

Norwich Sub Region: Retail and Town Centres Study

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GLOSSARY OF TERMS

Sales Density	The average turnover per square meter. Company average sales densities are published by Mintel's 'Retail Rankings'
Class A1	Commercial units classed as retail or shop uses within the Use Classes Order.
Class A2	Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.
Class A3/A4/A5	Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.
Convenience Goods	Everyday items for which consumers are unlikely to travel far to make purchases. These comprise food, drink, newspapers and cleaning products.
Comparison Goods	Durable goods such as clothing, household goods, furniture, DIY and electrical goods (ie any product that is not classed as convenience).
Experian	A data consultancy who are widely used for retail planning information.
Financial Services	<i>Class A2</i> within the Use Classes Order such as banks and building societies.
Floorspace efficiency	The increase in <i>sales density</i> per square meter.
Focus	A published source of information providing known retail and leisure operator's space requirements.
Goad Plans	Town centre plans prepared by Experian, which are based on occupier surveys of over 1,200 town centres across the country.
Gross floorspace	Total external floorspace including exterior walls.
Market share	The proportion of consumers within a given area using a particular town centre or shopping facility.
Multiple traders	A retailer that is part of a network of nine or more outlets.
Net floorspace	Retail floorspace devoted to the sale of goods, excluding storage space.
Personal Services	<i>Class A1</i> Non-retail uses, such as hairdressers and beauty salons.
Special Forms of Trading	Non store retail sales such as catalogues, internet (e-tailing) and vending machines.
Study Area	The three local authority areas of Norwich, South Norfolk and Broadland
Survey Area	The coverage of the Household Telephone Survey Zones 1 – 30 as illustrated on Plan 1.
Qualitative	The characteristics of something being observed and described, rather than exact numerical measurement.
Quantitative	Involving the measurement of quantity or amount expressed in numerical values.
Zone A Rent	The annual rental charge for the first 20 foot depth of a shop unit

1. INTRODUCTION

- 1.1 GVA Grimley LLP was instructed by Norwich City, Broadland District and South Norfolk District Councils, together with Norfolk County Council, (hereafter referred to as the 'client team') to carry out a study to inform retail planning in the Norwich sub-Region in accordance with guidance set out in Planning Policy Statement 6 (PPS6): *Planning for Town Centres*.
- 1.2 This study provides robust and sound baseline evidence to inform the preparation of a Joint Core Strategy for the three local authority areas as part of the forthcoming Local Development Framework (LDF). It will cover both the strategic role of Norwich as a major regional centre and the more local issues facing the main centres in Broadland and South Norfolk Districts. The Study Area is identified on Plan 2.
- 1.3 Based on our research, analysis and overall findings, the strategic study identifies the performance of centres and the quantitative and qualitative need for new retail (comparison and convenience goods) and commercial leisure floorspace up to 2011, 2016 and 2021. However, we advise that forecasts beyond a five-year period (i.e. post-2011) should be interpreted with caution. We therefore recommend that the assessments be continuously monitored and updated to take account of changes in retail, leisure and property market trends, as well as revised spend and population growth projections.

Key Aims and Objectives

- 1.4 The key aims and objectives of this study, as set out in the client teams' Brief, are to provide an assessment of the need and potential for new town centre floorspace over the LDF period, taking into account both qualitative and quantitative considerations. Our assessment will specifically provide an estimate of the scale and nature of any changes in the position of town centres that may arise in the light of:
- Potential increases in population;
 - Forecast changes in retail expenditure;
 - Changing forms of retail and leisure provision; and
 - Possible increases or decreases in the trade draw from competing centres.

- 1.5 Other key aims include:
- The preparation of health checks to assess the vitality and viability of the city centre and the other main town centres;
 - The creation of a baseline for the future monitoring of the economic health, performance and requirements of the main centres;
 - An assessment of the physical capacity of centres to accommodate the forecast capacity for new floorspace, including advice on the provision of opportunity sites and any interventions required to bring them forward;
 - Advice on how to enhance the vitality and viability of the city centre and each of the main town centres; and
 - A review of existing definitions and allocations in retail policies.
- 1.6 This Study forms the baseline position, and will underpin future work elements including policy formulation, town centre strategies and the identification of potential development opportunity sites.

Approach

- 1.7 Our approach draws on the draft recommendations of our Good Practice Guidance for the DCLG on how to assess the need for, and impact of, key town centre uses. Our quantitative assessment is based on a transparent step-by-step approach, where the key stages of the analysis, as well as the data inputs and assumptions, are clearly set out and justified.
- 1.8 Our approach is also underpinned by bespoke household telephone interview and in-centre surveys, specifically commissioned as part of this study.
- The **telephone survey** was carried out between 2nd - 20th January 2007 and respondents were contacted during the day, in the evening and at the weekend in order to obtain a representative sample from the defined survey zones (see Plan 1). The full results of the household survey are set out in a separate volume to this study.
 - The **in-centre surveys** were undertaken between 29th January and 24th February 2007 on both weekdays and weekends, and the detailed tabulations are set out in Appendix 6 for Norwich City and Appendix 7 for the other towns and district centres surveyed in the sub-region.

- 1.9 The surveys provide a robust and sound evidence base to help establish current shopping patterns, town centre catchments and market shares of retailing (comparison and convenience goods) and leisure trips and spend. We consider that both the household and in-centre survey results should broadly reflect 'average' year-round shopping patterns across the sub-region. They should not be impacted by the Christmas or January sales period, which can often overstate the market share and trade draw of larger shopping locations. This is because the respondents to the household survey were asked where they do "most" of their shopping for different types of retail goods, rather than where they "last" shopped, and the in-centre surveys were largely conducted outside of the January sales period.

Report Structure

- 1.10 This report draws together the results of our research, incorporating the findings of the detailed survey-based technical analysis and health check assessments. The report is structured as follows:-
- **Section 2** summarises the national and regional policy framework which provides the policy context for the study.
 - **Section 3** summarises the key components of each authority's local policy framework, including the current retail hierarchy definitions.
 - **Section 4** considers the current market context and specifically the key socio-economic trends which are likely to influence the evolution of the Norwich Sub-region.
 - **Section 5** highlights shopping patterns across the Norwich sub-region and the potential impact of competing centres on the sub-region and the main study centres.
 - **Sections 6 – 10** assess the role, attraction and performance of the main study centres in each local authority area. We summarise their retail/leisure composition and the function they play. We also identify out of centre retail warehouse and foodstore provision.
 - **Section 11** reviews the leisure sector, providing a qualitative assessment of existing provision and the need for additional facilities through quantitative forecasts and an analysis of survey results and current travel patterns.
 - **Section 12** sets out our baseline economic capacity projections for the sub-region, focusing in particular on the capacity for further retail floorspace, having regard to identified commitments and growth scenarios.

- Finally, **Section 13** sets out our overall conclusions and recommendations. We also provide a headline assessment of potential opportunity sites that could potentially accommodate any identified retail floorspace need.

1.11 The evidence base to support our main findings and recommendations is set out in a series of plans and appendices. It is important to note at the outset that the spatial framework for our assessment is based on geographic areas (agreed with the client team) rather than local authority boundaries. It was agreed that, as part of the preparation of a Joint Core Strategy, this spatial framework best reflected the sub-region's shopping provision, shopping patterns and catchment areas. As Plan 2 shows, we have identified the following three main areas for our analysis:

- 'Norwich Urban Area';
- 'Rural South Norfolk'; and
- 'Rural Broadland'.

1.12 The more detailed breakdown of the main centres, shopping locations and floorspace in these three areas is set out in Appendix 8 (Tables 12-13) for comparison goods and Appendix 9 (Tables 32-34) for convenience goods retailing.

2. NATIONAL & REGIONAL PLANNING POLICY CONTEXT

2.1 In this section, we examine the relevant national and regional planning policy guidance relating to retail and town centre uses. The main policy documents reviewed are PPS6, the Regional Spatial Strategy (RSS) for the East of England and the Norfolk Structure Plan.

PPS6: Planning for Town Centres (March 2005)

2.2 PPS6 covers town centres and the main town centre uses. It sets out The Government's two key objectives to promote the vitality and viability of town centres. First, by planning for the growth and development of existing centres. Second, by promoting and enhancing existing centres, by focusing development in such centres and encouraging a wide range of services in a high quality sustainable environment, accessible to all.

2.3 PPS6 states that local planning authorities should actively plan for growth and change in town centres over the period of their development plan documents by:

- Selecting appropriate existing centres to accommodate the identified need for growth.
- Managing the role and function of existing centres by, for example, promoting and developing a specialist or new role and encouraging specific types of uses in some centres; and
- Planning for new centres of an appropriate scale in areas of significant growth, or where there are deficiencies in the existing network of centres.

2.4 Where possible the guidance states that growth should be accommodated by the more efficient use of land and buildings within existing centres. Opportunities should be identified for development, redevelopment, conversions and/or changes of use. Where growth cannot be accommodated in identified existing centres, local planning authorities should plan for the extension of the primary shopping area if there is a need for additional retail provision or, where appropriate, plan for the extension of town centres to accommodate other main town centre uses.

2.5 PPS6 states that in planning for growth in town centres, local planning authorities should allocate sufficient sites to meet the identified need for at least the first five years from the adoption of their development plan documents, although for large town centre schemes a longer period may be appropriate to allow for site assembly. Local planning authorities should consider the scope for site assembly using their Compulsory Purchase Order (CPO) Powers, to ensure that suitable

sites within or on the edge-of-centres are brought forward for development, including sites that are under-utilised, such as car parks and single storey buildings, which could be redeveloped for multi-storey, mixed use development.

- 2.6 Where existing centres are in decline, PPS6 states that local planning authorities should assess the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promote the diversification of uses and improve the environment. Where reversing decline is not possible, local planning authorities should recognise that these centres may need to be reclassified at a lower level within the hierarchy of centres.
- 2.7 The statement clarifies that the key tests of need, scale, impact, sequential approach and accessibility, apply equally to new development, renewal of extant consents, variation of planning conditions and changes of use. In the context of development control, all applicants are required to demonstrate appropriate scale and accessibility. The following provides a brief overview of the key tests:

(i) Need Assessment

- 2.8 It is not necessary to demonstrate the need for retail proposals within the primary shopping area of a town centre. This is designed to ensure that planning constraints on town centre schemes are less onerous. In reality, a need assessment is likely to be required on larger schemes to enable an informed judgement in relation to the scale and impact of development. Need must be demonstrated for any application for a main town centre use, including retail, which would be in an edge-of-centre or out-of-centre location.

(ii) Sequential Assessment

- 2.9 In terms of the sequential approach, site selection should be applied to all development proposals for sites that are not in existing centres, nor allocated in up-to-date development plan documents with the exception of proposals to extend individual stores by less than 200 sqm gross. The sequential approach requires that locations are considered in the following order:
- Existing centres, then;
 - Edge-of-centre locations, and finally;
 - Out-of-centre sites.

(iii) Impact Assessment

- 2.10 PPS6 states that impact assessments should always be undertaken for applications in edge-of-centre and out-of-centre locations, which are not in accordance with a Development Plan strategy. Where an application for a significant development in a centre, not in accordance with the development plan strategy, and which would substantially increase the attraction of a centre and could have an impact on other centres, the impact on other centres will also need to be assessed.

(iv) Scale of Development

- 2.11 In terms of the appropriate scale of development, local planning authorities should ensure that the development opportunities identified are directly related to the role and function of the centre and its catchment. The aim should be to locate the appropriate type and scale of development in the right type of centre, to ensure that it fits into that centre and that it complements its role and function in the retail hierarchy.

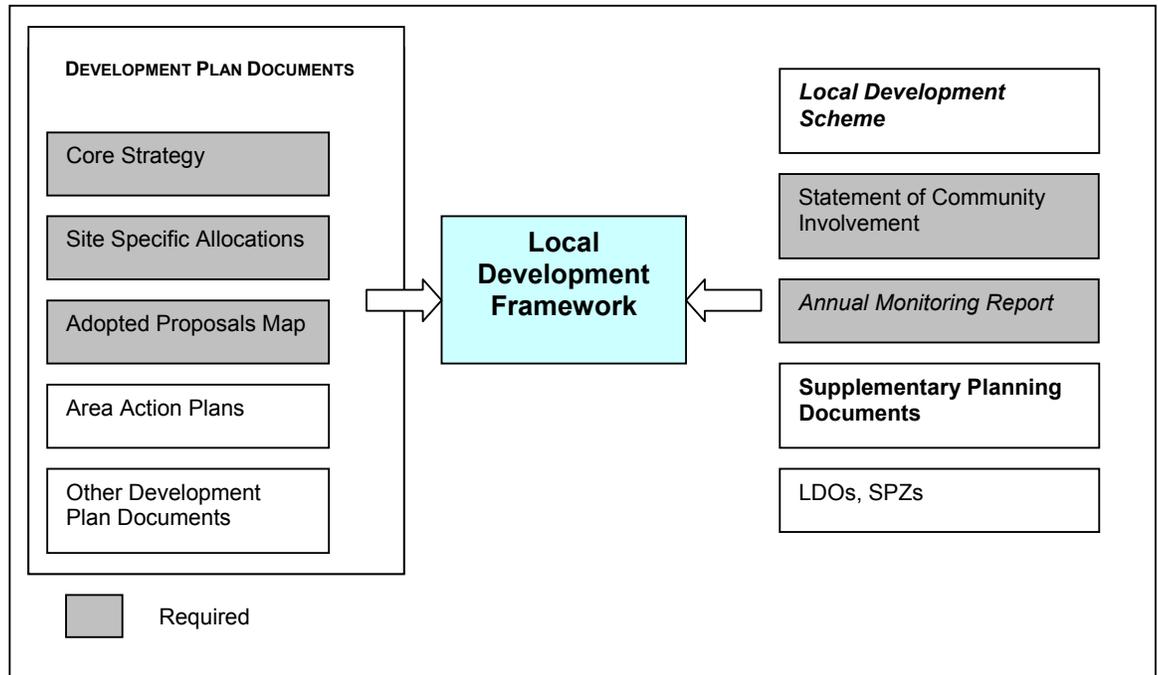
(v) Accessibility

- 2.12 One of the Government's main objectives is to reduce the need to travel; increase the use of public transport, walking and cycling; and reduce the reliance on the private car. The aim is to promote multi-purpose journeys and ensure that everyone has access to a range of facilities. Jobs, shopping, leisure and tourist facilities and a wide range of services should therefore be located in town centres wherever possible and appropriate, taking full advantage of accessibility by public transport.

PPS12: Local Development Frameworks

- 2.13 PPS12 sets out the Government's policy on the preparation of Local Development Documents (LDDs) as part of the Local Development Framework (LDF) process. The LDF, together with the regional spatial strategy (RSS), provides the essential framework for planning in the local authority's area. The new system was outlined in the Government's policy statements on planning reform in July 2002 '*Sustainable Communities - Delivering through Planning*' and became law following the introduction of the Planning and Compulsory Purchase Act 2004.
- 2.14 Planning Policy Statement 12 and the companion guide 'Creating Local Development Frameworks: A companion guide to PPS 12 sets out the requirements under the Act and provides guidance on how to prepare LDFs.

2.15 The key documents, which form part of the local development framework, are illustrated in the diagram below.



2.16 The documents that comprise the LDF system are summarised in Table 2.1 below.

Table 2.1 Summary of LDF documents

LDF Document	Summary of Purpose / Content
Core Strategy	Sets out the key elements of the planning framework for the area. Once adopted, all other DPDs must be in conformity with it. The Core Strategy should normally be the first DPD to be produced, except where the local planning authority has 'saved' policies and where the priority in the LDS is the preparation of an Area Action Plan or other DPD. It should comprise the Council's spatial vision, strategic objectives, spatial strategy, core policies, monitoring and implementation framework. It should seek to integrate the spatial aspects of other strategies such as the Community Strategy, Housing, Economic Development and Transport Strategies. It should contain policies which relate to the whole of the authority or locations within it (but should not identify sites).
Site Specific Allocations	Sets out the allocation of specific sites and policies relating to their release in each local authority area, including sites to meet retail and town centre needs.
Proposals Map	To identify areas of protection and illustrate sites for particular uses/developments. Map must be revised as new development plan documents are adopted (such as AAPs).

Area Action Plans (AAPs)	Where needed, the LDF should also comprise the preparation of AAPs to provide the planning framework for areas where significant change or conservation is needed. A key feature will be to focus on implementation, providing an important mechanism for ensuring development of an appropriate scale, mix and quality for key areas of opportunity, change or conservation. AAPs with a geographic or spatial dimension will benefit from having development plan status, in contrast to their previous status as supplementary planning guidance. They should be prepared to deliver planned growth areas; stimulate regeneration; protect areas particularly sensitive to change; resolve conflicting objectives in areas subject to development pressures; or focus the delivery of area based regeneration initiatives.
Development Control Policies DPD	Generic development control policies to set out the criteria against which planning applications should be judged may form part of the core strategy or form a separate development plan document. Emphasis is on policies which will not go out of date quickly and succinct justifications.
Local Development Scheme (LDS)	The programme for the production of development plan documents. Should provide a description of documents, their relations to one another and timescales for production. Should focus on the first three years from the date of preparation of the LDS but indicate future work.
Statement of Community Involvement (SCI)	Sets out how communities will be involved in LDF process and consulted on planning applications. Should set out the mechanisms for community involvement and resources required. Will be subject to independent examination.
Supplementary Planning Documents (SPDs)	The purpose of SPD is to expand on policies in a development plan document (or saved policy in a development plan). It may be site or subject specific. Part of the LDF and should be subject to community involvement, but not part of the 'development plan' or subject to independent examination. .
LDOs/SPZs	Details of any Local Development Orders or Simplified Planning Zones should also form part of the LDF.

PPG13: Transport, March 2001

- 2.17 PPG13 reaffirms the Government's policy position towards retail development, as outlined in PPS6. In particular, paragraph 35 of the guidance endorses the need to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments.
- 2.18 Furthermore, it reaffirms the Government's requirements for retail development to adopt a sequential approach, with preference given to town centre sites, followed by edge of centre and, only then, out-of-centre sites in locations which are (or will be) well served by public transport.

- 2.19 PPG13 notes that if there is a clearly established need for development, and it cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments, provided that improvements to public transport can be negotiated.
- 2.20 PPG13 requires that development plans set maximum levels for parking. The guidance makes it clear that there should be no minimum standards for development, other than for parking for the disabled.

Other Relevant National Guidance

- 2.21 The following sets out other relevant national guidance relating to retail planning and town centre issues.

(i) Planning Control of Mezzanine and Internal Floorspace

- 2.22 The creation of additional floorspace within buildings was brought under control in May 2006 following consultation on the ODPM's report: *'Planning Control of Mezzanine and Other Internal Floorspace Additions'* (March 2005). This was in response to concerns that the development of mezzanine floors in large retail stores significantly increased the available floorspace, thereby undermining the objectives of planning policy for the regeneration of town centres. The provision incorporated within the 2004 Act does not seek to prevent such development, but to allow authorities to determine such proposals in the same way they would for external store expansion.

(ii) Use Classes Order 2005

- 2.23 The changes to the Use Classes Order (UCO) took effect on 21st April 2005. The reforms are limited to the 'A' (retail) Use Class and to Nightclubs. Only restaurants and cafés will retain their A3 classification, with a permitted change to A1 or A2 Use Classes, but with all other changes of use requiring planning permission. Under the reforms, pubs and bars are reclassified under a new and separate use Class A4, with a permitted change to A1, A2 or A3 Use Classes, with all other changes requiring planning permission.
- 2.24 Takeaways have been reclassified under a new and separate Use Class A5, with a permitted change to A1, A2 or A3 Use Classes, with all other changes requiring planning permission. Nightclubs have been classified as sui generis and are excluded from the Use Classes. This brings nightclubs under specific and separate planning control. Planning permission will be required for any change of use to or from nightclub use.

- 2.25 The changes are intended to give local authorities more control to manage town centre development, while minimising the negative impacts of a proliferation of pubs, takeaways and night clubs.
- 2.26 In addition to these changes further amendments include the reclassification of Internet cafes as an A1 use, Retail Warehouse Clubs are re-affirmed as sui generis use (i.e. constituting a class of its own), and motor vehicle showrooms no longer enjoy permitted development rights to change to A1. The Government decided not to amalgamate the A1 and A2 classifications, a move which was suggested in the 2002 draft reforms.

Regional Spatial Strategy (RSS): East of England

- 2.27 Regional policy for the Norwich region is set out in the Draft East of England Plan (December 2004). The RSS has recently been subject of an Examination in Public and the panel report was published in June 2006. Proposed changes to the draft plan were published in December 2006 and were open to public consultation until March 2007.
- 2.28 The proposed changes to the draft plan recommend the deletion of the Norwich sub-region, instead describing it as a Key Centre for Development and Change (KCDC). Norwich is also identified as a New Growth Point (areas that provide opportunities to provide sustainable growth).
- 2.29 The proposed changes state that the main strategy is to concentrate development at the region's cities and other significant urban areas including selected market towns. These provide key focal points for transport, retailing, other commercial activities, administration, culture and tourism. Cities and other urban areas also provide direct access and interchange between a variety of public transport modes to a range of destinations, and are a focus for improving the interchange facilities required to strengthen public transport networks.
- 2.30 Norwich is one of 21 Key Centres for Development and Change. Policy SS3 states that the Network of Key Centres reflects the polycentric nature of the East of England with small and medium sized towns surrounded by large rural areas. The policy notes that development will be concentrated at these locations to benefit from existing infrastructure. It is noted that local authorities should work together where key centres adjoin or cross local authority boundaries.
- 2.31 Policy SS6 specifically relates to town centres. It states that thriving, vibrant and attractive town centres are fundamental to the sustainable development of the East of England and should be the focus for investment, environmental enhancement and regeneration. LDDs, supported by transport plans, economic, environmental and cultural strategies, should:

- Define the role (or redefine if necessary) of each city or town centre and include a strategy to promote a healthy mix of uses.
 - Manage change and build upon positive elements of its distinctive character and support the development and consolidation of local cultural heritage;
 - Ensure that land is allocated or can be made available to meet the full range of the city or town centre's identified needs; and
 - Protect and enhance existing neighbourhood centres and, where a need is established, promote new provision of an appropriate scale and function to meet local day to day needs.
- 2.32 In relation to retail development, Policy E5 sets out a hierarchy of cities and towns of strategic importance for retail and other town centre purposes. Norwich is defined as a Regional Centre. The policy states that major new retail development and complementary town centre uses should primarily be located in the centres identified in the hierarchy and be consistent with the size and character of the centres and their roles in the regional structure.
- 2.33 Local development documents should only propose higher order provision where need is clearly established and the development would:
- result in a more sustainable pattern of development and movement, including a reduction in the need to travel;
 - have no significant harmful impact on other centres or the transport network; and
 - Any new regional centres will be subject to similar considerations, and will be brought forward only as part of their review of this RSS.
- 2.34 Policy E6 notes that no need has been identified for additional out-of-centre regional/sub-regional shopping centres, or for the extension of retailing at such centres during the plan period.

Norfolk County Structure Plan (1999)

- 2.35 The Norfolk Structure Plan supports the provision of appropriate new provision within, or adjacent to, town centres in the retail hierarchy.
- 2.36 **Policy TCR 2** states that retail and leisure development will be consistent in scale and location with the hierarchy of centres and their function, with town centres being the preferred location. The plan notes that this policy is not intended to prevent development that would enhance a centre's vitality and viability.

- 2.37 The plan recognises the role of Norwich's extensive catchment and its regional role, providing a range of services as well as being the administrative and operational headquarters and an important historic city centre.
- 2.38 The Norwich Policy Area is an area beyond the built-up area of Norwich encompassing the market towns of Wymondham and Long Stratton, and the plan aims to keep growth as close to the city of Norwich as possible. In the Norwich policy area, the plan (Policy N11) states that provision for new non-food retailing will only be made in or adjacent to Norwich city centre.

Summary

- 2.39 The thrust of national and regional policy is to maintain and enhance the vitality and viability of existing town centres. New development and investment for retail, leisure and other town centre uses should be directed to town centres first, in accordance with the sequential test.
- 2.40 Local planning authorities are required to take a more proactive approach to the identification and allocation of sites as part of the LDF process. Where suitable and viable sites are not available in town centres, then local planning authorities are required to assess the potential for expansion of their main centres. In certain cases, local planning authorities may also have to manage decline and change in centres which can no longer realistically maintain their place in the retail hierarchy.
- 2.41 At the regional level, Norwich City is identified as a major regional centre, and all major new development and investment should be directed to the city centre first. The role of Norwich as a retail, leisure, cultural and education centre is promoted, with particular emphasis on developing the role of the city centre in order that it can continue to compete. The plan also supports the enhancement of other town centres in the sub-region. The important role of the smaller market towns and villages is also recognised.

3. LOCAL PLANNING POLICY CONTEXT

- 3.1 This section sets out the policy context at a local level and highlights the key points of relevance from the City of Norwich Replacement Local Plan, the Broadland District Local Plan and the South Norfolk Local Plan.

City of Norwich Replacement Local Plan

- 3.2 The City of Norwich Replacement Local Plan was adopted in November 2004.
- 3.3 The retail hierarchy comprises Norwich city centre, Anglia Square (which is defined as a large district centre), seven district centres and various local centres. The plan states that the development must be consistent with the scale of the centre unless the development fills an identified gap or, if on the edge or outside a centre, it shows that there is a need for the development.
- 3.4 The local plan notes that there are sufficient large foodstores to meet the needs of the city's population. However, allowance is made for the development of smaller foodstores (up to 1,200 sqm net) in district centres subject to a range of criteria.
- 3.5 The plan defines an edge-of-centre site as being within reasonable walking distance of the identified shopping area provided there are good, safe pedestrian routes between it and the centre, with uses which provide a suitable attraction on the route.
- 3.6 **Policy SH01** states that major non-food retail development will only be allowed where it is identified in policy, or where it can be shown that the additional floorspace cannot be accommodated within the existing provision.
- 3.7 In order to control the mix of uses in Norwich, the plan sets out policies for non-retail uses as follows:
- **Primary Retail Area** – proportion of A1 uses at ground floor level does not fall below 85%. A3 uses will only be permitted in excess of 15% where they would have a beneficial effect on the vitality, viability and appearance of the area.
 - **Secondary Retail Area, Magdalen Street, Anglia Square and St Augustine's District Centre** – various standards for non A1 uses are set out for the different areas.
 - **District and Local Centres** – proportion of A1 uses do not fall below 60%.

- 3.8 The plan notes that the district centres vary in size and nature, with some offering better opportunities for future expansion and enhancement. However, it states that any redevelopment will need to be assessed against the position of the centre in the hierarchy, the sequential approach and the effect on the vitality and viability of other centres.
- 3.9 With regards to retail warehousing, the plan states that proposals to remove conditions restricting the use of retail warehouses will not be permitted. Sub-division of units is allowed where the minimum size of each unit is 1,000 sqm gross and the use is restricted to the sale of bulky goods.
- 3.10 The plan sets out aspirations for new development, including:
- **King Street** - a maximum of 2,000 sqm net of retail floorspace in the form of small speciality or local shop units with appropriate tourism and food and drink facilities.
 - **Anglia Square** - mixed use opportunity on land adjoining Anglia Square, Pitt Street, Edward Street and Botolph Street to provide a maximum of 4,900 sqm net of retail floorspace.
 - **Westgate Tower** – demolition and replacement with a mixed-use scheme with a maximum of 1,500 sqm retail floorspace.
 - **District Centre at Hall Road** – A site for a new District Centre is allocated at the junction of Hall Road and Sandy Lane. The Plan states that the development of this site will be permitted subject to the inclusion of a foodstore of no more than 1,300 sq. metres net, together with at least three local shops of not more than 500 sq. metres net each, residential or office use on upper floors and appropriate service facilities.
- 3.11 Norwich city centre is considered key for the overall economic, sustainability objectives and social functioning of the city and its hinterland. The plan aims to ensure a good mix of different uses in a suitable environment, whilst maintaining control over the mix of uses in the city centre and providing flexibility for small scale change and development that will enhance the retail function.
- 3.12 The plan supports the enhancement of Norwich Provision Market and the use of the market and surrounding area for street activities. There are considered to be opportunities for additional small-scale markets but large open air and Sunday markets will not be permitted.
- 3.13 Within the city centre boundary, various sub-areas are identified as set out below:
- **St Stephens/Market Place Area** – economic heart where the main retailing takes place. Vision is to maintain its prime economic importance for shopping and enhance links with the rest of the city centre. It is not a homogenous zone and various sub- zones are identified.

- **Cultural and Civic Centre** – includes a significant number of major cultural, civic and leisure facilities. Vision is to develop its function as the civic and cultural heart. Potential for further leisure, cultural facilities and a hotel.
- **St Benedict's/ Pottergate** - predominantly residential with some commercial. Vision to retain its domestic scale and character, while enhancing street quality.
- **North Centre/St Andrews** – a transition zone on the north side of the city centre with ancillary uses such as car parks. The area should perform an enhanced economic role, with a more coherent character and design approach, whilst giving more prominence to the main historic attractions of the area.
- **Anglia Square/ St Augustine's/ St Crispins** – comprises modern office buildings and Anglia Square district centre. There are emerging proposals to regenerate the centre for employment, leisure, retail and service uses.
- **Rest of 'Norwich Over the Water'** – traditional forms of development with historic associations. Vision to enhance residential character whilst retaining the mix of uses and regenerating local shopping street of Magdalen Street and St Augustine's Street.
- **Barrack Street/ Whitefriars** – a large industrial site with surplus land due to rationalisation offering opportunities for mixed-use development along the riverside.
- **Cathedral Precinct/ Great Hospital** – enclosed Cathedral Quarter with associated residential uses and green open space. The vision is to retain the character of the area, whilst enhancing the provision for visitors.
- **Prince of Wales Road/ Tombland** – traditionally a mixed-use transitional area but recently has become a strong evening venue with restaurants, cafes, nightclubs as part of the Riverside development. Vision is to maintain and enhance the lively atmosphere of the area with leisure and related activities as a growing contributor to the evening economy.
- **Commercial Office** – densely developed office area with several headquarter buildings. Aim to maintain this area as the main office area in the city.
- **King Street** – a priority area for regeneration to provide a key part of the heritage of Norwich with a mix of commercial, employment, residential and small retail uses.
- **Riverside** – modern retail development with an anchor foodstore and major retailers. The plan aims to integrate the area with the rest of the city centre.
- **Thorpe Road and Station** – gateway into the city centre. Envisaged to continue as a mixed commercial and residential area. The area is not considered suitable for retail or leisure development.

- **South Central Area** – primarily residential area with some commercial premises. Vision to retain the character and green spaces.

Broadland District Local Plan: Replacement

- 3.14 The Replacement Local Plan was adopted in May 2006. The key objectives of the plan's retail policies are to:
- Protect and enhance the role of the Norwich area as a regional shopping centre, providing for a full range of modern retail outlets in appropriate locations;
 - Secure and promote local shopping facilities in appropriate locations;
 - Encourage retail development which is environmentally sustainable; and
 - Protect the vitality of the designated retail areas in the market towns, large villages and the local centres of the Norwich Policy Area.
- 3.15 The plan identifies Aylsham, Acle and Reepham as small market towns/district centres outside of the Norwich Policy Area. Old Catton, Thorpe St Andrew/ Dussindale and the proposed centre at Sprowston are district centres within the Norwich Policy Area. The plan places an emphasis on retail uses in these centres, whilst recognising that there are also many complementary uses.
- 3.16 The plan does not make any provision for additional major convenience floorspace. Criteria are provided to assess applications for new floorspace, or extensions to existing stores outside or on the edge of existing centres. Criteria are also set out for retail warehousing and other comparison goods floorspace proposals in edge or out-of-centre locations.
- 3.17 **Policy SH05** states that applications to vary or remove planning conditions restricting the use of the Sprowston and Sweet Briar Retail Park to the sale of bulky durable goods will not be permitted. In addition, applications to sub-divide existing retail warehouses will only be granted where the minimum size of each unit is 1,000 sqm gross and the use is restricted to the sale of bulky durable goods.
- 3.18 **Policy SH07** promotes local shopping facilities and proposals for small-scale shops or extensions in designated areas are likely to be permitted. The local plan also contains Parish-based policies which provide an important context for the District Centres as follows:
- **Acle's** central area is defined as a commercial area where the Council will seek to retain the existing retail, business and services to maintain its market town character.

- **Aylsham** is an expanding market town and there is a need to protect its vitality and viability to maintain its attractive character.
- **Old Catton district centre** consists of a group of shops around the Somerfield supermarket. There are also parades of shops at Catton Chase and Dixon's Ford.
- **Reepham** is a local shopping centre and the Council will retain its existing retail uses and encourage new retail services and business to help maintain its role as a service centre.
- **Sprowston** is identified as a new centre.
- **Thorpe St Andrew/ Dussindale** has a district centre around the area occupied by the superstore. There are also other parades of local shops in the vicinity.

South Norfolk Local Plan

- 3.19 The Local Plan was adopted in 2003 and shopping is identified as being crucial to maintaining the vitality of the small towns and larger villages in South Norfolk. The current retail hierarchy consists of the major shopping centres of Diss, Harleston and Wymondham, along with the smaller service centres of Hethersett, Hingham, Loddon and Long Stratton.
- 3.20 The plan seeks to maintain the existing hierarchy of retail centres by encouraging retail and service uses in defined Central Business Areas and designating Primary and Secondary areas in the major centres. It also aims to ensure that the nature and scale of retail development is in-keeping with the size and function of the settlement it is intended to serve; to control retailing on sites adjacent to and away from the defined centres; to control changes of use; and to encourage uses over shops.
- 3.21 The plan proposes to provide for its "planned provision" via the allocation of a site for mixed retail and leisure development on the edge of Diss town centre, provisions for local shops and by designating Central Business Areas (CBAs) within the major shopping centres in which a wide range of retailing and services will be encouraged. The plan specifically defines CBAs in Diss, Harleston, Hethersett, Hingham, Loddon, Long Stratton and Wymondham. Primary and secondary shopping areas are defined in Diss, Harleston and Wymondham. The plan encourages local shops and services of an appropriate scale to the needs of the locality. The main shopping policies are as follows:
- **Policy SH01** states that planning permission for new retail development will be granted within the Central Business Areas of the District's main towns and villages. If suitable sites cannot be found within the defined Central Business Areas then consideration will be given

to edge-of-centre locations and finally out-of-centre locations subject to various criteria. In addition, the policy states that the types of goods sold in out-of-centre retail development, and the subsequent sub-division of premises, will be limited by planning conditions or legal agreement.

- **Policy SH02** states that new retail development must be in keeping with the size and function of the settlement it is intended to serve. Impact assessments are required for development above a threshold size.
- **Policy SH03** curtails further retail development at the Longwater Retail Park considered in the context of policies SH01 and SH02 or if the proposal is for a minor alteration to improve operational efficiency or there would be no increase in retail floorspace.
- **Policy SH05** states that in the primary shopping areas changes of use at ground floor level from A1 to A2 and A3 uses will not be allowed. In the Central Business Areas, A1/A2/A3 uses will be allowed provided that they do not require the loss of a Class A1 unit and that the predominant use in the Central Business Area remains A1. In secondary areas, the plan encourages a mix of uses.

- 3.22 The plan also sets out a town centre strategy to improve the quality of the District's town centres by providing an appropriate mix of uses, a high quality environment, good accessibility and improving the range and quality of tourist attractions.

Summary

- 3.23 The relevant local plans are consistent with the advice in PPS6 which seeks to enhance the vitality and viability of town centres. The Broadland and South Norfolk Local Plans recognise the influence of Norwich in the sub-region but also highlight the importance of maintaining and enhancing the retail provision in the network of market towns and large villages which surround Norwich. All of the plans, state the need to ensure that development is consistent with the scale, size and function of the centre. The need to control out-of-centre development is also highlighted.

4. RETAIL TRENDS

4.1 This section examines key trends and drivers of change in the retail industry. We outline the key national trends in retailing and service provision that are impacting on the Norwich sub-Region and its main centres. Our commentary is informed by in-house research and a range of published data sources including research by Verdict Analysis, Mintel and the New Economics Foundation.

i) Economic Growth

4.2 The retail sector has experienced significant growth and change over the last 25 years. This has fundamentally altered the way we shop.

4.3 One of the main drivers behind change has been the growth in incomes and expenditure. Consumer retail expenditure per head over the last 25-30 years has grown at an average compound rate of approximately 3% per annum in real terms. Over recent years growth has been even higher, largely fuelled by strong economic growth and the housing boom. However, a slowdown in growth is forecast due to rising interest rates, increased taxation and falling consumer confidence.

4.4 Most of the past growth in the retail sector has been fuelled by increased spend on comparison goods, with virtually no increase in convenience goods expenditure. Over the last 25-30 years comparison goods expenditure per head has experienced growth of nearly 5% per annum in real terms, (i.e. an overall increase of over 200% in real terms over the last 25 years). In contrast, average convenience goods expenditure has increased by less than 1% per annum in real terms. The stronger growth in comparison goods expenditure has implications for the retail floorspace capacity forecasts set out in Section 11.

4.5 Strong income and expenditure growth has affected retailing in another important way, through the rise in car ownership and shopper mobility. Over the last 25 years the number of households owning one or more cars has increased nationally from about 55% to approximately 75%. Households are now much more mobile than they were and therefore their choices of where to shop and the distances they can travel are much greater.

4.6 Table 4.1 below shows how car ownership varies across the study area. Norwich has a relatively high proportion of households with no car, whereas the ownership levels in both South Norfolk and Broadland are higher. This reflects the difference between 'urban' and 'rural' areas in terms of access to facilities and clearly has implications in terms of where people travel to shop, work

and to carry out a range of activities. It also has implications for what retail and service facilities people need at the local level.

Table 4.1: Car Ownership Levels per Household across the Study Area

	None	One	Two
Norwich City	35.5%	47.8%	13.9%
Broadland District	13.1%	48.4%	30.9%
South Norfolk	13.4%	45.1%	32.3%
UK Average	26.7%	43.8%	23.5%

Source: Norfolk County Council

(ii) Retailer Productivity

- 4.7 Although quantitative evidence is limited, it is apparent that retailers and comparison businesses in particular have over time increased sales densities by achieving improvements in productivity in the use of floorspace. This growth in the productivity is important as it represents the ability of retailers to absorb real increases in their costs (such as rents, rates and service charges). An allowance for the increased efficiency of existing floorspace therefore effectively allows retail businesses to increase their turnover year-on-year to reflect that their costs increase at a higher rate than general inflation and to help them compete with new retail developments and innovations, and thereby maintain the future vitality and viability of existing centres. This is recognised by PPS6 (paragraph 2.34) which requires that quantitative need/capacity assessments have regard to a realistic assessment of the “efficiency” of existing floorspace to increase its year-on-year turnover.
- 4.8 Analysis of historic data is difficult as over the last twenty years sales density increases have been affected by changes in the use of retail floorspace, with higher value space-efficient electrical goods replacing lower value space-intensive goods; the growth in out-of-centre retailing; a number of one-off events like Sunday Trading; longer opening hours; and the very strong growth of retail expenditure relative to the growth in floorspace.
- 4.9 In the future growth rates of 1.5 - 2.5% per annum have been forecast for comparison goods, with minimal growth in sales densities for convenience goods, although this growth in floorspace “productivity” will vary across centres and between stores.

(iii) Centre and Retailer Polarisation

- 4.10 The Government’s town centres first policy objectives, as first set out in 1996 by PPG6, has resulted in a sustained fall in the pipeline of out-of-centre shopping centre and retail warehouse parks over the last decade. There has also been a corresponding resurgence in development

activity in dominant regional centres. It is estimated that the top 70 centres in the country now attract over 50% of the country's population for comparison goods shopping.

- 4.11 This is being reinforced by new development. Almost half of the shopping centre floorspace in the pipeline is destined for these same 70 centres which will further reinforce their dominant market share. This concentration of retailing in larger centres, such as Norwich, is likely to threaten smaller towns unless they are able to secure new development of sufficient scale and quality to retain expenditure, or to provide a niche retail offer.
- 4.12 Retail deflationary price pressures are expected to intensify, due to the growth of the internet, competition amongst retailers, globalisation, the strong pound etc. This will force retailers to concentrate on supply chains, cut costs and be more efficient. It will favour the larger retailers who have stronger buying power and encourage take-overs to achieve improved economies of scale (i.e. the larger and stronger multiples will grow larger and stronger).

(iv) Retailer Requirements

- 4.13 The growth of multiple traders and increased competition between companies has meant that the retail structure is increasingly dominated by large companies with requirements for larger shop units.
- 4.14 Shopping centres and out-of-centre development that can accommodate the demand for larger sized units (typically 500-2,000 sq m or larger) have grown in importance. This has reinforced the trend towards higher order centres and out-of-centre retailing.
- 4.15 The growth in the size of stores has also resulted in a reduction in the number of smaller shop units. This is particularly evident in the food sector, where there has been a marked decline in the number of smaller and more specialist food retailers (such as greengrocers, butchers, fishmongers, bakers etc), and a significant increase in larger food superstores.

(v) Convenience Goods Sector

- 4.16 The town centres first policy has resulted in a significant downturn in planning permissions for new large foodstores in out-of-centre locations. This has driven new development and expansion trends in the grocery sector, such as the growth in applications to extend existing stores for comparison goods retailing. There has also been the movement of the 'top 4' foodstore operators into the smaller convenience store sector to increase market share (such as Tesco Metro and Sainsbury's Local).

- 4.17 Food retailers are now placing greater emphasis on the sale of comparison goods as a proportion of total floorspace, often at the expense of the convenience goods offer. This is because expenditure growth rates for comparison goods are much higher than for convenience goods and margins are greater, although sales densities are often lower.
- 4.18 Discount retailers such as Aldi and Lidl are looking at opportunities to expand their networks and market share across the UK, resulting in a significant increase in planning applications. There has also been a growth in 'forecourt' retailing, operated either by the large supermarket chains, or the major oil companies (such as BP Connect).
- 4.19 In the past five years the 'top 4' supermarket multiples have strengthened their hold on the UK grocery market, taking share from most other operators in the process. Independent and smaller chains of grocers and convenience stores have been the main losers and acquisition targets. All food specialists have come under pressure, while off-licences have suffered heavily from the growing 'beer, wine and spirits' offer of both major grocers and convenience stores. The continuation of these trends, resulting in increased applications for foodstore extensions and discount retailing, could potentially represent a threat to smaller centres and comparison goods retailers.
- 4.20 Verdict forecast that the growth in convenience stores will be further fuelled by a continuation of the present trends of longer working hours and the decline of the nuclear family, so affecting when spending occurs and on what. Verdict predict that consumers will want stores located even nearer to where they live and work, providing longer opening hours to cater for longer working hours.

(vi) Shopping and Leisure

- 4.21 The increase in consumer affluence and mobility over the last 20-30 years, and the rise of the internet of recent years, means that shoppers no longer merely shop to satisfy needs, they increasingly shop to satisfy wants as well. Retailing in the higher order centres and the more attractive smaller centres is changing. Research indicates that shopping is now becoming more of a quasi-leisure experience.
- 4.22 Leisure spending growth is forecast to outstrip that of retail. Quality restaurants, coffee shops, cafés and bars, as well as health and fitness centres and multiplexes in larger centres, are now increasingly important to attract shoppers and encourage longer dwell times and higher spending in centres. The Trocadero in London's West End is an example of this, with mainstream retailers such as HMV, Whittards, Sock Shop and Accessorize taking advantage of the high pedestrian flows created by the major leisure attractions such as Funland, the UGC multiplex and Planet

Hollywood. Mixed-use retail and leisure development has therefore proved to be a real growth area for town centres. Better integration of retail and leisure facilities mutually benefits both sectors.

- 4.23 Since the mid-1990's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. A number of factors have helped drive the growth of leisure venue provision in town and city centres. For example, urban living is back in fashion; town centres can offer consumers a much more vibrant atmosphere in which to eat and drink; and they also offer a much wider choice of leisure venues, allowing more spontaneous decisions. For bars, restaurants and health & fitness clubs, the attraction of the town centre is 'daytime trade', and the ability to capitalise on proximity to businesses and shoppers.
- 4.24 Future demographic and socio-economic trends are forecast to reinforce the shopping/leisure trend. For example, over the next five years the over 60's age group is forecast to increase by 13m (+14.5%) and half of that growth will be in the 60-64 age group. In contrast, the under 60's age group is forecast to decline by 0.2m (or -0.5%). Older shoppers have a younger mindset than in the past, are more fashion aware and financially better off as a result of house price growth, as well as income growth (although failing pensions will be a concern).
- 4.25 The 'grey' shopper has more time to shop, will spend more on DIY and gardening and will expect good customer service. In contrast, research suggests that younger shoppers will have higher education/University fees to pay, will experience higher housing costs and debt, will spend more on entertainment/ leisure, in preference to retailing. These forecasts and trends will reinforce the trends towards shopping and town centres as providing more of a leisure/ entertainment experience, rather than just retail locations.

vii) Home Shopping

- 4.26 Home shopping (mail order and internet shopping) is the main component of non-store retailing. In total, non-store retailing accounts for an estimated 7% of comparison goods expenditure.
- 4.27 Mail order shopping has a long history and, whilst it has suffered to some extent from the rise of the internet, it has evolved and new retailers have entered the market and expanded. Examples include Next, Marks & Spencer and more recently John Lewis. GUS has also bought Argos and Homebase and Littlewoods has purchased Index. These retailers expect home shopping to play an increasing, but supplementary, role to traditional store-based shopping.

- 4.28 E-tailing has experienced phenomenal growth over the last few years, albeit from a very small base. Growth rates of 70% per annum were not unusual two years ago. Although growth has slowed, it still represents approximately 30% per annum, which is significantly higher than for 'bricks and mortar' retailing.
- 4.29 It is estimated that about 5% of retail expenditure is now conducted on the Internet. However, most foodstore operators have closed their 'virtual stores' or warehouses, and operate home deliveries out of existing stores.
- 4.30 The retail sectors that have been most affected by the growth of E-tailing include books, games, DVDs/videos and CDs, along with finance, insurance and travel services. Critically, research has identified that the following sectors could experience a 'squeeze' on their market share of retail spend in the future - small electrical goods, computer hardware and software, white goods, toys and gifts, and some clothing and footwear.
- 4.31 Verdict Research indicates that Internet-based sales will continue to grow strongly, as broadband becomes cheaper and more widely used. They predict that traditional catalogue mail order is likely to suffer most, and not the high street. Verdict forecast that on-line sales will increase by +155% (+20% per annum) over the next five years (2004-2009), whereas total retail spending will increase by +21% (+3.9% per annum) and mail order spending will increase by +8.7% (+1.7% per annum). Verdict expect total retail sales to be £317.1 bn in 2009, of which £291.5bn will be store-based and £25.6bn will be non-store based (i.e. on-line, mail order and TV shopping). Interestingly the on-line total is made up of £10.1bn from bricks and mortar retailers, £3.1bn from Pure Play internet retailers and £2.5bn from mail order on-line sales.
- 4.32 Research suggest that that the retail warehouse sector could suffer proportionately more than town centres, due to the types of goods sold in them. However, we consider that all centres will be affected to a greater or lesser extent, depending on the type of goods they sell and the function they perform. Where town centres adapt, and become more leisure/event orientated, and retailers increasingly use their shops as showrooms running web sites in parallel, conventional retailing should continue to prosper.
- 4.33 Research suggests that Internet shopping will have a more limited impact on the convenience goods sector. Verdict forecast that on-line grocery sales will increase from £1.4bn in 2001 to £5.3bn by 2007, which still only represents 4% of all grocers and food specialist sales.

Summary

- 4.34 National retail trends indicate a continued growth in incomes and expenditure, albeit not at such strong levels as in the last 15-20 years. The growth in expenditure is focused on comparison goods, with a limited growth in convenience goods expenditure.
- 4.35 Increased car ownership has resulted in greater household mobility and therefore the choices of shopping locations and the distances that can be travelled are much greater. Internet shopping has also grown significantly in the last few years and looks set to continue in certain sectors. However, it remains only a very small percentage of overall spending.
- 4.36 Retailers have also continued to evolve their formats and offer, particularly the foodstore operators. With restrictions on out-of-centre stores growing, and changing socio-economic trends, several large operators have returned to the high street with small convenience stores. Operators are also seeking to extend their comparison goods offer, turning stores into variety or mini-department stores. This trend could represent a threat to smaller centres, where the larger out-of-centre stores evolve into one-stop shopping destinations.
- 4.37 There has also been a continued polarisation towards larger centres and the provision of larger stores. Where smaller centres have been unable to diversify their offer or create niche markets they have suffered. The focus on urban renewal has increased demand for town centre sites for a wider range of land uses.
- 4.38 Since the mid-90's, despite higher rents, there has been a steady trend, driven by central government policy, towards building new leisure schemes in town/edge of centre locations. Mixed-use retail and leisure development has proved to be a real growth area in town centres. These trends present significant opportunities and challenges to the District's centres.

5. SUB REGIONAL CONTEXT

- 5.1 This section examines the attraction and influence of other large centres in the East of England region on the current (and future) role and performance of centres in the Norwich sub-Region, and Norwich City Centre in particular.
- 5.2 It draws extensively on the findings of the household telephone interview survey, which broadly identifies shopping patterns across the defined study area. The survey results indicate that the main centres drawing shoppers and trade from the survey area are Norwich, Lowestoft, Great Yarmouth, Bury St Edmunds, Dereham, Thetford, Ipswich and King's Lynn. Plan 2 illustrates the location of these centres.
- 5.3 The key findings of our analysis are described below.

Shopping Patterns

- 5.4 The shopping patterns derived from the household telephone survey enable us to broadly estimate the quantum of comparison goods expenditure that each centre draws from the survey area. As well as the relative strength and attraction of retail offer, this indicator also takes into consideration accessibility and distance from Norwich.
- 5.5 Table 5.1 (also see Plan 4) sets out the estimated expenditure flow to the main centres from the survey area. This is illustrated on Plan 5.

Table 5.1: Study Area Comparison Goods Trade Draw: Key Strategic Centres

Centre	Comparison Goods Trade Draw from Survey Area (£000)	% of Total Available Comparison Goods Expenditure (%)
Norwich	948,116	44.0
Lowestoft	166,826	7.7
Great Yarmouth	165,398	7.7
Dereham	75,309	3.5
Thetford	31,584	1.5
Bury St Edmunds	20,616	1.0
Ipswich	18,839	0.9
King's Lynn	11,310	0.5

Source: GVA Household Telephone Survey 2007

- 5.6 The table shows that Norwich achieves the highest market share of comparison goods spend (44%) from the survey area, totalling £948.1m. This is a significant market share and reflects

Norwich's geographical location and role as a sub-regional centre. It also reflects the scale and quality of its retail offer, and its overall attractiveness as a historic tourist/visitor destination.

- 5.7 Lowestoft, Great Yarmouth and Dereham are achieving market shares of 7.6%, 7.7% and 3.6% respectively. Although these centres are significantly smaller than Norwich, they do fall within the survey area and consequently a greater proportion of their catchment areas are covered by the survey area. We do not consider that these centres represent competition to Norwich, given the limited scale and quality of their retail offer, as well as the limited development and investment activity planned for these centres at present. However, these centres could represent a threat to the smaller market towns within Broadland and South Norfolk in the future, such as Diss, Wymondham, Harleston and Alysham.
- 5.8 Collectively, the key centres highlighted above draw 69.6% of total available comparison goods expenditure from within the Norwich sub-region survey area. The remaining 30.4% will be directed towards smaller local shopping facilities, other town centres and other out-of-centre provision both within the study area and beyond.
- 5.9 We consider that a number of the strategic centres in the wider region could increase their market share from within the Norwich sub-region following new retail investment and development. This, in turn, could impact the attraction and performance of Norwich and other centres in the sub-region over the forthcoming LDF period. We consider the extent of this threat below. In addition, Cambridge could also draw increased trade from the Norwich sub-region survey area as its retail offer is improved.

Benchmark Centres – Key Performance Indicators

- 5.10 The following sets out our assessment of the scale and attraction of each of the benchmark centre's current retail offer, as well as the scale and quality of planned and proposed new retail floorspace. Appendix 1 provides a more detailed analysis of the key performance indicators for Norwich City benchmarked against the main competing centres.
- 5.11 Our profile of the relative strengths and weaknesses of these main centres, and the potential threat to Norwich City and the other study centres, is based on a number of primary and secondary data sources. These include the household survey, PROMIS, Javelin Venuescore Retail Rankings, Focus Property Intelligence database and EGi (see Appendix 1). We also comment on the extent to which this new development could, in our judgment, change and influence shopping patterns across the Norwich sub-region in the future.
- 5.12 The key headline findings of our analysis are as follows:

- **National Rank** - The vitality rank position of each of the centres has been derived from Javelin (Venue Score). As Appendix 1 shows, Norwich is ranked 5th nationally and is the highest placed centre in the Eastern Region, significantly higher than Ipswich (43rd) and Cambridge (78th).
 - **Retail floorspace** - Norwich is the largest centre, with a total gross floorspace of 207,000 sqm based on figures derived from PROMIS¹. In comparison Ipswich and Cambridge both have approximately 121,000 sqm of gross retail floorspace.
 - **Prime Zone A Rental Levels** – Cambridge has the highest estimated rental levels, with Norwich placed second. The higher levels in Cambridge reflect the quality of its shopping offer and the fact that the high demand for space in the city, as highlighted above is not matched by the supply of modern floorspace, due to the historic constraints on development.
 - **Retailer Requirements** – Cambridge has the highest recorded market demand, with 175 requirements recorded in October 2006. Norwich had 90 requirements, which is higher than Ipswich, Bury St Edmunds, Lowestoft, Great Yarmouth and King's Lynn.
 - **Prime Retail Yields** - Ipswich, Cambridge and Bury St Edmunds have lower yields than Norwich. This is probably explained by the recent Chapelfield development in Norwich which has satisfied investor and retailer demand over the short term.
- 5.13 The key performance indicators (KPI's) indicate that Norwich City is a strong shopping destination in the sub-region, and the scale and quality of its retail offer has recently been increased by the Chapelfield development.

Benchmark Centres – Investment and Development

- 5.14 The following provides an overview of the main retail floorspace either planned or proposed in the benchmark centres. We have worked with each local planning authority to clarify the position regarding new developments in the pipeline.
- 5.15 The identified increase in the quantum and quality of retailing in the benchmark centres could result in an increase in their market share of comparison goods expenditure from the Norwich sub-regional survey area. This, in turn, would result in an increase in trade leakage from the survey area and an impact on the overall turnover and performance of the study centres.
- 5.16 The main retail developments and investments planned for the benchmark centres are briefly described below:

¹ This floorspace figure varies from the floorspace as calculated by Norwich CC/ GVA Grimley. We have referred to the Promis figure here to enable us to compare like with like.

- **Cambridge** – The city will reinforce its position in the region's retail hierarchy with the opening of the Grand Arcade Scheme in 2008. This is a major redevelopment in the heart of the city centre. It will comprise approximately 24,619 sqm of net additional retail floorspace, to be anchored by a new replacement John Lewis department store. This could attract more people to Cambridge from the south west periphery of Norwich's catchment area, particularly in Zones 23 and 24. It could also have a more limited impact in other survey zones, with people visiting Cambridge for a different retail experience or as a linked-trip to carry out other activities combined with shopping. However, given the substantial journey time between the two centres, its impact on Norwich's draw from the survey area is likely to be minimal.
- **Ipswich** - The town's retail offer is likely to be improved over the LDF period by the proposals for new retail floorspace and mixed uses in the Mint Quarter, on the edge of the existing Prime Shopping Area. This scheme is to be developed by the Shearer Property Group, although we understand that a planning application has not yet been submitted. There are also several smaller retail schemes in the pipeline. For example, significant mixed-use redevelopment is taking place in Ipswich's waterfront area, although these are more residential and leisure orientated. Nevertheless, we consider that it is unlikely that the Mint Quarter scheme will have the critical mass to increase the town's draw from Norwich's existing catchment.
- **Bury St Edmunds** – Although this centre does not feature as a major competing centre in terms of the key performance indicators, a major redevelopment is planned for the former cattle market. A scheme is due to open in 2008 and will comprise approximately 24,619 sqm of net additional retail floorspace, to be anchored by a Debenhams department store. This development will significantly enhance Bury's existing retail offer and could, in our judgement, attract people from the south of Norwich's catchment area, particularly from Zones 23 - 29.
- **Great Yarmouth** – This centre's retail offer and attraction is also improving. A planning application has been submitted to extend the Market Gates Shopping Centre and the town was chosen as one of the preferred locations for a large casino. The URC Masterplan also proposes significant retail and leisure uses in the North Quay area, although this is not yet formally allocated. This could help to attract more people to Great Yarmouth from Norwich's catchment over the LDF period.

5.17 We also understand that there are proposals for additional new retail development in Lowestoft, Dereham and Thetford. For example, Tesco are looking to expand their existing store in Dereham and the Council are currently considering the planning application. Thetford has planning permission for the expansion of its Forest Retail Park to include four new retail units comprising an additional 2,700 sqm gross retail floorspace. Thetford has also been identified as a

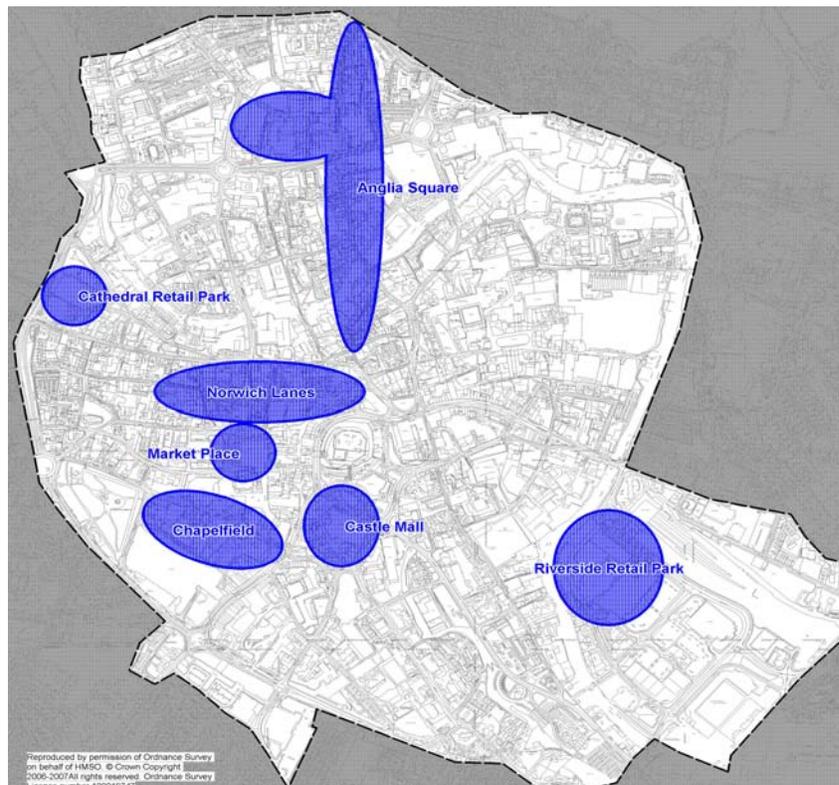
growth centre in the East of England RSS and thus could experience new retail development in the future.

Summary

- 5.18 In terms of the sub-regional context, the household survey has identified that Norwich retains a significant proportion of comparison goods expenditure from the survey area. This reflects its sub-regional role and the relative strength and attraction of its retail offer.
- 5.19 The main centres drawing shoppers and trade from the sub-region are Norwich, Lowestoft, Great Yarmouth, Bury St Edmunds, Dereham, Thetford, Ipswich and King's Lynn.
- 5.20 Norwich's geographical position means that it is unlikely to lose a significant proportion of trade from its catchment over the forthcoming LDF period. However, it is important to recognise that centres such as Cambridge, Bury St Edmunds and Ipswich are all enhancing their retail offer, which could increase their draw from Norwich's sub-regional catchment. The smaller market towns in Broadland and South Norfolk could also be impacted by growth in neighbouring centres, particularly Lowestoft, Great Yarmouth, Dereham, Thetford and King's Lynn.
- 5.21 It is therefore important for Norwich to maintain its position as a sub-regional centre, through continued new investment in its shopping environment and offer. Any future town centre development and investment should protect and enhance its historic environment, the tourist economy and its specialist retail offer. Shoppers and visitors come to Norwich for a variety of reasons, not just shopping, and therefore the city needs to retain its recognised identity and character. This is discussed in further detail in Section 13.
- 5.22 It is also important that the smaller market towns of Harleston, Diss, Aylsham and Wymondham maintain their roles by providing a range of everyday services for their local populations and attracting tourist spend.

6. NORWICH CITY CENTRE: QUALITATIVE ASSESSMENT

- 6.1 Norwich city centre is a regional centre located in East Anglia. It occupies an isolated location geographically with an extensive catchment area across Norfolk. It is the regional administrative centre and county town of Norfolk. The most recent national retail rankings produced by Javelin Venuescore (2006) place the city 5th in the UK, behind only Glasgow, Birmingham, Edinburgh and Manchester. Norwich's location in relation to other regional centres means that it has a very strong catchment extending across a wide area, into most of Norfolk and North Suffolk.
- 6.2 The city's Primary Retail Area comprises a number of distinct retail areas encompassing the historic city centre (including Chapelfield and Castle Mall shopping centres), Riverside Retail Park and a Sainsbury's store located to the south of Queens Road. Cathedral Retail Park also falls within the city centre boundary and is defined as a Secondary Retail Area. These areas are illustrated on the plan below. The retail area around Anglia Square and Magdalen Street falls within the city centre boundary but is separated from the primary retail area by the River Wensum. This area is defined separately in the Local Plan as a large district centre.



- 6.3 This healthcheck assessment examines the city centre as a whole, but excludes Anglia Square which is addressed separately (see section 7). The explanatory note in Appendix 3 provides a more detailed description and explanation of the healthcheck methodology and Key Performance Indicators (KPIs) used here.

Diversity of Uses

- 6.4 Table 6.1 below sets out the composition of the city centre in terms of both number of units and floorspace, as provided by Norwich City Council for January 2007. The table below compares these figures with averages for all centres nationally as calculated by Experian Goad. Please note that there may be discrepancies in the way the way the Council and GVA Grimley has categorised some of the service units. Thus, whilst the figures cannot be precisely compared, it nevertheless provides a useful guide.

Table 6.1: Norwich City Centre Composition (Excluding Anglia Square) at January 2007

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	76	4.6	9.1	13,932	4.8	16.6
Comparison	681	41.4	46.4	178,938	61.5	51.6
Service	727	44.2	32.6	75,354	25.9	21.5
Vacant	162	9.8*	10.5	22,549	7.8*	8.9
Total	1,646	100%	100%	290,773	100%	100%

Source: Norwich City Council and GVA Grimley Survey 2007

Note: * See paragraph 6.19 onwards for a more detailed commentary on the breakdown of this vacancy level figure

- 6.5 It is apparent that the city centre has a relatively low proportion of convenience floorspace and units. Of the convenience floorspace, 55% is in the edge-of-centre locations at Morrison's Riverside, Sainsbury's Brazen Gate and Farmfoods at Cathedral Retail Park. This is reflected by the results of the in-centre survey. Table 6.2 below shows that only 9% of people in the city visited primarily for food shopping.

Table 6.2: Main Purpose of visit

	Norwich City Centre (Exc Anglia Square)	Riverside
Non-food shopping	44%	26%
Food shopping	9%	11%
Visit specific shop	0%	22%
Service (financial or personal)	11%	1%
Browsing	5%	8%
Socialising	5%	4%
Other	26%	28%

- 6.6 The city has a high proportion of comparison floorspace and the scale and quality of its non-food shopping offer attracts most people to the city. For example there are six department store operators in the city centre. Norwich is also a significant location for financial and personal services, which account for a high proportion of total floorspace.

Retailer Representation

- 6.7 Norwich benefits from an excellent mix of both national multiple retailers and successful independent traders. Multiples retailers account for around 44% of the units in the city centre, which is higher than the UK average of 34% for all town centres covered by Experian Goad.
- 6.8 There are two managed shopping centres in the city centre (see Table 6.3):
- **Castle Mall** opened in 1993 and was the first large-scale retail development in Norwich for over 20 years. It comprises over 80 retail units and a number of small kiosks. The centre has two main mall levels, plus a food court and two further small trading areas located on the third and fourth levels. Its tenant mix comprises a number of prominent retailers such as Boots, Virgin, H&M, Peacocks and New Look. TK Maxx has a store in the basement area and there is a Vue multiplex cinema located on the fourth floor.

Table 6.3: City Centre Managed Floorspace

Shopping Centre	Type of development	Date of Opening	Retail Floorspace (sqm gross)	Anchor Retailers
Caste Mall	90% enclosed 10% open shopping centre	1993 (Refurbished 1999 and 2005/6)	38,554	Argos/Boots/H&M/Virgin, Vue Cinema/TK Maxx
Chapelfields	Shopping Centre	2005	49,238	House of Fraser/Borders/Zara
Cathedral Retail Park	Edge of centre retail park	1988 (reconfigured in 1999)	5,452	TK Maxx/Brantano/Farmfoods/Toys R Us (opened in 1999).
Riverside Retail Park	Retail park	2001 (Morrisons opened in 1999)	23,412	Morrisons(7,729 sqm gross)/Woolworths/Big W/Argos Extra/Next/Currys

Source: Egi and Trevor Woods

- Chapelfield** shopping centre opened in September 2005 and is anchored by House of Fraser. It has a strong fashion provision including retailers such as Zara, River Island and French Connection. Although the shopping centre has two main pedestrian entrances (i.e. Rampant Horse Street and St Stephens's Street), it is still somewhat divorced from the city centre. We consider that pedestrian legibility and permeability to the centre could be significantly improved. There have also been reported concerns over the initial sales performance of the shopping centre, its opening hours and problems with traders moving out. However, the scheme won the 2006 British Council of Shopping Centres (BCSC) Gold Award for 'Best In-Town Retail Scheme'. This is a prestigious award which is based on a number of factors including; commercial success from a tenant's viewpoint, integration with surrounding city centre, contribution to regeneration and architectural design.

6.9 Traditionally the city centre's prime pitch has been the pedestrianised Gentleman's Walk and the eastern side of Haymarket, with Jarrold's department store to the north and Debenhams and Marks and Spencer to the south. Retailers along here include some of the major high street fashion multiples such as Next, Primark and Top Shop. This is also the location of Norwich Market which is the largest six day open-air Market in Britain (pictured). There are 160 permanent stalls selling fresh meat, fish, cheese, fruit & vegetable, household products etc.



Market Place



'Norwich Lanes' – Swan Lane

- 6.10 Royal Arcade is a speciality covered mall that connects Gentleman's Walk with Castle Street. The arcade offers very attractive accommodation for mainly quality independent retailers jewellers, toy/ gift shops, ladieswear as well as a Waterstones book store. The pedestrianised north-eastern part of the city centre around London Street is home to a number of traditional specialist retailers, as well as higher end multiples such as Austen Reed and Russell & Bromley.
- 6.11 In contrast, St Stephen's Street to the south of the city centre has a mass market offer. The street is one of the few remaining in the core area not to be pedestrianised and has a number of large retail units accommodating Marks & Spencer, Bhs and a Co-op department store. The city also has a John Lewis department store on All Saints Green, although it is slightly divorced from the city centre core.
- 6.12 In 2005 city traders joined together under the umbrella of the 'Norwich Lanes' to give themselves an enhanced identity. The 'Norwich Lanes' area encompasses the streets around Dove Street, Lower Goat Lane, Swan Lane (pictured), Bedford St, Exchange St and Pottergate. This area is characterised by cobbled streets, narrow lanes and thriving independent and specialist retailers. The area encompasses Jarrolds department store which is family run and has been anchoring the Lanes area since 1823. There is also a range of independent boutiques stocking local and international designers and a good range of services such as hairdressers and beauty salons.
- 6.13 Riverside Retail Park falls within the city centre boundary and is located to the east of the city adjacent to the station and Carrow Road football ground. The retail provision here is accommodated in typical retail warehouse style units with occupiers including Morrisons, Woolworths Big W, Argos Extra, Next and Currys. It is apparent from the in-centre survey that Riverside functions as a separate retail destination to the city centre. Of the shoppers interviewed at Riverside, 43% of people did not visit Norwich city centre as part of their trip, with only 8%

always combining their shopping trip with the city centre. Riverside Retail Park is essentially a car-based destination and has a large surface car park. The poor linkages are also explained by the fact that the scheme is a considerable walking distance from the city centre.

- 6.14 Cathedral Retail Park falls within the city centre and lies on the western boundary. It is considerably smaller than Riverside and comprises four units, namely TK Maxx, Brantano, Farmfoods and Toys R Us. Both Riverside and Cathedral retail parks have open A1 consent.
- 6.15 Convenience provision in the core of the city centre is limited to a Tesco Metro on Guildhall Hill and Iceland on St Stephens Street, as well as Marks and Spencer Foodhall. There is also a large Morrisons store at Riverside Retail Park (7,729 sqm gross) and a Sainsbury's on the edge of the city centre boundary, on the south side of Queens Road. In addition the market also comprises numerous convenience stalls.

Leisure Provision

- 6.16 Norwich city centre has a good range of pubs, clubs and restaurants and a strong evening economy distributed around the city centre. St Benedict's Street has a particularly good provision and includes a Pizza Express, Pinocchio's and a number of Indian and Thai restaurants. There are also a number of pubs such as the Ten Bells and The Plough. There is a high concentration of pubs and



restaurants around Orford Place and Timberhill including Henry's, Nando's and Gardeners Arms. There is also a restaurant area (pictured) as part of the Chapelfield development on the Rampant Horse Street entrance. Current occupiers include Wagamama's, Tootsies and Mackintosh's Canteen, along with restaurants on the second floor.

- 6.17 Adjacent to Riverside Retail Park is a leisure complex which has a Hollywood Bowl, Fitness Exchange and a 14-screen Odeon cinema. There are also a wide range of mainstream bars and restaurants including Frankie & Benny's, Brannigans, Old Orleans, Lloyds Bar and Nando's, as well as a nightclub. In addition, there are a number of independent and ethnic restaurants spread across the City Centre, with specific clusters on St. Benedicts and Magdalen Street. There are a number of take-aways and nightclubs on Prince of Wales Road.

- 6.18 The city centre has strong commercial leisure provision with a bingo hall, bowling alley and four cinemas. There are also a number of health and fitness clubs and a swimming pool. The location of these is illustrated on Plan 8. The city centre has a good number and range of theatres which are also illustrated on the Plan. There are also a number of museums throughout the City. Further details and analysis of leisure provision across the study area is set out in Section 11.

Vacancies

- 6.19 As shown in Table 6.1, Norwich has a vacancy rate of 9.8% (i.e. proportion of total outlets that are vacant), which is marginally below the Experian Goad national town centre average of 10.5%. In general terms, this provides a positive indication of the relative strength of the city centre's retail offer. Furthermore, the Experian Goad figure could be on the high side, as it includes units which are either under construction, being refurbished and/or being fitted out for new occupiers.
- 6.20 Our analysis indicates that these vacant units are distributed fairly evenly around the centre and there do not appear to be any significant clusters that would normally highlight failing shopping areas. However, there have been significant changes in occupation over the last two years, following the opening of Chapelfield. For example, a number of retailers have taken space in Chapelfield and relocated from other town centre units, although most of the vacated units have now been re-let.
- 6.21 Chapelfield has seen a number of tenant changes since its opening. At the time of our audit in January 2007 there were three units on the lower mall that remained vacant. There is currently a cluster of vacant units around the entrance to Chapelfield on St Stephens Street, although a number of these are under alteration and in the process of being re-let. A large vacant unit, which was previously occupied by Boots, is currently being reconfigured to create two new units.
- 6.22 At the time of our audit there were ten vacant units in Castle Mall shopping centre. This is probably explained by a number of retailers relocating to larger units in Chapelfield. Nevertheless, the overall vacancy rate in the city is not currently a major cause for concern given the relatively recent major changes in the city's retail provision following the opening of Chapelfield.
- 6.23 There are no vacant units at Riverside. In the remainder of the Primary Shopping Area (i.e. excluding Chapelfield and Castle Mall) we estimate that there are 26 vacant units. In total, therefore, only some 2.3% of Use Class A1 retail floorspace in the Primary Shopping Area is vacant.

- 6.24 In our assessment of vacancy levels we have also had reference to Norwich City Council's '*City Centre Shopping Floorspace Monitor*' published in January 2007. Our figures differ from the City Council's dataset for two main reasons. First, we have considered all floorspace (including Use Classes A3, A4 and A5), whereas the Floorspace Monitor only looks at Class A1 Uses. Second, the Council's figures also include Anglia Square, whereas we deal with this separately (see Section 7). Nevertheless, the Council's Floorspace Monitor does confirm that the City Centre's vacancy levels (including Anglia Square) for Class A1 Uses of 8.9% is below the Experian Goad national average.

Retailer Demand

- 6.25 There is strong demand from retailers to locate to Norwich as Table 6.4 below shows. The full breakdown of requirements can be found at Appendix 6.

Table 6.4: Norwich City Centre Requirements

Retail Category	No. of Units	Min. Floorspace sq m Gross	Max. Gross Floorspace sq m
Comparison	51	26,846	45,436
Convenience	3	678	836
Service	27	7,111	13,308
Leisure/ other	9	33,695	42,502
TOTAL	90	68,331	102,081

Source: Focus

- 6.26 There is relatively strong interest from value comparison goods retailers (such as Matalan), as well as higher end/specialist retailers such as Jo Malone, Lombock and Billabong. There is also strong demand from a range of quality restaurants and bars such as Ask, Elbow Rooms and Zizzi.
- 6.27 This high demand, coupled with current low vacancy levels, suggests that the units that are available to let are not suitable for these retailers, either in terms of location, configuration or size.

Rents

- 6.28 Prime Zone A retail rents stand at £2,260 per sqm in 2006 in Norwich city centre. Between 1999 and 2004 rents remained stable at around £2,153 per sqm, whereas rents in other centres in the region were growing. Rents did subsequently increase to £2,260 in 2005, which is explained by the Chapelfield development.

Yields

- 6.29 Yields in Norwich currently stand at 5.5% and have moved out from 5% in 2002. This movement could be due to the Chapelfield development, although investor confidence in the centre remains strong.

Accessibility

- 6.30 Norwich is fairly isolated geographically. The nearest motorway is the M11, which is around 112 km to the south west. Major trunk roads to the Norwich area are the M11, A11, A12, A140 (from London and the south) and the A14, A47, A1 (from the north and west).
- 6.31 Norfolk County Council operates six purpose built Park-and-Ride sites, more than any other city in the UK. These provide 4,912 spaces, located on the main routes into Norwich city centre. County Council figures show that more than 3.7 million passengers used the Park-and-Ride 2006. The city centre also has a number of car parks illustrated at Appendix 5.
- 6.32 It is apparent from the in-centre survey that shoppers use a range of modes to travel to the city centre. As Table 6.5 shows, the car is most popular mode of travel. However for the city centre, a high proportion of shoppers use the bus or walk. It is clear that public transport is a much less popular mode of travel for those visiting Riverside, reflecting the fact that it functions more as an out-of-centre shopping destination.

Table 6.5: Mode of Travel

	City Centre	Riverside
Car	36%	68%
Bus	27%	6%
Park & Ride	8%	2%
Train	3%	1%
Taxi	0%	1%
Walk	20%	21%
Cycle	4%	0%
Motorcycle/ moped	2%	1%

Source: In-centre survey 2007

- 6.33 Norwich train station is located towards the east of the city centre and trains operate to Norwich from London's Liverpool St Station, every 30 minutes during the day. The journey time is approximately 1 hour 50 minutes. A direct service also links Cambridge to Norwich, with an

approximate journey time of 1hr 10mins. There are also local rail routes to Great Yarmouth, Lowestoft, Cromer, Wymondham, Diss and Thetford. Local stations on the network give rise to different working patterns and potentially shopping patterns. For example, Diss and Norwich commuters to London; and Wymondham and Norwich commuters to Cambridge. There is a good local bus network covering Norwich and much of Norfolk.

- 6.34 The in-centre survey also ascertained shoppers' opinions on accessibility. The results are summarised in Table 6.6 below. Overall shoppers stated that ease of accessibility to the city acceptable. Responses were more mixed in terms of ease of parking and public transport access to both the city centre and Riverside.

Table 6.6: Shoppers Opinions of Norwich City Centre Accessibility

	Good	Ok	Bad	Don't Know
Norwich City Centre (Excluding Anglia Square)				
Easy to park	32%	24%	15%	29%
Good public transport access	44%	22%	11%	23%
Easily accessible from home	56%	21%	5%	18%
Easily accessible from work	33%	14%	4%	50%
Riverside				
Easy to park	43%	24%	20%	13%
Good public transport access	43%	26%	13%	18%
Easily accessible from home	59%	25%	6%	10%
Easily accessible from work	53%	21%	5%	22%

Source: In-centre survey 2007

- 6.35 The survey asked shoppers if there were any factors that discouraged them from visiting the city centre in the evening. The second highest answer at 11% was a 'lack of public transport'. This suggests that people may have issues with how late into the evening buses and trains run and/or the low frequency of services in the evenings.

Customer Views and Behaviour

- 6.36 The in-centre survey results (summarised in Table 6.7 and set out in full at Appendix 6) indicate, that shoppers are generally happy with the range of shops and services in Norwich. In all categories the majority of people rated the range of the particular shops or services as 'good'.

Table 6.7: Shoppers Opinions of Norwich City Centre (Excluding Anglia Square and Riverside)

	Good	Ok	Bad	Don't Know
Range of food shops and supermarkets	62%	22%	3%	13%
Range of clothes shops	77%	13%	2%	8%
Range of other non-food shops	70%	20%	1%	10%
Number of national chains	62%	22%	2%	15%
Range of entertainment, restaurants and pubs	60%	21%	2%	17%
Range of banks and financial services	59%	19%	1%	21%
Market	62%	19%	2%	18%

Source: In-centre survey 2007

- 6.37 It is slightly surprising given the relative lack of city centre supermarkets that 62% of shoppers rate the range as 'good'. This may be explained by the strong provision of foodstores on the edge of the city centre. The fact that 77% of shoppers rate the range a clothes shops as 'good' is very positive, as this is an important aspect in drawing shoppers to any town/ city centre.
- 6.38 It is apparent from the in-centre survey that the city centre and Riverside Retail Park function as separate retail destinations. Of the shoppers at Riverside, 43% never visit the city centre as part of their trip and only 8% always visit both. There were similar results when shoppers in the city centre were asked if they ever also visit Riverside. Some 52% said they never visit Riverside as part of their trip and only 6% said they always combine their shopping trips.

Perception of Safety and Occurrence of Crime

- 6.39 Table 6.8 below sets out shoppers perceptions of crime and safety based on the in-centre survey results. It is apparent that people perceive the levels of safety in the city centre as being better than in Riverside or Anglia Square. However, when asked if there were any factors that discouraged them from visiting in the evening, the highest response in the city centre (16%) was that it 'feels unsafe'. This suggests that although perceptions of crime and safety is not a problem in the daytime, it is in the evening.

Table 6.8: Shoppers Opinions Norwich City Centre's Safety and Security

	Good	Ok	Bad	Don't Know
Norwich City Centre	57%	30%	5%	8%
Riverside	50%	20%	18%	13%
Anglia Square	20%	52%	19%	9%

Source: In-centre survey 2007

Environmental Quality

- 6.40 Norwich is an attractive and historic city. The central streets still follow their Medieval course, outlined by what remains of the ancient city walls. The city is dominated by the Cathedral and Medieval Castle with another key landscape feature being the River Wensum. The forum is the city's newest public building, and is an impressive landmark, situated in the heart of the city centre. The whole of the city centre within the Medieval city walls is a Conservation Area. This covers all of the retail areas with the exception of Riverside and the Sainsbury's to the south of Queens Road.
- 6.41 Although Norwich city centre has a strong identity and 'sense of place', the physical environment and character varies throughout the city, from the narrow historic Norwich Lanes area to the bright, modern Chapelfields development. Both the shopping areas are sympathetic to the historic environment. The Castle Mall scheme also represents a creative solution to the problem of sensitively accommodating new retail space in a historic city centre environment. The building is largely concealed underground and built into the side of a hill, with a public park on its roof in the area south of the Castle.
- 6.42 The pedestrianisation of much of the city centre has resulted in a pleasant and safe shopping environment. The streets are generally litter free and the paving, signage and hard landscaping of high quality, particularly around London Street (pictured). There are few trees in the city centre. Where there are trees, they make a positive contribution to the townscape quality. Shop fronts in the Norwich Lanes area are particularly well maintained and there has clearly been recent investment in the area in terms of paving and fascias. The market place (established by the Normans between 1071 and 1074) has also recently undergone substantial redevelopment and modernisation.



London Street

- 6.43 We also understand that parts of the city centre have benefited from recent investment in the public realm, including repaving, using S106 money. Areas that have specifically benefited include St Stephens Street, Rampant Horse Street and St Peters Street, as part of the strategy to integrate these shopping areas with Chapelfield. Traffic management changes have also redirected a good deal of traffic out of St Stephens Street. Nevertheless, despite this recent investment, we consider that St Stephens Street could still benefit from further improvement in its environment. For example, the heavy traffic in this area still impacts upon the pedestrian experience, and shop frontages appear dated and tired looking. There are also a number of vacant buildings and shop units throughout the centre which detract from the urban environment. Examples include 1 Brigg Street (formally Pilch Intersport) and Westlegate House.
- 6.44 The in-centre survey results indicate that 67% of shoppers think the attractiveness of the city is 'good', with 21% rating is as 'ok' and only 2% as being 'bad'. This response is significant as 72% of respondents to the survey thought it was important that a centre is attractive and a nice place to visit. These results are very positive and show overall satisfaction with the physical environment of the centre.

Pedestrian Footfall

- 6.45 PMRS's most recent pedestrian footfall survey was undertaken in May 2006. The results from this survey show the locations with the highest footfall as being (in descending order):
1. Dorothy Perkins, 6 Haymarket
 2. Ernest Jones, 3 Brigg Street
 3. Birthday Cards, Castle Mall Ground Floor
 4. The Disney Store, Castle Mall Ground Floor
 5. Borders, Chapelfield Ground Level
- 6.46 It is apparent from these results that the highest footfall is around Haymarket and Castle Mall. It is interesting to note that the recorded footfall in Castle Mall was generally higher than for Chapelfield. However, this is probably explained by the fact that Chapelfield had only been open for around six months at the time of the footfall surveys and trading patterns will take time to settle. Footfall is considerably higher near the Rampant Horse Street entrance to Chapelfield than the St Stephens St entrance. As Table 6.9 below shows, pedestrian footfall along St Stephens St has decreased. This may be due to the increase in vacancies.
- 6.47 In 2004 the highest recorded footfall was in Castle Mall and Haymarket/ Gentleman's Walk. When comparing the 2006 results to the 2004 survey (Table 6.9 below), it is clear that

Chapelfield has shifted the retail gravity of the centre somewhat, although maybe not to the extent that may have been expected.

Table 6.9: Pedestrian footfalls 2004 and 2006

Location	2004 Count	2006 (Count)	Change
Black's (London Street)	30,420	55,410	+82%
Curry's Digital (formerly Dixons (Gentlemans Walk)	92,760	145,490	+57%
Marks & Spencer (Rampant Horse Street)	50,750	68,120	+34%
Tesco Metro (Guildhall Hill)	48,500	54,000	+11%
Birthday Cards (Castle Mall ground floor)	125,790	118,170	-6%
Debenhams (Red Lion Street)	64,800	60,140	-7%
Millets (St Stephens Street)	56,900	50,005	-12%
John Lewis (All Saints Street)	19,550	15,250	-22%
Next (Hay Hill)	64,520	36,570	-43%
Borders (Chapelfields Ground Level)	-	89,930	-

Source: PMRS 2004 and 2006 Surveys

(Note: The numbers represent estimates of the total number of pedestrians passing over each site over a six hour period between the hours of 10am to 5pm during Monday to Saturday).

Out-of-Centre Provision

6.48 Norwich Urban Area is served by a number of out-of-centre retail warehouse parks (see Plan 7) - namely Longwater, Hall Road, Sweet Briar and Sprowston Retail Parks - representing a total comparison goods, floorspace of 42,439 sqm net.

- **Sprowston Retail Park** lies 4 km north-east of the city centre, adjacent to the city's outer ring road, but within Broadland District. The park opened in 1995 and comprises 12 units including a wide range of furniture/furnishings retailers such as Furniture Village, The Sofa Company and Land of Leather, as well as Pets at Home and JJB Sports. There is one vacant unit on the park, which was formerly occupied by Miller Bros.
- **Sweet Briar Retail Park** lies 3 km to the north west of the city centre and opened in 1990. It comprises five units and was extended in 2000 to accommodate a Curry's unit. The other tenants are PC World, Allied Carpets, Carpetright and Paul Simon.
- **Hall Road Retail Park** lies to the south of the city centre and opened in 2000. It comprises Homebase, WJ Aldiss, Bennetts and Pets and Home.

- **Longwater Retail Park** (also known as Norfolk Retail Park) is the only retail park in South Norfolk, but it falls within the defined Norwich Urban Area. The scheme has a total floorspace of 13,309 sqm net comprising seven units, although three are currently vacant. Two of these units have been vacant since the park opened in 1998 and one has been vacated by DP Furniture Express. Retailers on the park are Pets at Home, Staples, The Range and Norwich Lighting Centre. The household survey indicates the retail park is trading below expectations, with a market shares of under 1% in all zones. Nevertheless, there is planning permission to install mezzanine floors in all seven units which would effectively double the retail park's floorspace if implemented.
- **Other out-of-centre free standing retail warehouse units** - include Halfords, MFI, Topps Tiles and Wickes representing a total non-food floorspace of 21,195 sqm net (See Plan 7). Other stand-alone retail warehouse units in the Norwich Urban Area include a 7,768 sqm net B&Q store, as well as Comet and Magnet stores. A 7,610 sqm net B&Q store on Hall Road also opened for trading on 15th March 2007 and would not, therefore, have been identified by the January 2007 household survey.

6.49 The main out of centre convenience offer in the Norwich Urban Area is as follows (see Plan 6):

- Asda - Hellesdon (4,973 sqm net)
- Lidl - Aylsham Road (1,260 sqm net)
- Tesco - Harford Bridge (3,809 sqm net)
- Sainsburys - Longwater (3,202 sqm net)

Summary

- 6.50 Norwich is a major Regional Centre and draws trade from an extensive catchment across Norfolk and the wider region. It has an attractive environment with architecture dating from the medieval period. The centre has a unique identity and character, attracting tourists and visitors throughout the year.
- 6.51 Norwich has a strong comparison offer, with an excellent mix of independent and national multiple retailers. Its retail offer is anchored by a 160 stall permanent market as well as two managed shopping centres. Chapelfield has a good range of retailers and is anchored by House of Fraser. However, its integration and legibility with the rest of the city centre could be improved.

- 6.52 Despite the opening of Chapelfield, demand from retailers looking to locate in Norwich remains strong. This suggests that there is potential to strengthen and increase the centre's retail and leisure offer. Also vacancy levels in the centre are relatively low benchmarked against the national average and there are no significant clusters of vacant units. This would also seem to suggest the potential to provide larger modern units to satisfy demand.
- 6.53 For a centre of its size, Norwich has a limited convenience floorspace within the city centre itself. However, the market provides a good range of food products and there are some high quality delicatessens and specialist food stores.
- 6.54 Norwich has a good leisure offer with bars, restaurants, cafés and nightclubs located throughout the city centre. The City's leisure offer is further reinforced by the Riverside Retail Park, located close to the railway station, which comprises a range of commercial leisure uses, including a cinema, health and fitness club, bars, restaurants and a nightclub. However the survey results indicate that the scheme essentially functions as a car-based destination and there are limited linked trips between Riverside and the rest of the city centre.

7. ANGLIA SQUARE: QUALITATIVE ASSESSMENT

7.1 Anglia Square is situated to the north of Norwich city centre and covers an area extending from Colegate, north of the River Wensum, to the north of Magdalen Street. It is linked to the City Centre and is defined as a large District Centre in the Local Plan. It essentially consists of three distinct areas:

- the privately owned **Anglia Square Shopping Centre** built in the 1970s;
- **Magdalen Street** which is a traditional linear high street; comprising some residential properties and office uses at ground and first floor levels;
- **St Augustines Street**, which appears to function as a specialist shopping street.

7.2 Table 7.1 shows that the mix of units in Anglia Square is fairly consistent with the UK Goad national average. However, in terms of floorspace, the centre has a weak convenience offer and a high proportion of vacant floorspace. Anglia Square also has a large amount of vacant office floorspace. The Council is currently preparing an Area Action Plan (AAP) for the regeneration of the whole area north of the river.

Diversity of Uses and Vacancies

Table 7.1: Anglia Square Large District Centre Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	12	11.2	9.1	1,166	6.5	16.6
Comparison	47	43.9	46.4	9,773	54.4	51.6
Service	34	31.8	32.6	3,929	21.9	21.5
Vacant	14	13.1	10.5	3,083	17.2	8.9
Total	107	100%	100%	17,951	100%	100%

Source: Norwich City Council and GVA Grimley Survey 2007

Retailer Representation

7.3 The largest retailer in the centre is Roys of Wroxham, which is an independently operated regional foodstore operator, selling a range of ancillary non-food goods (such as clothing and household products). The centre's tenant mix comprise mainly value and discount-led retailers, including QD Variety Store, Poundstretcher, 99p Stores and Iceland. There is also a cinema on the upper floor of the shopping centre.

- 7.4 With the exception of Roys, the majority of units along Magdalen Street are small units, comprising a mix of comparison and service retailers. There is a high proportion of charity and second-hand shops, along with mobile phone shops and several niche retailers selling music, arts and sewing goods. In addition, there are also several ethnic retailers along Magdalen Street. The centre is also well known for its Indian restaurants.

Retailer Demand, Rents and Yields

- 7.5 There is no published information available on retailer demand, rents or yields for Anglia Square.

Accessibility

- 7.6 Anglia Square has extensive car parking and is easily accessible from the inner ring road. There are several surface car parks on the edge of the centre, as well as a multi-story car park within Anglia Square Shopping Centre. Buses run along Magdalen Street linking the Anglia Square to the city centre as well as surrounding residential areas and nearly all bus routes to the north of the city pass along Magdalen Street. There is a good provision of cycle parking and Anglia Square is within walking distance of Norwich city centre.

Table 7.2: Shoppers Opinions of Anglia Square Large District Centre Accessibility

	Good	Ok	Bad	Don't Know
Easy to park	34%	32%	6%	28%
Good public transport access	44%	32%	4%	21%
Easily accessible from home	62%	31%	3%	5%
Easily accessible from work	29%	16%	4%	52%

Source: In-centre survey 2007

- 7.7 Despite the car parking provision in Anglia Square, the in-centre survey results indicate that only 34% of respondents think that ease of parking is 'good'. Some 44% of respondents stated that there was 'good' public transport access, which reflects the numerous bus routes which run through the centre.
- 7.8 There are two large surface car parks on the edge of the centre on the land adjoining Anglia Square and fronting Pitt Street, Edward Street and Botolph Street (including demolition of the former Broadside Warehouse). These are allocated in the adopted Local Plan for mixed-use redevelopment with the aim of strengthening the retail function of Anglia Square as a secondary centre and linking St Augustine's Street more closely to the centre.

- 7.9 The Local Plan also states that the development of a new small supermarket, or the enlargement of an existing supermarket at Anglia Square, would be acceptable as part of such a development.

Customer Views and Behaviour

- 7.10 The in-centre survey results highlight how people use Anglia Square and their opinions of it as a place to shop and visit for a range of activities and uses. The full survey results are set out in Appendix 6, with key findings summarised in Table 7.3 below.

Table 7.3: Shoppers Opinions of Anglia Square Large District Centre

	Good	Ok	Bad	Don't Know
Range of food shops and supermarkets	33%	42%	19%	7%
Range of clothes shops	32%	27%	38%	4%
Range of other non-food shops	49%	34%	13%	4%
Number of national chains	26%	25%	34%	15%
Range of entertainment, restaurants and pubs	28%	32%	20%	19%
Range of banks and financial services	39%	32%	12%	17%
Market	32%	24%	31%	14%

Source: In-centre survey 2007

- 7.11 Respondents appear to be generally satisfied more with the range of other comparison shops in Anglia Square than the choice of food shops, supermarkets and clothes shops. For example, some 42% of respondents identified the range of food shops as 'ok', but 38% indicated the range of clothes shops as being 'bad'. This is probably explained by the range, scale and quality of the comparison goods offer in the centre, particularly benchmarked against the city centre's retail offer as a whole. Despite the provision of a cinema and several ethnic restaurants along Magdalen Street, only 28% of respondents rated the range of entertainment, restaurants and pubs as being 'good'.

Perceptions of Safety and Occurrence of Crime

- 7.12 The in-centre survey results show that in terms of perceptions of safety and security, 20% rated Anglia Square as 'good', 52% as 'ok' and some 19% as 'bad'. There appears to be a higher dissatisfaction with safety and security in Anglia Square.

Table 7.4: Shoppers Opinions Anglia Square's Safety and Security

	Good	Ok	Bad	Don't Know
Norwich City Centre	57%	30%	5%	8%
Riverside	50%	20%	18%	13%
Anglia Square	20%	52%	19%	9%

Source: In-centre survey 2007

Environmental Quality

- 7.13 Although the quality of the environment varies throughout Anglia Square, we consider that the overall environment is poor. From the outside, the Anglia Square Shopping Centre appears out-dated and in need of investment. Linkages and entrances into the Anglia Square Shopping Centre are also poor. There is a significant amount of vacant and derelict office floorspace (pictured) which detracts from the environment.



- 7.14 The environment within the shopping centre has been improved through new investment in the public realm. In the middle of the square, there is a large open square covered with a canopy (pictured). There are also relatively modern benches and street furniture.
- 7.15 Magdalen Street has the feel of a secondary retail area with mainly two and three storey buildings with some in-fill development. With the exception of Roys, the shop fascias look tired and in need of investment. The environment is also blighted by some litter and graffiti, and the presence of the St Crispins Road flyover over Magdalen Street.

Summary

- 7.16 Anglia Square District Centre principally functions as a secondary retail area to the city centre. It comprises a mix of lower order and value retailers in a poor and tired environment, which is in need of new investment and development.
- 7.17 The centre does benefit from excellent accessibility and the Council are keen to strengthen the centre and to provide stronger pedestrian linkages to St Augustine's Street. The centre is designated in the Local Plan for significant mixed use development, which we consider is needed if it is to maintain its overall vitality and viability as a shopping, leisure and business destination.
- 7.18 Appendix 10 sets out potential development opportunities for the centre. We consider that the site would be suitable for a mixed-use retail-led development, comprising new residential, leisure and office uses, in a high quality environment served by car parking and good public transport. In our judgement the commercial viability of the centre will need to be underpinned by a strong anchor food store with the necessary scale, range and quality of offer to generate frequent trips to the centre as a whole. In turn, this should benefit other shops and businesses in the centre through higher pedestrian footfall and 'linked' spending.

8. NORWICH URBAN AREA DISTRICT CENTRES: QUALITATIVE ASSESSMENT

8.1 In this section we provide a qualitative assessment of the relative role, performance and attraction of the district centres in the Norwich Urban Area (NUA). The location of these centres is shown on Plan 3 and they are as follows:

NORWICH URBAN AREA	
Norwich City Council	Broadland District Council
<ul style="list-style-type: none"> • Bowthorpe • Distillery Square/ Dereham Road • Eaton • Plumstead Road • Earlham House • Larkman • Drayton Road • Aylsham Road 	<ul style="list-style-type: none"> • Old Catton • Dussindale District Centre • Blue Boar Lane, Sprowston District Centre

8.2 In accordance with PPS6, the adopted Local Plan recognises that centres need to be supported and encouraged to serve their local residential catchments more effectively. It also aims to ensure that these centres are not detrimentally affected by out-of-centre developments in the suburbs of Norwich, or in the surrounding suburban parts of Broadland and South Norfolk.

8.3 There is very limited published information available for these centres compared to larger centres, such as Norwich City. For example we have not been able to establish current retailer requirements, retail rents and yields for these smaller district centres. Our healthchecks therefore draw on audits carried out by the client team, where available, and on our own on-site surveys conducted during February 2007. For each centre we consider the following key performance indicators:

- Location, physical characteristics and layout;
- The mix and quality of uses;
- Vacancy levels and the distribution of vacant units;
- Key retailer representation and other businesses;
- The quality of the town centre and shopping environment, including any key features;

- Accessibility; and
- The level and quality of car parking.

Norwich City Council: District Centres

8.4 Our detailed audits of district centres in the Norwich City Council area have enabled us to compare and contrast the scale and range of their retail and service facilities. This analysis is summarised by Tables 8.1 - 8.3 below, which show the retail mix, key uses and relative scale and quality of the foodstore offer in each centre.

Table 8.1: Norwich City Council District Centres Retail Composition Summary

	Total Net Floorspace (sqm)	No of Outlets	Convenience Outlets		Comparison Outlets		Service Outlets		Vacancy Rate	
Bowthorpe	3,042	16	3	19%	3	19%	10	63%	0	0%
Distillery Square/ Dereham Road	2,374	30	6	20%	10	33%	14	47%	0	0%
Eaton	2,256	16	1	6%	3	19%	12	75%	0	0%
Plumstead Road	1,936	30	4	13%	8	27%	17	57%	1	3%
Earlham House	1,529	17	4	24%	5	29%	7	41%	1	6%
Larkman	1,486	13	5	38%	1	8%	7	8%	0	0%
Drayton Road	1,291	15	6	40%	3	20%	6	40%	0	0%
Aylsham Road	1,097	22	4	18%	6	27%	12	55%	0	0%

Source: GVA Grimley/Norwich City Council
Note: Ranked by total floorspace

Table 8.2: Norwich City Council District Centres Summary of key uses

	Post Office	Anchor Foodstore	Baker	Chemist	Bank/ Building Society	Newsagents	Public House	Takeaway/ Restaurant/ Café	Hairdresser
Aylsham Road	✓	Co-op, Lidl	✓	✓	✓	X	X	✓	✓
Distillery Square/ Dereham Road	✓	Co-op	✓	X	X	X	X	✓	✓
Drayton Road	✓	Lidl	✓	X	X	✓	X	✓	✓
Bowthorpe	✓	Roys	✓	✓	✓	✓	✓	✓	✓
Eaton	✓	Waitrose	X	✓	✓	X	✓	✓	✓
Larkman	✓	Aldi	X	✓	X	✓	X	✓	✓
Plumstead Road	✓	Somerfield / Tesco Express	✓	✓	✓	X	✓	✓	X
Earlham House	✓	Somerfield	X	✓	X	X	X	✓	X

Source: GVA Grimley/Norwich City Council

Table 8.3 District Centre Foodstore Composition

Centre	Foodstore	Net Floorspace (sqm)	Opening Date	No of Checkouts
Eaton	Waitrose	2,716	1995	15
Bowthorpe	Roys	2,081	1996	30
Aylsham Road	Lidl	1,260	Unknown	Unknown
Larkman	Aldi	790	2001	Unknown
Earlham House	Somerfield	672	Unknown	5
Drayton Road	Lidl	625	1995	Unknown
Distillery Square/ Dereham Road	Co-Op	583	2006	Unknown
Aylsham Road	Co-Op	345	Unknown	Unknown
Plumstead Road	Somerfield	307	Unknown	Unknown
Plumstead Road	Tesco Express	198	2005	4

Source: GVA Grimley/ Norwich City Council/ IGD
Note: Ranked by floorspace of foodstore anchors

- 8.5 These tables and the key characteristics of Norwich City Council's district centres as shopping locations are described in more detail below.

Aylsham Road

- 8.6 Aylsham Road is located to the north of Norwich city centre on Aylsham Road. The centre faces Aylsham Road and is split into two sections either side of the junction with Woodcock Road. There are several industrial units to the rear of the centre.

- 8.7 It is the smallest district centre in Norwich in terms of its floorspace, but has 22 small units. The centre's convenience provision is anchored by a Co-op store, along with a small convenience store, a post office and a bakery. There is also a Lidl store located outside of the centre, although there are proposals to combine this within the district centre boundary. The centre has a variety of comparison units including a florist, card shop, charity shop and a chemist. There are 12 service units including five takeaways.

- 8.8 Aylsham Road's environment appears tired and would benefit from public realm improvements, such as better landscaping and street furniture, as well as investment in shop fascias. In addition, it is considered that many of the buildings could be redeveloped to improve the design of



the centre and to enhance its appearance. There was evidence of some litter in the centre on our visit.

- 8.9 There are some cycle racks to the front of the centre and there is off-road car parking in front of the shop units. The Co-op also has a dedicated car park to the rear with approximately 10-15 spaces. Buses also run along Aylsham Road into Norwich city centre. There are pedestrian crossings across Aylsham Road, linking the centre to the Lidl foodstore and surrounding residential areas.
- 8.10 Norwich Local Plan (paragraph 7.49) sets out proposals for the future expansion of the District Centre. This could take the form of development along the Aylsham Road to link the existing centre with the new Lidl store. Alternatively, some of the shops within the centre could be redeveloped to allow for a more integrated form of development near the road junction of Aylsham Road and Woodcock Road, enabling parking and servicing to be taken away from this busy road interchange. The latter development option is the preferred option set out in the Local Plan.

Distillery Square/ Dereham Road

- 8.11 Distillery Square/Dereham Road is located on the edge of the Norwich city centre along the A1074 Dereham Road. A new Co-op store has recently opened to replace the smaller older store on an adjacent site and comprises circa 583 sqm of net floorspace, along with a post office. The centre was designated as a local centre until the replacement Co-op opened and has since been re-designated as a district centre. The centre has 30 retail and service units, making it the joint largest centre with Plumstead Road in terms of number of units.
- 8.12 The new Co-op anchors the centre's strong convenience provision, which also includes a butchers and a bakers. The household survey results confirm that some 7% of respondents in zone 7 use the Co-Op for their household's main food shopping.
- 8.13 Comparison units include a number of second-hand shops and well as hi-fi/ electrical stores and a stationery shop. Services include a number of fast-food takeaways and hairdressers, as well as a launderette and bookmakers.
- 8.14 The main parking for the centre is provided by the Co-op car park and there is also dedicated cycle parking. The centre is set back from the main road and a number of the shop units are set around a small square. The centre is generally well kept with a pleasant public realm, and appears to be popular and well frequented.

Drayton Road

8.15 Drayton Road is located to the north west of Norwich city centre, at the crossroads with the A1067 Drayton Road and the A1024 Mile Cross Road. It is one of the smallest district centres in terms of its total net floorspace and number of units. It achieved district centre status when Lidl opened in 1996. It consists of two parades of retail units facing (but set back from) the crossroads, with residential units above. The Lidl foodstore is located on the opposite side of the centre.

8.16 In Drayton Road, all of the units are of a similar size and consist mainly of convenience and service uses including a Spar, bakers, newsagents, florists, dry cleaners and several takeaways. The centre does not have a bank or a chemist.

8.17 There is a limited amount of on-street car parking outside of the retail units (c.20 spaces). However, this is poorly configured and difficult to access at peak periods. Lidl has its own surface car park with c.50 spaces and there are pedestrian crossings at the crossroads allowing people to make linked trips between Lidl and the other units. There are also cycle racks outside the retail parades.



8.18 As a result of its position on a traffic interchange, the centre has mainly hard landscaping. There are no green spaces and limited planting, which we consider would help to enhance the attractiveness of the centre. However, the public realm is generally well maintained and free of litter. The three-storey red bricked buildings are generally well maintained at all levels. However some of the shop fascias appear tired and would benefit from investment.

Bowthorpe

8.19 Bowthorpe is located to the west of Norwich city centre off the A1074 Dereham Road, in the residential area of Bowthorpe. It is a purpose-built district centre dating from the 1980s and is the largest district centre in terms of its total floorspace.

8.20 The centre is anchored by a Roys superstore, which mainly sells convenience goods. Roys is the second largest foodstore in Norwich's district centres, with a net floorspace of 2,081 sqm and 30 checkouts. As a result of the presence of Roys, the centre has a much wider catchment than other district centres with much smaller foodstores. The household survey results confirm that in

Zone 5 some 6.1% of respondents visit Roys for their household's main food shopping and 17.1% visit for their top-up food shopping purchases.

8.21 The centre's convenience offer is supplemented by a bakers and a newsagent, which also contains a post-office. The centre provides a good range of local services with several multiple retailers including Boots, Hughes Electricals, Choices Video and a Coral betting shop.

8.22 Bowthorpe is based around a pedestrianised central square with the majority of units facing inwards. The centre is surrounded by a large surface car park and there is cycle parking. There are also pedestrian links to surrounding residential areas. The centre has an attractive and well-maintained public realm with attractive paving and little litter or graffiti. The buildings are all of a similar style, with red-bricked single storey buildings and covered walkways around the edge. There is a sculpture in the centre of the square (pictured) as well as some trees and box planters which enhance the overall environment. The centre also has public toilets.



8.23 We understand that an outline planning application has been approved for a retail unit at Bowthorpe (Roys), but this has not yet been implemented.

Eaton

8.24 Eaton is located to the south west of Norwich city centre. It is accessed by local roads and from the A11, which has a fly-over close to the centre. It has a mix of building types, ranging from thatched cottages to flat roofed purpose-built retail units. It has evolved from being a village settlement following several new phases of development. Despite the presence of the A11 fly-over and the mix of building types, the centre has a pleasant ambiance.

8.25 The centre is anchored by a Waitrose supermarket. Waitrose purchased and refurbished the store in the mid-1990s, which had previously been operated by Budgens since the 1980s. The store has a net floorspace of 2,716 sqm net and is served by a large surface car park, as well as pedestrian links from Eaton's traditional village high street. The store is an important anchor and attracts people to the centre



from across the survey area. The household survey results show, for example, that in Zone 4 25.8% of respondents visit Waitrose for their main food shopping and 38.4% use it for their household's top-up shopping

- 8.26 Laura Ashley and Alliance Pharmacy have concessions within the Waitrose store. Other uses in the centre include several high street banks and building societies, a dry cleaner, estate agents and a hairdresser.

Larkman

- 8.27 Larkman is situated on the A1074 Dereham Road to the west of Norwich city centre. It is essentially a linear parade of shops, which has developed alongside the A1074. The shops are set back on a slip road and are served by on-street car parking.



- 8.28 Larkman is one of the smallest district centres in terms of its total net floorspace and number of units. It was previously designated as a local centre, but was re-designated following the opening of Aldi in 2003. The Aldi foodstore anchors the centre and other national multiples include BetFred and Moss Chemists.

- 8.29 Based on our visit to the centre, we consider that its environment could benefit from improvement. The centre feels neglected, with tired looking shop fascias and there is some litter and trade waste blighting the environment. The buildings are not very attractive and there is limited public realm.

Plumstead Road

- 8.30 Plumstead Road is located along the B1140 road, on the outskirts of Norwich city centre to the east. It is a linear centre with a range of different unit types and sizes, leading up to the roundabout with the A1042.



- 8.31 It is the joint largest district centre with Distillery Square/Dereham Road in terms of the numbers of units. It comprises a strong convenience

provision, anchored by a Somerfield (pictured) and Tesco Express, as well as a bakers and delicatessen/health food shop.

8.32 The centre also has a range of comparison operators including two DIY/hardware shops, a stationers, a toy shop and a charity shop. In addition, there is a strong representation of service uses. At present, there is one vacant unit in the centre.

8.33 The centre has several different sections of off-road car parking and Tesco Express has its own car park behind its store comprising approximately 10 spaces. There are also some cycle racks located at the front of the centre. There is a mix of building types, ranging from single storey flat-roofed purpose-built units, to more traditional properties that have been converted to retail use on the ground floor. The quality of the shop fascias is mixed and it is considered that a more consistent approach would enhance the appearance of the centre.

Earlham House

8.34 Earlham is situated on the B1108 Earlham Road to the west of Norwich city centre. It is a purpose built centre and is anchored by a Somerfield supermarket which is situated in a prominent position at the front of the centre (pictured). Behind this and at right angles lies a parade of smaller shops units which lie on a gradient sloping upwards.

8.35 Within these parades, there is a mix of convenience, comparison and service uses including several charity shops, a greengrocers, butchers, off licence and several cafés and takeaways. There is one vacant unit in the precinct at present. The centre has car parking to the front of the Somerfield store, comprising approximately 15-20 spaces. There are two floors of residential units above the retail units.



8.36 Although the centre is actively trading well, with only one vacant unit, we consider that the environment needs updating. For example, there are some signs of disrepair such as peeling

paint. There is a small green area with a sculpture behind Somerfield, which breaks up what is essentially a hard landscaped area. However, this is poorly maintained.

Hall Road - Proposed District Centre

- 8.37 The Local Plan identifies the area of Tuckswood, Eaton Rise and Old Lakenham to the south of the city as having a significant population, which is not currently served by a local foodstore within easy access. To satisfy this identified need, the Council has undertaken various viability assessments. Based on these assessments, part of the former Bally Shoes site, at the junction of Sandy Lane and Hall Road, has been identified and allocated as a new District Centre in Policy SHO13.
- 8.38 It is envisaged that the proposed district centre will comprise of a foodstore of no more than 1,300 sqm net, with at least three smaller units of not more than 500 sqm net providing local services. We understand that the landowners are currently drawing up plans for the site and working with consultants on design and form to inform a future planning application.

Broadland's District Centres in the NUA

- 8.39 Table 8.4 below provides an overview of the retail composition of the district centres in the Broadland District area that fall within the defined Norwich Urban Area. The key characteristics of these centres are described in more detail in the remainder of this section.

Table 8.4: Broadland's Urban Centres Retail Composition Summary

	Total Net Floorspace (sqm)	Anchor Foodstore	No of Outlets	Convenience Outlets		Comparison Outlets		Service Outlets		Vacancy Rate	
Old Catton	1,833	Somerfield	7	1	14%	3	43%	3	43%	0	0%
Dussindale District Centre	5,312	Sainsburys	7	1	14%	2	29%	4	57%	0	0%
Blue Boar Lane, Sprowston District Centre	6,182	Tesco Extra	5	1	20%	0	0%	4	80%	0	0%

Source: GVA Grimley / Broadland District Council

Old Catton

- 8.40 Old Catton is located on the edge of Norwich's urban area to the north of the A1042 ring road. It is defined as a district centre in the Broadland Local Plan and serves a predominantly suburban residential population.

Diversity of Uses, Retailer Representation and Vacancies

- 8.41 Old Catton is a purpose-built district centre which opened in the 1960s. The centre is anchored by a 1,305 sqm Somerfield store and there is an adjoining parade of local shops, including a hardware shop, a charity shop, a pharmacy, two hairdressers and a Chinese takeaway. There appears to be vacant space above these units which is currently being used for storage, although this was unclear from our site visit.

Table 8.5: Old Catton Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	1	14	9.1	1,421	76	16.6
Comparison	3	43	46.4	286	16	51.6
Service	3	43	32.6	127	7	21.5
Vacant	0	0	10.5	0	0	8.9
Total	7	100%	100%	1,833	100%	100%

- 8.42 The household survey results show that the majority of people using the Somerfield supermarket in Old Catton live in Zone 6, from where it achieves a market share of 6.1% for 'main' food shopping trips and 21.7% for 'top-up' food shopping. It also draws shoppers from Zone 11, with 6.3% using Somerfield for their main food shopping and 13.6% for their top-up food shopping.

Accessibility

- 8.43 Old Catton has an extensive surface car park adjacent to the centre, although this was less than half full at the time of our site visit on a weekday (late morning). This could reflect the limited retail and service provision in the centre and the close proximity of neighbouring residential areas. We understand from the Council that planning permission has recently been granted for approximately one third of the car park to be developed for new residential use, which is now being implemented. In terms of its public transport, bus services also connect Old Catton with Norwich city centre and other suburban areas.

Perception of Safety and Occurrence of Crime and Environmental Quality

- 8.44 The centre's environment is generally clean and it was free of litter and graffiti at the time of our audit. However there are some signs of neglect, such as peeling paint. The public realm has been enhanced by the provision of several large box planters breaking up a hard landscaped space with greenery. Although there is some seating, this appears to be old and unused. There are good linkages from the car park to the centre, as well as to surrounding residential areas.



- 8.45 Overall, Old Catton provides essential convenience and service offer to its local population and is easily accessible from neighbouring residential areas by a range of transport modes. Somerfield supermarket is an important anchor to the centre. The centre appears to be vital and viable, as indicated by the fact there are no vacant units. However, we consider it would benefit from investment in its environment and public realm. There could also be potential to introduce living above shops.

Dussindale

- 8.46 Dussindale is located to the north east of Norwich city centre in the suburb of Thorpe St Andrew. It is designated as a district centre in the Broadland Local Plan, and can be reached by car via the A1042 Great Yarmouth Road. It is also served by several bus services, connecting the centre to Norwich city centre and surrounding residential areas.
- 8.47 It is a purpose-built district centre, which opened in the late 1980s/early 1990s and is served by a surface car park. Table 8.6 below shows that the centre's floorspace is dominated by a Sainsbury's foodstore. There are also several smaller units with retailers including Choices

Video, Barnados Charity Shop and Sharps Bedrooms. These uses are supplemented by a NHS Health Centre and a Community Centre.

Table 8.6: Dussindale Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	1	14	9.1	4,407	83	16.6
Comparison	2	29	46.4	141	3	51.6
Service	4	57	32.6	764	14	21.5
Vacant	0	0	10.5	0	0	8.9
Total	7	100%	100%	5,312	100%	100%

- 8.48 The Sainsbury's store sells a variety of non-food goods including clothing and home items which account for approximately 25% (1,102 sqm net) of the store's floorspace of 4,407 sqm net. Although this figure is not deducted from the Table 9.10, we have taken it into account in the capacity modelling exercise set out in Section 12.
- 8.49 The household survey shows that the Sainsbury's store is predominantly used for main food shopping with strong market shares in Zones 7 (29.3%), 8 (24.7%) and 9 (26.0%). In terms of top-up shopping its highest market share is in Zone 7 (25%).

Blue Boar Lane, Sprowston

- 8.50 Blue Boar Lane is located on the northern edge of the NUA on the A1151 Wroxham Road. It is designated as a potential district centre in the Broadland Local Plan, as it does not currently fulfil the role of a district centre.
- 8.51 Its retail offer essentially consists of a Tesco Extra superstore, which opened in 1988 and originally comprised 4,674 sqm net of floorspace. It was a reconfigured store from a previous local family-run outlet known as Bugden's. The store was recently extended and now comprises 6,182 sqm net of retailing of which approximately 35% (1,234 sqm net) is for non-food goods. There are several additional retail units within the store including Johnsons Dry Cleaners, Timpsons, Going Places and The Hair Shop. There is also a café, petrol station and a large car park.
- 8.52 The household survey indicates that the Tesco Extra draws main and top-up food shopping trips from across the survey area and particularly from Zones 1-10. The zones with the highest markets shares for main food shopping are Zone 3 (23.7%), Zone 7 (44.4%), Zone 8 (36.4%),

and Zone 10 (36.2%). The store also has a good market share for top-up food shopping in Zone 7 (25%).

Summary

- 8.53 The Norwich Urban Area comprises eight district centres in the Norwich City Council area along with the proposed district centre at Hall Road. It also comprises two existing and one potential district centre in Broadland District.
- 8.54 Our assessment of these centres has indicated that, in general terms, these district centres all appear to be performing relatively well. Although they vary in terms of the scale and quality of their retail offer and environments, and the catchments they serve, they are vital and viable providing a range of everyday convenience and other services. Significantly there are no vacancies in nine out of eleven of the centres, and only one vacancy each in Plumstead Road and Earham House district centres.
- 8.55 The centres are all anchored by a foodstore, albeit of different size and quality. The Tesco at Blue Boar Lane and Sainsbury's store at Dussindale District Centre are the largest foodstores, followed by Eaton (Waitrose), Bowthorpe (Roys) and Aylsham Road (Lidl). These stores sell a wide product range and are generally served by extensive car parking. They have an important role as both main and top-up food destinations for people living in a much wider catchment than those district centres with much smaller convenience stores – namely Aylsham Road (Co-Op), Plumstead Road (Somerfield) and Plumstead Road (Tesco Express). These smaller stores mainly provide essential top-up food shopping for local residents, as well as serving passing trade, and have a limited role for main food purchases. We consider that there could be the potential to improve the quantum and quality of the convenience goods floorspace in these centres to help claw back shoppers and main food spend currently going to larger foodstores in neighbouring centres and out-of-centre locations.
- 8.56 We also consider that some of the centres (Distillery Square/Dereham Road, Drayton Road and Larkman) would benefit from the provision of additional financial services such as banks. We also consider that all of the centres could be improved by the provision of more community uses, such as health centres, libraries, job centres and one-stop shops. This would enable residents to use these services locally, rather than having to travel to Norwich city centre.
- 8.57 In terms of accessibility, it is vital that short term car parking is maintained and enhanced in these centres to encourage passing trade. This is particularly the case for Drayton Road, Larkman and Plumstead Road. It is also important that the centres are accessible by a choice of transport modes and that pedestrian linkages to surrounding residential areas are maintained and

enhanced. Pedestrian crossings are also important for centres such as Aylsham Road and Drayton Road where the stand-alone foodstores are separated from the rest of the centre's shops by busy roads.

- 8.58 The centres are generally well maintained. However our assessments have identified that several of the centres (including Aylsham Road, Drayton Road, Plumstead Road, Larkman and Earlham House) would benefit from improvements to the public realm, such as hard and soft landscaping and updated shop fascias. Overall, it is important that all of the centres continue to be closely monitored to spot early warning signs of decline.

9. RURAL BROADLAND: QUALITATIVE ASSESSMENT

- 9.1 This section reviews the role, attraction and performance of the market towns of Acle, Aylsham and Reepham in Broadland District Council. The location of these is illustrated on Plan 3.
- 9.2 There is a limited range of published data sources available for these centres and no published information available on retailer demand, rents or yields. Our healthchecks therefore draw mainly on our detailed audits and site visits. Table 9.1 below summarises our findings as to the retail composition and key anchor stores in these centres.

Table 9.1: Broadland's Centres Retail Composition Summary

	Total Net Floorspace (sqm)	Anchor Foodstore	No of Outlets	Convenience Outlets		Comparison Outlets		Service Outlets		Vacancy Rate	
Acle Town Centre	2,098	Co-Op	15	3	20%	4	27%	8	53%	0	0%
Aylsham Town Centre	5,274	Budgens Somerfield	67	12	18%	24	36%	28	42%	3	4%
Reepham Town Centre	1,706	Spar	23	6	26%	6	26%	11	48%	0	0%

Source: GVA Grimley/Broadland District Council

Acle

- 9.3 Acle is located to the east of Norwich on the A47 towards Great Yarmouth, on the edge of the Norfolk Broads. It is designated as a district centre in the Broadland Local Plan (May 2006) and functions as an important shopping and service destination for its local residents, as well as catering for the passing tourist trade.

Diversity of Uses, Retailer Representation and Vacancies

- 9.4 Acle has a total floorspace of circa 2,098 sqm, comprising 15 outlets. Table 9.2 below sets out the diversity of retail and service uses across the town centre. Its offer is dominated by its service provision, which includes a range of financial services, hairdressers and beauty salons, a pub, a coffee shop and a Chinese takeaway.

9.5 Acle has a weak convenience provision, with only three such units in the town centre (namely Co-Op, a butchers and a newsagents). With the exception of the Co-Op (pictured), and the presence of several high street banks and building societies, the majority of retailers in the centre are independently operated.



9.6 Acle does not currently have any vacant units which suggest that the centre is trading well and is not susceptible to seasonal changes.

9.7 There is no data for yields or rents available due too the size of the centre.

Table 9.2: Acle Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	3	20	9.1	236	11	16.6
Comparison	4	27	46.4	491	23	51.6
Service	8	53	32.6	1,372	65	21.5
Vacant	0	0	10.5	0	0	8.9
Total	15	100%	100%	2,098	100%	100%

Accessibility

9.8 The centre has a good provision of car parking, with on street parking bays as well as a public car park. The pub and the Co-Op also have their own dedicated car parks. There is a bus shelter in the centre of the village and a limited bus service connects the centre to Norwich. It also has a train station on the Great Yarmouth to Norwich line, but this is located outside of the main settlement on the south side of the A47. Acle High School is located on the edge of the centre and the busiest times in the centre are at the beginning and end of the school day, with traffic from the school causing minor congestion at peak times.

Environmental Quality

9.9 The environmental quality of Acle is good. It has a traditional village feel being around a village green. Commercial uses are interspersed with residential properties. There is a mix of building types, with more traditional buildings in the heart of the centre - many with thatched roofs. More modern properties are located towards the edge of the centre. The majority of the buildings are two storey and there is limited commercial use of upper floors.

Overview

- 9.10 Acle is a small centre with the feel of a traditional Norfolk village. Its retail offer primarily serves the everyday convenience needs of its local population, and it also has a good provision of service outlets. Although there is a limited convenience offer in the town centre, there is an edge-of-centre Budgens supermarket.
- 9.11 Acle also serves a rural hinterland and we understand that its trade is enhanced by the presence of the High School on the edge of the centre.

Aylsham

- 9.12 Aylsham lies in the Bure Valley, approximately 25km north of Norwich on the A140 towards Cromer. It is a historic market town with a population of approximately 6,000. It provides essential services to the wider rural hinterland and surrounding smaller villages. It is located in close proximity to several popular stately homes, which attracts visitors and tourists to the area. There is also a popular weekly auction drawing visitors from beyond its more local resident catchment.
- 9.13 Aylsham is designated as a town centre in the Broadland Local Plan (May 2006). The historic character of the centre, with the Market Place at its heart, has resulted in an attractive and popular shopping destination.

Diversity of Uses, Retailer Representation and Vacancies

- 9.14 Table 9.3 sets out the diversity of retail and service uses in Aylsham town centre. It has a strong convenience and service offer (in terms of floorspace and number of units) above the UK Goad average, for its circa 1,100 centres.

Table 9.3: Aylsham Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	12	18	9.1	1,351	26	16.6
Comparison	24	36	46.4	1,378	26	51.6
Service	28	42	32.6	2,389	45	21.5
Vacant	3	4	10.5	156	3	8.9
Total	67	100%	100%	5,274	100%	100%

- 9.15 The town's convenience offer is anchored by two supermarkets namely Budgens (566 sqm net) and Somerfield (178 sqm net). The household survey results indicate that Budgens is the most popular supermarket, with more people using it in Zone 12 for both their main (13.8%) and top-up (27.8%) food shopping than Somerfield (1.1% and 8.9% respectively). Aylsham's convenience offer is also enhanced by the provision of several independent bakeries, butchers, a deli and a fruit and vegetable shop.
- 9.16 A new Tesco supermarket (1,672 sqm net) is also scheduled to open on an edge of centre site in 2008. Drawing on the results of the in-centre survey, we are able to provide a broad picture of how this could affect shopping patterns. According to the results some 46% stated that it would not affect their visits to the centre, whereas 17% stated that it would make them shop in Aylsham more often, only 9% stated that it would result in them shopping in the centre less often.
- 9.17 Aylsham's service offer includes a range of hairdressers, high street banks, estate agents, and several pubs and cafés. It has a relatively good comparison offer for a centre of its size and the town also benefits from a library and Town Hall. The majority of shops in the town are locally owned family businesses. The town has an active Traders Association, which organises events throughout the year and promotes Aylsham's retail offer. The vacancy rate is low, which indicates that Aylsham is a relatively healthy town centre.
- 9.18 The town's retail offer is supplemented by a twice weekly market on Mondays and Fridays. Its stalls sell a variety of goods, including household items, clothes, books, plants, fruit and vegetables. There is also a fish stall in the centre three times a week and a farmers market on the first Saturday of every month, comprising a variety of food and craft stalls. The markets are considered to be crucial to the overall attraction and vitality of the town centre, drawing people from the surrounding rural areas and further afield. The in-centre survey results reveal that 5% of people in the centre were visiting the market (a third of the surveys were carried out when a market was operating in the centre).

Table 9.4: Shopper's Main Purpose for visiting Aylsham

Reason for Visiting	Response
Non-food shopping	16%
Food shopping	27%
Work / business	7%
Financial services	8%
Socialising	7%
Visiting the Market	5%
Browsing	4%
Other	4%
Personal services	2%
Eating or drinking out	2%

Source: In-centre survey, 2007

9.19 Table 9.4 shows that the highest proportion of people in the centre (27%) were there for food shopping, as opposed to 16% of people who visited primarily for non-food shopping. It is therefore important that Aylsham maintains and enhances its convenience offer.

9.20 There is no data for yields or rents available due to the size of the centre.

Accessibility

9.21 In general car parking for shoppers and visitors is critical to the health of small towns, particularly market towns with a large rural hinterland such as Aylsham. The survey results indicate, for example, that 46% of interviewees had travelled to Aylsham by car. In this case the centre is well served with car parks, and has a free surface car park. There is car parking in the Market Place on non-market days (pictured), and Budgens also has its own dedicated car park. Rural bus services run through the centre from Norwich, Sheringham and Holt.

9.22 Table 9.5 below shows that 38% of interviewees consider Aylsham to have good public transport access with 13% of interviewees stating that they travel to the centre by bus. Although some 32% stated that it is easy to park in the centre, this is lower than for other Broadland and south Norfolk centres. This could indicate that more car parking spaces are required, particularly on market days when the Market Place is unavailable. However,



we understand from the Council that the station car park is much larger than necessary for the station alone and serves as an additional town centre car park. The fact that the Tesco permission is for a new store opposite the station should help to reinforce the wider role of the station car park as serving the rest of the town centre. In this context, we understand that additional new parking provision to serve Aylsham should not be required.

Table 9.5: Shoppers Opinions of Aylsham Town Centre Accessibility

	Good	Ok	Bad	Don't Know
Easy to park	32%	27%	20%	21%
Good public transport access	38%	24%	9%	29%
Easily accessible from home	55%	25%	4%	16%
Easily accessible from work	20%	21%	3%	56%

Source: In-centre survey, 2007

Customer Views and Behaviour

- 9.23 The in-centre survey results provide an indication of how people use Aylsham town centre and their perceptions of the centre's facilities and attractions. The full survey results are set out in Appendix 7 and headline findings are summarised in Table 9.6 below.

Table 9.6: Shoppers Opinions of Aylsham Town Centre

	Good	OK	Bad	Don't Know
Range of food shops and supermarkets	37%	45%	7%	12%
Range of clothes shops	17%	24%	34%	25%
Range of other non-food shops	33%	38%	9%	20%
Number of national chains	18%	30%	20%	32%
Range of entertainment, restaurants and pubs	25%	37%	10%	28%
Range of banks and financial services	51%	30%	0%	19%
Market	38%	42%	5%	16%

Source: In-centre survey, 2007

- 9.24 Respondents appear to be generally satisfied with the range of food and non-food shops in the centre, as well as the range of banks and financial services and the market. However, a significant proportion of shoppers identified the range of clothes shops and number of national chains as being 'ok' or 'bad'. Respondents also generally rated the range of entertainment, restaurants and pubs as being 'good' and 'ok'.
- 9.25 The size of Aylsham and its traditional market town heritage means that it does not have the range of shops and services available in larger centres. Indeed this is what makes Aylsham unique. It is therefore important that these results are interpreted with care.

Perception of Safety and Occurrence of Crime

- 9.26 The in-centre survey results show that in terms of safety and security, 39% rate Aylsham as 'good' and 35% as 'ok'. Only 3% rate safety and security as 'bad', which indicates that the perception of crime in the centre is low and that respondents generally feel safe.

Table 9.7: Shoppers Opinions Town Centre's Safety and Security

	Good	Ok	Bad	Don't Know
Aylsham	39%	35%	3%	23%

Source: In-centre survey 2007

Environmental Quality

- 9.27 Aylsham is an attractive centre with a good environmental quality. The Medieval street pattern has been maintained, with several narrow alleyways radiating from the Market Place. The majority of the shop fronts and buildings in the centre of the town are well maintained and the Conservation Area designation ensures that any changes are appropriate to the local architecture and landscape.
- 9.28 There are over 200 Listed Buildings in the centre and the townscape includes many historic features which have been sensitively repaired and renovated, including a 16th Century timber framed house on Red Lion Street. The Conservation Area designation has limited the potential to modernise and increase Aylsham's retail offer in recent years. However new development and investment, such as the Tesco, is occurring on the edge of the centre.

Overview

- 9.29 On the basis of the PPS6 indicators, we consider that Aylsham is an attractive, vital and viable town centre. It has a good retail and service provision, which makes it an attractive centre for the surrounding rural hinterland. Aylsham's retail offer is distinguished by the large number of local family-owned businesses and its markets. The town also benefits from tourist trade, although we consider that this could be increased by raising its profile through increased marketing and promotion, and strengthening its eating and drinking offer.
- 9.30 It is therefore important that Aylsham continues to enhance its retail and service offer, particularly through encouraging local independent traders and promoting the centre's markets and its historic environment. It will also be important to monitor the impact of the new Tesco on the independent shops and businesses in the centre.

Reepham

- 9.31 Reepham is situated between the Bure and Wensum valleys, approximately 17km north-west of Norwich on the B1145. It has the feel of a large rural village, with commercial uses interspersed with residential properties, and is designated as a district centre in the Broadland Local Plan.

Diversity of Uses, Retailer Representation and Vacancies

- 9.32 Table 9.8 below sets out the composition of retail and service units in Reepham. It is apparent that the representation of service and convenience units and floorspace is higher than the UK average (for all Goad centres). It has a more limited comparison offer, which is characteristic for

this type of a centre. There were no vacant units at the time of our audit, which is a positive sign of the relative health of the centre.

Table 9.8: Reepham Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	6	26	9.1	430	25	16.6
Comparison	6	26	46.4	441	26	51.6
Service	11	48	32.6	834	49	21.5
Vacant	0	0	10.5	0	0	8.9
Total	23	100%	100%	1,706	100%	100%

- 9.33 Reepham's convenience offer is based around a local Spar store, which is outdated and only has 175 sqm net of floorspace. There is also a newsagents/general store, two independent butchers, a greengrocers and a deli/health food shop.
- 9.34 The centre's comparison offer is specialised and includes a bridal boutique, an antiques shop and a gift shop. The centre has a range of services including a community police station and a library. A market is also held in the centre on a Wednesday.
- 9.35 There is no data for yields or rents available due too the size of the centre.

Accessibility

- 9.36 Reepham is served by a rural bus service linking the centre to Norwich. There is a car park on the edge of the centre, as well as parking in Market Square in the middle of the centre (pictured below).

Environmental Quality

- 9.37 Reepham is a very attractive and historic centre based around the 18th Century Market Place. St Mary's Parish Church is famous as it is one of only two places in Europe to have three churches on the same site. There is a variety of attractive and architecturally interesting buildings around the Market Square, including half-timbered buildings and several Georgian



buildings. The town centre is covered by a Conservation Area. It also benefits from attractive signage and traditional shop fronts, and the buildings are generally well maintained.

Overview

- 9.38 Reepham is an attractive and historic town serving a rural population to the north west of Norwich. It provides a range of everyday convenience and service outlets, as well as several specialist comparison retailers. The centre also has a good provision of community services including a library and community police station. It is very attractive architecturally and the majority of the buildings and shop fronts are well maintained and in-keeping with the historic environment. It is therefore essential that Reepham maintains and enhances its important everyday convenience and service offer, whilst protecting its unique environment and character.

Summary

- 9.39 The rural centres of Acle, Aylsham and Reepham are all attractive, vital and viable centres. They all provide essential convenience provision and services for the local communities, although Acle has a more limited convenience provision. It is therefore essential that these centres maintain and enhance their retail offer to continue to meet the day-to-day needs of local residents as well as serving their wider tourist and visitor market.

10. RURAL SOUTH NORFOLK: QUALITATIVE ASSESSMENTS

- 10.1 This section draws on and updates the findings of the 2004 Retail Study by South Norfolk District Council which comprised health checks of six centres in the District, namely Diss, Wymondham, Harleston, Loddon, Long Stratton and Hingham. In accordance with our Brief, we have only reviewed and updated the assessments of the three main centres of Wymondham, Diss and Harleston. The location of these centres is illustrated on Plan 3.

Diss

- 10.2 Diss is located just off the A140, some 32 km south of Norwich. It is the main commercial centre within South Norfolk District. The town centre is attractive and is extensively covered by a Conservation Area focused on Mere Street and the historic Mere. Much of the street pattern of the town centre reflects its historical context. To the south of the centre there are large modern retail units, which provide a contrast to the rest of the historic centre.

Diversity of Uses

- 10.3 Table 10.1 below sets out the mix of retail and service uses in Diss town centre. Its mix of units (expressed as a proportion of total units) is broadly in line with the UK average for all circa 1,100 centres covered by Experian Goad. In terms of its retail floorspace Diss has a higher proportion of convenience retailing than the UK average. This is due to the large Tesco and Morrisons convenience stores at the southern end of the town centre. The Tesco store comprises a sales area of 2,825 sqm net and Morrisons comprises 3,433 sqm net, following a 1,078 sqm net extension in September 2006.
- 10.4 In terms of its overall floorspace, the table shows that Diss has a relatively low proportion of services uses. However, we do not consider that this is necessarily a cause for concern as the centre does have a good range of essential services, including banks, building societies, takeaways, estate agents and hairdressers.

Table 10.1: Diss Town Centre Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Good)
Convenience	16	11.4	9.1	7,732	49.6	16.6
Comparison	72	51.4	46.4	6,326	40.6	51.6
Service	45	32.1	32.6	1,252	8.0	21.5
Vacant	7	5.0	10.5	266	1.8	8.9
Total	140	100%	100%	15,576	100%	100%

Source: South Norfolk Retail Study 2004 & GVA Grimley Survey 2007

- 10.5 The in-centre survey results show that the highest proportion of respondents (23%) visited the centre mainly for non-food shopping, whereas some 11% primarily visited for food shopping reasons only. The survey results confirm that Diss has an important role as non-food and fashion shopping destination which should be maintained and enhanced, particularly in the context of increasing provision in Norwich and other centres.

Retailer Representation

- 10.6 Diss has a relatively good range of multiple retailers, including Superdrug, Boots, Woolworths, WH Smith, Tesco and Somerfield. Other comparison goods retailers in the centre include clothing and footwear, electrical, chemists, pets, gifts and charity shops.
- 10.7 As highlighted above the centre has a particularly strong convenience goods provision, anchored by large Tesco and Morrisons stores, along with a smaller Somerfield supermarket, and independent greengrocers, butchers, bakers and Newsagents. The major changes in town centre retailer representation since the 2004 Retail Study have been the extension to the Morrisons (ex-Safeway) supermarket and the opening of Tesco on a site which was previously occupied by a Co-op supermarket and Godfrey DIY store.
- 10.8 The town's retail offer is further supplemented by a popular weekly Friday market. The market is combined with auctions held in the Auction Rooms on Roydon Road. There is also a farmer's market on the second Saturday of the month. The in-centre survey results show that 87% of respondents rate the market 'good' or 'ok'.
- 10.9 Diss also has some significant retail floorspace that lies outside of the town centre boundary. These include petrol filling station shops and a range of comparison goods including a DIY store, florist, motorcycle retailers, a furniture store and a garden centre. These retailers are not accounted for in the unit counts or floorspaces set out in Table 10.1.
- 10.10 In terms of leisure provision Diss has a number of pubs and restaurants throughout the centre. In-centre survey results (Table 10.4 below) show that only 3% of respondents rate the

entertainment in terms of range of pubs and restaurants as 'good'. 49% find the range 'ok' and 22% 'bad'. Leisure patterns across the study area are considered further in Section 11.

Vacancies

- 10.11 Diss has seven vacant units. This is equivalent to a vacancy rate of 5% (Table 10.1) which is below the national average of 10.5%. The vacant units comprise a net floorspace of 266 sqm, which is 1.8% of the total floorspace. This low vacancy rate is a positive indicator that Diss is a relatively healthy town centre.

Retailer Demand

- 10.12 Table 10.2 below sets out a summary of retailers looking to locate in Diss. The full breakdown is attached at Appendix 4. The comparison retailers with requirements in Diss are mainly mid-market and lower value retailers, including Edinburgh Woollen Mill, Peacocks, Size Up and Shoe Zone. The current requirements outstrip the vacant floorspace available in the centre, which would seem to indicate that there is a lack of suitable modern floorspace available for these retailers at the present time. Our audit of the centre confirmed that much of the current 'supply' in the prime shopping streets comprises smaller units.

Table 10.2: Diss Town Centre Requirements

Retail Category	No. of Units	Min. Floorspace sq m Gross	Max. Floorspace sq m Gross
Comparison	8	1,548	3,693
Convenience	2	1,068	1,440
Leisure	1	93	1,394
TOTAL	11	2,745	6,526

Source: Focus

Rents & Yields

- 10.13 Rents in Diss currently stand at around £485 per sqm, which is higher than the £430 per sqm achieved in 2003. We consider that this rental level is in line with what would be expected of a centre this size. The growth in rents is a positive sign, but could also reflect that there is a limited supply of modern large units to meet the requirements of retailers, as highlighted above.
- 10.14 Yields currently stand at 8.5% and have moved from 9% in 2005, where they had remained for the last six years. Given the size of the centre, we consider that yields are relatively healthy and the recent movement could reflect positive market interest in the centre.

Accessibility

- 10.15 Diss is located between the A140 (which is the principal north south route within East Anglia between Norwich and Ipswich) and the A1066. It is served by a railway station (albeit this is some distance from the town centre), which lies on the main Norwich to London line offering a half hourly service in both directions. The journey time to London is 90 minutes and 22 minutes to Norwich.
- 10.16 Diss is also well served by local bus services. The central bus station, located on Park Road, provides a range of services to surrounding towns and villages during the week and at weekends. Nevertheless, Table 10.3 below shows that only 6% of respondents to the in-centre survey considered Diss to have 'good' public transport access. This is far lower than the other South Norfolk towns, although over half (54%) indicated that the service was 'OK'.

Table 10.3: Shoppers Opinions of Diss Town Centre Accessibility

	Good	Ok	Bad	Don't Know
Easy to park	48%	40%	3%	9%
Good public transport access	6%	54%	10%	30%
Easily accessible from home	27%	60%	4%	9%
Easily accessible from work	9%	50%	3%	38%

Source: In-centre survey 2007

- 10.17 Car parking provision can be critical to the health and viability of small towns, particularly market towns with a large rural hinterland. Based on our assessment and the 2004 Retail Study, we consider that there is substantial car parking provision (both short and long term) throughout the centre. The largest of these car parks are associated with the town's supermarkets. In addition to the large supermarket car parks there are in excess of 400 off-street and 200 on-street car parking spaces across the town centre.
- 10.18 Generally, the off-street parking spaces are based on a 'pay-and-display' system. Table 10.3 above shows that 88% of respondents generally found ease of parking 'good' or 'ok'. This is important as 76% of people had driven to the centre on the days of the survey. This shows a high level of satisfaction with the ease and choice of car parking.

Customer Views and Behaviour

- 10.19 The in-centre survey results highlight how people use Diss town centre and how they feel about it. Full results are set out in Appendix 7, with key findings summarised in Table 10.4 below.

Table 10.4: Shoppers Opinions of Diss Town Centre

	Good	Ok	Bad	Don't Know
Range of food shops and supermarkets	36%	50%	7%	7%
Range of clothes shops	10%	47%	37%	6%
Range of other non-food shops	16%	70%	13%	1%
Number of national chains	11%	52%	28%	9%
Range of entertainment, restaurants and pubs	3%	49%	22%	26%
Range of banks and financial services	23%	61%	3%	13%
Market	27%	60%	4%	9%

Source: In-centre survey 2007

- 10.20 It is apparent that respondents are generally satisfied with the range of food shops and supermarkets in the centre, as well as the range of non-food shops. However, a significant proportion of shoppers identified the range of clothes shops (37%), national chains (28%) and restaurants and pubs (22%) as being 'bad'.
- 10.21 The size of the centre and the catchment it serves is more limited than larger centres and it will not therefore comprise the range of shops and services available in larger centres, such as Norwich. These results should therefore be interpreted with care, although our assessment does show that current retailer requirements are not being met in the centre. Also the negative response to the current provision of restaurants, pubs and other entertainment facilities could represent a potential 'gap' in the town's offer.

Perception of Safety and Occurrence of Crime

- 10.22 There is no specific data available for the occurrence of crime in Diss. However, South Norfolk as a whole generally has a low crime rate compared to the UK average. In the period January to March 2006 there were 13 offences per 1,000 of the population in South Norfolk. This is lower than the UK average (24.9 per 1,000) and Norwich (36.8 per 1,000). It is however higher than Broadland with 9.5 per 1,000 of the population.
- 10.23 The in-centre survey results show that in terms of safety and security some 39% rate Diss as 'good', 50% as 'ok' and only 2% as 'bad'. Table 10.5 shows that the proportion who rate the centre as 'good' is considerably lower than for the other two South Norfolk centres.

Table 10.5: Shoppers Opinions Town Centre's Safety and Security

	Good	Ok	Bad	Don't Know
Diss	39%	50%	2%	9%
Wymondham	56%	31%	3%	10%
Harleston	68%	24%	1%	7%

Source: In-centre survey 2007

Environmental Quality

- 10.24 Diss town centre is attractive and lies principally within a designated Conservation Area. A significant part of the town centre is pedestrianised and there are a number of attractive historical and listed buildings within the centre. There are a range of architectural styles across the centre with fine examples of Georgian, Tudor and Victorian buildings. In addition, the Mere provides an attractive back drop to the town centre. The in-centre survey results show that 45% of respondents rate the attractiveness of the centre as 'good', and 47% as 'ok'. Diss was also a recent winner of the 'Best kept market town in Norfolk'.



Overview

- 10.25 Diss is an attractive, vital and viable town centre. For a town of its size, retailer representation is good and rents and yields are healthy and showing signs of improvement. Convenience provision in the town centre is also very strong, being anchored by larger Tesco and Morrisons stores.
- 10.26 However we consider that the centre needs to maintain and enhance its comparison goods provision, as most people are visiting the centre for non-food shopping. Currently, there is a mismatch between retailer demand for space in the centre and the supply of suitable retail units.

Wymondham

- 10.27 Wymondham is located 16 km to the south west of Norwich. It is the second largest retail centre in South Norfolk, after Diss. The town centre is focussed on Middleton Street, Market Street and Market Place.

Diversity of Uses

10.28 Table 10.6 below sets out the diversity of retail and services uses in the town centre. It is apparent that the composition of units is broadly in line with the UK centre average (albeit with a far lower vacancy rate, which is discussed later in this section). In terms of floorspace there is a lower than average convenience provision and higher than average service provision. This is due to the fact that, with the exception of Somerfield



(pictured) which comprises 300 sqm net, the convenience provision in the centre is primarily small independent units. However, there is also a large modern Waitrose store, with a total net floorspace of 2,400 sqm, located approximately one mile outside of the town centre.

Table 10.6: Wymondham Town Centre Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	11	10.7	9.1	810	9.5	16.6
Comparison	47	46.1	46.4	4,488	52.9	51.6
Service	42	41.1	32.6	3,074	36.2	21.5
Vacant	2	1.9	10.5	105	1.2	8.9
Total	102	100%	100%	8,471	100%	100%

Source: South Norfolk Retail Study 2004 & GVA Grimley Survey 2007

10.29 The in-centre survey results indicate that the highest proportion of people (23%) visited the centre mainly for food shopping purposes. This is relatively high given the lack of a large anchor store, but could reflect the importance of the smaller, independent stores to the centre.

10.30 A relatively high proportion of people (17%) also visited the town for financial services (such as banks), which highlights the importance of this centre in serving the basic day-to-day needs of the local community.

Retailer Representation

10.31 Of the 102 units in the town centre, we estimate that 13 are occupied by national multiple retailers. The main multiples are Somerfield, Boots, Woolworths and Threshers. There is also a Jarrolds department store on Middleton Street, which is popular with shoppers. In most cases

(with the exception of Woolworths) the size of these multiple stores is smaller than their national average store size.

- 10.32 The majority of operators in the town are independent retailers operating from small traditional retail units. The town has a wide range of service uses including a number of high street banks, hairdressers, restaurants and takeaways. Wymondham's retail provision is enhanced by a weekly Friday market which sells a range of goods including food, ladies wear, household products, and other items. There is also a monthly farmer's market.
- 10.33 Wymondham has around 3,773 sqm net of retail floorspace located outside of the town centre boundary. This includes a Budgens and a Spar as well as a number of comparison and service units. The majority of this floorspace comprises the out-of-centre Waitrose, which is discussed in the out-of-centre section later in this chapter.
- 10.34 Wymondham has a range of restaurants and pubs throughout the centre and it would appear from the in-centre survey that respondents have mixed feelings regarding the provision. When asked how they rated the entertainment in terms of restaurants and pubs in Wymondham, 23% answered 'good', 32% 'ok' and 14% 'bad'. Leisure patterns across the study area are considered further in Section 11.

Vacancies

- 10.35 As set out in Table 10.6 above, there are only two vacant units in the town centre, which comprise a net floorspace of 105 sqm. This is very low and a positive sign of the centre's relative health. However, it also indicates that there is a lack of available modern space for retailers with requirements for the centre.

Retailer Demand

- 10.36 The only retailer with a registered requirement for Wymondham is Farmfoods, who are looking for a unit between 465 and 743 sqm. At present there are no suitable vacant units available to accommodate this specific requirement.

Rents & Yields

- 10.37 There are no published rents or yields for Wymondham. This is to be expected given the size of the centre.

Accessibility

- 10.38 Wymondham is served by the “One” trains Norwich-Cambridge service and by some Central trains Norwich-Nottingham-Liverpool services. The station is less than ten minutes walk from the town centre, and in 2006 it was the winner of the ‘Best small station’ at the National Rail Awards. Trains run once an hour to Norwich with a journey time of 22 minutes.
- 10.39 The town centre is served by a number of bus routes. Most of these cover the A11 corridor between Norwich, Thetford and Bury St Edmunds. Other regular services are to the north-west and west to Watton, Dereham and Hingham. Few services extend to the south-east, although this area is covered by the popular local authority sponsored dial-a-ride Wymondham Flexi-bus.
- 10.40 The in-centre survey results, as summarised in Table 10.7 below, show that 38% of people find public transport access to the centre ‘good’, while a further 19% found it ‘ok’. Only 8% found it ‘bad’ which is the lowest of the South Norfolk centres. The results also show that 15% of people had travelled to the centre by bus, which is the highest proportion of any of the South Norfolk centres.

Table 10.7: Shoppers Opinions of Wymondham Town Centre Accessibility

	Good	Ok	Bad	Don't Know
Easy to park	47%	30%	9%	14%
Good public transport access	38%	19%	8%	35%
Easily accessible from home	58%	19%	5%	18%
Easily accessible from work	33%	14%	1%	52%

Source: In-centre survey 2007

- 10.41 As for car parking facilities, the town is served by off-street car parks to the north and south of Market Street, as well as by Market Place. Table 10.7 above shows that 77% identified the ease of parking ‘good’ or ‘ok’. This is important as 57% of respondents had driven to the centre that day. Some 4% of people had cycled to the centre and the dedicated cycle parking in the centre appears to be well used.

Customer Views and Behaviour

- 10.42 The in-centre survey results highlight how people use Wymondham town centre and their perceptions of it as a shopping and leisure destination. Full results are set out in Appendix 7, with key findings summarised in Table 10.8 below.

Table 10.8: Shoppers Opinions of Wymondham Town Centre

	Good	Ok	Bad	Don't Know
Range of food shops and supermarkets	22%	45%	23%	10%
Range of clothes shops	11%	23%	40%	26%
Range of other non-food shops	27%	45%	18%	10%
Number of national chains	10%	32%	32%	26%
Range of entertainment, restaurants and pubs	23%	32%	14%	31%
Range of banks and financial services	57%	23%	2%	18%
Market	40%	27%	4%	29%

Source: In-centre survey 2007

- 10.43 It is apparent from the above table that respondents have mixed feelings about the range of shops and services available in the town centre. Some 23% of respondents commented that the foodstore provision is 'bad', which is far higher than in any other South Norfolk centre. Although there is a large Waitrose out-of-centre store, it is vital for the continuing vitality and viability of the town centre that it meets the day-to-day convenience needs of the local population.
- 10.44 Respondents were generally happier with the range of banks and financial services available, which is reflected in the high proportion of people visiting the centre primarily for this reason.

Perception of Safety and Occurrence of Crime

- 10.45 There is no specific data available for the occurrence of crime in Wymondham. However, South Norfolk as a whole generally has a low crime rate compared to the UK average. In the period January to March 2006 there were 13 offences per 1,000 of the population in South Norfolk. This is lower than the UK average (24.9 per 1,000) and Norwich (36.8 per 1,000). It is however higher than Broadland with 9.5 per 1,000 of the population.
- 10.46 The in-centre survey results show that in terms of safety and security 56% rate Wymondham as 'good', 31% as 'ok' and 3% as 'bad'. As shown in Table 10.9 below, the proportion who rate the centre as 'bad' is marginally higher than for the other two South Norfolk centres. However, this is not high enough to be a cause for concern.
- 10.47 When asked if there were any factors which discouraged them from visiting Wymondham in the evening, 14% of people commented that it 'feels unsafe', which is considerably higher than for both Diss (2%) and Harleston (10%).

Table 10.9: Shoppers Opinions of Wymondham Town Centre's Safety and Security

	Good	Ok	Bad	Don't Know
Diss	39%	50%	2%	9%
Wymondham	56%	31%	3%	10%
Harleston	68%	24%	1%	7%

Source: In-centre survey 2007

Environmental Quality

- 10.48 Wymondham has an attractive and historic townscape. There are no pockets of dereliction in the centre and premises are generally in a good state of repair. Based on our visits to the centre, the public realm appears to be well maintained. The town centre benefits considerably from its traditional character, form and structure. The in-centre survey results show that 62% of people rate the attractiveness of the centre as 'good', which is the highest of any of the South Norfolk centres.

Overview

- 10.49 Wymondham is a very attractive historic market town with few vacancies or other obvious signs of decline. However it is apparent from both the mix of floorspace and customer views that there is an under-provision of convenience retailing in the town centre. The Somerfield store is undersized and does not act as an adequate anchor for the centre. This is especially important considering the high proportion of people who visit the centre primarily for food shopping.
- 10.50 The in-centre survey results do highlight how important the centre is to the local community in terms of providing financial services, such as banks. It is vital for the continuing health of Wymondham that the centre continues to meet the day-to-day shopping and service needs of the local community. However, the future growth of the centre and provision of larger, more modern retail units is constrained by its historic form.

Harleston

- 10.51 Harleston is the third largest shopping centre within South Norfolk District. The retail provision is based around a triangle of roads created by Broad Street, Church Street and The Thoroughfare. Part of the town centre is covered by a Conservation Area.

Diversity of Uses

- 10.52 Table 10.10 below sets out the retail and service composition of Harleston town centre. It is apparent that in terms of both units and floorspace the centre is broadly in line with the UK town centre average. A Budgens supermarket of 743 sq m net anchors the centre's convenience floorspace. Most of the comparison units are under 100 sqm net and there are only two units in the centre of over 200 sqm net.

Table 10.10: Harleston Town Centre Retail Composition

Retail Category	Number of Units	% of Units	National Average %	Floorspace (sqm net)	% of Floorspace	National Average % (Experian Goad)
Convenience	11	13.4	9.1	1,118	22.5	16.6
Comparison	35	42.7	46.4	2,266	45.6	51.6
Service	29	35.4	32.6	1,375	27.6	21.5
Vacant	7	8.5	10.5	205	4.1	8.9
Total	82	100%	100%	4,964	100%	100%

Source: South Norfolk Retail Study 2004 & GVA Grimley Survey 2007

- 10.53 The in-centre survey results show that a quarter of respondents visited the centre primarily for food shopping. It would also appear that service businesses play an important role in the centre, with 8% of respondents mainly using personal services (i.e. hairdresser, beauty salon etc.) and 4% primarily visiting the centre for something to eat and/or drink. The results show that 28% of people in the centre visit the centre once a week or more for personal services, which is far higher than for any other South Norfolk centre.

Retailer Representation

- 10.54 The Budgens supermarket is located on Bullock Fair Close. There is limited national multiple representation, although there are a number of high street banks and professional services. The town's convenience offer also comprises a range of high quality independent convenience retailers including butchers, greengrocers, bakers and cheesemongers.
- 10.55 The comparison offer in the town is mixed, with stores selling a range of goods including furniture, electricals, clothing & footwear, pharmaceuticals, bikes, jewellery, etc. The retail offer of the town is supplemented by a popular weekly Wednesday market. There is also a monthly farmer's market at Harleston leisure centre.
- 10.56 Outside of the town centre boundary there are five retail units which are occupied by a bath and tile showroom, a factory shop, a tile showroom, a kitchen store and a motorcycle shop. These

units total 1,276 sqm of comparison goods floorspace. These units are not counted in the unit count or floorspaces set out in Table 10.10.

- 10.57 Leisure provision in Harleston is limited to two pubs and a few restaurants. When asked how they rated the entertainment in terms of restaurants and pubs in Harleston, 20% answered 'good', 42% 'ok' and 23% 'bad'. Leisure patterns across the study area are considered further in Section 11.

Vacancies

- 10.58 As Table 10.10 above sets out, there are six vacant units in the centre, comprising a total of 124 sqm net of retail floorspace. This represents approximately 2.6% of the total floorspace in the centre, which is well below UK average for all centres audited by Experian Goad. The vacant units in the centre are particularly small and dated, which may explain why they have not been let.

Retailer Demand

- 10.59 There is no registered retailer demand for Harleston. This is not unusual for a town of this size and does not, in our opinion, reflect negatively on the centre's vitality and viability.

Rents/ Yields

- 10.60 There is no published rental or yield data for Harleston. Again, this is to be expected given the size of the centre.

Accessibility

- 10.61 Harleston is located on the A143 and has an adequate provision of public transport offering a total of seven weekday and weekend bus services to surrounding towns and villages. The centre is served by 21 bus routes with destinations including Diss, Harleston, Bungay, Diss and Great Yarmouth. There is also a National Express service to London once a day.
- 10.62 The in-centre survey results show that none of the respondents used public transport to arrive in Harleston. This is surprising considering that 31% of people considered public transport access to Harleston to be 'good' or 'ok'.
- 10.63 The majority of people (61%) travelled by car to the centre, 31% walked and 6% cycled. Table 10.11 indicates that respondents are generally happy with the ease of parking, although, 13% did identify ease of parking as being 'bad', which is the highest for the South Norfolk centres. The

principal car park within Harleston town centre is at the Budgens store, which has some 140 free car parking spaces.

Table 10.11: Shoppers Opinions of Harleston Town Centre Accessibility

	Good	Ok	Bad	Don't Know
Easy to park	36%	41%	13%	10%
Good public transport access	19%	12%	22%	47%
Easily accessible from home	27%	49%	1%	24%
Easily accessible from work	14%	42%	1%	24%

Source: In-centre survey 2007

Customer Views and Behaviour

- 10.64 The in-centre survey results highlight how people use Harleston town centre and how they perceive it as a shopping and leisure destination. Full results are set out in Appendix 7 with key findings summarised in Table 10.12 below.

Table 10.12: Shoppers Opinions of Harleston Town Centre

	Good	Ok	Bad	Don't Know
Range of food shops and supermarkets	67%	24%	6%	4%
Range of clothes shops	39%	28%	31%	3%
Range of other non-food shops	54%	36%	8%	2%
Number of national chains	27%	53%	15%	6%
Range of entertainment, restaurants and pubs	20%	42%	23%	15%
Range of banks and financial services	34%	46%	3%	17%
Market	41%	32%	2%	25%

Source: In-centre survey 2007

- 10.65 It is apparent from the survey that respondents are generally very happy with the range of food stores and supermarkets. Responses are more mixed with regard to the range of clothing and other non-food shops. However, given the size of the centre we consider that the satisfaction levels are generally good. The market would also appear to be popular with respondents.

Perception of Safety and Occurrence of Crime

- 10.66 There is no specific data available for the occurrence of crime in Harleston. However, South Norfolk as a whole generally has a low crime rate compared to the UK average. In the period January to March 2006 there were 13 offences per 1,000 of the population in South Norfolk. This

is lower than the UK average (24.9 per 1,000) and Norwich (36.8 per 1,000). It is however higher than Broadland with 9.5 per 1,000 of the population.

- 10.67 The in-centre survey results show that in terms of safety and security 68% rate Harleston as 'good', 24% as 'ok' and only 1% as 'bad'. As shown in Table 10.13 the centre is rated higher in terms of safety and security than Diss and Wymondham.
- 10.68 On the other hand, when asked if there were any factors which discouraged them from visiting Harleston in the evening, 10% of people stated that it 'feels unsafe'. This is considerably higher than in Diss (2%), but lower than for Wymondham (14%).

Table 10.13: Shoppers Opinions Town Centre's Safety and Security

	Good	Ok	Bad	Don't Know
Diss	39%	50%	2%	9%
Wymondham	56%	31%	3%	10%
Harleston	68%	24%	1%	7%

Source: In-centre survey 2007

Environmental Quality

- 10.69 Harleston is an historic town benefiting from many attractive and historic buildings and an attractive Market Place. It is clean and well-kept, without any noticeable signs of significant litter, vandalism or graffiti. Within the town centre, there is evidence of environmental improvements, with up-to-date street signage and furniture. There is also evidence of a number of buildings being refurbished.

- 10.70 Overall, Harleston has a 'village-like' ambience, combining local shopping provision in an attractive setting. The centre appears to be busy and popular with shoppers. The in-centre survey results show that the vast majority of people find the centre attractive and a nice place to visit for a range of activities.



Overview

- 10.71 Harleston is an attractive and well maintained centre with a pleasant shopping environment. The Budgens supermarket acts as a strong anchor to the centre's retail offer and is supplemented by a range of high quality independent convenience retailers. The centre's retail and service offer provides for the day-to-day needs of the local community and its service businesses (personal

and eating/ drinking) play an important role in Harleston’s overall attraction. It is important that the centre also maintains and enhances its comparison retail provision if it is to maintain its current role in South Norfolk’s network of centres.

Other South Norfolk Centres

10.72 As explained in the introduction to this section, our qualitative exercise has only looked at the three centres of Diss, Wymondham and Hingham in detail. We have not considered the smaller centres of Loddon, Long Stratton and Hingham as part of this study, although the composition of these centres is summarised by Table 10.14 below. A more detailed qualitative assessment of these centres is set out in the 2004 South Norfolk Retail Study.

Table 10.14: South Norfolk Smaller Centres

	Total Net Floorspace (sqm)	Anchor Foodstore	No of Outlets	Convenience Outlets		Comparison Outlets		Service Outlets		Vacancy Rate	
Loddon	1,041	Co-op	28	5	18%	8	29%	13	46%	2	7%
Long Stratton	2,517	Budgens, Co-op	46	7	15%	15	33%	19	41%	5	11%
Hingham	1,295	Londis	20	6	30%	9	45%	4	20%	1	5%

Source: South Norfolk Retail Study 2004

Out-of-Centre Retailing

10.73 Rural South Norfolk has two significant garden centres in out-of-centre locations:

- **Highway Nurseries** in Framingham Pigot has a total combined indoor/outdoor sales area of 9,450 sqm net. This comprises a permanent indoor retail building of circa 3,660 sqm, which is conditioned to *“items and products directly associated with horticulture and agriculture and the use of the site as a garden centre”*. There is also an additional permanent building in use as a restaurant comprising some 890 sqm net, which is also permitted for retail sales,
- **Cherry Lane Garden Centre** in Pulham Market has a total sales area of 1,780 sqm which also has conditions over the class of goods to be sold.

10.74 There is also out-of-centre comparison provision at Ashwellthorpe, Cringleford, Pulham St Mary, Bixley, Earsham, Winfarthing and Hingham.

- 10.75 South Norfolk's only substantial out of centre convenience provision is Waitrose which lies approximately 3 km outside Wymondham town centre. This store opened in 2000 and comprises a total floorspace of 2,400 sqm net, including a coffee shop, petrol station and ATMs.

Summary

- 10.76 Diss, Wymondham and Harleston are all attractive, well maintained town centres. Diss is the largest of the centres and has a strong convenience provision. However we consider that the centre's comparison goods offer could be improved. This is underlined by the results of the in-centre survey which indicated that most respondents mainly visited the centre for non-food shopping.
- 10.77 Wymondham is a very attractive historic market town with few vacancies, or other obvious signs of decline. However it is apparent from both the mix of floorspace and customer views that there is an under-provision of convenience retailing in the centre. The Somerfield store is undersized and does not act as an adequate anchor for the centre. The in-centre survey results also highlight how important the centre is to the local community in terms of providing financial services, such as banks.
- 10.78 The Budgens supermarket in Harleston acts as a strong anchor to the centre's retail offer and is supplemented by a range of high quality independent convenience retailers. The centre's retail and service offer provides for the day-to-day needs of the local community. Service/businesses (personal and eating/ drinking) play an important role in Harleston's overall attraction. It is important that the centre also enhances its comparison retail provision if it is to maintain its current role in South Norfolk's network of centres.

11. COMMERCIAL LEISURE ASSESSMENT

11.1 This section describes the existing commercial leisure provision across the Norwich sub-region, and provides a broad assessment of the potential qualitative and quantitative need for new leisure uses (and floorspace) over the forecast period in Norwich City Centre, as well as the other main town centres in Broadland and South Norfolk.

Methodology

11.2 It is important to state at the outset that, in comparison with retail capacity assessments, the methodologies for assessing the quantitative need for new leisure floorspace are less developed and robust. For this reason we have used both quantitative and qualitative approaches to assess need across the three local planning authority areas and their main centres, drawing on the extensive research and evidence base.

11.3 Our approach comprises a number of different strands of research, as follows:

- An overview of national trends in the commercial leisure sector, to provide a better understanding of the relative viability and performance of the different categories (defined by PPS6 as including cinemas, restaurants, bars and pubs, casinos, nightclubs, health and fitness centres, indoor bowling centres and bingo halls). This will give a better understanding of the potential market interest and key drivers of development at the local level.
- Our detailed qualitative health checks and site visits conducted as an integral part of this study have identified the distribution and quality of existing commercial leisure provision across the sub-region, and identified any potential 'gaps' in provision (also see Plan 8 which illustrates the location of existing commercial leisure facilities across the district).
- The results of the household survey provide a more detailed picture of where people living in the defined survey zones carry out their main daytime and evening leisure activities. The survey also provides a broad indication of the retention and leakage of commercial leisure trips within the Norwich sub-region and its main centres, and the quality and attraction of competing leisure facilities across the wider study area.
- A broad brush quantitative assessment of the need for new cinema screens and A3/A4 uses, based on recently developed and accepted methodologies.

- An overview of the forecast overall growth in available leisure expenditure, based on accepted sources and forecasts. This analysis helps to place the potential growth of this sector into context.

Commercial Leisure Needs Assessment

- 11.4 The key findings of our needs assessment for the main commercial leisure uses are described below, but first we describe some of the key findings arising from the household and in-centre surveys.

(i) Leisure Attractions and Choices

- 11.5 The face-to-face interviews conducted in the seven main study centres comprised specific questions on perceptions of these centres as leisure/entertainment destinations. Table 11.1 below, for example, sets out the rating of centres in terms of their entertainment, eating and drinking offer.

Table 11.1: People's Rating of the range of Entertainment/ Restaurants & Public Houses

	Good	Ok	Bad	Don't Know
Norwich City Centre	60%	21%	2%	17%
Riverside	66%	18%	5%	11%
Anglia Square	28%	32%	20%	19%
Diss	3%	49%	22%	26%
Wymondham	23%	32%	14%	31%
Harleston	20%	42%	23%	15%
Aylsham	25%	37%	10%	28%

Source: In-centre Surveys 2007

- 11.6 The table shows that people rate the choice of facilities and attractions in the city centre and at Riverside highest, with between 60%-66% indicating that they are 'good'. Anglia Square does not rate as highly, which reflects the overall poor quality and range of its commercial leisure offer.
- 11.7 Satisfaction levels are lowest for Diss, where only 3% of people rate the choice as 'good', and 22% specifically identified it as being 'bad'. The centres of Wymondham, Harleston and Aylsham all rate fairly equally, although there would appear to be potential to increase the range and quality of their commercial leisure offer.
- 11.8 The telephone survey also asked people if there were any leisure facilities they felt were lacking within a reasonable distance from their home. The majority of people (70.7%) indicated that there was no significant lack of provision and this response was fairly uniform across the survey area.

- 11.9 However, a higher proportion of respondents in Zone 26 did indicate an under-provision of leisure facilities within South Norfolk. This suggests that there could be a qualitative need for increased access to certain leisure facilities in this area. We explore this potential gap in provision in more detail below.

(ii) Cinema Provision & Need Assessment

- 11.10 According to Dodona Research (2006), the number of new cinema screen openings has slowed significantly over recent years, following a period of dramatic growth during the 1990's. During this period there was a significant increase in new multiplex cinema developments, primarily in out-of-centre locations, either as stand-alone schemes or as anchors to leisure parks.
- 11.11 The slowdown in development is partly explained by the Government's town centres first policy, which has effectively curbed new multiplex cinema and commercial leisure developments in out-of-centre locations. Although there has been a resultant increase in investment in smaller cinemas in town centre locations, multiplexes have maintained and increased their share of cinema screens to 73% (i.e. the number of cinemas has decreased but the number of screens has increased). Research indicates that there are now approximately 200 single screen cinemas in the UK and only 16% of all screens in cinemas with less than four auditoria.
- 11.12 According to Dodona, the number of multiplex cinemas (and screens) opened in 2005 was the lowest since 1987. The latest research indicates an increase in openings in 2006, with eight new multiplexes planned comprising 64 screens. Although Dodona forecast an increase in new investment and development over the short term, the growth will continue to be modest compared with previous trends due to the increase in sophisticated home entertainment systems, digital television and other technological advances.
- 11.13 The household survey identified that some 54.8% of people in the survey area visit a cinema. Cinema trips vary across the study area, with the highest trip rate in Zone 1 (65%) and the lowest in Zone 5 (41%). Table 11.2 below shows that, at present, the UCI at Riverside is the most popular cinema, attracting 42.3% of cinema trips.

Table 11.2: Most Dominant Cinema Destinations

Cinema	Local Authority	No. of Screens	Market Share (%)
UCI, Riverside	Norwich	14	42.3
Vue, Caste Mall	Norwich	8	18.7
Hollywood, Anglia Square	Norwich	3	6.3
Cinema City, Norwich ⁽¹⁾	Norwich	1	1.9

Source: Household Telephone Survey 2007

Notes: ⁽¹⁾ Cinema City was closed for refurbishment at the time of our study and is currently operating from a theatre on a shared basis (i.e. part-time opening only).

11.14 Other cinemas that are drawing trips from within the survey area include:

- Hollywood - Great Yarmouth (4.2%);
- Hollywood - Lowestoft (3.8%),
- Hollywood - Dereham (3.8%);
- Movieplex - Cromer (3.8%); and
- Hollywood - Fakenham (2.6%).

11.15 These cinemas primarily serve their local populations and have a considerably smaller catchment than the UCI Riverside and Vue Castle Mall.

11.16 Table 11.3 sets out the population per screen in the UK, based on evidence provided by Dodona Research, benchmarked against the provision in the three local authority areas. We have then projected this forward to 2006, 2011 and 2021, based on the growth in population and the number of screens needed to serve the total population.

Table 11.3 Population Per Screen

	Estimated Population (m)	No. of Screens	Population Per Screen
UK (2006)	59.26	3,400	17,429
Norwich, South Norfolk & Broadland	0.37	26	14,231
UK (2011)	59.94	3,592	16,687
Norwich, South Norfolk & Broadland	0.38	26	14,615
UK (2021)	61.14	3,912	15,629
Norwich, South Norfolk & Broadland	0.40	26	15,385

11.17 The table shows that the national average in 2006 was 17,429 people per screen. In comparison, the average for the three local planning authority areas is 14,231 people per screen. This suggests that the current provision of screens across the study area is good and there is no demonstrable quantitative need for new cinema provision. According to our forecasts, the need for new cinema screens does not increase up to 2021.

11.18 Indeed, as Table 11.4 below shows, there is currently an estimated over-supply of around five screens across the study area

Table 11.4: Capacity for Additional Cinema Provision in Three Authorities

Year	Norwich Sub Region Authorities Population (m)	UK Population Per Screen	Cinemas Necessary to Match UK Average	Shortfall of Cinema Screens
2006	0.37	17,439	21	-5
2011	0.38	16,687	22	-4
2021	0.40	15,629	25	-1

(iii) Bingo Halls

- 11.19 Research undertaken by Mintel (2005) states that bingo has shown modest growth since 2000, despite a declining customer base. Deregulation has been the main source of growth, with bingo clubs having been allowed to offer bigger prizes and to install more gaming machines offering a larger jackpot payout.
- 11.20 However, more recent research by Mintel (2007) indicates that bingo continues to suffer from its downmarket image, which limits its appeal as a night out for the majority of consumers. Research suggests that the industry will experience a downturn in turnover in 2007. This is not necessarily as a result of the Gambling Act, but is primarily explained by the ban on smoking inside clubs, which will be UK-wide by summer 2007. The sector will also be vulnerable to impact from the increased take-up of bingo and gambling on the Internet.
- 11.21 Plan 8 shows two bingo halls in the study area. There is one bingo hall in Norwich City Centre and the other is on the Aylsham Road to the north within the built-up area. The household survey results show that some 7.2% of respondents take part in bingo in the survey area. Of the people who did take part in Bingo, 41.4% used one of the two bingo halls in Norwich. Other popular destinations were Lowestoft, Thetford and Great Yarmouth.

(iv) Ten-Pin Bowling

- 11.22 Tenpin bowling has been established as a commercial leisure activity in the UK for over 40 years, but after a period of growth in the 1980's, decline set in during the early 1990's. Since then, however, a spate of investment in new centres and refurbishments by recognised chain brands has revitalised the industry to a degree.
- 11.23 Mintel research (2006) has identified an increase in development of high-end quality venues in central locations. However, long term attraction and viability and of this sector of the commercial leisure market will depend on increasing its appeal to a wider demographic and providing a more sophisticated eating/drinking offer.

- 11.24 There are more recent signs that the concept is already beginning to evolve to generate increased customer interest and visits. For example, the *Bloomsbury Bowl Lanes* in London offers a very popular 1950's American themed bowling venue with ancillary karaoke rooms, venue rooms for hire, DJ booths, bars, small scale cinema and a venue for bands and live performers/comedy nights. This more integrated leisure/entertainment experience could represent the way forward for this sector of the market.
- 11.25 The household survey identified that 31.8% of people across the survey area partake in ten-pin bowling. There are two Bowling alleys in the study area as shown on Plan 8. 'Hollywood Bowl' at Riverside attracts some 53.2% of all respondents who go bowling and 'No 10' in Bowthorpe attracts 9.3%. Other destinations outside of the three local authorities achieving a significant market share of trips include 'Regent Bowl' in Great Yarmouth (7.0%), 'Strike Bowl' in Dereham (6.7%) and 'Family Bowl' in Lowestoft (5.4%).

(v) Health & Fitness Clubs/ Swimming Pools

- 11.26 According to Mintel's research report on UK Health and Fitness Clubs, the value of this sector increased by 62% between 1998 and 2002 (at current prices). In real terms the growth was a substantial 49%. The growth of this sector has been driven by a number of factors, including significant changes in lifestyles and resultant shift away from competitive sports towards those focused on personal health and fitness development.
- 11.27 The expansion of this sector has continued in recent years, although growth has been characterised by significant consolidation in the industry. For example, Virgin Active has recently taken control of the Holmes Place leisure clubs. The industry is forecast to remain strong throughout this decade and beyond as personal health and fitness awareness continues to develop.
- 11.28 We have assessed health and fitness club provision and usage in the Norwich sub-region. Plan 8 illustrates the distribution of the major private commercial leisure facilities across the study area. There are additional smaller private and public facilities that are not covered by this plan.
- 11.29 Norwich city centre has the greatest concentration of facilities which is to be expected given its catchment population. The household survey indicates that some 45% of respondents have visited health and fitness clubs and/ or swimming pools. Of those total respondents, Norwich is the most popular destination, with a market share of 34%. Other local centres are also popular; with Wymondham achieving a market share of total trips of 2.6%, Diss achieving 2.4% and Harleston some 1.9%. It is apparent from the survey results that gyms/ health & fitness clubs/

swimming pools have a much more localised catchment than some of the other leisure facilities such as cinemas and restaurants.

- 11.30 When respondents to the household telephone survey were asked what leisure facilities they felt were missing, the two highest responses were swimming pools (10.4%) and leisure centres (5.8%). Plan 9 illustrates the results in more detail. It shows that dissatisfaction with current leisure facilities varied across the study area.
- 11.31 Dissatisfaction levels were highest in Zones 20, 22 and 29, although these fall outside of the three local authority areas. Nevertheless, a high proportion of respondents (between 20% and 30%) in Zones 12 and 13 (Broadland District) and Zone 25 (South Norfolk District) indicated that there was the need for a leisure centre and/ or a swimming pool within a reasonable distance of their home. This indicates that there may be a qualitative need for facilities of this nature in the area.
- 11.32 Despite the strong concentration of leisure centres in Norwich, a significant proportion of respondents in the city's main survey zones (32% in Zone 1, 31% in Zone 2 and 28% in Zone 3) indicated that provision was lacking within a reasonable distance of their home. However, we advise that these results should be treated with caution, as people living in or near urban areas often expect a facility to be provided closer to them than those living in more rural areas. Thus, their interpretation and definition of "reasonable" access to facilities can be very different.
- 11.33 In terms of planning for further facilities, we advise that health & fitness clubs should be encouraged with town centres first, ideally as part of more comprehensive mixed use retail/residential schemes. The need for this type of leisure activity will also be determined by market interest and demand. An assessment of current requirements from health & fitness operators, as derived from the Retail Focus Reports, indicates that Esporta and Goals Soccer have stated requirements in Norwich. In terms of the broad floorspace requirements, this comprises between 13,935 and 17,187 sqm gross of current market demand.

(vi) Evening Economy Offer

- 11.34 According to the household survey some 40.5% of respondents visit pubs and clubs in the study area. As would be expected given the level of provision, Norwich is the most popular destination with a 41.8% market share. Within the central Zones 1-3, the city centre is achieving a significant 87% to 93% market share of trips.
- 11.35 Other centres achieving a good market share within their core zones include Wymondham (36.4% in Zone 14), Diss (41.7 % in Zone 26), Harleston (52.4% in Zone 27) and Aylsham (22.2% in Zone 12).

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- 11.36 In terms of the evening economy the telephone survey asked if anyone in the household visited Norwich city centre in the evening. In response 40% of households indicated that they do, although there is a wide variation in the frequency of visits:
- 4.6% visit three times a week or more;
 - 6.5% visit once a week;
 - 5.3% visit once every two weeks;
 - 9.7% visit once every month;
 - 7.6% visit once a quarter; and
 - 5.2% visit less often.
- 11.37 Of the 60% who do not visit Norwich in the evening, some 83.2% of these respondents indicated that they do not generally visit other evening destinations. Of the remainder, Lowestoft (2.4%) and Great Yarmouth (1.9%) achieve the next highest market shares.
- 11.38 When asked what would improve Norwich's attraction as an evening destination, some 75% identified 'nothing'. Of the remainder, the most popular improvements identified include:
- Better public transport (4.4%);
 - New/ improved theatres/ shows (3.0%);
 - Safer environment (2.2%);
 - Wide range of pubs/ bars/ restaurants (1.2%);
 - New/ improved cinema/ films (1.1%);
 - More leisure/ entertainment activities in general (1.1%); and
 - Better / cheaper parking (1.0%)
- 11.39 The household survey results also indicated that some 73.4% of respondents visit restaurants across the study area. Norwich is the most popular destination, achieving a 44% market share across the survey area with a strong market share across the entire survey area. People also visit Diss, Wymondham, Aylsham and Harleston for restaurants, but their market shares are far more localised as would be expected.
- 11.40 A relatively high proportion of people choose to travel to Norwich in the evening for a variety of leisure activities. Nevertheless, it is important that the smaller centres maintain and enhance their provision of pubs, restaurants and other attractions to maintain a healthy economy and meets the needs of their local catchment populations in a more sustainable manner. Given the size and role of these centres, they should not be expected to compete with the city centre in

terms of its larger commercial leisure and 'branded' offer, but there could be opportunities for them to develop and/or expand a specialist/niche offer.

(vii) Leisure Expenditure Projections – A3/A4 Need Assessment

- 11.41 The following summarises the overall growth in available leisure expenditure to demonstrate the extent of growth rates in this sector. We have drawn on the Experian *E-marketer Report* which provides annual consumer leisure expenditure per person on leisure and recreation goods and services (in 2005 prices). Leisure expenditure (as defined by Experian) includes recreation and sporting services, cultural services, games of chance (gambling) and restaurants/ cafés. We have then generated average spend per capita and total available spend on leisure and recreation goods and services based upon the demographic profile of the District.
- 11.42 We have taken the base position and projected available expenditure per capita leading up to 2016 assuming a long term growth rate in available expenditure of 1.4% per annum for leisure goods. This growth rate figure is from Experian Business Strategies Retail Planner Briefing Note 4.0, October 2006.

Table 11.5: Per Capita Leisure Goods Expenditure

	2006 (£)	2011 (£)	2016 (£)	2021 (£)
Norwich	1,767	1,895	2,031	2,177
South Norfolk	1,708	1,831	1,962	2,104
Broadland	1,735	1,860	1,994	2,137

Source: Experian Business Strategies, E-Marketer 2007

- 11.43 Table 11.5 shows that per capita spending varies across the three local authority areas. Norwich has the highest per capita spend and South Norfolk has the lowest.
- 11.44 Table 11.6 below applies this average per capita spend to the baseline population and projections for each local authority area.

Table 11.6: Total Leisure Expenditure (£000'S)

Local Authority	2006	2011	2016	2021	% Growth: '06-'16	% Growth: '06-'21
Norwich	219,064	238,233	258,614	281,061	18%	28%
South Norfolk	195,324	219,257	244,117	272,400	25%	39%
Broadland	224,246	251,292	280,564	313,102	25%	40%

Source: Experian Business Strategies, E-Marketer, 2007

11.45 The table shows that Broadland District currently has the highest available leisure expenditure out of the three districts. Available spend is forecast to increase from £224m in 2006 to £280m by 2016, a growth of 25%. South Norfolk is also expected to see a significant rise in available spend from £195m in 2006 to £244m in 2016, which also represents a 25% growth.

11.46 Experian figures indicate that the average person in Norwich spends £1,066 per annum in restaurants, cafés and pubs. The average for South Norfolk is £983 per capita and £1,013 for Broadland residents. Experian also project that average spend on leisure goods, such as eating out, will increase by 1.4% each year. Table 11.7 below sets out the projected growth in spend on eating and drinking out up to 2021.

Table 11.7: Expenditure Forecasts – Eating and Drinking Out

Local Authority	2006	2011	2016	2021	% Growth: '06-'16	% Growth: '06-'21
Norwich	1,066	1,142	1,225	1,313	18%	28%
South Norfolk	983	1,053	1,129	1,210	25%	39%
Broadland	1,013	1,086	1,164	1,248	25%	40%

Source: Experian Business Strategies, E-Marketer 2006

11.47 Our assessment highlights sufficient growth across the study area to sustain a circa 23% growth in the restaurant/café sector by 2016. This strong growth will primarily be directed towards town centres first, in accordance with planning policy at the national, regional and local level.

11.48 Research indicates that mixed use town centre schemes can comprise a significant quantum of A3/A4 floorspace to complement the wider retail, office and residential offer. For the purpose of our need assessment we have therefore assumed that A3/A4 uses will comprise, on average, circa 15% of floorspace in mixed use schemes.

11.49 In Table 11.8 below we forecast that the potential quantitative need for new café, restaurant and bar floorspace in each geographical area up to 2021, based on the capacity forecasts set out in Section 12.

Table 11.8: Projected Quantitative Need for New A3/A4 Floorspace (sqm net)

	2011	2016	2021
Norwich Urban Area	1,942	5,909	10,554
Rural South Norfolk	146	510	925
Rural Broadland	31	83	143

Source: GVA Grimley Retail Capacity Forecasts. Assume additional 15% of capacity for A3/A4 uses.

- 11.50 Whilst this is a relatively crude assumption, and need will clearly be determined by the level of market interest and demand, it does provides an indication of the potential quantum of A3/A4 floorspace which would be developed in the main study centres as part of any potential mixed use scheme.
- 11.51 The type of A3/A4 offer will also be determined by each centre's customer profile and the demographic profile of their catchment population. For example, the socio-economic profile of a centre's catchment area, will be an important consideration in the scale and quality of future restaurant and café provision.
- 11.52 An assessment of current requirements from A3/A4 operators, as derived from the Retail Focus Reports, indicates that Zizzi, Pizza Express, Ask and Gourmet burger Kitchen amongst others, all have stated requirements for Norwich City. In terms of the broad floorspace requirements, this adds up to a significant 3,150 – 4,464 sqm gross of current market demand.
- 11.53 As stated previously for retailer requirements, the scale and quality of current requirements should be treated with caution. Experience shows that proposals for new quality mixed use development in town centres and elsewhere will inevitably generate increase demand.

Summary

- 11.54 Our assessment of the leisure sector in the Norwich Sub-Region indicates a good provision and choice of commercial leisure facilities, including cinemas, bingo, ten-pin bowling, bars, restaurants, and health and fitness clubs. It is apparent that much of this provision is in Norwich City Centre. In comparison, neither Broadland nor South Norfolk Districts have significant commercial leisure facilities, which is to be expected given their smaller catchment populations and overall retail and town centre uses.
- 11.55 In terms of cinemas, the provision is confined to Norwich city where there are 26 screens. The number of screens is above what would be expected given the size of the population and we consider that there is no need for additional cinemas up to the year 2016.
- 11.56 The responses to the household telephone survey indicate that a relatively high proportion of respondents identified an under-provision of private leisure facilities and/or swimming pool within a "reasonable" distance of their home, although this does vary widely across the survey area. In terms of planning for further facilities, provided the market demand is there, and the sites exist, health & fitness clubs should usually be encouraged within town centres and as part of mixed use retail/residential schemes. The local planning authorities should therefore encourage opportunities for innovative leisure development to build on the existing offer.

- 11.57 In terms of restaurants and pubs, Norwich has a very strong draw across the whole of the survey area, both during the daytime and evenings. The town centres of Wymondham, Diss, Harleston and Aylsham also attract a good market share of trips from within their more local catchments.
- 11.58 Our broad quantitative need assessment for A3/A4 uses assumes that a minimum of 15% of town centre floorspace comprises cafés, restaurants and bars. Applying this proportion to the forecast capacity for new comparison goods floorspace set out in Section 12 results in the potential for 11,622 sqm net of A3/A4 retailing up to 2021. Of this 'global' forecast, we estimate that the vast majority of this (10,554 sqm net) should be accommodated in Norwich Urban Area.
- 11.59 The results of the household survey appear to indicate that improvements to the attraction of the city's evening economy would not lead to a significant increase in its market share or frequency of trips. However, improvements to public transport, the theatre offer and a safer environment were identified by a small proportion of respondents.
- 11.60 It is important that the smaller centres, as well as the city centre, maintain and enhance their provision of pubs and restaurants to encourage a healthy economy and meet the needs of their catchment populations. However, given the relative size and role of these centres, we do not consider that they will be able to compete directly with the city centre as locations for major commercial leisure uses and floorspace. There may, however, be opportunities to develop and/or expand their specialist/niche offer, to complement the city centre's role and attraction within the wider study area.
- 11.61 Our leisure expenditure projections have identified sufficient growth across the study area to sustain a circa 23% growth in the leisure sector by 2016. Given that the Government's objective is to maintain and enhance the vitality and viability of city and town centres, we recommend that the strong growth in leisure expenditure should be directed to town centres first.

12. RETAIL CAPACITY ASSESSMENT

- 12.1 This section sets out the key assumptions and projections underpinning our quantitative need (capacity) assessment of the residual comparison and convenience spend available across the Norwich sub-region to support new additional retail floorspace over the forecast period.
- 12.2 As previously explained, the spatial framework for our need assessment is based on the following broad geographical areas rather than more rigid local authority boundaries:
- the 'Norwich Urban Area';
 - 'Rural South Norfolk'; and
 - 'Rural Broadland'.
- 12.3 The main shopping locations and floorspace covered by our quantitative need assessment in these areas is illustrated by the plans in the appendices to this study and also by the floorspace schedules accompanying the modelling exercise, as set out in Appendix 8 (Tables 12-13) for comparison goods and Appendix 9 (Tables 32-34) for convenience goods retailing.
- 12.4 In order to provide robust and sound baseline evidence as part of the LDF process, we have specifically drawn on the results of the in-centre and household telephone interview surveys specifically commissioned for this study (as described in Section 1). We have also drawn on existing published data and forecasts to inform and test the sensitivity of our retail capacity assessment.

Methodology

- 12.5 In developing our methodology we have drawn on the guidance set out in PPS6, along with established best practice and our extensive experience in this field. For example GVA Grimley LLP has prepared the report that will inform the forthcoming DCLG Good Practice Guidance on *Retail/Leisure Need and Impact Assessments*. Although not yet published, this identifies the importance of regional and sub-regional strategies and sets out a number of basic guiding principles, including the need:
- for a transparent methodology;
 - to use objective and up to date data inputs;
 - to justify the use of growth rates and key assumptions used in the analysis; and
 - to identify alternative options and objective testing.

- 12.6 Our approach is based on a widely accepted step-by-step methodology, which broadly:
- Estimates the available expenditure across the study area for specific classes of goods to be sold, within the broad categories of comparison and convenience goods, as advised by PPS6 (paragraph 2.34);
 - Allocates the available expenditure to the main shopping destinations (i.e. market shares), based on the shopping patterns identified by the household survey, to determine potential existing and forecast turnover levels;
 - Applies a realistic forecast of the potential improvements in productivity in the use of floorspace for both town centre and out-of-centre retailing over time, as advised by PPS6;
 - Assesses the cumulative impact of all committed retail schemes; and
 - Forecasts the capacity for new comparison and convenience goods floorspace across the sub-region, as well as for the three spatial areas and for the major centres..
- 12.7 Our quantitative assessment forecasts the potential residual retail spend and floorspace capacity available for new retailing over five year periods (i.e. 2006 to 2011; 2011 to 2016; and 2016 to 2021). Please note that the price base for our assessment is 2005 and the capacity forecasts are cumulative.
- 12.8 However, we do advise that forecasts over more than five years can only provide a broad indication of potential growth and need, due to fluctuations in economic cycles which can have a significant impact on consumer spending (such as, for example, rising interest rates). These longer term forecasts should therefore be treated with caution. We recommend that, in accordance with best practice, local authorities regularly update the need assessment to take account of revised growth projections and new developments. This will help local authorities to make better informed development control and policy choices in the future.
- 12.9 It should also be noted that our approach only takes account of all the major comparison and convenience goods shopping destinations identified in Sections 6 – 10 of this study. The more detailed floorspace schedules agreed with the client team are set out in Appendices 8 and 9. We do not include smaller shops and stores across the study area for a number of reasons. First, it would not be possible (or reasonable) to accurately audit all the smaller comparison and convenience floorspace across the sub-region, due to timescale and resource constraints. Second, these smaller shops and stores are not identified by the results of the household survey and it is not therefore possible to allocate market shares and spend to them. Third, and most importantly, inclusion of these smaller shops and stores in the modelling exercise would not in any case have a significant impact on the forecast need for new floorspace, as capacity is largely determined by the projected growth in population and spend over time.

Study Area Definition

- 12.10 As highlighted in the introductory section to this study, we specifically commissioned NEMs Market Research Limited to carry out a household telephone survey in order to help identify current shopping patterns for comparison and convenience goods retailing in the Norwich sub-region and the study area.
- 12.11 This sub-region is a mix of densely populated urban areas, market towns and rural villages, all with varied shopping patterns. We therefore commissioned 3,000 households across 30 agreed survey zones, of an appropriate size, to cover the local level and effectively define the potential catchment areas of centres. The interviews were distributed proportionately to the population in each Zone. The study area and zones are illustrated by Plan 1.
- 12.12 The survey and questionnaire was designed by GVA Grimley, working in partnership with the client team. The interviews and data processing was undertaken by NEMs and the results were interpreted by GVA. As we state in Section 1, the methodology and timing of the surveys means that they provide both a robust and sound evidence base to underpin the Local Development Framework.

Shopping Patterns

- 12.13 The survey results identified shopping and leisure patterns of households for both convenience and comparison goods. Where necessary, the results were re-weighted by NEMs to remove responses that are not relevant to our capacity assessment (such as, for example, 'internet/mail order shopping').
- 12.14 For convenience goods, the 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 weighting, which reflects the estimated proportion of expenditure accounted for by each type. In this case we have used a weighting of 75%:25% for 'main' and 'top-up' food shopping respectively. This is widely accepted and used in retail studies. However, we consider that the weighting for 'top-up' food shopping could increase from its current 25% over the long term, particularly as the 'top four' grocery retailers are currently increasing their representation and market share in the convenience goods ('top-up') sector. The 75%:25% weighting produces a composite pattern of convenience goods spending, expressed as a market share for each destination centre or foodstore from each survey zone.
- 12.15 For comparison goods the survey comprised six questions on the specific class of comparison goods categories listed below.

- Clothes and shoes;
- Furniture, floor coverings and household textiles;
- DIY and decorating goods;
- Domestic appliances;
- Electronic/entertainment goods;
- Personal/luxury and recreational goods;

12.16 These six categories are based on the definitions used by Experian Business Strategies for comparison goods expenditure. The retail capacity assessment then uses the weighted averages derived from the survey responses for each goods type and applies this to the relevant per capita expenditure by goods type. This process establishes the pattern of spending for residents of each zone on the six specific categories of goods.

12.17 However, it is important to note that the six comparison goods categories identified for the household survey, and used for our modelling exercise, represent broad aggregations of retail spend. It is not possible for the survey to cover all the specific types of retail spend, due to time and cost constraints. Thus our approach does not specifically disaggregate spend on garden centres, builders' merchants goods, pets, glassware, etc. This approach is widely adopted and accepted, and is in accordance with PPS6 advice that realistic forecasts should be based on the broad categories of comparison and convenience goods.

Baseline Population and Forecasts

12.18 Population estimates and forecasts for each of the survey zones were derived from Norfolk County Council's estimates and projections. These are set out in detail in Appendix 8 (Table 1).

12.19 The County Council's base year population estimates and forecasts are based on figures provided by the Office for National Statistics (ONS) and are derived from the Regional Spatial Strategy's (RSS) dwelling-led forecasts. These forecasts therefore take into account the housing numbers proposed for the area in the RSS and the areas of growth have been attributed to the relevant survey zone. The RSS only allocates to Districts but in the case of the Norwich Policy Area there is flexibility between districts. It should be noted that the forthcoming Core Strategy will define locations where growth will take place and this may differ from the projections used in this study.

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- 12.20 Overall, the population of the survey area is currently estimated to be 795,674. It is forecast to grow to 819,430 by 2011, and to 841,518 by 2016. This represents a strong forecast growth of 6% between 2006 and 2016.
- 12.21 At a local level the client team has identified a number of potential different growth options in terms of the exact distribution of this new residential development. The implications of these different growth options on the need for new retail uses is discussed in more detail in Section 13.

Baseline Expenditure Estimates and Projections

- 12.22 To determine estimates of per capita expenditure for convenience and comparison goods in 2006 (at 2005 prices) we have drawn on our in-house Experian *E-marketer* system.
- 12.23 In our approach we deduct 'Special Forms of Trading' (i.e. internet-based sales, sales from vending machines, etc.) from the base year expenditure per capita figures. Based on evidence provided by Experian Business Strategies (2006), we have deducted 2.2% from convenience goods expenditure at 2006, growing to 3.5% by 2016. For comparison goods we have deducted a higher 7.5% from the average spend per capita figures at 2006, rising to 12.4% by 2016.
- 12.24 In terms of expenditure growth in the survey area, we also draw on annual growth rates provided by Experian Business Strategies. These indicate stronger growth for comparison goods retailing than for convenience goods. This reflects historic trends and the fact that the propensity to purchase and consume more food is significantly more limited than the scope to purchase non-food goods. In this case we have tested a growth rate of 0.7% per annum for convenience goods expenditure and 3.8% per annum for comparison goods.
- 12.25 However, it is important to state that these expenditure projections are regularly updated and revised, with resultant impacts on the residual spend and floorspace capacity forecasts. We therefore recommend that the local planning authorities regularly monitor and update the retail capacity forecasts to take account of any significant revisions to the expenditure projections.
- 12.26 We have generated convenience and comparison expenditure by zone to highlight variations across the survey area and obtain more accurate turnover estimates. In order to place the spend per capita figures in context, we have compared the average spend in each of the three local authority areas with the national average (Table 12.1).

Table 12.1: Per Capita Expenditure – UK and Norwich Sub-region Comparison 2006

	Survey Area Zones 1-30	UK Average	Norwich	South Norfolk	Broadland
Comparison	£2,825	£2,766	£2,796	£2,939	£2,982
Convenience	£1,613	£1,586	£1,604	£1,664	£1,629

Source: Experian E-Marketer Business Strategies (also see Appendix 8, Table 2).

- 12.27 It is clear that spending potential on comparison goods is stronger than the UK average in each district, although the table shows that South Norfolk and Broadland are considerably higher. These figures reflect the relative above average socio-economic characteristics of each area's population. The full breakdown in expenditure per zone is set out in Table 2 of Appendix 8.

Expenditure Growth, 2006 - 2021

- 12.28 The next stage of the model applies the projected average expenditure estimates to the population forecasts. Table 2 (Appendix 8) shows that total available convenience goods expenditure within the survey area is currently £1,263m. This is forecast to grow to £1,330m by 2011; £1,413m by 2016; and £1,502m by 2021. This represents an overall growth of £153m (+12%) between 2006 and 2016, and £239m (+19%) between 2006 and 2021.
- 12.29 Total comparison goods expenditure available in the catchment area in 2006 is approximately £2,154m, and this is forecast to increase to:
- £2,543m in 2011;
 - £3,134m in 2016; and
 - £3,877m by 2021.
- 12.30 This represents a total projected growth of £976m (+45%) between 2006 and 2016, and £1,722m (+80%) between 2006 and 2021. The growth in total available comparison goods expenditure is therefore significantly greater than for convenience goods retailing. This will impact on the retail capacity forecasts, as described below.

Comparison Goods Turnover Performance

- 12.31 Using the composite market shares derived from the household survey, and applying these to the baseline expenditure estimates by zone, we are able to calculate the comparison and convenience goods turnover of the Norwich sub-region centres and out-of-centre retail provision.

12.32 This step in the methodology provides an objective measure of the current performance and role of each centre in the sub-region, based on the survey and research evidence detailing each centre's potential market share. The turnover figures take into account trade 'retention levels' and 'leakage', as derived from the household survey.

12.33 Table 12.2 highlights the comparison goods turnover in each of the geographical areas. These estimates are based on current trading patterns and include all town centres and out-of-centre comparison goods floorspace identified in each area.

Table 12.2: Comparison Goods Turnovers

	Turnover at 2006 (£000)	Market Share from Survey Area	Floorspace (sqm net)	Sales Density (£ per sqm)
Norwich Urban Area	1,126,862*	49.3	261,468	4,310
Rural South Norfolk	55,576	2.6	16,015	3,470
Rural Broadland	7,721	0.4	2,311	3,342

Source: Appendix 8

Note: * Includes 6.4% inflow from beyond the survey area derived from the in-centre survey

12.34 Table 12.2 shows that the Norwich Urban Area comprises the greatest quantum of floorspace and achieves the highest turnover across the study area. We estimate that the urban area retains some 49.3% of all spend across the total survey area (as shown on Plan 1). Neither South Norfolk nor Broadland rural areas achieve a significant market share from within the survey area due to their more limited retail floorspace and offer.

12.35 Table 12.3 below sets out the estimated comparison goods turnover of the larger centres in the study area at 2006.

Table 12.3: Comparison Goods Turnover by Centre

Centre	Local Authority	Turnover at 2006 (£000)	Floorspace (sqm net)	Sales Density (£ per sqm)
Norwich (including Riverside) ¹	Norwich	1,012,944	190,486	5,318
Diss	South Norfolk	37,585	7,032 ²	5,345
Harleston	South Norfolk	5,742	2,266	2,534
Wymondham	South Norfolk	12,248	4,488	2,729
Aylsham	Broadland	6,671	1,378	4,841

Source: Appendix 8

Note: (1) Includes 6.4% inflow from beyond the survey area derived from the in-centre survey.

(2) Includes comparison goods floorspace in Tesco

12.36 The table shows that Norwich City Centre achieves a high turnover. The forecast turnover for the city centre also takes account of the findings of the in-centre survey, conducted during late January and February 2007, which indicated that some 6.4% of respondents lived outside of the identified study area (i.e. beyond Zones 1-30). Although this inflow of shoppers and spend will

fluctuate throughout the year, particularly during the peak holiday periods, we consider that the trade draw identified by the in-centre survey represents a robust and sound assessment of average year-round trade draw patterns.

12.37 The table shows that applying the city centre's estimated turnover to its net floorspace results in an average sales density of some £5,318 per sqm. Although there is no published information on the turnover levels achieved by different types of UK centres, we consider that this average sales density (as derived from the survey results) does represent a robust and realistic turnover performance for Norwich City Centre as a whole. Based on our experience, this average turnover level is broadly in line with expectations based on the critical mass, quality and attraction of the city's retail offer.

12.38 In our judgement the derived average sales densities for Diss and Aylsham are higher than would normally be expected, given the scale and quality of their retail offer. However, we consider that these higher average sales densities are probably be explained by the following:

- First, the responses to the household survey for Diss did not distinguish between the town centre and out-of-centre shopping locations for non-food purchases. We therefore consider that the market share and derived comparison goods expenditure for the town centre is on the high side, as it should also include the out-of-centre retail floorspace along Park Road and Victoria Road. Combining the town centre and out-of-centre floorspace would effectively reduce the derived average sales density to a more realistic level.
- Second, although respondents to the household survey indicated that they visit Diss and Aylsham regularly for purchases, it is clear that they spend the largest proportion of their comparison goods expenditure in Norwich, albeit on less frequent trips (such as at Christmas and for special occasions).

12.39 For these reasons we consider that the turnover levels of both Diss and Aylsham should be lower than estimated. Nevertheless, to ensure consistency in our approach we have not adjusted the estimated market shares and turnovers of these and other centres at the base year. It is important to restate at this point that the base year turnover estimates do not impact on the forecast need for new comparison goods floorspace over the study period. This is because capacity is largely determined by the projected growth in population and expenditure, along with new commitments and potential adjustments to market shares.

12.40 In addition to the town centres, there is a network of out-of-centre comparison goods retail warehousing throughout the study area (see Plan 7). On the basis of the market shares derived from the household survey, we estimate that retail warehousing in the Norwich Urban Area (Hall

Road, Sweet Briar, Longwater and Sprowston Retail Parks) is currently achieving a comparison goods turnover of £82.3m. Based on the estimated retail floorspace of approximately 50,123 sqm net (Appendix 8 Table 13), this results in a total average sales density of £1,641 per sqm.

12.41 The latest research by Mintel broadly sets out the company average turnovers of the different retailers currently trading from this out-of-centre floorspace. Drawing on this research, we estimate that the NUA's retail warehouse floorspace should be achieving a composite average sales density of £2,371 per sqm (Appendix 8 Table 13).

12.42 Our assessment therefore indicates that retail warehousing in the NUA is trading below company averages. Closer examination indicates that Longwater is effectively "dragging" down the average turnover. The company average data suggests that the Longwater retail park should be achieving a total turnover of circa £14.6m whereas the survey-derived market shares result in a turnover of just £2.3m. However, we do not necessarily consider that Longwater retail park is under-trading to this extent for the following reasons:

- First, three out of the four retailers trading on the retail park (i.e. Pets at home, Staples and the Lighting Centre) do not directly correspond with the Experian categories (around which our telephone questions are based). As a result these categories of retailing do not feature heavily in the survey results. For example, although we account for spend on pets, we did not specifically ask where people purchase pet products as it would be impractical to ask about every type of product separately.
- Second, although people visit the retail park it may not be the place where they do "most of their shopping" for any one class of goods. This also means that it would not feature in the survey results.

12.43 Notwithstanding these caveats, three of the seven units in Longwater retail park were vacant at the time of our surveys. Furthermore, two of these units have been vacant since the park opened.

12.44 The survey results show that the other three retail warehouse parks are trading well. For example, Hall Road and Sweet Briar are trading at £30.4m and £27.7m per annum respectively, which is slightly above company averages. Sprowston is trading at £20.4m per annum which again is broadly in line with company averages.

12.45 There are also a number of solus retail warehouses. The Boundary Road B&Q was the only one of these to feature in the household telephone survey, as the B&Q on Hall Road was not open at the time of the survey. The results indicate that the B&Q is achieving a turnover in the region of £31.6m. Based on Mintel's company average sales estimates, we estimate that a B&Q store of

this size could be expected to achieve a turnover in the region of £16m. On this basis the store would appear to be trading significantly above its company average.

Convenience Goods Turnover Performance

12.46 As for comparison goods, we have modelled shopping patterns and the potential turnover performance of all existing town centre and out-of-centre convenience goods floorspace. Using the composite market shares derived from the household survey, and applying these to the baseline expenditure estimates, we are able to derive convenience goods turnover estimates. We have then benchmarked the modelled sales performance of the major foodstores identified with the expected turnover derived from company average.

12.47 Table 12.4 sets out the sales performance of each of the areas. The table also compares the turnover and average sales derived from the survey with the company average sales densities of the stores in each area based on Mintel *Retail Rankings*. A more detailed breakdown is set out in Appendix 9.

Table 12.4: Convenience Goods Turnover

	Turnover at 2006 (£000)	Convenience Floorspace (sqm net)	Sales Density* (£ per sqm)	Company Average Sales densities (£ per sqm)
Norwich Urban Area	399,700	41,705	9,584	8,720
Rural South Norfolk	80,782	12,684	6,368	7,869
Rural Broadland	11,879	3,409	3,485	3,255

Source: Appendix 9

Note : *Sales density derived from household survey market share estimates

12.48 The table shows that, overall, the stores in the Norwich Urban Area could be slightly over-trading benchmarked against company averages, as are the stores in Rural Broadland. In comparison stores in Rural South Norfolk appear to be slightly under-trading.

12.49 Tables 12.5 to 12.7 below summarises the performance of the main town centre and out-of-centre stores in each area based on our modelling exercise, benchmarked against their expected company averages. A more detailed breakdown of these turnover estimates can be found in Appendix 9 (Tables 32 - 34).

12.50 For example, Table 12.5 indicates that the urban area's convenience goods floorspace is trading well and generally above company averages. However, the majority of this turnover is derived from the edge-of-centre Morrisons store at Riverside and the Sainsbury's store at Brazen Gate. The turnover estimates indicate that Anglia Square is trading poorly, which is to be expected given the relative lack of a major food anchor.

Table 12.5: Norwich Urban Area Convenience Goods Turnover

Centre/ Store	Turnover at 2006 (£000)	Convenience Floorspace (sqm net)	Sales Density (£ per sqm)	Company Average Sales densities (£ per sqm)
Norwich City Centre (Inc Morrisons and Sainsburys)	105,769	12,105	8,738	8,443
Anglia Square	2,937	1,270	2,312	4,335
District Centres	34,716	9,022	3,848	5,656
Out-of-centre*	152,881	10,706	14,279	10,695
Blue Boar lane, Sprowston (Tesco)	59,396	4,018	14,782	12,435
Dussindale, Thorpe St Andrew (Sainsburys)	35,882	3,305	10,857	10,152
Old Catton (Somerfield)	5,838	1,175	4,969	6,332

Source: Appendix 9

* Tesco Harford Bridge, Lidl Aylsham Rd, Asda Hellesdon, Sainsburys Longwater, Budgens, Drayton

- 12.51 Table 12.6 shows that the convenience goods floorspace in most of the Rural South Norfolk town centres appears to be trading well and above company averages. Please note that the floorspace identified by the table is for the defined town centres only and does not include retail floorspace in edge and out-of-centre locations (such as in Diss for example). Hingham, Long Stratton and Diss are trading slightly below company average figures. It is apparent that all the Broadland urban centres, with the exception of Old Catton, are performing well. Our estimates (benchmarked against company averages) also suggest that Blue Boar Lane could be overtrading by circa £10m.
- 12.52 The table also shows that out-of-centre floorspace in Rural South Norfolk is trading below company averages. In our experience this is not unusual for stores in rural locations with more limited catchment areas. For example, although the Waitrose store in Wymondham appears to be under-trading, this suggests that it could potentially support a higher turnover. This is relevant to our consideration of the potential residential growth options and allocations in Section 13.

Table 12.6: Rural South Norfolk Convenience Goods Turnover

Centre/ Store	Turnover at 2006 (£000)	Convenience Floorspace (sqm net)	Sales Density (£ per sqm)	Company Average Sales densities (£ per sqm)
Diss	51,058	6,511	7,842	9,756
Harleston	5,605	1,118	5,013	2,874
Wymondham	3,685	810	4,549	3,256
Long Stratton	2,642	1,023	2,583	4,581
Hingham	1,080	495	2,182	3,226
Loddon	1,073	282	3,805	3,103
Out-of-centre*	17,354	2,445	7,097	9,008

Source: Appendix 9

Notes: * comprises Budgens (Poringland) and Waitrose (Wymondham)

- 12.53 Table 12.7 below sets out the performance of Rural Broadland’s convenience goods floorspace. The importance of the convenience provision in the rural centres of Aylsham, Acle and Reepham is also demonstrated by the results of the modelling exercise, which show existing stores to be trading well, particularly in Aylsham.

Table 12.7: Rural Broadland Convenience Goods Turnover

Centre/ Store	Turnover at 2006 (£000)	Convenience Floorspace (sqm net)	Sales Density (£ per sqm)	Company Average Sales densities (£ per sqm)
Aylsham	8,271	1,351	6,122	3,952
Acle	1,125	236	4,767	3,915
Reepham	1,556	429	3,627	3,547
Out-of-centre (Budgens Acle)	927	556	1,667	3,315

Source: Appendix 9

- 12.54 The floorspace and detailed breakdown of provision in each town centre and out-of-centre location is set out in detail in Tables 10 - 31 of Appendix 9. The trade draw of the convenience stores in each town centre is made up of both ‘main’ and ‘top-up’ food shopping.

Baseline Capacity Forecasts

- 12.55 Building on the baseline position, we have modelled the residual convenience and comparison goods expenditure available to support additional new retail floorspace, after taking account of existing commitments. In this case we have first assessed retail capacity at the ‘global’ level (i.e. comprising the Norwich sub-region), and have then considered capacity for each area and for the major centres in these areas. This assessment will enable each local planning authority to make informed policy choices about where growth and capacity should be met, depending on a range of other considerations including site availability.
- 12.56 We set out the findings of our retail capacity assessment for comparison and convenience goods retailing below.

Comparison Goods

- 12.57 Our assessment of the residual spend available to support new comparison goods retailing over the forecast period, to 2016 and 2021, is underpinned by a number of key assumptions, including the following:
- First, we assume a higher average sales density for new comparison goods retailing of £5,500 per sqm at the base year for the Norwich Urban Area floorspace to reflect the relative

scale and quality of its retail offer. For the rural centres we have assumed an average sales density of £3,000 per sqm.

- Second, we have included the major commitments identified by each local planning authority (see Appendix 8).
- Third, we have assumed a +3.8% per annum expenditure growth rate, for the reasons described above.
- Fourth, in accordance with PPS6 advice, we have also assumed a +2% per annum floorspace 'productivity' (or 'efficiency') growth rate for existing comparison goods floorspace, both in-town and out-of-centre. We consider that this level of growth is reasonable and robust, as it is needed to help maintain and enhance the vitality and viability of existing centres. However, we do acknowledge that this growth rate could be higher and/or lower for specific centres and shopping locations, depending on their overall health and performance.
- Fifth, we have assumed that base year market shares will remain constant over the study period. Nevertheless, we accept that market shares can rise and/or fall depending on the location, scale and quality of new comparison goods retail development.
- Finally, given that the average sales densities for centres are broadly in line with our expectations, we have necessarily assumed equilibrium at the base year (2007). In other words, we have assumed that centres are not currently under or over trading, and that there is therefore no 'pent-up' capacity at the base year.

12.58 The Government's advice in PPS6 (paragraph 2,.34) is clear that quantitative need assessments should comprise a realistic assessment of the forecast expenditure for specific classes of goods to be sold, within the broad categories of comparison and convenience goods. It is not recommended to disaggregate these broad retail categories into 'finer' spend groups, as PPS6 is clear that these specific classes of goods and spend should be directed to town centres first in accordance with the sequential approach. It is therefore an accepted approach to assess the capacity for specific classes of goods (such as electrical and DIY/ bulky goods) as part of the broader comparison goods spend category. However, please note that the household survey results do provide a more detailed breakdown of market shares for the six main categories of comparison goods spend, which are then used to determine the overall allocation of spend to centres and stores (also see paragraphs 12.15 - 12.17).

12.59 For the reasons set out earlier in this section, we have tested a +3.8% per annum expenditure growth rate for comparison goods over the study period based on Experian Business Strategies' forecasts as set out in their '*Retail Planner Briefing Note 4.0*' (October 2006). This Briefing Note also provides a growth forecast for 'bulky goods' (i.e. DIY / furniture and floor coverings / major

household appliances / and audio-visual equipment) of +4.2% per annum. Although this growth forecast is slightly higher than for 'all' comparison goods retailing, the 'bulky' goods retailers generally trade at lower average sales densities. This slightly higher growth could therefore represent an opportunity for above average 'efficiency' growth from existing floorspace and stores. The 'need' for 'bulky' goods floorspace should therefore still be seen as part of the overall comparison goods need and be subject to the key policy tests set out in PPS6

12.60 Table 12.8 below sets out our residual spend and floorspace capacity forecasts for each area.

Table 12.8: Residual Comparison Goods Expenditure and Floorspace capacity by District

	2011	2016	2021
RESIDUAL SPEND (£000s)			
Norwich Urban Area	78,610	264,121	520,828
Rural South Norfolk	3,216	12,444	24,900
Rural Broadland	693	2,029	3,861
TOTAL:	82,518	278,594	549,588
FLOORSPACE CAPACITY (net sq metres)			
Norwich Urban Area	12,945	39,395	70,361
Rural South Norfolk	971	3,403	6,167
Rural Broadland	209	555	956
TOTAL:	14,125	43,352	77,484

Source: Appendix 8

12.61 Our 'global' capacity estimates project the need for 14,125 sqm net of additional new comparison goods floorspace by 2011, increasing to 43,325 sqm net by 2016. The capacity at 2021 is projected to be some 77,484 sqm net. The table shows that the Norwich Urban Area accounts for the majority of the projected capacity for new comparison goods retailing.

12.62 Table 12.9 below sets out the capacity projections for the main town centres. As stated above, this assessment is based on constant market shares and trading draw patterns over the forecast period. The capacity arising in a specific centre does not necessarily mean that the identified capacity should be met within that centre. For example, in some cases, a more appropriately located site in a nearby centre may encourage more sustainable travel patterns. We do, however, set out capacity by centre to indicate the general location of where need should be met in the first instance.

Table 12.9: Comparison Goods Floorspace capacity by Town Centre

Centre	Local Authority	2011	2016	2021
Norwich (incl. Anglia Square)	Norwich	16,147	40,001	67,918
Diss	South Norfolk	982	2,631	4,492
Harleston	South Norfolk	149	398	682
Wymondham	South Norfolk	326	860	1,478
Aylsham	Broadland	181	481	829

Source: Appendix 8

Comparison Goods Capacity Scenario Testing

- 12.63 In line with good practice, we have also drawn on published data sources and our experience elsewhere to test a series of growth scenarios which influence the need and capacity of future retail space. In modelling the baseline capacity figures above we have assumed a 3.8% per capita expenditure growth per annum and applied a 2% per annum sales 'efficiency' ('productivity') on existing and committed floorspace, in both town centre and out-of-centre locations. Although these figures are in line with the current Experian guidance, we have also tested different growth scenarios to enable the three authorities to be somewhat flexible to changing economic circumstances over the LDF period when making policy and development control decisions.
- 12.64 One growth variable that we have tested is the sales 'efficiency' ('productivity') growth of existing floorspace, as this will help to establish the sensitivity of capacity forecasts to changes in this growth rate. One of the main drivers of expenditure growth on comparison goods has been growth in the value, as opposed to volume of purchases. A good example is high value flat screen televisions replacing lower value, higher bulk predecessors. As a consequence, it would not be appropriate to translate the forecast growth in comparison goods retail sales directly into a need for additional floorspace. An allowance must be made for existing space to grow in turnover.
- 12.65 In reality a higher growth in expenditure is likely to result in a stronger growth in sales efficiency, and a lower growth in expenditure is likely to result in weaker growth in sales efficiency. On this basis, we consider 4.3% expenditure growth/1.5% sales efficiency and a 3.8% expenditure growth/2.5% sales efficiency are unrealistic scenarios. When planning for the LDF period, we consider that the most realistic scenarios are the following:
- **Scenario 1: 3.8% growth / 1.5% sales efficiency**
 - **Scenario 2: 3.8% growth / 2% sales efficiency**
 - **Scenario 3: 4.3% growth / 2% sales efficiency**

- **Scenario 4: 4.3% growth / 2.5% sales efficiency**

12.66 Table 12.11 below sets out the results of using different expenditure growth rates and sales efficiencies. It is apparent that the various scenarios do have some impact upon the level of growth forecast. For example, Scenario 4 represents the most conservative growth scenario and forecasts a total floorspace need across the three areas of 14,135 sqm net by 2011. In comparison, the highest growth scenario (Scenario 3) results in a total capacity of 20,354sqm net. This represents a difference in the forecast capacity of 6,219 sqm net at 2011.

12.67 Nevertheless, we still consider that the baseline scenario (Scenario 2 in this case) provides the most appropriate capacity forecast based on current guidance. Also, even if average expenditure growth forecasts were revised upwards to nearer 4.3%, we consider that sales efficiencies could also increase to circa 2.5% (i.e. Scenario 4). When comparing these two scenarios in Table 2.11 there is very little difference between the two (i.e. just 22 sqm net by 2021). Therefore we are confident that the capacity projections for the baseline scenario are robust and sound in this case.

Table 12.11: Headline Comparison Goods Floorspace Capacity across the Study Area

Scenario		2011	2016	2021
SCENARIO 1:	Norwich Urban Area	18,601	52,180	92,146
	Rural South Norfolk	1,468	4,532	8,093
	Rural Broadland	278	712	1,226
	TOTAL	20,348	57,424	101,465
SCENARIO 2:	Norwich Urban Area	12,945	39,395	70,361
	Rural South Norfolk	971	3,403	6,167
	Rural Broadland	209	555	956
	TOTAL	14,125	43,352	77,484
SCENARIO 3:	Norwich Urban Area	18,610	52,186	92,135
	Rural South Norfolk	1,466	4,530	8,090
	Rural Broadland	278	712	1,226
	TOTAL	20,354	57,429	101,450
SCENARIO 4:	Norwich Urban Area	12,957	39,415	70,383
	Rural South Norfolk	969	3,402	6,167
	Rural Broadland	209	555	956
	TOTAL	14,135	43,372	77,506

Convenience Goods

12.68 Our assessment of the residual spend available to support new convenience goods retailing over the forecast period, to 2021, is underpinned by a number of key assumptions, including the following:

- First, we assume a 'high' and 'low' average sales density for new convenience goods retailing of £12,000 per sqm and £4,000 per sqm respectively in 2006. The higher average sales density broadly reflects the company averages of the major foodstore operators (such as Tesco and Sainsbury for example), whereas the lower figure is broadly equivalent to the performance of smaller supermarket and discount retailers (such as Somerfield and Aldi).
- Second, for the reasons described above, we have tested an expenditure growth rate of +0.7% per annum.
- Third, we have assumed a 'productivity' growth rate for convenience goods retailing of +0.3% per annum, in accordance with Experian Business Strategies and PPS6 advice.

12.69 Table 12.12 below illustrates the floorspace capacity for new convenience goods retailing up to 2021 based on the key assumptions to our model. A more detailed breakdown of these figures are set out in Appendix 9.

Table 12.12: Convenience Goods Floorspace Capacity by Local Authority (sq m net)

	2011		2016		2021	
	£4,000 per sq m	£12,000 per sq m	£4,000 per sq m	£12,000 per sq m	£4,000 per sq m	£12,000 per sq m
Norwich Urban Area	10,702	3,567	15,596	5,199	20,942	6,981
Rural South Norfolk	-	-	-	-	-	-
Rural Broadland	-	-	-	-	-	-

Source: Appendix 9

12.70 Due to the under trading of existing food stores, the limited forecast spending growth and the current level of commitments, we forecast that there is no capacity for new convenience goods floorspace in either Rural South Norfolk or Broadland over the next 15 years.

12.71 Table 12.13 below confirms that there is some capacity for new retail floorspace in the City Centre. Comparisons with Table 12.12 show that there is greater forecast capacity for the Norwich Urban Area than for the City Centre. This is explained by the fact a high proportion of capacity across the wider Norwich Urban Area is derived from out-of-centre stores, as well as from convenience goods floorspace in the District Centres.

Table 12.13: Convenience Goods Floorspace Capacity by Town Centre (sq m net)

Town Centre	2011		2016		2021	
	£4,000 per sq m	£12,000 per sq m	£4,000 per sq m	£12,000 per sq m	£4,000 per sq m	£12,000 per sq m
Norwich (Incl. Anglia Square)	411	137	1,618	539	2,970	990
Diss	-	-	-	-	-	-
Harleston	664	221	741	247	820	273
Wymondham	305	102	355	118	407	136
Aylsham	-	-	-	-	-	-

Source: Appendix 9

- 12.72 It should be noted that these projections are based on constant market shares over the forecast period. They do not, therefore, take account of changing shopping patterns arising from new development. For example, the table shows that there is no forecast capacity for Aylsham after taking account of the turnover of the planned new Tesco store. However, when this store is trading it will alter shopping patterns in the Aylsham's catchment and could therefore potentially generate further capacity.
- 12.73 It must also be noted that these capacity figures are derived from the under/ over trading of existing stores, as well as population and expenditure growth. This means that convenience capacity can be derived from out-of-centre stores, which explains why the capacity in the town centres do not add up to the District totals.
- 12.74 We advise that all the forecast capacity should be directed to town centres in the first instance, in accordance with the sequential approach set out in PPS6. Therefore the Norwich, South Norfolk and Broadland district centres may well be able to support more floorspace than forecast in the table above. By using the capacity projections at the geographical level it would also be justifiable to support new floorspace in smaller local centres. This is discussed further in the strategy at Section 13.

Summary

- 12.75 In this section, we have set out the key assumptions and data sets used to reach the baseline turnover and performance analysis of existing convenience and comparison retail floorspace.
- 12.76 We estimate that total available convenience goods expenditure within the survey area will grow by 12% between 2006 and 2016, and by 19% between 2006 and 2021. In comparison, available spend on non-food retailing is forecast to increase by a substantial 45% up to 2016, and by 80% up to 2021.

- 12.77 The Norwich Urban Area Area comprises the vast majority of the floorspace and comparison goods turnover identified across the study area. The survey results indicate that the area retains 49.3% of all comparison goods spending available within the survey area. As would be expected given the scale and quality of their retail floorspace, neither South Norfolk nor Broadland rural areas have a strong market share across the survey area.
- 12.78 In terms of convenience goods it is apparent that stores in the Norwich Urban Area, on average, are over-trading and stores in South Norfolk and Broadland rural areas are broadly under-trading. When the geographical areas are broken down to the specific centre and stores it is apparent that the city centre is trading well, slightly above company averages. The majority of this turnover (68%) is from the edge of centre stores of Morrison's Riverside and Sainsbury's Brazen Gate.
- 12.79 Anglia Square is identified as trading poorly, which is to be expected given the relative lack of a key food anchor here. South Norfolk's town centre convenience provision is generally trading well, as is the out-of-centre provision. With the exception of Old Catton, which is under-trading, Broadland centres are also trading well.
- 12.80 In terms of comparison goods our capacity projections estimate that across the three areas there is capacity for additional 14,125 sqm net of comparison goods floorspace by 2011, rising to 43,352 sqm net by 2016. The majority of the residual spend and floorspace capacity is located in the Norwich Urban Area.
- 12.81 Our assessment indicates that, in strictly quantitative terms, there is some capacity for additional convenience floorspace across the Norwich Urban Area in the next five years. However, in quantitative terms, there is no forecast capacity in South Norfolk and Broadland rural areas over the next 10 to 15 years.
- 12.82 We have also provided a breakdown of retail capacity for the main study centres. However, we advise each local planning authority that the capacity identified for specific centres does not necessarily mean that the identified floorspace should be met within that centre. A more appropriately located site in a nearby centre may encourage, for example, more sustainable travel patterns. Also while the centre forecasts highlight the 'general' location where need should be met, qualitative factors are also important in considering the most appropriate location of new floorspace.