Executive Summary

- DTZ were jointly commissioned by Great Yarmouth Borough Council and Waveney District Council in order to provide a retail and leisure study in line with Central Government guidance. It will inform and support the preparation of their respective evolving Local Development Frameworks (LDFs) and with the assessment of retail and leisure proposals.
- By way of background information the study area covers Great Yarmouth Borough and Waveney District (**Figure 1**), which is home to c.210,000 people. The study area is geographically situated at the eastern most point of the British Isles. For centuries the area has been dominated by maritime and military industries, which had a significant impact on its social, economic and political life. The area is known for its poor accessibility and overall communications, which contributes to its relative isolation.

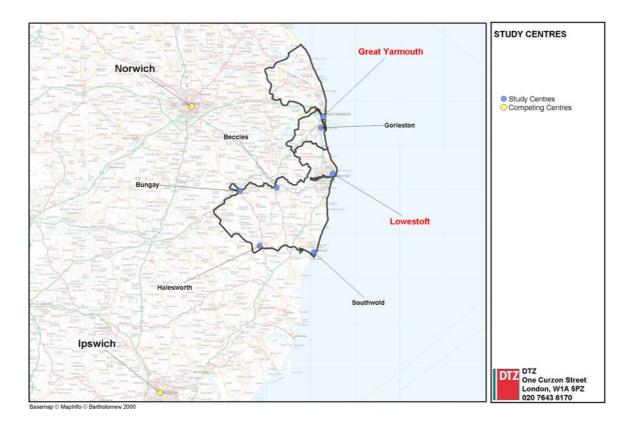


Figure 1: Study Centres

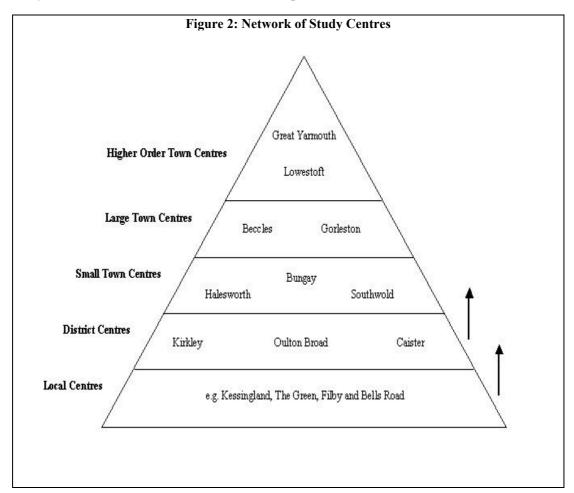
Today, the settlements have somewhat diversified from this image and play host to an expanding number of visitors. Within the study area, Great Yarmouth and Lowestoft are the main centres for retail and leisure activity within their respective administrative areas and their attractiveness needs to be enhanced to ensure their long-term vitality and viability. It is no secret that Great Yarmouth and Lowestoft need to encourage development to increase their performance and to achieve sustainable economic growth.

Hierarchy of Centres

When considering retailing in the Great Yarmouth Borough and Waveney District it is important to bear in mind the shopping offer of other destinations in the region. By

understanding the context of retailing beyond the study area, a fuller understanding of the realistic scope for managing change can be gained. In this way, the study centres' retail performance and prospects cannot be divorced from those of competing centres, both higher up and lower down the shopping hierarchy. A significant improvement to one centre holds the threat of drawing trade from others.

- The settlements of **Norwich** (regional centre) and **Ipswich** (sub-regional centre) are the dominant retailing centres in the sub-region with their greater range of comparison goods stores, which include department stores, variety stores, key fashion retailers and an extensive range of national multiple retailers. Subsequently, the centres dominate extensive catchment areas and, while predominantly rural in nature, they encompass a variety of surrounding towns and villages in their hinterland.
- The retail and leisure attractiveness of both centres has a significant influence on the centres contained within the study area. Furthermore, it is likely that the investment and expansion of their provision will continue to increase in the foreseeable future, (e.g. the new Chapelfield Shopping Centre in Norwich city centre) and this will inevitably have implications for the study centres. In short, if other centres in the study area's hinterland improve their offer, so must the study centres, especially Great Yarmouth and Lowestoft, if they are to retain and/or enhance their current position.



Great Yarmouth and Lowestoft (higher town order centres in the hierarchy – see Figure 2) offer a range of convenience and comparison goods shopping, as well as service facilities normally associated with centres of this size and influence. At this level in the retail hierarchy, a selection of quality national multiple retailers are present, but there is no

significant department store representation (i.e. John Lewis, Selfridges, House of Fraser, Debenhams). These centres collectively address district needs and requirements.

- Moving down the shopping hierarchy are the towns of **Beccles** and **Gorleston** wherein the comparison shopping and service facilities serve principally local needs. Compared to the above hierarchical tier, national multiple retailer representation is limited. In terms of convenience shopping, the provision in each of the centres is dominated by a large foodstore. Subsequently, the catchment areas for main food and top-up food shopping serve a wide catchment area, extending beyond the town boundaries.
- Dower down the shopping hierarchy are the smaller market towns of **Bungay**, **Halesworth** and **Southwold**, wherein the shopping function; together with community activities (i.e. community centres, libraries, health services and other public amenities) serve local needs only. Although, there is definitely an increased emphasis on convenience shops and services, the majority of their food and non-food expenditure is leaked to higher order centres in the hierarchy, but this is to be expected. Their current performance and future prospects increasingly relies upon the independent retail sector.
- There is, however, a lower level still in the shopping hierarchy that embraces small **district** and **local centres**. These centres, positioned in predominantly residential surroundings, generally contain only a parade of small shops, normally anchored by convenience stores and containing ancillary services (such as banks and post offices), serving a walk-in catchment population. They are entirely reliant on local expenditure or passing trade (i.e. proximity to a busy road). In these centres, especially local centres, national multiple representation is negligible.
- At the various levels in the shopping hierarchy, each centre has a different role and function, performance level and potential prospects. The established hierarchy does not prevent the smaller centres from continuing to be viable. Their current role is to provide for the day-to-day needs of the local population and, moreover, a range of shopping for less mobile shoppers.

Great Yarmouth

- Great Yarmouth town centre functions as a retail, commercial, cultural, educational and leisure destination. The retail provision is dispersed across a wide area, but the focus of commercial activity in the centre, especially comparison goods retailing, continues to be centred on the pedestrianised Market Place/King Street, which has a north-south axis, and Market Gates Shopping Centre, which runs perpendicular to the central spine. All other shopping areas within the centre can, in our opinion, be deemed secondary.
- It is our view that Great Yarmouth has a relatively healthy centre. It has two department stores and the full complement of variety stores (Marks & Spencer, Bhs and Woolworths). It also has one of the 'big four' foodstore operators namely Sainsburys in its centre, albeit edge-of-centre. At this level in the shopping hierarchy all these retailers serve an important anchor function to the centre because they continue to bring shoppers into the centre frequently and regularly. The centre also benefits from a diverse range of other uses, as well as a popular sandy beach, that all encourage visitors into the centre.
- However, we are concerned about the high level of vacancy in the centre, both in terms of outlets and floorspace, as well as the recent decline in the centre's yield. There has also been a limited scale of new development in the centre in recent years, which leads us to the view that whilst the centre maybe vital, it is not particularly viable in terms of attracting new development and investment. All these factors do not point to a vibrant and robust centre. Moreover, given the proximity of Great Yarmouth to the regional centre of

Norwich, it is likely that Great Yarmouth will continue to lose some trade to this dominant centre in its hinterland, especially in terms of expenditure in fashion goods.

On a more positive note, at the time of writing the new owners of Market Gates Shopping Centre had recently submitted an application for planning permission to increase the gross floorspace of the shopping centre by 9,354 sq.m. In our view, the potential investment to be pumped into the tired scheme, together with the reconfiguration of some small units to suit modern retailer requirements, will be a welcome boost and could act as a springboard for enticing new retailers to occupy the voids that currently exist in the centre. Moreover, it will help Great Yarmouth town centre to maintain and enhance its overall vitality and viability.

Lowestoft

- Lowestoft town centre is the principal shopping and commercial centre within Waveney District. It performs a strong role as a functional town centre catering for the convenience, comparison and service needs of the district's population. The centre is segmented into two halves by virtue of the busy Artillery Way, which acts as a physical barrier. From the retail perspective, the threat remains that the shopping centre is in danger of breaking into two. On the one hand, the retailing to the south focuses on the prime pitches of London Road North and The Britten Shopping Centre. On the other hand, to the north of Artillery Way is the secondary pitch of the High Street. However, between the two divided retailing areas there does not appear to be a particularly strong link.
- An important anchor function to the town centre as a whole is served by the department stores, the three variety stores and the two principal foodstores, which perform main trip and top-up food shopping roles. However, there has been no substantive new development in the centre over the past decade or so. In this way, it will never compete directly with the higher order centres in the East of England, which continue to improve their retail offer.
- At this level in the shopping hierarchy we consider that Lowestoft is generally performing well at the moment. There are a limited number of vacant properties, rental levels and yields are both improving, the centre is predominantly pedestrianised which allows shoppers to peruse the shops in a pleasant and safe environment.

Beccles

- The rural settlement of Beccles is the largest of the four market towns in Waveney District. It serves the shopping and service needs of the town's population and neighbouring villages. Given that the centre does not have a wide range of national multiple retailers and the representation of variety stores is restricted to Woolworths, it is our view that the important anchor function to the centre as a whole is served by the Co-op Westgate department store and the new edge-of-centre Tesco supermarket, which performs main trip and top-up food shopping roles. With regard to the latter, if the resident population undertake food shopping locally, they may be inclined to resist other shopping destinations for non-food visits and other shops in the centre are therefore supported. In this way, this type and size of supermarket in this location are in many respects ideal in this size of centre. Now that Beccles shopping function is better anchored, its overall prospects for the future are enhanced.
- Despite the centre's current relative health, we are concerned that the limited amount of investment in traffic management in the centre will result in the town slightly losing its competitive edge and attractiveness. Subsequently, it does need a further injection of investment in this area in order to remain robust and competitive. Overall, there is no room for complacency.

Gorleston

- Gorleston does not boast the historic streetscape and charm of the majority of the study centres. Instead, it contains a purpose-built, functional and well-managed retailing centre. It trades in the shadow of Great Yarmouth and this is likely to be the case for the foreseeable future. There is a real lack of "quality" retailers in the centre and this is reflective of the fact that the centre does not attract a large number of shoppers from a wide catchment. This point is reinforced by the dominance of fashion retailers at the lower end of the market, which occupy units in the primary shopping pitch.
- Whilst there is no specific evidence to point to a picture of fragility or decline in Gorleston town centre (i.e. the low level of vacancy), the very limited list of national multiple retailers seeking representation and the centre's decline in the national rankings does not point to a vibrant and robust centre. We believe that Gorleston's future performance and prospects will depend upon its ability to meet local residents and tourists needs effectively. In this way, every opportunity should be taken to sustain or enhance the important food shopping function and to continually seek to improve its existing environment and townscape quality.

Bungay

Bungay is an old market town rich in history, which is slightly larger than Halesworth and Southwold in terms of retail floorspace. At this level in the hierarchy, the town centre provides important shopping and service facilities. These serve their role well with catering for the basic shopping and service needs of the town's inhabitants and its rural hinterland. Moreover, the specialist-shopping element (i.e. antique shops) encourages the occasional visitor into the centre, which is important to the centre's overall well-being. We are, however, concerned about the high level of vacancy in the centre.

Halesworth

Halesworth has an attractive and vibrant town centre, which accommodates a high proportion of convenience shops and services catering for the local population's needs. In our view, it is this level of basic shopping facilities that underpins the centre's relative vitality and viability, which serves local residents and those in the south of the district.

Southwold

- The heritage seaside resort of Southwold has an alternative shopping role to that of the other landlocked market towns. The centre is anchored, collectively, by the specialist retailer trade. In this regard, its reputation is far reaching and visitors will travel a considerable distance to enjoy the specialist trading opportunities. The small and historic shop units positively lend themselves to this type of trade.
- Southwold has a dual shopping role, serving local residents and tourists alike. With this in mind, it is important that the town's range of shops and services, which rely heavily on visitor expenditure, do not become too influenced by the tourist market, and continue to cater for the local population. This has important implications for sustainability and the less-mobile local residents. Encouragingly, the vacancy level is extremely low.

District and Local Centres

In general terms, the district and local centres within the study area appear to be healthy and are serving their roles by catering for the needs of their local catchments. However, there is scope in some centres to consolidate the centres and allow the focus of retail and service uses to be focused in a single, tighter area. For example, there is potential in Bells Road to convert existing vacancies in peripheral areas to residential use. Similarly in Kirkley, which

also has a large number of vacant units, and lacks basic service provision (such as banks and a post office), would benefit from further convenience and service representation to help strengthen the role of the centre.

Overall, we recommend that the district and local centres' important role and status in the study area should be strengthened, particularly where new population growth is forecast.

Retail Capacity Findings

- Our study has focused on the next fifteen years to identify how changes in population, personal spending levels and future retail business requirements will affect the capacity for new development in the retail and leisure sectors. Our findings suggest an increase in spend especially for the non-food comparison goods sector, as well as for convenience retailing. Our key findings are as follows:
 - population across the Great Yarmouth Borough zone is set to increase by 10.9% increase (from 92,203 in 2006 to 102,221 in 2021) and by 12.5% across the Waveney District zone (from 117,483 in 2006 to 132,202 in 2021).
 - the total available comparison goods spend in the defined study area is set to almost double from total potential available spend on comparison goods. It will increase by +96% between 2006 and 2021. In contrast, spend on convenience goods is forecast to increase by only +12% over the same period under the baseline scenario.
 - by 2021, this translates to a median level available residual spend of £250m in Great Yarmouth Borough seeking new comparison goods floorspace after accounting for committed floorspace in the development pipeline. In Waveney District this translates to a median level residual spend of £158m.
 - depending on the intensity of trading in retail businesses, for Great Yarmouth Borough this could lead to the requirement for between 29,000 sq.m net and 43,000 sq.m net additional comparison goods sales space by 2021. In comparison, for Waveney District this could lead to the requirement for between 18,000 sq.m net and 27,000 sq.m net additional comparison goods sales space.
 - there is limited capacity for convenience goods retailing in the short (2011) to medium (2016) term across both authorities. By 2021, the median range comparison goods projection for Great Yarmouth Borough is between 3,100 sq.m net and 6,300 sq.m net. The equivalent figures for Waveney District are in the range of 2,300 and 4,700 sq.m net
 - in summary, our capacity projections indicate:
 - that there is a **limited capacity for new convenience goods** retailing up to 2011. This is due to the minimal forecast growth in average spend levels and in the case of Waveney District this is compounded by the large quantum of new foodstore and convenience goods space with planning permission (c.3,300 sq.m net).
 - more **substantial capacity for new comparison goods** retailing up to 2011 with increasing capacity to 2021. We recommend that major new floorspace capacity is concentrated in the higher order town centres in the hierarchy. These centres have the critical mass of retailing and catchments to sustain significant new additions to their retail stock, which will help to reinforce their relative status as the principal shopping locations.

- although there is potential capacity for new non-town centre comparison goods space, we recommend that this should be accommodated in town centre locations. It is also important to emphasise that government planning policy guidance stresses that existing centres should be the first choice for all new retail and leisure development. Only if there are no available, suitable and viable sequential sites to accommodate this type of retailing should consideration be given to edge-of-centre, and then out-of-centre locations. Any proposals in out-of-centre locations will also need to be subject to the usual tests, as set out in PPS6 (para. 3.4), and applicants will need to demonstrate:
 - the need for development (PPS6: paras. 3.8 3.11)
 - that the development is of an appropriate scale (para. 3.12)
 - that there are no more central sites for the development (paras. 3.13 3.19)
 - that there are no unacceptable impact on existing centres (paras. 3.20-3.23)
 - that locations are accessible (paras. 3.24 3.27).

Leisure Capacity

- Within the context of a general increase in leisure expenditure, there is currently a reasonable level of interest from A3/A4/A5 operators. Our analysis shows that by 2016, the potential capacity for this floorspace is between 3,520 sq.m to 7,890 sq.m net in Great Yarmouth Borough, and between 2,100 sq.m to 4,740 sq.m net in Waveney District.
- There is a strong independent provision in terms of health and fitness activities within the study area. There is low market demand in terms of commercial leisure requirements, however this is matched by a lower than average take up of these facilities by the resident population. Existing facilities should be maintained and protected by promoting investment in facilities that would encourage an increase in participation by the local population.
- There should be a capitalisation upon the outdoor pursuits afforded by Great Yarmouth and Waveney's rural setting; in particular, promotion of activities such as cycling, fishing, shooting and bird watching which are already well-represented.
- Cinema provision within the study area can be considered adequate. Operators should be encouraged to maintain investment in facilities to encourage more use by the local population. The capacity for additional screens is limited.
- There is a higher than average propensity towards gambling within the study area. The dog track and racecourse should be maintained and protected to ensure this interest is consolidated as it is a major draw for the resident population. There is also strong market evidence for demand of casino facilities and a further scoping study is recommended to gauge the viability of the potential for a regional/sub-regional casino within the study area.
- There is strong independent representation within the hotel market. In the future it is likely that budget chain operators will likely seek increased representation. The benefit will be increased competition with independent operators to ensure that the highest standard of hotel provision is maintained.
- Cultural activities provide a crucial link between the hotel trade and tourism within Great Yarmouth and Waveney; current cultural activities should therefore be maintained and protected to ensure that their offer remains attractive.

Strategy for the Study Area

- It is widely anticipated within the study area that Great Yarmouth will improve its role and attraction as a dominant centre if the proposed phased 'Market Gates' redevelopment and expansion proceeds as planned. Furthermore, if (and when) the other potential development and investment opportunities in the centre come to fruition (such as the URC masterplanning exercise and the sites analysed as part of this study The Conge, Stonecutters Way/Howard Street South area) they will also help to strengthen the town centre's position considerably, leading to an increase in its overall attraction, catchment area and market share over time.
- With the above in mind, and as previously stated, we are somewhat concerned with the lack of private sector investment in Lowestoft town centre in the recent past and in the development pipeline. As a result there is a need for Lowestoft to raise its status, using marketing and promotion initiatives. Standing still is akin to decline. Great Yarmouth at present has the benefit of investor interest in its centre. The implication for Lowestoft is to address this imbalance by encouraging market interest, say, by way of the URC initiative, but overall there is a further need to engage with, and attract, private sector investment in the retail and leisure stock within the centre. This needs to be through a process of dialogue that promotes the centre, but also places it on the radar of investors and retailers. The key aim of this process is to yield opportunities for redevelopment and reconfiguration within the centre that will create units suited to modern retailer requirements.
- In our opinion, neither Great Yarmouth nor Lowestoft has a strong (quality) restaurant or evening offer. There would, therefore, appear to be potential to strengthen the eating and drinking offer in both centres as part of the URC regeneration initiative, which would also cater for any potential increase in tourists and visitors to the area.
- Gorleston and Beccles perform and trade in the shadow of Great Yarmouth and Lowestoft respectively, especially in terms of comparison goods retailing. However, in terms of convenience retailing the foodstores play an important role in retaining expenditure from their respective catchments. This, to a certain extent, assists with the creating spin-off trade from which other retailers can benefit in each centre. In our opinion, Gorleston and Beccles perform an important role in the network of centres and should not be ignored as higher order centres move forward. In the medium to long-term, we recommend that a robust vision and strategy be developed for the centres to meet the challenge of new development and investment elsewhere in the sub-region.
- We have acknowledged that, to varying degrees, the three lower order centres of Bungay, Halesworth and Southwold could have physical and planning constraints to their future development and growth. These attractive visitor centres need to maintain and enhance their important convenience offer, as well as advance their profile as part of a comprehensive spatial strategy on tourism as set out in government guidance.
- In relation to the district and local centres, the majority of which are currently healthy, we recommend that a robust vision and strategy be developed, in the medium to long term, in line with their status. The aim should be to meet the challenge of new development and investment elsewhere in the study area. It is acknowledged, their growth will be more 'organic' than the higher order centres. For example, this could involve redefining their role so that it complements rather than competes with the main town centre offer and builds on tourist and visitor attractions where necessary.
- We strongly recommend that all the centres' overall vitality and viability be maintained and enhanced in accordance with PPS6. We consider that their growth needs to be in keeping with the relative status, character and catchments. In some cases the potential exists to build on waterfront locations and attractions, to create more vital and viable tourist and

visitor destinations. In most cases, the medium to lower order centres are anchored by a foodstore, and supported by a range of other convenience and service businesses, as well as community facilities. It is our view that these smaller centres will only continue to flourish in the future if the scale and quality of their food offer and other facilities are maintained and enhanced.