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Greater Norwich: Town Centres & Retail Study

Final Report, October 2017

Volume 1: Main Report

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Volume 2 — Study area & market share plans

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Volume 4 — Household telephone survey results (NEMS Market Research)

Report version: **Final Report**
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Date: **October 2017**

For and on behalf of GVA Grimley Limited

1. Introduction

- 1.1 GVA have been commissioned to undertake an **Employment, Retail and Town Centre Study** on behalf of the three local authorities (Broadland District Council, Norwich City Council and South Norfolk Council) and Norfolk County Council that make up the **Greater Norwich Development Partnership (GNDP)**.
- 1.2 The GNDP authorities have agreed to work together to prepare the emerging Greater Norwich Local Plan (GNLP), to guide the future development of the Greater Norwich area over the period to 2036. This strategic approach to planning for future development and growth builds on long-established joint working arrangements for Greater Norwich by the GNDP; the same working arrangements delivered the current Joint Core Strategy (JCS), which guides development in the Greater Norwich area to 2026. GVA prepared the 'Norwich Sub-Region: Retail and Town Centres Study' in October 2007 (referred to throughout this report as 'The 2007 Study'), the retail and town evidence base study which informed the policies and strategic approach to retail and town centre development set in the JCS. This study acts as an update to the 2007 Study.
- 1.3 The JCS identifies that the Norwich urban area has a population of approximately 200,000 people, and holds assets of international importance including its heritage, natural environment and a growing knowledge economy. Norwich City is recognised by the JCS as a major regional economic driver and visitor destination providing a hub for employment, tourism and culture and educational activity. Norwich is also recognised by the JCS as the region's highest ranking retail centre, and accordingly the city centre has an important influence over the shopping patterns of residents across the GNDP area and further afield.
- 1.4 The overall purpose of the study is to identify the future needs and opportunities for retail, office, industrial and warehousing floorspace across the three local authority areas. This report specifically focuses on identifying the future requirements in respect of **retail needs**, and sets out a strategy for how these requirements should be addressed by through the emerging Greater Norwich Local Plan (GNLP). It focuses on the key urban centres in the Greater Norwich area, headed by **Norwich city centre**, and supported by the 'Main Towns' of **Aylsham, Diss, Harleston and Wymondham**. The study brief also requires consideration of two large district centres within the Norwich urban area — **Anglia Square** and **Riverside** — and two smaller centres within South Norfolk, **Loddon** and **Long Stratton**.
- 1.5 Our study has been informed by on-site and desk-based information gathering, including site visits to each of the centres listed above. Further evidence is provided by way of a household telephone survey of shopping and patterns of commercial leisure visits across Greater Norwich and a wider surrounding catchment (we refer to the area over which the household telephone survey was undertaken as the 'survey area' throughout this report).
- 1.6 The Town Centres & Retail Study 2017 is split over four volumes. This report forms Volume 1; Volume 2 sets out supporting plans; Volume 3 provides the quantitative retail 'need' tabulations which inform the overall findings of our study; and Volume 4 provides a full copy of the household survey results. GVA has also been instructed by the GNDP to undertake an assessment of employment needs across the GNDP area; a separate **Combined Strategy Paper** links the findings of this study with those of the employment study to provide a combined approach to planning for future employment and retail land use needs across the Greater Norwich area.
- 1.7 The remainder of Volume 1 of this Town Centres & Retail Study is structured as follows:
 - **Section 2** sets out our review of national, strategic and local planning policies relevant to retail and leisure planning;

- **Section 3** considers national trends in the retail sector, and in particular the implications of recent economic growth and technological advances which are impacting on people's shopping habits;
- **Section 4** undertakes a detailed 'health check' assessment of Norwich city centre, setting out its current retail and leisure offer and performance against Planning Practice Guidance town centre vitality and viability indicators;
- **Section 5** sets out 'health check' assessments of the two large district centres in Norwich at Anglia Square and Riverside;
- **Section 6** sets out 'health check' assessments of the 'Main Town' centres of Aylsham, Diss, Harleston and Wymondham, plus high-level assessments of the 'large villages' of Loddon and Long Stratton;
- **Section 7** sets out our approach to calculating retail capacity, including definition of the household telephone survey area and discussion of the approach to the survey work;
- **Section 8** sets out the quantitative 'need' for additional non-food ('comparison goods') and food ('convenience goods') floorspace, with forecasts split between the Norwich urban area and the rural areas of South Norfolk and Broadland (which include the aforementioned 'Main Towns');
- **Section 9** sets out our review of commercial leisure provision and provides an indication of the extent of growth likely to come forward in this sector; and
- **Section 10** draws our analysis together and sets out conclusions which in turn inform the strategies and recommendations in the Combined Strategy Paper which forms part of this study.

1.8 A glossary of key terms which are used throughout this study is appended to the rear of Volume 1.

2. National & local policy context

2.1 In this section we summarise the key features of national and local planning policy which provides the context and framework for this study, and informs the development of strategic policy recommendations in the Combined Strategy Paper. In respect of the local policy context, we present a review of how development plan policy in respect of retaining and town centres has been developed over time, and summarise the adopted Joint Core Strategy, which provides important context in respect of establishing the current hierarchy of centres within the GNDP area, and identifying the locations for where growth is planned. It also assists in identifying potential development opportunities in Norwich City Centre. The JCS will be replaced in full by the new GNLP and this study will form part of the evidence base which underpins the GNLP.

National policy context

National Planning Policy Framework (NPPF), 2012

2.2 The National Planning Policy Framework (NPPF), published on 27 March 2012, sets out the Government's planning policies for England and replaces the suite of national Planning Policy Statements, Planning Policy Guidance and Circulars with a single document. The NPPF recognises that the planning system is plan-led and therefore Local Plans, incorporating neighbourhood plans where relevant, are the starting point for the determination of any planning application. In line with the Government's aim to streamline the planning process, each Local Planning Authority (LPA) should produce a single Local Plan for its area with any additional documents to be used only where clearly justified.

Plan Making

2.3 The NPPF maintains the general thrust of previous policy set out in the preceding PPS4 – Planning for Sustainable Economic Growth (2009). It advocates a 'town centres first' approach, and requires planning policies to positively promote competitive town centre environments and manage the growth of centres over the plan period. In planning for town centres, LPAs should:

- Recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- Define a network and hierarchy of centres that are resilient to anticipated future economic changes;
- Define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary shopping frontages in designated centres and set policies that make clear which uses will be permitted in such locations;
- Promote competitive town centres that provide customer choice and a diverse retail offer which reflect the individuality of town centres;
- Retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- Allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Where town centre sites are not available, LPAs should adopt a sequential approach to allocate appropriate edge of centre sites;

- Allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available;
- Set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- Recognise that residential development can play an important role in ensuring the vitality of centres; and
- Where town centres are in decline, plan positively for their future to encourage economic activity.

2.4 The NPPF states that LPAs should ensure that the Local Plan is based on adequate, up-to-date and relevant evidence about the economic, social and environmental characteristics and prospects of the area. These assessments should be integrated and take full account of relevant market and economic signals. LPAs should use the evidence base to assess, inter alia:

- The needs for land or floorspace for economic development, taking account of both quantitative and qualitative requirements for all foreseeable types of economic activity over the plan period, including retail and commercial leisure development;
- The existing and future supply of land available for economic development and its sufficiency and suitability to meet the identified needs;
- The role and function of town centres and the relationship between them, including any trends in the performance of centres; and
- The capacity of existing centres to accommodate new town centre development.

2.5 Local Plans will be examined by an independent inspector whose role it is to assess whether the plan is 'sound'. In order to be found 'sound' the Plan should be:

- Positively prepared i.e. based on a strategy which seeks to meet objectively assessed development and infrastructure requirements
- Justified i.e. the most appropriate strategy, when considered against the alternatives;
- Effective i.e. deliverable over its plan period and based on effective joint working; and
- Consistent with national policy i.e. enable the delivery of sustainable development.

2.6 The NPPF adopts a presumption in favour of sustainable development and support for economic growth. In terms of decision-making, applications for planning permission must be determined in accordance with the development plan unless material considerations indicate otherwise. The NPPF is a material consideration in planning decisions.

Planning Policy Guidance (PPG) (2014)

2.7 In March 2014 the Department for Communities and Local Government (DCLG) launched the online Planning Practice Guidance (PPG), which cancelled a number of previous Planning Practice Guidance documents, including the Practice Guidance on Need, Impact and the Sequential Approach (2009). Although it does not constitute a statement of Government policy, it provides technical guidance on how to prepare a robust evidence base and how to assess the impact of proposals for main town centre uses. The web-based resource provides guidance on how to assess and plan to meet the needs of main town centre uses in full through the production of a positive vision or strategy for town centres. We have had regard, where relevant, to the contents of the PPG.

Permitted Development

- 2.8 An important change since the 2007 Study is the introduction of Permitted Development Rights covering class A1 retail units, meaning that they can now be converted to other uses without the need for planning permission. Specifically, the Permitted Development Rights made permanent on 15th April 2016 allow for the conversion of class A1 retail shop units to the following uses:
- Class A2 (financial and professional services);
 - Up to 150 sq.m class A3 (restaurants and cafes), subject to prior approval;
 - Up to 200 sq.m class D2 (assembly and leisure), subject to prior approval and if the premises were in class A1 use at 5th December 2013;
 - Class C3 (dwellinghouses), if the cumulative floorspace of the building is under 150 sq.m and subject to prior approval.
- 2.9 Councils have the power to remove national permitted development rights under what is known as an 'Article 4 Direction'. Article 4 (1) of the Town and Country Planning (General Permitted Development) (England) Order 2015 states that a Council when making a direction must be satisfied that it is expedient that development that would normally benefit from permitted development rights should not be carried out unless a planning permission is granted. Paragraph 200 of the NPPF states that the use of Article 4 directions to remove national permitted development rights should be 'limited to situations where this is necessary to protect local amenity or the wellbeing of an area'. Paragraph 038 of the Planning Practice Guidance states that in deciding whether an Article 4 direction would be appropriate, Councils should identify clearly the potential harm that the direction is intended to address.
- 2.10 We are aware of a number of local planning authorities that have introduced Article 4 directions covering their network of town centres as a mechanism of protecting the retail function of their centres and protecting their overall vitality and viability. The removal of permitted development rights ensures that any applications for changes of use within defined Article 4 areas are assessed against the relevant development plan.
- 2.11 A summary of the changes allowed under permitted development in respect of A-class and Sui Generis uses is shown overleaf.

From	To
A1 (shops)	A2 , or up to 150m ² A3 subject to Prior Approval, or up to 200m ² D2 subject to Prior Approval and only if the premises was in A1 use on 5th December 2013. A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
A2 (professional and financial services) when premises have a display window at ground level, but excluding betting offices or pay day loan shops	A1 , or up to 150m ² A3 subject to Prior Approval, or up to 200m ² D2 subject to Prior Approval and only if the premises was in A2 use on 5th December 2013. A mixed use comprising an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
A3 (restaurants and cafes)	A1 or A2
A4 (drinking establishments)	AA
A5 (hot food takeaways)	A1 or A2 or A3
AA (drinking establishment with expanded food provision)	A4
Sui Generis (casinos and amusement arcades/centres)	D2 , or only if existing building is under 150m ² A3 or subject to Prior Approval. C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval.
Sui Generis (betting offices and pay day loan shops)	A1 or A2 . C3 if the cumulative floorspace of the building is under 150m ² and subject to Prior Approval. A mixed use comprising a betting office or a pay day loan shop, or an A1 or A2 use and up to 2 flats may also be permitted subject to meeting certain conditions.

Historic Context to the Development of Local Policy

2.12 The Greater Norwich area authorities' approach to retail policy was initially developed during the 1980s in response to pressure for sporadic large scale, large format shopping development in the Norwich area, both in out of centre and out of town locations, including urban edge sites along the (then planned) A47 Norwich Southern Bypass. These opportunistic proposals were seen as posing a significant risk to planned regeneration and investment in the city centre, in particular Castle Mall and Riverside both then in their early planning stages. Norwich Area Shopping Guidelines supporting the then current Norfolk Structure Plan had been adopted by the three Norwich area districts in 1988 and a subsequent Norwich Shopping Strategy prepared by Norwich City Council and adopted in March 1989 set out a more detailed and integrated policy framework to shape future retail development in the City. The Norwich Shopping Strategy – at the time a non-statutory policy document – comprised a suite of integrated planning policies, supported by public realm management initiatives (CCTV, parking, anti-graffiti, pedestrianisation and traffic management) promoted by the Council in partnership with other stakeholders represented on a City Centre Management Board, later succeeded by the City Centre Management Partnership (CCMP) and more recently by the Norwich Business Improvement District (BID) initiative (discussed further in **Section 4**).

2.13 The Norwich Shopping Strategy included policies to:

- Build on the strengths of Norwich as a regional shopping and visitor destination, promoting and respecting the primacy of the city centre as a focus for retail led investment and improvement;

- Effectively support and defend the shopping function of the city centre;
- Promote and provide for high quality shopping development in locations which would complement and support the centre rather than compete with it – Castle Mall, Riverside (and later Chapelfield) being the key examples of this policy in action;
- manage change in established shopping areas in such a way as to give effective protection to core shopping areas whilst encouraging diversity and regeneration in secondary streets and more marginal areas;
- Recognise and exploit the considerable potential which the city centre offered for enhancement and environmental improvement, consistent with its historic character, visitor potential and retail function; and
- Manage and contain the growth of out of centre and out of town retailing through effective application of conditions limiting development to the sale of bulky goods only, alongside a number of new allocations to support the development of retail parks and district shopping facilities in locations that met an identified need.

2.14 In the thirty years or so since the initial adoption of the Norwich Shopping Strategy, the city has been able to secure significant growth of almost 50% in city centre retail floorspace compared with 1986, major investment in new city centre shopping facilities bringing forward over 50,000 sq.m of new covered shopping floorspace at Castle Mall and Chapelfield, large scale mixed use retail-led regeneration at Riverside alongside a number of smaller improvement and expansion schemes by individual retailers, refurbishment and enhancement of Norwich Provision Market and an integrated programme of pedestrianisation, streetscape enhancement and traffic management which still continues with the latest tranche of sustainable transport improvements in Westlegate and All Saints Street being implemented as part of the Transport for Norwich initiative.

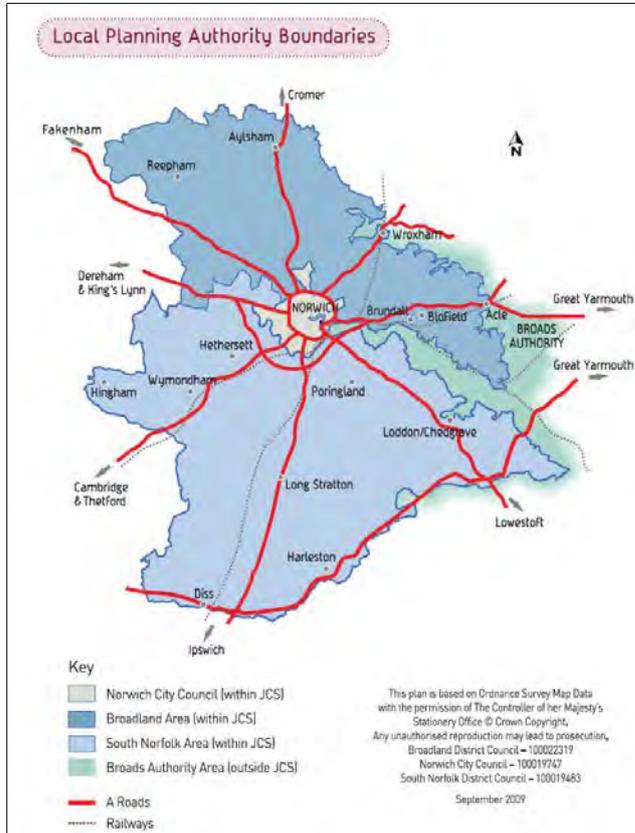
2.15 The Norwich Shopping Strategy was adapted and incorporated into the subsequent statutory Local Plans that superseded it – the City of Norwich Local Plan (1995), the City of Norwich Replacement local plan (2004) and the current adopted local plan comprising the Greater Norwich Joint Core Strategy (2011, amended 2014), the Norwich Site Allocations and Site Specific Policies Local Plan and the Norwich Development Management Policies Local Plan (both 2014). The long term success of the City's approach to planning for shopping was commended as an exemplar of good practice by the House of Commons Environment Committee on Shopping Centres and their Future in 1994, noting in particular Norwich's success in co-ordinated planning for town centres and integrated approach to town centre improvement and the use of public-private sector partnerships.

2.16 The recommendations of the parliamentary Committee, based on their experience of good practice in several authorities, including Norwich, have had a direct influence on the development of national planning policy for town centres, as embodied in the 1996 revision to PPG6, its replacement, PPS6 and the "town centres first" approach that still forms an important element of the NPPF from 2012. The success of this proactive, integrated approach to retail planning helped to raise Norwich's position in the national retail rankings from 45th in the late 1980s to being one of the top fifteen retail destinations in the whole of the UK today. The Greater Norwich authorities consider that it is this record of collaborative planning, targeted investment and improvement over an extended period which has helped to make Norwich significantly more successful, more adaptable and more resilient to decline than many of its competitors. The emerging GNLP will play an important role in ensuring that this success continues.

Current Local Policy Framework

Joint Core Strategy for Broadland, Norwich and South Norfolk 2014

2.17 As set out in the previous section, the Joint Core Strategy (JCS) represented a strategic vision for the future development of the Greater Norwich area, prepared by the GNDP. The JCS was initially adopted in March 2011; following a legal challenge in relation to the parts of the document concerning the North East Growth Triangle (NEGT), changes to the JCS were adopted in 2014. The JCS therefore comprises the JCS document adopted in 2011 and the subsequent changes made and adopted in 2014. The JCS will be replaced by the new Greater Norwich Local Plan (GNLP), and this study will form part of the evidence base for this GNLP. As the JCS remains the statutory local-level policy guidance whilst the GNLP is under preparation, we provide a broad overview of the general strategic approach of the JCS below, but it should be remembered that this strategic approach will be reviewed by the new GNLP and could, therefore, be revised.



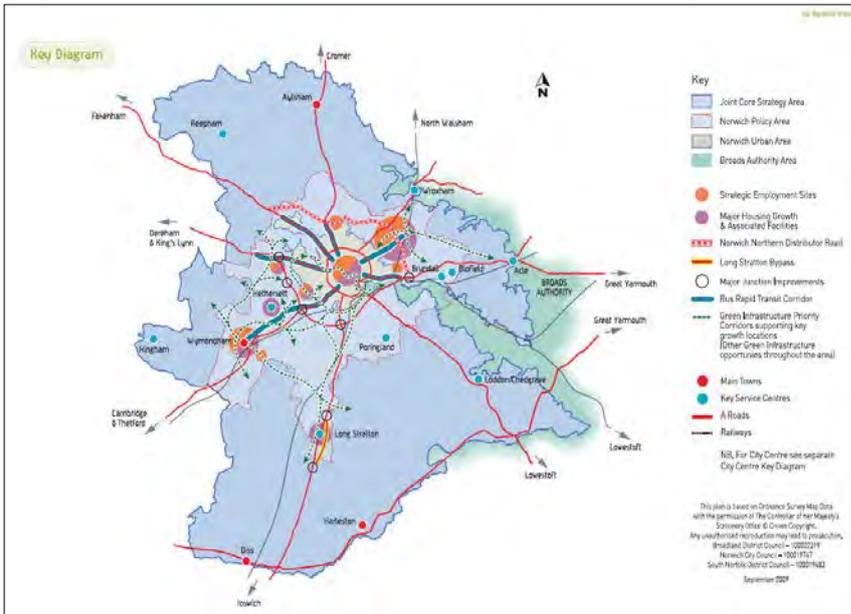
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2.18 The JCS is the single key overarching strategic policy document prepared through a joint, collaborative approach by the three councils of Broadland, Norwich and South Norfolk, working with

Norfolk County Council as the GNDP, to deliver a strategic vision for the future growth of the Greater Norwich area. The JCS is thus part of each council's adopted Local Plan and sets the strategic context for the future development of Greater Norwich's constituent Districts up until 2026. Each authority area has produced its own district-specific site allocations plans, area action plans and development management policy documents (detailed later in this section) which complement and interpret the JCS. Importantly, however, the JCS means that the Greater Norwich area is regarded as a single area for strategic planning purposes and the GNLP will also be approached on the same basis, being prepared by a single inter-authority planning team.

2.19 The JCS sets out objectives and policies to steer and shape development across the JCS area (shown below). It identifies locations for new housing, employment growth and transport infrastructure, and defines areas where development should be limited.

2.20 Norwich and the surrounding area are identified for targeted investment and growth to account for an increasingly aging population, a growing population in the South East of England, and a deficit in the number of homes which have been built in recent years in the region.



2.21 The JCS identifies that growth will be focused in an area defined as the 'Norwich Policy Area', a long-standing local planning area which has been identified to ensure that growth needs arising from the Norwich urban area are addressed to it as close as possible (JCS, paragraph 5.22). The Norwich Policy Area (shown in the plan above) covers the entirety of the Norwich urban area plus surrounding settlements which benefit from a close functional relationship

with, and accessibility to, the urban area. The JCS defines the Norwich Policy Area as 'Part of the county which is centred on and strongly influenced by the presence of Norwich as a centre for employment, shopping and entertainment, generally comprising the fringe and first ring of large villages around the city of Norwich, but extending to Long Stratton and Wymondham'. The Norwich Policy Area extends into all three local planning authority areas, covering a total of 50 parishes.

2.22 Proposals for growth in the Norwich Policy Area includes a major urban extension to Norwich at the Old Catton, Sprowston, Rackheath and Thorpe St Andrew 'growth triangle' as well as through allocations at Cringleford, Easton/Costessey, Hethersett, Long Stratton and Wymondham. Policy 9 of the JCS sets out the aspirations for growth in housing, employment and infrastructure across the Norwich Policy Area, identifying a need for a minimum of 21,000 dwellings to be delivered across the Norwich Policy Area, plus at least 100,000 sq.m of new office floorspace, upgraded road, rail and park & ride links, and enhancement of green infrastructure.

2.23 Policy 9 of the JCS also identifies that residential growth within the Norwich Policy Area will be focussed on the city centre (3,000 dwellings), the growth triangle (7,000 dwellings by 2026, increasing to 10,000 in the long term), Easton/Costessey (1,000 dwellings), Cringleford (1,200 dwellings), Hethersett (1,000 dwellings), Long Stratton (1,800 dwellings) and Wymondham (2,200 dwellings), with the balance coming forward on small sites in Broadland and South Norfolk District areas. Outside the Norwich Policy Area, moderate levels of additional housing growth are also expected to come forward at Diss (300 dwellings), Aylsham (300 dwellings), Harleston (200-300 dwellings) and Reepham, Loddon, Wroxham and Acle (each 100-200 dwellings). The JCS therefore makes it clear that the Norwich Policy Area is the most suitable location within which growth should be directed, but does not seek to prevent growth of an appropriate scale coming forward elsewhere.

2.24 The growth triangle is in the north east of the JCS area which has been identified to deliver a major urban extension located either side of the Norwich Northern Distributor Road (NDR) (which is under construction and due to open February 2018). The new community will comprise a series of inter-related new villages/ residential quarters and a new district centre focused on an 'accessible high street'. Local centres are also proposed to provide shopping and facilities to meet everyday needs. It is envisioned that the proposed new district centre will include an anchor food store and sufficient leisure and ancillary activities to provide for a range of visitor trips. Location of the new district centre and details of its function are set out in the Growth Triangle Area Action Plan (AAP July 2016, Broadland District Council) (see Broadland Local Plan section below).

2.25 Where growth is directed to Cringleford, Easton/ Costessey, Hethersett, Long Stratton and Wymondham provision is made for appropriate expansion and improvement of services and facilities in line with the existing function and character of those locations.

Hierarchy of Centres

2.26 Policy 19 of the JCS sets out the existing hierarchy of centres¹ within The JCS area. The JCS hierarchy is reflected in and supported by the more detailed site specific policies and proposals and relevant development management policies detailed within the local plans prepared by the individual districts within greater Norwich.

2.27 The hierarchy of centres reflects the existing function of these centres and the catchment area they serve. The availability of offices, leisure, shops, services and the future potential to accommodate growth has been taken into account when developing the hierarchy. As part of the preparation of the GNLP the existing hierarchy of centres and the position of settlements within that hierarchy may be reviewed.

2.28 For the purposes of this study we have referred to three categories within the hierarchy. Categories 1 and 2 group the largest centres including Norwich and the Main Towns (plus large district centres) whilst category 3 groups the smaller district centres within Norwich and the smaller towns and larger villages. Generally centres in categories 1 and 2 serve substantial urban and rural catchments compared with those in category 3 which serve more localised catchments and have a greater emphasis on meeting everyday shopping and service needs.

2.29 As the largest centre in the region, Norwich City Centre is at the top of the hierarchy. The JCS recognises Norwich as a strong office, retail and leisure destination and the principal retail centre in the region. Figures from Norwich City Council identify that in 2009 there were approximately 1,110 shops comprising 229,000 sq. m of retail floorspace, predominantly in comparison goods. However there has been a marginal decline in the amount of retail floorspace in the city centre since the 2007 Study: Norwich City Council's Shopping Floorspace Monitor Report (most recently published June 2016) shows that in 2016 there was approximately 224,000 sq.m of class A1 retail floorspace in the city centre, and identifies a decrease of approximately 5,100 sq.m (-2.2%) in class A1 floorspace in the city centre between 2008 and 2016. There has been a greater decline in class A1 retail floorspace in the primary shopping frontage in the city centre; however this has been offset by an increase in class A1 retail floorspace in secondary shopping frontage.

2.30 The key diagram overleaf indicates the retail areas contained within Norwich City Centre. It contains the Primary Retail Area which sits at the top of the retail hierarchy. A number of secondary shopping areas adjoin the Primary Retail Area: the JCS identifies that these may be appropriate for development complementary to the main focus of shopping. The Large District Centres of Anglia Square/Magdalen Street and Riverside are second tier centres which also fall within the central area which combine a district shopping centre role (meeting essentially local shopping

¹ The hierarchy of centres set out in the JCS is as shown below. Reflecting the requirement of the study brief, in this study we consider centres in the top two tiers, plus Loddon and Long Stratton in tier 3.

1. Norwich city centre

2. **The town and large district centres of:** Aylsham, Diss, Harleston and Wymondham, and within the Norwich urban area, at Anglia Square/Magdalen Street and Riverside

3. **The large village and district centres of:** Acle, Coltishall, Hethersett, Hingham, Loddon, Long Stratton, Poringland and Reepham, and within the Norwich urban area at Aylsham Road, Drayton Road, Bowthorpe, Dereham Road, Eaton centre, Earlham House, Larkman centre, Plumstead Road, Old Catton and Dussindale (Thorpe St Andrew). New district centres/high streets to be established within the Old Catton, Sprowston, Rackheath, Thorpe St Andrew growth triangle, at Blue Boar Lane, Sprowston and Hall Road, Norwich. The Old Catton, Sprowston, Rackheath, Thorpe St Andrew Growth Triangle will be served by a district centre. This may be provided by building on the proposed district centre at Blue Boar Lane or the creation of a second district centre elsewhere in the Triangle as determined through the Area Action Plan for the Growth Triangle

4. **Local centres**, including new and enhanced local centres serving major growth locations in the Norwich Policy Area

needs) with more specialist comparison and convenience shopping facilities sometimes serving a somewhat broader catchment. The large district centres are complemented by other district centres within the Norwich urban area (at level 3 of the hierarchy) and smaller local centres (at level 4) which are intended to meet the needs of local residents. The JCS and the more detailed local plans prepared for the Greater Norwich districts provide for improvements to these centres to strengthen them as shopping destinations.

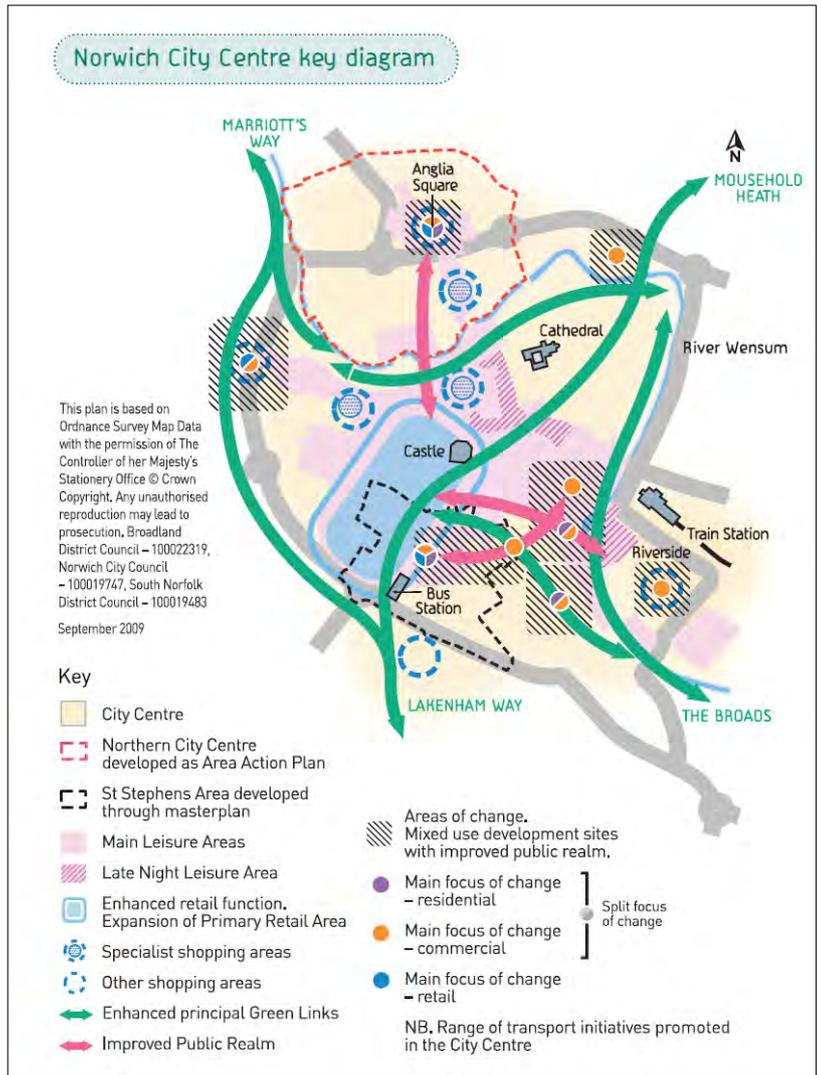
2.31 Other large centres outside the Norwich urban area include Aylsham, Diss, Harleston and Wymondham. These traditional market towns offer approximately 100-140 shops and services and serve significant rural catchments.

Norwich City Centre

2.32 Policy 11 of the JCS provides for the regional centre of Norwich city centre to be enhanced through regeneration and redevelopment to encourage greater use of the city centre, assisted by the redevelopment of brownfield sites. Norwich city centre is acknowledged as the main focus in the sub-region for retail and leisure development alongside housing and education development to boost the vibrancy of the city centre. The Norwich City Centre key diagram set out in the JCS (above) shows the overall vision for the city centre.

2.33 Policy 11 of the JCS advocates enhancement of Norwich's retail function through providing varied types and size of retail units and through intensification of the Primary Retail Area, or where necessary its expansion. Other shopping areas in the city are proposed to be strengthened with particular emphasis on the specialist shopping areas and markets. Policy 11 of the JCS identifies three 'areas of change' where comprehensive redevelopment is expected to come forward:

- **Northern City Centre** – the JCS states that the regeneration of the city centre is to be developed in accordance with the Area Action Plan (The Area Action Plan itself has now expired, although the overall policy aspiration for regeneration of the area remains part of the adopted local plan by virtue of this policy)
- **St Stephen's area** – the intention was for the regeneration of the St Stephen's area to be the subject of a separate masterplan, although this was never adopted into policy, partly as a consequence of the economic downturn in 2008 making some of the proposals undeliverable. The principles set out in the masterplan have, however, subsequently informed the preparation of Norwich City Council's Site Allocations Local Plan (discussed below).
- **Rose Lane area** – major focus for commercial development and regeneration. Since publication of the JCS, a new 595-space multi-storey car park has been constructed at Rose Lane, which opened in 2016. It is



hoped that this development will form the first phase of regeneration of the area and act as a catalyst for further investment in the area.

- 2.34 In terms of retail development, the JCS envisages significant growth in comparison goods retail floorspace and a limited need for convenience goods floorspace — these conclusions reflect the findings of the 2007 Study which this study updates, having regard to changes which have taken place in the retail and leisure sector in the interim period, which we discuss further in the following section. The majority of new convenience goods floorspace was expected to have been delivered through the development of a new food store at Anglia Square district centre.
- 2.35 Following the expiry of the Northern City Centre Area Action Plan, a policy guidance note (November 2016) has been adopted as an interim policy statement in March 2017 to respond to proposals for the regeneration of Anglia Square and the surrounding area. The draft guidance note makes no reference to a new foodstore to be provided onsite at Anglia Square, stating that the need for convenience shopping floorspace has largely been met in the city centre through the provision of smaller scale foodstores.

Main Towns

- 2.36 The four 'main towns' in the JCS area are Aylsham, Diss, Harleston and Wymondham. Policy 13 of the JCS sets out guidance in terms of the need for town centres uses in these centres, as follows:
- **Aylsham** — 'Limited expansion' in or adjacent to the town centre;
 - **Diss** — 'Significant expansion' in or adjacent to the town centre
 - **Harleston** — 'Limited expansion' in or adjacent to the town centre
 - **Wymondham** — 'Major growth', detailed proposals to be developed through the now-adopted Wymondham Area Action Plan (see JCS Policy 10)
- 2.37 Whilst development and expansion are intended for these main towns, any development which does take place must be sensitive to the surrounding area and take into account, for example, the Broadland Special Protection Area, Broadland Ramsar and Broads Special Area of Conservation.
- 2.38 The JCS discusses the role and function of each of the four 'main towns' and their capacity to accommodate additional development, which can be summarised as follows:
- **Aylsham** – offers the fourth highest level of shops and services outside Norwich, available employment land and capacity within the schools located there. Therefore this main town is expected to accommodate new housing.
 - **Diss** – an attractive market town which serves a large rural catchment which extends to parts of South Norfolk and northern Suffolk. The JCS recognises Diss as having scope to accommodate new shopping floorspace to be on an existing retail allocation adjacent to the town centre. Further to this smaller scale opportunities will be sought to strengthen the town's non-food and leisure offer. This proposed retail expansion will complement the planned growth for an approximate 300 dwellings up to 2026 and job growth which will be encouraged.
 - **Harleston** – serves a relatively local catchment area and offers a good range of speciality shops and services. It is not expected that Harleston will also accommodate a significant amount of new retail floorspace; it was considered that needs could be met through modernisation and extension of existing units. Similarly to Diss, housing and job growth will be encouraged up to 2026 which justifies a need for an adequate provision of retail shops and services.
 - **Wymondham** – located on the strategic A11 corridor, Wymondham has an attractive historic centre and a good range of shops and services. The JCS proposed for moderate expansion of shopping floorspace for

both comparison and convenience shopping although subsequent to its publication a new Morrison store has opened in the town. Employment opportunities will also be expanded here.

Key Service Centres

2.39 The JCS identifies Ten Land within the 'Key Service Centres', shown in the table², where residential growth is expected to come forward.

Key Service Centre	Residential Allocation
Acle	100 to 200 dwellings
Blofield*	Approx. 50 dwellings
Brundall*	Approx. 50 dwellings
Hethersett	1000 dwellings
Hingham	Approx. 100 dwellings
Loddon/ Chedgrave	100 to 200 dwellings
Long Stratton*	At least 1,800 dwellings
Poringland/ Framingham East*	100 to 200 dwellings
Reepham	100 to 200 dwellings
Wroxham	100 to 200 dwellings

2.40 Of the key service centres show above, this study only considers Loddon and Long Stratton reflecting the requirement of the study brief:

- The JCS describes Loddon as a historic centre which provides a range of shops and services with public transport links to Norwich and other nearby centres. New residential development of 100 to 200 dwellings is proposed up to 2026.
- Long Stratton is identified as having the best range of local shops and services out of all the Key Service Centres and it also has reasonable bus links to Norwich. The development proposed here is to be significant, with at least 1,800 new dwellings proposed plus supporting community and commercial development and further employment opportunities and enhanced public transport. Should future provision commercial development be strong enough the JCS suggests that there may be potential to move Long Stratton's status from 'Key Service Centre' to 'Main Town'.

Norwich Local Plan

2.41 Norwich's Local Plan comprises the following documents:

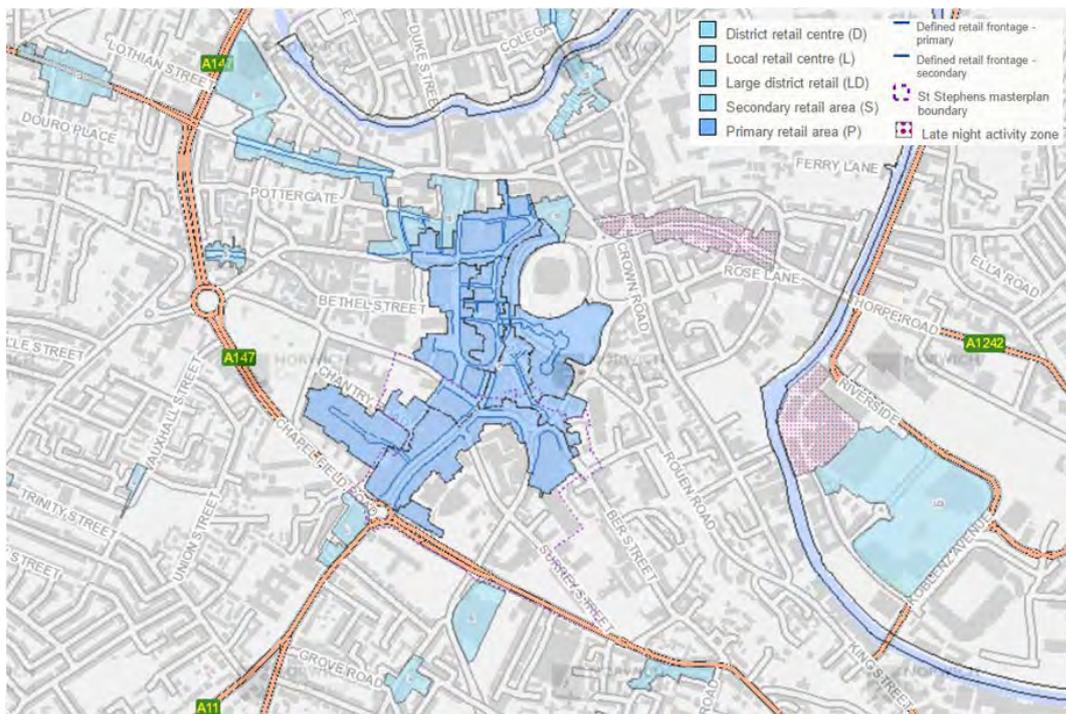
- Joint Core Strategy (JCS) for Broadland, Norwich and South Norfolk (adopted 2011 with 2014 amendments), as reviewed above;
- Norwich Development Management Policies Local Plan (adopted 2014); and
- Site Allocations and Site Specific Policies Local Plan 2014 (adopted 2014).

² Those centres (marked*) within the Norwich Policy Area may be considered for additional development to deliver smaller sites in the Norwich Policy Area. Established retail and service areas will be protected and enhanced where appropriate to serve the needs of these future residential dwellings.

Norwich Development Management Policies Local Plan DMP (2014)

- 2.42 This document contains a suite of detailed planning policies to guide and manage change in Norwich up until 2026. Policies DM20 and DM21 seek to manage change in primary and secondary shopping retail areas, large district centres and district and local centres. Policy DM20 states that within the defined primary and secondary retail areas and large district centres (see **Figure 2.1**) permanent changes of use to classes A2, A3, A4, A5 and other main town centre uses will be permitted where they do not impact upon the vitality and viability of the area. The policy seeks to strengthen and protect the retail offer of the city centre, maintaining the approach previously set out in the 2004 Local Plan as well as in the JCS. The primary retail area and the Anglia Square/ Magdalen Street Large District Centre have defined retail frontages, as illustrated in the Local Plan policies map, to which this policy applies.
- 2.43 Policy DM20 is supported by the Main Town Centres and Retail Frontages SPD, adopted in December 2014, which provides additional guidance and advice on the balance of uses to be sought in each of the retail frontage zones defined within the city centre, acknowledging the greater flexibility introduced by permitted development rights changes since 2013.
- 2.44 Policy DM21 details the management of uses within district and local centres and seeks general approach of encouraging appropriate uses that are consistent to the scale and function of the position of the centre within the retail hierarchy as set out in the JCS.

Figure 2.1: Norwich Development Management Policies Plan – Retail frontages



Norwich Site Allocations and Site Specific Policies Local Plan (SASSP) (2014)

- 2.45 The SASSP sets out detailed policies and proposals for 73 sites in Norwich where new development and change is expected up until 2026. The plan also provides for employment and mixed use development on key sites to support growth and regeneration. A number of the sites are considered suitable for the development of retail and other 'main town centre uses'; the sites vary considerably in terms of the size and the range of uses which can be accommodated. The 'main town centres uses' allocations are as follows:

- **Site CC1: 60-70 Ber Street** — a 0.19ha site which is considered to have potential to accommodate up to 20 residential units, plus retail and/or office development at ground floor level. The site is owned by Norwich City Council.
- **Site CC3: 10-14 Ber Street** — a 0.1ha site which the Council considers to offer potential for a mixed use development, incorporating a minimum of 10 residential dwellings, plus retail or complementary uses (class A2 or A3) at ground floor level, and office uses. The site is on the fringe of the primary shopping area.
- **Site CC4: Land at Rose Lane and Mountergate** — this is a large (4.08ha) strategic site which currently contains a range of offices, light industrial units and shops fronting Prince of Wales Road, mostly in poor quality buildings. The City Council considers the site to be under-used, and to be suitable for sustainably-accessible mixed-use redevelopment, owing to its proximity to the railway station. The City Council envisages that the main focus should be on office development, with a 'significant element' of high density residential development. The City Council does not envisage the site to be suitable to accommodate a significant quantum of retail and other 'main town centre' uses, but 'small scale' retail and 'non-late night' uses should be included as part of any redevelopment of the site. A portion of this site has been built out to accommodate a new multi-storey car park at Rose Lane, which opened in 2016.
- **Site CC5: Land at Greyfriars Road / Rose Lane** — This is a 0.11ha site located on the north side of Rose Lane, allocated for a residential-led redevelopment to accommodate a minimum of 20 units plus small-scale office and retail units fronting onto Rose Lane. The site has planning permission for 26 apartments and commercial floorspace at ground floor level; this is currently under construction.
- **Site CC6: St Anne's Wharf and adjoining land** — this is a strategic brownfield regeneration site, much of which was mostly recently in use as a brewery, although land has subsequently been cleared. There is an important pedestrian and cycle link running through the site which links it with the retail areas of Castle Mall (in the city centre) and Riverside district centre. The City Council's aspiration for this area is for residential-led redevelopment (approximately 300 dwellings), but identifies scope for other uses including culture, leisure, food and drink, hotel and tourist uses at ground floor level along key routes through the site. There is also an emphasis on upgrading public realm, including providing new open space and a riverside walk.
- **Site CC7: Hoborough Lane, King Street** — this is a 0.35ha site allocated for mixed-use redevelopment, to include a minimum of 20 residential units, plus small-scale retail and/or office use, food and drink, and tourism uses. Redevelopment of the site will include the conversion of two historic, listed buildings which front onto King Street. Part of the site has planning permission for redevelopment to include 25 apartments, a retail unit and a bar/restaurant unit.
- **Site CC9: 144-162 King Street** — a small 0.19ha site which is allocated for mixed use development for a minimum of 15 units. 'Small-scale commercial use' is considered acceptable at ground floor. The site has planning permission for residential development with a ground floor commercial unit.
- **Site CC12: Land at Wherry Road** — a 0.23 ha site located within Riverside district centre which is currently vacant. The City Council considers a residential-led redevelopment of the site to be appropriate, but other uses which may be acceptable include office, leisure uses or hotel development. The site has been granted planning permission for housing development.
- **Site CC21: Former Eastern Electricity Board Offices, Duke's Wharf, Duke Street** — this 0.84ha site is located on the south bank of the River Wensun, and is allocated for a mix of uses including offices and potentially residential use and small-scale retail units including possible food and drink uses and professional services. Hotel uses may also be acceptable. We understand that prior approval has been granted for 69 dwellings on the site.

- **Site CC22: Barn Road Car Park** — this is a relatively small site (0.42ha) but performs an important role as a 'gateway' site into the city centre. The site is allocated for mixed use redevelopment, to include retail uses at ground floor level, plus housing and office uses, and a short-stay public car park. Development at this site will also need to deliver enhanced pedestrian links to nearby shopping streets, including St Benedict's Street and St Swithin's Road.
- **Site CC23: Pottergate Car Park** — again, this is a small site (extending to just 0.07ha), currently used as a City Council-operated surface car park. The site is surrounded by a wide range of uses such as retail, café/restaurant, residential and offices, and there are other car parking facilities in the near vicinity. The site is allocated for a housing-led mixed-use development, with small-scale office or retail uses (class A1-A3) considered appropriate for the Pottergate frontage.
- **Site CC24: Land rear of City Hall** — this site was formerly in use as a car park, and is currently used by Norfolk Constabulary for parking and other police activities. The site is principally surrounded by civic and residential uses but is well located to the retail and commercial offer in the city centre. The site falls within the ownership of the City Council. The site is allocated for mixed use development to include residential, office and leisure, but the City Council envisages only 'limited' retail provision on the site.
- **Site CC25: Chantry Car Park** — this is a 0.28ha site which is currently used as a surface car park. It is well located in relation to existing prime retail area in the city centre, with the car park used as an informal pedestrian link into Intu Chapelfield, and close to key anchor stores such as Debenhams and Marks & Spencer. It is also proximate to The Forum, Theatre Royal, and the Norwich Lanes. The St Stephen's Street area outline masterplan identifies that the site can accommodate 1,420 sq.m of floorspace at ground floor level for retail, leisure, entertainment or hospitality uses, and a further 3,840 sq.m could be provided at upper levels. The majority of the site is under the ownership of the City Council. It is envisaged that the site is suitable for a mix of uses includes retail, café, leisure, art and entertainment uses on ground floors, and retail/offices on upper floors, with any redevelopment of the site needing to demonstrate compliance with the approach set out in the St Stephen's Street area outline masterplan.
- **Site CC27: St Stephens Street** —The site is located in the St Stephens Street area and is 1.5 hectares in size. The site mainly comprises shops along St Stephens Street and two seven-storey towers which are currently empty but were previously used as offices. The site also contains the Grade II* listed Bignold House on Surrey Street, and a multi-storey car park on the corner of St Stephens Street and Queens Road. The site is located adjacent to the bus station and opposite one of the entrances to Intu Chapelfield. Most of the surrounding area is in retail use, alongside service industries, restaurants, cafes and bars. One of the largest units in the area, formerly occupied by BHS, became vacant in 2016 following the company entering administration.

The entire site and buildings covered by this allocation are in a single ownership by Aviva Investors, who have expressed their intention to bring the development forward. Accordingly, the site is allocated for a comprehensive mixed use development, to include primarily retail development at ground floor level, with office and residential uses on upper floors. The Council is also seeking the development of a new pedestrian link to the bus station from St Stephens Street. If comprehensive mixed use development can be demonstrated not to be viable, then the re-use and redevelopment of the existing buildings on the site will be acceptable.

- **Site CC28: Land and buildings at junction of St Stephens Street and Westlegate** — this is a further small site within the St Stephens Street area. The site is allocated for a mixed use development of up to four storeys, to include retail units at ground floor level.

2.46 The above sites represent each of the allocations in Norwich City Centre where development of retail floorspace or other 'main town centre uses' is acceptable. As can be seen, the majority of the sites are relatively small-scale in their

size (generally under 0.5ha) and therefore will only be capable of accommodating a limited quantum of floorspace. However there are larger, well-located opportunity sites such as St Stephens Street which, if developed comprehensively, have scope to accommodate a greater quantum of floorspace to help meet the needs identified by this study.

2.47 The SASSP does not identify a significant number of sites outside the city centre for retail or other main town centres. However, allocations are in place to develop a new district centre at Hall Road (allocation R3) to meet everyday shopping needs of residents in the south Norwich area; planning permission has been granted for this development and subsequently implemented, with the 'anchor' foodstore to the new district centre, an Asda store, already trading. Elsewhere, allocation R21 seeks to strengthen Aylsham Road district centre through a mixed use development including retail provision to the street frontage, up to a maximum of 2,500 sq.m (gross), of which 300 sq.m net should be used for comparison goods sales.

Broadland Local Plan

2.48 Broadland's Local Plan comprises the following documents:

- Joint Core Strategy (JCS) for Broadland, Norwich and South Norfolk (adopted 2011 with 2014 amendments);
- Growth Triangle Area Action Plan (adopted 2016);
- Broadland Site Allocations Development Plan Document (adopted 2016); and
- Broadland Development Management Policies Development Plan Document (adopted 2015).

Broadland Development Management DPD (2015)

2.49 The Broadland Development Management DPD superseded the adopted Local Plan (2006) which set out policies in relation to District Centres within and outside the Norwich Policy Area. The DPD identifies 'commercial centres' (similar to a district centre, however extending over a wider area and contains more diverse range of businesses) located in Aylsham, Acle, Reepham and district centres located at Old Catton and Thorpe St. Andrew.

2.50 Policy R2 states that the retail parks at Sprowston and Sweet Briar will allow for the sale of non-food bulky goods only. This type of retailing is intended to be complementary to the role of Norwich city centre.

Growth Triangle Area Action Plan (Old Catton, Sprowston, Rackheath & Thorpe St Andrew) (2016)

2.51 The role of the Growth Triangle AAP is to enable strategic scale development to the north east of Norwich, reflecting the allocation set out in the JCS. By 2034 the Growth Triangle will have developed into a distinct area characterised by new homes, employment opportunities, services, facilities and key infrastructure. The vision for this new growth area is for co-ordinated sites based around walkable neighbourhoods with access to local service centres and public transport connections. The document aspires to deliver a minimum of 7,000 new homes by 20206 rising to at least 10,000 thereafter and as such a key challenge which is recognised is the need to provide adequate services and facilities to meet the needs of local residents and workers of the Growth Triangle Area.

2.52 Policy GT1 states that for mixed use development in the area there should be in the region of 1 sq. m of retail floorspace for each 30 sq. m of residential development. The ratio is a guideline and can be negotiated however it is expected that a mixed use development incorporates a range of uses including convenience retail and a mix of small scale A Class uses. The appropriate scale will be based upon local circumstances and will be appropriate to the function of the existing centre in the context of the hierarchy of centres (in accordance with JCS Policy 19).

South Norfolk Local Plan

2.53 South Norfolk's Local Plan comprises the following documents:

- Joint Core Strategy (JCS) for Broadland, Norwich and South Norfolk (adopted 2011 with 2014 amendments);
- South Norfolk Development Management Policies Document (adopted 2015);
- Site Specific Allocations and Policies DPD (adopted 2015);
- Wymondham Area Action Plan (adopted 2015); and
- Long Stratton Area Action Plan (adopted 2016).

South Norfolk Development Management Policies Document (DMPD) (2015)

2.54 This document supersedes the South Norfolk Local Plan (2003). The South Norfolk DMPD sets out its hierarchy of centres including the main towns of Diss, Harleston and Wymondham and key service centres including Hetherset, Hingham, Loddon and Long Stratton. Any new development in these centres will be required to be appropriate to the form and function of each centre in accordance with Policy DM 2.4 of the DMPD. Proposals for 'main town centre uses' will be directed towards each centre's defined primary shopping area or elsewhere in defined town centre areas. Policy DM2.5 of the DMPD states that in defined town centre areas development proposals for uses A1-A5 and D2 will be encouraged. The policy wording indicates that a varied mix of uses will be encouraged elsewhere in the town centre away from the primary shopping area.

Wymondham Area Action Plan (2015)

2.55 The AAP sets out a vision for Wymondham town centre to be improved to give a greater choice of shops and services whilst remaining and enhancing its distinct historic core and its role as a vibrant market town. Policy WYM 18 sets out the policy for the allocation of a new supermarket for the land at Norwich Road/ Postmill Close; this site has now been developed as a Morrisons store.

2.56 The AAP states that the previous retail study (2007) suggested there was no need to define separate primary and secondary shopping frontages. Outside this primary shopping area a wider variety of uses will be encouraged including restaurants and other types of town centre type services and businesses.

Long Stratton Area Action Plan (2016)

2.57 The AAP has a vision for a revitalised and enhanced environment with potential for a new market place to act as a focal point. The AAP aims to encourage reuse of existing buildings and provision of additional retail facilities which relate to the existing centres function. The town centre policy of the AAP states that any proposals should seek to enhance the character and appearance of the town centre given its historic character.

3. Study context

- 3.1 In this section we set out a summary of current national trends in respect of the retail, commercial leisure and the role of town centres, which can have implications for future growth of centres and demand for new retail floorspace. As part of our assessment, we consider the potential implications of these trends on centres in the CNDP area.

A return to growth — but a slowing recovery

- 3.2 Analysis published by Experian (Retail Planner, November 2016) identified that following several years of subdued performance, including the period of recession; a 'strong economic upswing' subsequently took place, driven by increases in consumer spending and business investment. Experian comment that:

'The UK recovery has continued into 2016. However, there has been some moderation to the pace of upswing since 2014... the recovery has become increasingly reliant on consumer spending as investment has slowed. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year'.

- 3.3 In terms of future projections of consumer spending, Experian's outlook is notably cautious, stating that:

'We expect consumer spending to begin to weaken over 2017, suffering from higher inflation in the wake of the steep fall in the sterling's exchange rate since the referendum. Wage growth remains modest and is likely to be overtaken by higher inflation, which in turn will constrain spending power'.

- 3.4 Experian conclude that *'the outlook for the next two years for the UK economy has weakened significantly following the Brexit vote'*. In the medium term, Experian consider that *'the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude, and in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans'*.

- 3.5 There has therefore been a return in confidence to consumer spending in recent years, which offers potential for strongly-performing town centres to capitalise on, although the most recent guidance from Experian suggests that this recent return to confidence is now being challenged by the uncertainty arising from the referendum vote in June 2016 — as well as other changes in the retail sector which we discuss below.

Online shopping and 'Click & Collect'

- 3.6 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred and there continues to be an important role for the 'high street' to play.

3.7 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. Recent data from industry monitor Verdict³ suggests that click & collect expenditure is expected to grow by 64% between 2016 and 2021, compared to an online growth of 38% over the same period. Verdict's research forecasts that click & collect will grow across all categories, but will particularly be driven by the clothing and footwear sector. The proportion of online orders completed by click & collect has increased from 8.8% in 2011 to 22.5% in 2015⁴, demonstrating steadily-increasing year-on-year growth.

8.8%

Proportion of online orders completed by 'Click & Collect' in 2011

22.5%

Proportion of online orders completed by 'Click & Collect' in 2015

64%

Forecast growth in 'Click & Collect' expenditure between 2016 and 2021

3.8 The popularity of click & collect is an important opportunity for town centres, as it can act as a footfall generator in its own right. Verdict identify that 39% of consumers make an additional purchase when collecting an item from a store, up from 29% in 2013. The average amount spent on additional in-store purchases is £13. The majority of national retailers now operate click & collect services. Of the top 10 UK retailers by online revenue in 2015 (see **Figure 3.1**), many have a trading presence in the Greater Norwich area, though in many cases their presence is confined to Norwich itself.

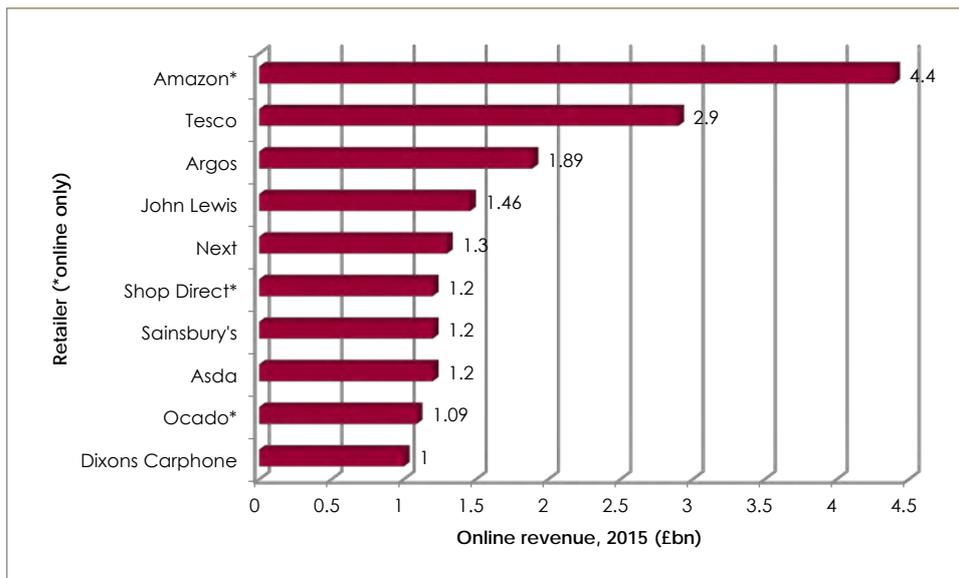
3.9 Despite being a relatively new concept for the retail sector to embrace, click & collect is affirming that physical stores can continue to have a role in the multichannel shopping environment. However the independent retail sector has generally been slower to embrace the click & collect model and this represents an important opportunity in locations where the independent retail sector is an important contributor to the overall vitality and viability of centres — this is particularly applicable in the Main Towns and smaller centres in the Greater Norwich area, which generally have lower levels of representation from national operators.

3.10 The click & collect model is not solely benefiting town centres — for example Morrisons is trialling Amazon Lockers in a number of its stores, whilst companies such as Duddle are opening collection/return points within or close to mainline railway stations, acting as click & collect 'hubs' where customers can get orders from a wide variety of retailers sent to and return unwanted goods from: A branch of Duddle has recently opened in Norwich, within the Morrisons store at Riverside. For town centres to benefit as the 'preferred locations' for click & collect services they need to have a strong, complementary offer, to give people multiple reasons to visit. Increasingly, local shops and newsagents are also offering 'Click & Collect' facilities, using networks such as CollectPlus, which partners with brands such as ASOS, John Lewis and House of Fraser to deliver online orders to a network of 6,000 local shops across the country, and convenience stores operated by Nisa, Spar and Costcutter.

³ Source: Verdict Retail Channel Series – Click & Collect in the UK 2016

⁴ Source: IMRG Click & Collect Update April 2016, <https://www.imrg.org/imrg-insight/click-collect-update-april-2016/>

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores

Changing retailer space requirements

- 3.11 During the last recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of online shopping means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.
- 3.12 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats; Norwich city centre is ranked within the top 15 shopping destinations in the country⁵ and therefore has been a beneficiary of this change in shopping patterns. The city centre has — as our 'health check' analysis set out in this report demonstrates — a strong range of national operators, many of which operate from large, regional flagship stores — examples including Marks & Spencer, John Lewis, Zara, H&M and so on. However data from retail rankings provider Javelin Venuescore suggests that the retail offer of Norwich is more orientated towards the 'middle market' than a number of its similarly-ranked shopping destinations such as Bristol, Nottingham and Aberdeen, all of which are identified by Venuescore as having an 'upper-middle' retail offer, i.e. more orientated towards the upper-class end of the fashion spectrum. The recent investment by Primark to expand and redevelop its store on Haymarket is an example of the investment companies are willing to make in enhancing their regional flagship stores.
- 3.13 This 'polarisation' towards larger centres can in turn pose a challenge to smaller and medium-sized centres, where there are higher order centres in close proximity. Many operators — particularly in the clothing/fashion sector — are continuing to close stores in less-profitable, smaller locations as leases expire. The consequence which often arises is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Home Bargains, Sports Direct and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates.

⁵ Source: Javelin Venuescore Rankings 2016-17

- 3.14 The exception to the above trend is smaller centres which have an existing upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. These centres have a curated, specialist retail and leisure mix often centred on an upmarket clothing, homewares, and casual dining offer. Typically these centres also offer a strong historical setting and environmental quality which increases their attractiveness as 'destinations' (a point we discuss further below). Examples of centres which perform this role include Marlow in Buckinghamshire and Southwold in Suffolk. Indeed, the Norwich Lanes within Norwich city centre can also be considered to fulfil this role, acting as an attractive shopping destination in its own right.

The role of the town centre

- 3.15 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the first quarter of 2016⁶, emphasising the need for centres to offer a broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces. Norwich city centre already performs this role, offering a number of clusters of different types of food and drink and 'evening economy' uses. Our health check assessments confirm that there is scope for the study area's Main Towns to further diversify their role in this respect.
- 3.16 As noted above, centres which offer unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly. Enhancing the non-retail offer so town centres (and smaller centres) function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness. A number of the Main Towns are well positioned to capitalise in this respect.
- 3.17 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with easy and frequent public transport access, appropriate levels of car parking provision, as well as investment in public realm and place marketing initiatives. The night-time economy also plays an important role in the vibrancy of Norwich city centre in particular, and it is important that this is supported and invested in to enable residents and visitors to feel secure and safe in the centres at night.

The convenience sector

- 3.18 One of the biggest changes which has taken place since the 2007 Study is a fundamental change in food shopping patterns. Industry data providers Mintel⁷ have recently described the changes in convenience goods shopping as 'the trends of the whole of the post-war era [being] reversed', identifying the following key trends in convenience goods shopping:
- Superstores are losing market share;
 - The convenience [small-format] stores of the market leaders and the Co-op are gaining share;
 - Aldi and Lidl are achieving double-digit growth;
 - Other convenience stores are losing share;

⁶ Source: IPSOS Retail Traffic Index

⁷ Source: Mintel UK Retail Rankings 2016

- Certain retailers classified as non-food retailers, notably M&S and the non-food discounters such as Home Bargains and Poundland and increasing their share of food spending; and
- Online demand is growing.

3.19 Mintel consider there to be two reasons behind these trends, which they consider started in 2012. Firstly, *'There has been a shift of population back into inner cities and much of it into rented accommodation. These people are much more likely to shop on an 'as needs' basis and to eat out. So the majority of their food retail demand goes to convenience stores. This is also apparent in the growth of craft bakers and the development of specialist delis'*. Secondly, Mintel note that *'Aldi and Lidl have transformed their offer, expanding their ranges, strengthening their fresh foods and adding premium lines. We think this has led to a step change in their performance and that we are approaching a time when growth will be primarily driven by store openings'*.



New Asda store at Hall Road, Norwich

3.20 The increased popularity of 'as needs' shopping is behind the growth of small-format 'convenience' stores such as Sainsbury's Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose, with this trend particularly apparent in urban areas, and representation from many of these operators has increased since the 2007 Study.

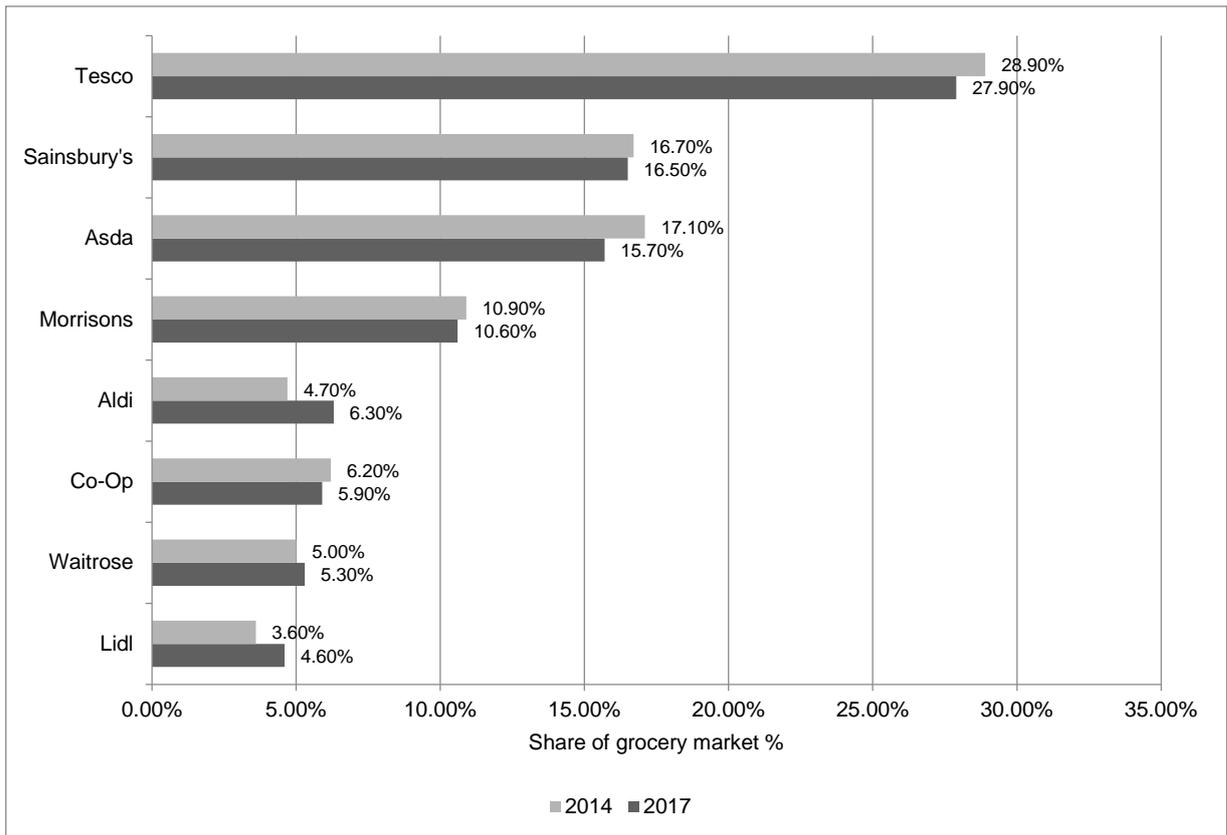
3.21 The main foodstores (i.e. the 'big four' – Asda, Morrisons, Sainsbury's and Tesco) have responded to these changes by reining in substantial expansion of their estates, particularly in terms of larger-format superstores. This is a relatively recent development — subsequent to completion of the 2007 Study Sainsbury's made significant investment in redeveloping and extending their store at Longwater, for example, and have also invested in improvements to their other larger-format stores in Norwich.

3.22 Reflecting the rapid changes which have taken place in the convenience goods sector, both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by

Morrisons in 2016. In early 2017, Waitrose and M&S also revealed plans to close a small number of stores. In all cases no stores in the study area were affected, however.

3.23 Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the 'big four', and both Aldi and Lidl are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. However, as quoted above, Mintel consider that aside from growth from new store openings, these operators' growth may now begin to plateau. The market share of Aldi and Lidl combined is now over 10% of the total grocery market — but as can be seen from **Figure 3.2** neither operator is yet challenging the dominance of the 'big four' retailers of Tesco, Sainsbury's, Asda and Morrisons

Figure 3.2: Market share of main foodstore operators, 2014 and 2017



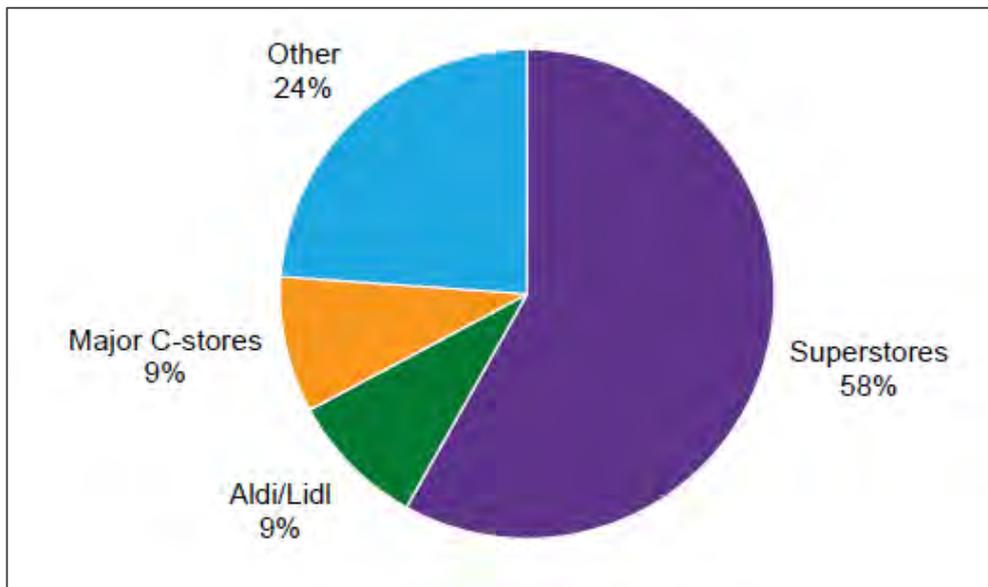
Source: Kantar Worldpanel, March 2017

3.24 However, notwithstanding the trends discussed above, over 50% of food shopping is still undertaken in larger-format supermarkets — and if shopping in Aldi and Lidl stores is included this figure rises to over two-thirds of all food shopping (see **Figure 3.3**). There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, but generally speaking operators are opening smaller format stores than was the case at the time of the Council's previous evidence base studies. The new Asda store which recently opened as the anchor to the new Hall Road district centre in Norwich (see image on previous page) can be seen as a reflection of the smaller-format 'main' stores now pursued by operators: the store covers an area of approximately 35,000 sq.ft (3,250 sq.m), whereas the company's older Norwich store at Drayton High Road, which opened in 1983, covers an area of approximately 82,500 sq.ft (7,700 sq.m).

3.25 Operators with 'hyper-market' format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, Sainsbury's are rolling out in-store Argos and Habitat concessions within their larger stores following their acquisition of these brands in 2016. Some large branches of Tesco Extra include either concessions from other Tesco-owned brands, or other fashion retailers.

- 3.26 There remains appetite from foodstore operators to open new stores where suitable opportunities arise, although as we have set out above the size of foodstores being committed to is generally smaller than has previously been the case. We expect the 'big four' retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Figure 3.3: Convenience goods market share by store format, 2016



Source: Mintel UK Retail Rankings, April 2016

Commercial Leisure

- 3.27 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience.
- 3.28 Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations. Cafes and restaurants in particular are playing an increasing role in enhancing the vibrancy of centres as they help increase dwell time and attract visitors to a centre who may not want to shop, but still want to visit a centre and socialise.
- 3.29 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that '*town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub*'. The report goes on to identify '*the need to improve the leisure and food and beverage offer, and to develop the evening economy through restaurants and in-town cinemas*'
- 3.30 The contribution which commercial leisure can make to town centres is also identified in the GLA's 'Accommodating Growth in Town Centres' study (2013). The report states that '*most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a*

replacement activity for reduced demand for space for traditional retail, and partly driven by the shift in demand to leisure expenditure as discretionary household expenditure rises.' A shift towards a broader mix in centres 'can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake 'linked trips' between retail, leisure and other uses, and increase their dwell-time in a centre. The development of a strong commercial leisure offer can also help to increase footfall outside of retail hours, for example in early evenings'. Whilst this report was a London-focussed study, the conclusions can readily be applied to the national context.



Café Bars and Coffee shops in Norwich city centre

- 3.31 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand. The popularity of specialist pubs offering craft beers and local ales also continues to grow.
- 3.32 Norwich has been in the fortunate position of being able to offer a very strong and diverse pub offer for many years, which although not wholly immune to decline in the sector has nevertheless proved to be resilient, supporting a popular annual beer festival and the complementary Norwich City of Ale event as well as a thriving local independent brewing industry. In recent years, reflecting trends seen at the national level, a growing interest in craft beer has led to expansion in this once specialist sector, shown by the establishment in Norwich of national chains such as Brewdog as well as numerous independent craft beer pubs and bars.
- 3.33 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such as Easy Gym, Gymbox and Pure Gym. This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer. A new branch of The Gym Group has recently opened as part of the new district centre in Hall Road, Norwich; the company is already represented in Norwich city centre.
- 3.34 The cinema market is also continuing to perform strongly, and in recent years has often overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK. Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate or benefits from

close proximity to complementary leisure facilities, particularly restaurants and coffee shops, enabling them to act as leisure 'destinations' in their own right. Representation from these type of 'boutique' cinema operators remains limited in the study area, however. Norwich has a number of cinema developments, including Vue and Picturehouse cinemas in the city centre, an Odeon IMAX at Riverside, and Hollywood Cinema at Anglia Square. Cinema provision in the rest of the study area is much more limited, and many of the Main Towns do not have access to cinema facilities, with the exception of Dereham and Fakenham, which both have small three-screen facilities. Outside the study area, Lowestoft, Great Yarmouth, Bury St Edmunds and King's Lynn also offer cinema facilities.

Out-of-Centre Retailing

- 3.35 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS⁸) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000. As set out in the previous section, Norwich city council has a long-standing policy approach of only permitting 'bulky goods' uses to be sold from retail parks within its administrative area.
- 3.36 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. Owners of out-of-centre retail parks are investing in their portfolios to improve their attractiveness as a 'destination', introducing dining offers, a broader tenant mix, free wi-fi and so on. An example of this is the recently-published plans for the extension of Sweet Briar Retail Park in Norwich, which in 2016 became the first out-of-centre location in the country for Ikea's trial of smaller-format click & collect-based stores.



- 3.37 A number of traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores, and Next, which has in recent years opened a regional flagship 'Next Home & Garden' store at Longwater, on the western edge of Norwich at Costessey. Other traditionally 'high street'-focussed retailers such as Debenhams, Primark and H&M also actively trade in out-of-centre locations, albeit to

⁸ The Department for Business, Innovation and Skills (BIS) has subsequently merged with the Department of Energy & Climate Change (DECC) to form the new Department for Business, Energy and Industrial Strategy (BEIS).

a more limited extent. With the exception of Next, none of these operators have out-of-town format stores in Norwich or elsewhere in the GNDP area.

4. Introduction to health checks & Norwich City Centre health check

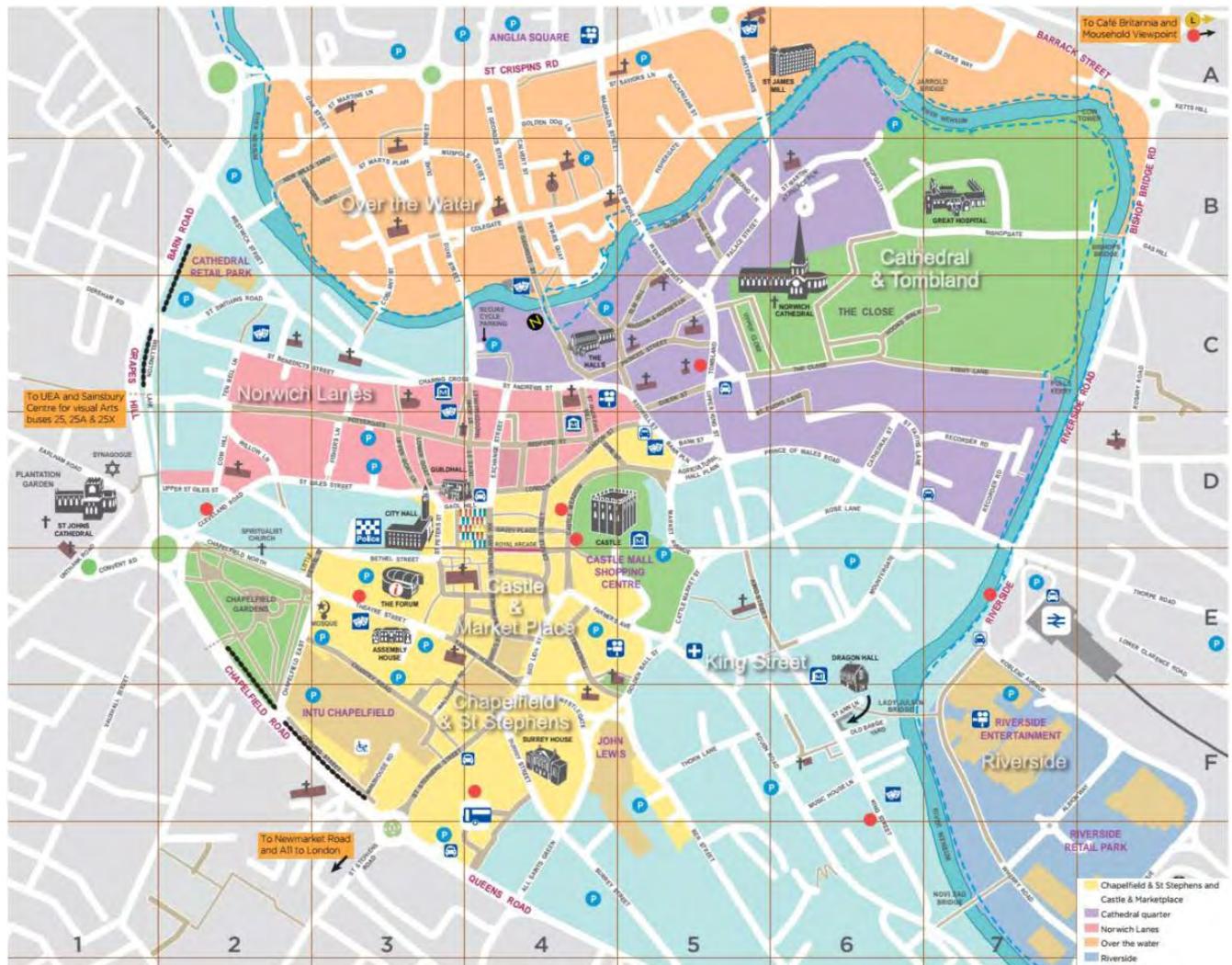
- 4.1 In Sections 4, 5 and 6 we set out 'health check' assessments of the principal centres in the GNDP area for which the study brief required consideration of, to establish their current levels of 'vitality and viability'. In this section we review Norwich City Centre; in Section 5 we consider the 'large district centres' at Anglia Square and Riverside in Norwich; and in Section 6 we consider the performance of the 'Main Towns'. Our health check assessments are proportionate to the role and function of the centre and reflective of the amount of data available to support our assessments. Where relevant, we make comparative analysis with health checks undertaken in support of the 2007 Study.
- 4.2 Our assessment of each centre is based on the 'vitality and viability' indicators for assessing the 'health' of a town centre as set out in the Planning Practice Guidance (PPG), and is based on a combination of our own assessments of the centre based on site visits undertaken in January/February 2017, and secondary data sources such as Experian Goad, who produce 'Category Reports' showing the diversity of uses in centres, CoStar/ShopProperty Commercial Property Database and IGD. It should be noted that third party data does not always directly correspond with locally-defined policy boundaries.
- 4.3 Paragraph 005 of the Planning Practice Guidance 'Ensuring the vitality of town centres' identifies the following indicators that should be used to assess the 'health' of town centres, and accordingly we structure our assessment along these lines for each centre. In some instances to avoid overlap in discussion or repetition we group indicators together for the purposes of our discussion. The PPG 'health check' indicators are as follows:
- **diversity of uses** (PPG Indicator A);
 - **proportion of vacant street level property** (PPG Indicator B);
 - **commercial yields on non-domestic property** (PPG Indicator C)
 - **customers' views and behaviour** (PPG Indicator D)
 - **retailer representation and intentions to change representation** (PPG Indicator E)
 - **commercial rents** (PPG Indicator F)
 - **pedestrian flows** (PPG Indicator G)
 - **accessibility** (PPG Indicator H)
 - **perception of safety and occurrence of crime** (PPG Indicator I)
 - **state of town centre environmental quality** (PPG Indicator J)

Norwich city centre health check

Introduction

- 4.4 For the purposes of our health check of Norwich city centre, we make reference to a number of 'character areas' in the city centre, which have different roles and functions. These are set out below, and shown in the map at **Figure 4.1**. The focus of the retail and commercial leisure offer of the city centre is contained within Chapelfield & St Stephens / Castle & Market Place (which includes Norwich Market) and Norwich Lanes, as well as Riverside, but we make reference to other areas as appropriate in our analysis.

Figure 4.1: Character areas in Norwich City Centre



Map source: Visit Norwich

- Chapelfield & St Stephens / Castle & Market Place** — the focus of the city centre retail offer, including the two main indoor shopping centres (Intu Chapelfield and Castle Mall), the pedestrianised / restricted access shopping streets of Haymarket, Gentleman’s Walk, Castle Street and St Stephen’s Street, as well as Norwich Market, The Forum (a multi-purpose venue which includes Norwich Central Library, an arts centre, BBC studios, tourist information centre, exhibition and event spaces, and business space), Norwich City Hall and the Royal Arcade, and a branch of John Lewis. This character area is bounded to the north by the Norwich Lanes (discussed below) and to the south by the city’s inner ring road. Norwich Castle abuts the eastern end of this area (note: we refer to this character area as ‘Chapelfield & Castle’ in our assessment).
- Norwich Lanes** — the focus of the specialist retail and commercial offer in Norwich, comprising of a network of narrow streets home to a wide variety of retailers, bars, restaurants and services, in an attractive bohemian setting. The majority of the offer in this part of the centre is given over to independent operators. The focal point of this area is Jarrold’s department store, a five-storey flagship store which has been trading in the city since 1823. Norwich Lanes is bounded by St Benedict’s Street to the north and St Giles Street to the south, with the pedestrianised Pottergate / Bedford Street forming the main thoroughfare through the area.
- Cathedral & Tombland** — this area contains the imposing Norwich Cathedral and Cathedral Close, form an attractive self-contained historic precinct located towards the north-east of the city centre. Tombland also

- contains a number of restaurants and bars, and the narrow cobbled streets of Queen Street, Princes Street and Elm Hill are home to a number of specialist art galleries and antique shops.
- **Over the Water** — there are limited retail/town centre uses in this area, which sits on the northern side of the River Wensum from the areas discussed above. The area is well connected and readily accessible to the retail and leisure offer in the main part of the city centre via numerous river bridges. The area also contains the shopping area of Magdalen Street, which forms part of the Anglia Square / Magdalen Street large district centre, which we discuss separately below.
 - **King Street** — this character area covers a wide area stretching east from Chapelfield & St Stephens / Castle & Market Place to the River Wensum to the east. The majority of this area is given over to offices and other non-retail and leisure uses, but the area does contain Prince of Wales Road, the principal connection between the city centre retail areas and Norwich railway station, which lies further to the east on the opposite side of the river. Prince of Wales Road is a focus of the 'night time' economy uses in the city centre, containing a number of bars, clubs and takeaways, but also has a daytime function as a hub for commercial services such as estate agents, solicitors' offices and similar supporting services.

Much of this character area is classified as a 'Office Development Priority Area' under Policy DM19 of the City Council's Development Management Policies Local Plan document, meaning that any new development on sites over 0.25ha is expected to include an element of office floorspace. As set out in Section 2, there are also a number of strategic regeneration sites within this character area which are coming forward (or are allocated to come forward) as housing and office-led development schemes, and therefore these uses (as opposed to retail and other 'main town centre uses') are expected to support the function of this part of the city centre going forward.

- **Riverside** — Riverside lies to the south-east of the city centre, adjacent to Norwich railway station, separated from the rest of the city centre by the River Wensum. It is a purpose-built retail and leisure area, with a particular focus on the latter. Riverside is home to a cinema and bowling complex, a wide range of bars and restaurants, as well as a retail park including a large Morrisons foodstore. Riverside is classified as a separate large district centre in Norwich City Council's local plan, and accordingly we consider it separately later in this section of the report.

4.5 The city centre has an active Business Improvement District (Norwich BID), which was established in 2012 and is currently balloting for a second five-year term to extend the BID to 2022. The BID covers a wide area of the city centre, including all of the Chapelfield & Castle and Norwich Lanes character areas⁹. The BID has, since its establishment, worked to improve the trading environment and implemented projects and services that enhance the city centre. It secures its funding through an annual 1% levy on the rateable value of business premises over £15,000 within the BID area. Examples of the projects promoted by the BID include:

- City centre events and festivals such as Christmas shopping, Norwich Fashion Week, Norwich City of Ale and Norwich Food and Drink Festival;
- Working in partnership with VisitNorwich to promote the city centre, including development of the VisitNorwich app, which provides event listings, an interactive map, promotions and directory of retailers;
- Development of the 'Head Out, Not Home' campaign, which promotes the leisure offer in the city centre, including bars, restaurants and theatres, to promote the city centre in the early evening (5-8pm);
- Implementation of free city centre wi-fi;
- Recruitment of 'City Hosts', stationed in the city centre every day to help visitors with enquiries and suggestions of places to visit; and

⁹ A plan of the BID geographic area can be viewed at <http://www.norwichbid.co.uk/about-the-bid/norwich-bid-area/>

- A discounted waste and recycling scheme for member businesses.

Diversity of uses, retailer representation, intentions to change representation (PPG Indicators A & E)

4.6 In order for a centre to be vital and viable, it is expected to have a broad variety of uses which enable it to meet the needs of its residents and visitors. Notwithstanding the changes in shopping patterns which we have previously discussed in this report, retail remains a key driver of footfall and accounts for the majority of units in centres. Information on diversity of uses is provided by Experian Goad, who publish annual 'Category Reports' setting out the diversity of uses in a centre, and comparisons against UK averages, for key categories including convenience goods retail, comparison goods retail, and retail and leisure services. The most recent Category Report for Norwich was published in April 2016, and the diversity of uses identified in this report are summarised in **Table 4.1**. For reference, we have also included the current UK average figures for each use, and the corresponding figures from the 2007 Study¹⁰.

Table 4.1: Diversity of uses in Norwich city centre

	Experian Goad April 2016	UK average (2017)	2007 Study	Difference 2007-2016
Convenience	5.9%	8.7%	4.6%	+1.3%
Comparison	40.9%	31.7%	41.4%	-0.5%
Retail services	11.2%	14.1%	44.2%	+0.2%
Leisure services	23.6%	23.5%		
Financial & business services	9.6% (Total svcs = 44.4%)	10.6% (Total svcs 48.2%)		
Vacant	8.8%	11.2%	9.8%	-1.0%
Total	100%	100%	100%	-

Source: Experian Goad Category Report / 2007 Study.

Note 1 – Experian Goad boundaries do not reflect policy boundaries of Norwich City Centre

Note 2 – 2007 Study figures incorporate monitoring undertaken by Norwich City Council; the 2016 Experian Goad figures do not. Caution should therefore be taken in using the figures shown in Table 4.1 as direct comparisons, but nevertheless it is considered they provide a useful guide in showing the changing composition of Norwich city centre.

- 4.7 The diversity of uses analysis shown in Table 4.1 shows that the majority of units in Norwich city centre are given over to **comparison goods uses**; these account for 40.9% of all units in the centre, almost 10 percentage points above the UK average of 31.7%. This trend is to be expected; Norwich city centre serves a region-wide shopping catchment and, reflecting the 'polarisation' trends discussed previously in this report, is a key centre which most comparison goods retailers are likely to seek representation in, on account of its extensive catchment area. Comparison goods retailers are frequently drivers of footfall in a centre and therefore strong representation in this sector should be regarded as positive. It is also noteworthy that the proportion of comparison goods uses in the city centre is virtually unchanged from the 2007 Study, when they accounted for 41.4% of uses.
- 4.8 Analysis of the Experian Category Report shows that certain comparison goods sub-categories are particularly well represented in the city centre. These include all of the clothing and footwear categories (with the exception of childrenswear) - for example 'general clothing' accounts for 2.4% of units in the centre, compared to a UK average of 1.7%; ladies clothing accounts for 4.0% of units, compared to a UK average of 2.3%. Other sub-sectors which are well represented in the city centre include antique shops, 'department & variety stores', and toys, games & hobbies', all of which post representation at least double their respective UK averages. The city centre is also particularly well provided for in terms of department stores, which are well-placed throughout the city centre and assist with the creation of a strong 'retail circuit'.

¹⁰ Please refer to the footnote of Table 4.1 for a note on the different methodological approaches adopted by the two studies.

- 4.9 **Convenience goods uses**, which include supermarkets and specialist food-shopping based stores such as bakers, grocers, delis, off licences and so on, account for 5.9% of uses in the centre, below the UK average of 8.9%. The Category Report identifies 65 convenience goods stores in the city centre, and in addition to this there is Norwich Market and convenience goods floorspace in larger stores such as Marks & Spencer. Analysis of the Category Report shows that whilst most of the sub-sectors which make up the convenience goods category (e.g. bakers, butchers, greengrocers) are underrepresented when compared to their respective national averages, there are no gaps in the offer in the city centre. There has been a slight increase in the proportion of units given over to convenience goods retail relative to the 2007 Study, reflecting trends seen at the wider level with more smaller-format convenience stores opening in town and city centres; for example Tesco, Sainsbury's and One Stop have all opened new smaller-format convenience stores or increased their representation in the city centre subsequent to the 2007 Study.
- 4.10 **'Retail services'** - which include facilities such as health and beauty services, dry cleaners, opticians, post offices and travel agents, account for 11.2% of units in the city centre, below the UK average of 14.1%. Although the proportion is slightly below the UK average there are no qualitative gaps in the offer, and for some there is extensive choice - there are 84 health & beauty services outlets, 13 opticians and 11 travel agents for example.
- 4.11 **'Leisure services'** - which includes daytime and evening economy leisure uses such as cafes, restaurants, bars, clubs, cinemas, theatres, and hot food take-aways, accounts for just under one-quarter of all units in the city centre, at 23.6%. This figure matches the UK average. The Category Report identifies the city centre contains 70 restaurants, 54 cafes and 33 bars, and the proportions of these uses in the city centre are above their respective sub-category averages. We understand from the City Council that there have been a number of new café and restaurant openings in the city centre subsequent to the 2007 Study, with many of these openings coming at the expense of retail outlets. In addition, there are 22 pubs in the city centre, accounting for 2.0% of total units in the city centre - below the UK average of 2.7%.
- 4.12 There are 43 hot food take-aways in the city centre, accounting for 3.9% of total units - although from our visits to the centre we observed that for the most part these are located in secondary/peripheral areas of the city centre, including noticeably along Prince of Wales Road, as well as on Magdalen Street (the latter of which forms part of the separately-defined Anglia Square district centre). The proportion of hot food take-aways is almost 2 percentage points below the UK average (5.7%).
- 4.13 There are 106 units given over to **'financial & business services'**, which includes banks, building societies, estate agents and employment/careers offices. This is equivalent to 9.6% units, below the UK average of 10.6%, however we would consider there to be a generally healthy mix of these type of units in the centre.
- 4.14 Services uses combined account for 44.2% of units in the centre, a change of +0.2% from the 2007 Study. As noted above, the proportion of units given over to comparison goods retail is also virtually unchanged from the 2007 Study; the centre has therefore benefited from stability in its diversity of uses over the last decade, and whilst there have of course been changes in retailers and other operators who are trading in the centre in the intervening period, there has not been the marked shift towards convenience and services which many smaller centres have seen, and the comparison goods offer of the centre has remained strong. Overall we consider Norwich city centre to benefit from a healthy diversity of uses which contributes positively to its vitality and viability.

Retailer representation by character area

Chapelfield & Castle

- 4.15 This part of the city centre is the focus of representation by national retailers. Intu Chapelfield lies on the southern edge of the city centre and has become firmly established as the principal covered shopping centre in the city centre since its opening in 2005. Anchored by a House of Fraser department store, Intu Chapelfield is also home to a strong fashion/lifestyle brand offer which also includes H&M, Zara, Apple, Hollister, River Island and so on. The lower ground floor of the centre has a more general/mainstream offer which includes Boots, Sports Direct, Flying Tiger and HMV. An outdoor restaurant area adjacent to the Chantry Road entrance to the centre (Chapelfield Plain) has attracted a number of new operators to the city in recent years, such as Carluccio's, Byron and Wagamama.



Intu Chapelfield

- 4.16 Elsewhere in this character area are a number of other high-profile stores, including a large Marks & Spencer on St Stephen's Street, Debenhams on Rampant Horse Street and John Lewis on All Saints Green - although this store feels slightly detached from the rest of the prime retail offer and from our observations at the time of our visit to the centre, appeared somewhat quieter than other parts of this character area (this may have in-part reflected the streetscape works taking place along Westlegate at the time). There is also representation from national fashion/homewares retailers such as Topman/Topshop, Next, Primark and so on. The Primark store is currently undergoing a significant extension, which will increase its GIA from 4,912 to 7,735 sq.m, a floorspace gain of 1,805 sq.m taking account of the demolition and redevelopment of the adjoining former Wallis and Dorothy Perkins stores. Some of the units occupied by national retailers are quite small and would be unlikely to be of sufficient size to enable a full product offer to be stocked, the Next store being the most notable example of this.
- 4.17 Castle Mall Shopping Centre opened in 1993, at that time the first, and for 12 years the only such covered centre in Norwich. Following the opening of Chapelfield (now Intu Chapelfield) in 2005, Castle Mall has undergone a repositioning in the market and now acts as a complementary 'secondary' shopping centre, offering neither the quality anchor stores nor the range of retailers which Intu Chapelfield presently does. The centre includes representation from stores such as TK Maxx, Argos, Boots, New Look, Flying Tiger, together with a number of mobile phone retailers and lower-quality retailers. There is a food court located on the top floor of the centre, which overlooks Norwich Castle. A Vue Cinema is located on the top floor of the development. The poorer quality shopping offer coupled with the dated interior mean that footfall in the centre is noticeably lower than Intu Chapelfield. An extension to Castle Mall is currently under construction which will create a new dining quarter ("The Terrace") with seven new restaurants, and a redesigned entrance into the centre from Timberhill. We are not aware of a fully-confirmed tenant

line-up at the time of preparation of the study, however the investment in the Centre should hopefully enable it to have a second lease of life and make a more positive contribution to the wider city centre retail and leisure circuit.

4.18 The streets which link the two shopping centres all offer a good retail, services and leisure mix, with the vast majority of units occupied by national retailers. In streets such as Castle Street the mix between retail and leisure uses is particularly apparent, and contributes to a bustling feel. The historic, ornate Royal Arcade which links Gentleman's Walk and Castle Street is an important asset to the centre but does appear to suffer from low footfall, and we understand that there has been an increase in number of vacancies here in recent months, with tenants vacating premises on account of rent increases. The retail and leisure offer on the surrounding streets attracts strong levels of footfall which do not appear to be benefiting tenants within the Royal Arcade.

4.19 St Stephen's Street is the focus of the more value/discount end of the retail offer in the city centre, with representation from operators such as Wilko, Poundland, Iceland and Argos. The large former BHS unit on the street is a prominent vacant unit which is yet to be re-let following the closure of all BHS stores in 2016. As set out in Section 2, this area forms what can be considered to be the principal large scale retail-led regeneration opportunity in the city centre.

Norwich Lanes

4.20 The Norwich Lanes area is the focus of the city centre's independent retail and leisure sector, and there are few national multiple retailers trading in this part of the centre. There is a strong mixture of boutique retailers, cafes, delis, restaurants, mostly trading from small units. The mixture of uses is interesting and there is evidence that the quality of openings in the area in recent years has been towards the upmarket end, with a number of new high-end food & beverage openings particularly apparent.

4.21 The key attractor in this area is Jarrold's Department Store - a flagship independent department store which has twice won the title of 'UK Independent Department Store of the Year'. Jarrold's styles itself as having a 'chic and quirky' mix to differentiate itself from its national operator competitors elsewhere in the city centre such as House of Fraser and John Lewis, which also have a trading presence in the city centre. The department store includes a high-end fashion department, book department, three restaurants, an in-store deli, and a standalone stationery shop.



4.22 Elsewhere in the Lanes, key streets including Pottergate, Bedford Street, London Street and St Benedict's Street all offer a positive mix of retail and leisure uses. St Benedict's Street has a particularly interesting mix, with pubs, restaurants, record shops, antique shops and arts venues (including the Norwich Arts Centre, a small concert and performance venue set in a former church) sitting alongside discount retailers such as Cash Converters.

4.23 On Guildhall Hill, on the southern edge of the Lanes (abutting the Castle & Market Place area), is a Tesco Metro supermarket. This store appeared to be trading strongly at the time of our visit with high levels of footfall observed.

King Street

4.24 The only real concentration of 'main town centre uses' in this character area is along Prince of Wales Road, which link the Chapelfield / Castle area with the railway station. There are no particular retail 'anchors' in this part of the centre; the offer is a mixture of night economy uses, some services such as estate agents, interspersed with secondary retail uses.

Cathedral & Tombland

4.25 The attractive setting of Tombland, in close proximity to the Cathedral, has attracted a cluster of national and local restaurant operators, including Gigging Squid, Prezzo and Zizzi, alongside a small range of independent specialist retailers, as set out above.



Tombland

Intentions to change representation

4.26 Information on current levels of operator demand for representation in Norwich is provided by CoStar ShopProperty. This publishes known commercial requirements from retail and leisure operators, and an indication of the size of unit the operator in question is seeking to find. It should be noted that the CoStar listings are not exhaustive; not all operators publish their requirements and others consider sites/units on an individual basis as and when they become available. In addition, the listings do not take account of demand from local / independent operators.

4.27 The most recent CoStar listings identify a total of 35 national active operator requirements for Norwich — from a mixture of foodstore operators, comparison goods retailers, leisure operators and hotel chains. The majority of the requirements could likely be accommodated in the city centre were suitable units or development opportunities to arise. The active requirements are shown in **Table 4.2**, and we draw attention to the following trends:

- Demand appears to be particularly strong from the commercial leisure sector at present, reflecting a trend seen nationally. Leisure operators with published requirements for Norwich include Chilango, The Cosy Club, and coffee chains Esquires and Costa. There is also a requirement for a new hotel for Travelodge.
- Despite having a number of foodstores trading in Norwich, there is a requirement for additional representation from Aldi, who are seeking stores of between 4,500 and 15,500 sq.ft. There is also requirement for additional representation from Sainsbury's Local.
- Comparison goods requirements do not include many 'high profile' names, possibly reflecting the fact that many established comparison goods retailers are already likely to be trading in Norwich. However requirements from emerging brands such as Oliver Bonas and Sofa.com are positive, whilst the requirement for record store / music venue Rough Trade is particularly notable, given the company currently only operates two stores outside of London — in Nottingham and New York City, with a planned opening in Bristol also recently announced. The attraction of such a brand to Norwich would represent a positive development for both the retail and cultural offer of the city centre.

Table 4.2: Published operator requirements for Norwich

Location	From ft ²	To ft ²	Class	Agent	Contact	Retailer
Norwich	5,000	9,000	All	Marston's plc	Tim Nash	Marston's plc
Norwich	1,000	2,000	A3	FML Estates	Faisal Khwaja	Al's Beef
Norwich	800	3,000	All	Colliers International	Paul Souber	Oliver Bonas
Norwich	1,000	3,000	A2	Brasier Freeth	James Oliver	Financial Services User
Norwich	2,000	3,000	A1	Brasier Freeth	Russell Jerrard	Linens Direct
Norwich	1,000	2,500	A1	Innes England Ltd	Matthew Hannah	Hilarys
Norwich	3,000	5,000	A1	Innes England Ltd	Ben Taylor	Conviviality Retail PLC
Norwich	3,500	7,000	A1	Colliers International	Hal Clarke	Sainsbury's Local
Norwich	4,000	10,000	All	Mitchells & Butlers	Alex Hill	Miller & Carter
Norwich	1,200	1,500	A1	AS Retail	Andrew Shepherd	Cards Direct
Norwich	18,300	18,500	A1	Cradick Retail	Jim Grant	Aldi Foodstore Ltd.
Norwich	2,000	4,000	A1	Cycles UK	Richard Schofield	Cycles UK
Norwich	500	700	A1	EJ Hales	Robert Hales	The Brogue Trader
Norwich	3,000	5,000	A1	Rowley Hughes Thompson LLP	Ian Hughes	Select
Norwich	600	1,000	All	JP Retail Ltd	James Peasnell	Shoon Limited
Norwich	1,250	2,000	All	GCV	Gareth Storer	Esquires Coffee Houses
Norwich	500	2,500	All	Plus Shops Retail Ltd	Kelly Jay	Chilango
Norwich	2,000	3,000	All	Five Guys	Daniel Smith	Five Guys
Norwich	2,000	6,000	A1	GVA	Jessica Hawes	Rough Trade
Norwich	2,600	3,000	A3	Cradick Retail	Jim Grant	Herbert Restaurants Group
Norwich	4,000	8,000	All	Insight Retail Consulting	Martin Bloom	The Cosy Club
Norwich	2,500	4,000	A1	SPACE Retail Property Consultants	Rob Palmer	Cycle Surgery
Norwich	12,500	20,000	A1	Robert Pinkus & Co	Joe Assalone	Better Bathrooms (UK) Ltd
Norwich	4,500	15,500	All	Aldi Foodstore Ltd	Roland Stanley	Aldi Foodstore Ltd
Norwich	2,500	7,500	A1	Cushman & Wakefield	Oliver Christy	Bagno Design
Norwich	3,500	9,000	All	Rapleys LLP	Russell Smith	Sofa.com Ltd
Norwich	2,000	3,000	A1	Brasier Freeth	Russell Jerrard	Linens Direct UK Ltd
Norwich	200	500	All	Colliers International	Bobby Blake	iSmash
Norwich	1,000	2,500	A3	Francis Darrah Surveyors Ltd	Carol Cooper	The Works Stores Limited
Norwich	850	2,000	All	Mind	Emily Morris	Mind
Norwich	30,000	100,000	Not specified	Carter Jonas LLP	Sam Turner	Travelodge
Norwich	1,000	2,000	A5	Williams Gunter Hardwick	Steve Cullis	Hotcha
Norwich	1,500	2,000	All	Brasier Freeth	Anthony Appleby	Costa
Norwich	2,500	4,000	All	Johnstone Property Consultants	Mark Johnstone	Pavers Ltd
Norwich	5,000	10,000	A3	Carter Jonas LLP	James Taylor	Greene King Plc

Source: CoStar, February 2017

Proportion of vacant street level property (PPG Indicator B)

- 4.28 Experian's Category Report (published April 2016) identifies a vacancy rate of 8.8% in the city centre. It should be noted that this vacancy rate reflects the area classified as Norwich city centre by Experian Goad, which includes the majority of Anglia Square / Magdalen Street district centre. The vacancy rate is below the current UK average of 11.2%, and also below that identified in the 2007 Study of 9.8%.

4.29 From our own observations, the vacancy rate in the prime retail area (Chapelfield / Castle) is low, with very few vacant units observed. Indeed it is apparent that many of the units identified as vacant at the time of the Experian survey have subsequently been let. We noted the following points in respect of vacant units in the city centre:

- In Chapelfield / Castle, there are prominent vacant units on St Stephen's Street on account of the closure of the large BHS store, as well as where Poundland have closed one of their two stores on the street.
- There are a noticeably high number of vacant units in Castle Mall, both to the upper and lower levels of the centre, and in both instances towards the rear of the centre. However, many of these vacancies have arisen in order to facilitate the extension works to the centre which are currently underway, as mentioned above, and we would expect these to be temporary.
- A prominent large vacant unit on Swan Lane, in the Lanes, has been let to Turtle Bay, a national restaurant chain.
- There have been several new lettings to independent retailers and operators in the Lanes, many of which are of a noticeably upmarket quality, for example a new farm shop/bistro and a specialist soya products store on Pottergate, and a specialist French food and wine shop on St John Maddemarket.

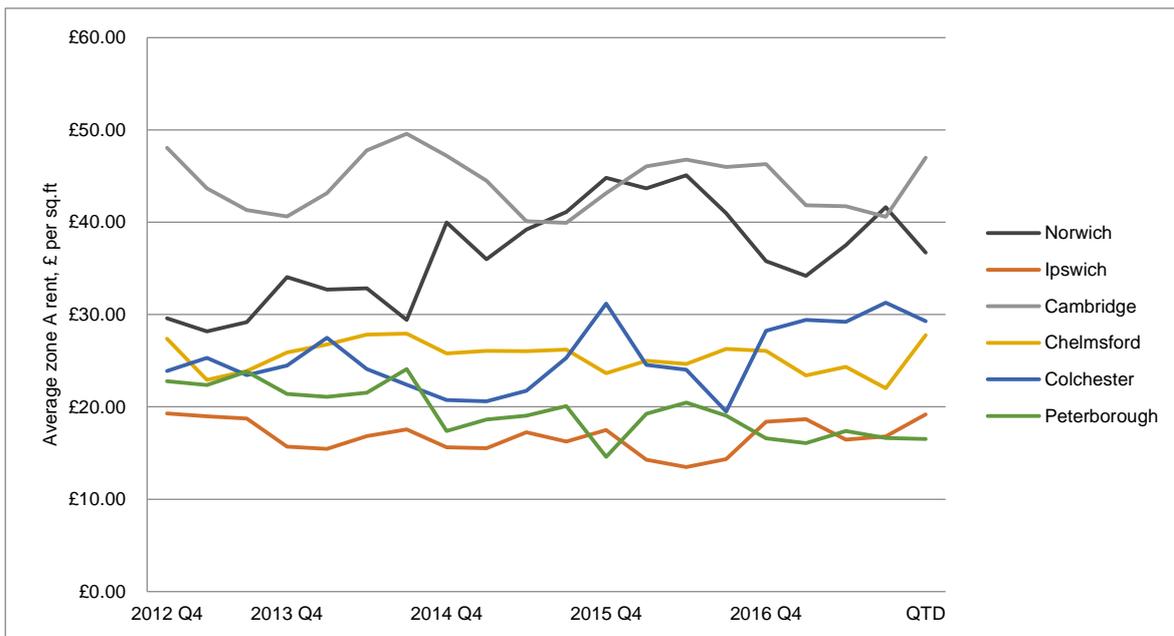
4.30 Qualitatively, the vacancy rate in the centre appears to be low and is not of a level which gives cause for concern. With the exception of Castle Mall, there are no significant concentrations of vacant units in the city centre, with those units that are vacant not making an overly negative contribution to the city centre, although the prominent vacant BHS unit on St Stephen's Street is the notable exception to this.

Commercial yields and rents (PPG Indicators C and F)

4.31 According to data from CoStar, Norwich city centre attracted a prime 'zone A' rent in the region of £37 per sq.ft in 2016. In 2015, the average zone A rent was £44 per sq.ft, and in 2014 the figure was £39 per sq.ft. Current average zone A rental values are higher than 2013 (£32 per sq.ft) and 2012 (£29 per sq.ft). The average rental rate therefore appears to be fluctuating, and it is recommended that this indicator is monitored by the Council as a repeated trend of falling rental values could indicate declining operator demand.

4.32 In **Figure 4.2**, we benchmark Norwich city centre's prime zone A rents against those for other regional comparators – Cambridge, Peterborough, Ipswich, Chelmsford and Colchester. This shows that Norwich city centre typically attracts slightly lower prime rental values than Cambridge, although the two have moved closer towards parity in the last couple of years. Colchester and Chelmsford typically attract prime zone A rents of between £20 and £30 per sq.ft, whilst Ipswich and Peterborough both attract prime zone A rents of between £15 and £20 per sq.ft.

Figure 4.2: Prime zone A rents for Norwich city centre and comparators



Source: CoStar, February 2017

4.33 Prime yields are a further useful indication of operator demand; the lower the yield, the greater the perceived attractiveness of the centre as an investment. Although information on retail yields from CoStar is more limited in its availability, the average prime retail yield for Norwich city centre in 2016 was 6.5%, higher than that of Cambridge (average for 2016 4.4%), but fractionally ahead of Colchester (6.7%), Peterborough (6.9%) and Ipswich (7.0%).

Customers' views and behaviour (PPG Indicator D)

4.34 As part of the household telephone survey undertaken in support of this study, respondents were asked whether they visit Norwich city centre for retail and leisure purposes and, if so, how often they visited, when they visited, and what they liked and disliked about the centre. A full copy of the survey results is provided at Volume 4 to the Study (see questions 15 to 25 for questions regarding Norwich). We draw out the key findings of the survey in respect of Norwich city centre below.

- Question 14 of the survey asked respondents how often they visit Norwich city centre during the daytime. 83% of the respondents from across the survey area stated they visit Norwich, although 28% stated they visit less than once a month. 18% stated that they visit once a month; 13% once a week and 13% once a fortnight. Only 2% of respondents said they visit frequently the city centre daily.
- Zones 1 to 3 of the survey area cover the Norwich urban area¹¹ and from these areas patterns of visits to the city centre were, as would be expected, different. From these zones most respondents stated they visit once a week (with a peak of 34% of respondents from zone 2). The number of respondents who stated they visit the city centre either daily or several times a week remained relatively low however. These findings confirm that Norwich city centre is first and foremost acting as a 'destination' shopping location, on account of its strong comparison goods shopping offer which our assessment has identified, rather than a 'convenience' location for which respondents visit for day-to-day goods.
- Confirming this trend further, question 15 of the survey asked respondents the main purpose of their trip to Norwich city centre, over two-thirds of respondents (70%) stated for non-food shopping. Other responses secured much lower response rates, including food shopping (5%), work (5%) and leisure activities (5%).

¹¹ See Section 6 for a plan of the survey area and zones

- However many of these other uses form important secondary or 'linked' reasons for visiting the centre (question 16): whilst 38% of respondents stated they do not undertake any secondary/linked trips in the centre, 29% of respondents stated they visit a café, pub or restaurant whilst they visit the centre, 10% undertake in a leisure activity, and 10% undertake food shopping. Non-food shopping is also identified as a secondary/linked trip response for a further 18% of respondents, confirming the important role the city centre plays in this respect. The findings of this question therefor demonstrate the importance of having a broad supporting range of uses to the non-food offer in the city centre.
- 38% of respondents stated that they 'sometimes' visit Riverside district centre as part of their visit to the city centre, and 11% 'always' visit the two locations. We discuss the role and function of Riverside separately in the following section.
- Question 17 of the survey asked respondents what they liked about Norwich city centre, with the most popular responses as follows¹²; again the answers point to the important contribution which the comparison goods offer makes.
 - 'Good range of non-food shops' (32%)
 - 'Good range of chain/well-known stores' (19%)
 - Attractive environment (12%)
 - Good quality of shops (11%)
- It is interesting to note that, notwithstanding the quality of the retail offer in the Norwich Lanes, only 7% of respondents stated they liked the good range of specialist/independent stores in the city centre.
- Question 18 asked respondents how they felt Norwich city centre could be improved. It is positive to note that 49% of respondents considered that there was 'no need to improve' the city centre, which we would consider to be a high level of satisfaction. The remaining most popular responses were mostly related to matters associated with parking, public transport and pedestrianisation:
 - More car parking (13%)
 - Less traffic congestion / better road system (7%)
 - Cheaper car parking (5%)
 - Improved bus services (4%)
 - More traffic-free areas (4%)
- When asked how long they spend in the centre (question 19), 18% of respondents stated that they spend more than 5 hours in the centre; 24% spend between 3 and 4 hours; and 27% spend between two and three hours. These are aggregate for across the whole survey area, and from those zones which cover the Norwich urban area (zones 1-3) the durations of visits are typically shorter (for example, from zone 1 29% of respondents stated they spend under two hours in the centre). This shows that residents from the outer zones in the survey area are willing to make a trip into Norwich and spend a significant amount of time in the city centre.
- Over two-thirds of respondents stated that they travel to the city centre by car (67%) a figure which rises to above 80% in the majority of the zones which fall outside the Norwich urban area, and over 90% for residents in zone 8 (Aylsham) and zone 12 (Harleston). Even for zone 2, which covers Norwich city centre and the surrounding area, 25% of respondents stated they access the centre by car — although in this zone 40% of respondents stated they walked to the centre. 19% of respondents from across the survey area stated they travelled by bus, rising to 41% for zone 3, which covers the northern side of the Norwich urban area.

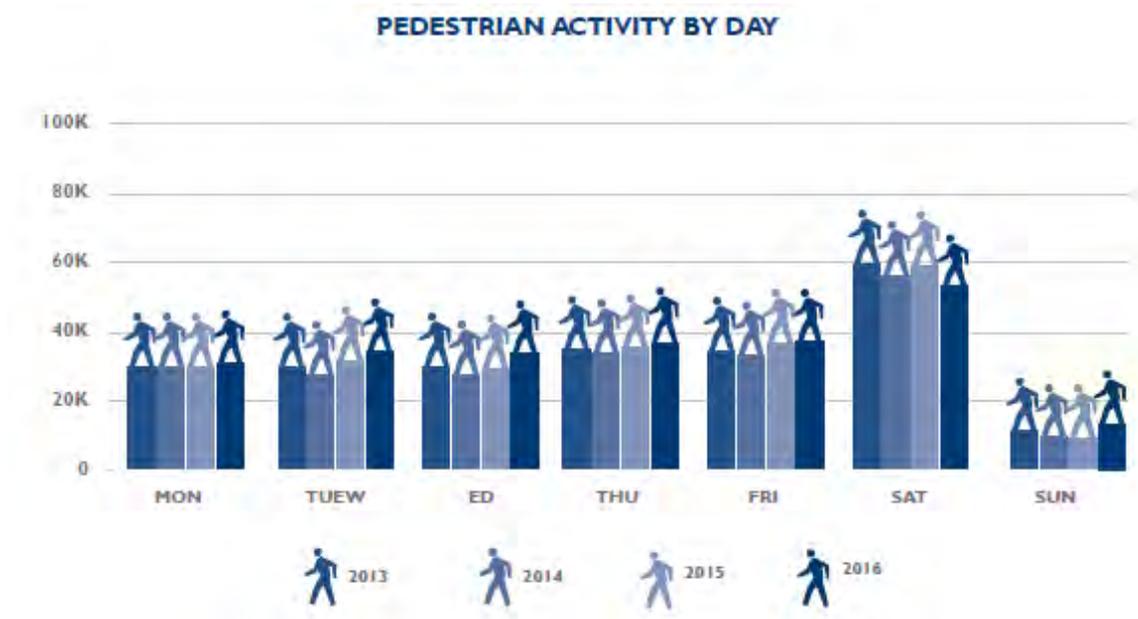
¹² Questions 17, 18 and 19 were multiple response option questions, meaning respondents could identify more than one attribute they liked/disliked about the centre. This also applies to the equivalent questions for each of the Main Towns.

- For those who stated that they travel into the city centre by car, 24% of respondents stated that they park in Chapelfield (question 21); 17% stated that they park in Castle Mall. These two locations were by some margin the most popular car parking locations in the city centre. A total of 16% of respondents stated they used various Park & Ride facilities, the most popular of these being Harford and Thickthorn (each 4%).
- The remaining questions (22-25) probed respondents' usage of Norwich city centre (including Riverside) in the evenings. When asked how often they visit the city centre in the evenings, 49% of respondents stated they never visit the centre, and 29% stated they visit less than once a month. 12% of respondents stated they visit once a month; 5% visit once a fortnight and 3% once a week. Even from those zones covering the Norwich urban area, over 50% of respondents stated that they never visit the city centre in the evenings, and, of those who do, the majority either once a month or less often.
- Question 23 of the survey identifies that for those respondents who stated they visit the city centre/Riverside, the most popular reasons for doing so were eating out (54% of respondents), visiting the cinema (44%), visiting theatres (21%) and visiting pubs (17%). Only 7% of respondents stated they came into the centre in the evenings for shopping purposes. 70% of respondents visit the city centre and 27% visit Riverside (Question 24).
- Finally, question 25 of the survey asked respondents what would encourage them to visit the city centre in the evenings more often. The vast majority of respondents (81%) answered 'nothing', which suggests there are no major qualitative gaps in the evening economy offer which require addressing. 4% of respondents (52 responses) stated that better public transport at night would encourage visits.

Pedestrian flows (PPG Indicator G)

4.35 Data from the Norwich BID (Business Prospectus, 2016) indicates that Norwich city centre had an average monthly footfall of 1,477,165 during 2016. The Business Prospectus also identifies that footfall in the city centre has increased year-on-year every year since 2014 between Mondays and Fridays, although there has been a decline in footfall on Saturdays (see **Figure 4.3** below). Saturday remains, however, the most popular day for visiting the city centre by a considerable margin, with average footfall in the region of 55,000 persons. Footfall during the week is relatively consistent at between 30,000 and 40,000 people; the city centre is noticeably quieter on Sundays.

Figure 4.3: Pedestrian footfall by day of the week in Norwich city centre, 2013-16



Source: Norwich BID Business Prospectus 2016

4.36 We made the following qualitative observations on footfall levels during visits to the city centre in January 2017. We structure our observations by character area, focussing solely on those parts of the city centre where there is a concentration of retail / leisure uses.

- **Chapelfield & Castle** -- The retail core of Chapelfield / Castle benefits from good levels of pedestrian footfall throughout. This reflects the strong retail offer in the centre, as we have set out above, and the fact that retail continue to act as the main driver of footfall, particularly in higher-order centres. At the time of our visits to the centre, pedestrian footfall has been strong virtually across the entirety of this area, particularly Gentleman's Walk / Haymarket, Castle Street, Rampant Horse Street and St Stephen's Street. The upper level of Intu Chapelfield also had good levels of footfall. The strength of footfall across much of the retail core is evidence of a strong retail circuit in this part of the centre, with 'anchor stores' well-positioned throughout the centre in order to help drive footfall.
- However, certain areas of Chapelfield / Castle do have noticeably lower levels of footfall. These include, most noticeably, Castle Mall. As we have set out above the quality of the offer in this centre is, at present, poor and there are insufficient attractors to drive footfall - despite surrounding shopping streets being busy. Level 2 of the centre is particularly quiet, which may be in part a reflection of the fact that there currently few retailers trading here on account of the extension works. However, even once these works are complete, there will be a need for the centre to improve its retail tenancy mix in order to stimulate footfall during the daytime and ensure the centre make a more active contribution to the retail circuit in the city centre.
- The John Lewis store on the southern edge of the city centre is also in an area of noticeably lower footfall, and the store and its surrounding area feel quiet. A scheme of streetscape improvement works which was taking place in the area at the time of our visit may have had a temporary impact on footfall in this area. When completed, the improvements are likely to result in a generally more accessible and attractive public realm both in the immediate vicinity of John Lewis and the main pedestrian route to and from the store (Westlegate/Timberhill).
- **The Lanes** -- The Lanes appeared, for the most part, to be busy and bustling, particularly the eastern end around Bedford Street and London Street. Some peripheral areas of The Lanes are quieter, particularly the western end of St Benedict's Street, but not to the extent where this could be considered cause for concern.
- **Cathedral & Tombland** -- this area has a much lower level of pedestrian footfall, and most of that which does occur is largely from visitors to the Cathedral or people working in the area. Tombland itself is home to a cluster of restaurants in an attractive setting, and we would expect this area to be busier in the evening. Similarly, Prince of Wales Road (King Street character area) had relatively low footfall throughout the day - despite being the main route to the railway station - but we would expect it to have higher footfall later at night owing to the bars/clubs which feature along this road.

Accessibility (PPG Indicator H)

4.37 Norwich city centre is accessible by a variety of means of transport. There are car parks located across the city centre, including large multi-storey car parks at Intu Chapelfield (1,000 spaces), St Andrews Street (on the northern edge of The Lanes, 1,084 spaces), Castle Mall (c. 800 spaces) and John Lewis (650 spaces), plus 22 surface car parks of varying capacity. A new 595-space multi-storey car park opened at Rose Lane, off Prince of Wales Road, in March 2016. We have not undertaken any assessment of car parking capacity as part of this study, although we note that some concerns in respect of car parking were identified in the responses to the household survey. **Figure 4.3** shows the location of car parking facilities in the city centre.

Figure 4.3: Parking facilities (including Park & Ride) in Norwich city centre



- 4.38 The city centre benefits from having a relatively modern bus station located on Surrey Street, in close proximity to St Stephen's Street and Intu Chapelfield. There is potential for better directional signage to be provided to this facility from across the wider city centre, and we note that enhanced pedestrian linkages between St Stephen's Street and the bus interchange form part of the Council's aspirations for the regeneration of the St Stephen's Street area, as discussed in Section 2. The Surrey Street bus station acts as the hub for longer distance and inter-urban services, as well as park and ride services. There are also bus interchange facilities at Castle Meadow and on St Stephen's Street, which are predominantly served by intra-urban services. Bus services run to and from the city centre from across the Norwich urban area, with most urban services operated by First Norfolk & Suffolk and Konect. There are also longer-distance services, including the half-hourly X1 route that runs between Norwich and Peterborough via Wisbech, King's Lynn and Dereham.
- 4.39 As shown in Figure 4.2, the city centre is also served by a network of Park & Ride facilities, with peripheral car parks at Thickethorn, Harford, Postwick, Sprowston, and Norwich Airport connected to the city centre by high-frequency bus services which typically run at 10-15 minute intervals throughout the day. Further Park & Ride facilities at Costessey provide links to the University of East Anglia and Norfolk & Norwich Hospital but do not serve the city centre.
- 4.40 Norwich railway station is located to the east of the city centre and to the immediate north of Riverside district centre. Access between the city centre is via Prince of Wales Road which is an area of the city centre which would benefit from smartening up to create a better first impression to visitors to the city centre. A number of bus routes also link the city centre and railway station. Norwich is served by mainline services to London via Ipswich and Diss, with services typically running every half an hour during the day. Journey times to London typically take 1hr 50minutes, with services operated by Abellio under the 'Greater Anglia' franchise. As part of Abellio's new franchise agreement (which came

into force in October 2016), two services to/from London each day will have a journey time of under 90 minutes. Other destinations accessible from Norwich include Sheringham via North Walsham (hourly service), Great Yarmouth via Acle or Reedham (hourly service), Lowestoft (hourly service), and Cambridge via Wymondham and Ely (hourly services). As part of the aforementioned new franchise, Norwich will gain an hourly direct link to Stansted Airport. Connections to wider destinations across East Anglia by public transport generally operate at relatively low frequencies (hourly or less), however, reflected in the fact that the household survey shows that many residents in these areas tend to drive in to the city centre.

- 4.41 Overall we would consider Norwich city centre to benefit from a good level of accessibility, particularly from within the urban area. Parking provision in the city centre appears adequate, although we have not undertaken any formal capacity assessment of provision against demand. Current parking policy in the Norwich local plan (derived from the adopted Norwich Area Transportation Strategy) seeks to cap off-street car parking capacity in the city centre to a maximum of 10,000 spaces and secure improvements to the quality, distribution and overall accessibility of the parking offer. This is being implemented alongside a programme of sustainable transport improvements including city centre traffic management, Bus Rapid Transit, cycle network improvements and streetscape enhancement.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

- 4.42 Norwich has an attractive city centre; the entirety of the city centre is designated as a Conservation Area. The historic character is evident throughout, particularly in the **Norwich Lanes**, where the narrow streets and attractive buildings create a strong sense of visual identity and sense of place. The appeal of the Lanes is aided by the fact that most of the principal streets have restricted vehicular access, which enhances the attractiveness of the area and allows for easy pedestrian movement. The Council may wish to consider whether there is scope for this to be extended to the remaining streets in The Lanes which are currently not pedestrianised, particularly Exchange Street.
- 4.43 Whilst not a particular focus for retail and leisure activity, the **Cathedral & Tombland** area benefits from the highest environmental quality of anywhere in the city centre. Focused on the Grade I-listed Anglican Cathedral, streets such as Tombland and the winding cobbled streets of Elm Hill and Princes Street are particularly pleasant, with some of the oldest buildings in the city for the most part remaining well preserved and in an attractive setting.
- 4.44 In **Chapelfield & Castle**, the environmental quality remains mostly good although visually the area looks much more 'anonymous' compared with much of the rest of the city centre. Most shopfronts are well maintained and buildings in good condition. Intu Chapelfield continues to function well as a modern shopping centre, although its lower level looks slightly tired and dated along St Stephen's Arcade (when compared with the more modern environs of the rest of the centre).
- 4.45 St Stephen's Street is a busy thoroughfare, although access is now restricted to buses only, following the granting of £2.6m of funding to remove cars from the length of St Stephen's Street in 2012. St Stephen's Street also has a number of poorer quality dated buildings, particularly towards the junction with the inner ring road. The City Council has previously acknowledged the major regeneration potential of St Stephens Street both through the St Stephens Area Outline Masterplan and allocations in the adopted local plan, and it is recommended that the area should remain identified as a significant regeneration opportunity both in the Greater Norwich Local Plan and in emerging city centre policies and strategies being taken forward by the City Council. We understand from the City Council that much of the eastern side of St Stephen's Street falls under the ownership of Aviva, with the exception of St Stephens Towers. The fact that much of the area falls under single ownership enhances the potential of the site to come forward as a redevelopment opportunity during the course of the new GNL period, and the City Council should ensure this opportunity is reflected through its emerging City Centre Strategy.

4.46 Elsewhere in the Chapelfield / Castle character area, the presence of Norwich Castle makes a positive contribution to its wider environmental quality, although Castle Meadow, which links the Castle to the shopping area, feels somewhat run down, with a number of poor quality retail units, a number of dated (and in some cases vacant) buildings and public



realm which looks tired in parts. We understand that Castle Meadow has benefited from EU investment in recent years to enhance its location as a sustainable public transport hub, which has, positively, resulted in the removal of through-traffic. Further investment in improving the appearance of the area, and particularly the quality of the public realm, would now be beneficial.

4.47 The number of buses using Castle Meadow also serves to compromise the environmental quality of this part of the centre, although we understand that the City Council intends to work with bus companies to ensure vehicle emissions standards are improved, and regulations to ensure engine switch-off are complied with. There is evidence of recent investment in the public realm in the southern end of the street, leading up from its junction with Red Lion Street, and we recommend that this could be extended along the rest of the street. Red Lion Street and particularly Timberhill are attractive shopping streets and the latter is likely to benefit from enhanced footfall once the adjacent Castle Mall extension is completed, as a new entrance onto Timberhill will be created.

4.48 In the **King Street** character area, a clear area for improvement is Prince of Wales Road, which creates a poor first impression to visitors to the city centre when arriving by rail. There are a number of poor quality and vacant/redundant buildings along the road, noticeably between its junctions with Riverside Road and Mountergate. Public realm along the length of the street is also of a relatively poor environmental quality and would benefit from 'smartening up' to create a better first impression and pedestrian route into the city centre from the railway station.

4.49 We have not undertaken any detailed assessment of crime and safety in Norwich city centre, but from our qualitative observations we did not observe any particular issues in respect of anti-social behaviour across the city centre during our visits to the centre. The centre is well-lit and appears to be extensively covered by CCTV.

Summary of vitality and viability of Norwich city centre

- Our assessment has demonstrated that Norwich city centre continues to benefit from strong levels of vitality and viability and is fulfilling a role reflective of its role and function as the highest order centre serving the sub-region. The centre benefits from a low vacancy rate although St Stephen's Street presently has two large, prominent vacant units.
- The city centre's sub-division into a number of 'character areas' helps define its multiple roles and functions and it is considered that, as part of future strategies for the city centre, these character areas are adopted and used as the basis of policy approaches.
- The retail offer continues to be comparison goods-led, notwithstanding some losses of floorspace to both convenience goods and café/restaurant uses since the 2007 Study; generally the diversity of uses in the city centre has remained stable. This is important as comparison goods continues to be the principal driver of footfall in higher-order centres, and the City Council will need to ensure this role and function is protected over the course of the new GNDP period. The findings of the household telephone survey confirm that comparison good shopping continues to be the principal reason people visit the city centre.
- The national retailer-focused comparison goods offer of the city centre is predominantly within the Chapelfield / Castle character area. Intu Chapelfield has consolidated its role as the city centre's focus for comparison goods shopping, with a strong tenant line-up. Large branches of department and high profile stores elsewhere in this character area such as Marks & Spencer, Debenhams, John Lewis and Primark help ensure a strong retail circuit exists, and the recent investment by Primark to extend their store is evidence of the strong performance of the city centre as a comparison goods shopping destination.
- Castle Mall has settled into a role of being the secondary covered shopping centre in the city, and has a noticeably lower quality retail offer and quieter footfall. However the ongoing investment to create a new restaurant quarter should hopefully provide the centre with a renewed purpose.
- The Norwich Lanes character area continues to perform strongly as the alternative to the national retailer-led offer of Chapelfield / Castle. Here, the focus of the offer is on independent / specialist retailers, and a strengthening café and dining offer, which appears to be moving noticeably upmarket. Much of the area is pedestrianised and there may be scope for this to be extended to the remaining shopping streets. The presence of the historic Jarrolds department store as the 'gateway' to the Lanes remains important.
- The city centre in its entirety is designated as a Conservation Area and most of the centre benefits from a particularly positive architectural quality, aided by the setting of the Grade I-listed Cathedral and Castle. There has been investment in improvements to the environmental quality in parts of the city centre since the 2007 Study, including public realm improvements to Castle Meadow and the removal of vehicular traffic (except buses) from St Stephen's Street. There are areas where further enhancements to the physical appearance of the streetscape may be beneficial, particularly along Prince of Wales Road which acts as the gateway to the city centre when arriving from the railway station.
- The city centre benefits from a good level of accessibility, particularly from within the Norwich urban area, with a network of high-frequency bus routes and park & ride facilities serving the centre. Norwich has a wide comparison goods shopping catchment but, as the health check assessments in the following sections identify, public transport connections with the surrounding network of Main Towns and villages are in some cases limited.

5. Norwich large district centres health checks (Riverside & Anglia Square)

5.1 In this section we consider the role and function of the two policy-defined 'large district centres' which fall within the Norwich City Council area, at Riverside and Anglia Square. Both enjoy a close functional relationship with the city centre, and are accessible by foot and public transport from the prime retail areas in the city centre. However both have distinct roles and functions — Anglia Square as a location for meeting more localised shopping needs, and Riverside as a retail warehouse-format development and a secondary hub for commercial leisure activities — which ensure that they, for the most part, complement rather than directly compete with the main city centre offer.

Riverside health check

5.2 Riverside is a purpose-built district centre located to the eastern side of Norwich city centre. Whilst treated as a separate centre in terms of its position within the city's retail hierarchy by Norwich City Council (classified as 'large district centre'), Riverside benefits from a close functional relationship with the wider city centre, being linked to the city centre by Prince of Wales Road, and also via the Novi Sad Friendship Bridge across the River Wensum, which in turn links into King Street. As our health check of the city centre above has set out, Prince of Wales Road is home to a concentration of bars and other night-time economy venues, and provides a direct link between the city centre, Riverside and Norwich rail station.

Diversity of uses, retailer representation, intentions to change representation (PPG Indicators A & E)

5.3 Riverside is untypical in its composition and appearance for a district centre; it is focused on a collection of retail warehouse-format units, a Morrisons supermarket and a range of commercial leisure uses, but nevertheless manages to offer a reasonably broad diversity of uses. The diversity of uses (based on Experian Goad's survey of the centre in 2015) is as follows, and with the exception of the vacant unit remained unchanged at the time of our visit¹³:

- Comparison goods: 12 units;
- Convenience goods: 1 unit;
- Retail services: no units;
- Leisure services: 14 units;
- Financial and business services: no units;
- Vacant: 1 unit (this has since been occupied by Mothercare)

5.4 The only convenience store serving the centre is a large Morrisons store, located on the eastern edge of the centre on Koblenz Avenue. The store is a popular food shopping destination,



Morrisons, Riverside

attracting the third-highest turnover of any foodstore in the Norwich urban area, based on the findings of the household survey undertaken in support of this study.

¹³ Given the unique nature of this centre and the low overall number of units in the centre we do not benchmark against Experian Goad averages in this instance.

5.5 The comparison goods offer of Riverside is set in two terraces of retail warehouse-format units widely known as Riverside Retail Park. These sit to the west and south of the Morrisons store. The offer is predominantly 'High Street' in nature, in contrast to the other retail parks in the city where the retail mix is principally geared towards 'bulky goods', and we understand that both terraces benefit from open A1 planning consent. Comparison goods retailers currently trading are Argos, B&M, Boots, Card Factory, Clarks, H&M, Hobbycraft, Matalan, Mothercare, Next, Nike (Outlet Store), Outfit (which includes Arcadia Group stores such as Topshop, Topman, Burton and Dorothy Perkins), Poundland and Carphone Warehouse. There is a considerable degree of overlap with the comparison goods offer of the city centre, and the majority of comparison goods retailers trading at Riverside also have stores trading in the city centre.



Riverside

5.6 The leisure offer sits to the rear of the western terrace of retail units, and occupies the entirety of the northern half of the district centre, closest to both the city centre and the railway station. The leisure offer is anchored by a 14-screen Odeon IMAX cinema, and also includes a Hollywood Bowl bowling alley and nightclub ('Wonderland'). Supporting these leisure facilities are a range of family dining restaurants, predominantly operated by national operators, such as Nando's, Las Iguanas, TGI Fridays, Pizza Hut, Chiquito and Bella Italia. There is also a public house ('Queen of the Icenii') and a health and fitness club. The results of the household survey undertaken in support of this study confirm the popularity of Riverside as a leisure destination, particularly in respect of the Odeon, which attracts over 50% of the cinema market share from the survey area used as the basis of the assessment.

5.7 In addition, in the Retail Park element of the district centre, there are branches of Costa and Starbucks coffee shops, the latter being a recent addition to the offer of the centre, with planning permission granted for two small units by Norwich City Council in 2015. There are, however, no retail services or financial/business in the centre (such as hairdressers, travel agents, estate agents, banks and building societies for example); in a 'typical' district centre such uses would be expected to be well represented and therefore this can be considered to represent a qualitative gap in the offer of the centre.

5.8 There are also no small-scale/specialist retailers trading in the centre which enable more day-to-day shopping needs to be met. There is an increasingly substantial residential community in the immediate area, particularly along Geoffrey Watling Way, and at present the only shopping facilities these residents are able to utilise within the immediate area are those at Morrisons / the retail park. The retail park offer is, as discussed below, more orientated towards being a 'destination' location where shoppers travel to relatively infrequently. That said, the presence of retailers such as Boots, Poundland and Morrisons mean that some day-to-day shopping needs are being met.

5.9 We have not been able to source any information on currently retailer/operator requirements for Riverside.

Proportions of vacant street level property (PPG Indicator B)

5.10 No vacant units were observed in the centre at the time of our visit. The vacant unit at Riverside Retail Park identified at the time of the Experian Goad survey has subsequently been let to Mothercare.

Commercial yields and commercial rents (PPG Indicators C and F)

- 5.11 We are not aware of any published data in respect of these indicators for Riverside district centre.

Customers' views and behaviour (PPG Indicator D)

- 5.12 The household survey probed on patterns of usage of Riverside district centre. 58% of respondents to the survey who use Riverside stated that they visit during the day, but for most respondents these visits were relatively infrequent. 5.9% of respondents visit once a week during the daytime; 6.1% visit once a fortnight; 11.8% visit once a month; and 31.2% visit less than once a month. This confirms that Riverside, untypically for a district centre, acts as a 'destination' shopping location rather than one where residents visit frequently for day-to-day shopping and services needs. The nature of the retail and leisure mix at Riverside is conducive to it performing this role and function as more of a 'destination' location.
- 5.13 For those that visit Riverside during the daytime, 10.7% of respondents stated that they always visited Norwich city centre as part of the same shopping trip; just over one-third 'sometimes' visit the city centre (37.8%) however over half (51.3%) never combine trips to the two locations.
- 5.14 The household survey also identified that of people who visit Norwich city centre in the evenings, 26.4% visit Riverside, compared to 70.0% who visit the city centre. There appears to be relatively little evidence of the two locations attracting combined trips — just 0.9% of respondents stated they visit both — possibly reflecting the fact that there is quite a long walk between parts of the city centre and the Riverside, despite connections being, as we have established, relatively strong.

Pedestrian flows (PPG Indicator G)

- 5.15 We are not aware of any pedestrian flow counts which have been undertaken in the centre. The retail park element of the centre appears to principally attract car-borne visits and there was relatively limited evidence of pedestrian movements across the site between the retail terraces or between Morrisons and the retail park. However, individual stores were noted to be generally busy, particularly in the case of the Morrisons store. The leisure element of the centre is much more conducive to encouraging pedestrian flows on account of its pedestrianised nature, and whilst it was quiet at the time of our visit during the daytime, we would expect it to be significantly busier during the evening, which represent the prime trading hours for the bars, restaurants and leisure developments here.

Accessibility (PPG Indicator H)

- 5.16 Accessibility to the centre can be considered positive. The centre lies within a few minutes' walk from Norwich railway station, and there are strong pedestrian linkages between the station and the centre. A number of bus routes run through the site, including First Norwich's Blue Line 25/26 services, which provide high frequency services (up to every seven minutes) between Riverside and the city centre, and onwards to the University of East Anglia and Norwich & Norfolk University Hospital, via Earlham Road/Unthank Road. As mentioned above, there is a considerable amount of car parking available, with surface car parks adjacent to the Morrisons / retail terraces, and a multi-storey car park located to the rear of the Odeon. Parking charges for the multi-storey are refunded for visitors to the cinema/bowling facilities, but not for those just visiting the restaurants or other uses in the centre.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

- 5.17 The centre benefits from a generally acceptable environmental quality although this needs to be seen in the context of the fact that the centre is orientated towards those who visit by car. The two retail terraces are separated from one

another by an extensive area of car parking and the thoroughfare of Albion Way, although the car parks are adequately landscaped and there are pedestrian crossing points. A stronger environmental quality befits the leisure area of the centre, with the restaurants and cinema set either side of a pedestrianised street which forms the main access into the centre when approaching on foot from the city centre/railway station. Although the quality of the public realm errs towards the functional side (as is the case throughout the centre) this part of the centre generally leaves a positive impression. No areas of concern were identified in respect of the safety of the centre.

Summary of vitality and viability of Riverside district centre

- Riverside district centre is an untypical district centre, centred around a large Morrisons supermarket, retail warehouse-format units and a popular commercial leisure offer which includes an Odeon IMAX cinema, bowling alley and several family dining restaurants. The comparison goods offer is entirely devoted to national retailers and overlaps with that of the city centre, with many retailers trading in both locations.
- There are qualitative gaps in the offer for what we would expect a 'typical' district centre to contain, for example a complete absence of retail services such as hairdressers, beauty salons and banks for example. There are also no small-scale shops which enable day-to-day shopping needs to be met, with the size of retail units and national operator-led tenant mix meaning that the centre acts as more of a 'destination', a finding supported by the household survey results showing frequency of visits to the centre. The growing residential population in the immediate area means it would be desirable for a range of these types of uses to be provided.
- Nevertheless the presence of retailers such as Boots and Morrisons in the centre does mean there is an element of shopping provision which is reflective of its role and function as a district centre.
- The leisure offer is strong, with the combination of Norwich's biggest cinema and a number of family dining restaurants, plus other factoring such as free parking, mean that visiting Riverside for leisure trips is likely to be an attractive proposition for many residents, although clearly the depth and range of offer is not comparable to that of the city centre.

Anglia Square health check

- 5.18 Anglia Square is situated to the north of the city centre, and falls partly within the Over the Water character area (see map at Figure 4.1 in Section 4). The boundary of the district centre covers the purpose-built Anglia Square shopping centre, plus the traditional linear shopping street of Magdalen Street, which links Anglia Square with the city centre on the opposite side of the River Wensum, and a second specialist shopping street - St Augustine's Street - which lies to the north-west of Anglia Square.
- 5.19 Anglia Square shopping centre was built in the 1970s and has long been identified as a redevelopment opportunity by the City Council, as set out in Section 2. The shopping environment is dated and clearly in need of updating, although the centre continues to benefit from a high level of retailer occupancy. Magdalen Street and St Augustine's Street are both more traditional in nature, containing mostly small, independent shops, interspersed with some residential properties.

Diversity of uses, retailer representation, intentions to change representation (PPG Indicators A & E)

- 5.20 Experian Goad include parts of Anglia Square district centre within their Goad plan of Norwich city centre, however this omits the retail and services uses along St Augustine's Street. Our diversity of uses assessment is therefore

qualitative in nature, based on our assessment of the centre undertaken in January 2017, and drawing on Experian Goad data where relevant.

- 5.21 The largest retailers trading in the centre are branches of Roys of Wroxham (on Magdalen Street) and QD Stores (in Anglia Square Shopping Centre). Both are variety stores, selling ranges of homeware, garden/outdoor products, toys, DIY goods, furniture and so on, with Roys also carrying a range of fashion, health and beauty items.
- 5.22 Other key retailers in the centre include Poundland (which has upsized its presence in the centre in recent years following the company's merger with 99p Stores), Poundstretcher, Boots, Savers and Iceland, all of which are located in Anglia Square shopping centre. The overall quality of the retail offer in Anglia Square shopping centre is towards the discount/value end of the spectrum. A number of units within the shopping centre are occupied by charity shops. There is a cinema on the upper floor of the shopping centre which the household survey results identify attracts relatively strong localised market shares, possibly aided by the fact its price point is cheaper than other alternatives in the city. Foodstore provision is restricted to the aforementioned Iceland store and a better level of consumer choice in this respect would be beneficial.
- 5.23 The majority of the retail offer along Magdalen Street comprises independent operators. On the northern stretch of Magdalen Street (north of St Crispins Road) the offer is orientated towards day to day shopping needs, with a number of small newsagents/convenience stores, betting offices, beauty salons and so on. South of St Crispins Road the offer becomes more diversified and specialist, with an extensive array of restaurants (particularly towards the south of centre), household/second hand goods stores, a record shop, vintage clothing stores, hairdressers, European food supermarkets and so on. A speciality coffee shop and upmarket barbers/grooming salon are two recent additions to the offer of the centre. The independent stores which line Magdalen Street make an important contribution to the overall vitality and viability of the district centre.
- 5.24 St Augustine's Street is principally orientated towards retail and leisure services, and includes an opticians, estate agents, hairdresseers, an Indian restaurant, cafe and public house. These are spread sporadically along the road and interspersed with a number of units which appear to be in use as offices. A Spar store located to the north of the centre, at the junction with Aylsham Road, enables local shopping needs to be met (this store falls just outside the defined district centre boundary).
- 5.25 We have not been able to source any information on currently retailer/operator requirements for Anglia Square.

Proportions of vacant street level property (PPG Indicator B)

- 5.26 As discussed above, there is no Experian Goad plan which specifically covers this district centre which enables a vacancy rate in percentage terms to be identified. However, from our visits to the centre, we have observed the vacancy rate to not be of a level which represents cause for concern although it is higher than much of the wider city centre. Anglia Square itself has two vacant units - the former Poundland store and an adjacent former womens clothing store.
- 5.27 There are three vacant units located on the northern part of Magdalen Street, including a former public house. On the southern part of Magdalen Street there are again a handful of vacant units, located towards the south of the centre, although it is positive to note that a former vacant restaurant has recently been let to Three Magdalen Street, a contemporary art gallery.

Commercial yields and commercial rents (PPG Indicators C and F)

- 5.28 We are not aware of any published information in respect of rents and yields for Anglia Square.

Customers' views and behaviour (PPG Indicator D)

5.29 The household telephone survey undertaken in support of this study sought to establish patterns of, and reasons for, usage of the district centre. The key findings from the survey results are as follows:

- **Frequency of visit:** Of the 1,500 respondents to the household survey, 11.9% (179 respondents) stated they visit Anglia Square. Of these, 21.5% visit the centre once a week or more, and almost half (49.5%) visit once a month. When asked how long they typically spent in the centre, consistent with its role and function as a district centre, the majority of visits are relatively short stay. Two-thirds of all users (66.7%) spend under two hours in the centre.
- **Main purpose of trip:** When asked what the main reason for visiting the centre was, 56.2% of respondents stated non-food shopping and only 16.7% stated food shopping, the latter reflecting the fact that there is only one small supermarket (Iceland) serving the centre. 4.8% of respondents were visiting a financial services facility (e.g. a bank/post office).
- No other reasons for visit attracted a noteworthy market share, suggesting that the retail function of the centre is particularly important in supporting its vitality and viability, and that there are limited other facilities in the centre which act as attractors.
- **Linked trips:** 59.8% of respondents do not undertake any 'linked trips' with other facilities in the centre, the highest figure of any of the centres surveyed in this study. This again suggests that the non-retail offer in the centre is limited and the centre may benefit from further diversification of uses. 10.2% of respondents visit a cafe or restaurant in the centre as a linked trip, however.
- **Likes:** When asked what they liked about the centre, encouragingly 16.5% of respondents stated that they liked the range of non-food shops and 9.7% stated that they liked the range of specialist/independent stores in the centre, confirming the importance which the centre's specialist retail offer makes to the overall vitality and viability of the centre. 7.4% of respondents liked that it was easy to park, and 7.9% of respondents liked that the centre offered low/discount prices. Almost one-third (32.1%) of respondents stated that there was 'nothing' they liked about the centre.
- **Areas for improvement:** In terms of how the centre could be improved, 32.7% of respondents stated that there was no need for the centre to improve. However a substantial proportion of respondents (28.2%) stated that there was a need to improve the environment/appearance of the centre, and 12.5% stated the maintenance/cleanliness of the centre needed improvement.

Pedestrian flows (PPG Indicator G)

5.30 We are not aware of any pedestrian flow counts which have been undertaken in the centre. Pedestrian flows throughout the centre appeared, at the time of our visit, moderate in most parts, although the northern section of Magdalen Street appeared noticeably busier. Pedestrian footfall reduced further south along Magdalen Street, but we would expect this area to also attract footfall during the evening owing to the presence of a number of restaurants.

Accessibility (PPG Indicator H)

5.31 Anglia Square benefits from what can be considered to be a good level of accessibility. There is extensive car parking available in the centre, a mixture of surface car parking on the edge of the centre, whilst Anglia Square itself contains a multi-storey car park. Buses run along both Magdalen Street and St Augustine's Street, linking the centre to the city centre to the south and nearby residential areas. The majority of bus routes which leave the city centre heading north pass through the centre. The centre is approximately 15 minutes' walk from the railway station, although the nature of

the retail offer in the centre is such that it is likely to cater towards meeting local shopping needs rather than being a 'destination'.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

- 5.32 The 2007 Study commented on the environmental quality of Anglia Square Shopping Centre as being poor, noting that *'from the outside, the Anglia Square Shopping Centre appears outdated and in need of investment. Linkages and entrances into the Shopping Centre are also poor. There is a significant amount of vacant and derelict office floorspace which detracts from the environment'*. These conclusions continue to remain applicable. Within the shopping centre the public realm is generally satisfactory, with the street furniture fulfilling its role effectively. It had recently been upgraded at the time of the 2007 Study.
- 5.33 Elsewhere in the centre Magdalen Street continues to have an appearance which errs towards the functional in the area north of St Crispins Road, particularly in terms of the appearance of some of the units and shopfronts in the centre - although some of the businesses which have opened in the centre, e.g. the Cactus Cafe, make a positive contribution to the street scene. The environmental quality of the centre improves quite considerably further south along Magdalen Street, with a mixture of more historic buildings, a better quality retail offer and more contemporary, well-maintained shop fronts all serve to enhance the area's environmental quality.
- 5.34 St Augustine's Street benefits from well-maintained pavements and public realm, but is again comprised by the poor physical appearance of a number of units.

Summary of vitality and viability of Anglia Square district centre

- Anglia Square district centre continues to function with generally satisfactory levels of vitality and viability. The 1970s purpose built shopping centre is aesthetically unpleasing and performs a retail function which is little more than functional, but positively does benefit from some reasonably-sized units. The 'anchor' stores to the centre are relatively poor, although reflective of the offer of this part of the centre as a focus for discount/value retailing. Proposals for redevelopment of the centre are long-standing and should remain a priority for Norwich City Council over the new GNLP period.
- Magdalen Street also continues to perform adequately in its northern half (adjacent to Anglia Square), where there is a need for improvements to the appearance of some of the units. Progressing along the southern portion of the street, the retail offer becomes more specialist/unique, and appears noticeably more upmarket and the overall vitality and viability of the centre feels stronger. The presence of a number of restaurants in this part of the centre adds to the diversity of uses in the centre which is otherwise largely reliant on retail uses.
- The main qualitative gap is the lack of consumer choice for food shopping, with shopping needs currently only being met by a small Iceland store. This was also identified as a constraint to the vitality and viability of the centre in the 2007 Study. Although there may no longer be market appetite for a large supermarket at this location, the need to improve and diversify the convenience goods offer remains.
- The environmental quality of the centre is adequate, but improves southwards along Magdalen Street. The imposing Shopping Centre with its under-used upper floors does not fit in with the surrounding and compromises the wider area's environmental quality.

6. 'Main Towns' & large villages health checks (Aylsham, Diss, Harleston, Loddon, Long Stratton and Wymondham)

6.1 In this section we present 'health check' assessments of the 'Main Towns' of Aylsham (in Broadland District) and Diss, Harleston and Wymondham (in South Norfolk District). We also present high-level assessments of the two 'large villages' which this study was required to consider, Loddon and Long Stratton in South Norfolk. Our structure follows the same format as that set out in the previous chapters, and each assessment is again structured around the PPG 'health check' indicators, although it should be noted that performance data which is available for a number of these centres is limited.

Aylsham health check (Broadland district)

6.2 Aylsham is the only Main Town considered as part of this study which falls within Broadland District. Located to the north of Norwich, its attractive Town centre offers a range of day-to-day shopping facilities, clustered around active frontage on Red Lion Street, Penfold Street and the Market Place. The town centre extends to 84 units. The centre benefits from proximity to a number of tourism assets, including the Bure Valley, a 15-km heritage railway which runs between Aylsham and Wroxham through the Norfolk Broads, and Blicking Hall, a National Trust-run stately home and gardens in the village of Blicking, to the north of Aylsham.



Market Place, Aylsham

Diversity of uses, retailer representation and intentions to change representation (PPG Indicators A and E)

6.3 The most recent survey of Aylsham town centre was undertaken by Experian Goad in October 2015. This survey recorded 84 units within the town centre, totalling 8,919 sq. m gross of retail/ service floorspace. As **Table 6.1** shows, 34.5% of the units are occupied by comparison goods retailers, 15.5% by convenience retailers and 19.1% by retail service operators. These proportions are all above their respective UK averages; significantly so in the case of convenience goods retail provision. Whilst financial and business services are broadly on par with the UK average, leisure services are at 14.3% (12 units), 9.2% below the UK average. Aylsham functions as a centre that serves local need for residents within the town and local villages, and whilst it therefore would not be expected to provide a significant leisure offering, this does represent a significant shortfall against the UK average. Whilst another café unit

had become vacant by the time our surveys were undertaken, those leisure services that remained within the centre looked to be performing strongly and were being well used; the centre's proximity to the aforementioned tourism assets could potentially contribute to this.

Table 6.1: Composition of units in Aylsham town centre

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	29	34.5	31.7	+2.8
Convenience	13	15.5	8.7	+6.8
Retail Service	16	19.1	14.1	+5
Leisure Services	12	14.3	23.5	-9.2
Financial & Business Services	9	10.7	10.5	+0.2
Vacant	5	6	11.2	-5.2
Total	84	100	100	-

Source: Experian Goad Category Report (October 2015)

6.4 The centre has representation from a handful of national retailers including Budgens, Co-op and McColls supermarkets. Whilst the Co-op is centrally located in the Market Place and provides a 'top up' shopping, the Budgens store, on the southern boundary of the centre, provides a wider provision of goods and services, with a delicatessen, bakery and a Post Office in the store. We would consider both the Budgens and Co-op stores to act as the town centre's 'anchor' retailers. Located outside the town centre boundary is a Tesco supermarket, which appeared busy at the time of our visit. Other than these national retailers, the majority of other units in Aylsham were independent retailers. Positively, the town centre also contains two banks, operated by Barclays and Santander, in an era where many centres the size of Aylsham have lost banking facilities.



6.5 The CoStar Commercial Property Database identified limited demand from national operators seeking representation in Aylsham; given the role and function of the centre, and the trends discussed earlier in this report regarding the polarisation of retailers towards larger centres, this is not particularly surprising and in reality we would expect the majority of demand to come from the independent retail sector. However there is a requirement for a unit of between 1,500 sq.ft and 2,000 sq.ft from Costa, as well a requirement from public house operator Marston's.

Proportions of vacant street level property (PPG Indicator B)

6.6 The Experian Goad survey (2015) identified a vacancy rate of 6%, which is below the current UK average (11.2%). This is equivalent to five vacant units. From our survey, the number of vacant units still remains at five, albeit different retail units have become occupied and vacant. The centre has gained a financial services unit through the conversion of a residential dwelling. The vacant units were dispersed across the centre with no particular concentrations apparent. We do not consider the vacancy rate to present cause for concern.

Commercial yields and commercial rents (PPG Indicators C and F)

6.7 Due to the size of Aylsham, there is very little data record of commercial rents over the past five years. However, the CoStar Commercial Property Database identified a prime commercial rent of £13 per sq.ft for Aylsham in 2016.

Customers' views and behaviour (PPG Indicator D)

6.8 The household telephone survey undertaken in support of this study asked users of Aylsham town centre what they use the centre for, and what they liked and disliked about the centre. The key findings of the survey were that:

- **Frequency of visits:** The majority of those who use Aylsham town centre do so at least once a week or more (65%), with once a week visits seeming most popular (25%). A further 14% of the respondents use the town centre less often than this, with visits occurring averagely once a month.
- **Main purpose of trip:** Reflecting the fact that there are a number of convenience goods shopping facilities in the town centre, most respondents (40%) to the survey cited food shopping as the main reason for visiting Aylsham town centre, followed by non-food shopping (16%) and then travelling to/from work (10%).
- **Linked trips:** 33% of respondents do not undertake any 'linked trips' when visiting Aylsham. For those than did undertake 'linked trips', 18% undertake non-food shopping, 17% visit a café/pub/restaurant and 16% undertake food shopping.
- **Likes:** Respondents were asked what they liked the most about Aylsham, with 27% saying it was the attractive environment and 18% saying it was because it was close to home. 12% stated that it was the good range of specialist/independent stores and the centre being not too busy or overcrowded that made Aylsham likeable.
- **Areas for improvement:** With regards to how Aylsham town centre could be improved, it is apparent that levels of satisfaction with the centre are generally high. Respondents' most frequently cited response was more car parking (14%), followed by a better choice of shops (4%). More specific improvements respondents outlined were the need for a petrol station (4%), fewer housing developments (4%) and less traffic congestion/ better road system (3%), however each of these points attracted a low number of responses.

Pedestrian flows (PPG Indicator G)

6.9 We are not aware of any formal pedestrian flow counts which have been undertaken in the centre. Qualitatively, localised pedestrian flows were noted during our visit to the centre, with a good level of pedestrian movement occurring for the time of day/week. Although the Budgens store was busy, there was a notable amount of traffic and pedestrian flow around the Tesco store located outside of the town centre.

Accessibility (PPG Indicator H)

6.10 Aylsham town centre has a reasonable provision of free parking, available at Burgh Road (57 spaces) and the Market Place



Red Lion Street, Aylsham

(40 spaces), plus a 58-space car park on the edge of the centre at Buttsland. The Budgens store also has a non-restricted car park. At the time of visiting, no particular issues in respect of congestion were observed, with traffic flow being relatively low except for when large vehicles, such as tractors, passed through the centre — although we note that some respondents to the household survey identified that parking provision in the centre could be improved. Aylsham and Norwich are connected by a main arterial route, the A140, which has regular bus services operating between the two centres. These operate every 30 minutes during the day, which is a higher level of service than some of the other Main Towns. Services only run until 6pm, however.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

6.11 Aylsham is an attractive, historic centre, with a well-maintained town centre environment. The entirety of the centre falls inside the Aylsham Conservation Area. The centre has a vast number of different age buildings, which as a result means there is no centre-wide standard to shopfronts. Whilst differing in style, the majority of frontages are well maintained and do not distract from the centre's historic assets.

Summary of vitality and viability of Aylsham town centre

- Aylsham displays mostly positive signs of vitality and viability. The centre has both a good-sized Budgens and smaller Co-Op store which act as 'anchor' stores and there is a range of shopping and retail services which enable some local/day-to-day shopping needs to be met. It is evident that the vitality and viability of the centre is underpinned by its convenience shopping role. This was apparent from our own observations as well as the findings of the household telephone survey.
- There is an under-provision of leisure services – such as café's, bars and restaurants – in the centre. Further uses of this nature would help support the retail function of the centre and encourage further 'linked trips' and longer dwell times within the centre.
- The majority of the offer in the centre comprises of independent operators, which helps provide a diverse mix of uses and differentiate the town from larger, higher-order centres. This role and function of the centre should be supported and where possible enhanced.
- Vacancy levels have been consistently low over the past couple of years, with the current vacancy rate comfortably below the UK average.
- The environmental quality of the centre is good, with the centre benefitting from a historic environment, a good level of cleanliness, and no major issues of traffic congestion, although some respondents to the household survey suggested that the centre would benefit from more car parking provision.

Diss health check (South Norfolk District)

6.12 Diss town centre is situated within South Norfolk District, approximately 34 km south of Norwich. The town centre's retail offer is focused on Mere Street, which merges into Market Place and then Market Hill. St Nicholas Street also contains a range of retail uses. The centre contains an Aldi supermarket and there are large branches of Tesco and Morrisons supermarkets to the south of the town centre, both of which are located in an edge-of-centre location but within the town centre boundary.

Diversity of uses, retailer representation and intentions to change representation (PPG Indicators A and E)

6.13 The most recent Experian Goad survey of Diss town centre was undertaken in December 2015. According to this, the centre consists of 176 units and 35,043sq.m gross retail/service floorspace. When splitting these units down, as **Table 6.2** identifies, 35.8% are occupied by comparison goods retailers, 10.8% by convenience retailers and 14.8% by retail service units. The proportion of these uses are all above their respective UK averages. Financial and business services are also above the UK average, but leisure services (such as cafes and restaurants) fall 5.9% below the UK average. Diss town centre has 31 leisure services units; whilst proportionally this figure falls below the UK average, qualitatively we observed that the majority of these units were independent operators and seemed to be performing well on the day of our visit.

Table 6.2: Composition of units in Diss town centre

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	63	35.8	31.7	+4.1
Convenience	19	10.8	8.7	+2.1
Retail Service	26	14.8	14.1	+0.7
Leisure Services	31	17.6	23.5	-5.9
Financial & Business Services	25	14.2	10.5	+3.7
Vacant	12	6.8	11.2	-4.4
Total	176	100	100	-

Source: Experian Goad Category Report (December 2015)

6.14 Diss town centre's retail provision has a good proportion of independent and national retailers. The centre has three main food stores, namely Tesco, Morrisons and Aldi. All three of these units are located towards the southern boundary of the town centre and are outside the primary shopping frontage. Whilst Tesco and Morrisons are easily accessible from the primary frontage, they are somewhat detached from the rest of the town centre due to the A1066. Aside from the food stores mentioned above, national retailers present in the centre include Costa, WH Smith, Specsavers and Superdrug, which are all located on Mere Street. Whilst there are a high proportion of independent retailers clustered in the



north of the centre, there are also independent units integrated into the main primary shopping frontage. This enables the centre to benefit from a good diversity of uses throughout.

- 6.15 The CoStar Commercial Property Database identifies four published retailer requirements for Diss - three comparison goods retailers: The Works (books/stationery), who are seeking a unit of between 1,000 and 2,500 sq.ft; Edinburgh Woollen Mill (clothing), who are seeking a unit of between 2,000 and 5,000 sq.ft; and charity shop Mind, who are seeking a unit of between 850 and 2,000 sq.ft. All of these operators would, we expect, be looking for representation in the town centre. There is also a requirement from supermarket operator Aldi, who are seeking a site for a store of between 4,500 and 15,500 sq.ft. The operator is already present in the centre so it is possible they may be seeking additional representation in the town.

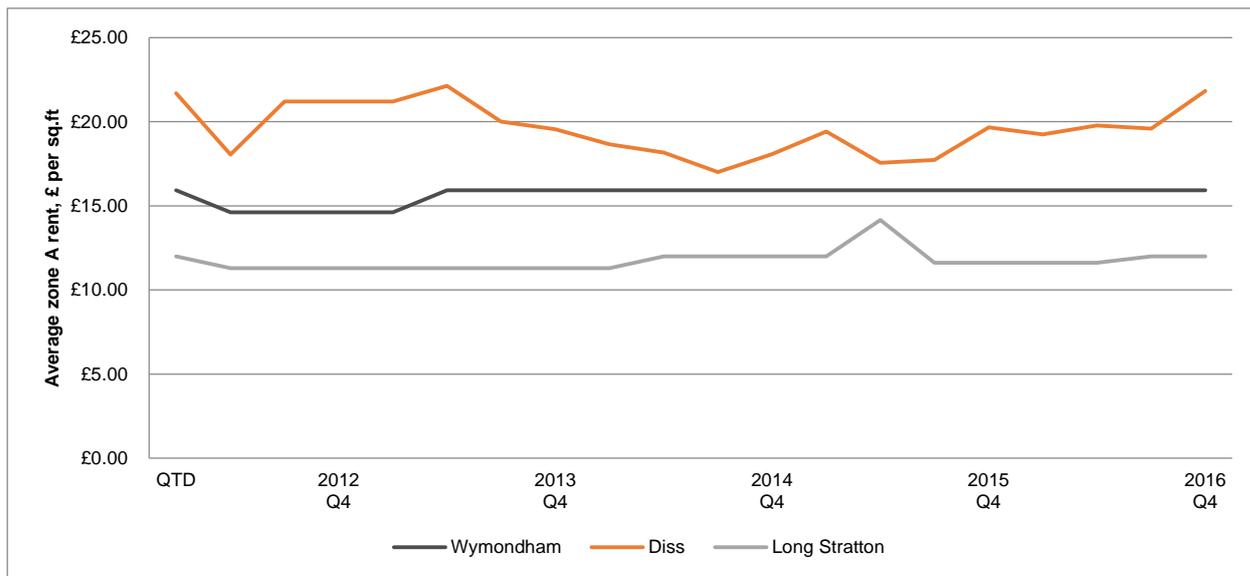
Proportions of vacant street level property (PPG Indicator B)

- 6.16 The Experian Goad Report (December 2015) identified 12 vacant units (6.8%) across Diss town centre, below the UK average of 11.2%. On undertaking our health check in February 2017, we discovered that there has been some change with regards to the composition of vacant units in Diss town centre; subsequent to the Experian survey, six new vacant units have arisen, whilst a further seven previously vacant units have now become occupied, reflecting a fairly typical level of 'churn' of units which is to be expected in any centre. This has positively seen the centre's vacant unit level fall to 11 units, and the vacancy rate therefore remains below the UK average.
- 6.17 One area of clustering of vacant units was observed at St Nicholas Street, many of which have arisen as a result of retailers reallocating to larger units within the town. The fact that retailers are seeking to 'upsized' can be seen as a positive reflection of the vitality and viability of the town centre.

Commercial yields and commercial rents (PPG Indicators C and F)

- 6.18 **Figure 6.1** (overleaf) shows the performance of prime commercial rents in Diss, along with those of Long Stratton and Wymondham, for the period 2012-16. This data was obtained from the CoStar Commercial Property Database (accessed February 2017). CoStar does not contain information on rents for the other town centres considered as part of this study (Aylsham, Harleston and Loddon).
- 6.19 Figure 6.1 shows that Diss' commercial rents have fluctuated in recent years compared to the other centres measured (Wymondham and Long Stratton). Whilst commercial rents per sq.ft in Diss peaked at £22 per sq.ft in Q2 of 2013 and fell to a low of £17 per sq.ft in Q3 of 2014, the most recent average rental figure (Q4 of 2016) was at £22 per sq.ft. Whilst the variability should be monitored by the Council, the current commercial rental rate, when aligned with the relatively low vacancy rate, would suggest that rates are broadly at an appropriate level for the centre.

Figure 6.1: Prime zone A rents for Diss, Long Stratton & Wymondham, 2012-16



Source: CoStar Commercial Property Database

Customers' views and behaviour (PPG Indicator D)

6.20 The household survey undertaken in support of this study asked respondents what they like and dislike about Diss town centre, and how they consider the centre could be improved. A full copy of the results can be found at Volume 4 of the study; we summarise the key findings below in respect of Diss below:

- Frequency of visits:** The largest proportions of the 134 respondents who say they visit Diss, do so once a week (37%), with a further 13% using it twice a week. 21% state they only visit the centre once a month.
- Main purpose of trip:** For over half of the respondents (54%), food shopping was the main reason for visiting Diss town centre. This is expected with Tesco, Morrisons and Aldi all located within the town centre, albeit outside of the primary shopping frontage. Non-food shopping accounted for 23% of trips, travelling to/from work 5% and visiting financial services such as a bank, building society or Post Office (5%).
- Linked trips:** The majority of respondents (34%) stated that they do not undertake any 'linked trips' in Diss. 25% of respondents undertake non-food shopping as a 'linked trip' and 22% undertake food shopping.
- Likes:** 22% of the respondents explained they like Diss because of its close proximity to home, 9% outlined the centre's attractive environment and a further 8% stated it was the good range of specialist/independent stores on offer. 18% of respondents expressed that they liked 'nothing or very little' about the centre.
- Areas for improvement:** The highest proportion of respondents (26%) thought that Diss town centre needed a better choice of shops, with a further 10% wanting more car parking and 5% wanting fewer charity shops.



Diss Park

Pedestrian flows (PPG Indicator G)

6.21 From our visit to the centre, we observed a good level of pedestrian footfall across the centre. Predominant users of the centre at this time were parents and school children; with the highest footfall observed to be around the Market Place. The highest proportions of vehicular traffic was located in the area of the A1066 surrounding the Aldi, Morrisons and Tesco supermarkets.

Accessibility (PPG Indicator H)

6.22 The centre includes a good level of car parking provision, including 70 spaces at Chapel Street Lower, Mere Street (43 spaces) and Weavers Court (70 spaces). Both Morrisons (540 spaces) and Tesco (390 spaces) provide free parking to its customers; these stores/car parks are located on the edge of the town centre and are easily walkable from the centre. There are a number of bus services that connect Diss and Norwich city centre with varying timings and routes. Other bus routes to and from Diss include connections to Harleston, Bury St. Edmunds and Great Yarmouth. Train services operate between Diss and Norwich at half-hourly intervals, with services also connecting Diss with London and Ipswich.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

6.23 The centre's perception of safety can generally be considered reasonable and we did not observe any obvious issues in terms of crime or anti-social behaviour at the time of our visit.

6.24 The environmental quality of the centre is on the whole quite strong. The shop fronts along Mere Street were largely in keeping with the historical aspects of the town centre. The area to the north of St Nicholas Street, namely Cobbs Yard, is an area noticeably of attractive environmental quality. With the exception of the Morrisons and Tesco stores, the majority of the centre is located in a Conservation Area. Parts of the town, including the north-western area of St Nicholas Street



Cobbs Yard, Diss

and Denmark Street were of poorer environment quality, yet it was clear efforts were being made to rectify this, with the recently completed redevelopment of the Corn Hall for example. On the whole, the general environmental quality of the centre is good, with benches around the Market Place and landscaped access to Diss Park providing amenity space for the town centre's users.

Summary of vitality and viability of Diss town centre

- Diss shows largely positive signs of vitality and viability. The centre is home to Tesco, Morrisons and Aldi supermarket, as well as a number of day to day national comparison goods multiples. The Tesco and Morrisons stores are detached from the primary shopping area but are sufficiently close to provide linked shopping trips if desired.
- There is a good range of independent retailers present within the centre, and many of these form part of the centre's primary shopping area.
- The majority of users in the centre visit the centre for food shopping, and these facilities were observed to be the busiest areas of the centre at the time of our visit.
- The Experian Goad survey identified that vacancy rates were below the UK average in December 2015 and subsequent to this, the vacancy rate in the centre has fallen slightly further.
- Diss has, for the most part, very good levels of environmental quality with areas around Diss Park and the Market Place providing local amenity space.
- Overall, we would consider Diss to benefit from generally positive levels of vitality and viability and no obvious areas of concern were noted.

Harleston health check (South Norfolk District)

6.25 Harleston is located in South Norfolk district, close to the Norfolk-Suffolk border. The town centre is located approximately 25km to the southeast of Norwich. The town centre focuses on The Thoroughfare, Broad Street and Church Street. Harleston is a small town centre, and its focus is very much orientated towards meeting local shopping needs.

Diversity of uses, retailer representation and intentions to change representation (PPG Indicators A and E)

6.26 The most recent Experian Goad survey of Harleston town centre was undertaken in October 2014. Based on this survey, the town centre consists of a total of 96 units and 12,097 sq. m of gross retail/ service floorspace. It is therefore a particularly small town centre and our findings set out in this section be considered in this context. Of these 96 units, 37.5% were comparison goods retailers, 14.6% convenience good retailers and a further 14.6% retail service operators. As identified in **Table 6.3**, representation of all of these are above the UK average. The provision of both financial and business



The Thoroughfare, Harleston.

services and leisure services are below their respective UK averages. Since the Experian Goad survey, Harleston has seen the introduction of a number of new leisure services including 'The Apiary Cake and Coffee House', 'The Apiary Delicatessen' and 'Yakety Yak Tea Room'. Although below the UK average figures, the leisure services and financial and business services units present within the town centre seemed generally busy and looked to be performing well.

Table 6.3: Composition of units in Harleston town centre

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	36	37.5	31.7	+5.8
Convenience	14	14.6	8.7	+5.9
Retail Service	14	14.6	14.1	+0.5
Leisure Services	16	16.7	23.5	-6.8
Financial & Business Services	7	7.3	10.5	-3.2
Vacant	9	9.4	11.2	-1.8
Total	96	100	100	-

Source: Experian Goad Category Report (October 2014)

6.27 Harleston has a retail provision consisting of both national and independent retailers. There are two small Co-operative supermarkets and a larger Budgens store. The Budgens supermarket is located centrally and provides approximately 150 free car parking spaces for use with both the store and town centre. The store itself seemed to be relatively busy and appears to be performing generally well. Aside from other national retailers, including Boots, Barclays Bank and the Post Office most units in Harleston are occupied by independent retailers, which includes a variety of clothes shops and homeware stores.

6.28 The CoStar Commercial Property Database identifies two requirements for national operator representation in Harleston, from supermarket operator Aldi (seeking sites between 4,500 and 19,000 sq.ft), and fashion retailer Select, who are seeking units of between 3,000 and 5,000 sq.ft. In common with the other Main Towns, we would expect the majority of demand for premises to come from the independent sector, rather than national retailers.

Proportions of vacant street level property (PPG Indicator B)

6.29 The Experian Goad survey identified nine vacant units in Harleston, equivalent to 9.4% of units in the centre. This is below the UK average of 11.2%. From our health check survey undertaken in February 2017, the number of vacant units remains at nine, and therefore below the UK average, although there has been some changes in the composition of units in the centre.

Commercial yields and commercial rents (PPG Indicators C and F)

6.30 The data available for Harleston on CoStar's Commercial Property Database is very limited, with no time-series data available to explore year-on-year trends. Average prime commercial rents in Harleston were at £13 per sq.ft in 2016.

Customers' views and behaviour (PPG Indicator D)

6.31 The household telephone survey identified the following patterns of usage for those respondents that stated they visit Harleston.

- **Frequency of visits:** 25% of the respondents stated they use Harleston town centre on a daily basis. This is a higher percentage than any of the other town centres in the survey and confirms the extent to which Harleston performs a role orientated towards meeting local shopping needs. In total, 84 of the 103 respondents (82%) used the centre at least once a week, with the large majority using it more often than this.

- **Main purpose of trip:** Similar to trends seen in the other Main Towns, the main purpose for the majority of respondents' visits to Harleston is for food shopping (44%). 25% stated that it was for non-food shopping, with a further 8% stating it was to visit a financial service such a bank, building society or Post Office.
- **Linked trips:** In Harleston only 23% of respondents do not undertake 'linked trips', with 40% undertaking non-food shopping as a 'linked trip' and 25% undertaking food shopping as a 'linked trip'. This suggests there is a good balance of retail uses in the centre given its limited size.
- **Likes:** The centre has a number of aspects which respondents stated that they like. 26% identified it because the centre was close to home; 26% liked the good range of non-food shops; 25% the attractive environment; and 21% the good range of specialist/independent stores.
- **Areas for improvement:** Approximately half of the respondents stated that there was no need to improve the centre, which suggests a high level of satisfaction with the centre. A small number of respondents felt that Harleston town centre could be improved by having a better choice of shops (8%), and more/better seating and toilets (7%).

Pedestrian flows (PPG Indicator G)

6.32 As with the other centres, we are not aware of any formal pedestrian flow counts which have been undertaken in the centre. It was observed from our visit that the centre had a good footfall for both the time of day and day of the week. Shoppers were noted to park on the Budgens car park set back from the primary frontage, and then walk into the town centre via The Thoroughfare. Pedestrian levels were good across the centre, but appeared strongest along The Thoroughfare and around the Market Place



Market Place, Harleston

6.33 Whilst vehicle numbers were significant in the centre, this was largely down to an emergency diversion on the day of the health check survey. Whilst we are not able to draw conclusions on 'typical' levels of traffic flow, we note that no issues of traffic congestion were identified as a concern in the household survey.

Accessibility (PPG Indicator H)

6.34 Parking in Harleston is free and is focused around Broad Street (59 Spaces) and the Budgens store at Bullock Fair Close (137 Spaces). Additional parking is located on Market Place. Harleston is linked to Norwich via two bus services, the number 83 and 84, which run every two to three hours, a fairly infrequent level of public transport connectivity. Additionally, there is an hourly bus service to Diss (route 80); however there is no service later than 1815. There is also no railway station serving the town. The centre does not, therefore, benefit from particularly strong accessibility by public transport.

Perception of safety and state of town centre environmental quality (PPG

Indicators I & J)

6.35 Generally, Harleston is a well-maintained centre benefiting from a positive environmental quality. The shopfronts are largely consistent with one another and are in keeping with the town centre's historic feel. Decorative flags are situated above the shop signage on The Thoroughfare, giving the town a pleasant village/community feel, further encouraged by the compact nature of the centre. There is limited provision of pedestrian seating and there is scope for this to be improved upon. Whilst functional, some



Bullock Fair Close, Harleston

of the seating is located in sporadic locations, which are unlikely to attract visitors to stop and use the facility.

Summary of vitality and viability of Harleston town centre

- Harleston's vitality and viability is mainly positive, with the centre anchored around the centrally-located Budgens store and its car park. It serves a role and function of meeting day to day local shopping and services needs and the household survey identifies that the centre benefits from high levels of daily/multiple shopping trips per week from local residents. The majority of the offer in the centre comprises of independent operators, with the exception of national food retailers and financial and business services. The centre is small and compact, extending to just under 100 units in total.
- Nearly half of the visitors to Harleston do so for food shopping, and in common with the other Main Towns it is apparent that the wider vitality and viability of the centre is supported by the presence of foodstores.
- Components of the environmental quality are positive, with attractive shop frontage and decorative flags conveying a village-like feel. However the public seating is poorly placed and underused, and there is scope for improvement of the public realm in this respect.
- The vacancy rate is below the UK average, and no major concentration of vacant units were observed.
- The centre has limited accessibility by public transport although we consider car parking provision in the centre to be adequate.

Wymondham health check (South Norfolk District)



Market Place, Wymondham

6.36 Wymondham is a market town, situated in South Norfolk, approximately 14km to the southwest of Norwich. The centre is of a similar size (in terms of number of units) to Aylsham and Harleston, although has a considerably larger residential population. The centre is again focussed around a Market Place/Square that is seen across all the centres considered in this chapter. The town centre is historic in nature, with a number of buildings in the centre dating from the mid-

17th century, and has not been subject to any significant expansion of its retail offer. This affords the centre an attractive, historic environment with a number of medieval streets.

6.37 The focus of commercial activity in the centre is around Market Street and Fairland Street. Where the two roads merge, Wymondham's Market Place is located, alongside the historic Market Cross. As with the other Main Towns, the focus of the retail/services offer in the centre is orientated towards meeting day-to-day shopping and service needs. There are a number of antique shops in the centre, which contributes to the diversity of uses and helps provide a unique selling point to the centre.

6.38 A new Morrisons store opened in Wymondham in 2013; this store is not within the defined shopping frontages in Wymondham town centre but is within approximately ten minutes' walking distance of the centre. Elsewhere in Wymondham, there is an out-of-centre Waitrose store, located on the eastern edge of the Wymondham urban area on Norwich Road, and the findings of the household survey (discussed later in this report) confirm that these two stores dominate food shopping trips in the town and surrounding area. A planning application for the conversion of a former Focus DIY store on nearby Farrier Close (currently trading as Poundstretcher) for occupation by Lidl was granted planning permission by South Norfolk Council in February 2017.

Diversity of uses, retailer representation and intentions to change representation (PPG Indicators A and E)

6.39 An Experian Goad survey of Wymondham town centre was undertaken in July 2016, of with the composition of uses displayed in **Table 6.4**. The town centre comprises of a total of 135 retail/service units, amassing to a total gross retail/service floorspace of 18,229 sq. m. Of these 135 units, 29.6% are occupied by comparison good retailers, 8.9% by convenience retailers, 15.6% by retail service operators and a combined 39.3% provision of leisure and financial and business services. The percentage of comparison units falls slightly below the UK average; other uses are above their respective national averages.

Table 6.4: Composition of units in Wymondham town centre

	No. of units	% of Total	UK Average (%)	Variance (%)
Comparison	40	29.6	31.7	-2.1
Convenience	12	8.9	8.7	+0.2
Retail Service	21	15.6	14.1	+1.5
Leisure Services	32	23.7	23.5	+0.2
Financial & Business Services	21	15.6	10.5	+5.1
Vacant	9	6.7	11.2	-4.5
Total	135	100	100	-

Source: Experian Goad Category Report (July 2016)

- 6.40 Retail provision within the centre comprises both national retailers and independent stores. The centre has a small Co-Op foodstore on Market Place, which due to its size only is capable of meeting 'top-up' food shopping trips. The town's larger supermarkets (Morrisons and Waitrose) are located out of the centre and cater for main / bulk food shopping trips. Morrisons is located approximately ten minutes' walk away from the town centre. Examples of other national retailers/service operators present in the town centre include Savers, Post Office and several banks. There is also a small branch of Jarrold's Department Store, located at the northern end of the centre on Middleton Street. As noted above, the centre also contains a number of specialist comparison goods retailers such as antiques shops and gift shops which aid with its diversity.
- 6.41 As has been seen for the other Main Towns, demand for representation from national retailers in Wymondham is limited; this is largely to be expected in the context of current retail trends and Wymondham's proximity to Norwich. Nevertheless the CoStar Commercial Property Database identifies that there is demand for representation in Wymondham from supermarket retailer Aldi, who are seeking a site for a store of between 4,500 and 19,000 sq.ft, as well as Costa, Domino's Pizza, and pub chain Marston's. The Poundstretcher unit on the northern edge of Wymondham, at Farrier Close, has been the subject of a Section 73 application to facilitate reoccupation of the unit by supermarket operator Lidl. As stated for the other Main Towns, we expect demand for premises in Wymondham town centre is likely to be stronger from the independent sector.

Proportions of vacant street level property (PPG Indicator B)

- 6.42 At the time of the Experian Goad survey (July 2016), the number of vacant units in Wymondham was nine (6.7%), below the UK average of 11.2%. Subsequently the vacancy rate had decreased further. Whilst one unit became vacant over the period between the Experian Goad survey and our own visit to the centre; a further three vacant units have now been filled. There were no significant signs of clustering of vacant units. The vacancy rate is therefore below the UK average and this can be considered a positive reflection on the wider vitality and viability of the centre.

Commercial yields and commercial rents (PPG Indicators C and F)

- 6.43 **Figure 6.1** shows the performance of commercial rents in Wymondham from the CoStar Commercial Property Database between 2012-16. The average commercial rent in Wymondham has been at £16 per sq.ft for the past four years; this consistency suggests that demand for premises has remained relatively stable, and given the low vacancy rate it appears this retail level is appropriate for the centre.

Customers' views and behaviour (PPG Indicator D)

- 6.44 The key findings from the household telephone survey in respect of those survey respondents who use Wymondham town centre were as follows:

- **Frequency of visits:** Wymondham follows a similar trend to Diss with regards to the regularity of respondent visits. Of the 125 respondents 22% stated identified they visited the town centre once a week, with a further 22% explaining that they visited less often than once a month. Only 35% of respondents stated that they used the centre once a week or more. The most likely reason for these figures is that the centre does not have a medium-large scale supermarket located within the town centre. Therefore, unlike the other competing centres, there are fewer respondents visiting the centres for this purpose.
- **Main purpose of trip:** Only 21% of respondents identified food shopping as their main purpose for visiting the centre, again reflecting the lack of a larger supermarket in town centre. The other main purposes respondents visited Wymondham were for visiting financial services such as a bank, building society or Post Office (20%), non-food shopping (18%) and visiting family/friends (16%).
- **Linked trips:** In Wymondham 35% of respondents do not undertake 'linked trips'. 29% undertake non-food shopping as a 'linked trip', 20% food shopping and 16% visiting a financial service such as a bank, building society or Post Office. This suggests that relatively few users of the centre are undertaking linked trips with the new Morrisons store, despite its relatively close proximity to the town centre.
- **Likes:** 25% of respondents expressed that it was the centres close proximity to home that they liked most about Wymondham. A further 19% of respondents claimed it was the centre's attractive environment and 15% its historic environment, suggesting that the environmental quality of the centre is an important asset.
- **Areas for improvement:** Positively, almost half (47%) of the respondents expressed that nothing within the centre needed to improve. Those that did seek improvements identified it was more car parking (9%), a better choice of shops (8%) and better quality shops (7%) needed, however there are relatively low proportions of respondents.

Pedestrian flows (PPG Indicator G)

- 6.45 From our observations, pedestrian flow was good within the town centre, especially around the Market Place and along Market Street. Because of the time of day, many shoppers were using the centre as a place to buy lunch. Vehicle traffic was at a steady level and was not resulting in any negative impacts on the pedestrian flow of the centre.

Accessibility (PPG Indicator H)

- 6.46 There are several car parks in and within close proximity to the town centre, with Central Hall car park offering 143 spaces, Market Street 70 spaces and Back Lane 70 spaces. Parking prices range between £1-1.50 per hour. There are also a limited number of free short-stay parking spaces on Fairland Street and Middleton Street. Public transport services in Wymondham are good with a number of bus services to Norwich and more local destinations such as Lingwood and Wroxham. A direct train service goes from Wymondham train station (located on the edge of the town centre) to Norwich city centre every hour with a journey time of approximately 15 minutes.

Perception of safety and state of town centre environmental quality (PPG Indicators I & J)

- 6.47 Wymondham is a well-maintained centre that has very few signs of littering. There was also no sign of crime or antisocial behaviour. There is also a good amount of bedded plants and public seating available, especially around the Market Place. The centre is steeped in history and retains its



Market Street, Wymondham

medieval street pattern and a large number of historic buildings.

6.48 Whilst the majority of shopfronts across the centre were in keeping with the town's heritage feel, some, such as the Coral unit, appear overpowering within their surroundings. This may be a point that the Council wishes to review, ensuring that Wymondham's shopfronts become more uniform/ in keeping with the centre's heritage. This matter aside, we consider the environmental quality of Wymondham to be strong, and its historic nature makes an important contribution to its overall vitality and viability, with its narrow streets and historic buildings lending the town centre a strong sense of place and character.

Summary of vitality and viability of Wymondham town centre

- Wymondham has good signs of vitality and viability. The Co-Op store in the town is small-scale and meets day-to-day/top up shopping needs. The large majority of the retail offer in the town centre consists of independent operators, which were observed to have a good level of footfall. Some of the retail offer is more specialist in nature, such as presence of a number of antique shops, which adds to the diversity of the offer. The presence of a small branch of Jarrolds Department Store is a positive addition to the town.
- Vacancy rates in the period between the Experian Goad survey (July 2016) and our health check (February 2017) have decreased and there was no evidence of clustering of vacant units.
- The environmental quality in Wymondham is generally positive and indeed makes an important contribution to the overall vitality and viability of the centre. The historic nature of the centre is an important asset which evidently should be protected and enhanced.
- A number of the shopfronts in the centre would benefit from their appearance being toned down to better reflect the historic character of the centre.

Loddon village centre (South Norfolk District)

6.49 Loddon is a small centre — classified as a 'large village' — located within the South Norfolk District. The centre lies within the Norfolk Broads boundary and is approximately 16km to the south west of Norwich city centre. The A146 travels around the edge of the town and is a main arterial road into the city, with regular bus services providing public transport facilities between the two centres. The town centre's active frontage is focused along Bridge Street before merging into High Street. Here the Church Plain/ Market Place is present and is predominantly used for free car parking and the imposing Holy Trinity Church.

6.50 The centre's retail/service offer is focused around serving local need. The market place is home to a Co-operative supermarket. The store, whilst relatively small, had a wide selection of goods including hot food and fresh groceries. For the time of day, the store was relatively busy and was serving a prominent 'top-up' facility for locals. Other convenience units with the town included a Premier newsagents, a bakery and a butchers.

6.51 Other national operators are limited to a Barclays Bank with an ATM facility. All the remaining units are independent and the mix of uses is relatively broad for the size of the centre. These were well maintained with tidy facades and advertisement that was consistent and in keeping with the village-like feel of the town. There were no obviously



vacant units, suggesting that demand is sufficient to maintain their viability and vitality.

- 6.52 Overall, although Loddon village centre is fairly small scale regarding both size and provision of retail units and services, it is clearly meeting its role and function as a local shopping and : *Loddon*

Long Stratton village centre (South Norfolk District)

- 6.53 Home to South Norfolk Council's main offices, Long Stratton is a predominantly linear centre is located on the A140 and is 15km north east of Diss and 16km south of Norwich city centre. Due to its location on this main arterial route, Long Stratton has multiple bus services connecting it to Norwich.

- 6.54 Although the centre's locality to the A140 has its benefits, such as good transport links and attraction of passing trade, it does also present the centre's greatest constraint. The active frontage that is located directly on the A140, although positively maintained, is stretched along the road and means the centre feels disconnected. All of the vacant units within the centre are located along the main road. Barclays have vacated their unit in the centre, leaving the centre with no bank provision.



Long Stratton

- 6.55 There are two further concentrations of retail and commercial activity in the centre, both located just off the A140. The first of these is on Swan Lane, where a Co-operative food store and the South Norfolk Shopping Centre are located. The Co-operative food unit is a fairly large store which shares its floorspace with Subway and for the time day was very busy at the time of our visit. Due to the stores' size and location it provides both as a 'top-up' facility and a place to undertake a larger shop. The South Norfolk Shopping Centre is located on the opposite side of Swan Lane and provides a parade of retail units. These include a Post Office, discount store, butchers, charity shop and fish and chip shop. Again this facility seemed to be generally busy.
- 6.56 The second area of retail/commercial activity is located off Flowerpot Lane and consists of another parade of shops called the Ice House Shopping Precinct. Although the units here did not seem to be as busy as those in the South Norfolk Shopping Centre, these largely consisted of more specialist financial and business services and residential flats above.
- 6.57 Overall Long Stratton town centre seems to be performing generally well. The presence of the A140 running through the centre is an obvious constraint to the environmental quality of the centre, but conversely is likely to generate footfall for businesses from both passing trade and local residents, on account of its early accessibility. As identified the active frontage that is located directly on the A140 suffers because of how busy the road is. Other areas of the centre are performing positively, namely the Co-operative food store and South Norfolk Shopping Centre.

7. Introduction to quantitative needs assessment

7.1 In this section, we introduce the key inputs which form the basis of our assessment of the 'need' for new comparison and convenience goods retail floorspace for Greater Norwich over the study period to 2037. The calculation of 'need' is a technical exercise which is derived from considering three key factors: where residents of the 'survey area' are currently undertaking their shopping; how much population growth is expected to come forward in the survey area; and how much spending on convenience and comparison goods will increase, having regard to economic forecasts and other factors such as online shopping. We introduce these inputs below, and the findings are subsequently set out in **Section 8**.

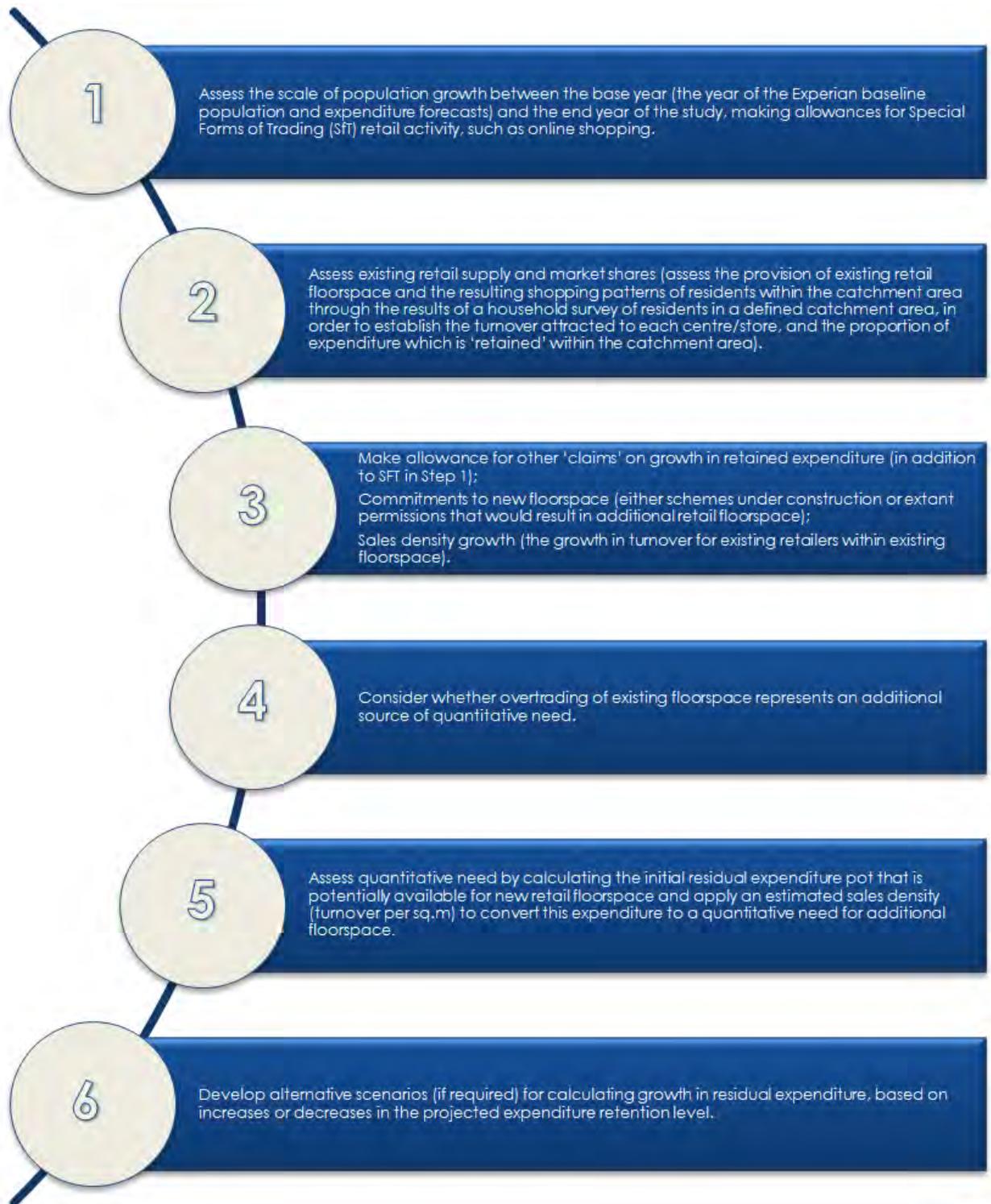
7.2 The findings of this section should be read in association with the capacity tabulations at Appendix I (for comparison goods) and Appendix II (for convenience goods) in Volume 2.

Calculation of quantitative 'need'

7.3 The 'need' for new floorspace is calculated through a conventional and widely-accepted step-by-step methodology, consistent with best practice, which draws upon the findings of the household telephone survey of shopping patterns which has been undertaken in support of this study (as previously discussed) to model the current flows of expenditure (i.e. spending in £m) to each retail destination within the survey area, and those competing centres in the surrounding area. The process for calculating quantitative 'need' is essentially unchanged from that in the councils' previous evidence base study. The stages of the quantitative need assessment are shown diagrammatically in **Figure 7.1**, overleaf.

7.4 The survey area which we have used as the basis of our assessment is shown in **Figure 7.2**. As can be seen, the survey area extends across a wide area of Norfolk, and also extends into parts of Suffolk, well beyond the administrative areas of Norwich City, Broadland and South Norfolk. The wide extent of the survey area is designed to reflect the regional-scale shopping and cultural offer of Norwich city centre which, as the sole highest order centre in a predominantly rural catchment area, can be expected to have an extensive geographical influence over residents' patterns of shopping and leisure visits.

Figure 7.1: Stages of a quantitative need assessment



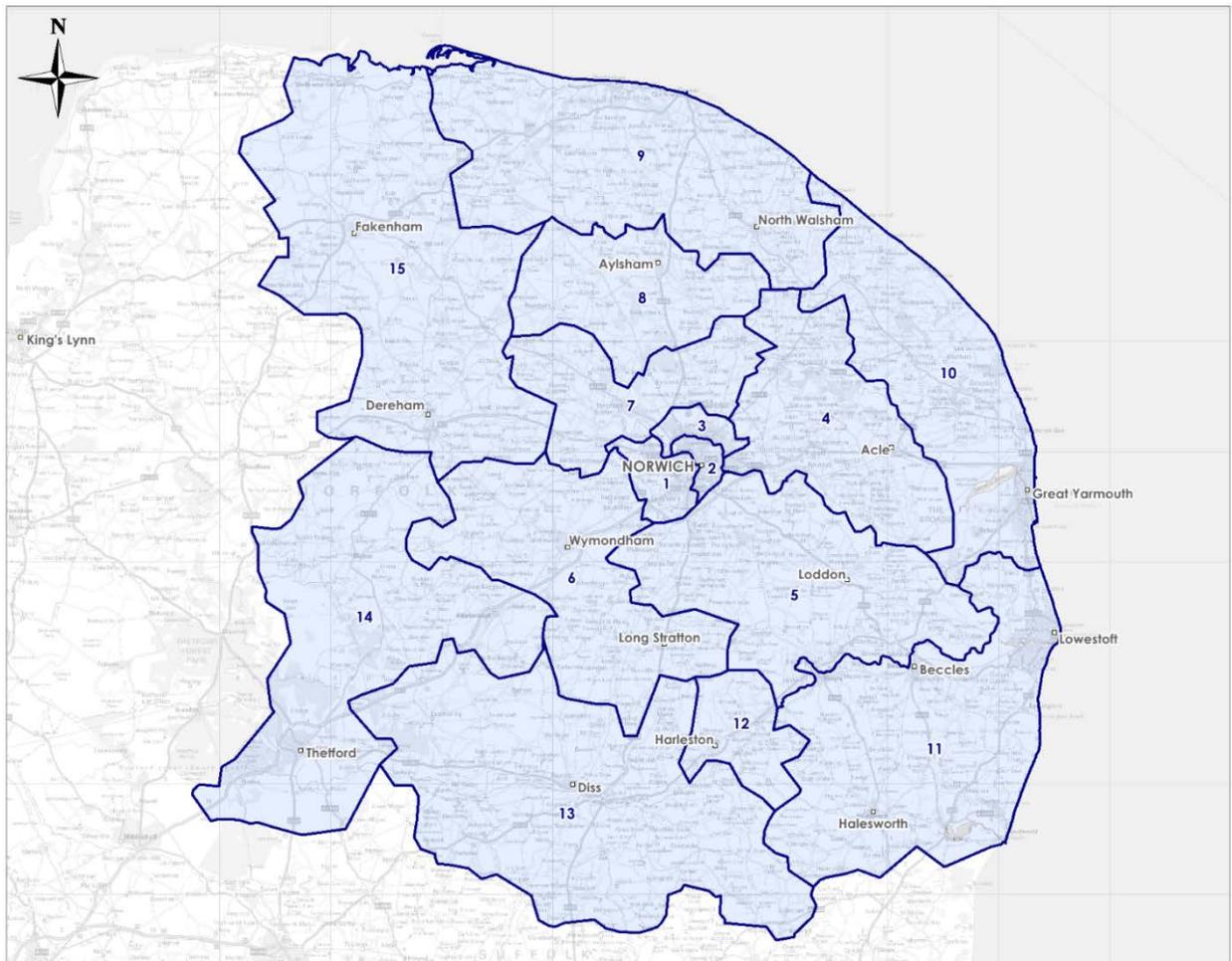
7.5 The survey area is sub-divided into 15 survey zones, as follows:

- **Zone 1** covers south/west Norwich;
- **Zone 2** covers Norwich city centre and the Riverside area;
- **Zone 3** covers north Norwich;
- **Zone 4** covers the Norfolk Broads and Acle;
- **Zone 5** covers Loddon and its surrounding rural area;

- **Zone 6** covers Wymondham and Long Stratton;
- **Zone 7** covers the rural area north of Norwich, including settlements such as Taverham and Spixworth;
- **Zone 8** covers Aylsham and its surrounding rural area;
- **Zone 9** covers North Walsham and Cromer;
- **Zone 10** covers Caistor-on-Sea and Great Yarmouth;
- **Zone 11** covers Lowestoft, Halesworth and Beccles;
- **Zone 12** covers Harleston;
- **Zone 13** covers Diss and its surrounding rural area;
- **Zone 14** covers Thetford and Attleborough; and
- **Zone 15** covers Dereham, Fakenham and Wells-next-to-the-Sea

7.6 The overall boundary of the study area is unchanged from the 2007 Study. However, we have, in agreement with the project team, reduced the number of survey zones from 30 to 15, by amalgamating a number of rural zones and zones covering those parts of the survey area which fall outside the three authority areas. The number of zones covering the Norwich urban area has been reduced from seven to three.

Figure 7.2: Survey area



7.7 As mentioned above, In support of this study, a total of 1,500 household telephone surveys were undertaken by NEMS Market Research, and a full set of survey results is provided at Volume 4 to this Study. 100 surveys were undertaken in each of the zones shown in Figure 7.2. The surveys enable an understanding of where residents in each zone are

undertaking their convenience and comparison goods shopping trips — the outputs of this directly feed into the subsequent quantitative need assessment. The approach to undertaking the survey work is discussed further below.

Estimates of population in the survey area

7.8 For the purposes of our quantitative needs assessment, we have utilised population forecasts bespoke to each survey zone which have been provided by Experian. These are past-trends based population forecasts, informed by Office of National Statistics Sub-National Population Projections. Table 1 of Appendix I shows the current and projected populations for each of the survey zones at the base year of the study (2017) and the projections at five-year interval periods throughout.

- The current (2017) population of the survey area is 874,497 persons
- The estimated population of the survey area in 2022 is 903,237 persons;
- The estimated population of the survey area in 2027 is 931,164 persons;
- The estimated population of the survey area in 2032 is 956,024 persons;
- The estimated population of the survey area in 2037 is 978,574 persons
- The total estimated growth in population between 2017 and 2037 is 104,027 persons.

Available expenditure in the survey area

7.9 Experian identify a 'per capita' spend on comparison and convenience on a zone-by-zone basis; these are shown in Table 2 of Appendix I (for comparison goods) and Table 2 of Appendix II (for convenience goods). These tables show that:

- Comparison goods spend per head varies considerably across the survey area, ranging from £3,010 (zone 2, Norwich city centre) to £4,369 in zone 5 (Loddon). The average comparison goods spend per head is £3,735.
- Convenience goods spend per head ranges from £1,913 (zone 2) to £2,279 (zone 5). The average convenience goods spend per head is £2,134.

7.10 Based on guidance provided by Experian (Retail Planner Briefing Note 14, November 2016) it is expected that spend per head on comparison and convenience goods will increase annually over the course of the GNLP period. Therefore, we apply an annual growth rate to the 2016 'baseline' figures (as summarised above) which reflect the latest Experian guidance. Details of the growth rates we have used can be found in the footnotes to Table 2 of Appendix I and II. The majority of the growth which is expected to come forward is in comparison goods spending; expenditure growth in the convenience goods sector is considerably more limited.

7.11 The figures set out in Table 2 of Appendix I and II have been discounted to include allowance for 'special forms of trading' (SFT), which are chiefly accounted for by online shopping, but also include other non-store based transactions such as catalogue shopping:

- Experian forecast that SFT currently (2017) accounts for 13.8% of total comparison goods spending, and that this will increase to 15.8% of total comparison goods spend by 2022, 16.1% by 2027, 16.4% by 2032 and 16.5% by 2037.
- Experian forecast that SFT currently (2017) accounts for 3.2% of total convenience goods spending, and that this will increase to 4.1% of total convenience goods spend by 2022, 4.7% by 2027, 5.1% by 2032 and 5.3% by 2037.

- 7.12 Table 2 of Appendix I and II summarises the 'with' and 'without' SFT per capita expenditure figures, and also shows the deductions we have made for SFT at each of the five-year interval periods through to 2036.
- 7.13 By applying the population forecasts to the per capita expenditure forecasts, we can gain an understanding of the total amount of comparison and convenience goods spending which is available to residents of the survey area, and how much this is expected to increase over the duration of the study period to 2036, using growth rates provided by Experian (Experian Retail Planner 14, November 2016). This exercise is set out in Table 3 of Appendix I (for comparison goods) and Appendix II (for convenience goods) and shows that:
- There is currently £2,751.1m of comparison goods expenditure available to residents of the survey area. This is expected to increase to £3,086.9m of comparison goods expenditure by 2022; £3,706.6m by 2027; £4,440.0m by 2032 and £5,314.2m by 2037. This is a growth in comparison goods expenditure of £2,563.1m.
 - There is currently £1,782.9m of convenience goods expenditure available to residents of the survey area. This is expected to increase to £1,804.7m by 2022; £1,854.7m by 2027; £1,905.9m by 2032 and £2,065.9m by 2037, equivalent to a growth in convenience goods expenditure of £283.0m. The growth in convenience goods expenditure (£283.0m) is therefore considerably more modest, at almost one-tenth of that of comparison goods expenditure growth.

Shopping patterns in the survey area

- 7.14 The household telephone survey results identify shopping habits of households for both convenience and comparison goods, as well as commercial leisure spending. For convenience goods, the household telephone survey included questions on 'main food' and 'top-up food' shopping. The results of the two types of food expenditure were then merged through the application of a weight which reflects the estimated proportion of expenditure accounted for by each goods type (70% 'main' food / 30% 'top-up' food¹⁴). This forms a 'composite' pattern of convenience spending, expressed as a market share for each destination centre or foodstore for each survey zone.
- 7.15 For comparison goods, the household telephone survey included questions on where respondents normally undertake shopping for the following types of comparison goods shopping:
- Clothing and footwear;
 - Furniture, floor coverings and household textiles;
 - DIY and decorating goods;
 - Domestic appliances;
 - Audio-visual equipment;
 - Personal and medical goods; and
 - Recreational and luxury goods.
- 7.16 Shopping patterns for each of these types of comparison goods are then combined to produce a 'composite' set of comparison goods shopping patterns, using weighted averages of the household survey responses for each goods type base on the proportion of personal spending ('expenditure per capita') available to residents in the survey area, as provided by Experian.

Comparison good shopping patterns

- 7.17 Shopping patterns derived from the household telephone survey allow us to calculate the amount of comparison goods expenditure spent in each centre within and surrounding the survey area which forms the basis of our

¹⁴ Based on our experience elsewhere, this represents a suitable split between 'main' and 'top up' food shopping.

assessment. This indicator is a good reflection of both the strength of the retail offer in a centre, as well as its accessibility, and overall quality of experience.

- 7.18 The total amount of expenditure which is retained within the survey area is known as its 'retention rate'; the remaining expenditure which flows to destinations outside the study area is known as 'leakage'. **Table 7.1** shows the amount of comparison goods expenditure retained within the survey area and the amount of expenditure 'leakage'.

Table 7.1: Comparison goods expenditure retention in survey area

	£m	% of total
Total amount of comparison goods spend available to study area (2017), of which:	2,751.1	100.0%
— Comparison goods trade draw to centres in Greater Norwich, e.g. Norwich City Centre, district centres, retail parks & Main Towns	1,707.6	62.1%
— Comparison goods trade draw to competing destinations, e.g. Lowestoft, Great Yarmouth, Dereham, Beccles, Thetford, Fakenham	842.0	30.6%
— Comparison goods spending in other destinations	201.5	7.3%

Source: Table 5, Appendix I

- 7.19 Our assessment has identified that there is a total of £2,751.1m of comparison goods expenditure which is available to residents in the survey area. Of this, £1,707.6m is retained by centres and stores in Greater Norwich (including stores in Norwich city centre, district centres in Norwich, retail parks, plus comparison goods spend in the Main Towns). This is equivalent to a 'retention rate' of 62.1%. It is apparent that the overall comparison goods retention rate has increased since the 2007 Study — which identified that 52.3% of available comparison goods expenditure was retained in the survey area, the boundaries of which have remained unchanged. This indicates that centres in the survey area have increased the proportion of comparison goods spend which they attract from local residents, meaning there is less expenditure 'leakage' to competing centres. This therefore suggests that more sustainable patterns of comparison goods shopping are now taking place across the survey area.
- 7.20 **Table 7.2** summarises the most popular destinations for comparison goods shopping for residents in the survey area, identifying the extent to which locations outside the Greater Norwich compete for spending with the network of centres and other retail destinations in the Greater Norwich area. The locations which fall within the Greater Norwich area are shown highlighted in bold.

Table 7.2: Comparison goods turnover of centres within and surrounding survey area

Centre	LPA	Comparison goods trade draw (£m)	% of total comparison goods expenditure available to survey area
Norwich city centre	Norwich City	1,263.5	45.9
Lowestoft	Waveney	155.6	5.7
Great Yarmouth	Great Yarmouth	152.0	5.5
Dereham	Breckland	78.3	2.8
Diss	South Norfolk	78.1	2.8
Beccles	Waveney	76.4	2.8
Sweet Briar Retail Park, Norwich	Norwich City	56.1	2.0
Thetford	Breckland	49.0	1.8
Sprowston Retail Park, Norwich	Broadland	47.5	1.7
Fakenham	North Norfolk	45.2	1.6
Hall Road Retail Park, Norwich	Norwich City	39.0	1.4
Riverside district centre, Norwich	Norwich City	38.0	1.4
B&Q, Norwich (Boundary Road)	Broadland	37.4	1.4
Longwater Retail Park, Norwich	South Norfolk	37.1	1.4
Bury St Edmunds	St. Edmundsbury	36.9	1.3
Wymondham	South Norfolk	31.3	1.1

Source: Table 5, Appendix II. All comparison goods destinations accounting for over 1% of survey area turnover shown

- 7.21 Table 7.2 shows that, as would be expected, Norwich city centre is the most popular destination for comparison goods shopping for residents in the survey area, drawing £1,236.5m of comparison goods spend from the survey area, equivalent to 45.9% of total comparison goods spending. In other words, Norwich city centre accounts for almost £1 in every £2 spent on comparison goods in the survey area. This demonstrates both the strength of its comparison goods offer and the influence it has over shopping patterns across the area as the sole highest-order centre. The second and third most popular comparison goods shopping destinations — Lowestoft and Greater Yarmouth — have a comparison goods turnover of £155.6m and £152.0m respectively, substantially lower than that of Norwich city centre.
- 7.22 The dominant position which Norwich city centre enjoys over residents' comparison goods shopping patterns confirms that Norwich city centre is currently fulfilling its role and function as a regional shopping destination. Positively, Table 7.2 also shows that the network of retail parks in the city are not significantly challenging the city centre as alternative shopping destinations — though this is likely to be as a consequence of many operating with controls over the range of goods which are sold, an approach which should be carried forward into the Council's new Plan.
- 7.23 Aside from Norwich city centre, the only other defined centres in the Greater Norwich area which draw over 1% of available comparison goods spend are Diss (comparison goods turnover of £78.1m, the fifth highest-ranking centre in terms of comparison goods spend), Riverside large district centre in Norwich (comparison goods turnover £38.0m) and Wymondham (comparison goods turnover £31.3m). The other Main Towns have a more limited role and function as comparison goods shopping destinations — Table 5 of Appendix I shows that, for example, Aylsham town centre has a comparison goods turnover of £11.1m, and Harleston has a comparison goods turnover of £15.0m.

Convenience goods shopping patterns

- 7.24 Convenience goods shopping is a more localised shopping activity, and residents are typically less willing to travel as far to undertake food shopping. Reflecting the changes seen in the sector in recent years, with customers preferring to undertake smaller shopping trips at more frequent intervals (see Section 3), it is particularly important for shopping needs to be met at the local level, to ensure sustainable patterns of shopping can take place.
- 7.25 There is a network of foodstores serving the Greater Norwich area — the Norwich urban area is served a large number of foodstores, with a number of new openings and store extensions having taken place since the 2007. The Main Towns are all served by their own foodstores, with most centres having at least one supermarket capable of meeting main/bulk food shopping needs. Some of these centres have also benefited from additional provision since the 2007 Study, for example the opening of a new Morrisons supermarket on the edge of Wymondham town centre.
- 7.26 Our assessment has identified that there is £1,782.9m of convenience goods expenditure available to residents of the survey area. Table 5 of Appendix II show that, of this, £716.8m is retained by main foodstores in Greater Norwich, equivalent to a retention rate of 40.2%. The remaining convenience goods expenditure is spent at other locations which fall within the survey area but outside the Greater Norwich (such as foodstores in Great Yarmouth, Lowestoft, Thetford etc), as well as in small/local shops across the survey area (see Table 7.3).

Table 7.3: Convenience goods expenditure retention in survey area

	£m	% of total
Total amount of convenience goods spend available to study area (2017), of which:	1,782.9	100.0%
— Convenience goods trade draw to main stores in Greater Norwich (Norwich City / South Norfolk / Broadland centres)	716.8	40.2%
— Convenience goods trade draw to other locations in survey area (e.g. Great Yarmouth, Lowestoft, Thetford, Beccles, Dereham)	709.3	39.8%
— Convenience goods trade draw to small/local shops in survey area	300.9	16.9%
— Convenience goods trade draw to locations outside survey area	55.9	3.1%

Source: Table 5, Appendix II

- 7.27 The most popular foodstores in the area, in terms of the turnover they attract from the survey area, are shown in Table 7.4. A total of eight supermarkets across the Norwich urban area attract a convenience goods turnover in excess of £30.0m and represent the main locations for convenience goods shopping in the urban area. Two foodstores — Tesco Extra at Sprowston and Sainsbury's at Costessey — attract convenience goods turnovers in excess of £50.0m. There is a further network of foodstores which attract a convenience goods turnover of between £10m and £30m which also play a significant role in meeting the shopping needs of residents in Norwich (these include Aldi stores at Larkman Lane, Sprowston Road and Plumstead Road, Sainsbury's at Thorpe St Andrew, and Morrisons at Old Catton).
- 7.28 Elsewhere in Greater Norwich, the only large-format supermarkets are located in Diss and Wymondham in South Norfolk, and Aylsham in Broadland. Diss has three supermarkets — Morrisons, Tesco and Aldi — with the Morrisons store being the most popular of the three. The new Morrisons in Wymondham is now the most popular supermarket serving the town. Supporting this is a network of smaller-format foodstores which, whilst not attracting the same levels of

convenience goods turnover as those stores listed in Table 7.4, nevertheless provide an important role in meeting residents' day to day shopping needs. A full schedule of these is provided at Tables 4 and 5 of Appendix II.

Table 7.4: Turnover of main foodstores in Greater Norwich

Store	LPA	Convenience goods turnover £m 2017	Sequential location
Norwich urban area foodstores			
Tesco Extra, Sprowston	Broadland	53.8	Out-of-centre
Sainsbury's, Costessey	South Norfolk	50.1	Out-of-centre
Morrisons, Riverside	Norwich City	43.5	Large District Centre
Tesco, Harford Bridge	South Norfolk	40.0	Out-of-centre
Asda, Hellesdon	Norwich City	38.2	Out-of-centre
Asda, Hall Road	Norwich City	35.3	District centre
Waitrose, Eaton Centre	Norwich City	35.0	District centre
Sainsbury's, Brazen Gate	Norwich City	30.0	Edge-of-centre (Norwich city ctr)
Sainsbury's, Thorpe St. Andrew	Broadland	28.8	District centre
Tesco, Drayton	Broadland	17.0	Out-of-centre
Aldi, Larkman Lane	Norwich City	16.4	District centre
Aldi, Plumstead Road	Norwich City	14.6	District centre
Morrisons, Old Catton	Norwich City	13.8	District centre
South Norfolk Main Towns			
Morrisons, Diss	South Norfolk	45.0	Edge-of-centre
Morrisons, Wymondham	South Norfolk	32.9	Out-of-centre
Tesco, Diss	South Norfolk	25.6	Edge-of-centre
Aldi, Diss	South Norfolk	24.5	Edge-of-centre
Waitrose, Wymondham	South Norfolk	17.0	Out-of-centre
Co-Op, Long Stratton	South Norfolk	10.8	Town centre
Broadland Main Towns			
Tesco, Aylsham	Broadland	20.5	Out-of-centre

Source: Table 5, Appendix II. All foodstores with a convenience goods turnover in excess of £10.0m shown.

Other inputs into the quantitative need assessment

Sales Efficiency

7.29 It is also necessary to factor in changes in respect of 'sales efficiencies'. These represent the ability of retailers to increase their productivity and absorb higher than inflation increases in their costs (such as rents, rates and service chargers) by increasing their average sales densities. The application of a turnover 'efficiency' growth rate is a standard approach used in retail capacity studies. Guidance on sales efficiencies is set out in Experian's Retail

Planner Briefing Note 14 (November 2016), and for the purposes of our capacity modelling we adopt the following annual sales efficiency rates, which are held throughout the duration of the study period to 2037.

- **Comparison goods:** for the Norwich urban area (which includes retail floorspace in the city centre, large district centres and retail parks) we have adopted a sales efficiency of 2.3% per annum from 2019-23, and 2.2% per annum from 2023 to 2037. This reflects the upper end of the sales efficiency forecasts set out in Experian Retail Planner 14, and reflects the fact that the city centre and other locations in the urban area has a significant amount of modern comparison goods floorspace which may offer scope to trade more efficiently in the future.

Applying the current comparison goods turnover of Norwich city centre (£1,263.5m¹⁵) to the estimated comparison goods floorspace in the city centre (166,825 sq.m net) identifies that comparison goods floorspace in the city centre currently achieves a sales density (turnover per sq.m) of approximately £7,600 per sq.m. Whilst this can be considered to be a reasonable performance, it is considered that there is scope for this floorspace to trade more efficiently over the course of the new GNLP period, given the higher-order role and function of Norwich city centre and its region-wide catchment. Accordingly it is appropriate to make allowance for improvements to the performance of existing comparison goods floorspace to come forward. In our capacity forecasts for new comparison goods floorspace for the Norwich urban area, we have assumed that new floorspace will achieve a sales density of £8,000/per sq.m.

For Rural South Norfolk and Rural Broadland, the historic nature of the majority of units in the Main Towns means there is more limited scope for sales efficiencies to be gained, and for these locations we use a sales efficiency of 1.75% per annum throughout the period to 2037. In our capacity forecasts for new comparison goods floorspace we have assumed that new comparison goods floorspace in Rural South Norfolk will achieve a sales density of £6,000 per sq.m, and new comparison goods floorspace in Rural Broadland will achieve a sales density of £5,000 per sq.m.

- **Convenience goods:** a sales efficiency rate of 0.3% per annum is used across the GNLP area for the duration of the period to 2037.

Floorspace Data

7.30 The comparison and convenience goods floorspace data which we incorporate into our model has been drawn from a range of data sources, including the Institute of Grocery Distribution (IGD), Experian Goad, the Trevor Wood Retail Warehouse Database, and the councils' own planning application records. Our floorspace assumptions for foodstores make allowance for a proportion of the sales area of the foodstore to be used for the sale of comparison goods (in supermarkets, this may include books, stationery, home entertainment, small electrical items, and so on).

¹⁵ Excluding comparison goods turnover of Anglia Square and Riverside large district centres

8. Quantitative retail capacity forecasts

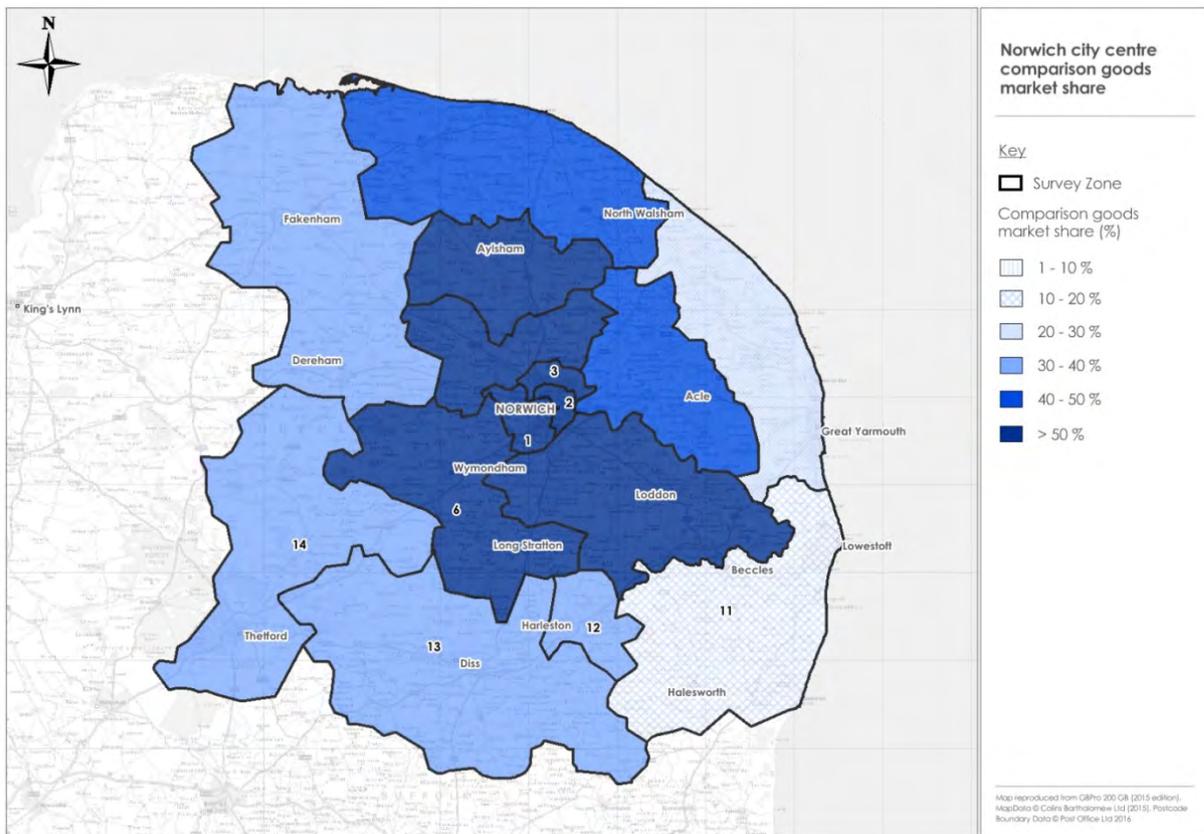
8.1 In the previous section of this report, we set out the key inputs into the quantitative 'need' assessment; in this section we build on these inputs to identify the quantitative capacity for comparison goods (non-food) and convenience goods (food) floorspace which needs to be planned for in the Greater Norwich area over the new Plan period to 2037. For both sets of forecasts, we identify a range of capacity forecasts which are based on different levels of potential growth of 'special forms of trading' (such as online shopping) coming forward in the survey area. First, however, we identify the comparison goods shopping catchments for each of the key centres in the Greater Norwich area. The discussions in this section should be considered alongside the data tables at Appendix I (for comparison goods) and Appendix II (for convenience goods) of Volume 3 of this report.

Comparison goods shopping patterns by location

Norwich city centre

8.2 As we have established, Norwich city centre is the highest order centre within the Greater Norwich area. Its comparison goods turnover of £1,263.5m is evidence of the regional-scale role the city centre plays as a comparison goods shopping destination. The city centre accounts for almost £1 in every £2 spent on comparison goods shopping in the survey area. Accordingly, the city centre has a catchment that extends across the entirety of the 15-zone survey area, as shown in Figure 8.1.

Figure 8.1: Norwich city centre catchment area (comparison goods)



Source: Table 4, Appendix I

- 8.3 Figure 8.1 shows that Norwich city centre has a clear 'core catchment' of zones 1-3 (which cover the Norwich urban area), plus zones 5 (Loddon), 6 (Wymdonham / Long Stratton), 7 (north of Norwich) and 8 (Aylsham). From each of these zones, Norwich city centre's market share is above 50%.
- 8.4 Analysis of the comparison goods market shares at the zonal level (Table 4, Appendix I) shows that the city centre attracts a market share of over 75% from two of these zones, zones 1 and 2. These two zones cover much of the Norwich urban area (with zone 2 covering the city centre itself) and therefore these high market shares show that the vast majority of residents in these zones are choosing to visit the city centre for their comparison goods shopping. In the remaining core catchment zones, the city centre's market share is between 50 and 70%. Interestingly from zone 3, despite the close proximity of this zone to the city centre, it only attracts a market share of 63.7%, with most of the remainder of the market share from this zone accounted for by various retail parks across the Norwich urban area.
- 8.5 Norwich city centre then has a secondary catchment area from which it attracts a market share of between 30 and 50% — this comprises of zone 4 (Broads/Acle), zone 9 (Cromer/Sheringham), zone 12 (Harleston), zone 13 (Diss), zone 14 (Thetford/Attleborough) and zone 15 (Fakenham/Dereham). Whilst Norwich city centre attracts a strong trade draw from each of these areas, these areas are served by a network of market towns and smaller settlements to which many residents prefer to look towards for their comparison goods shopping, rather than travelling the longer distance to Norwich city centre.
- Norwich city centre attracts a market share of 42.8% from **zone 4**, with competition for market share from Great Yarmouth (21.0% market share);
 - Norwich city centre attracts a market share of 45.1% from **zone 9**, but some residents choose to undertake their comparison goods shopping at smaller centres within the zone, including North Walsham (11.6% market share), Cromer (9.0% market share) and Holt (8.8% market share).
 - In **zone 12**, Norwich city centre attracts a market share of 34.7%, with Harleston attracting a market share of 35.9% and Diss a market share of 11.1%.
 - In **zone 13**, Norwich city centre attracts a market share of 32.8%, with Diss attracting market share of 38.4% and Bury St Edmunds a market share of 11.8%.
 - In **zone 14**, comparison goods shopping is largely split between Norwich city centre (market share of 32.8%), Thetford (22.2%) and Attleborough (10.5%).
 - In **zone 15**, comparison goods shopping is split between Norwich city centre (38.8%), Dereham (28.3%) and Fakenham (16.4%).
- 8.6 These patterns of shopping are not a reflection of any underperformance of Norwich city centre as a shopping destination, but rather a reflection of the distance these secondary zones are from Norwich. Some of the centres also have relatively limited public transport accessibility to/from Norwich. It is, of course, positive to note that the network of Main Towns and other centres have a role and function as comparison goods shopping destinations in their own right, and we discuss the catchment of these settlements separately below.
- 8.7 The two survey area zones over which Norwich city centre has a more limited influence are zones 10 and 11. Residents in zone 10 travel to destinations in Great Yarmouth for the majority of their comparison goods shopping (although Norwich city centre still attracts a market share of 25.4% from this zone), whilst in zone 11 Norwich city centre only attracts a market share of 19.8%, with residents undertaking comparison goods shopping in Lowestoft (39.2%) and Beccles (15.7%).

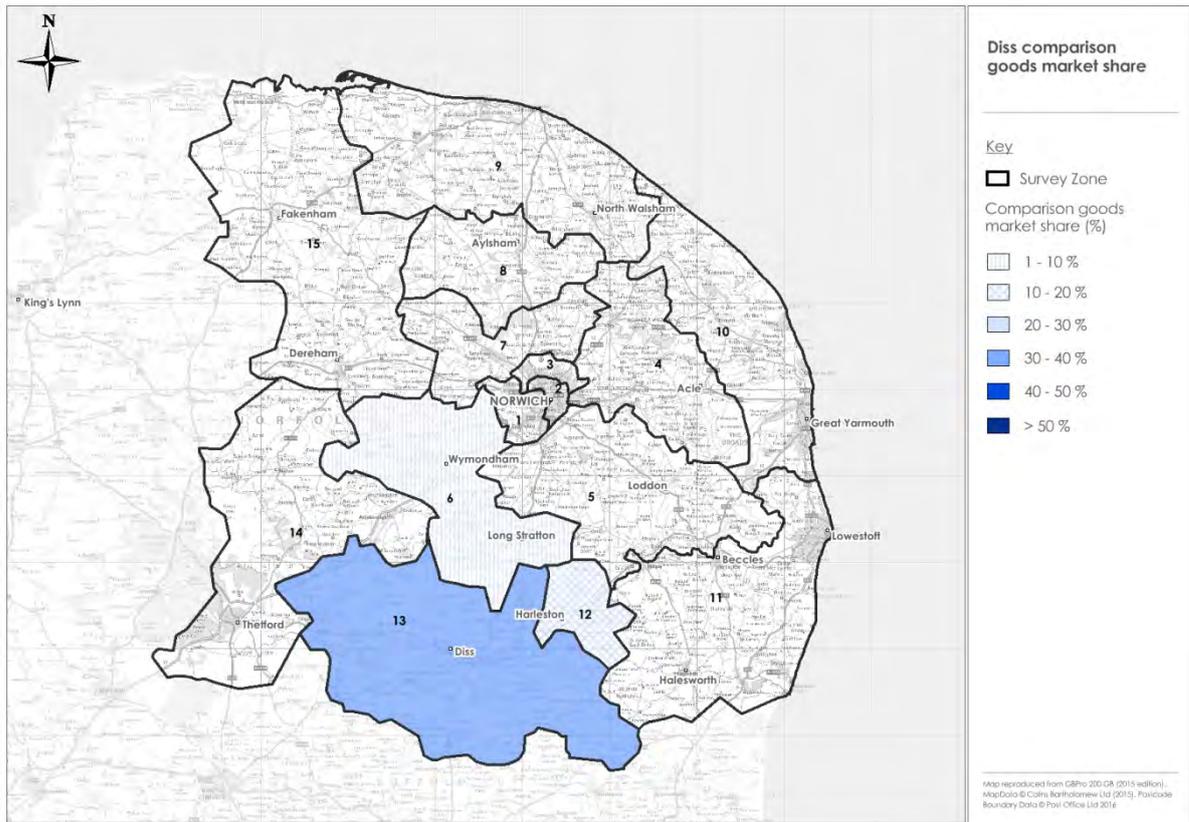
Other retail locations in Norwich

- 8.8 In addition to the city centre, Norwich has a number of other destinations where residents in the survey area are travelling to in order to undertake comparison goods shopping. In particular there is a network of retail parks across the Norwich urban area, the most popular of which are:
- **Sweet Briar Retail Park** draws £56.1m of comparison goods spend from the survey area, including a 5.3% market share from zone 3 and smaller market shares from each of the remaining 14 survey zones
 - **Sprowston Retail Park** draws £47.5m of comparison goods spend from the survey area, including a 6.6% market share from zone 4 and a 6.0% market share from zone 3. The retail park draws market share from 14 of the 15 survey zones.
 - **Hall Road Retail Park** draws £39.0m of comparison goods spend from the survey area, including a 4.4% market share from zone 1, It draws market share from 13 of the 15 survey zones.
 - **Longwater Retail Park** at Costessey draws £37.1m of comparison goods spend from the survey area, including a 7.0% market share from zone 6 and a 4.7% market share from zone 7, both of which are easily accessible to Costessey via the A47. The adjacent Next Home & Garden store, which recently commenced trading, draws a further £2.6m of comparison goods spend.
 - The standalone B&Q store at Boundary Road in Hellesdon also appears to be a popular shopping destination in its own right, drawing £37.4m of comparison goods spend. The other B&Q store in Norwich, at Neatmarket, does not feature prominently in the survey results and it is possible that some respondents may have confused the location of the two stores.
- 8.9 Residents in zone 3 are particularly well placed in terms of access to both Sweet Briar Retail Park and Sprowston Retail Park and this is likely to be why Norwich city centre has a lower market share from this zone relative to the other two survey zones which cover the Norwich urban area (zones 1 and 2).
- 8.10 Riverside district centre also has retail offer which is akin to that of a retail park, and accordingly the centre also draws market share from a wider catchment than might typically be expected from a district centre. Riverside attracts a comparison goods turnover of £38.0m, and draws a 5.6% comparison goods market share from both zones 2 and 3.

South Norfolk Main Towns

- 8.11 As we have set out above, the Main Towns all have their own role and function as meeting local comparison goods shopping needs. Whilst none of these would be expected to have a catchment as extensive as Norwich's, the rural nature of the survey area means that many of these centres still act as a hub for quite extensive catchment areas. Our health check surveys of these centres have confirmed that these settlements have a comparison goods offer that is largely focussed around meeting day-to-day shopping needs (as opposed to being 'destination' comparison goods shopping destinations in the way Norwich city centre is) and in many of that centres that offer is limited owing to the small size of the centres. We discuss each centre in turn below.
- 8.12 **Diss** has the highest comparison goods turnover of any of the South Norfolk Main Towns, drawing £78.1m of comparison goods spend from the survey area. Diss falls within zone 13 and the town centre accounts for 38.4% of the market share from this zone (with the majority of the remainder accounted for by Norwich). It also attracts minor market shares of 11.1% from the adjacent zone 12 and 1.9% from zone 6. The comparison goods catchment area for Diss is shown in **Figure 8.2**.

Figure 8.2: Diss catchment area (comparison goods)



Source: Table 4, Appendix I

- 8.13 **Wymondham** town centre draws £31.0m of comparison goods spend from the survey area, with virtually all of this drawn from its 'local' zone, zone 6, from where it attracts a 17.2% market share. Its lower market share reflects its more limited comparison goods offer when compared to Diss, and is also likely to be a product of its closer proximity to Norwich. Wymondham does not attract a market share of more than 1% from any of the remaining survey zones.
- 8.14 **Harleston** town centre has a comparison goods turnover of £15.0m, again reflecting its relatively limited comparison goods offer (the town centre as whole comprises of less than 100 units). Nevertheless it attracts a stronger market share from its 'local' zone (zone 12) than Wymondham, drawing a 35.9% market share from residents in this zone. Again, Harleston's influence beyond is limited, as its catchment is tempered by a number of surrounding locations such as Diss, Halesworth and Beccles.
- 8.15 **Loddon and Long Stratton** do not attract noteworthy comparison goods market shares. Loddon attracts a 2.5% market share from its 'local' zone, zone 5, whilst Long Stratton attracts a 3.1% market share from zone 6. The centres achieve comparison goods turnovers of £3.8m and £5.6m respectively, which reflects the fact that both centres only function as meeting limited day-to-day comparison goods shopping needs.

Broadland Main Towns

- 8.16 In Broadland, **Aylsham** is another centre which has a limited role and function as a comparison goods shopping destination, but nevertheless draws £11.1m of comparison goods spend from the survey area. Its market share is limited to its local zone, zone 8, from where it draws a market share of 13.4%.

Identification of comparison goods capacity

- 8.17 Having undertaken the above assessment of comparison goods catchments and trading performance, we are in a position to establish the quantum of new comparison goods floorspace which the Councils should seek to plan for over the course of the study period to 2037. In assessing the capacity for future comparison goods floorspace, we have assumed that existing comparison goods floorspace will increase its sales efficiency (i.e. its turnover per sq.m) over the course of the study period, with allowance made for a greater level of sales efficiency gain in Norwich city centre, which benefits from a good amount of quality floorspace in relatively modern, well-sized units.
- 8.18 We have assumed that new comparison goods floorspace in the Norwich urban area will achieve a sales density of £8,000 per sq.m, which is considered to be a reasonable proxy for the trading performance of new, modern comparison goods floorspace in a regional-scale shopping destination. It would not be realistic for the Main Towns and other centres to achieve a comparable sales density, and so for these locations we have applied a sales density of £6,000 per sq.m for rural South Norfolk and £5,000 per sq.m for rural Broadland; these sales densities have been informed by the current trading performance of floorspace within the respective authority areas.
- 8.19 In identifying capacity, it is particularly important to note that forecasts are increasingly open to margins of error over time, and accordingly will need to be refreshed over the study period. For this reason, we advise that the identified forecasts of both comparison and convenience goods 'need' beyond 2027 should be considered indicative only (these are shown italicised in the summary capacity tables set out in Appendix I).

Commitments for new comparison goods floorspace

- 8.20 In identifying future retail capacity, it is necessary to take into account 'commitments' for new retail floorspace which will act as 'claims' on the amount of comparison goods spending which is available to support new floorspace. The commitments have been provided to us by the project team and are listed at Table 7 of Appendix I, which shows their forecast turnover at the interval years of 2022, 2027, 2032 and 2037. We have assumed that all commitments will come forward by 2022. All of the commitments which have been identified are for the Norwich urban area, although a number fall within Broadland District. In forecasting turnovers we have had regard to operator sales densities, or, where relevant, updated turnover figures from submitted planning application documentation.
- 8.21 The comparison goods commitments which we have taken into account are listed below; it should be noted that some of the commitments have commenced trading, but were not at the time of the household survey, and therefore are factored in here.
- Wickes, Hellesdon Hall Road / Sweet Briar Road, Norwich (estimated comparison goods turnover at 2022 of £2.4m)
 - Extension to Primark, Norwich city centre (£10.3m comparison goods turnover at 2022)
 - Postwick Hub, Broadland Gate (£3.0m comparison goods turnover at 2022)
 - North Sprowston and Old Catton urban extension – new centres (£13.1m comparison goods turnover at 2022)
 - Taverham, Fir Court Road (£17.4m comparison goods turnover at 2022)
- 8.22 The 'baseline' comparison goods need for the Norwich urban area (which includes those parts of Norwich which fall within South Norfolk and Broadland authority areas), plus those for the Main Towns / Rural South Norfolk and Main Towns / Rural Broadland are shown in **Table 8.1**. This is the forecast comparison goods 'need' based on Experian population projections, national average comparison goods expenditure growth and 'special forms of trading' such

as online shopping. Projections are also based on a 'constant market share', that is assuming that current patterns of shopping, as identified by the household telephone survey, will remain unchanged throughout the study period.

- 8.23 We would expect that the majority of the identified quantitative needs for the Norwich urban area will be directed towards Norwich city centre, as the highest order centre in the region and the focus for comparison goods shopping.
- 8.24 **Table 8.1** shows that the Greater Norwich authorities will need to plan for additional comparison goods floorspace over the study period to 2037. There is a quantitative 'need' for up to 15,000 sq.m net additional comparison goods floorspace to be provided in the Norwich urban area over the period to 2027, rising to (indicatively) 53,700 sq.m net by 2037. For rural South Norfolk District, there is a requirement for 2,800 sq.m net additional comparison goods floorspace by 2027, increasing to (indicatively) 7,800 sq.m net by 2037. The requirements for rural Broadland District are more limited, with a requirement of 500 sq.m net by 2027, and indicatively 1,600 sq.m net by 2037.
- 8.25 Given the uncertainties in forecasting needs over the longer term, it is recommended that the GNDP authorities use the identified need figures to 2027 to inform preparation of the GNLP. Need figures beyond 2027 should be reviewed during the GNLP period.

Table 8.1: Comparison goods floorspace 'need' by authority area (baseline forecast)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Norwich urban area 'baseline' comparison goods requirement [^]	-300	15,000	31,200	53,700
Rural South Norfolk 'baseline' comparison goods requirement	800	2,800	5,000	7,800
Rural Broadland 'baseline' comparison goods requirement	100	500	1,000	1,600

Source: Table 7, Appendix I. [^]*Figures for Norwich are for Norwich urban area, including those parts of Broadland and South Norfolk which form part of the Norwich urban area *Figures are indicative only and should be subject to further testing during the GNDP plan period.

Comparison goods 'scenario testing'

- 8.26 The above comparison goods capacity forecasts represent the 'baseline' forecasts which the Greater Norwich authorities should seek to plan for, based on guidance on expenditure growth and growth in 'special forms of trading' (SFT) such as online shopping which are published by Experian. The SFT figures which have been used to inform these capacity forecasts are based on UK averages; Experian forecast that on average 13.8% of comparison goods expenditure is currently spent via SFT.
- 8.27 However, data from the household telephone survey undertaken in support of this study identifies that the 15 zones which comprise the survey area all have comparison goods SFT figures which are considerably above the UK average. This means that online shopping for comparison goods acts as a greater 'claim' on total comparison goods expenditure within the survey area than is the case when applying the UK average SFT figure. Current levels of comparison goods SFT range from 14.9% in zone 3 (North Norwich) to 32.6% in zone 11 (Beccles/Halesworth). The average comparison goods SFT figure for the survey area is 25.3%.
- 8.28 Therefore, in addition to the baseline comparison goods capacity forecasts set out above, we have undertaken a 'scenario test' which assesses the need for comparison goods floorspace which arises if a locally-derived level of SFT of comparison goods online is adopted in place of the Experian average UK SFT figure. In this scenario test modelling,

we have applied a SFT figure of 25.3% to the total amount of comparison goods expenditure available to the survey area, and then increased this SFT figure in line with the rates of comparison goods SFT growth forecast by Experian (see Table 8.2).

Table 8.2: Difference between Experian and local SFT rates

	Experian Retail Planner 13 SFT rate (baseline forecast)	Change	Local SFT rate (scenario test forecast)	Change
2017	13.20%	-	25.30%	-
2022	15.80%	+2.60%	27.90%	+2.60%
2027	16.10%	+0.30%	28.20%	+0.30%
2032	16.40%	+0.30%	28.50%	+0.30%
2037	16.50%	+0.10%	28.60%	+0.10%

Source: Experian Retail Planner 13, Figure 5 / NEMS Household Survey results

8.29 The modelling undertaken in support of this scenario is shown at Tables 8-10 of Appendix I and shows that:

- When making allowance for the higher rates of SFT, there is currently (at 2017) £2,367.6m of comparison goods expenditure available to the survey area (reduced from £2,751.1m under the 'baseline' scenario);
- By 2027, there will be £3,172.0m of comparison goods expenditure available to the survey area (reduced from £3,706.6m under the 'baseline' scenario);
- By 2037, there will be £4,544.1m of comparison goods expenditure available to the survey area (reduced from £5,314.2m under the 'baseline' scenario);
- Growth in comparison goods expenditure across the survey area between 2017 and 2037 reduces to £2,716.5m (from £2,563.1m under the 'baseline' scenario).

8.30 The lower levels of comparison goods expenditure which are, under this scenario, available to the survey area means that the need for new floorspace is reduced relative to the 'baseline' position which has been previously established. A summary of the comparison goods need arising under this scenario test is set out in Table 8.3.

Table 8.3: Comparison goods floorspace 'need' by authority area (baseline and local SFT forecasts)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Norwich urban area 'baseline' comparison goods requirement^	-300	15,000	31,200	53,700
Norwich urban area 'local SFT' comparison goods requirement^	-1,800	11,100	24,900	44,100
Rural South Norfolk 'baseline' comparison goods requirement	800	2,800	5,000	7,800
Rural South Norfolk 'local SFT' comparison goods requirement	600	2,300	4,100	6,500
Rural Broadland 'baseline' comparison goods requirement	100	500	1,000	1,600

Rural Broadland 'local SFT' comparison goods requirement	100	400	800	1,300
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Source: Table 7 and Table 10, Appendix I. ^*Figures for Norwich are for Norwich urban area, including those parts of Broadland and South Norfolk which form part of the Norwich urban area *Figures are indicative only and should be subject to further testing during the GNDP plan period.

8.31 Table 8.3 shows that under this scenario there remains a need for each of the three Greater Norwich authorities to positively plan for new comparison goods floorspace over the new GNDP period, with the need for new floorspace in the Norwich urban area reducing to 11,100 sq.m net by 2027. Under this scenario the comparison goods need for the Norwich urban area over the study period to 2037 decreases by just under 10,000 sq.m net relative to the baseline by the end of the Plan period. There are more modest decreases to the comparison goods capacity requirements for rural South Norfolk and rural Broadland.

8.32 Accordingly it is recommended that the figures set out in Table 8.3 represent the upper and lower forecasts for comparison goods which the Greater Norwich authorities should plan for. To summarise, it is recommended that the following comparison goods needs are planned for to 2027, with longer-term forecasts to 2037 reviewed during the new GNDP period.

- **Norwich urban area: between 11,100 and 15,000 sq.m net comparison goods floorspace by 2027**
- **Rural South Norfolk: between 2,300 and 2,800 sq.m net comparison goods floorspace by 2027**
- **Rural Broadland: between 400 and 500 sq.m net comparison goods floorspace by 2027.**

8.33 Again, it is recommended that longer-term forecasts beyond 2027 should be considered indicative and subject to future review.

Convenience goods shopping patterns

8.34 In the remainder of this section, we set out the capacity for additional convenience goods floorspace in the Greater Norwich area over the study period to 2036. Our discussion follows the same format as for the comparison goods capacity forecasts which are set out above. The discussion set out below should be read in conjunction with the data tables set out at Appendix II (Volume 3).

8.35 **Table 8.4** sets out the most popular convenience goods shopping in the 10 zones of the survey area which cover the Greater Norwich area. The key findings to take from this table are that:

- The Norwich urban area (zones 1/2/3) is evidently well-covered for foodstores, and in each of the three zones which cover this area there are different supermarkets attracting the highest market shares, suggesting that residents' needs are being satisfactorily met at the local level and residents are not required to travel a significant distance for their convenience goods shopping.
- Residents in zone 4 (Broads and Acle) split their convenience goods shopping trips between foodstores in Great Yarmouth and Norwich. At the time of the household survey, Acle was served by a small Co-Op in the centre of Acle and a Budgens on the edge of the urban area on Norwich Road. The in-centre Co-Op store achieved a market share of 6.9%, and the out-of-centre Budgens a 5.9% market share, from residents in zone 4. Since the survey was undertaken, the Budgens store has closed and been acquired by the East of England Co-Op, who have in turn closed the small in-centre Co-Op store. The Norwich Road store is of a sufficient size to enable day-to-day and some main food shopping needs to be met, although the fact that the majority of residents are choosing to look elsewhere for their food shopping (23.4% of residents in zone 4 travel to stores in Great Yarmouth and 17.2% travel to Sainsbury's at Thorpe St Andrew) suggests there is scope to improve

the sustainability of convenience shopping patterns in this zone, and there is now only one supermarket serving residents in this zone.

- Residents in zone 5 (which covers Loddon and its surrounding rural area) look to foodstores in Beccles, with some residents choosing to travel to Tesco in Harford Bridge, on the southern edge of Norwich. The Co-Op store in Loddon attracts a 8.9% market share from this zone, but at under 100 sq.m, is a very small supermarket and only offers limited food shopping choice. Again, it is considered there is scope to improve the sustainability of convenience shopping patterns in this zone.
- Residents in zone 6 (Wymondham) are largely choosing to undertake their food shopping at locations in the town, with Morrisons accounting for over one-quarter of the market share for this zone and Waitrose for a further 11.5%. Some residents are choosing to travel slightly further afield, including to Tesco at Harford Bridge (9.9% market share) and Sainsbury's at Longwater (5.8% market share). The Co-Op store in Wymondham town centre only attracts a 3.6% market share on account of its limited size and function. Consumer choice in the Wymondham area will be further enhanced once a proposed Lidl store at Farrier Close commences trading.
- Residents in zone 7, which covers the rural area to the north of Norwich, look towards foodstores on the northern side of Norwich for their convenience goods shopping, with the most popular foodstore being the Tesco store at Drayton. These patterns of shopping are to be expected given the absence of any market towns or larger settlements within zone 7 itself.
- In zone 8, which covers Aylsham and its surrounding rural area, the Tesco store in Aylsham enjoys a dominant position over convenience shopping patterns, accounting for over one-third of the market share for residents in this zone, and pointing to a lack of customer choice in this area. 11.8% of residents in this zone travel to foodstores in North Walsham (Sainsbury's, Waitrose, Lidl) for their food shopping.
- In zone 12, which covers Harleston, the Budgens store in Harleston attracts a market share of 28.4%, whilst much of the remaining market share is captured by foodstores in nearby Diss. There are also two small Co-Op stores in Harleston which attract market shares of 7.3% and 4.3% from residents in zone 12.
- Zone 13 covers Diss and the three most popular supermarkets for residents in this zone are all in Diss, suggesting that residents in this area have a good choice of foodstores to meet their food shopping needs. The most popular foodstore is the edge-of-centre Morrisons store, which accounts for one-third of all food shopping trips for residents in this zone.

Table 8.4: Most popular convenience goods shopping locations by zone (Greater Norwich zones only)

Zone	Most popular convenience shopping location (%)	Second-most popular convenience shopping location (%)	Third-most popular convenience shopping location (%)
Zone 1 (South/West Norwich)	Waitrose, Eaton Centre (17.2%)	Sainsbury's, Longwater (14.7%)	Aldi, Larkman Lane, Norwich (6.7%)
Zone 2 (Norwich CC/Riverside)	Morrisons, Riverside, Norwich (14.3%)	Sainsbury's, Brazen Gate, Norwich (13.2%)	Aldi, Sprowston Road, Norwich (8.7%)
Zone 3 (North Norwich)	Tesco Extra, Sprowston, (24.3%)	Aldi, Sprowston Road, Norwich (11.4%)	Morrisons, Riverside, Norwich (10.8%)
Zone 4 (Broads/Acle)	Great Yarmouth (all foodstores) (23.4%)	Sainsbury's, Thorpe St Andrew (17.2%)	Tesco Extra, Sprowston (11.8%)
Zone 5 (Loddon)	Beccles (all foodstores) (22.6%)	Tesco, Harford Bridge (14.7%)	Co-Op, Loddon (8.9%)
Zone 6 (Wymondham & Long)	Morrisons, Wymondham	Waitrose, Wymondham	Tesco, Harford Bridge

Stratton)	(27.1%)	(11.5%)	(9.9%)
Zone 7 (Rural north of Norwich)	Tesco, Drayton (18.5%)	Asda, Hellesdon (13.1%)	Sainsbury's, Longwater (11.9%)
Zone 8 (Aylsham)	Tesco, Aylsham (35.0%)	North Walsham (all foodstores) (11.8%)	Asda, Hall Road, Norwich (7.2%)
Zone 12 (Harleston)	Budgens, Harleston (28.4%)	Morrisons, Diss (19.6%)	Tesco, Diss (9.0%)
Zone 13 (Diss)	Morrisons, Diss (33.4%)	Tesco, Diss (19.8%)	Aldi, Diss (18.2%)

Source: Table 4, Appendix II

Convenience goods performance assessment

8.36 In Tables 6 and 8 of Appendix II, we have undertaken an assessment of the trading performance of the convenience goods floorspace across Greater Norwich, in order to establish the extent to which floorspace is trading in line with expected 'benchmark' levels (i.e. company averages for national operators).

8.37 In Table 6 of Appendix II we set out the trading performance of individual 'main foodstores, which shows that many foodstores across the Greater Norwich area are trading strongly, and a number are 'over-trading' substantially against their benchmark levels. The following conclusions can be drawn from the assessment in Table 6 of Appendix II:

- Foodstores in the Norwich urban area are, for the most part, trading well. There is a total of approximately 42,700 sq.m net 'main foodstore' convenience goods sales floorspace serving the city, which attracts a turnover of £471.0m against a 'benchmark' turnover of £407.5m. Therefore, collectively, 'main foodstores' in the city are 'over-trading' by approximately £63.5m.
- A number of foodstores in the city are trading particularly strongly. These include:
 - Aldi stores at Sprowston Road, Larkman Lane and Plumstead Road district centres, which are trading above company average levels by +£22.1m, +£9.9m and +£8.2m respectively.
 - Sainsbury's at Longwater, which is 'over-trading' by +£14.1m;
 - Tesco stores at Sprowston and Harford Bridge, which are 'over-trading' by +£7.6m and +£7.1m respectively.
- A small number of stores in Norwich are trading at below company average levels, including Sainsbury's at Thorpe St Andrew (trading at £8.4m below company average) and Morrisons at Old Catton (trading at £4.0m below company average). Most other foodstores are generally trading at or around company average levels.
- Foodstores in Diss all appear to be trading well, which each of the three main foodstores serving the town (Aldi, Tesco and Morrisons) all trading at above company levels. The Aldi store appears to be trading particularly strongly, at +£17.1m above company average levels.
- In Harleston, the Budgens store is trading slightly above company average levels, but the two small Co-Op stores in the town are trading at below company average levels, possibly because their small size means they are only used for low-spend top-up shopping trips.
- In Wymondham, foodstores are, on aggregate, trading at above average levels — however this is largely on account of the particularly strong performance of the new Morrisons store, which is trading at +£13.3m above company average. The opening of this store appears to have impacted on the trading performance

of the town's Waitrose store, which is trading at £6.9m below company average levels. The in-centre Co-op appears to be performing well, trading at +£2.2m above company average levels.

- Elsewhere in South Norfolk, Co-op stores in Loddon and Long Stratton are both trading comfortably above company average levels.
- In centres in Broadland, most foodstores are trading at around their respective company average levels. The Co-op store in Acle village centre was trading well prior to its closure, at +£4.8m above company average; it is reasonable to assume that most of this turnover will be transferred to the out-of-centre new Co-Op store in Acle. As the out-of-centre Co-Op store was also over-trading when operating as Budgens at the time of the household telephone survey, it is likely that the new Co-Op store is likely to be trading particularly strongly in the absence of any other competition in Acle. The Budgens store in Aylsham is the only store in the area which is noticeably under-trading, at £2.2m below company average.

8.38 By applying the total amount of convenience goods floorspace for each centre to the total convenience goods turnover of the main foodstores serving that centre, we can get an indication of the average turnover per sq.m foodstores in each location are achieving. **Table 8.5** shows the 'benchmark' and actual sales densities achieved by main foodstore floorspace in Norwich and each of the Main Towns. To put the figures into context, the average convenience goods sales density for the 'big four' supermarket retailers (Asda, Morrisons, Sainsbury's and Tesco) ranges from c. £11,500 per sq.m to c. £13,500 per sq.m — therefore any sales densities in excess would indicate that existing convenience goods floorspace is likely to be 'over-trading'.

Table 8.5: Summary of trading performance of convenience goods floorspace by centre

	Turnover per sq.m of 'main foodstores' convenience goods floorspace (based on household survey results) (£ per sq.m)	Benchmark 'main foodstore' sales density for centre (£ per sq.m)
Norwich	11,286	9,765
Aylsham	10,365	8,993
Diss	16,386	11,864
Harleston	5,336	7,741
Wymondham	14,455	12,176

Source: Table 6, Appendix II

8.39 Table 8.5 accordingly confirms that convenience goods floorspace in Diss and Wymondham is trading particularly strongly at present, and convenience goods floorspace in Aylsham and across the Norwich urban area is also trading well. Harleston is the only location where convenience goods floorspace is trading at below average levels.

Identification of convenience goods capacity

8.40 Having set out the population and expenditure growth expected to come forward in the convenience goods sector (Section 6) and undertaken the analysis of shopping patterns (above), **Tables 8.6-8.8** shows the capacity for additional convenience goods floorspace for each of the Greater Norwich authorities, and we discuss each of these in turn below. As with the comparison goods capacity forecasts set out above, it is important to note that forecasts become increasingly open to margins of error over time, and should be refreshed over the study period. We therefore again advise that forecasts beyond 2027 should only be considered indicative. In addition, findings should be

considered alongside our qualitative assessments set out previously in this report, as low / negligible capacity does not, in itself, mean there is no 'need' for additional floorspace.

Commitments for new comparison goods floorspace

- 8.41 Table 7 of Appendix II shows the commitments for new convenience goods floorspace in the study area which have been provided to us by the partner authorities, and we summarise these below. There is a considerable amount of permitted new convenience goods floorspace across the Norwich urban area, including new foodstores for Aldi at Drayton Road and Hall Road in Norwich (which are now trading but were not at the time of the household telephone survey), and a new Lidl store at Aylsham Road which will replace the company's existing smaller store at Copenhagen Way. New convenience goods floorspace has also been consented at Broadland Gate and as part of the proposed extension to Norwich at North Sprowston and Old Catton. In total we estimate that the convenience goods commitments for the Norwich urban area amount to a 'claim' in expenditure of £73.2m in 2022.
- 8.42 Outside the Norwich urban area, there is a commitment for a new Lidl store on the outskirts of Wymondham, which will occupy a unit currently occupied by Poundstretcher. We are not aware of any other convenience goods commitments in Rural South Norfolk or Rural Broadland.
- 8.43 The convenience goods commitments we have factored into our capacity forecasts are as follows:
- Aldi, Drayton Road, Norwich (£12.0m convenience goods turnover at 2022);
 - Aldi, Hall Road, Norwich (£11.8m convenience goods turnover at 2022);
 - Lidl, Aylsham Road, Norwich (£5.8m net additional convenience goods turnover at 2022);
 - Postwick Hub, Broadland Gate (£2.0m convenience goods turnover at 2022);
 - North Sprowston and Old Catton urban extension – new centres (£13.2m convenience goods turnover at 2022)
 - Taverham, Fir Court Road (£27.m convenience goods turnover at 2022);
 - Lidl, Farrier Close, Wymondham (£8.0m convenience goods turnover at 2022).

The need for new convenience goods floorspace

- 8.44 Having factored in the above commitments, **Table 8.6** shows the convenience goods floorspace requirement for the **Norwich urban area**, which includes Norwich City in its entirety plus those parts of the Norwich urban area which fall within South Norfolk and Broadland. It shows, on account of the considerable number of commitments for new floorspace, coupled with the limited expenditure growth in the convenience goods sector which this study has forecast to come forward, there is no quantitative need for any additional convenience goods floorspace to be planned for in the Norwich urban area over the period to 2027, with only a very modest need arising at the end of the Plan period. However as this study has set out there are also qualitative considerations for new convenience goods floorspace which the GNDP authorities will need to plan for.
- 8.45 In addition to the above we are aware of a number of further undetermined applications for new convenience goods floorspace in the Norwich urban area, including an application for sub-division and alterations to the B&Q store at Neatmarket to allow occupation by operators Lidl, B&M and Smyth's Toys, as well as an application for a new Lidl store at Blue Boar Lane, Sprowston. If these applications are permitted (by Norwich City Council and Broadland District Council respectively) then the forecast oversupply of convenience goods floorspace will be greater than shown in Table 8.6.

Table 8.6: Convenience goods floorspace 'need' for Norwich urban area (baseline forecast)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Norwich urban area convenience goods requirement	-3,900	-3,300	-2,600	300

Source: Table 8, Appendix II *indicative only, should be subject to review

8.46 **Table 8.7** shows that there is a requirement for **South Norfolk Council** to plan for approximately 3,700 sq.m net additional convenience goods floorspace by 2027, increasing (indicatively) to 5,100 sq.m net by 2037. This figure is for the Main Towns and Rural South Norfolk, and the Council will also need to work with Norwich City Council to address the separately-identified capacity requirements for the Norwich urban area, as set out above. Of the total Main Towns / Rural South Norfolk requirement of 3,700 sq.m net by 2027 / 5,100 sq.m net by 2037, there is a requirement for:

- Up to 2,500 sq.m net by 2027 / 3,100 sq.m net (indicatively) by 2037 convenience goods floorspace for Diss;
- Up to 300 sq.m net by 2027 / 800 sq.m net (indicatively) by 2037 convenience goods floorspace for Wymondham, with the majority of Wymondham's quantitative need met by the recent permission for a new Lidl store;
- Up to 1,200 sq.m net by 2027 / 1,400 sq.m net by 2037 convenience goods floorspace for other towns / smaller centres in Rural South Norfolk,
- There is an over-supply of -300 sq.m net convenience goods floorspace at 2027 for Harleston, reducing to -200 sq.m net by 2037, and therefore there is no quantitative need to plan for any additional convenience goods provision to serve Harleston.

Table 8.7: Convenience goods floorspace 'need' for South Norfolk (baseline forecast)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
South Norfolk Main Towns / Rural Area convenience goods requirement	3,400	3,700	4,000	5,100
Of which, Diss	2,300	2,500	2,600	3,100
Of which, Harleston	-300	-300	-300	-200
Of which, Wymodnham	200	300	400	800
Of which, Rural Centres / Other	1,200	1,200	1,300	1,400

Source: Tables 9a-9e, Appendix II *indicative only, should be subject to review

8.47 **Table 8.8** shows that there is a requirement for Broadland District Council to plan for approximately 800 sq.m net additional convenience goods floorspace by 2027, increasing to (indicatively) 1,000 sq.m net additional convenience goods floorspace by 2037. Again, this figure is for those parts of Broadland which fall outside the Norwich urban area, and Broadland District Council will also need to work with Norwich City Council to address the separately-identified convenience goods capacity requirements for the Norwich urban area. The requirement for Broadland is generated by the strong performance of foodstores in the district's smaller centres such as Acle and Horsford; there is no quantitative need for the Council to plan for any additional convenience goods floorspace in Aylsham.

Table 8.8: Convenience goods floorspace 'need' for Broadland (baseline forecast)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Broadland Main Towns / Rural Area convenience goods requirement	700	800	800	1,000
Of which, Aylsham	-100	-100	-100	0
Of which, Rural Centres / Other	900	900	900	1,000

Source: Tables 10a-10c, Appendix II *indicative only, should be subject to review

9. Commercial leisure assessment

- 9.1 As this study has established, commercial leisure and cultural uses are playing an increasingly important role in the vitality and viability of centres, by providing complementary uses that strengthen both the daytime and evening economies of a centre. People in the UK are increasingly choose to spend a greater proportion of their disposable income on 'experiences', which includes eating out, short breaks, going to music concerts or festivals, and so on, rather than on shopping. That is not to say that retail will not continue to be the principal driver of in centres - indeed previous sections of this study have confirmed a positive need for each of the Greater Norwich authorities to plan for new comparison goods retail floorspace - but the provision of quality complementary commercial leisure uses is likely to become increasingly important.
- 9.2 Evidence of these shifts in consumers' behaviour are apparent in the Office of National Statistics' annual report into consumer spending habits. For the year to March 2016, average weekly family spending on 'recreation and culture' was £68.00; average weekly family spend on food and non-alcoholic drinks was £56.80; average weekly family spend on restaurants and hotels was £45.10; and average weekly family spend on alcoholic drinks (and tobacco/narcotics) was £11.40. To compare, the average weekly family spend on clothing and footwear is £23.50. The commercial leisure sector is therefore a significant revenue generator, and forecasts from Experian (discussed further below) show that expenditure growth in some parts of the commercial leisure sector is expected to outstrip that of food and non-food goods over the course of the GNL period.
- 9.3 Drawing on the findings of the household telephone survey, and our own qualitative assessments of the commercial leisure offer in each of the centres considered by this study, in this section we review the current provision of commercial leisure uses - namely provision of restaurants, cafes, cinemas, pubs, bars/clubs, theatre, health & fitness, entertainment venues, and cultural facilities. The outputs identify performance, extent of customer choice, level of attraction, and any apparent qualitative gaps in the offer of centres. Following on from this, we then consider the growth in commercial leisure spend which is expected to come forward over the study period.
- 9.4 We have identified previously that Norwich city centre is, reflecting its region-wide catchment, already home to a wide variety of commercial leisure attractions, scattered across the city centre and also playing an important role in the vitality and viability of Riverside District Centre, which acts as a successful leisure destination in its own right. We understand from Norwich City Council that there has been a net loss of class A1 retail units in the city centre since the 2007 Study to class A3/A4 uses, a reflection of the wider trends discussed above and previously in this report. We would expect this trend to continue moving forward, although this will need to be carefully balanced with protecting the city centre's important retail function; we return to discuss this point in the following section.

Leisure choices

- 9.5 The household telephone survey results identified the following leisure activities to be most popular for residents in the survey area:
- Visiting the cinema: **54.5% of respondents**;
 - Visiting cafes: **52.3%**;
 - Evening eating out: **50.6%**;
 - Daytime eating out: **45.8%**;
 - Visiting the theatre: **43.5%**;
 - Visiting pubs and bars: **43.1%**;

- Visiting museums: **24.9%**;
- Visiting family entertainment facilities (e.g. tenpin bowling, ice skating): **24.0%**;
- Visiting live music venues: **18.4%**; and
- Using health & fitness facilities: **17.2%**.

9.6 As would be expected, the household survey results identified variances in these percentages at the zonal level, and in the case of some types of leisure activity patterns of visits reflect proximity of access to the facilities in question. 9.7% of respondents stated that they do not participate in any times of commercial leisure activity. In most categories, it is apparent that the wide-ranging commercial leisure offer in Norwich city centre draws from a particularly wide catchment which often extends across the majority of the survey area.

Cinema

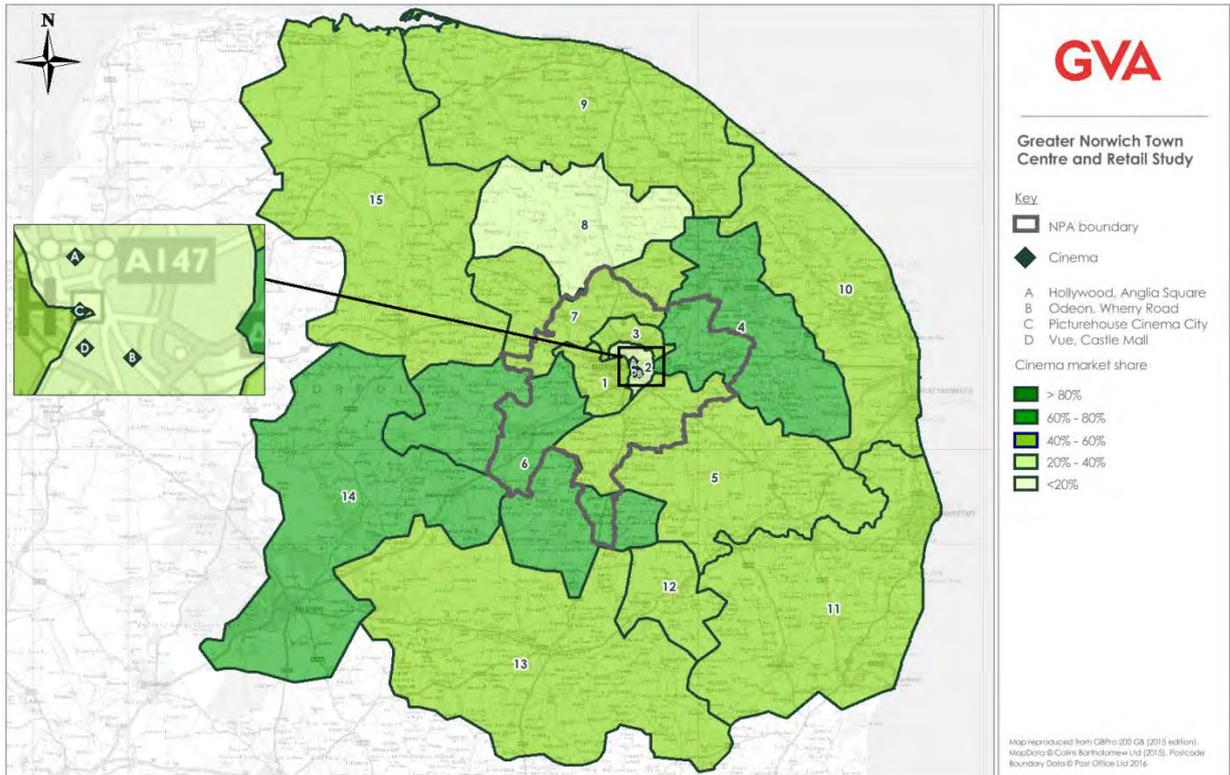
Most popular destination	2nd-most popular destination	3rd-most popular destination
Odeon, Norwich (50.7%)	Vue, Norwich (19.9%)	Picturehouse Cinema City, Norwich (9.2%)

Source: NEMS Household Survey results

9.7 Visiting the cinema is the most popular commercial leisure activity undertaken by residents in the survey area, with 54.5% of respondents stating they undertake this activity. The most popular location for cinema visits is the Odeon at Wherry Road, Norwich (Riverside), which has an aggregate market share of 50.7% and therefore accounts for 1 in 2 of all cinema visits undertaken across the survey area. The Odeon draws a noteworthy market share from each of the 15 survey zones, including 50% or more of the market share in all but three of the survey zones. Its market share only drops below 50% in zone 1 (Norwich South) and zone 2 (Norwich Central), as well as zone 8 (Aylsham), where the market share is split more broadly across a number of other cinema facilities in Norwich.

9.8 It is possible that the easier accessibility of Riverside, vis-a-vis the city centre, may be behind the fact that it draws a significantly higher market share than other cinema facilities in the city centre. There is also a strong range of completer leisure uses directly adjacent, including popular family dining restaurants such as Pizza Hut and Nando's. Riverside also offers free car parking to users of its leisure facilities such as the cinema, bowling, gym and trampolining, and the Odeon is also the only cinema in the survey area to offer IMAX viewing. These factors combined ensure the appeal of this facility is likely to be compelling and can be expected to contribute to its particularly strong market share. The catchment of the Odeon at Riverside is shown mapped at **Figure 9.1** confirming the extent of influence this cinema has over the survey area.

Figure 9.1: Odeon Norwich market share



Source: NEMS Household Survey results

- 9.9 Behind the Odeon at Riverside, cinema facilities in Norwich city centre also account for the second and third most popular destinations for residents in the survey area. The Vue at Castle Mall, attracts an aggregate market share of 19.9%, and is consistently the second-most popular choice for residents across the majority of the survey area.
- 9.10 The arts venue of Cinema City on St Andrew's Street in Norwich city centre is the third-most popular destination for cinema visits for residents in the survey area, attracting an aggregate market share of 9.4%. It is the most popular cinema facility for residents in zone 2 (Norwich Central), from where it attracts a noticeably strong market share of 45.9%. It also attracts a market share of 25.4% from residents in zone 1, plus 11.6% of the market share from residents of zone 4 (Acle), 13.1% of the market share from zone 8 (Aylsham), 11.6% of the market share from zone 12 (Harleston) and 11.7% of the market share from residents in zone 14 (Thetford).
- 9.11 Cinema City is a cultural venue in a Grade I-listed building, owned by Norwich City Council and managed by a charity, Cinema City Limited.



Commercial activities at the venue are operated by Picturehouse, a national chain of 'art house' cinemas, and the facility is badged as part of the Picturehouse chain. In addition to the film screenings, the charity offers a range of activities and courses such as film theory courses, educational screenings and workshops. The development therefore can be considered to make a positive contribution to the cultural offer of the city.

- 9.12 No other cinema facility attracts a market share of more than 5% from the survey area. The only other cinema in Norwich, the Hollywood Screen cinema in Anglia Square, attracts an aggregate market share of 3.2% from the survey area but does draw noteworthy market shares from zone 2 (Norwich Central, 10.1% market share), zone 3 (Norwich North, 16.9% market share) and zone 8 (Aylsham, 16.2% market share). Aside from these zones, its influence over the cinema visit patterns over residents in the survey area is much more limited.
- 9.13 Catchment plans of the Odeon (as shown in Figure 9.1), Vue, Picturehouse and Hollywood Screen cinemas are provided at Volume 2.
- 9.14 Once outside Norwich, the distribution of cinema facilities becomes more limited, and the only other centre within the GNPD area which offers cinema provision is the Aylsham Picture House in Aylsham. Run by a not-for-profit organisation, the group shows seasons of screenings from September to July - typically one film a month - at the Town Hall in Aylsham. Whilst not a permanent facility, this clearly represents an important contribution to the cultural offer of a smaller centre such as Aylsham which, owing to its small size, may not have the catchment to support a permanent cinema facility. The model of the Aylsham Picture House could potentially be adopted by other market towns, subject to there being appropriate venues and sponsorship in place.
- 9.15 Within the survey area but outside the GNDP authority areas, there are also cinema facilities in Lowestoft, Great Yarmouth, Fakenham, Dereham and Cromer. These attract market shares from their respective local zones to varying degrees, but do not generally exert much of an influence beyond this. Located outside the survey area, the Cineworld cinema in Bury St Edmunds draws a market share of 14.9% from zone 13 and 12.0% from zone 14.

Cafes

- 9.16 Visiting cafes is the second-most popular type of commercial leisure activity for those living in the survey area, with 52.3% of respondents stating they undertake this activity. Norwich city centre attracts an aggregate market share of 47.0% from the survey area, reflecting the fact that most people who undertake this type of activity are likely to combine it with another form of activity such as shopping (as previous sections have identified, Norwich city centre exerts a survey area-wide influence on comparison goods shopping patterns). No other centre attracts a noteworthy survey area-wide market share, which is to be expected as Norwich is the only principle 'destination' centre in the survey area.
- 9.17 A useful exercise to assess the adequacy of current levels of provision is to look at market shares for centres at the local level, and this exercise is set out below for zones 1, 2 and 3 (which cover Norwich), zone 6 (Wymondham and Long Stratton), zone 8 (Aylsham), zone 12 (Harleston) and zone 13 (Diss). This is known as the 'local retention rate' and shows the proportion of residents who visit cafes in their nearest local centre. This exercise is set out at **Table 9.1**.

Table 9.1: Local retention rate by zone for cafes

Centre	Local survey zone(s)	Market share for cafes from local zone (%)
Norwich city centre	Zones 1 / 2 / 3	96.3% / 93.9% / 82.9%
Loddon	Zone 5	2.8%
Wymondham	Zone 6	58.0%
Long Stratton	Zone 6	1.3%
Aylsham	Zone 8	52.7%
Harleston	Zone 12	46.2%
Diss	Zone 13	76.2%

Source: NEMS Household Survey results

9.18 Table 9.1 shows that local levels of market shares attracted to cafe facilities varies between each of the centres we have reviewed as part of this study. For Norwich, as would be expected the city centre accounts for virtually all of the market share from those residents living in the Norwich zones (zones 1, 2 and 3) plus a much wider area beyond this. Norwich city centre has a strong, lively and growing cafe culture, a mixture of established national operators, and a particularly strong array of independent operators, which are mostly clustered around the Norwich Lanes. Further discussion of this is provided in our health check analysis in Section 4.

9.19 Of the Main Towns, Diss performs strongly, attracting over 75% of the market share for residents in its local zone (zone 13). This suggests there is a relatively strong range of cafe facilities in the town (but is also likely to



partly be a reflection of the distance to other larger centres from Diss). Both Wymondham and Aylsham attract market shares of over 50% from their respective local zones, also suggesting a reasonably good level of provision at the local level, whilst Harleston's local market share falls slightly lower at 46.2%. In each of these centres, there is likely to be scope for improvements to market share over the course of the new GNLP period — although as noted above, as visits to these type of facilities are often aligned to other trips, such as shopping, and therefore we would not necessarily expect these smaller centres to achieve the same level of market share as we have seen from Norwich city centre, for example.

9.20 The smaller centres of Long Stratton and Loddon both, however, have negligible market shares from their respective local zones (1.3% and 2.8% respectively) and in both instances this suggests a shortfall in provision in these centres. Enhanced provision would result in longer dwell times and potentially linked trips to other businesses in the centre. In zone 5, which covers Loddon, the market share is currently captured by Norwich city centre (46.6%), Bungay (18.1%) and Beccles (16.0%). In zone 6, which covers Long Stratton, the market share is currently captured by Wymondham (58.0%) and Norwich city centre (35.1%).

9.21 Whilst the local market shares attracted to Wymondham, Aylsham, Harleston and Diss each suggest a good level of representation by café facilities in these centres, albeit one with scope for further improvement (although this is less applicable to Diss), the long-term vitality and viability of both Loddon and Long Stratton would benefit from the introduction of a greater range of class A3 uses, which, as noted above, could also deliver wider benefits to the vitality and viability of these centres.

Evening & daytime dining

9.22 50.6% of respondents across the survey area state they visit restaurants in the evening, making this the third most popular leisure activity for residents in the survey area. Again, the majority of this market share is accounted for by Norwich city centre (excluding Riverside), with an aggregate market share of 57.8% from across the survey area, and the city centre attracts a market share of over 50% from nine of the 15 survey zones, including market shares of 93.8% from zone 1, 98.0% from zone 2, 78.9% from zone 3, 76.7% from zone 4 and 77.6% from zone 7. Again, these are high market shares and confirm Norwich city centre to be performing strongly as a destination for evening dining, both

from its immediate urban catchment and a wider area beyond this. However, its influence does diminish more rapidly outside the aforementioned nine zones when compared to its comparison goods shopping catchment.

9.23 Despite this study identifying Riverside as having a relatively strong evening dining offer, particularly in respect of the presence of a number of family dining restaurants, alongside other commercial leisure facilities, it does not feature prominently as a popular destination in the survey results, attracting an aggregate market share of 1.4%. It does not attract a market share of more than 5% from any individual zone, with the exception of zone 9, from where a market share of 14.9% is attracted. It is possible, of course, that some respondents to the survey may have stated Norwich city centre when in reality they visited Riverside, given the close relationship (and overlapping catchment) which these two destinations. Qualitatively, it is clear from our audit of Riverside that the range of restaurants serving this centre is adequate in the context of the wider leisure offer of the centre and having regard to its role and function in the city's retail hierarchy.

9.24 In **Table 9.2** we show the 'local retention rate' for visits to evening restaurants for each of the other centres we have considered as part of this study. It shows that market shares retained by the other study area centres for evening dining is, in all instances except Loddon and Long Stratton, lower than that for cafes (Table 9.1), suggesting that the range of facilities available to local residents in these centres is more limited, and accordingly many residents are choosing to travel to destinations further afield. Again, Loddon and Long Stratton have the lowest market shares by some margin, reflecting their more limited size and offer.

Table 9.2: Local retention rate by zone for evening dining

Centre	Local survey zone(s)	Market share for evening dining from local zone (%)
Norwich city centre	Zones 1 / 2 / 3	96.3% / 93.9% / 82.9%
Loddon	Zone 5	3.4%
Wymondham	Zone 6	27.5%
Long Stratton	Zone 6	3.7%
Aylsham	Zone 8	14.7%
Harleston	Zone 12	34.4%
Diss	Zone 13	20.1%

Source: NEMS Household Survey results

9.25 In terms of competing destinations,

- Residents in zone 5 (Loddon) look towards Norwich city centre (60.5% market share), Bungay (14.9%) and Beccles (6.3%) to visit restaurants. Bungay is a village centre approximately 15 minutes' drive from Loddon, which contains a number of public houses and restaurants set around an attractive village centre; Beccles is located a similar distance to the south-east of Norwich.
- As well as Wymondham (27.5% market share), residents in zone 6 (Wymondham / Long Stratton) look towards Norwich city centre (55.4%) and Diss (11.7%) to visit restaurants.
- In zone 8 (Aylsham), most residents look towards Norwich city centre (63.8%). The small village Hoveton, to the north-east of Wroxham, also attracts a market share of 8.6%, likely a reflection of the centre's location on the Norfolk Broads. A market share of 4.2% is attracted to North Walsham.
- In zone 12 (Harleston), Harleston itself commands a relatively healthy market share of 34.4%, with Norwich city centre attracting a market share of 41.5%. A number of rural centres attract modest market shares including Fressingfield (6.5%) and Bungay (4.3%).
- In zone 13 (Diss), Diss itself attracts a noticeably lower market share of 20.1% compared to its local retention rate for cafes (76.2%), suggesting that a lack of evening restaurants represents a qualitative gap in the offer

of this centre. 39.7% of residents in this zone travel to Norwich, and 16.1% travel to Bury St. Edmunds, which has benefited from enhancements to its evening dining offer in recent years following the opening of The Arc, a new shopping and leisure development in the town centre which has attracted brands such as Byron, Carluccio's and Wagamama to the town. A further 11.5% of the market share from this zone is accounted for by the small village of Fressingfield, which has a number of country pubs.

9.26 Patterns of visits for daytime eating are broadly similar to those described above for evening restaurants visits described above. However certain centres attract stronger market shares for daytime eating from their respective local zones; for example Aylsham's market share from zone 8 is 31.4% (compared to 14.7% for evening restaurants visits), and Diss' market share is 41.1% from zone 13 (compared to 20.1% for evening restaurants visits), suggesting that many of the facilities in these centres only operate during retail trading hours.

Theatres

9.27 43.5% of respondents to the household survey stated that they visit the theatre, with the Theatre Royal in Norwich accounting for over three-quarters of all theatre visits. The art-deco venue has a capacity of 1,300 people, and originally opened in 1758 before being twice subsequently rebuilt. The theatre had a £10m refurbishment in 2007. The Theatre Royal attracts a range of touring and West End shows, and also produces an annual pantomime. It has recently introduced an education and training centre ('Stage Two') which works with local young people to provide training courses in theatre skills, educational visits and workshops. The theatre is well-located in the heart of the city centre, close to complementary bars and restaurants at Intu Chapelfield and the Norwich Lanes.

9.28 Other theatres/locations which attract smaller market shares from across the survey area include Norwich Playhouse, which attracts a 3.0% aggregate market share from across the survey area, including a 14.1% market share from zone 2 (Norwich Central & South). The Playhouse has a capacity of 300, and is set in an attractive riverside setting on the northern side of the River Wensum, easily accessible from the Norwich Lanes via St George Street. The Playhouse opened in 1995, in a former maltings building. The venue is a well-established destination for live comedy but also has a year-round theatre, musical and live music programme. Other theatre facilities in Norwich include the Maddermarket Theatre, Sewell Barn Theatre and Puppet Theatre, with the former of these drawing a small market share from 8 of the 15 survey zones.

9.29 Elsewhere within and surrounding the survey area, the Marina Theatre in Lowestoft attracts a 4.5% market share from the survey area, and the Theatre Royal in Bury St Edmunds a 3.7% market share. 2.7% of respondents visit the theatre in London.



Theatre Royal & Norwich Playhouse



Pubs and Bars

- 9.30 43.1% of respondents to the household survey stated that they visit pubs and bars, and whilst — in common with other commercial leisure categories — Norwich city centre was identified to be the most popular destination, attracting an aggregate market share from the survey area of 42.6%, there is a much more widespread distribution of market share across towns and villages in the survey area, reflecting the fact that many residents prefer to undertake this type of leisure activity more locally. This is reflected in the high number of responses in the 'other' category in answer to question 40 of the household survey.
- 9.31 One apparent anomaly in question 40 of the survey results is that Riverside does not feature prominently in the survey results as a standalone destination for pubs and bars visits. This is likely to be on account of respondents to the survey not identifying Riverside as a separate destination from that of Norwich city centre. We note that in response to question 16X of the household telephone survey, 10.7% of respondents who visit Riverside during the daytime 'always' visit the city centre as part of the same trip and 37.8% 'sometimes' visit both locations; it is reasonable to assume that there will be a similar degree of cross-visits between the two destinations in the evening,
- 9.32 In respect of the market towns, the survey identifies the following patterns of visits:
- Zone 5 (Loddon): the majority of residents in zone 5 visit destinations in Norwich for their pubs & bars trips (market share 42.8%). 17.8% of residents visit Beccles, whilst Loddon itself attracts a market share of 17.8%. Almost one-fifth of respondents state that they visit 'other' destinations.
 - Zone 6 (Wymondham/ Long Stratton): Wymondham performs strongly as a destination for pubs and bars, attracting a market share of 46.0% from residents in its local zone, zone 6, which is significantly higher than the market share attracted to Norwich (28.6%). Long Stratton also performs more strongly than in the other food and drink categories, attracting a market share of 12.3% from residents in zone 6. 13.1% of respondents visit 'other' destinations.
 - Zone 8 (Aylsham): Over half (52.5%) of respondents in this zone stated that they travel to Norwich for their visits to pubs/bars. Over one-quarter of respondents (27.5%) visit facilities in Aylsham; together these two locations account for 80% of the visit to pubs/bars for residents in this zone.
 - Zone 12 (Harleston): Harleston performs strongly in its local zone, attracting a market share of 59.3% from residents in zone 12, suggesting that there is a good range of facilities in respect of pubs/bars to meet local residents' needs. Harleston also attracts a small market share from neighbouring zone 13 (8.3%). Other locations which attract market share include Bungay (13.9%), Needham (8.0%) and Beccles (6.5%).
 - Zone 13 (Diss): Diss attracts a market share of 35.6% from residents in zone 13, but it does not draw any not noteworthy market share from any of the other survey zones. Norwich only attracts a market share of 17.8% from this zone, likely a reflection of the further distance many residents in this zone are to Norwich when compared to much of the rest of the survey area. Almost one-third of respondents (32.5%) in zone 13 gave an answer of 'other', suggesting that there is a wide network of rural pubs serving residents in this area.

Other Commercial Leisure Activities

- 9.33 The household survey also asked questions on patterns of visits for four other types of commercial leisure activity — visiting museums, visiting family entertainment facilities (such as ten-pin bowling and ice-skating), visiting live music venues, using health & fitness facilities, and visiting nightclubs. Each of these categories scored a response rate of under 25% from survey participants, and therefore we do not discuss the patterns of visit in as much detail as those set out above, however we provide a summary of each of these below.

Museums

- 9.34 24.9% of respondents across the survey area stated that they visit museums. Two-thirds of all respondents who visit museums stated that they visit the Norwich Castle Museum & Art Gallery, and this facility has a market share of over 50% from 13 of the 15 survey zones, with the highest market shares from zone 1 (92.3%) and zone 3 (84.9%). The Museum is part of a network of venues known as the Norfolk Museums Service, which includes three venues in Norwich, plus facilities in Kings Lynn, Thetford, Cromer, Dereham and Great Yarmouth. The exhibition galleries at Norwich Castle host a range of shows throughout the year from across the arts spectrum.
- 9.35 Elsewhere in Norwich, the Sainsbury Centre for Visual Arts, an art gallery and museum located on the campus of the UEA, is a further important cultural asset for the city. The Norman Foster-designed SCVA opened in 1978 and was Grade II*-listed in 2012. Its three permanent collections are supported by a range of temporary exhibitions. The SCVA attracts an aggregate market share of 4.9% from the survey area, but draws particularly strong market shares from its 'local' zone (zone 2) at 30.6%, plus zone 13 (18.4%). The venue's location on the UEA campus, away from the city centre, is likely to explain why its market share is not higher.
- 9.36 Representation from museum venues across the rest of the study area is more limited, although both Diss and Harleston have small museums in their respective town centres. 8.4% of respondents stated that they typically visit museums in central London.

Family entertainment

- 9.37 24.0% of respondents stated that they visited 'family entertainment' venues, which includes bowling alleys, gaming centres, ice skating, trampolining and so on. Over half (56.2%) of the market share for this type of leisure use is accounted for by the Hollywood Bowl facility at Riverside in Norwich, which attracts a market share of over 50% from 11 of the 15 survey zones, including a market share of 92.7% from zone 1 and 92.5% from zone 2, plus market shares of over 80% from zones 4 and 12. The Hollywood Bowl is evidently a popular facility therefore, and draws custom from an extensive catchment area. There are no other ten-pin bowling facilities serving the Norwich urban area, nor elsewhere in Broadland or South Norfolk authority areas, and whilst the high market shares attracted to Hollywood Bowl might suggest that an additional facility of this nature could be accommodated, our experience elsewhere suggests that these facilities require large catchments and therefore locations outside of Norwich may not be as attractive to operators.
- 9.38 Other family entertainment facilities in Norwich attract lower market shares, but nevertheless qualitatively are important additions to the commercial leisure offer. The Namco Funscape facility in Bowthorpe attracts a market share of 6.7% from across the survey area, and also offers ten-pin bowling, alongside video games, pool, a sports bar and bars/restaurants. The destination is particularly popular for residents in zones 7 and 8, from which it attracts a market share of 42.1% and 20.4% respectively, likely to be on account of the fact that residents in these zones are easily able to access the facility via the A47 or Ring Road, rather than travelling to the other side of the city centre to visit the facilities at Riverside.
- 9.39 Norwich also has representation from two trampolining venues — High Altitude Trampoline Park at Whistler Road in Hellesdon, and The Gravity Trampoline Park at Riverside. Both venues attract relatively modest market shares from survey area overall, but of note is that the former attracts a market share of 25.3% from residents in zone 3.

Live music

- 9.40 18.4% of respondents stated that they visit live music venues. Norwich offers a number of live music venues and accordingly these dominated the responses. The most popular destination in Norwich is the University of East Anglia

Students Union (35.1% market share from across the survey area) (the UEA Students Union is not within the city centre, but on the UEA campus on the western edge of Norwich). The most popular city centre venue is The Waterfront (19.0% market share from the survey area), a small (700 capacity main room / 200 capacity second room) live music and club venue located on King Street, which attracts a 19.0% market share from the survey area. The venue is also managed by the UEA Students Union. Norwich Arts Centre on St Benedict's Street attracts a market share of 4.5%, and OPEN, on Bank Plan (a live music and conference venue run by the OPEN Youth Trust) attracts a market share of 2.5%. No other venues in the city centre attract a market share although we note that many of Norwich's pubs also offer live music.

- 9.41 None of the other centres we have assessed in the study area offer live music venues which attracted a market share in the household survey, a reflection of the fact that facilities of this nature tend to be located in larger/regional centres which inherently have a larger catchment.

Health & fitness

- 9.42 Visiting health and fitness facilities is generally an activity undertaken at the local level, and accordingly patterns of visits vary considerably by survey zone, with no destinations drawing a survey area-wide market share as we have seen with other forms of commercial leisure considered in this section. We therefore review patterns on a zone-by-zone basis for those zones covering the key study centres; this exercise is set out below.

- For residents in zone 1, the facility which attracts the highest market share by some margin is the Sportspark facility at the UEA, which has a market share of 39.2%. The remaining market share is distributed across a wide range of facilities, including The Gym Group on Little Street (7.0%), Riverside Leisure Centre (6.2%), Holiday Inn on Ipswich Road (13.0%) and Dunston Hall (7.7%).
- For residents in zone 2, the most popular destinations are Riverside Leisure Centre (16.9%) and Style Health and Fitness on Ber Street (15.7%).
- For residents in zone 3, Norfolk Health & Racquets Club in Hellesdon is the most popular destination, attracting over half (54.8%) of the market share. Other popular destinations include Riverside Leisure Centre (21.2% market share) and Nuffield on Barrack Street in Norwich (8.5% market share).
- For residents in zone 5, residents generally look towards a variety of facilities in Norwich, with no single destination commanding a dominant market share.
- For residents in zone 6, the market share is retained more locally, as both Wymondham and Long Stratton offer leisure facilities operated by South Norfolk Council. Wymondham Leisure Centre, located on Norwich Road, attracts a market share of 43.0%; Long Stratton Leisure Centre, located on Swan Lane in Long Stratton, has a market share of 15.6%.
- For residents in zone 8, market share is again principally split between two facilities: the Victory Swim and Leisure Centre in North Walsham (within North Norfolk District), which draws a market share of 42.7%, and Aylsham Community Gym on Cawstin Road in Aylsham, which attracts a market share of 26.1%.
- Residents in zone 12 split their market share between a wide variety of destinations with no individual location capturing a significant market share; 74.3% of respondents answered 'other' to this question. 12.8% of respondents use the Harleston Community Leisure Facility at Wilderness Lane in Harleston.

Nightclubs

- 9.43 Only 5.5% of respondents to the survey stated they visited nightclubs. Destinations in Norwich accounted for 89.1% of the market share, whilst Great Yarmouth attracted a market share of 5.3%.

Expenditure growth in the commercial leisure sector

- 9.44 By applying the Experian population projections (used as the basis of our retail capacity forecasts) and the most up-to-date per capita expenditure data on commercial leisure spending (Experian, 2015), we can obtain an indication of the likely growth in commercial leisure expenditure available to residents of the survey area.
- 9.45 Whilst not all of this expenditure can, by default, be used to support the development of new commercial leisure facilities in the survey area — particularly because leisure spending is often undertaken with holidays, day trips, special occasions, and so on and so may in part be spent outside the survey area — it does provide an indication of the scope for additional development which could be supported. The findings of the below assessment should therefore be considered alongside our qualitative analysis of current (and planned) provision set out above.
- 9.46 Experian provide per capita leisure expenditure data on the following categories of commercial leisure spending:
- **‘Cultural services’** – this includes spending on cinema, theatre, museums, live music/entertainment, nightclubs, bingo, and TV subscriptions such as Netflix;
 - **‘Recreation and sporting services’** – this includes spending on admission to spectator sports (e.g. watching football matches) and subscriptions to sports/social clubs;
 - **‘Restaurants and cafes’** – this includes spending in both restaurants and cafes, and also includes spending on ‘alcoholic drinks consumed outside the home’ (i.e. in pubs and bars) and on take-aways. Spending on this type of leisure service accounts for the majority of residents’ commercial leisure spend, and, at the zonal level, ranges from £896 in zone 10 to £1,161 in zone 5.
- 9.47 Experian advise that spending on commercial leisure services will increase by 1.3% per annum from 2019-37, with lower levels of expenditure growth prior to this (0.5% 2017-18 and 0.2% 2018-19). By applying the average zonal per capita spend on the different types of commercial leisure activity to Experian’s population projections for the survey area (see Table 1, Appendix I), the total ‘pot’ of commercial leisure expenditure available to residents of the survey area can be calculated. The results of this exercise are summarised in **Table 9.3**.

Table 9.3: Growth in commercial leisure spending in study area, 2017-37

	2017 (£m)	2022 (£m)	2027 (£m)	2032 (£m)	2037 (£m)	Change 2017-37 (£m)
Cultural services	104.5	113.6	126.5	140.5	155.4	+50.9
Recreation & sporting services	42.1	45.8	51.0	56.7	62.7	+20.6
Restaurants & cafes	396.4	431.0	480.1	533.0	589.6	+193.2

Source: Experian Location Analyst, accessed July 2017

- 9.48 Table 9.3 shows that the vast majority of the leisure expenditure growth which is expected to come forward is in the ‘restaurants and cafes’ sector, which also includes spending growth in pubs and bars. Our assessment has set out how these uses already play an important role in contributing to the vitality and viability of Norwich city centre, but that some of the Main Towns are underprovided for, particularly in respect of evening restaurant/dining options. Table 9.3 shows that there is scope for further uses of this nature to be accommodated across the survey area. Further growth in Norwich City Centre should be supported as this study has demonstrated that these uses are an important secondary reason for visiting the centre (behind comparison goods shopping). Enhancement of the food/drink sector should also be an aspiration for each of the Main Towns, in order to help stimulate a stronger evening economy. Across centres at

all levels in the hierarchy a particular focus should be on the enhancement of the 'early evening' economy, i.e. places that offer dining options that trade during retail hours but extend to bridge the gap between when retail outlets close and night-time economy venues (bars (and nightclubs in the case of Norwich city centre)) become busy.

- 9.49 Growth in cultural services expenditure is more limited in comparison; however, there may be scope to support the enhancement of cultural services in some centres. The small size of many of the centres and the relatively limited populations in their hinterlands may limit their attraction to the market for many types of cultural services, as facilities such as cinemas, theatres and so on generally require extensive, fairly densely populated catchments to be successful. However larger Main Towns may be able to support small-scale 1 or 2-screen cinema developments for example, particularly if allied to an enhancement of the wider evening economy offer. Applications for enhancements of provision of this nature should, it is recommended, be considered on their individual merits but generally supported.
- 9.50 As a general rule, provision of new commercial leisure facilities should be centrally located within existing town centres where possible, in order to support the development of complementary uses and enhance the wider vitality and viability of the centre in question.

10. Summary and conclusions

- 10.1 GVA has been commissioned to undertake an **Employment, Retail and Town Centre Study** on behalf of the three local authorities (Norwich City Council, Broadland District Council, Norwich City Council and South Norfolk Council) and Norfolk County Council that make up the Greater Norwich Development Partnership (GNDP). This **Retail Study** report has specifically focussed on identifying the future requirements in respect of retail and commercial leisure needs, and this final section of the report draws together the key findings and conclusions. These key findings are then taken forward into the **Combined Strategy Paper** (which forms a separate report) which uses the findings of this study, together with the **Employment Land Assessment** which GVA have also prepared as part of this commission, to develop a series of strategies and recommendations for each of the centres in the study area which we have considered.
- 10.2 The findings of this evidence base study will be used to inform the emerging Greater Norwich Local Plan (GNLP). The Greater Norwich authorities have agreed to work together to prepare this emerging Plan, which will guide the future development of the Greater Norwich area over the period to 2036. This strategic approach to planning for future development and growth builds on long-established joint working arrangements for Greater Norwich by the GNDP; the same working arrangements delivered the current Joint Core Strategy (JCS), which guides development in the Greater Norwich area to 2026. A full consideration of the national and local planning policy context in respect of retail and town centres under which this study has been prepared is set out at Section 2 of this report.
- 10.3 We also expect that the findings of this study to be used by Broadland District Council, Norwich City Council and South Norfolk Council in assisting with the determination of planning applications for new retail and commercial leisure floorspace across the three authority areas.
- 10.4 GVA prepared the 'Norwich Sub-Region: Retail and Town Centres Study' in October 2007, the retail and town centres evidence base study which informed the policies and strategic approach to retail and town centre development set in the JCS. This study acts as an update to the 2007 Study and supersedes its findings in full.
- 10.5 The findings of this study have been supported by a wide range of research and data. In particular, a household telephone survey of shopping patterns was undertaken across the whole of the GNDP area, plus parts of adjacent authority areas in which residents are likely to look towards centres within the GNDP area for their retail and leisure needs. We refer to this area as the 'survey area'. The household telephone survey identified where residents are currently travelling to undertake their food and non-food shopping trips, as well as for their commercial leisure trips such as visits to pubs, restaurants, cafes, cinema, theatre, cultural venues and so on.
- 10.6 In addition, we have undertaken 'health check' assessments of key centres in the study area, assessing their vitality and viability against key indicators set out in the Government's Planning Practice Guidance (PPG), based on a combination of third-party data such as Experian Goad and the CoStar Commercial Property Database, and our own qualitative observations.
- 10.7 The centres for which this assessment has been undertaken were agreed with the GNDP at the outset of the study. They are **Norwich city centre** plus the 'large district centres' of **Anglia Square and Riverside** in Norwich; the 'Main Towns' of **Aylsham, Diss, Harleston and Wymondham**; and two 'large village' centres within South Norfolk District - **Loddon and Long Stratton**. The aforementioned household telephone survey asked respondents who visited the centres we have considered as part of our assessment what they liked and disliked about the centres, and how it was considered they could be improved.

- 10.8 The context within which this study has been prepared is considerably different to that of the 2007 Study. There is no doubt that the role of town centres has changed and evolved over the past decade, and town centres, particularly at the upper levels of the retail hierarchy, will need to change and adapt to wider market shifts and people's changes in shopping habits. Many comparison goods (non-food) retailers are now preferring to concentrate their activities in larger centres, leaving smaller centres to take on a more value/discount-orientated comparison goods function, as well as retaining and strengthening their convenience (food) goods and retail services offer.
- 10.9 Online shopping was an established shopping alternative at the time of the 2007 Study but is now a major factor in people's shopping patterns - there is no doubt that online shopping acts as tough competition for the high street, but it also presents opportunities for town centres to capitalise, by maximising opportunities arising from services such as 'click & collect'. Information from the household survey suggests that online shopping for comparison goods across the survey area is above national average levels, in some cases over double the national average, and we have factored this trend into our assessment of comparison goods retail capacity.
- 10.10 Therefore, town centre strategies which support the continued adaption and evolution of the traditional high street are now more important than ever. These strategies will need to recognise that whilst retail will continue to be the main driver of footfall in centres, there is a need to ensure that centres have a balanced mix which also include a complementary range of other 'main town centre' uses (as defined by the NPPF). Strategies may include providing a higher quality shopping 'experience' through investing in public spaces, shopfronts, markets and complementary 'meanwhile' uses; improving the mix of retail and non-retail outlets to increase the length of time people spend in a centre (and the amount they spend in a centre), with a particular focus on enhancing commercial leisure provision, and, where appropriate, evening economy uses to ensure a centre has a role and function at all times of the day.
- 10.11 The 'health check' assessments of Norwich city centre (summarised below) has identified that centre has a broad range of retail and other 'main town centre' uses which enables it to function well as both a daytime and evening destination, and consequently the centre benefits from what can be considered to be strong levels of vitality and viability. Riverside district centre has a particular strength as an evening economy/leisure destination which generally complements that of the rest of Norwich city centre. However the Main Towns and smaller centres which we have considered have a much more limited range of evening economy/non- retail uses in their centres.
- 10.12 Following on from this, in the **Combined Strategy Paper** the conclusions from this study are combined with those from the Employment Needs Study to provide a series of strategies for each of the study area centres, for the GNDDP to take forward into the preparation of the new GNLP.

Summary of performance of Norwich city centre & large district centres

Norwich city centre performance

- 10.13 Based on the findings of our health check assessment, published data and the outputs of the household telephone survey, it is clear that Norwich city centre continues to benefit from strong levels of vitality and viability, and the centre is successfully fulfilling its role and function as a major regional centre serving the shopping and leisure needs of an extensive catchment.
- 10.14 The diversity of uses in the city centre has remained broadly stable since the 2007 study. Whilst there have inevitably been changes in operators in the intervening period, there has not been a marked shift towards convenience and services which many smaller centres have seen. The offer of Norwich city centre continues to be led by comparison goods retail, which accounts for over 40% of all units in the city centre, almost 10 percentage points above the UK average. This trend is to be expected; Norwich city centre serves a region-wide shopping catchment area, as shown in the plan at Figure 8.1. The population of the study area shown in Figure 8.1 which we have used as the basis of our assessment extends to almost 875,000 persons, whilst data from CACI (2011) suggests that the city centre's shopper

catchment is as large as 1.1million people. Reflecting the 'polarisation' trends which this study has identified, Norwich is therefore a key centre which most comparison goods retailers are likely to seek representation in, on account of its extensive catchment area.

- 10.15 The vacancy rate in the city (Experian Goad boundary) is 8.8% (April 2016), below the current UK average of 11.2%, although from our own observations the vacancy rate appears to have subsequently reduced and there are very few vacancies within the prime retail areas. The above vacancy rate is likely to have been inflated on account of the ongoing works to remodel Castle Mall, which has resulted in a number of units being vacated in order to facilitate redevelopment works. There are prominent vacant units on St Stephen's Street on account of the closure of the large BHS store, as well as where Poundland have closed one of their two stores on the street.

Comparison goods retail

- 10.16 Comparison goods retailers are frequently drivers of footfall in a centre and therefore strong representation in this sector should be regarded as positive. The proportion of comparison goods uses in the city centre is virtually unchanged from the 2007 Study, when these uses accounted for 41.4% of uses. The findings of the household survey undertaken in support of the study confirm the importance of comparison goods shopping as a footfall driver in the city centre — 70% of respondents to the household survey who visit Norwich stated that comparison goods shopping was the main reason for visiting the city centre, and almost one-third of respondents stated that the city centre's good range of non-food shops was the attribute of the centre they liked the most. The survey results also found that 29% of respondents who visit the city centre for non-food shopping also visit a café, pub or restaurant; 10% visit another form of leisure venue; and 10% undertake food shopping, emphasising the need for the city centre to retain a broad range of supporting complementary uses.
- 10.17 The findings of the household telephone survey confirm that Norwich city centre contains to exert a dominant influence over comparison goods shopping across the majority of the survey area, accounting for almost £1 in every £2 spent on comparison goods shopping across the survey area. It achieves a market share of over 75% from two of the 15 survey zones (two of the three survey zones which cover the Norwich urban area), and a market share of over 50% from a further five survey zones. The city centre's market share from the Norwich urban area is generally strong but reduces from residents on the northern side of the city on account of competition from a number of retail parks, particularly Sweet Briar and Sprowston Retail Parks.

The city centre retail offer

- 10.18 The city centre is home to five department stores, including Jarrolds, an award-winning independent department store, as well as branches of national department store operators such as John Lewis, House of Fraser and Debenhams. The department stores are scattered around the city centre - stretching from Jarrolds as the gateway to the Norwich Lanes to Marks & Spencer on Rampant Horse Street and John Lewis to the south-east of the centre. This in its own right helps contribute to the definition of a retail circuit as these department stores act as 'anchor' stores to the wider retail offer.
- 10.19 Intu Chapelfield, on the southern edge of the city centre, has consolidated its position as the principal covered shopping centre in the city centre since the 2007 Study. Anchored by a House of Fraser department store, Intu Chapelfield is also home to a strong comparison goods-led fashion/lifestyle brand offer which also includes H&M, Zara, Apple, Hollister and River Island. An outdoor restaurant area adjacent to the Chantry Road entrance to the centre (Chapelfield Plain) has attracted a number of new operators to the city in recent years, such as Carluccio's, Byron and Wagamama. On nearby shopping streets are branches of other key footfall drivers such as Next, Marks & Spencer, Topshop/Topman and Primark, who are upsizing their representation in the city centre at the time of preparation of this study.

- 10.20 The older Castle Mall (opened 1993) has repositioned itself since the opening of Intu Chapelfield, and it now acts as a complementary 'secondary' shopping centre, offering neither the quality anchor stores nor the range of retailers which Intu Chapelfield presently does. Footfall in the centre is noticeably lower than Intu Chapelfield, although an extension to the centre which is currently under construction, which will create a new dining quarter and a redesigned entrance into the centre from Timberhill, will hopefully enable Castle Mall to make a more positive contribution to the overall offer of the centre.
- 10.21 Norwich Lanes continues to remain a hugely important asset to the city centre. The Lanes is the focus of the city centre's independent retail and leisure offer, with a healthy mixture of boutique retailers, cafes, delis, restaurants, mostly trading from small units. The mixture of uses is interesting and there is evidence that the quality of openings in the area in recent years has been towards the upmarket end, with a number of new high-end food & beverage openings particularly apparent. Venues such as the Norwich Arts Centre enhance the cultural offer of this part of the city centre.
- 10.22 The city centre does not contain any large-format foodstores, although large Sainsbury's and Morrisons stores (at Brazen Gate and Riverside respectively) are readily accessible from the city centre. However there are a range of smaller-format foodstores serving the city centre which enable 'top up' shopping needs to be met. These include a Tesco Metro store on Guildhall Street and a good-sized foodhall within the Marks & Spencer store on St Stephen's Street. There has been a slight increase in the proportion of units given over to convenience goods retail relative to the 2007 Study, possibly reflecting trends seen at the wider level with more smaller-format convenience stores opening in town and city centres; for example. Tesco, Sainsbury's and One Stop have all opened new smaller-format convenience stores or increased their representation in the city centre subsequent to the 2007 Study.

Large district centres performance

- 10.23 Abutting the city centre to the north and east are two 'large district centres' — Riverside and Anglia Square. **Riverside** district centre is an untypical district centre, centred around a large Morrisons supermarket, retail warehouse-format units and a popular commercial leisure offer which includes an Odeon IMAX cinema, bowling alley and several family dining restaurants. The comparison goods offer is entirely devoted overlaps to a significant extent with the city centre, with many retailers trading in both locations.
- 10.24 There are qualitative gaps in the offer for what we would expect a 'typical' district centre to contain, for example a complete absence of retail services such as hairdressers, beauty salons and banks for example. There are also no small-scale shops which enable day-to-day shopping needs to be met, with the size of retail units and national operator-led tenant mix meaning that the centre acts as more of a 'destination', a finding supported by the household survey results showing frequency of visits to the centre.
- 10.25 The leisure offer is strong, with the combination of Norwich's biggest cinema and a number of family dining restaurants, plus other factoring such as free parking, mean that visiting Riverside for leisure trips is likely to be an attractive proposition for many residents, although clearly the depth and range of offer is not comparable to that of the city centre.
- 10.26 **Anglia Square** district centre continues to function with generally satisfactory levels of vitality and viability, as was identified in the 2007 Study. The 1970s purpose built shopping centre is aesthetically unpleasing and performs a retail function which is little more than functional, but positively does benefit from some reasonably-sized units. The 'anchor' stores to the centre are relatively poor, although reflective of the offer of this part of the centre as a focus for discount/value retailing. Proposals for redevelopment of the centre are long-standing and should remain a priority for Norwich City Council over the new GNLP period.

- 10.27 Magdalen Street, which also forms part of the defined district centre, also continues to perform adequately in its northern half (adjacent to Anglia Square), where there is a need for improvements to the appearance of some of the units. Progressing along the southern portion of the street, the retail offer becomes more specialist/unique, and appears noticeably more upmarket. The presence of a number of restaurants in this part of the centre adds to the diversity of uses in the centre which is otherwise largely reliant on retail uses.
- 10.28 The main qualitative gap is the lack of consumer choice for food shopping, with shopping needs currently only being met by a small Iceland store. This was also identified as a constraint to the vitality and viability of the centre in the 2007 Study. The environmental quality of the centre is adequate, but enhances southwards along Magdalen Street. The imposing Shopping Centre with its under-used upper floors does not fit in with the surrounding and compromises the wider area's environmental quality.

Commercial leisure

- 10.29 The commercial leisure offer of the city centre (for example, cafes, restaurants, bars, clubs, cinemas, theatres, and hot food take-aways) also remains strong, accounting for just under one-quarter of all units in the centre, in line with national average levels. The city centre's leisure offer includes 70 restaurants, 54 cafes and 33 bars, and the proportions of these uses in the city centre are above their respective sub-category averages. We understand from the City Council that there have been a significant number of new café and restaurant openings in the city centre subsequent to the 2007 Study, with many of these openings coming at the expense of retail outlets. There are also 22 pubs in the city centre, accounting for 2.0% of total units in the city centre, slightly below the UK average. The figures above exclude the extensive commercial leisure provision at Riverside. There appears to be strong demand from the commercial leisure sector for representation in Norwich at present, with published requirements from a number of restaurant operators as well as hotel operator Travelodge.
- 10.30 The city centre has representation from two cinemas - a Vue cinema in Castle Mall and Picturehouse Cinema City on St Andrew's Street. There is a third cinema located in Anglia Square Shopping Centre, within the district centre. These provide a contrasting and complementary offer which means a wide range of potential audiences can be reached. However, the most popular cinema facility by some margin is the Odeon at Riverside district centre, which accounts for over 1 in 2 of all cinema visits across the survey area. The city centre also benefits from two theatres - the historic Theatre Royal and the smaller, contemporary Norwich Playhouse, which further add to the cultural offer of the city centre and make a positive contribution to its evening economy. There are also a number of live music venues in the city centre, although the most popular live music venue in the city - and the one which attracts the majority of high profile touring bands - is the University of East Anglia Students Union, located on the UEA campus outside the city centre.
- 10.31 Just under one-quarter of respondents from across the survey area visit 'family entertainment' venues such as bowling and staking. The majority of the market share in this respect is accounted for by the Hollywood Bowl facility at Riverside, and there are no facilities of this nature within the city centre itself, with other facilities located in purpose-built developments away from the city centre.

Convenience goods provision in the Norwich urban area

- 10.32 The Norwich urban area is well-covered for foodstores, and in each of the three survey zones which cover this area there are different supermarkets attracting the highest market shares, suggesting that residents' needs are being satisfactorily met at the local level and residents are not required to travel a significant distance for their convenience goods shopping. Foodstores in the Norwich urban area are, for the most part, trading well. Collectively, main/large-format foodstores in the city are 'over-trading' by approximately £63.5m, with Aldi stores at Sprowston Road, Larkman Lane and Plumstead Road district centres all trading noticeably strongly, along with Tesco stores at Sprowston and

Harford Bridge, and Sainsbury's at Longwater. A handful of stores are trading at below company average levels, including Sainsbury's at Thorpe St Andrew and Morrisons at Old Catton. There are a number of 'pipeline' permissions and undetermined applications for new foodstores, including additional stores for discount operators Aldi and Lidl.

Summary of performance of Main Towns and Large Villages

10.33 As part of our study we have also undertaken an assessment of the vitality and viability of the JCS-defined 'Main Towns' of Aylsham in Broadland District and Diss, Halesworth and Wymondham in South Norfolk District. We have also reviewed the performance of the two 'large villages' of Loddon and Long Stratton, although these centres only perform a limited shopping role and there is little in the way of published data to draw on to inform our assessments.

Aylsham

10.34 Aylsham is the only Main Town which falls within Broadland District. It is a small town centre - extending to just 84 units in total - and presently displays mostly positive signs of vitality and viability. The centre has both a good-sized Budgens and smaller Co-Op store which act as 'anchor' stores and there is a range of shopping and retail services which enable some local/day-to-day shopping needs to be met. It is evident that the vitality and viability of the centre is underpinned by its convenience shopping role. Vacancy levels have been consistently low over the past couple of years, with the current vacancy rate significantly below the UK average.

10.35 Aside from the national foodstore operators the majority of units are occupied by independent operators, which helps provide a diverse mix of uses and differentiate the town from larger, higher-order centres. However there is an under-provision of leisure services – such as café's, bars and restaurants – in the centre. Further uses of this nature would help support the retail function of the centre and encourage further 'linked trips' and longer dwell times within the centre.

10.36 The environmental quality of the centre is good, with the centre benefitting from a historic town centre environment, a good level of cleanliness, and no major issues of traffic congestion, although some respondents to the household survey suggested that the centre would benefit from more car parking provision.

10.37 Aylsham does not have a particularly strong comparison goods function, but nevertheless draws £11.1m of comparison goods spend from the survey area, virtually all of which comes from its 'local' survey zone, zone 8. The majority of residents the Aylsham area look towards destinations in Norwich for their comparison goods shopping. Whilst the town centre contains two smaller supermarkets (as noted above), food shopping patterns in the area are dominated by the Tesco foodstore on the outskirts of Aylsham, which accounts for over one-third of the market share for residents in this zone, and pointing to a lack of customer choice in this area. Reinforcing this further, 11.8% of residents in the Aylsham area are currently travelling to foodstores in North Walsham (Sainsbury's, Waitrose, Lidl) for their food shopping.

10.38 Aylsham has a limited role and function as a commercial leisure destination but its monthly film screenings at the Aylsham Picture House help make an important contribution to the cultural offer of the town, and this model could potentially be adopted by other market towns, subject to there being appropriate venues and sponsorship in place. There is a need for the centre to enhance and diversify its food and drink offer in order to enhance its diversity of uses and encourage longer dwell time.

Diss

10.39 Diss is situated within South Norfolk District, approximately 34km south of Norwich. The largest of the Main Towns, at 176 units, Diss can be considered to be displaying positive indicators of vitality and viability. The centre is home to Tesco, Morrisons and Aldi stores (the Aldi being located within the primary shopping area, and the Tesco and Morrisons in

edge-of-centre locations), as well as day to day national comparison goods multiples. The Tesco and Morrisons stores are detached from the primary shopping area but are sufficiently close to provide linked shopping trips if desired. The household survey confirmed that over half of all users of the centre visit for food shopping, and these facilities were observed to be the busiest areas of the centre at the time of our visit.

- 10.40 The Experian Goad survey identified that vacancy rates were below the UK average in December 2015 and subsequent to this, the vacancy rate in the centre has fallen further, suggesting positive levels of demand for units in the centre. Diss has very good environmental quality with areas around Diss Mere and the Market Place providing local amenity space. Overall, we would consider Diss to benefit from generally positive levels of vitality and viability and no obvious areas of concern were noted.
- 10.41 Diss has the highest comparison goods turnover of any of the South Norfolk Main Towns, drawing £78.1m of comparison goods spend from the survey area. Diss falls within zone 13 and the town centre accounts for 38.4% of the market share from this zone (with the majority of the remainder accounted for by Norwich). The centre sits alone in a fairly wide rural hinterland which is likely to contribute to this relatively high comparison goods turnover. The catchment of Diss does not, for the most part, extend beyond its 'local' zone.
- 10.42 As noted above, Diss is served by three supermarkets, all of a relatively good size, and this range means that food shopping patterns in the area are largely self-sufficient. The Aldi, Tesco and Morrisons stores in Diss account for over 70% of food shopping trips for residents in the Diss area; the most popular foodstore is the edge-of-centre Morrisons store, which accounts for one-third of all food shopping trips for residents in this zone.
- 10.43 In respect of its commercial leisure offer, it is positive to note that Diss town centre attracts over 75% of the market share from its local zone in respect of patterns of visits to cafes, suggesting that there is good provision of these facilities in the town centre. However the retention rate for evening dining uses is considerably lower, and this represents an opportunity for improvement moving forward.

Harleston

- 10.44 Harleston is a small, compact town centre (96 units) located in South Norfolk District, close to the Norfolk-Suffolk border, approximately 25km south-east of Norwich. Harleston's vitality and viability is mainly positive, with the centre anchored around the centrally-located Budgens store and its car park. It serves a role and function of meetings day to day local shopping and services needs. The majority of the offer in the centre comprises of independent operators, with the exception of national food retailers and financial and business services. The centre has a vacancy rate below the UK average and no major concentrations of vacant units were observed. The environmental quality of the centre is again positive, with attractive shop frontage and decorative flags conveying a village-like feel. There is scope for some other aspects of the public realm in the centre, such as provision/quality of seating, to be improved. The centre also suffers from poor accessibility by public transport.
- 10.45 Harleston town centre has a comparison goods turnover of £15.0m, again reflecting its relatively limited comparison goods offer, but it manages to attract 35.9% of comparison goods spending from its 'local' survey zone (zone 12) and we consider this to be a strong performance when considering the relatively limited retail offer in the town. Harleston's influence beyond this local catchment is limited however, owing to the presence of competing centres such as Diss, Halesworth and Beccles.
- 10.46 In terms of food shopping, the Budgens store in Harleston attracts a market share of 28.4% from zone 12; most of the remaining market share is captured by foodstores in nearby Diss where there is broader range of choice and larger-format supermarkets. Nearly half of the visitors to Harleston do so for food-shopping, and in common with the other

main towns it is apparent that the wider vitality and viability of the centre is supported by the presence of their foodstores.

Wymondham

- 10.47 Wymondham is a market town in South Norfolk District, located 14km south-west of Norwich. The centre is of a similar size to Aylsham and Harleston, extending to 135 units in total. As with the other Main Towns, the focus of the retail/services offer in the centre is orientated towards meeting day-to-day shopping and services needs. There are a number of antiques and other specialist shops in the centre, which contributes to the diversity of uses and helps provide a unique selling points to the centre. A key change to the retail offer in Wymondham since the 2007 Study is the opening of a Morrisons supermarket on the edge of Wymondham town centre; whilst not within the town centre itself it is within walking distance of the main retail offer.
- 10.48 The retail offer in the town centre is anchored by a small Co-Op store, which whilst only being of a size capable of meeting day-to-day/top-up shopping needs, is trading well. The majority of the retail offer in the town centre comprises of independent operators, which were observed to have a good level of footfall at the time of our visit to the centre. Some of the retail offer is more specialist in nature, which adds to the diversity of the offer. The presence of a small branch of Jarrolds Department Store is a positive addition to the town.
- 10.49 The centre has a low vacancy rate which has decreased in the last year. Wymondham benefits from a strong environmental quality and this attractive town centre environment makes an important contribution to the overall vitality and viability of the town centre. However a number of the shopfronts in the centre would benefit from their appearance being toned down to better reflect the historic character of the centre.
- 10.50 As we have across the other Main Towns, there is scope for enhancement of the food and beverage offer in the town centre to encourage the development of an early evening economy and extend the operational hours of the town centre. However such uses should not be promoted at the expense of undermining the core retail function of the centre.

Loddon

- 10.51 Loddon is a small centre — classified as a 'large village' — located within the South Norfolk District. The centre lies within the Norfolk Broads boundary and is approximately 16km to the south west of Norwich. The A146 travels around the edge of the town and is a main arterial road into the city, with regular bus services providing public transport facilities between the two centres.
- 10.52 Reflecting the small size of the centre, the focus of the retail offer in Loddon is on meeting day-to-day shopping needs, with Co-Op and Premier stores meeting top up food shopping needs. There is also a bakery and a butcher within the centre, and a branch of Barclays. All the remaining units are comprised of independent operators and the mix of uses is relatively broad for the size of the centre. Units are well maintained with tidy facades and advertisement that was consistent and in keeping with the village-like feel of the town. Positively, we did not observe any vacant units in the centre.
- 10.53 The Co-Op store which anchors the centre is noticeably small in size (under 100 sq.m) and therefore it is not able to meet anything other than limited top-up shopping needs. Accordingly many residents in the Loddon survey zone (zone 5) undertake their food shopping in destinations further afield, to stores in Beccles, as well as to the Tesco store on the southern edge of Norwich at Harford Bridge. We consider there be scope to improve the sustainability of convenience goods shopping patterns for residents in Loddon. Loddon only attracts £3.8m of comparison goods spend from the survey area, the lowest comparison goods turnover of any of the centres.

Long Stratton

- 10.54 Long Stratton is a linear centre located on the A140 between Norwich and Diss, and its location on this main thoroughfare affords it good levels of public transport connections to the two centres. The centre is again relatively small but has an important civic function as the headquarters of South Norfolk District Council. Whilst the centre's presence on the A140 has its benefits, such as good transport links and attraction of passing trade, it does also present the centre's greatest constraint: the active frontage that is located directly on the A140, although well-maintained, is stretched along the road and means the centre feels disconnected and traffic-dominated. All of the vacant units within the centre are located along the main road. Barclays have vacated their unit in the centre, leaving the centre with no other bank provision. The centre is anchored by a medium-sized Co-Op supermarket which is of a sufficient size that both top-up and some main food shopping needs can be catered for. The centre attracts a modest comparison goods turnover of £5.6m, reflecting its limited role and function as comparison goods shopping location.

Summary of comparison and convenience goods 'need'

- 10.55 In Section 8 of this report we set out the quantitative 'need' for new comparison and convenience goods floorspace which should be planned for over the period of the new GNLP to 2037. The projections of retail need are informed by the findings of the household telephone survey undertaken in support of this study, and assumes that these shopping patterns will remain unchanged over the duration of the GNLP period.
- 10.56 In identifying capacity, it is particularly important to note that forecasts are increasingly open to margins of error over time, and accordingly will need to be refreshed over the study period. For this reason, we advise that the identified forecasts of both comparison and convenience goods 'need' beyond 2027 should be considered indicative only.
- 10.57 The comparison goods need figures are presented for the Norwich urban area (which includes those parts of the Norwich urban area that fall within Broadland and South Norfolk), and then separately for Rural Broadland (which includes the Main Town of Aylsham) and Rural South Norfolk (which includes the Main Towns of Diss, Harleston and Wymondham, plus the 'large villages' of Loddon and Long Stratton. For each area, we have identified lower and upper need thresholds which the Greater Norwich authorities should plan for. A summary of the comparison goods need for each area is set out in **Table 10.1**. Forecasts include allowance for 'commitments' for a new retail floorspace to come forward and act as a 'claim' on expenditure.
- 10.58 The lower forecasts (blue-shaded in Table 10.1) assume that current levels of 'special forms of trading' (e.g. online shopping) will continue throughout the study period. Data from the household telephone survey shows that online shopping for comparison goods across the study area is above (for some survey zones quite significantly so) current UK average SFT forecasts provided by Experian. The lower forecasts therefore assume these above-average levels of SFT will continue, increasing in line with percentage point increases identified by Experian.
- 10.59 The upper forecasts (unshaded in Table 10.1) are based on UK average comparison goods SFT forecasts provided by Experian. The two forecasts combined therefore indicate the range of comparison goods floorspace which the Greater Norwich authorities should seek to plan for over the new GNLP period.

Table 10.1: Comparison goods floorspace 'need' by authority area (baseline and local SFT forecasts)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Norwich urban area 'baseline' comparison goods requirement [^]	-300	15,000	<i>31,200</i>	<i>53,700</i>
Norwich urban area 'local SFT' comparison goods requirement [^]	-1,800	11,100	<i>24,900</i>	<i>44,100</i>
Rural South Norfolk 'baseline' comparison goods requirement	800	2,800	<i>5,000</i>	<i>7,800</i>
Rural South Norfolk 'local SFT' comparison goods requirement	600	2,300	<i>4,100</i>	<i>6,500</i>
Rural Broadland 'baseline' comparison goods requirement	100	500	<i>1,000</i>	<i>1,600</i>
Rural Broadland 'local SFT' comparison goods requirement	100	400	<i>1,000</i>	<i>1,300</i>

Source: Table 7 and Table 10, Appendix I. [^]Figures for Norwich are for Norwich urban area, including those parts of Broadland and South Norfolk which form part of the Norwich urban area *Figures are indicative only and should be subject to further testing during the GNDP plan period.

10.60 To summarise, it is recommended that the following comparison goods needs are planned for to 2027, with longer-term forecasts to 2037 reviewed during the new GNLP period.

- **Norwich urban area: between 11,100 and 15,000 sq.m net comparison goods floorspace by 2027**
- **Rural South Norfolk: between 2,300 and 2,800 sq.m net comparison goods floorspace by 2027**
- **Rural Broadland: between 400 and 500 sq.m net comparison goods floorspace by 2027.**

10.61 The convenience goods need figures are again split between forecasts for the Norwich urban area and Rural Broadland / Rural South Norfolk. In order to assist the Greater Norwich authorities in ensuring that convenience goods shopping needs are adequately met at the local level, we have also disaggregated convenience goods needs between each of the Main Towns. This will help ensure that sustainable patterns of convenience goods shopping are supported and enhanced over the GNLP period. These findings should be considered alongside our qualitative assessments of provision in each of the Main Towns, as summarised above. The convenience goods need figures are summarised in **Table 10.2**; again figures beyond 2027 should be considered indicative only and subject to further review.

Table 10.2: Convenience goods floorspace 'need' by authority area (baseline forecasts)

	2022 (sq.m net)	2027 (sq.m net)	2032* (sq.m net)	2037* (sq.m net)
Norwich urban area convenience goods requirement	-3,900	-3,300	-2,600	-300
South Norfolk Main Towns / Rural Area convenience goods requirement	3,400	3,700	4,000	5,100
Of which, Diss	2,300	2,500	2,600	3,100
Of which, Harleston	-300	-300	-300	-200
Of which, Wymondham	200	300	400	800
Of which, Rural Centres / Other	1,200	1,200	1,300	1,400
Broadland Main Towns / Rural Area convenience goods requirement	700	800	800	1,000
Of which, Aylsham	-100	-100	-100	0
Of which, Rural Centres / Other	900	900	900	1,000

Source: Tables 8-10c, Appendix II *indicative only, should be subject to review

Commercial leisure needs

- 10.62 Reflecting the fact that a greater proportion of disposable income is now spent on commercial leisure activities, Experian forecast that positive expenditure growth is expected to come forward in each of the key commercial leisure categories over the course of the new GNL period. The majority of the leisure expenditure growth which is expected to come forward is in the 'restaurants and cafes' sector, which also includes spending growth in pubs and bars.
- 10.63 Our assessment has set out how these uses already play an important role in contributing to the vitality and viability of Norwich city centre, but that some of the Main Towns are underprovided for, particularly in respect of evening restaurant/dining options. Further growth in Norwich City Centre should be supported as this study has demonstrated that these uses are an important secondary reason for visiting the centre (behind comparison goods shopping). Enhancement of the food/drink sector should also be an aspiration for each of the Main Towns, in order to help stimulate a stronger evening economy. Across centres at all levels in the hierarchy a particular focus should be on the enhancement of the 'early evening' economy, i.e. places that offer dining options that trade during retail hours but extend to bridge the gap between when retail outlets close and night-time economy venues (bars (and nightclubs in the case of Norwich city centre) become busy).
- 10.64 Growth in cultural services expenditure is more limited in comparison; however, there may be scope to support the enhancement of cultural services in some centres. The small size of many of the centres and the relatively limited populations in their hinterlands may limit their attraction to the market for many types of cultural services, as facilities such as cinemas, theatres and so on generally require extensive, fairly densely populated catchments to be successful. However larger Main Towns may be able to support small-scale 1 or 2-screen cinema developments for example, particularly if allied to an enhancement of the wider evening economy offer. Applications for

enhancements of provision of this nature should, it is recommended, be considered on their individual merits but generally supported.

- 10.65 As a general rule, provision of new commercial leisure facilities should be centrally located within existing town centres where possible, in order to support the development of complementary uses and enhance the wider vitality and viability of the centre in question.

NPPF Terms

- * **Edge of centre:** For retail purposes, a location that is well connected and up to 300 metres of the primary shopping area. For all other main town centre uses, a location within 300 metres of a town centre boundary. For office development, this includes locations outside the town centre but within 500 metres of a public transport interchange. In determining whether a site falls within the definition of edge of centre, account should be taken of local circumstances.
- * **Main town centre uses:** Retail development (including warehouse clubs and factory outlet centres); leisure, entertainment facilities the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres, and bingo halls); offices; and arts, culture and tourism development (including theatres, museums, galleries and concert halls, hotels and conference facilities).
- * **Out of centre:** A location which is not in or on the edge of a centre but not necessarily outside the urban area.
- * **Out of town:** A location out of centre that is outside the existing urban area.
- * **Primary shopping area:** Defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).
- * **Primary and secondary frontages:** Primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.
- * **Town centre:** Area defined on the local authority's proposal map, including the primary shopping area and areas predominantly occupied by main town centre uses within or adjacent to the primary shopping area. References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance. Unless they are identified as centres in Local Plans, existing out-of-centre developments, comprising or including main town centre uses, do not constitute town centres.

Technical Terms

- * **Benchmark turnover:** The expected turnover of existing retail facilities based on sales floorspace and expected average sales densities.
- * **Catchment area:** this is an area where a centre or store attracts most of its trade.
- * **Claw back:** this is a catchment area's expenditure that is currently spent outside a catchment, but is encouraged to be spent within a catchment through the development of new floorspace.
- * **Comparison goods:** Refers to non-food shopping – including fashion, home furnishings, electrical items, DIY goods, books and music 'Service' uses refer to commercial leisure services such as restaurants and cafes, as well as retail services such as hairdressers, beauty salons, banks, building societies and estate agents. Non-retail uses such as cinemas and arts centres are not included in Experian Good's analysis, but are accounted for qualitatively through our own analysis.
- * **Comparison spending:** expenditure (including VAT as applicable) on goods in COICOP categories: clothing materials & garments, shoes & other footwear, materials for maintenance & repair of dwellings, furniture & furnishings; carpets and other floor coverings, household textiles, major household appliances, whether electric or not, small electric household appliances, tools and miscellaneous accessories, glassware, tableware and household utensils, medical goods and other pharmaceutical products, therapeutic appliances and equipment, bicycles, recording media, games, toys and hobbies; sport and camping equipment, musical instruments, gardens, plants and flowers, pets and related products, books and stationery, audio-visual, photographic and information processing equipment, appliances for personal care, jewellery, watches and clocks, other personal effects.
- * **Convenience goods:** Refers to food shopping – including supermarkets, and specialist stores such as bakers, greengrocers, off licences and so on.

- * **Convenience spending:** expenditure (including VAT as applicable) on goods in COICOP categories: food and non-alcoholic beverages, tobacco, alcoholic beverages (off-trade), newspapers and periodicals, non-durable household goods.
- * **Expenditure forecasts:** assessments of future expenditure based on applying stated growth rates, based on information provided by data providers such as Experian.
- * **Expenditure projections:** estimates of future expenditure obtained by projecting past trends in expenditure by means of recognised statistical extrapolation technique.
- * **Gross floorspace:** Total external floorspace including exterior walls.
- * **Forecast year(s)/internal year(s):** these are in the year(s) when growth is forecast.
- * **Independent retailers:** Single-store or limited store retailers (typically with a maximum of nine outlets)
- * **Inflow:** this is expenditure generated from beyond a study area/catchment area that is spent in centres/stores within the study area/catchment area.
- * **Linked trip:** combining a visit to a supermarket or other use with a trip to use other shops and services in a nearby town/district/local/village centre.
- * **Leakage:** expenditure within a study area/catchment area that is spent outside the study area/catchment area.
- * **Market share:** the proportion of study area/catchment area's expenditure spent in a centre or store, expressed as a percentage.
- * **Multiple retailers:** National or regional 'chain store' retailers.
- * **Net floorspace:** Retail floorspace devoted to the sale of goods, excluding storage space (i.e. the trading area).
- * **Overtrading:** the amount of turnover in excess of a company or expected benchmark turnover.
- * **Per capita expenditure:** amount of money per annum spent on a category of goods by one person per year.
- * **Per capita expenditure growth per annum:** annualised real growth in spending (using constant prices).
- * **Qualitative need:** floorspace required to improve the provision and distribution of shopping and leisure services to improve choice, meet the needs of the community and promote the vitality and viability of town centres.
- * **Quantitative need:** floorspace required to support the projected expenditure growth over the plan period.
- * **Sales density:** the turnover per sqm of net floorspace achieved by retail floorspace.
- * **Sales density growth:** the annualised percentage of growth in turnover of existing floorspace.
- * **Special forms of trading (SFT):** Non-store based retail spending, including via the internet, mail order, markets and telephone sales. The majority of special forms of trading is accounted for by online shopping.
- * **Study area:** this is the area where a study of shopping patterns is based upon; it is normally divided into zones.
- * **Turnover efficiency:** An allowance for a retailer's ability to improve their turnover efficiency of sales density and the potential for existing floorspace to increase its productivity in the future, meaning that retailers increase their turnover to floorspace ratio.
- * **Under trading:** the amount of turnover below a company 'benchmark' turnover.