EXECUTIVE SUMMARY

The Retail and Town Centres Study was commissioned by the three authorities that make up the Norwich Sub-region (Broadland, Norwich City and South Norfolk Councils) together with Norfolk County Council. It was prepared by GVA Grimley and it provides a robust evidence base for the Core Strategy being prepared for the same sub-region and deals with the role of the city centre as a major regional centre, as well as the roles of the smaller market towns and district centres in the area.

The study takes full account of the potential increases in population arising from the growth proposed in the emerging Regional Spatial Strategy for the East of England. It also takes into account the projected increase in household expenditure on different types of goods, changing forms of retail and leisure provision and the impact of any increases in trade draw from competing centres. Health checks were undertaken on each of the centres included (except for three in South Norfolk which were covered by a recent assessment carried out for the District Council). The study presents a baseline for future monitoring of changes in the health of the centres.

Chapter 2 provides a summary of national and regional policy. This demonstrates that development and investment should be directed first to existing town centres, in order to enhance their vitality and viability. Norwich City Centre is identified by regional policies as a major regional centre and the role of Norwich as a retail, cultural, leisure and education centre is promoted. The important role of smaller market towns and village centres is also recognised.

The relevant Local Plans are reviewed in Chapter 3 and found to support the approach of PPS6. All the plans recognise that development should be consistent with the scale, size and function of the centre concerned.

Chapter 4 identifies key retail trends nationally and considers how they may apply to the area in future. Continued growth in expenditure can be expected, albeit the study uses conservative forecasts to allow for cyclical variations over time. Internet shopping is also growing rapidly and is allowed for in projections of future expenditure. The trend by which larger stores (especially foodstores) evolve into multi-department stores is recognised as a potential threat to some smaller centres/ shops, where larger out-of-town stores become the destination for all shopping trips. Where smaller centres have been unable to diversify their offer, they have often suffered from this trend.

Similar trends are also evolving in the commercial leisure industry. Government policy has encouraged mixed-use retail and leisure developments to town centre or edge-of-centre locations and this has proved to be a real growth area in regenerating town centres.

Chapter 5 sets the prospects for Norwich's retail position in the context of competing centres. The city centre has a strong regional role and a relatively strong and attractive retail offer. Also the main competing centres are at some distance.

Norwich's position means that it is unlikely to lose significant retail expenditure to other centres over the forthcoming period, even though other centres such as Ipswich, Cambridge, Bury St Edmunds and Kings Lynn are improving their retail offer.

The study recommends that Norwich needs to maintain its competitive position by continued investment in the retail centre, including the historic environment and tourist attraction of the centre and its specialist retail sectors.

Chapter 6 provides a qualitative assessment of the City Centre, based on surveys undertaken in early 2007. As a major regional centre it has a wide range of shopping attractions as well as leisure and service facilities. It has an attractive environment and a unique identity and character, which all form part of its attraction to shoppers. Its comparison shopping offer is exceptionally good, whilst the main convenience stores are located on the periphery of the centre and provide a limited floorspace compared with centres of its size.

Norwich also has a good range of bars, restaurants, café sand night clubs located throughout the centre. This is further reinforced by Riverside, although the survey suggests that this functions primarily as a car-based destination and there are limited numbers of linked trips to the rest of the city centre.

Anglia Square Large District Centres is assessed in Chapter 7. It is shown to be partly a specialist secondary retail area to the city centre , but also in need of investment and refurbishment. This centre has excellent accessibility and is designated for significant redevelopment in the Local Plan. This is supported by the Study's recommendations, which also suggest that a strong new anchor foodstore would provide a key attractor to help regenerate the centre.

Other district centres in the urban area are assessed in Chapter 8 (in both Norwich and Broadland). These centres vary considerably in size and variety of shopping. There is also a proposed new centre at Hall Road in Norwich.

Of the existing district centres most provide vital and viable retail services, with few vacant shops in most of them. The anchor foodstores vary in size, but each centre provides for such purchases mainly on a top-up basis. The largest are stores at Thorpe (Dussindale) and Eaton (Waitrose).

Some district centres would benefit from provision of financial services such as banks – e.g. Distillery Square, Drayton Road and the Larkman. Other centres could be improved by provision such as community centres, health centres, libraries and job centres.

The maintenance of short-term parking opportunities is vital to each of these district centres and this aspect could be improved at Plumstead Road, the Larkman and Drayton Road. Also pedestrian crossings provide an important link to residential areas – especially at Aylsham Road and Drayton Road where foodstores are separated from other parts of the centre by a road. Several of the district centres would benefit from improvements to the public realm.

The market towns in the rural areas area assessed in Chapters 9 and 10. in Broadland the centres of Acle, Aylsham and Reepham were assessed. They provide essential local convenience shops and Aylsham has a wider range of provision than the others, with a new foodstore being planned on an edge-of-centre site. It is essential that these centres maintain and enhance their retail offer to meet the day-to-day needs of local residents as well as serving a wider tourist and visitor market.

In South Norfolk Diss, Wymondham and Harleston are all attractive well maintained town centres, while on a larger scale than their Broadland equivalents. Diss is the largest market town centre with good food provision. However, the study suggests its offer could be improved with more non-food shopping and opportunities for restaurants and bars. Wymondham, on the other hand has an under-provision of food shops, largely because the main Waitrose store is outside the centre. The surveys undertaken show that it is important as a centre for banks and local services, which should be maintained. Harleston has a Budgens foodstore within the centre and has a range of other independent retailers, but could support a wider range of non-food provision in order to support its position in the South Norfolk hierarchy of centres.

Chapter 11 deals with the commercial leisure aspects of town centres. The Sub-Region has a good provision of such leisure facilities – cinemas, bingo, ten-pin bowling, bars, restaurants and health and fitness clubs. Much of the provision is concentrated in Norwich city centre. Neither Broadland or South Norfolk have significant commercial leisure facilities.

For cinema screens, Norwich has considerably more – at 26 – than would be expected by the area’s population. This means that there is no quantifiable need for new cinemas up to the year 2016.

In the telephone survey, respondents tended to identify an under-provision of swimming pools and other private leisure facilities in the area ‘within a reasonable distance’ of their home. Whilst there is adequate provision in the centre, there may be opportunities for innovative leisure development to build on the existing offer.

In terms of restaurants, bars and clubs, Norwich has a very strong draw across the whole area, both in the daytime and the evening. The larger market towns of Diss, Aylsham, Wymondham and Harleston also have a good market share of trips for such purposes. The study suggests that a broad level of provision amounting to a minimum 15% of town centre floorspace comprises cafes restaurants and bars and this proportion is a good guide to future needs for provision within new development schemes.

Overall the study proposes that leisure growth in the study area could amount to some 23% by 2016 and that this should be located primarily where it will assist in maintaining the vitality ad viability of city and town centres.

The retail capacity of the study area is assessed in Chapter 12, using projections of population, household expenditure and the future efficiency of existing retail floorspace.

Total available convenience goods expenditure is projected to grow by 12% over the period to 2016 and by 19% to 2021. In comparison available non-food retail expenditure is projected to increase by 45% to 2016 and by 80% by 2021.

In terms of convenience goods it is apparent that stores in the Norwich urban area, on average, are over-trading (measured against national averages for specific stores), whereas rural stores tend to be under-trading. City centre stores in particular are trading well – principally Morrisons at Riverside and Sainsbury’s at Brazen Gate. Anglia Square is identified as trading poorly, but its main food store closed in 2004. With the exception of Old Catton, which is under-trading, the Broadland centres are generally trading well.

A forecast is made for capacity in each sector and for comparison goods this amounts to an additional 14,125 sq.m. (net) floorspace by 2011 and 43,352 sq.m. (net) by 2016 (the recently completed Chapelfield Mall included a total of nearly 30,000 sq.m. net floorspace). For convenience goods floorspace there is some additional capacity across the area, but no forecast capacity for new stores in Broadland or South Norfolk over the period of the study.

The Key Findings and Recommendations are summarised in Chapter 13. The following points are additional to those identified above

- The stronger and more attractive town centres have good accessibility and will continue to remain vital and viable centres over the longer term;
- The evolution of larger out-of-town foodstores into quasi variety or department stores could present a threat to smaller less viable centres;
- Norwich City Centre is achieving a significant market share across the whole sub-region and it needs investment to maintain its position. This may have a significant influence on the role and function of other smaller centres in the area;
- Norwich is unlikely to lose significant market share from its catchment over the period;
- The city centre development and investment needs to protect its historic environment and tourism offer, as these contribute to its unique identity and character;

- Investment in the centre can assist in improving linkages and integration between Chapelfield and the rest of the centre;
- Linkages between Riverside and the rest of the shopping centre should also be strengthened;
- Steps should be taken to improve and publicise the safety, security and policing of the city centre in the evenings;
- Anglia Square represents the most suitable, viable and available sequential opportunity to meet the identified need for new convenience floorspace in the city centre.
- Three potential opportunity sites in the city centre have been identified that would assist in meeting the need for new comparison goods floorspace and also integrate recent developments more fully into the retail centre – at Westlegate, St Stephens Street and Ber Street/ Rouen Road. Subject to further appraisal of these sites, and a joined-up approach to their development, they would clearly go some way to meeting the identified scale of need.
- The market towns of Diss, Harleston, Aylsham and Wymondham also need to maintain their roles and development can support opportunities to maintain and diversify their range of retail and service uses. The key to their success will be to identify a complementary offer that can draw people from their area, while not competing directly with the higher regional centre of Norwich.
- The existing retail warehouse parks in the Norwich area meet the need for this kind of floorspace and the study does not suggest there is need for any additional out-of-centre retailing.
- The areas of residential growth to be identified in the Core Strategy could provide significant support to strengthening and extending the existing shopping and town centre offer of some of these smaller towns. Sites would need to be identified and brought forward – preferably in or close to the town centres – in time to serve the new developments;
- For major new residential development, where not served by existing centres, a range of additional shops, services and activities would need to be promoted to serve the development. This should preferably take the form of a district centre development with a foodstore as an anchor and including sufficient leisure and ancillary activities to make it attractive for a range of trips.
- The input assumptions and trends should be continuously monitored and tested as and when new projections are published.