above table would present a well balanced centre that would be commercially viable and capable of delivery. The foodstore would form the main anchor of the centre, and it is necessary to have a mix of other convenience, comparison and service units to make the centre function effectively as a centre. enhance the vitality and viability of the centre and serve local residents. This size of district centre is considered to be deliverable alongside the two local centres within the SUE.

7.25 In terms of the local centres, the breakdown of units/uses could, for example, be as follows:

Table 7.10: Possible SUE Local Centre Composition – Scenario 2A

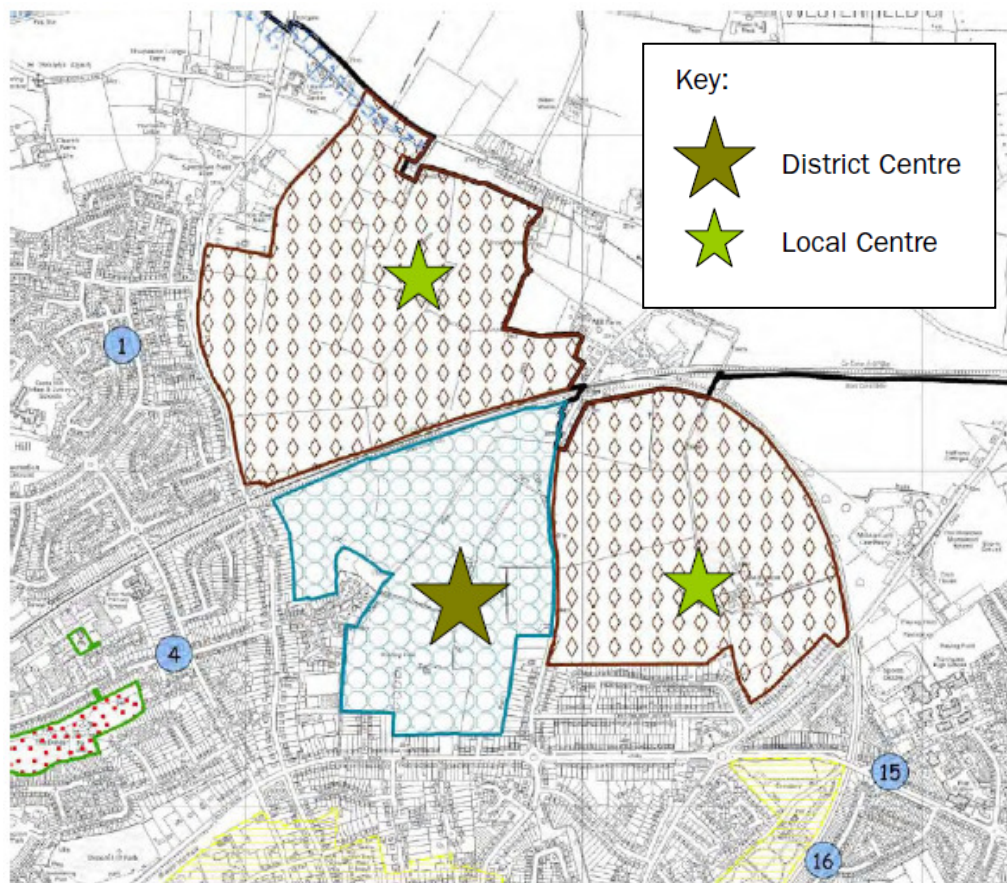
Unit	Floorspace (sq.m gross)
Convenience store	350
1 x 50-100 sq.m (convenience use)	75
5 x 50-100 sq.m (comparison use)	400
4 x 50-100 sq.m (service use)	300
Total (11 units)	1,125

Centre Configuration

7.26 Based on the above floorspace requirements, our view is that for Scenarios 2A and 2B, the retail should be provided within one district centre and two local centres.

7.27 Figure 7.1 below shows our suggested district and local centre locations.

Figure 7.1: Suggested Approximate District and Local Centre Locations



7.28 Our view is that the preferred location for the district centre should be central within the SUE, in order to best serve the greatest proportion of the new residents and existing residents in the surrounding area. The exact location will however be dependent upon a number of factors including the location of the new infrastructure allowing access to the site. The two local centres should be

distributed so that they are within easy walking distance of new and existing residents as far as possible.

8.0 Retail Floorspace Requirements: Scenario 3

8.1 Scenario 3 consider the maximum potential development of 4,500 new dwellings at the Northern Fringe SUE by 2030. The implications of adopting this Scenario will be similar to Scenarios 2A and 2B, namely:

- 1 larger overall floorspace requirement, will allow a greater range of services to be provided;
- 2 floorspace requirement likely to be met within one larger district centre, supported by two local centres;
- 3 provision of a medium-large foodstore will allow “main” convenience goods shopping to be undertaken within the SUE.

Convenience Goods Floorspace

8.2 For Scenario 3, the same assumptions have been applied to the convenience goods floorspace as for Scenarios 2A and 2B in terms of the split between main convenience stores and the average turnovers applied, as set out in Section 7.0.

8.3 Table 8.1 identifies the total potential convenience goods floorspace that could be supported in the SUE in 2030 for Scenario 3.

**TABLE 8.1: SCENARIO 3 - MAXIMUM 4,500 HOUSES
CONVENIENCE GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Large Foodstore - Lower Turnover				
Large Foodstore - Convenience Floorspace	14.30	£8,000	1,788	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	199	-
Large Foodstore (Lower Turnover) - Total	-	-	1,986	3,056
Large Foodstore - Higher Turnover				
Large Foodstore - Convenience Floorspace	14.30	£12,500	1,144	-
Large Foodstore - Comparison Floorspace (10% of total net sales)	-	-	127	-
Large Foodstore (Higher Turnover) - Total	-	-	1,271	1,956
Other Small Convenience Shops/Stores	3.58	£4,000	894	1,277
Total	17.88		2,165 - 2,880	3,233 - 4,333

Comparison Goods Floorspace

8.4 Again, for Scenario 3, the same assumptions have been applied to the comparison goods floorspace as for Scenarios 2A and 2B in terms of the average turnovers applied, as set out in Section 7.0.

- 8.5 Table 8.2 identifies the total potential comparison goods floorspace that could be supported in the SUE in 2030 for Scenario 3.

**TABLE 8.2: SCENARIO 3 - MAXIMUM 4,500 HOUSES
COMPARISON GOODS FLOORSPACE REQUIREMENTS, 2030**

	Retained Expenditure (£m)	Turnover £ per sq.m	sq.m net	sq.m gross
Comparison Floorspace (low foodstore t/o)	11.31	£5,300	2,135	2,846
Comparison Floorspace (high foodstore t/o)	11.60	£5,300	2,189	2,919

Total Convenience and Comparison Goods Floorspace

- 8.6 Based on the above assumptions, if these figures are rounded, the total convenience and comparison goods floorspace that could be supported within the SUE in 2030 equates to between 6,080 sq.m and 7,250 sq.m (gross) for Scenario 3.
- 8.7 As stated in the previous section, it should be noted that these floorspace figures are based on current spending assumptions, and do not allow for potential changes in shopping patterns in the future.

Non Convenience and Comparison Goods Floorspace

- 8.8 Within the centres, there will also be a need to provide service floorspace. This will include other non-retail Class A1 uses such as a post office, hairdresser, travel agent etc. together with Class A2, A3, A4 and A5 uses. It has been assumed that the total floorspace of these units will equate to approximately 30% of the floorspace of the centre, and the combined convenience and comparison floorspace will equate to 70% of the total floorspace.
- 8.9 On this basis, the amount of non convenience and comparison goods floorspace is estimated to be between 2,610 sq.m and 3,110 sq.m (gross) for Scenario 3.

Total Floorspace

- 8.10 Based on the above assumptions, the total floorspace (Use Classes A1, A2, A3, A4 and A5) that could be supported within the SUE as a whole in 2030 equates to between 8,690 sq.m and 10,360 sq.m (gross) for Scenario 3.

**TABLE 8.3: SCENARIO 3 - MAXIMUM 4,500 HOUSES
TOTAL FLOORSPACE REQUIREMENTS, 2030**

Floorspace Breakdown	sq.m gross
Convenience Goods	3,230 - 4,330
Comparison Goods	2,850 - 2,920
Non Convenience and Comparison Goods (other A1, A2, A3, A4 and A5)	2,610 - 3,110
Total	8,690 - 10,360

8.11 It should be noted that this figure does not include office, leisure (Class D2) or community facilities, which would support a vibrant and successful centre.

District Centre/Local Centre Floorspace Split

8.12 As stated above, it has been assumed that for Scenario 3, the SUE will comprise a district centre, supported by two local centres.

8.13 Taking the figures above, and assuming that there are two local centres, Table 8.4 estimates the floorspace split for Scenario 3.

**TABLE 8.4: SCENARIO 3 - MAXIMUM 4,500 HOUSES
FLOORSPACE BREAKDOWN**

Floorspace Breakdown	Total sq.m gross	District Centre sq.m gross	Local Centres sq.m gross
Large Convenience Store	1,960 - 3,060	1,960 - 3,060	-
Small Convenience Stores	1,280	500	780
Comparison Stores	2,850 - 2,920	2,050 - 2,120	800
Service (non-retail Class A1 plus Class A2, A3, A4 and A4 uses)	2,610 - 3,110	1,910 - 2,410	700
Total	8,700 - 10,370	6,420 - 8,090	2,280

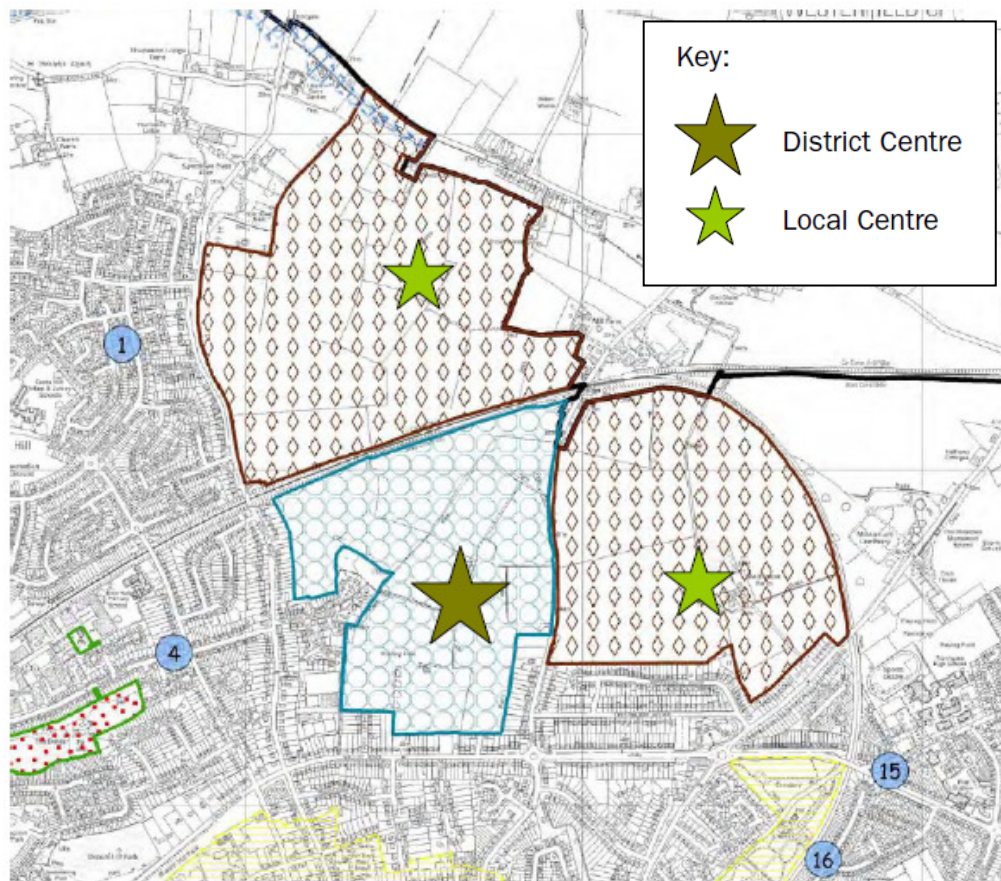
8.14 This assumes that each local centre will contain a total of between 900 and 1,400 sq.m gross, and this is likely to comprise a convenience store of around 300-400 sq.m gross, together with a number of smaller units, which will typically contain a range of operators including, for example, a butchers, bakers, newsagents, greengrocer, off-licence, chemist, opticians, hardware store, café, take away, hairdressers, dry cleaners, post office or travel agent.

8.15 It is assumed that the main district centre will contain up one large/medium convenience store. The main district centre will also contain a range of smaller convenience goods stores, such as independent butchers, bakers, greengrocers, newsagents etc. The district centre will also be the main focus for the comparison goods and service floorspace, with a mix of shops and services providing choice and diversity to meet the needs of residents. The intention is for the district centre to support a community which is as self-sufficient as possible, however it is not intended to provide a retail centre that will compete with existing higher order centres, particularly Ipswich town centre.

Centre Configuration

- 8.16 Based on the above floorspace requirements, our view is that for Scenario 3, the retail should be provided within one district centre and two local centres.
- 8.17 Our view is that the preferred location for the district centre should be central within the SUE, in order to best serve the greatest proportion of the new residents and existing residents in the surrounding area. The exact location will however be dependent upon a number of factors including the location of the new infrastructure allowing access to the site. The two local centres should be distributed so that they are within easy walking distance of new and existing residents as far as possible. Figure 8.1 below shows our suggested district and local centre locations.

Figure 8.1: Suggested Approximate District and Local Centre Locations



9.0

Retailer Demand

9.1

Potential retail floorspace capacity should also consider retailer demand, in this case from likely convenience store operators. Analysis of current retailer trends, as well as future aspirations, can assist in determining the likely floorspace requirements. Table 8.1 below is a snapshot of the current retailer trends.

Table 9.1: Retailer Floorspace Demand

Type of Retailer	Retailer	Average Store Size (sq.m net)	Range (sq.m net)
Major	Tesco	1,226	279 – 9,290
Major	Sainsbury's	1,904	232 – 9,290
Major	Asda	3,270	464 – 9,290 (includes Netto stores)
Major	Waitrose	1,672	279 – 5,574
Major	Morrisons	2,592	279 – 6,039
Major/Mid-range	M&S	1,672	186 – 9,290
Mid-range	Co-op	353	28 – 1,717
Mid-range	Budgens	437	43 – 1,393
Mid-range	Iceland	483	88 – 836
Discount	Aldi	836	186 – 1,394
Discount	Lidl	1,431	139 – 2,787

Source: Verdict 2011, IGD 2009 & Retailer Corporate Information

9.2

The sources used above have been used to establish current retailer trends to see whether there are formats suitable for the SUE district centre. It is clear from the figures above that the major retailers have traditionally been focused on large store formats. A change in recent years has seen the broadening of formats from these retailers to include smaller scale convenience stores, such as:

- Tesco Express (up to 280 sq.m net) and Metro (929 sq.m net plus) in high density urban areas and/or close to public transport interchanges;
- Little Waitrose (279 - 650 sq.m);
- Morrisons pilot M-Local stores (279 sq.m);
- Sainsbury's Local; and
- M&S Simply Food.

- 9.3 Supermarket operators are becoming increasingly more flexible in terms of store size.
- A Tesco Metro format generally requires a minimum store size of 929 sq.m net, while a Tesco Express store would undershoot it as the maximum size of Express stores is 280 sq.m net.
 - Sainsbury's have a small number of supermarkets (ie. larger than convenience store formats) that would fit the range, but are often positioned on the high street rather than in local/neighbourhood centres. The smaller format convenience stores from Sainsbury's and Morrisons are likely to be too small, whilst Asda is focused on its Netto fit out plan.
 - Alongside Tesco, Waitrose and M&S Simply Food are the other quality operators with a format that may suit the SUE district centre. The M&S corporate plan reveals they are keen to increase their presence in out of town locations with smaller store formats, and Little Waitrose is a new format seeking opportunities in affluent areas.
- 9.4 The smaller band of mid range retailers include Co-op, Budgens and Iceland. The Co-op are a well known neighbourhood retailer and currently have a foothold in the area with stores in the local and district centres. They are committed to neighbourhood retailing and plan to continue opening such stores. Iceland tends to focus on less affluent high street areas.
- 9.5 The local independently led retailer, Budgens, often occupies stores in local/neighbourhood centres. Poundbury Phase 1 is also home to a Budgens convenience store, an indication that these stores can be well suited to urban extensions/new settlements.
- 9.6 The discount retailers of Aldi and Lidl would suit the capacity range in terms of convenience floorspace. Aldi is typically associated with retail parks and district centres. Lidl stores tend to be slightly larger formats but the retailer has trialled smaller 'Express' stores in 2008, giving the impression they are prepared to adapt. Lidl are more flexible on store formats generally, but would typically require a 929 – 1,394 sq.m store.

Recent Appeals

- 9.7 We have also reviewed recent appeal decisions, which give an indication of recent retail operator aspirations.
- 9.8 In August 2010, an appeal by Tesco Stores Ltd in Ashtead, Surrey (ref. APP/C3620/A/10/2122996) for a 750 sq.m net new store was allowed. This appeal was considered in conjunction with an alternative proposal for a 1,115 sq.m, net store which was refused (ref. APP/C3620/A/09/2112341).
- 9.9 Ashtead is a large village with a population of approximately 13,500, the main convenience retail offer being an existing Tesco Express store (192 sq.m net). The Inspector considered that one of the key issues in assessing the appeal was whether the store would be too large in the context of Ashtead village centre or likely to harm the choice, vitality and viability of local shopping (para.

8). The Inspector stated that a supermarket of the size proposed (the smaller scheme) would consolidate the role and function of the district centre (para. 17). The Inspector noted that there is considerable leakage of trade from Ashtead (para. 16) and that a large majority of people around Ashtead go by car to out-of-centre stores or town centres at Leatherhead or Epsom, and states *"this pattern of retailing is unsustainable"* (para. 21). The Inspector concluded that the proposed store's function as an 'anchor' store in Ashtead would still be subservient to superstores within driving distance and would be convenient for top-up shopping, noting that a small Tesco Express store would do little to address the outflow of trade from Ashtead (para. 22).

- 9.10 The Inspector's conclusions are considered to be particularly relevant to the Northern Fringe SUE. If the proposed district centre does not provide a reasonable sized foodstore that will act as an anchor and allow residents to undertake some of their main food shopping within the centre, this would result in less sustainable shopping patterns, with significant levels of leakage to the larger, out of centre stores. A smaller convenience store would not be able to fulfil this role.
- 9.11 A second appeal by Tesco Stores Ltd in Faringdon, Oxfordshire was approved in July 2011 (ref. APP/V3120/A/10/2143419). Faringdon is a small town centre with a population of 6,187. The main existing convenience retail provision comprises a Budgens store (715 sq.m net). The Tesco proposal included a store with 2,140 sq.m gross, and a net sales area of 1,405 sq.m (1,260 sq.m convenience and 145 sq.m comparison). A large amount of convenience expenditure in the Faringdon area is being spent outside the local catchment, particularly at out-of-centre superstores, due to the town having a very limited convenience offer (para. 12), with less than 25% of expenditure retained by Budgens (para. 14). The Inspector noted that the justification for a new foodstore is based on the sustainable objective of encouraging more Faringdon residents to do their convenience shopping locally, and confirmed that it is unsustainable for a large proportion of the local population to have to travel a long way to undertake their main food shopping (para. 24). The Inspector's report did not specifically consider the acceptability of the scale of the store in the context of the centre, however concluded the scheme would not have significant adverse impacts on the centre (para. 30), implying that the scale is appropriate.
- 9.12 There are some parallels between the Ashtead and Faringdon appeals and the SUE, in terms of the limited existing retail provision, the influence of large out of centre stores on shopping patterns, and the role that the proposed supermarket seeks to fulfil. These appeals also demonstrate that Tesco is prepared to operate medium size supermarkets which perform a different role to the small Tesco Express stores; the same is true of Sainsburys, M&S and Waitrose too.

Summary

- 9.13 The analysis of scale of supermarket and other shopping provision in other new settlements and urban expansion areas, coupled with current trends in retailer demand and recent Tesco appeals, together provide an indication whether the scale of store identified in the needs assessment might be deliverable.
- 9.14 A number of options seem feasible for an anchor foodstore operator in the SUE district centre as follows:
- Tesco, Sainsbury, M&S and Waitrose would be the most likely foodstore operators of the major retailers. Tesco and Sainsbury have few medium format supermarkets, such as the Tesco Metro at Kesgrave, although the recent market activity suggests greater flexibility and a move towards medium supermarkets. M&S and Waitrose, although traditionally seen as affluent high street retailers, are showing willingness to move into this market.
 - Two compatible foodstore retailers from the mid-range are Budgens and Co-op. Budgens has proved to be successful in similar locations and sized settlements, but would need to be one of their larger format stores. The Co-op is a chain committed to medium format neighbourhood retailing and has market town formats that are comparable to the proposed SUE floorspace range.
 - The discounters all fit the indicative capacity floorspace range for a supermarket. Iceland's customary position is in less affluent high streets. Aldi or Lidl could be suited to a mixed-use district centre such as the SUE.

10.0

Summary of District and Local Centre Requirements

Scenarios 1A and 1B

10.1

Drawing together the previous sections of this report, Table 10.1 summarises the floorspace requirements for the SUE using Scenarios 1A and 1B, and assuming that all floorspace will be located within a single local centre.

Table 10.1: Scenarios 1A and 1B Local Centre Floorspace Requirements

Facility	Requirement	
	sq.m net	sq.m gross
Convenience Stores	410 – 525	600 – 750
Comparison Stores	290 – 340	400 – 460
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	300 – 360	430 – 520
Total Retail Floorspace	1,000 – 1,225	1,430 – 1,730
Approximate land take	Up to 1 hectare	

Scenarios 2A and 2B

10.2

Drawing together the previous sections of this report, Tables 10.2, 10.3 and 10.4 summarise the requirements for the main district and two local centres that should be located within the SUE under Scenarios 2A and 2B.

Table 10.2: Scenario 2A District Centre Requirements

Facility	Requirement	
	sq.m net	sq.m gross
Large Convenience Store	1,070 – 1,660	1,640 – 2,560
Convenience Stores	280	400
Comparison Stores	1,170 – 1,220	1,560 – 1,620
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	1,030 – 1,320	1,470 – 1,890
Total Retail Floorspace	3,550 – 4,480	5,070 – 6,470
Approximate land take	Up to 2-2.5 hectares	

Table 10.3: Scenario 2B District Centre Requirements

Facility	Requirement	
	sq.m net	sq.m gross
Large Convenience Store	1,170 – 1,830	1,800 – 2,810
Convenience Stores	350	500
Comparison Stores	1,350 – 1,400	1,800 – 1,870
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	1,180 – 1,510	1,690 – 2,160
Total Retail Floorspace	4,050 – 5,090	5,790 – 7,340
Approximate land take	Up to 2.5-3 hectares	

Table 10.4: Scenarios 2A and 2B Local Centre Requirements (combined total for two local centres)

Facility	Requirement	
	sq.m net	sq.m gross
Convenience Stores	490	700
Comparison Stores	600	800
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	490	700
Total Retail Floorspace	1,580	2,200
Approximate land take for local centres (combined)	Up to 1.5 hectares	

Scenario 3

10.3

Drawing together the previous sections of this report, Tables 10.5 and 10.6 summarise the requirements for the main district and two local centres that should be located within the SUE under Scenario 3.

Table 10.5: Scenario 3 District Centre Requirements

Facility	Requirement	
	sq.m net	sq.m gross
Large Convenience Store	1,270 – 1,990	1,960 – 3,060
Convenience Stores	350	500
Comparison Stores	1,540 – 1,590	2,050 – 2,120
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	1,340 – 1,690	1,910 – 2,410
Total Retail Floorspace	4,500 – 5,620	6,420 – 8,090
Approximate land take	Up to 3 hectares	

Table 10.6: Scenario 3 Local Centre Requirements (combined total for two local centres)

Facility	Requirement	
	sq.m net	sq.m gross
Convenience Stores	550	780
Comparison Stores	600	800
Service (non-retail Class A1, plus Class A2, A3, A4 and A5 uses)	490	700
Total Retail Floorspace	1,640	2,280
Approximate land take for local centres (combined)	Up to 1.5 hectares	

- 10.4 The potential land take for the district and local centres are, at this stage approximate, and have been provided for the purposes of discussion around Masterplan issues. It should be noted that these figures exclude an allowance for other complementary facilities that may be found in the district and local centres, such as offices, sports and leisure uses, GP practices, dentists and other community facilities such as libraries. Regard will need to be had to eventual retail requirements as well as other factors such as the potential for the co-location of different users and the desire to locate certain facilities alongside employment uses, schools etc.

Making it Happen

- 10.5 To ensure that the district and local centre elements of the SUE is realised in the most effective and sustainable way, it will be necessary to:
- phase development of the retail offer to ensure a balance between the SUE's resident population and available shops and services. An appropriate proportion/mix of retail development will need to be brought forward to match each phase of housing development, however this will depend upon which scenario is developed.
 - if Scenario 2A, 2B or 3 are progressed, ideally retail facilities should be provided at the beginning of the first phase, in particular the larger foodstore should be available to support the first residents of the SUE. Other facilities such as a pharmacy, bank etc. will also need to be provided.
 - develop and refine the SUE's overall retail offer to provide facilities which complement rather than directly compete with Ipswich Town Centre.
- 10.6 The phasing of the development of the SUE will be determined through the Core Strategy review and the SPD.

11.0

Impact Considerations

- 11.1 As part of the Brief, we have been asked to assess the impact of the proposed retail floorspace within the SUE on existing retail facilities and designated centres within the catchment area. Scenario 2A (3,500 dwellings) is being used to inform the Council's SPD as this reflects the number of dwellings expected to be delivered on the site, and the impact assessment has therefore focused on this scenario.
- 11.2 The assessment of floorspace requirements set out in the previous sections is based on the requirements of the final population of the SUE in 2030. However, we do not consider that the retail floorspace will be phased incrementally to match population growth year by year. A critical mass of floorspace will be required to make the district and local centres viable. We have assumed that the district centre will be developed before the two local centres, in order to meet the needs of residents in the first phases of retail development.
- 11.3 We have assumed that the district centre will be completed by 2019 at the earliest, and will reach full and settled trading patterns in 2021. By 2021, the population of the SUE could reach around 3,700 people. Assessing impact in 2021 represents a robust "worst case" in terms of proportional impact on existing facilities, taking into account the SUE will only be about 45% complete and expenditure growth in the catchment area will be more limited when compared to the end date of 2030.

Convenience Goods Impact

Proposed Floorspace and Turnover

- 11.4 The district centre will be anchored by a medium-large food store (1,640 to 2,560 sq.m gross), supported by about 400 sq.m gross of other convenience shops.
- 11.5 The food store is likely to have a convenience goods sales area of between 960 to 1,500 sq.m net. The small convenience shops could provide around 300 sq.m net. Based on these sales floorspace figures the total convenience goods turnover of the district centre is likely to be around £13.18 million.

Base Year 2010 Trading Levels

- 11.6 For consistency with the Ipswich Borough Council Retail and Commercial Leisure Study (RCLS) 2010, we have used 2010 as the base year. Table 1 in Appendix 6 estimates the turnover of existing convenience goods facilities within the catchment area, and centres and facilities beyond the catchment. We have assumed a benchmark turnover for the local and district centres, and

where available, used actual turnover figures obtained from the RCLS for the out of centre foodstores and Ipswich town centre.

- 11.7 The convenience goods turnover of the local centres within the catchment area is estimated to be £7.93 million. The dominance of the large out of centre stores is evident.

Design Year 2021 Trading Levels

- 11.8 The future turnover of convenience facilities in the design year of 2021 is shown in Table 3, Appendix 6. This also takes into account the major retail commitments that may be implemented and trading by 2021. For the local and district centres, we have not allowed for an increase in turnover efficiency between the base year and design year. For the out of centre stores and Ipswich town centre, we have adopted the turnover estimates for 2021 as set out in the RCLS.

2021 Trading Levels – With SUE District Centre

- 11.9 Convenience goods turnovers at 2021 and estimated trade diversion from the SUE district centre are set out in Table 5 in Appendix 6. The estimated levels of trade diversion have been based on existing shopping patterns identified in the RCLS, a review of the existing offer of the local and district centres and using our judgement. The greatest level of trade diversion is forecast from the superstores - Asda, Goddard Road, Sainsburys, Hadleigh Road and Morrisons, Sproughton Road. As noted in Section 3, both the Sainsburys and Morrisons stores are currently trading above company average turnover levels.
- 11.10 The impacts of the SUE district centre are summarised in Table 6 in Appendix 6. The total turnover of the local centres within the catchment area is estimated to reduce from £7.93 million to £7.27 million, an overall reduction of 8.3%. It is likely that this trade will be drawn primarily from the Co-op stores located within each of the local centres. The greatest impact in terms of percentage (11.5%) will fall on Fircroft Road local centre, however we do not consider that this level of impact would result in the closure of the Co-op store.
- 11.11 Outside the catchment area, some trade is forecast to be diverted from the closest district centres. The highest proportion of trade diversion from a district centre is from Meredith Road, which contains an Aldi and Co-op supermarkets, with an impact of 11.3%. We do not consider that the viability of the centre will be affected by this level of trade diversion.
- 11.12 The greatest level of trade diversion is forecast from the superstores - Asda, Goddard Road, Sainsburys, Hadleigh Road and Morrisons, Sproughton Road. As noted in Section 3, both the Sainsburys and Morrisons stores are currently trading above company average turnover levels. Even with the level of trade diversion forecast, these stores will continue to trade at a level above their 2010 turnover. These stores are therefore not expected to be adversely harmed by the district centre. The district centre will help to relieve high trade and congestion at peak periods within these existing stores and will provide

more choice for customers. Further, these stores are in out of centre locations and therefore not protected by planning policy.

11.13 The turnover of foodstores within Ipswich town centre is estimated to increase from £16.0 million in 2010 to £18.5 million in 2021, despite trade diversion to the SUE district centre. A limited impact is forecast on the committed developments at Grafton Way, Nacton Road, Westgate Centre and the Norsk Hydro site. If these schemes do not materialise, the trade diversion would be redistributed to other convenience facilities elsewhere.

11.14 The impact figures suggest the proposed SUE district centre can assist in absorbing current high trading levels within large food stores and future expenditure growth. The proposed SUE district centre will contribute to meeting some of this projected retail capacity, but will need to ensure it is of an appropriate scale to serve the new community.

Comparison Goods Impact

Proposed Floorspace and Turnover

11.15 The district centre is expected to include up to 1,620 sq.m gross of comparison goods floorspace, with a sales area of about 1,215 sq.m net. The total comparison goods turnover of the district centre, including comparison sales within the proposed food store, is likely to be around £7.74 million.

Base Year 2010 Trading Levels

11.16 Table 1 in Appendix 7 estimates the turnover of existing comparison goods facilities within the catchment area, and centres and facilities beyond the catchment. We have assumed a benchmark turnover for the local and district centres and the out of centre foodstores, and used actual turnover figures obtained from the RCLS for Ipswich town centre.

11.17 Given the limited comparison provision within the local and district centres, the most likely centre to be affected by the proposed SUE district centre is Ipswich town centre, with a turnover of £486.60 million.

Design Year 2021 Trading Levels

11.18 The future turnover of comparison facilities in the design year of 2021 is shown in Table 3, Appendix 7. This also takes into account the major retail commitments that may be implemented and trading by 2021. An increase in turnover efficiency of 1.7% per annum after 2013 has been applied to existing comparison floorspace. For Ipswich town centre, we have adopted the turnover estimates for 2021 as set out in the RCLS.

2021 Trading Levels – With SUE District Centre

11.19 Comparison goods turnovers at 2021 and estimated trade diversion from the SUE district centre are set out in Table 5 in Appendix 7. The estimated levels

of trade diversion have been based on existing shopping patterns identified in the RCLS, a review of the existing offer of the local and district centres and using our judgement.

- 11.20 The greatest level of trade diversion is forecast from Ipswich town centre, however the turnover of the town centre will still significantly increase from £486.60 million in 2010 to £697.72 million in 2021, even allowing for trade diversion to the proposed district centre.
- 11.21 Given the extremely limited comparison goods offer of the local centres within the catchment area, we do not forecast that any trade diversion will occur from these centres. A limited amount will be diverted from the district centres close to the catchment area, however the turnover of these centres in 2021 is still estimated to be higher than the 2010 turnover, and therefore any impact is considered to be negligible.
- 11.22 Expenditure growth will more than offset trade diversion to the district centre. These figures suggest there will be sufficient expenditure growth, over and above that needed to support the SUE district centre, to support future investment and improvements within the existing centres.
- 11.23 Again the impact figures suggest the proposed SUE district centre can assist in absorbing future expenditure growth, without compromising the Council's proposal to deliver significant additional retail floorspace in the Central Shopping Area.

Impact on Local Road Network

- 11.24 The assessment has also sought to quantify the likely impact of the proposed district centre on the local road network in general terms. This is based on an estimation of the retail turnover of the development, average spend per trip and the modal transport split, and we have applied the following assumptions:
- a a minimum average spend per trip: £20 (based on NLP's experience and survey data relating to average spend on visits to centres across the Country);
 - b total convenience and comparison turnover of district centre in 2021: £21 million;
 - c total number of shopping trips per year: 1.05 million ($b \div a$);
 - d total number of trips per week: 20,192 ($c \div 52$ weeks);
 - e proportion of trips undertaken by car: 80% within SUE, 95% for PCA, SCA and inflow (based on Ipswich Borough Council Retail & Commercial Leisure Study, 2010 household survey results and adjusted using judgement).
- 11.25 Table 11.1 applies the above assumptions to calculate the number of trips by car that will be generated by the SUE district centre.

Table 11.1: Trip Generation

	% of Trade Draw	Trips per week	% Car Journeys	Car Trips per Week
Northern Fringe Population	65%	13,125	80%	10,500
Primary Catchment Area	15%	3,029	95%	2,877
Secondary Catchment Area	15%	3,029	95%	2,877
Inflow	5%	1,010	95%	959
Total	100%	20,192		17,214

- 11.26 The majority of the car trips to the SUE district centre will be from residents within the proposed SUE. These are new trips generated by the residential development within the SUE. These shopping trips will be internal to the road network within the SUE development itself, and will not add to the existing local road network. In providing the district centre within the SUE, this will prevent adding new shopping car trips to the surrounding road network. In this respect, the proposed district centre is beneficial in terms of reducing the length of shopping trips.
- 11.27 Most of the remaining car trips are generated from residents within the primary and secondary catchment areas. These are existing shopping trips made in Ipswich that will be diverted to the SUE. The district centre will divert trips that are already occurring elsewhere on the local road network to existing retail facilities.
- 11.28 The above assessment is based on the assumption that Scenario 2A is implemented, as this is being used to inform the Council's SPD and reflects the number of dwellings expected to be delivered on the site. It is assumed that the district centre will be completed by 2021. In advance of the district centre being provided, the new residents in the earliest phases will temporarily add to the road network.
- 11.29 The above is an assessment of the likely impact of the proposed district centre on the local road network. A full highways impact assessment will be undertaken separately.

12.0

Conclusions

12.1

The Ipswich Core Strategy & Policies Development Plan Document, adopted in December 2011, identifies the sustainable urban extension (SUE) at the Northern Fringe site as forming the main supply of housing land in Ipswich after 2021.

12.2

This Study assesses the retail provision requirements to serve the SUE, considering the appropriate level of retail provision needed to serve both the proposed SUE, and meet the needs for additional retail provision in adjoining residential areas.

12.3

In undertaking this assessment, and in line with the Core Strategy, different housing scenarios have been considered, as follows:

- 1 **Scenarios 1A and 1B:** Core Strategy estimates of 1,000 (1A) and 1,500 (1B) new dwellings by 2021;
- 2 **Scenarios 2A and 2B:** higher estimates of 3,500 (2A) and 4,000 (2B) new dwellings by 2030; and
- 3 **Scenario 3:** maximum of 4,500 new dwellings by 2030.

12.4

Scenario 2A is being used to inform the Council's SPD as this reflects the number of dwellings expected to be delivered on the site.

12.5

Existing retail provision within the catchment area is very limited, with the principal food store provision being small Co-op stores in each of the local centres. There is currently a lack of choice in terms of operators within the local centres and the shops within the catchment area are predominantly small scale, older units. There is a lack of modern retail units that are likely to meet operator demand and consumer expectation. There are no district centres within the catchment area. Existing food shopping patterns are dominated by the large, out of centre food stores, particularly Morrison's at Sroughton Road, Sainsbury's at Hadleigh Road, and Asda at Goddard Road.

12.6

The proposed retail provision within the SUE will go some way to meeting the deficiencies in the existing retail provision in the surrounding residential areas, and will provide existing and proposed residents with increased choice in the provision of retail facilities, in a more sustainable location.

12.7

For Scenario 2A, we consider that the floorspace requirement should be met within one larger district centre, supported by two local centres. The district centre should include a medium-large foodstore of a sufficient size to attract customers and compete with large foodstores elsewhere, with a range of goods that will cater for full weekly shopping.

- 12.8 It is anticipated that the new district and local centres proposed as part of SUE development will fit into the retail hierarchy serving its local catchment, and complementing and subsidiary to Ipswich town centre.
- 12.9 Our retail capacity assessment indicates that under Scenario 2A, the proposed district centre could support a medium-large supermarket with convenience goods floorspace between approximately 960 and 1,500 sq.m net floorspace, plus an element of comparison goods floorspace, giving a total net sales area of between 1,070 and 1,660 sq.m. A floorspace range is given to reflect the different store operator format requirements. Such a store would secure an anchor trader for the SUE district centre, to ensure its delivery as a focal point and critical part of the community's development, whilst also remedying the deficiency in existing retail provision in the catchment area and creating more sustainable shopping patterns.
- 12.10 In addition, the district centre could support between 1,170 and 1,220 sq.m net comparison goods floorspace, a small number of additional convenience goods units (around 280 sq.m net) and 1,030 to 1,320 sq.m net complementary service uses (non-retail A1, A2, A3, A4 and A5).
- 12.11 An impact assessment of the proposed retail floorspace within the SUE on existing retail facilities and designated centres within the catchment area under Scenario 2A has been undertaken.
- 12.12 The assessment concludes that while there will be an impact on the existing convenience goods turnover of the local centres within the catchment area and the district centres close by, however we do not consider that the viability of any of the centres will be affected by this level of trade diversion. The greatest level of trade diversion is forecast from the superstores - Asda, Goddard Road, Sainsburys, Hadleigh Road and Morrisons, Sproughton Road. Even with the level of trade diversion forecast, these stores will continue to trade at a level above their 2010 turnover. These stores are therefore not expected to be adversely harmed by the district centre. Further, these stores are in out of centre locations and therefore not protected by planning policy.
- 12.13 In terms of comparison goods impact, expenditure growth will more than offset trade diversion to the district centre. These figures suggest there will be sufficient expenditure growth, over and above that needed to support the SUE district centre, to support future investment and improvements within the existing centres.
- 12.14 We therefore consider that the proposed district and local centres under Scenario 2A would be of an appropriate scale to serve the needs both the SUE and existing residents in the catchment area.

Appendix 1 Key Data Assumptions

Key Data Assumptions

Catchment Area

We have defined primary and secondary catchment areas for the proposed Northern Fringe sustainable urban extension (SUE), based on 1km and 2km distance rings from a central point within the SUE, as shown on the Plan in Appendix 2. The catchment areas have been defined to take into account the existing distribution of centres and retail facilities in the local area, recognising that shopping catchment areas will overlap.

Population

The existing population within the primary and secondary catchment areas has been obtained from Experian for 2010. We have applied the latest ONS 2010-based sub national population projections to the existing population within the catchment area, however we have adjusted the projections to take into account the proportion of population growth forecast in Ipswich Borough that will be provided within the SUE, in order to ensure that we do not “double count” any population growth as a result of the SUE. This ensures that we do not overestimate the future population within the catchment area.

For the SUE population, we have assumed an occupancy of 2.4 persons per dwelling.

The Report assumes that development of the SUE will be fully completed in 2030. A number of different scenarios for the housing numbers, mix and population breakdown are being tested. For the purposes of this assessment, we have tested the following scenarios, in order to forecast the minimum and maximum range of floorspace requirements to serve the SUE:

- **Scenarios 1A and 1B:** Core Strategy estimates of 1,000 (1A) and 1,500 (1B) new dwellings by 2021;
- **Scenarios 2A and 2B:** higher estimates of 3,500 (2A) and 4,000 (2B) new dwellings by 2030; and
- **Scenario 3:** maximum of 4,500 new dwellings by 2030.

Expenditure

Experian’s local consumer expenditure estimates for comparison and convenience goods for the primary and secondary catchment areas have been obtained. For the new population of the SUE, we have applied the national average figure for expenditure per capita. The latest available data is for 2010, in 2010 prices.

Data Assumptions

Growth Rates

Experian's EBS national expenditure information has been used to forecast expenditure in the short term (2010 to 2013). Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

For longer term projections Experian provide forecast growth rates and trend line projections. Experian's average annual growth forecast for the period 2014 to 2018 is 0.5% for convenience goods and 3% for comparison goods. The ultra long term trend line annual growth rates are 0.6% for convenience goods and 5.9% for comparison goods.

We believe the Experian's lower EBS growth forecast rates for 2010 to 2013 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.3% for 2010-2011, -0.4% for 2011-2012 and 0.5% for 2012 to 2013; for comparison goods: 0.5% for 2010-2011, 1.6% for 2011-2012 and 2.1% for 2012-2013). In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth forecasts (0.5% for convenience goods and 3% for comparison goods) are relatively cautious based on past growth rates and these have been adopted after 2013 in this assessment. These growth figures relate to real growth and exclude inflation.

Special Forms of Trading (SFT)

Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops eg. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian information suggests that non-store retail sales in 2010 is:

- 7.4% of convenience goods expenditure; and
- 11.7% of comparison goods expenditure.

Experian predicts that these figures will increase in the future.

Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales

through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace.

The adjusted figures suggest that SFT sales in 2010 is:

- 3.7% of convenience goods expenditure; and
- 8.8% of comparison goods expenditure.

The projections provided by Experian suggest that these percentages could increase to 5.9% and 12.7% by 2016.

Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. This report makes an allowance for future growth in e-tailing based on Experian projections. On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a small percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2016/17. Experian's September 2011 figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

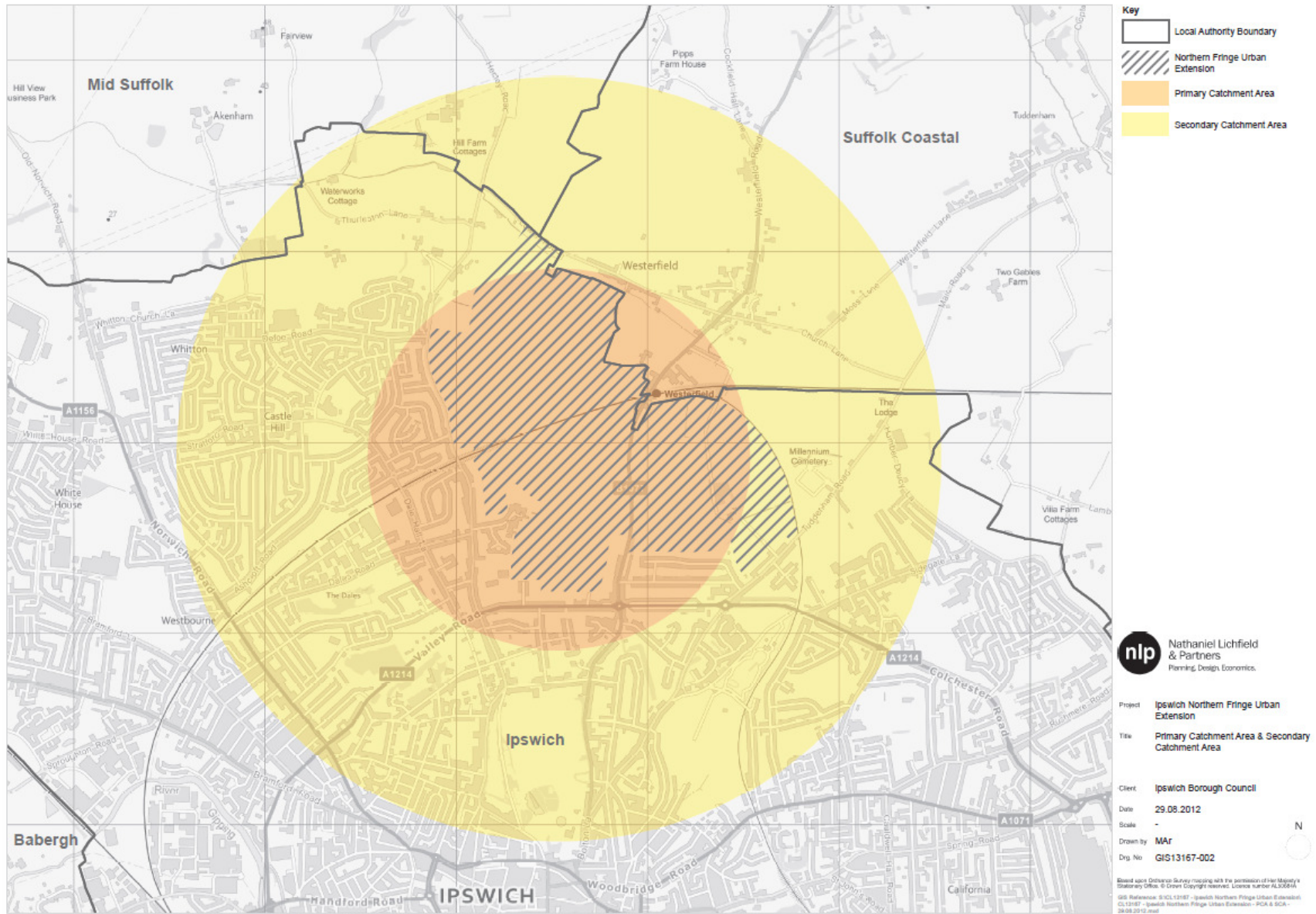
Growth in Turnover Efficiency

The potential for existing convenience floorspace to increase its turnover efficiency in real terms in the future has been considered. Retail studies should assess the potential for existing floorspace to increase its productivity in the future. Historically limited or no growth in turnover density has been assumed by most retail planners for convenience floorspace. Experian suggest there could be a reduction in convenience efficiency in the short term, then 0.4% per annum growth is recommended between 2014 to 2018 and 0.2% thereafter (Source: Experian Retail Planner Briefing September 2011). The reduction in turnover efficiency in the short term is expected to cancel out longer term growth, therefore no change in convenience goods turnover efficiency is assumed in this study.

Recent information provided by Experian (September 2011) recommends turnover efficiency growth of 1.7% per annum for the period after 2013, in line with the post economic recovery expenditure growth rates. We have assumed no growth in turnover efficiency in the short term up to 2013, reflecting Experian's lower expenditure growth forecasts (an average of 1.4% per annum).

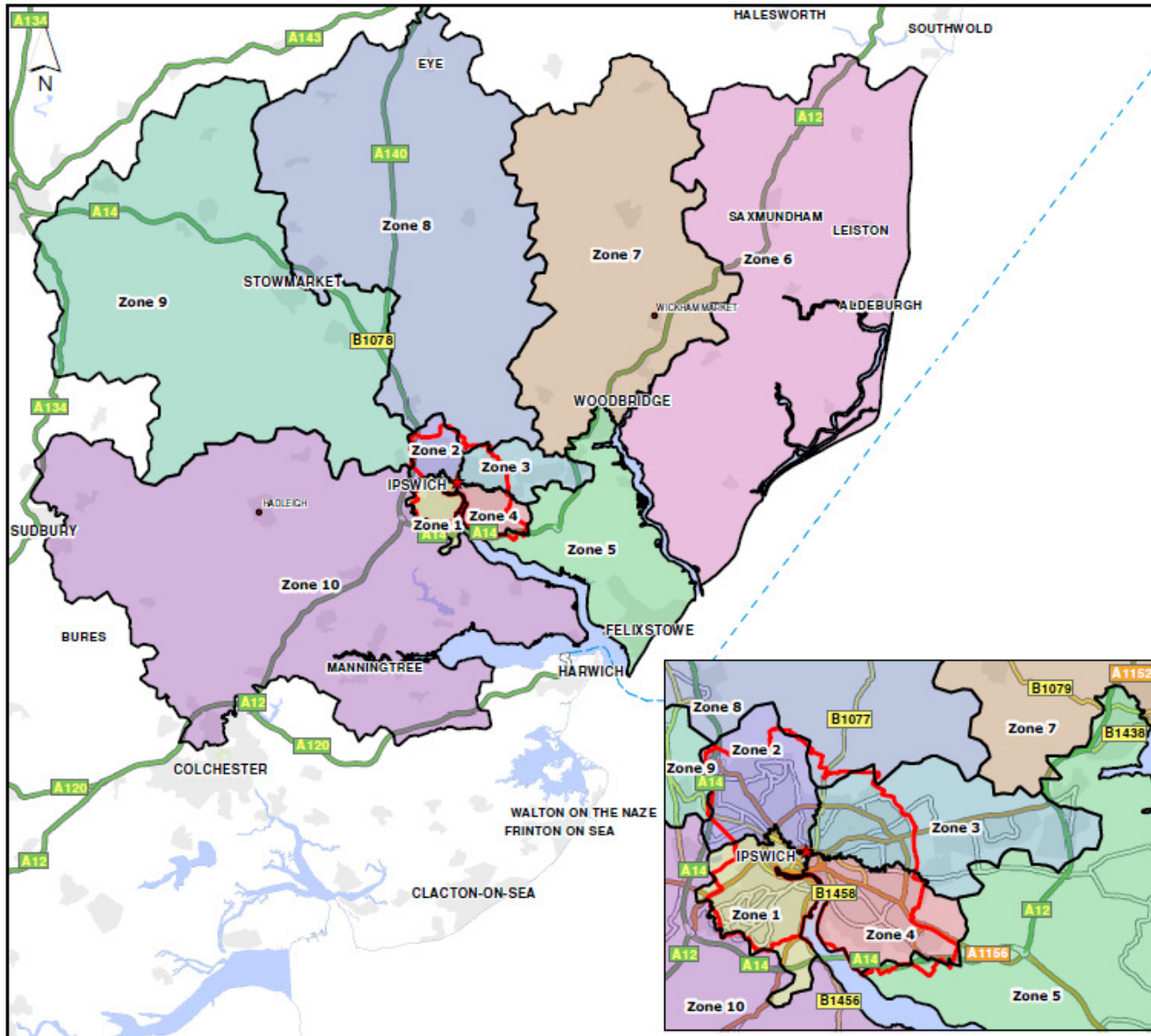
Appendix 2 Catchment Area

Assessment of Retail Requirements : Northern Fringe, Ipswich



Appendix 3

Ipswich Borough Council Retail & Commercial Leisure Study 2010 Study Area Plan



IPSWICH BOROUGH COUNCIL

- ★ IP1 3BB
- Ipswich Borough

Retail Catchment Zones

	Population
Zone 1	34,611
Zone 2	30,818
Zone 3	47,256
Zone 4	34,174
Zone 5	39,542
Zone 6	31,510
Zone 7	25,862
Zone 8	33,259
Zone 9	56,135
Zone 10	83,317



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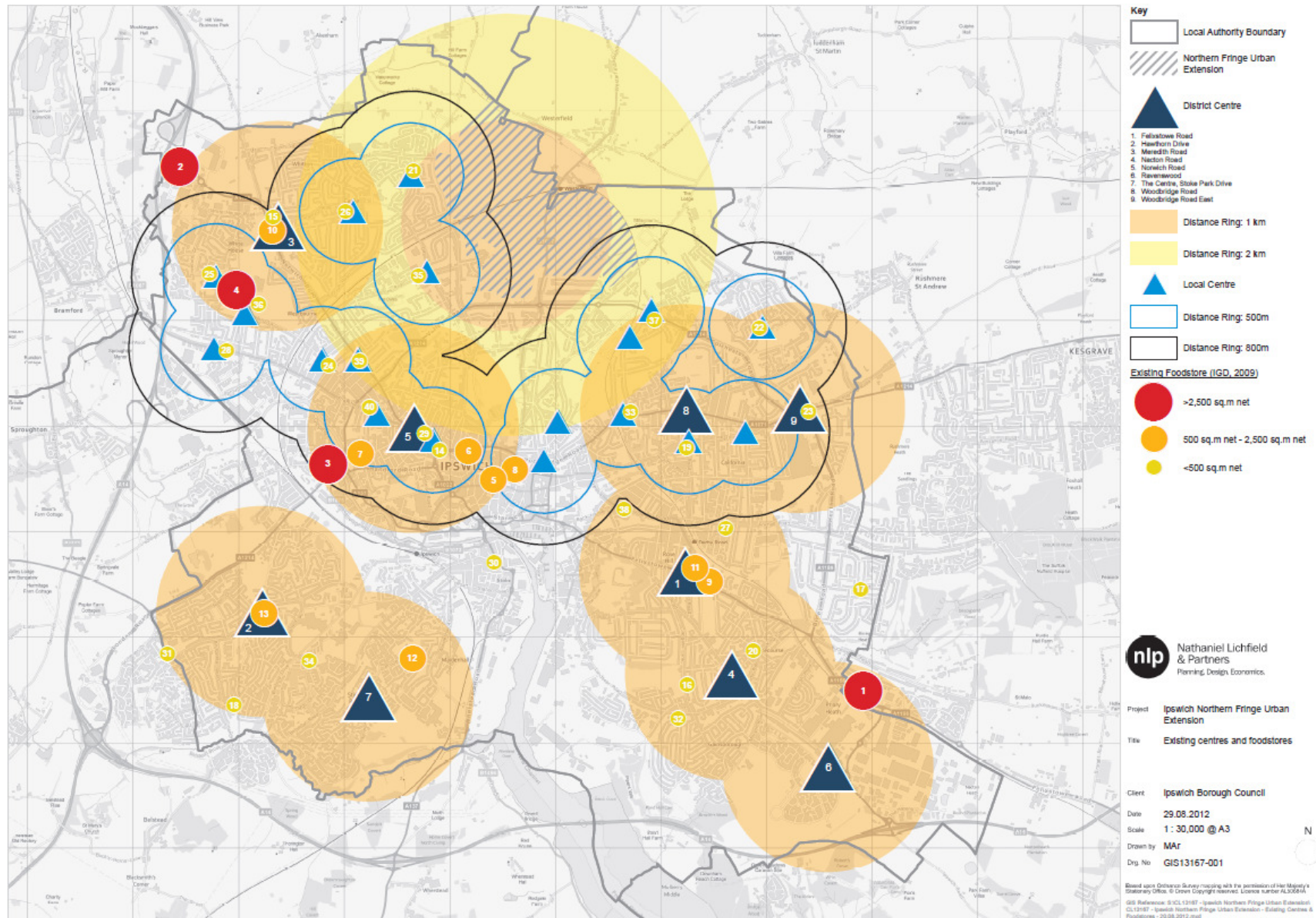
**Retail Catchment Zones
 & Borough Boundary**

Not to scale - March 2010

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Appendix 4 Plan Showing Existing Retail Facilities

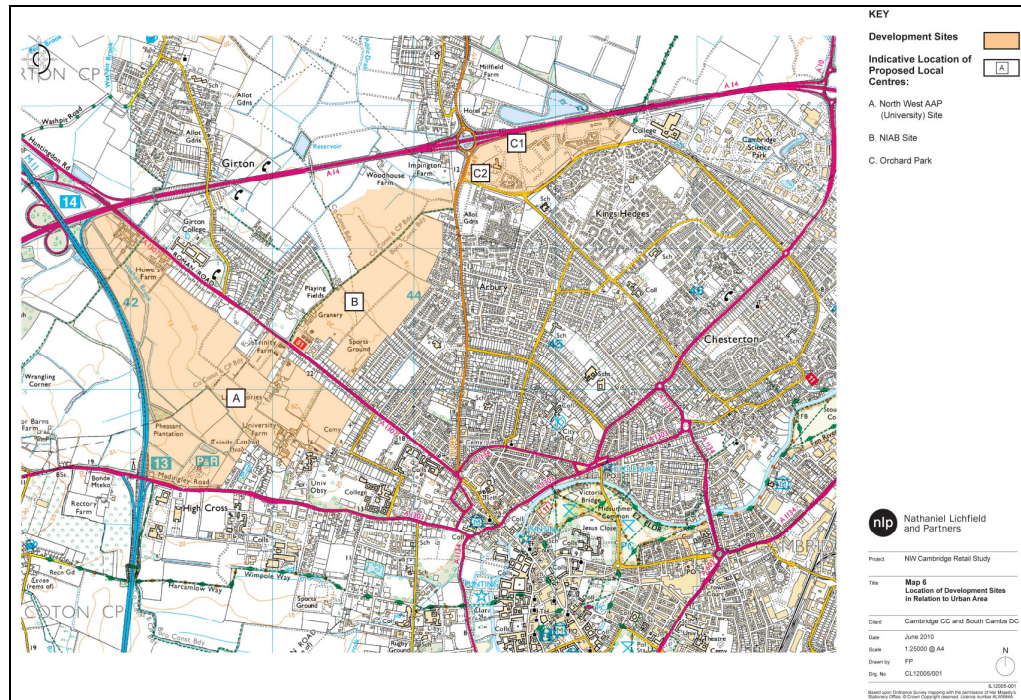
Assessment of Retail Requirements : Northern Fringe, Ipswich



Appendix 5 Comparable Urban Expansion/ New Settlement Schemes

Comparable Urban Expansion/New Settlement Schemes

North West Cambridge Urban Expansion



The North West Cambridge Supplementary Retail Study (NLP, 2010) provided a detailed retail planning evidence base for future expansion in north-west Cambridge. The study identified retail capacity for two to three new local centres up to 2021. The sites in question, known as the University site, NIAB and Orchard Park, are all subject to recent development proposals and planning applications.

A planning application for the University site submitted in September 2011 proposed 1,500 homes for its key workers, accommodation for 2,000 postgraduate students, 1,500 homes for sale, education uses, conference centre and up to 5,300 sq.m. gross retail floorspace (Use Classes A1 to A5) (including a 2,000 sq.m. supermarket). The NIAB site has also been subject to applications for housing development and the inclusion of a local centre. The Orchard Park scheme secured outline permission for 900 new home in 2005, further applications have secured other parcels of land for housing development and also a local centre incorporating 807 sq.m net convenience floorspace.

Cambourne, Cambridgeshire

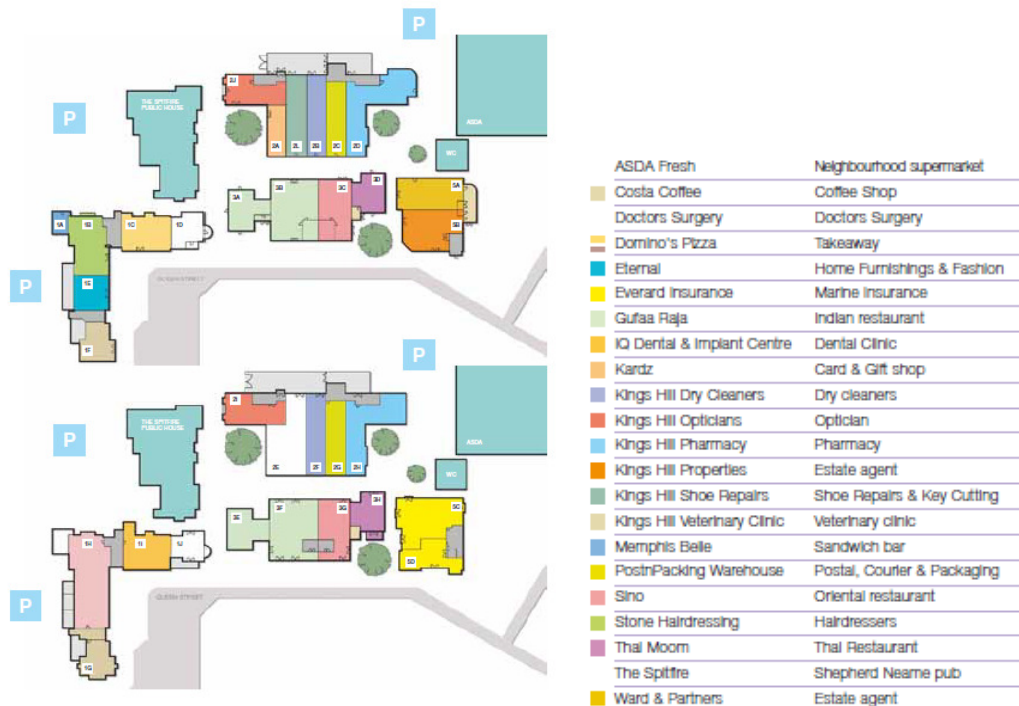


Part of the new community developed at Cambourne, approximately nine miles from Cambridge, comprising 3,300 new homes and a 50,000sq.m Business Park. 'Supermarket anchored' by a Morrison's (3,000 sq.m net and 500 car parking spaces) and there is an adjoining High Street with a number of retail units.

Community uses include health centre/library (co-located), police station, fire station, church, community hall and nursery. The high street includes three take away outlets, several estate agents, a bookmaker, a Building Society branch, a dry cleaner, a bicycle shop, a coffee shop, restaurant and a Pharmacy with a Post Office counter. There is also now a pub and space for six further retail units.

King's Hill, Kent

A former airfield near West Malling, King's Hill comprises approx. 2,700 new homes and 80,000 sq.m of business space (including Tonbridge and Malling's offices). The district centre is 'supermarket anchored' ASDA which was built in advance (2,387 sq.m net and 450 parking spaces) and is arranged in a conventional format. However, adjoining the ASDA is the district centre with 20 units arranged in 4 two storey buildings fronting a pedestrian square with mature trees. One of the ASDA entrances also fronts on to the square. Various community uses including community hall, school and a clinic are set further back but are within easy walking distance. Many of the residential neighbourhoods are also only a short walk from the district centre.



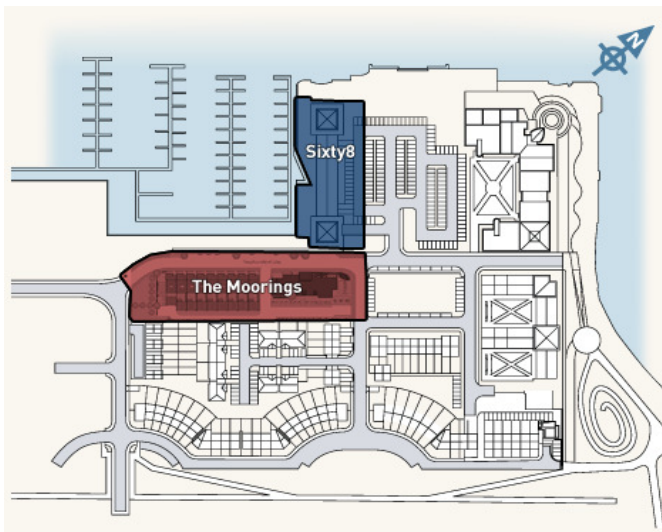
Liberty Square District Centre:

- Total Floor Space: 8,850 sq.m
- Total Number of Units: 21
- Total number of Convenience units: 1
- Other A1-A5 Units: 17
- Total Floor Space of Convenience Units: 5,550 sq.m
- Total Floor Space of A1-A5: 3,300 sq.m
- Other Facilities: Doctors Surgery, Dental Clinic, Vets

Port Marine, Portishead



Part of the award winning Port Marina development (approx 3,400 new homes) at Portishead harbour side. This includes a Waitrose (2500 sq.m net with 250 space car park) and a number of other small commercial and retail units, opposite a new leisure centre. Other uses may follow on adjoining sites.

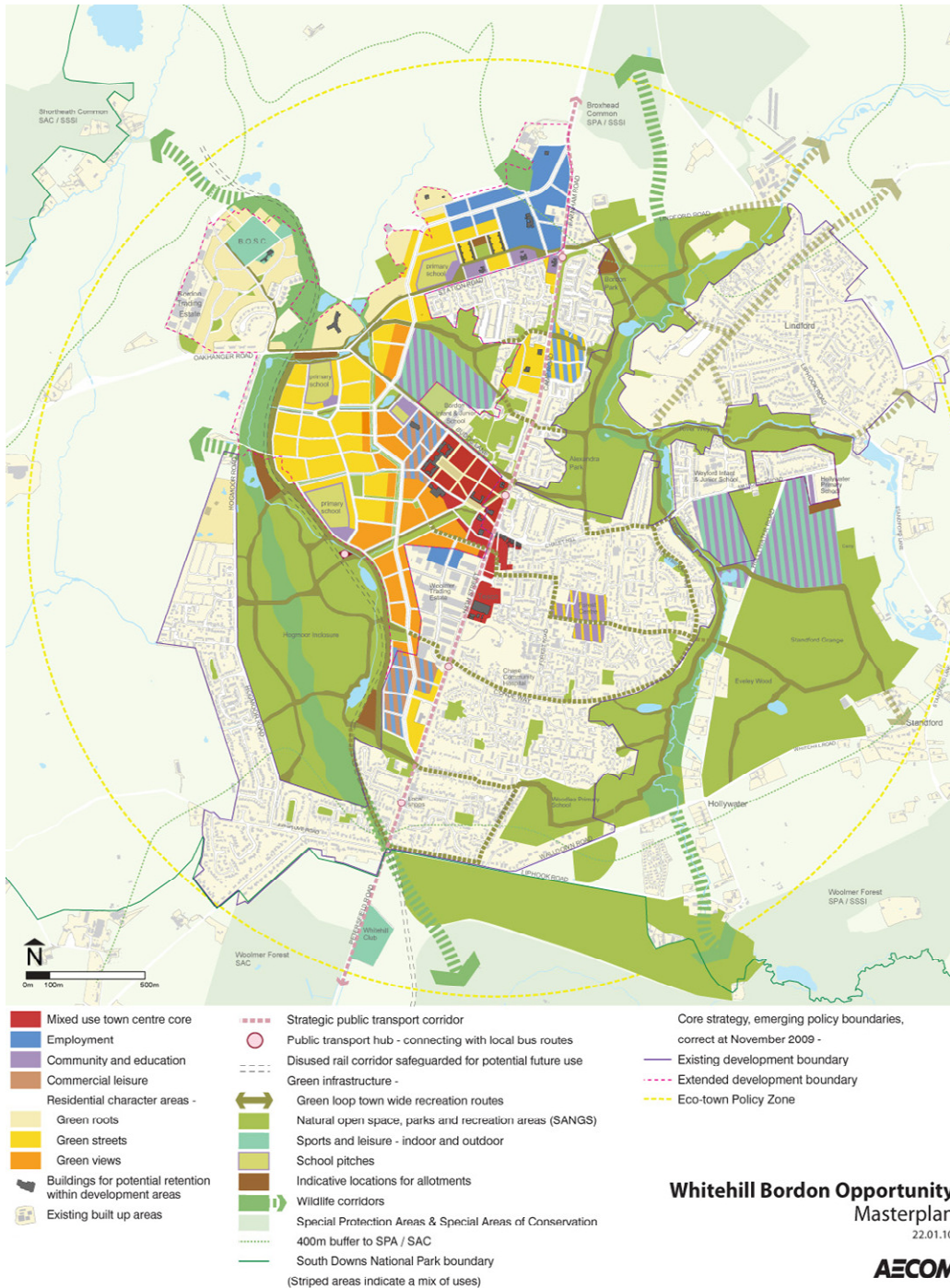


Buckshaw Village New Town, Chorley



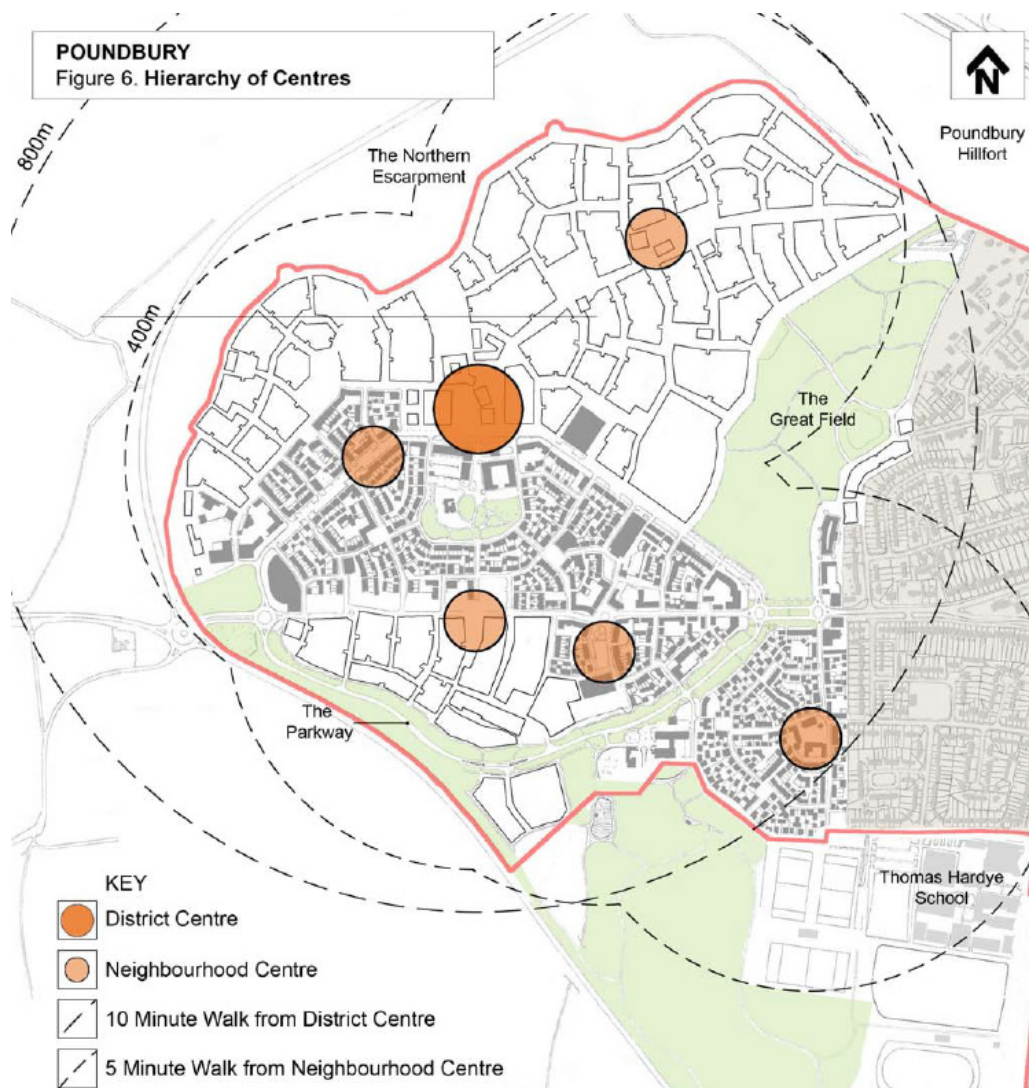
This new settlement has been under construction since the mid-2000s, with permissions totalling 4,120 new homes as well as large scale industrial floorspace. A proposed local centre to serve the estimated future population (approximately 10,000) includes retail capacity for a foodstore of 3,250 sq.m gross floorspace, assuming 75% retention rates for food shopping within the village and 20% from the remainder of the catchment area (Retail Statement, Steven Abbot Associates. 2008). An additional 700 sq.m gross A1 floorspace is also included. For non-food floorspace, it is assumed that 15% of expenditure will be retained by the new population, and 1% in the remainder of the catchment.

Whitehill Bordon Eco Town, Hampshire



Another designation from the first round of eco towns, the recently updated Whitehill Bordon masterplan includes 4,000 new homes by 2026 (estimated population of 9,413), and identifies retail capacity for an additional 1,269 sq.m net convenience goods floorspace and 13,255 sq.m net comparison goods floorspace. The retail capacity assessment estimates a 48% retention rate for food and 30% for non-food spending (Retail Assessment, NLP, 2011).

Poundbury Urban Expansion, Dorset



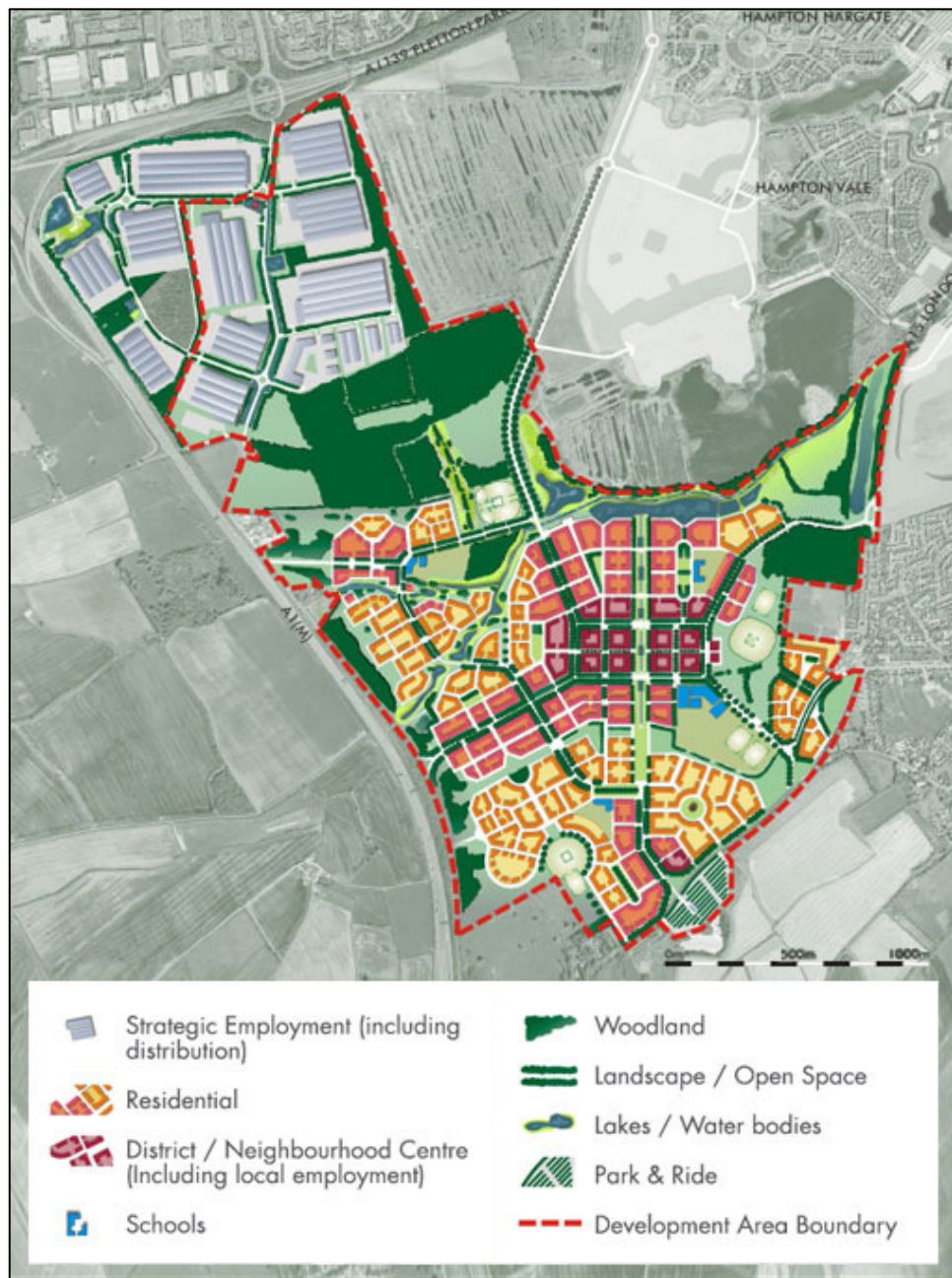
The Duchy of Cornwall’s urban extension to the market town of Dorchester is a partially built scheme of 2,200 homes. The Development Brief notes that the provision of a district centre within Poundbury will allow the concentration of shops, services and facilities intended to meet the needs of the whole of the Poundbury population where they are most accessible.

Phase 1 of the development has been built out and includes a Budgens convenience store (557 sq.m net) together with a range of shops and cafés. This represents one of the neighbourhood centres supporting a small allocation of 250 residential units.

Phase 2 is under construction for approx. 900 dwellings and includes a district centre (also under construction) - Queen Mother Square. Pummery Square is the ‘hub’ of phase 1 with a network of roads and alleys emanating from a Pedestrian Square used for markets. It includes a small grocers, café, clinic,

small shops/services and community hall. Queen Mother Square will be a larger ensemble of businesses and commercial premises arranged in a large urban square. A small supermarket (Waitrose) opened in 2011 with undercroft parking for offices.

Great Haddon Urban Extension, Peterborough



An urban extension scheme of 5,300 dwellings is proposed, containing one district centre and two neighbourhood centres. The retail capacity assessment and planning application assumes that there will be a 4,200 sq.m gross (2,940 sq.m net) food store in the district centre, together with a range of smaller units for shops, services, restaurants, cafés and other A1-A5 uses, together with community facilities and other commercial uses. The two neighbourhood centres will include smaller scale retail facilities, each anchored by a small convenience store of up to 450 sq.m gross, primarily catering for top-up

shopping and other local needs (Great Haddon Urban Expansion Area, Retail Impact Assessment, King Sturge 2011).

The report notes that in order to be successful in planning terms, the retail offer in the proposed district centre must have sufficient critical mass and be of an appropriate mix to meet the needs and expectations of the future community. If the retail provision is insufficient and cannot compete with the retail offer elsewhere then it will fail as a vital and viable centre to the detriment of the local community. The intention is therefore to deliver the foodstore, the key retail element of the district centre, as early as is practical within Great Haddon’s development phase in order to meet local needs and establish sustainable patterns of activity. Towards the latter phases of Great Haddon’s development process the two neighbourhood centres will be introduced. The table below sets out the proposed floorspace for the centres.

Table A: Proposed Floorspace in Gross Square Metres

Centre	Uses	Proposed Floorspace (square metres gross)			Total
		Convenience A1	Comparison A1	Other** A1 – A5	
District Centre	Supermarket, butcher, baker, fishmonger, greengrocer, pet store, clothing store, hardware shop, chemist, electrical shop, bicycle shop, off-licence, newsagent, hairdressers, dry cleaners, hot food takeaway, café, restaurant, pub/bar, estate agents, bank...	3,700 foodstore)*	500 (foodstore)*	3,500†	4,200 (foodstore)*
		500†	1000†		5,000
					Total 9,200
Neighbourhood Centre x 2	Small convenience food store to meet ‘top-up’ shopping requirements, off-licence, butcher, chemist, baker, café, hot food takeaway, dry cleaner...	550† each (of which the convenience shop comprise up to 450 each)	100† each	500† each	1,150† each 2,300† total
TOTAL		5,300†	1,700†	4,500†	11,500

* For foodstores the net retail sales area defined by PPS4 comprises: the sales area within the building (i.e. all internal areas accessible to the customer), but excluding checkouts, lobbies, concessions, restaurants, customer toilets and walkways behind the checkouts.

**Other A1 to A5 constitutes A1 services uses (such as hairdressers and post offices), A2 uses (Financial and Professional Services), A3 (Restaurants and Cafes), A4 (Drinking Establishments), and A5 (Hot Food Takeaways).

† Indicative areas which may be subject to change to reflect local requirements and market conditions at the time of opening.

Appendix 6 Convenience Impact Tables

TABLE 1: BASE YEAR 2010 CONVENIENCE GOODS TURNOVER (£M)

Centre/Store	Turnover (£m)
Within Catchment Area:	
Fircroft Road Local Centre	2.29
Garrick Way Local Centre	2.18
Dale Hall Lane/Dales Road Local Centre	1.48
Norwich Road Local Centre	1.00
Colchester Road Local Centre	0.98
Catchment Area Sub-Total	7.93
Outside Catchment Area:	
Meredith Road District Centre	8.72
Norwich Road District Centre	3.38
Woodbridge Road District Centre	1.55
Asda, Goddard Road	43.50
Sainsburys, Hadleigh Road	39.70
Morrisons, Sproughton Road	58.20
Ipswich Town Centre	16.00
Total	178.98

*Notes:**Benchmark turnover estimated for local/district centres**Actual turnover figures for out of centre stores and Ipswich Town Centre taken from Ipswich Borough Council Retail & Commercial Leisure Study, 2010*

TABLE 2: CONVENIENCE GOODS COMMITMENTS

Scheme	sq.m net	% convenience	convenience sq.m net	£ per sq.m	Turnover (£m)
Tesco Extra, Grafton Way	5,340	60%	3,204	£12,432	39.83
Waitrose, Nacton Road	2,294	90%	2,065	£11,475	23.69
Westgate Centre			1,625	£12,500	20.31
Norsk Hydro Site - foodstore	2,520	80%	2,016	£12,500	25.20
Total	10,154		8,910		109.04

Notes:

Estimated % split of convenience/comparison goods sales area

Tesco Extra, Grafton Way - revised scheme (12/00639/FUL)

Waitrose, Nacton Road (11/00763/OUT)

Westgate Centre (08/00806/FUL) - estimated convenience floorspace from Ipswich Borough Council Retail & Commercial Leisure Study, 2010

Norsk Hydro Site - foodstore 3,600 sq.m gross, 70% net sales area estimated (11/00865/CLD)

TABLE 3: DESIGN YEAR 2021 CONVENIENCE GOODS TURNOVER (£M)

Centre/Store	Turnover (£m)
Within Catchment Area:	
Fircroft Road Local Centre	2.29
Garrick Way Local Centre	2.18
Dale Hall Lane/Dales Road Local Centre	1.48
Norwich Road Local Centre	1.00
Colchester Road Local Centre	0.98
Catchment Area Sub-Total	7.93
Outside Catchment Area:	
Meredith Road District Centre	8.72
Norwich Road District Centre	3.38
Woodbridge Road District Centre	1.55
Asda, Goddard Road	51.60
Sainsburys, Hadleigh Road	47.30
Morrisons, Sroughton Road	69.10
Ipswich Town Centre	19.20
Commitments:	
Tesco Extra, Grafton Way	39.83
Waitrose, Nacton Road	23.69
Westgate Centre	20.31
Norsk Hydro Site	25.20
Total	317.82

Notes:

*Benchmark turnover estimated for local/district centres - no growth in turnover efficiency
Actual turnover figures for out of centre stores and Ipswich Town Centre taken from
Ipswich Borough Council Retail & Commercial Leisure Study, 2010*

TABLE 4: CONVENIENCE GOODS TURNOVER OF SUE DISTRICT CENTRE

	sq.m net	% convenience	convenience sq.m net	£ per sq.m	Turnover (£m)
Large Convenience Store	1,065	90%	959	£12,500	11.98
Small Convenience Units	300	100%	300	£4,000	1.20
Total	1,365		1,259		13.18

TABLE 5: CONVENIENCE GOODS TURNOVER AND TRADE DIVERSION OF SUE DISTRICT CENTRE, 2021 (£M)

Centre/Store	Turnover (£m)	Trade Diversion (%)	Trade Diversion (£m)	Residual Turnover (£m)
SUE DISTRICT CENTRE	13.18	n/a	n/a	13.18
Within Catchment Area:				
Fircroft Road Local Centre	2.29	2.0%	0.26	2.02
Garrick Way Local Centre	2.18	1.0%	0.13	2.05
Dale Hall Lane/Dales Road Local Centre	1.48	1.0%	0.13	1.35
Norwich Road Local Centre	1.00	0.5%	0.07	0.93
Colchester Road Local Centre	0.98	0.5%	0.07	0.91
Catchment Area Sub-Total	7.93	5.0%	0.66	7.27
Outside Catchment Area:				
Meredith Road District Centre	8.72	7.5%	0.99	7.73
Norwich Road District Centre	3.38	2.0%	0.26	3.12
Woodbridge Road District Centre	1.55	1.0%	0.13	1.42
Asda, Goddard Road	51.60	12.5%	1.65	49.95
Sainsburys, Hadleigh Road	47.30	12.5%	1.65	45.65
Morrisons, Sproughton Road	69.10	20.0%	2.64	66.46
Ipswich Town Centre	19.20	5.5%	0.72	18.48
Commitments:				
Tesco Extra, Grafton Way	39.83	12.0%	1.58	38.25
Waitrose, Nacton Road	23.69	8.0%	1.05	22.64
Westgate Centre	20.31	2.0%	0.26	20.05
Norsk Hydro Site	25.20	2.0%	0.26	24.94
Other Local Centres	n/a	5.0%	0.66	n/a
Other Outside Catchment Area	n/a	5.0%	0.66	n/a
Total	317.82	100.0%	13.18	

TABLE 6: SUE DISTRICT CENTRE CONVENIENCE GOODS IMPACT SUMMARY

Centre/Store	Turnover 2010 (£m)	Turnover 2021 without SUE (£m)	Turnover 2021 with SUE (£m)	Cumulative Impact on 2010 Trading
SUE DISTRICT CENTRE	n/a	n/a	13.18	n/a
Within Catchment Area:				
Fircroft Road Local Centre	2.29	2.29	2.02	-11.5%
Garrick Way Local Centre	2.18	2.18	2.05	-6.0%
Dale Hall Lane/Dales Road Local Centre	1.48	1.48	1.35	-8.9%
Norwich Road Local Centre	1.00	1.00	0.93	-6.6%
Colchester Road Local Centre	0.98	0.98	0.91	-6.7%
Catchment Area Sub-Total	7.93	7.93	7.27	-8.3%
Outside Catchment Area:				
Meredith Road District Centre	8.72	8.72	7.73	-11.3%
Norwich Road District Centre	3.38	3.38	3.12	-7.8%
Woodbridge Road District Centre	1.55	1.55	1.42	-8.5%
Asda, Goddard Road	43.50	51.60	49.95	14.8%
Sainsburys, Hadleigh Road	39.70	47.30	45.65	15.0%
Morrisons, Sproughton Road	58.20	69.10	66.46	14.2%
Ipswich Town Centre	16.00	19.20	18.48	15.5%
Commitments:				
Tesco Extra, Grafton Way	n/a	39.83	38.25	-4.0%
Waitrose, Nacton Road	n/a	23.69	22.64	-4.5%
Westgate Centre	n/a	20.31	20.05	-1.3%
Norsk Hydro Site	n/a	25.20	24.94	-1.0%
Total	178.98	317.82	319.13	

Note: Impact on commitments is not cumulative

Appendix 7 Comparison Impact Tables

TABLE 1: BASE YEAR 2010 COMPARISON GOODS TURNOVER (£M)

Centre/Store	Turnover (£m)
Within Catchment Area:	
Fircroft Road Local Centre	0.16
Garrick Way Local Centre	0.32
Dale Hall Lane/Dales Road Local Centre	0.16
Norwich Road Local Centre	0.48
Colchester Road Local Centre	0.16
Catchment Area Sub-Total	1.28
Outside Catchment Area:	
Meredith Road District Centre	1.09
Norwich Road District Centre	8.75
Woodbridge Road District Centre	1.02
Asda, Goddard Road	14.24
Sainsburys, Hadleigh Road	6.65
Morrisons, Sroughton Road	3.58
Ipswich Town Centre	486.60
Total	523.22

Notes:

*Benchmark turnover estimated for local/district centres and out of centre foodstores
Actual turnover figures for Ipswich Town Centre taken from Ipswich Borough Council
Retail & Commercial Leisure Study, 2010*

TABLE 2: COMPARISON GOODS COMMITMENTS

Scheme	sq.m net	% comparison	comparison sq.m net	£ per sq.m	Turnover (£m)
Tesco Extra, Grafton Way	5,340	40%	2,136	£10,271	21.94
Grafton Way - non-food units (max)			1,719	£5,300	9.11
Waitrose, Nacton Road	2,294	10%	229	£12,509	2.87
John Lewis Home, Nacton Road			3,971	£9,437	37.47
Bulky goods units, Nacton Road			5,798	£4,500	26.09
Westgate Centre			8,078	£5,300	42.81
Norsk Hydro Site - foodstore	2,520	20%	504	£12,250	6.17
Norsk Hydro Site - non-food			1,880	£5,300	9.96
Total	10,154		24,315		156.43

Notes:

Estimated % split of convenience/comparison goods sales area

Tesco Extra, Grafton Way - revised scheme (12/00639/FUL)

Waitrose, John Lewis & bulky goods unit, Nacton Road (11/00763/OUT)

Bulky goods unit, Nacton Road - amended and sub-divided (12/00615/FUL)

Westgate Centre (08/00806/FUL) - estimated comparison floorspace from Ipswich Borough Council Retail & Commercial Leisure Study, 2010

Norsk Hydro Site - foodstore 3,600 sq.m gross, 70% net sales area estimated (11/00865/CLD)

Norsk Hydro Site - non-food 2,508 sq.m gross, 75% net sales area estimated (11/00865/CLD)

TABLE 3: DESIGN YEAR 2021 COMPARISON GOODS TURNOVER (£M)

Centre/Store	Turnover (£m)
Within Catchment Area:	
Fircroft Road Local Centre	0.18
Garrick Way Local Centre	0.37
Dale Hall Lane/Dales Road Local Centre	0.18
Norwich Road Local Centre	0.55
Colchester Road Local Centre	0.18
Catchment Area Sub-Total	1.46
Outside Catchment Area:	
Meredith Road District Centre	1.25
Norwich Road District Centre	10.02
Woodbridge Road District Centre	1.17
Asda, Goddard Road	16.30
Sainsburys, Hadleigh Road	7.61
Morrisons, Sproughton Road	4.10
Ipswich Town Centre	701.20
Commitments:	
Tesco Extra, Grafton Way	21.94
Grafton Way - non-food units (max)	9.11
Waitrose, Nacton Road	2.87
John Lewis Home, Nacton Road	37.47
Bulky goods units, Nacton Road	26.09
Westgate Centre	42.81
Norsk Hydro Site - foodstore	6.17
Norsk Hydro Site - non-food	9.96
Total	899.54

Notes:

Benchmark turnover estimated for local/district centres - growth in turnover efficiency of 1.8% per annum

Actual turnover figures for out of centre stores and Ipswich Town Centre from Ipswich Borough Council Retail & Commercial Leisure Study, 2010

TABLE 4: COMPARISON GOODS TURNOVER OF SUE DISTRICT CENTRE

	sq.m net	% comparison	comparison sq.m net	£ per sq.m	Turnover (£m)
Large Convenience Store	1,065	10%	107	£12,250	1.30
Comparison Units	1,215	100%	1,215	£5,300	6.44
Total	2,280		1,322		7.74

TABLE 5: COMPARISON GOODS TURNOVER AND TRADE DIVERSION OF SUE DISTRICT CENTRE, 2021 (£M)

Centre/Store	Turnover (£m)	Trade Diversion (%)	Trade Diversion (£m)	Residual Turnover (£m)
SUE DISTRICT CENTRE	7.74	n/a	n/a	7.74
Within Catchment Area:				
Fircroft Road Local Centre	0.18	0.0%	0.00	0.18
Garrick Way Local Centre	0.37	0.0%	0.00	0.37
Dale Hall Lane/Dales Road Local Centre	0.18	0.0%	0.00	0.18
Norwich Road Local Centre	0.55	0.0%	0.00	0.55
Colchester Road Local Centre	0.18	0.0%	0.00	0.18
Catchment Area Sub-Total	1.46	0.0%	0.00	1.46
Outside Catchment Area:				
Meredith Road District Centre	1.25	1.0%	0.08	1.17
Norwich Road District Centre	10.02	1.0%	0.08	9.94
Woodbridge Road District Centre	1.17	0.5%	0.04	1.13
Asda, Goddard Road	16.30	5.0%	0.39	15.91
Sainsburys, Hadleigh Road	7.61	5.0%	0.39	7.23
Morrisons, Sproughton Road	4.10	5.0%	0.39	3.71
Ipswich Town Centre	701.20	45.0%	3.48	697.72
Commitments:				
Tesco Extra, Grafton Way	21.94	5.0%	0.39	21.55
Grafton Way - non-food units (max)	9.11	1.0%	0.08	9.03
Waitrose, Nacton Road	2.87	0.5%	0.04	2.83
John Lewis Home, Nacton Road	37.47	2.0%	0.15	37.32
Bulky goods units, Nacton Road	26.09	0.0%	0.00	26.09
Westgate Centre	42.81	1.0%	0.08	42.74
Norsk Hydro Site - foodstore	6.17	0.0%	0.00	6.17
Norsk Hydro Site - non-food	9.96	0.0%	0.00	9.96
Other Local Centres	n/a	0.0%	0.00	n/a
Other Outside Catchment Area	n/a	28.0%	2.17	n/a
Total	899.54	100.0%	7.74	

TABLE 6: SUE DISTRICT CENTRE COMPARISON GOODS IMPACT SUMMARY

Centre/Store	Turnover 2010 (£m)	Turnover 2021 without SUE (£m)	Turnover 2021 with SUE (£m)	Cumulative Impact on 2010 Trading
SUE DISTRICT CENTRE	n/a	n/a	7.74	n/a
Within Catchment Area:				
Fircroft Road Local Centre	0.16	0.18	0.18	14.4%
Garrick Way Local Centre	0.32	0.37	0.37	14.4%
Dale Hall Lane/Dales Road Local Centre	0.16	0.18	0.18	14.4%
Norwich Road Local Centre	0.48	0.55	0.55	14.4%
Colchester Road Local Centre	0.16	0.18	0.18	14.4%
Catchment Area Sub-Total	1.28	1.46	1.46	14.4%
Outside Catchment Area:				
Meredith Road District Centre	1.09	1.25	1.17	7.3%
Norwich Road District Centre	8.75	10.02	9.94	13.6%
Woodbridge Road District Centre	1.02	1.17	1.13	10.6%
Asda, Goddard Road	14.24	16.30	15.91	11.7%
Sainsburys, Hadleigh Road	6.65	7.61	7.23	8.6%
Morrisons, Sproughton Road	3.58	4.10	3.71	3.6%
Ipswich Town Centre	486.60	701.20	697.72	43.4%
Commitments:				
Tesco Extra, Grafton Way	n/a	21.94	21.55	-1.8%
Grafton Way - non-food units (max)	n/a	9.11	9.03	-0.9%
Waitrose, Nacton Road	n/a	2.87	2.83	-1.3%
John Lewis Home, Nacton Road	n/a	37.47	37.32	-0.4%
Bulky goods units, Nacton Road	n/a	26.09	26.09	0.0%
Westgate Centre	n/a	42.81	42.74	-0.2%
Norsk Hydro Site - foodstore	n/a	6.17	6.17	0.0%
Norsk Hydro Site - non-food	n/a	9.96	9.96	0.0%
Total	523.22	899.54	901.70	

Note: Impact on commitments is not cumulative



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