

North Norfolk Retail and Main Town Centres Uses Study Final Report

North Norfolk District Council

22 March 2017

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Glossary

Benchmark Turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services

Non-retail uses classed as A1 in the UCO, such as hairdressers, travel agents and dry cleaners.

Class A2

Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3

Commercial units classed as restaurants and café food outlets within the Use Classes Order.

Class A4

Commercial units classed as public houses or bars within the Use Classes Order.

Class A5

Commercial units classed as fast food or takeaway food outlets selling cooked hot food.

Convenience Goods

Consumer goods purchased on a regular basis such as food/groceries and cleaning materials.

Comparison Goods

Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian

A data consultancy widely used for retail planning information.

Food and Beverage

Class A3, A4 and A5 food and drink outlets, but not food and grocery items including in convenience goods.

Class A4

Commercial units classed as public houses or bars within the Use Classes Order.

Class A5

Commercial units classed as fast food or takeaway food outlets selling cooked hot food.

Goald Plans

Town centre plans prepared by Experian, which a based on occupier surveys of over 1,250 town centres across the country.

Gross floorspace

Total external floorspace including exterior walls.

Higher order comparison

Durable goods which tend to be high value, bought comparison goods on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.

Javelin Venuescore

A database of retail locations that enables the user to rank and sort the UK's shopping venues against a range of different criteria incl. market size. location type, market position and sector.

Lower order comparison goods

Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.

Multiple traders/outlets

National or regional 'chain store' retailers.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other area not accessible to customers.

The Requirements List

A published source of information providing known retail and leisure operators' space requirements in towns across the country.

Zone A Rent

The annual rental charge per square foot for the first 20 foot depth of a shop unit, which is the most suitable measure for standardising and comparing rental levels.

1.0 Introduction

Background

- 1.1 Lichfields has been commissioned by North Norfolk District Council to prepare a Retail and Main Town Centre Uses Study. The study covers the entire District of North Norfolk, including parts of the Broads located within the local authority boundary.
- 1.2 The study has been prepared in line with the National Planning Policy Framework (NPPF) relating to the need to ensure the vitality of town centres (paragraph 23), strategic priorities for retail, leisure and commercial development (paragraph 156) and the evidence to assess the need economic development (paragraph 161). The study is also in accordance with the Planning Practice Guidance (PPG).
- 1.3 The study will inform the preparation of the new North Norfolk Local Plan and the Broads Local Plan, which will provide the planning policy context for development across the whole of North Norfolk from 2016 to 2036. Any evidence base study carried out at the current time needs to be cognisant of some significant recent changes:
- 1 Changes in policy - the NPPF heralded the biggest single change in national planning policy in a generation, and it raises the bar for local authorities in terms of the positive approach and a greater emphasis on the deliverability of plans.
 - 2 Changes in economy - there is significant uncertainty relating to town centres and the retail sector, particularly following the EU Referendum vote. The study must adopt up-to-date and authoritative economic forecasts.
 - 3 Changes in market - the above issues have had an impact on the commercial property market dynamics, both in terms of local demand and on the overall ability of developers and firms to access finance.
- 1.4 All of these factors mean that previous evidence based work¹ will have changed. The key objective of the North Norfolk Retail and Main Town Centre Uses Study is to provide a robust and credible evidence base to inform the Council's work on emerging Local Plan 2036, based on changes since the previous retail study was prepared in May 2005.
- 1.5 The Retail and Main Town Centre Uses Study is based on up to date and sound research. The study establishes existing shopping patterns, based on sound empirical evidence and comprehensive customer survey research, including both customers who use facilities in the District and those who shop elsewhere.
- 1.6 This report provides a quantitative and qualitative assessment of the need for new retail and main town centre uses within North Norfolk District. It provides a description of existing retail facilities within the District, and it identifies the role the main town and district centres play in meeting the needs of customers. The assessment of need includes both food and non-food retailing and eating/drinking away from the home.
- 1.7 The key objective of the study is to provide a robust and credible evidence base to inform the Council's work on emerging policy documents. The study includes an assessment of:
- 1 changes in circumstances and shopping patterns since the previous studies were undertaken, not least the effects of the recession, the availability of 2011 Census data, the requirements of the NPPF and the recent changes to permitted development rights;

¹ Retail and Commercial and Leisure Study, prepared by DTZ Pieda Consulting (May 2005)

- 2 the future need and (residual) capacity for retail, food and beverage and leisure floorspace for the period up to 2036;
- 3 the potential implications of emerging developments both within and outside North Norfolk, in terms of impact on town centres and potential changes to shopping patterns;
- 4 the existing retail hierarchy and network of centres and advises whether any changes are required; and
- 5 development plan policies, allocations and recommendations on how each centre can develop its role.

1.8 The assessment of the need for additional retail, food/beverage and leisure facilities is based on projected population and expenditure growth within the catchment areas of the main retail/leisure destinations within North Norfolk District. A study area has been defined to cover these catchment areas and a household telephone survey has been undertaken in order to quantify existing shopping and leisure patterns. These trading patterns are projected over the plan period in order to quantify the need for new floorspace in the District.

Report Structure

1.9 Section 2 summarises the relevant policy context and Section 3 describes the current provision in North Norfolk and relevant market trends. Sections 4 and 5 provide need assessments for retail and other main town centre uses. Section 6 assesses the main town centre in the District. Section 7 provides a summary and conclusions.

2.0 Policy Context

National Policy

- 2.1 The previous 2005 Retail Study was based on the guidance set out in PPS6: 'Planning for Town Centres' published in March 2005, which was superseded by PPS4 in December 2009. PPS4 was superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4).
- 2.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):
- 1 local planning authorities should positively seek opportunities to meet development needs of their area;
 - 2 local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
 - i any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
 - ii specific policies in this Framework indicate development should be restricted.
- 2.3 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).
- 2.4 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:
- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
 - take account of the different roles and character of different areas, promoting the vitality of main urban areas;
 - encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.
- 2.5 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20). In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:
- 1 the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
 - 2 the role and function of town centres and the relationship between them, including any trends in the performance of centres.

3 the capacity of existing centres to accommodate new development.

2.6 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- 1 recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- 2 define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- 3 define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- 4 promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- 5 retain and enhance existing markets and, where appropriate, reintroduce or create new ones, ensuring that markets remain attractive and competitive;
- 6 allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- 7 allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- 8 set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- 9 recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and
- 10 where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

2.7 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

2.8 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

2.9 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set

floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

2.10 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

2.11 The National Planning Policy Guidance (NPPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

2.12 The NPPG places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.13 The NPPG also introduces the requirement to consider a range of plausible scenarios, including a 'no development' scenario, which should not assume that all centres are likely to benefit from expenditure growth.

2.14 Recent changes to the General Permitted Development Order (GPDO) may also will also have a short term impact on town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 to A2 use, but only for a temporary period. These measures could change the composition of town centres across the country, in particular the amount of Class A1 space is likely to reduce, but only temporarily.

The North Norfolk Core Strategy

2.15 The existing Core Strategy (incorporating Development Control Policies) was adopted in September 2008. The Core Strategy sets out policies relating to retail and leisure development and the vision for each town centre.

2.16 Policy SS 5 identifies the retail hierarchy with Cromer, Fakenham and North Walsham identified as Large town centres, and Holt, Hoveton, Sheringham, Stalham and Wells-next-the-Sea identified as Small town centres. Policy SS 5 indicates retail development will be concentrated within the Primary Shopping Areas and Primary Retail Frontages, with between 13,300 to 19,900 sq.m of additional retail and leisure floorspace expected to be provided over the plan period.

2.17 Policy EC 5 indicates new retail and commercial leisure proposals in Principal and Secondary Settlements will be permitted, provided that their location and size complies with specified floorspace thresholds, or where the size of the proposal addresses a specific quantitative or qualitative need within the catchment area served by the town. This policy also sets out criteria relating to the need for development, impact and sequential tests. Class A1 retail uses are also protected within Primary Retail Frontages with a 30% limit on non-A1 uses in each primary frontage. Policy EC 6 protects designated car parks.

- 2.18 Policies SS 7 to SS 14 set out the strategy for the eight Principal and Secondary settlements. The policies contain guidance relating to the Large and Small town centres and retail/leisure development within these settlements, summarised as follows.
- 2.19 **Policy SS 7 – Cromer:** suitable sites for the development of new retail floor-space allocated in the Site Specific Proposals Development Plan Document (SSDPD) in locations in, or as close as possible to the town centre, of sufficient size to accommodate approximately 5,000 sq.m of comparison goods floor space. A Public Realm designation defined to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors i.e. town centre, historic cliff top parks and Promenade.
- 2.20 **Policy SS 8 – Fakenham:** a mixed use urban expansion scheme to the north of the town suitable for approximately 800 dwellings. Suitable sites for development of new retail floor-space allocated in the SSPDPD of sufficient size to accommodate up to 6,000 sq.m of comparison goods net sales floor space. These sites will be within, or as close to the town centre as possible. A Public Realm designation defined within the town centre to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors.
- 2.21 **Policy SS 9 – Holt:** opportunities to improve the pedestrian environment of the town centre will be identified in the SSPDPD and the provision of additional car parking, with high quality pedestrian links to the town centre will be sought. A Public Realm designation to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors use.
- 2.22 **Policy SS 10 – North Walsham:** suitable sites for development of new retail floor-space will be allocated in the SSPDPD in locations in, or close to the town centre, of sufficient size to accommodate approximately 4,000sqm of comparison goods floorspace. A Public Realm designation to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors.
- 2.23 **Policy SS 11 – Hoveton:** no retail development identified.
- 2.24 **Policy SS 12 – Sheringham:** between 500-750 sq.m of new comparison goods floor-space will be accommodated, respecting the small-shop nature of the town. Suitable sites for development of new retail floorspace will be allocated in the SSP and a suitable central site for the market will be safeguarded. A Public Realm designation is defined to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors.
- 2.25 **Policy SS 13 – Stalham:** retail, service, community facilities and other appropriate town centre uses, of an appropriate scale only, will be encouraged within the town centre to help revitalise it and strengthen its particular and wider role as a service centre for the Broads and surrounding rural catchment area.
- 2.26 **Policy SS 14 – Wells-next-the-Sea:** a site for a new car park with good access from the main approach roads and to the town centre will be allocated in the Site Specific Proposals document. This allocation should demonstrate no adverse impact on the North Norfolk Coast Special Protection Area. A Public Realm designation is defined to co-ordinate the use of areas where pedestrian access, informal recreation and appearance are crucial to the town's attractiveness to residents and visitors.

North Norfolk Site Allocations Development Plan Document

2.27

The Site Allocations DPD was adopted in February 2011. The DPD allocations a number of sites for retail and mix use development. Relevant sites are reviewed in Section 6 in the analysis of main centres.

3.0 **Current Provision and Trends**

3.1 This section outlines national trends that are likely to influence the need for retail and town centre facilities in North Norfolk District and the prospects for attracting new investment. It also summarises current provision within the District, which provides the baseline for future projections in later sections of this report.

Retail Trends

3.2 The economic downturn had a significant impact on the retail and leisure sectors. A large number of national operators failed (e.g. BHS, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within centres and retail parks. Market conditions are still challenging.

3.3 Many town centre development schemes were delayed and the demand for traditional bulky goods retail warehouse operators has been affected. Even some of the main food store operators have seen a reduction in growth, with discount operators taking market share from the main operators.

3.4 Assessing future expenditure levels within this study needs to take into account the likely speed of the economic recovery, particularly in the short term (2017 to 2021). Careful consideration is needed to establish the appropriate level of expenditure growth to be adopted over the plan period. This study takes a long term view for the plan period recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken. An overview of national trends within the retail sector is set out below.

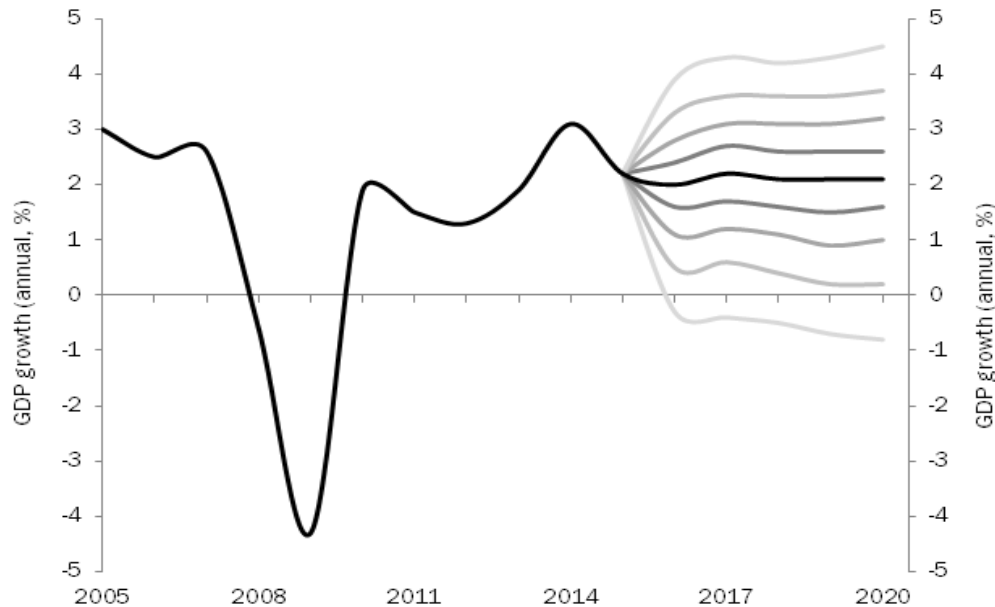
Expenditure Growth

3.5 Historic retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the impact of the EU Referendum is expected to result in slower growth in the short term.

3.6 Figure 3.1 shows the Office for Budget Responsibility's (OBR) forecast for GDP up to 2020. After the recession in 2008, growth rebounded and from 2012 grew to the high of 3% in 2014 and 2% in 2015. The OBR forecasts that growth will be slightly above 2% per year from 2016 onwards. In terms of future growth the black line has a 50% probability of coming to fruition. The grey lines show the probability splay i.e. 60%, 70%, 80% and 90% around the projection line.

3.7 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn has been slow. The high pre-recession growth rates are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping and turnover efficiencies. These national trends are anticipated to be mirrored in North Norfolk District.

Figure 3.1 Forecast GDP Growth to 2020



Source: ONS, OBR

- 3.8 For convenience goods, Experian's forecasts (November 2016) anticipate limited growth (0.1% per annum) from 2024. For comparison goods, higher levels of growth are expected in the future (3% per annum from 2019), still at a lower rate than previous pre-recession trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 3.9 Experian's latest expenditure projections take into account the implications of the EU referendum result, indicating this has created major uncertainties regarding the long term outlook for the UK economy. Experian's baseline forecasts reflect a small downgrade in the UK's long term projections for trade, investment and GDP. However the revisions to the consumer spending forecast are minimal, with long term growth expected to remain around 2.3%, underpinned by rises in population and household incomes. Experian Retail Planner Briefing Note 14 (November 2016) states:
- "The expansion in comparison goods volumes, averaging 3.2% per head to 2035, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual prices significantly, will not be repeated to the same degree.*
- Convenience goods recorded a marginal decline in the decade leading up to the 2008 recession. Volumes were severely hit during the recession and its aftermath..... Our central forecast has a renewed squeeze in convenience goods in the short term, before sales per head growth settles at 0.1% a year from 2019 to 2035."*
- 3.10 Low expenditure growth and deflationary pressures (i.e. price cutting) in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national average shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to about 14% in 2012. Vacancy rates have recovered to 11.8% in 2015.

3.11 There were 46 vacant Class A shop units within the large and small town centres in North Norfolk District (September 2016), an overall vacancy rate of 5.5%, which is much lower than the Goad national average (11.8%). North Walsham town centre has the highest vacancy rate (18.7%), and is the only centre within the District that is above the national average vacancy rate (11.8%).

3.12 These figures suggest centres in the District are performing reasonably well post-recession.

New Forms of Retailing

3.13 New forms of retailing (multi-channel shopping) have continued to grow. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within North Norfolk District, because they will affect the amount of expenditure growth that will be potentially available to support new development and the strength of operator demand for new floorspace.

Special Forms of Trading/Home Shopping

3.14 Recent trends suggest continued strong growth in this sector. Experian's Retail Planner Briefing Note 14 (November 2016) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for close to 15% of total retail sales.

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at 11.7% in mid-2016 against 4.7% in June 2008...

...non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 59.3 million internet users in the UK (representing 91.6% of the population) in November 2015 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2022. Our forecast has the SFT share of total retail sales reaching 18.6% by 2022 rising to 20.4% by the mid-2030s."

3.15 This retail update makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.16 The implications of these trends on the demand for retail space have been carefully considered. Some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.17 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth

projections for retail expenditure, and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

Food Store Operators

- 3.18 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town and local centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express, Sainsbury's Local and Little Waitrose stores has increased significantly during the last decade.
- 3.19 A number of proposed larger food stores have not been implemented across the country. There has been a move away from larger stores to smaller formats.
- 3.20 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. This trend is evident in North Norfolk, with the opening of a Lidl in Cromer in 2013, an Aldi in Fakenham in 2015, the expansion of North Walsham's Lidl in 2014 and the proposed new Aldi in Holt. The discount sector is actively expanding and may look for further opportunities in North Norfolk District in the future.

Comparison Retailers

- 3.21 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes. Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.
- 3.22 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, has been particularly weak during and after the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. The retail warehouse sector is reasonably well represented on retail parks in Cromer and Fakenham in North Norfolk District. The availability of a wide range and choice of retail warehouse operators in Norwich and Great Yarmouth is likely to constrain operator demand in North Norfolk.
- 3.23 Within town centres, many high street multiple comparison retailers have changed their format. For over a decade, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger national, regional and sub-regional centres, e.g. Norfolk. In general operator demand for space has decreased during the recession and, of those national multiples looking for space, many prefer to locate in larger centres. Much of the occupier demand in smaller centres has come from the discount and charity sectors or non-retail services, rather than higher order comparison goods shopping.
- 3.24 The continuation of these trends will influence future operator requirements in North Norfolk District with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However, smaller vacant units could still be attractive to independent traders and non-retail services.

Charity and Discount Shops

- 3.25 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will end. In many centres, charity shops have occupied vacated shop premises during the recession. This trend is evident in most centres in North Norfolk. Charity shops can often afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages.

Non-Retail Services

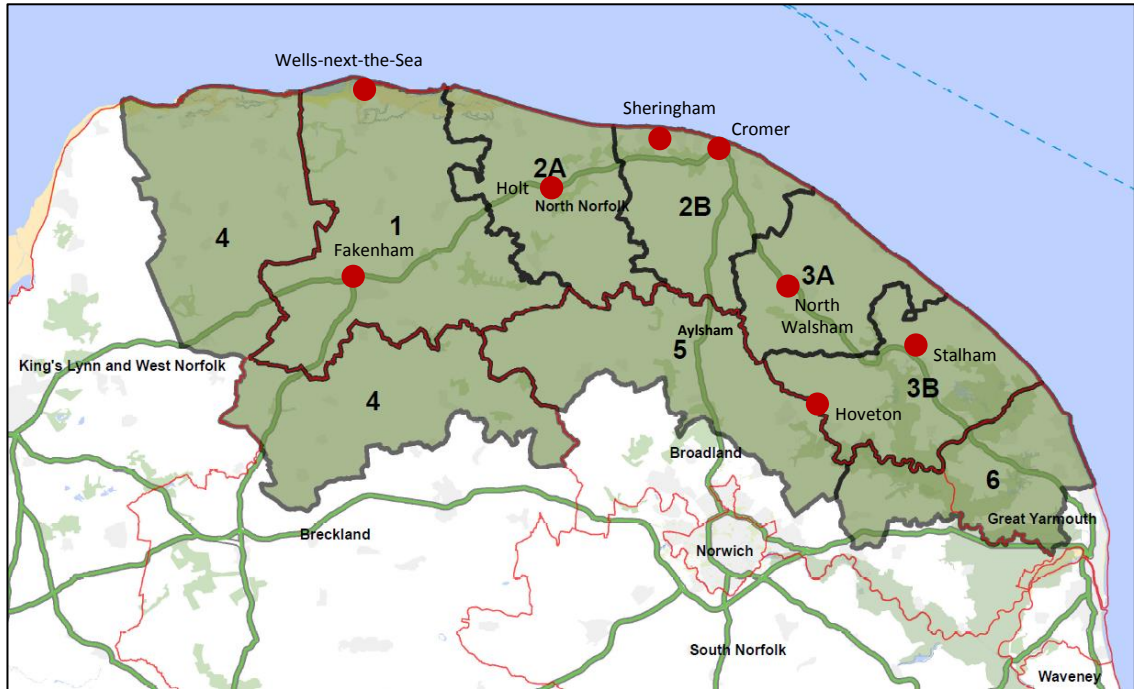
- 3.26 The growth of money lending/pay day loan shops and betting shops has also raised concerns amongst planning authorities, and has resulted in a change to permitted development rights in order to control the growth of these uses in town centres.
- 3.27 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have a short term impact on town centres. These measures allow for greater flexibility for changes of use from retail to non-retail uses e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres, in particular the amount of Class A1 space could reduce but these changes should only be temporary. The measures may lead to a reduction in vacant shop premises, particularly in peripheral shop frontages, but this could have an impact on the ability of operators to find space, in areas where demand is higher.
- 3.28 In our view it is unlikely that these changes will have a significant impact on the majority of centres within North Norfolk District, because the current vacancy rates are relatively low. The exception to this is North Walsham which has a comparatively high vacancy rate. The shop frontage policies in North Walsham town centre are relatively flexible. A review of these frontage policies is provided later in this report.
- 3.29 These trends are not new and have been affecting the high street for many years. In response to these trends, town centres have changed and diversified. The food and beverage, leisure and non-retail service sectors have been successful in occupying space no longer attractive to retail tenants. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.
- 3.30 Shopping behaviour will continue to change and the high street will need to continue to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out.

Centres in North Norfolk and the Surrounding Area

- 3.31 North Norfolk District is bounded by King's Lynn and West Norfolk, Breckland, Broadland and Great Yarmouth local authorities. Policy SS5 of the North Norfolk District Council Core Strategy (adopted September 2008) sets the retail hierarchy of North Norfolk District comprising the three larger towns of **Cromer, Fakenham** and **North Walsham** and the five smaller town centres of **Holt, Hoveton, Sheringham, Stalham** and **Wells-next-the-Sea**. These main centres and study area adopted are shown in Figure 3.2.
- 3.32 The quantitative analysis in this report is based on a defined study area (shown in Figure 3.2), which needs to cover the primary catchment areas of shopping destinations within North Norfolk District. These catchment areas extend beyond the District boundary into neighbouring

authorities. The study area is sub-divided into zones for more detailed analysis. The zones broadly reflect the catchment areas of the main centres within the District.

Figure 3.2 North Norfolk Study Area and Main Town Centres



- 3-33 The Javelin Group's Venuescore ranks over 3,500 retail destinations in the UK including town centres, malls, retail warehouse parks and factory outlet centres across the country. Each destination is given a weighted score based on the number of multiple retailers present, including anchor stores, fashion operators and non-fashion multiples. The score attached to each retailer is weighted depending on their overall impact on shopping patterns, e.g. a department store will achieve a high score. The results for the town centre destinations and other relevant centres outside of the District are shown in Table 3.1.
- 3-34 Norwich is the main regional centre at the top of the hierarchy, ranked 14th in the UK, and coupled with Kings Lynn have a strong influence on shopping patterns across North Norfolk District. Great Yarmouth is at the next tier in the hierarchy level, and is significantly larger than all the town centres in North Norfolk. Dereham also has a more significant retail offer than centres in North Norfolk District, but is less accessible from the District than Norwich and Kings Lynn, due to the better network of main roads to these centres.
- 3-35 Fakenham town centre and Sheringham town centre achieve the highest Venuescore in the District, followed by Cromer town centre. This is misleading because the Fakenham and Cromer scores exclude retail facilities outside the town centres. Fakenham and Cromer's combined scores are 56 and 41 respectively. In addition Sheringham's score is skewed by the representation of a small number of multiple operators occupying small units that primarily serve the tourist market.

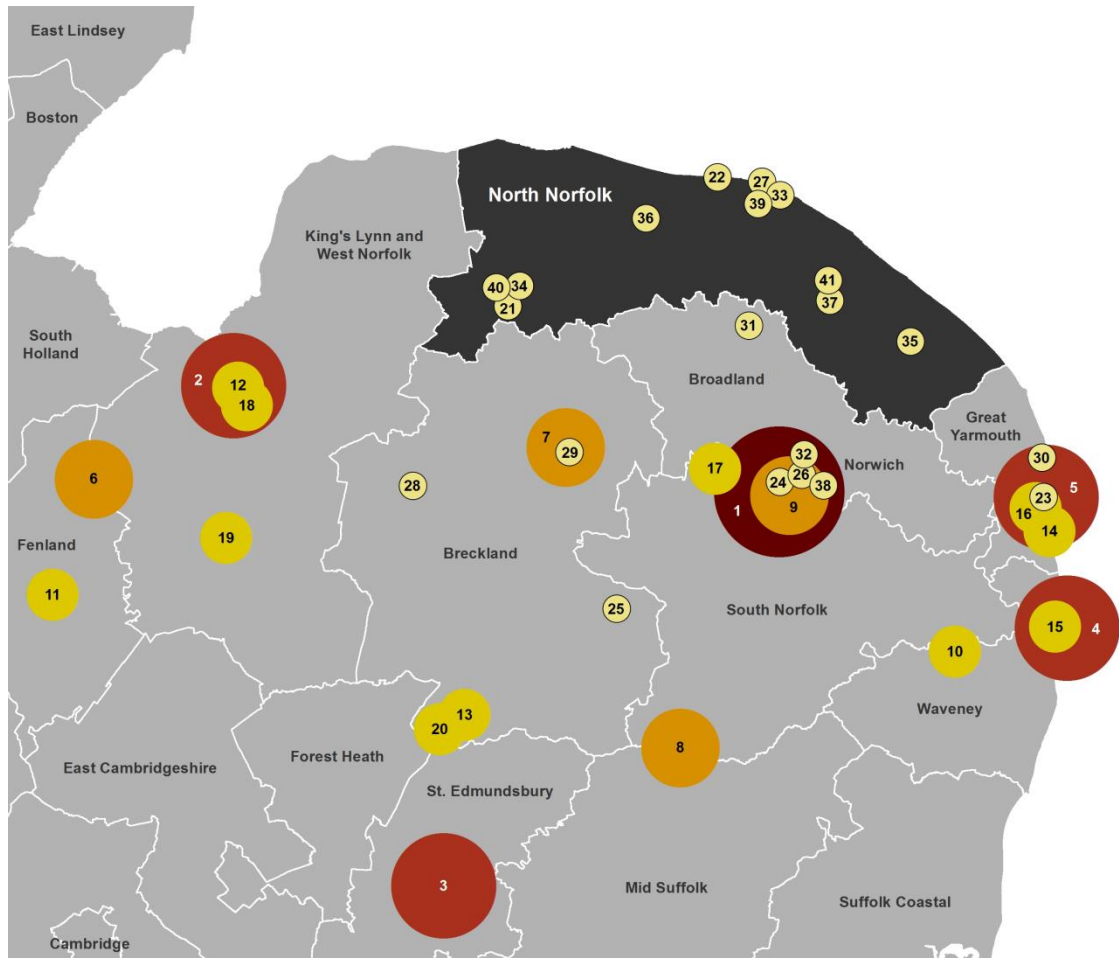
Table 3.1 Venuescore UK Shopping Index and UK Rank

Centre	Venuescore	UK Rank	Market Position
Norwich	410	14	Middle
King's Lynn	179	118	Middle
Great Yarmouth	107	242	Lower Middle
Dereham	57	530	Lower Middle
Fakenham	22	1,429	Middle
Sheringham	22	1,429	Lower Middle
Attleborough	20	1,548	Lower Middle
North Norfolk Retail Park (Cromer)	17	1,789	Lower Middle
Swaffham	16	1,908	Middle
Hunstanton	15	2,034	Middle
Caister-on-Sea	15	2,034	Lower Middle
Cromer	14	2,193	Lower Middle
Enterprise Way Industrial Estate (Fakenham)	14	2,193	Middle
Stalham	14	2,193	Lower Middle
Aylsham	14	2,193	Lower Middle
Sprowston	14	2,193	Middle
Holt	13	2,394	Upper Middle
North Walsham	13	2,394	Lower Middle
Kilverstone	11	2,827	Middle
Holt Road Industrial Estate (Cromer)	10	3,152	Middle
Fakenham, Wells Road	10	3,152	Middle
North Walsham, Bacton Road	10	3,152	Lower Middle

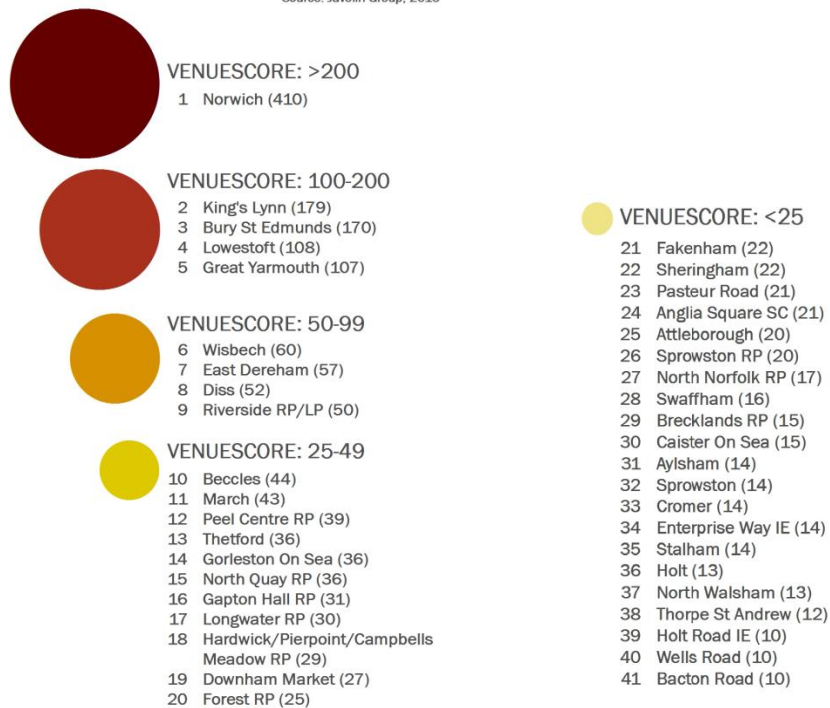
Source: Venuescore, Javelin Group 2015/16

- 3.36 Holt, Stalham and North Walsham are lower tier centres, particularly taking into account the much higher combined scores for Fakenham and Cromer. Smaller centres in the District have few multiple retailers and are not included within Venuescore's analysis, i.e. Wells-next-the-sea and Hoveton.
- 3.37 The location of Venuescore centres is shown in Figure 3.3, and this indicates that residents in North Norfolk District have good access to a number of larger centres, as well as having a choice of smaller centres to meet their day to day shopping needs.
- 3.38 It should be noted that the Venuescore data is weighted towards clothing and fashion retailing. Within the sub-region, clothing/fashion shopping facilities are primarily focused in Norwich and King's Lynn. This sector is relatively under-provided in North Norfolk's centres, which are dominated by small independent traders. As a result the Venuescore information will tend to understate the overall attraction of North Norfolk's town centres in comparison with the larger centres of Norwich and King's Lynn.
- 3.39 Javelin also assesses the market position of centres based on the retailers present and the centre's relative position along a spectrum running from discount to luxury or down-market to aspirational (i.e. lower, middle to upscale), as shown in Table 3.1. Again this information is weighted towards clothing and fashion retailing.

Figure 3.3 Venuescore Shopping Hierarchy



VENUESCORE (2015/2016): Weighted count of multiple retailer presence by venue
 Source: Javelin Group, 2016



- 3.40 This Javelin information is used in the retail industry to assess the relative strength of shopping destinations. The market position relates specifically to the fashion offer together with others easily classified operators, because the range and choice of clothing and fashion shopping is the key driver in the relative attraction of large comparison shopping destinations. Javelin also provides other measures of the strength of centres as outlined below.
- 3.41 The two main centres in the sub-region, Norwich and King’s Lynn, are categorised as has having a “Middle” market position, which suggests they cater for a wide customer base. Great Yarmouth is categorised as having a “Lower Middle” market position, which suggests it caters predominantly for less affluent customers.
- 3.42 In fashion terms, Holt has the highest market position “Upper Middle” in the District, despite its relatively low Venuescore. This indicates Holt has a good provision of high quality independent clothes fashion shops that are not recorded in the Venuescore. Fakenham is categorised below Holt in terms of fashion market position, but above Cromer, North Walsham and Sheringham, which are categorised as having a “Lower Middle” market position. In addition to its market position and Venuescore, each destination is also assessed in terms of a range of other attributes, as follows:
- 1 age focus (is the offer targeting younger or older consumers?); and
 - 2 fashionability of its offer (is the clothing offer traditional or progressive?).
- 3.43 The Javelin Group classifies retailers in terms of their “fashionability” ranging from “traditional” at one end, then “updated classic”, “fashion moderate”, “fashion forward” through to “progressive” at the other, i.e. least fashionable to the most fashionable. Shopping destinations in London dominate the most “progressive” venues, such as Carnaby Street and Bond Street.
- 3.44 The age position of the fashion offer is also classified ranging from “young”, “middle” to “old”, for example shops such as Hollister, H&M, Miss Selfridge and Superdry appealing more to the young and others such as Evans and Edinburgh Woollen Mill appealing more to the old. The results for the main centres within North Norfolk and the surrounding area are shown in Table 3.2 below.

Table 3.2 Venuescore UK Centre Fashion Attributes

Centre	Age	Fashion Position
Norwich	Old	Updated Classic
King’s Lynn	Mid	Updated Classic
Great Yarmouth	Old	Updated Classic
East Dereham	Old	Traditional
Fakenham	Mid	Traditional
Sheringham	Old	Fashion Moderate
Attleborough	Old	Traditional
Swaffham	Old	n/a
Hunstanton	Old	Traditional
Cromer	Old	Traditional
Stalham	Old	Fashion Moderate
Sprowston	Old	Fashion Moderate
Holt	Old	Updated Classic
North Walsham	Old	n/a

- 3.45 The centres within North Norfolk tend to cater predominantly for older customers, with moderate or traditional tastes. This reflects the much older age profile of residents within the District. Holt's high quality independent traders may have a wider draw, which reflects the less moderate fashion offer. Most centres within the sub-region tend to cater for older customers, with moderate or traditional tastes. No centres have a fashion forward offer.
- 3.46 The Javelin information outlines above, indicates the towns of Cromer and Fakenham are the most significant shopping destinations in the District, and have the best prospects for attracting future for growth and investment. North Walsham is the largest settlement in the District, but its town centre has a relatively low rank and market position. In general North Walsham is outperformed by some of the smaller towns in the District.
- 3.47 The towns of Sheringham, Holt, North Walsham and Stalham, are not dissimilar in terms of the Javelin indicators, however these centres have different characteristics. Holt in particular has a good high quality provision, characterised by high quality independent shops.
- 3.48 Javelin's information provides an insight into the hierarchy but other factors need to be considered, i.e. the specific role the smaller towns play needs to be considered in more detail.

4.0 Future Requirements for Retail Uses

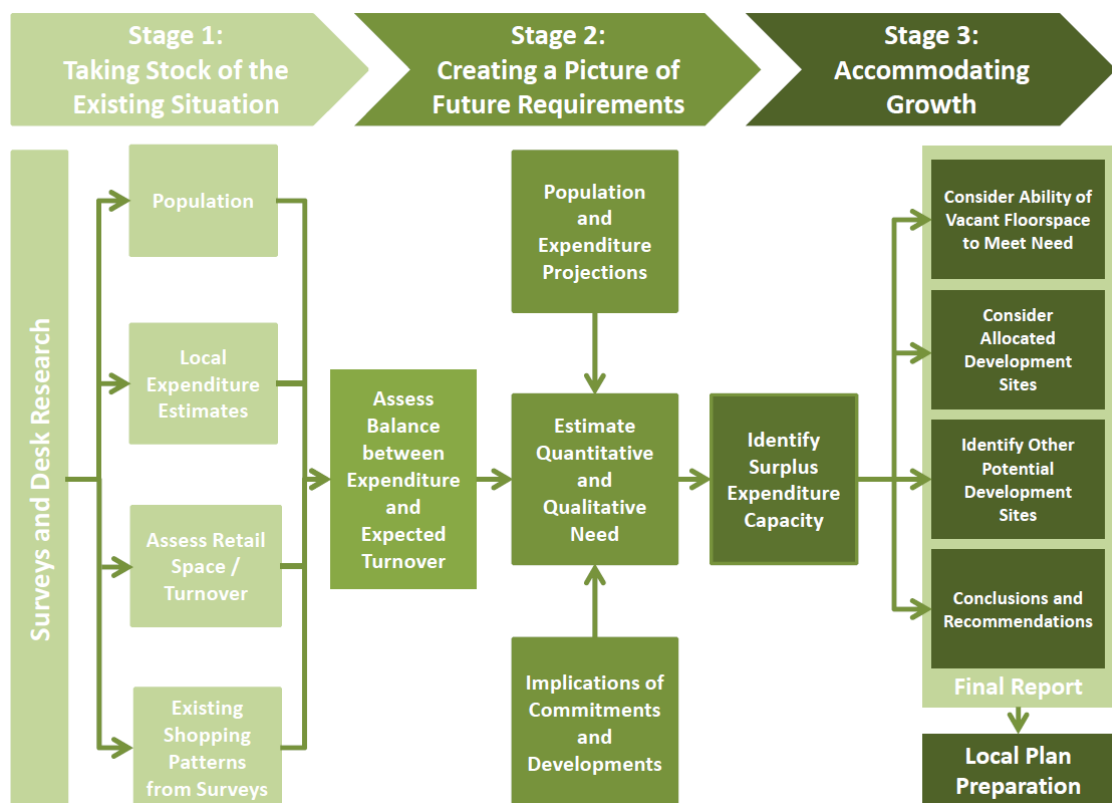
Introduction

4.1 This section assesses the need for Class A1 retail floorspace within North Norfolk District. As indicated in Section 2 the NPPF indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. This section objectively assesses the quantitative and qualitative scope for new town centre uses in North Norfolk District in the period from 2016 to 2036. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre health centres in Appendix 5.

Methodology and Base Data

4.2 The methodology is summarised in Figure 4.1. The approach adopted to produce retail projections follows the key steps identified within the Planning Practice Guidance (PPG). The approach adopts economic growth forecasts that are widely used and accepted for development plan preparation and at planning inquiries.

Figure 4.1 Methodology for Estimating Future Requirements for Retail Floorspace



4.3 Stage 1 establishes existing demand (population and expenditure) and supply (floorspace and facilities). Stage 2 assesses the balance between supply and demand and projects forward to quantify future requirements for new facilities. Stage 3 considers how future growth should be distributed and accommodated.

Price Base

- 4.4 All monetary values expressed in this study are at 2014 prices, consistent with Experian's base year expenditure figures for 2014 which is the most up to date information available.

Study Area

- 4.5 A study area has been defined to cover these catchment areas and a household telephone survey has been undertaken in order to quantify existing shopping and leisure patterns. The study area defined in the 2005 study has been reviewed, and as a result an amended study area has been adopted in this study, which better reflects the distribution of population and main centres within the District.
- 4.6 The Study Area covers the primary catchment areas of the town centres in North Norfolk. The primary catchment area is the hinterland where each town/ shopping destinations attracts the majority of its trade. The study area has been sub-divided into 8 zones as shown in Appendix 1, based on ward boundaries, reflecting the primary catchment areas of the main destinations within the District i.e. Cromer, Fakenham, Holt, Sheringham, North Walsham, Stalham, Hoveton/Wroxham and Wells next the Sea.

Population

- 4.7 The projected population within the study area between 2011 to 2036 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census, and is the most up to date information currently available. The 2011 base year population for each zone has been projected to 2036 based on the Office of National Statistics' latest 2014-based sub-national projections (published May 2016).
- 4.8 The base year 2016 population within the study area is 172,205. This population is projected to increase to 191,081 by 2036, and increase of nearly 11%. The ONS population projections have been compared with emerging growth options in the emerging Local Plan and a sensitivity analysis of the floorspace projections has been provided later in this section.
- 4.9 In addition to the resident population North Norfolk's town centres benefit from tourist visitors who do not live in the local area. The Economic Impact of Tourism North Norfolk 2015 report prepared by Destination Research indicates North Norfolk attracted 9.8 million tourist days in 2015, i.e. 7.4 million day trips and 2.4 million over-night stays. Spread throughout the year this equates to an average of 26,800 additional people within the District each day.

Retail Expenditure

- 4.10 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2014 have been obtained.
- 4.11 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 14 - November 2016) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.
- 4.12 Experian's EBS growth forecast rates for 2016 to 2018 reflect the current economic circumstances and post Brexit forecasts. Experian provides an appropriate growth rate for the

short term (for convenience goods: 0% for 2016, -0.2% for 2017 and -0.9% for 2018; for comparison goods: +3.3% for 2016, +1.4% for 2017 and +1.0% for 2018). In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0% per annum for convenience goods between 2019 to 2023, and 0.1% per annum after 2023. For comparison goods Experian recommends a growth rate of 3% per annum between 2019 to 2023, and 3.2% per annum after 2023.

- 4.13 These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.
- 4.14 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2015 is:
- 8.9% of convenience goods expenditure; and
 - 16.0% of comparison goods expenditure.
- 4.15 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2015 are:
- 2.7% of convenience goods expenditure; and
 - 12.0% of comparison goods expenditure.
- 4.16 The projections provided by Experian suggest that these percentages will increase to 3.9% and 15.6% by 2021 respectively. In the longer term, the growth is predicted to fall or reverse slightly for comparison goods. The long term projections are 5% and 16.3% by 2031. These figures have been adopted in this assessment.
- 4.17 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.
- 4.18 On-line shopping has experienced rapid growth over the last 20 years, but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Experian state that they expect that the SFT market share will continue to grow. Experian's forecasts suggest that the SFT share of total retail sales will reach 18.6% by 2022, rising to 20.4% by the mid-2030s.
- 4.19 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore,

growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

- 4.20 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2036. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3. Forecasts of food and beverage spending per capita are shown in Table 2 in Appendix 4.
- 4.21 Table 3 in Appendix 2 sets out total convenience goods within the study area up to 2036 (population multiplied by average expenditure per capita). Forecasts of comparison goods spending are shown in Table 3 in Appendix 3. Forecasts of food and beverage spending are shown in Table 3 in Appendix 4.
- 4.22 As indicated above, in addition to the resident population North Norfolk's town centres benefit from tourist visitors who do not live in the local area, estimated to be an average of 26,800 additional people within the District each day. These tourist visitors will use shops, restaurants, bars and other facilities within the District during their stay. The Economic Impact of Tourism North Norfolk 2015 report indicates that tourist visitors spend on average £9.70 per day on shopping and about £15 per day on eating and drinking. An allowance for this spending has been included within the analysis. Unfortunately the tourism study does not break down retail expenditure between comparison and convenience goods, therefore Lichfields adopts a 75:25 split. The annual expenditure for the average 26,800 visitors per day within the District is £23.72 million for convenience goods, £71.15 million for comparison goods and £146.73 million for food and beverage.
- 4.23 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 8.1% from £408.35 million in 2016 to £441.27 million in 2036, as shown in Table 3 (Appendix 2). Comparison goods spending is forecast to nearly double between 2016 and 2036, increasing from £626.96 million in 2016 to £1,185.49 million in 2036, as shown in Table 3 (Appendix 3). These figures relate to real growth and exclude inflation.
- 4.24 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on groceries does not necessarily increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

Market Shares/Penetration Rates

- 4.25 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the October 2016 household survey. The market shares for tourism expenditure are based on the broad distribution of visitor expenditure outlined in the Economic Impact of Tourism North Norfolk report, i.e. 46% urban, 26% countryside and 28% coastal, and Lichfields estimates based on tourist related facilities available within each of the eight main towns assessed during the audit of each centre.
- 4.26 The total turnover of shops within North Norfolk District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Mintel's Retail Rankings and Supermarkets UK Report (November 2015), which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

- 4.27 The results of the household shopper questionnaire survey undertaken by NEMS in October 2016 have been used to estimate existing shopping patterns within the study area zones. The tabulated results are shown in Appendix 6.
- 4.28 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone for convenience goods shopping are shown in Table 4, Appendix 2. The market shares in Table 4 are a combined rate for both main and top up shopping based on a 70:30 split between main and top-up shopping. The market shares for comparison goods shopping are shown in Table 4 in Appendix 3, and food and beverage (Class A3 to A5) are shown in Table 4 in Appendix 4.

Benchmark Turnover Levels

- 4.29 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 4.30 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, Valuation Office data and Lichfields' own on site surveys. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.
- 4.31 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within North Norfolk District and Lichfields' experience of trading levels of small independent shops informed by household shopper surveys elsewhere, an average sales density of £5,000 per sq.m net for convenience shops/stores in the District. The total benchmark turnover of identified convenience sales floorspace within North Norfolk District is £235.87 million (Table 11, Appendix 2).
- 4.32 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. Based on Lichfields' experience, the average sales density for high street comparison retailers usually ranges between £5,000 to £8,000 per sq.m net. The average sales density for food and beverage outlets is usually around £5,000 per sq.m gross.

Existing Spending Patterns

Convenience Shopping

- 4.33 The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. A summary of food and grocery shopping patterns for main food shopping trips for selected stores only is shown in Table 4.1. Results are provided for the District (Zones 1 to 3B), the outer zones (4 to 6) and the study area as a whole (see total column) and results for the study area as a whole are shown in Figure 4.2.
- 4.34 The survey results indicate a relatively limited level of cross flows of main food shopping trips to and from North Norfolk District. Food stores in North Norfolk District retain a reasonable proportion of main food and grocery shopping trips generated by residents in the District (Zones 1, 2A, 2B, 3A and 3B). Households in the District have good access to a number of large food stores.

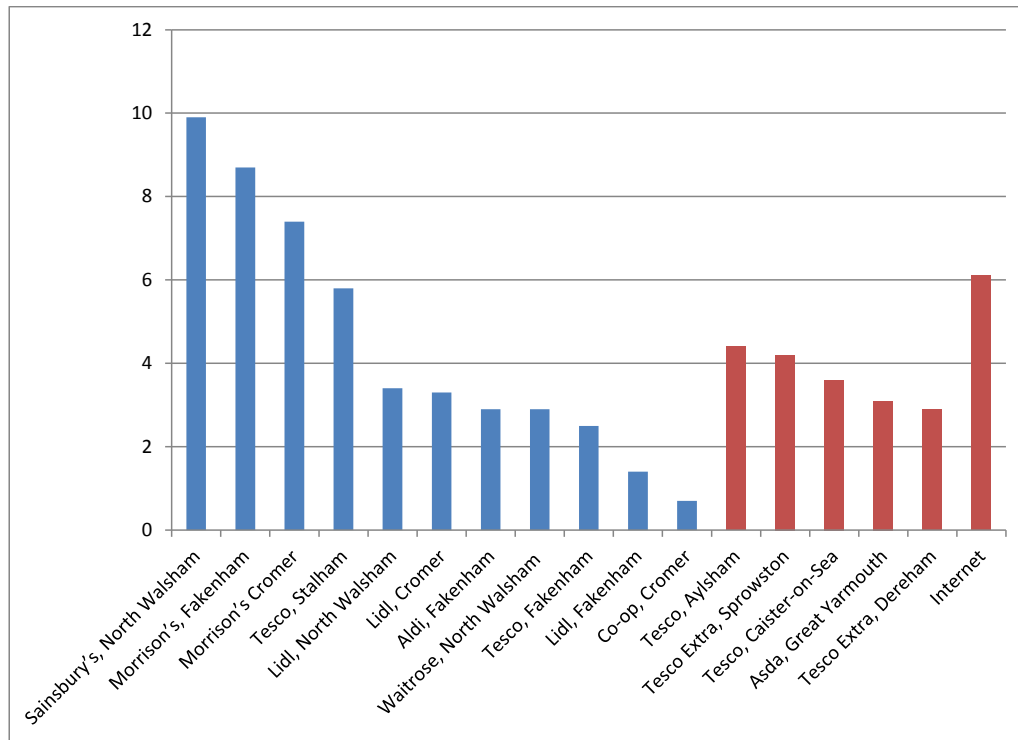
Table 4.1 Main Food and Grocery Destinations (most used by respondents)

Destination	% Market Share in each Area		
	North Norfolk	Outer Zones	Total
Sainsbury's, North Walsham	14.3	3.5	9.9
Morrison's, Fakenham	12.2	3.5	8.7
Morrison's Cromer	12.2	0.0	7.4
Tesco, Stalham	9.5	0.3	5.8
Lidl, North Walsham	5.8	0.0	3.4
Lidl, Cromer	4.1	1.6	3.3
Aldi, Fakenham	3.5	2.2	2.9
Waitrose, North Walsham	3.3	0.9	2.9
Tesco, Fakenham	2.9	1.9	2.5
Lidl, Fakenham	2.4	0.6	1.4
Co-op, Cromer	1.1	0.3	0.7
Tesco, Aylsham	1.0	9.7	4.4
Tesco Extra, Sprowston	1.0	8.8	4.2
Tesco, Caister-on-Sea	0.0	9.1	3.6
Asda, Great Yarmouth	0.8	6.3	3.1
Tesco Extra, Dereham	0.9	6.9	2.9
Internet	6.8	5.3	6.1

Source: NEMS Household Survey October 2016

- 4.35 Table 4 (Appendix 2) indicates the proportion of total convenience goods expenditure (main and top up trips) within each zone attracted to each destination. North Norfolk District retains between 78% and 93% of convenience goods expenditure within five zones in the District. The lowest retention rate (78%) is Zone 3B (Stalham/Hoveton), where leakage to Norwich is significant. The highest retention rate (93%) is Zone 3A (North Walsham). Retention rates are also around 90% in Zone 1 (Fakenham/Wells), Zone 2A (Holt) and Zone 2B (Sheringham/Cromer).
- 4.36 The level of convenience goods expenditure attracted to shops/stores in North Norfolk District in 2016 is estimated to be £255.51 million as shown in Table 5, Appendix 2, applying the market shares set out in Table 4. This includes £23.72 million generated by tourist visitors who live outside the study area, the distribution of this tourist expenditure is shown in penultimate column of Table 5 in Appendix 2. In total the main settlements attract £237.4 million, and the remaining £18.11 million is spent within local shops with villages.
- 4.37 The total benchmark turnover of identified existing convenience sales floorspace within the main settlements in North Norfolk District is £235.87 million (Table 11, Appendix 2), compared with the actual turnover of £237.4 million in 2016. Overall North Norfolk has a high retention of convenience good expenditure and there is only limited potential to increase this level of retention. The base year figures suggest that convenience goods retail sales floorspace in the main settlements in the District is collectively trading around the national average, and appears to be trading satisfactorily, with a small expenditure surplus (£1.53 million in 2016), the difference between the actual spending at retail facilities in the District and the benchmark turnover of the facilities. A breakdown for each town is set out in Table 4.2.

Figure 4.2 Main Food Shopping Destinations % Market Share in Study Area



Source: NEMS Household Survey October 2016

Table 4.2 Convenience Goods Expenditure at 2016 – Deficit/Surplus £Millions

Destination	Expenditure (+ Surplus / - Deficit)	Index Benchmark = 100
Cromer	- 6.11	88
Fakenham	- 4.45	93
Holt	+ 0.15	101
North Walsham	+ 7.68	115
Sheringham	+ 4.52	122
Hoveton/Wroxham	- 2.08	84
Stalham	+ 1.80	110
Well next the Sea	+ 0.03	100
Total	+1.53	

Source: Table 13 Appendix 2.

4.38 Facilities within Cromer, Fakenham and Hoveton are trading below benchmark levels, which suggest existing floorspace can absorb future expenditure growth. Holt and Wells next the Sea are trading around their benchmark. A new Aldi store is proposed in Holt, which is expected to reduce trading levels in other towns. The implications of this proposed store is addressed later.

4.39 Convenience goods facilities in North Walsham, Sheringham and Stalham appear to be trading healthily above benchmark levels. Surplus expenditure in these towns could support future improvements in provision. However in overall terms the global surplus is only £1.53 million and there is limited unmet expenditure capacity due to stores over-trading. A qualitative analysis of convenience good provision is set out later in this section.

Comparison Shopping

- 4.40 A summary of comparison goods shopping patterns is shown in Table 4.3. Results are again provided for the District, outer zones and the study area as a whole. The retention of comparison good shopping trips within North Norfolk is lower than for convenience good shopping. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and travel longer distances to visit larger centres (primarily Norwich) that have more range and choice of shops.
- 4.41 Households have good access to Norwich and to a lesser extent Great Yarmouth and Kings Lynn. The regional catchment area of Norwich includes North Norfolk District. The ability to increase North Norfolk's comparison goods market share will be constrained by Norwich's regional draw. The survey results indicate that Fakenham, Cromer and North Walsham are the main comparison shopping destinations in the District in terms of market share, but no single destination dominates. Sheringham and Holt are also important comparison shopping destinations.
- 4.42 Table 4 (Appendix 3) sets out the proportion of comparison goods expenditure within each zone that is spent within North Norfolk District. North Norfolk District retains between 21% and 55% of comparison goods expenditure within five zones in the District. The highest retention rate (55%) is Zone 2B (Sheringham/Cromer), followed by (50%) in Zone 1 (Fakenham/Wells), (47%) in Zone 2A (Holt) and (43%) in Zone 3A (North Walsham). The lowest retention rate (21%) is Zone 3B (Stalham/Hoveton), where leakage to Norwich is significant (62%).
- 4.43 The estimated comparison goods expenditure currently attracted by shopping facilities within North Norfolk is £236.84 million in 2016, as shown in Table 5, Appendix 3, of which £71.15 million is generated by tourist visitors. This relatively high tourist spend reflects the mix of retail outlets in many of the District's towns. In terms of resident expenditure North Norfolk retains about 44% of comparison goods expenditure (£142.55 million in 2016) within the District and 10% within the outer zones (£23.13 million).

Table 4.3 Non-Food Shopping (main destinations named by respondents)

Destination	% Market Share in each Area		
	North Norfolk	Outer Zones	Total
Fakenham	7.7	3.5	6.1
Cromer	8.1	0.3	5.1
North Walsham	6.3	0.9	4.2
Sheringham	4.8	-	2.9
Holt	3.5	0.6	2.4
Hoveton/Wroxham	1.5	0.6	1.1
Stalham	1.5	-	0.9
Wells-next-the-Sea	0.6	-	0.4
Norwich	42.8	41.5	42.2
Great Yarmouth	1.9	13.8	6.7
Aylsham	0.4	7.9	3.6
King's Lynn	3.1	3.2	3.2
Various	2.1	2.8	2.4
Internet	11.8	11.0	11.5

Source: NEMS Household Survey October 2016

4.44 The average sales density for existing comparison goods sales floorspace in the District (45,070 sq.m net) is £4,887 per sq.m net as shown in Table 4.4. By way of comparison the average comparison goods sales density calculated by Lichfields within the Breckland Retail Study Update 2014 was £3,913 per sq.m net, projected to increase to £4,234 per sq.m net in 2016. The Harborough Retail Study 2013 suggested an average of £4,277 per sq.m net projected to increase to £4,627 per sq.m net in 2016. Lichfields' North Hertfordshire Retail Update 2016 suggested an average sales density of £5,261 per sq.m net. The Breckland average is possibly lower than the North Norfolk average due to the higher provision of retail warehouse floorspace (36% of total sales floorspace) compared with (28%) North Norfolk. Retail warehouse floorspace tends to trade at a lower density than high street shop floorspace.

4.45 Table 4.4 indicates that trading levels amongst comparison facilities in North Norfolk vary throughout the District. The Fakenham average is relatively low due to the high proportion (56%) of bulky goods retail warehouse floorspace (e.g. B&Q and Aldiss). The North Walsham average is relatively high due to the high proportion of comparison goods sales in large food stores (32% of the total). The average in most other centres is between £4,700 to £5,600 per sq.m net. The average sales density is relatively low (around £3,000 per sq.m net) within Stalham and Wells next the Sea, because these centres have very few multiple retailers, and reflects their more limited comparison shopping role within the retail hierarchy.

Table 4.4 Comparison Goods Average Sales Density 2016

Destination	Average Sales Density Per Sq.M Net
Fakenham	£3,975
Cromer	£5,614
North Walsham	£7,496
Sheringham	£5,433
Holt	£4,832
Hoveton/Wroxham	£4,753
Stalham	£3,219
Wells-next-the-Sea	£2,940
Average	£4,887

Source: Tables 5 and 10 in Appendix 3.

4.46 Based on Lichfields' recent experience across the country average sales densities for comparison floorspace can vary significantly. Average sales densities around or above £7,000 per sq.m net are usually only achieved by very successful shopping centres. Smaller centre, usually where the property costs are much lower, do not normally achieve these high sales densities. Average sales densities of between £3,000 to £6,000 per sq.m net are generally achieved in smaller centres.

4.47 Overall trading levels are reasonable in the District, particularly when compared with neighbouring Breckland District. Existing floorspace appears to be trading satisfactorily in difficult market conditions. There is no evidence to suggest existing comparison sales floorspace is over-trading, or that there is surplus comparison expenditure available to support new development at present.

Future Retail Potential

Capacity for Future Convenience Goods Floorspace

- 4.48 An Aldi food store has planning permission in Holt. This commitment has been taken into account within the retail capacity assessment and will affect future shopping patterns and the capacity for further retail development. Future market shares taking into account the proposed Aldi store in Holt are shown in Table 6 in Appendix 2. The future level of available convenience goods expenditure at 2021, 2026, 2031 and 2036 is shown at Tables 7 to 10 in Appendix 2.
- 4.49 The total level of convenience goods expenditure available for shops in the District between 2016 and 2036 is summarised in Table 12 (Appendix 2). Convenience expenditure available to shopping facilities in the District is expected to increase from £255.51 million in 2016 to £277.82 million in 2036.
- 4.50 Table 13 subtracts the benchmark turnover of existing floorspace and commitments from available expenditure to calculate the amount of surplus expenditure that may be available for further development. Within the District, there is a small existing expenditure surplus of £3.4 million convenience goods expenditure. This surplus will become a small deficit of -£4.36 million in 2021 due to low expenditure growth and the implementation of the Aldi store at Holt. Future term growth (primarily population growth) produces a surplus of £1.86 million in 2026, increasing to £8.7 million in 2031 and £15.17 million in 2036.
- 4.51 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 13. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £11,000 per sq.m, the approximate average turnover density of the main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops.
- 4.52 There is a projected expenditure deficit in Cromer, Fakenham, Holt (taking the proposed Aldi into account and Hoveton/Wroxham). The deficit in Cromer counter-balances most of the expenditure surplus in nearby Sheringham. In the other main settlements, surplus convenience goods expenditure could support a small amount of additional floorspace in line with population growth. The figures are summarised in Table 4.5.

Table 4.5: Summary of Convenience Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Cromer	0	0	0	0
Fakenham	0	0	0	0
Holt	0	0	0	0
North Walsham	923	1,124	1,345	1,553
Sheringham	517	588	666	740
Hoveton/Wroxham	0	0	0	0
Stalham	254	323	399	471
Wells-next-the-Sea	-	11	25	39
Other North Norfolk	0	0	11	59

Source: Table 13 in Appendix 2.

Capacity for Future Comparison Goods Floorspace

- 4.53 The household survey suggests that the District's retention of comparison goods expenditure is much lower than for convenience goods. The lower level of comparison expenditure retention is

due to the strength of competing comparison goods facilities in nearby authorities, in particular Norwich.

- 4.54 Future improvements to comparison retail provision within the district could help to claw back some additional expenditure leakage from the study area. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the district to increase their market share of expenditure significantly. Some retail development will be necessary in North Norfolk in order to maintain existing market share in the future. Town centre strategies could focus on maintaining market share for the district, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.
- 4.55 For the purposes of this assessment, the existing comparison goods floorspace is estimated to be trading at equilibrium in 2016 (i.e. satisfactory levels). Table 11 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian (Retail Planner Briefing Note 14 – November 2016). Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. The projected turnover of existing floorspace is subtracted from the expenditure projections to provide an estimate of surplus expenditure available to support new floorspace. At present there are no major comparison goods commitments within the District, which may imply current operator demand for new floorspace is weak.
- 4.56 At 2021 there is a small comparison expenditure surplus of £2.03 million, taking into account the comparison sales within the proposed Aldi store in Holt. By 2026, future growth generates an expenditure surplus of £23.96 million, which will grow to £52.67 million by 2031 and £88.38 million by 2036.
- 4.57 The comparison goods expenditure surplus is converted into net comparison sales floorspace projections at Table 14 in Appendix 3, adopting an average sales density of £6,000 per sq.m net in 2016, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2026 (£23.96 million) could support 3,275 sq.m net of sales floorspace (4,367 sq.m gross). The figures are summarised in Table 4.6.

Table 4.6: Summary of Comparison Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Cromer	178	1,182	2,299	3,464
Fakenham	161	1,042	2,029	3,053
Holt	0	297	852	1,431
North Walsham	80	559	1,103	1,670
Sheringham	73	457	870	1,301
Hoveton/Wroxham	56	342	643	957
Stalham	20	137	268	404
Wells-next-the-Sea	15	84	153	226
Other North Norfolk	48	268	483	710

Source: Table 14 in Appendix 3.

Population Sensitivity Analysis

- 4.58 The council is currently preparing a new Local Plan and based on the SHMA, January 2016 and emerging figures, the retail capacity assessment has been re-run as a sensitivity analysis based

on the 8,500 dwelling projection for the District. The ONS projection is based on 7,731 dwellings during the plan period. To reflect this increase in dwellings, population growth has been increased by 9.9% in Zones 1-3. The sensitivity analysis shows the difference in terms of retail floorspace capacity is relatively insignificant bearing in mind it is a 20 year projection, as follows:

- Convenience goods 2036 projection = 2,279 sq.m gross up from 1,970 sq.m gross;
- Comparison goods 2036 projection = 13,604 sq.m gross up from 13,217 sq.m gross.

4.59 The re-distribution of population makes little difference and the figures increase slightly for all centres.

Qualitative Need for Retail Floorspace

4.60 The section above quantifies the theoretical capacity to support new retail floorspace within North Norfolk, based on the population and expenditure projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:

- the diversity of uses and deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- levels of expenditure retention and leakage;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Existing Retail Provision in North Norfolk District

4.61 As part of the study an audit of the existing retail and service provision in the main centres and comparison to the UK average was undertaken in September 2016. These assessment are detailed and in Appendix 5. A summary of existing retail provision is provided in Table 4.7.

Table 4.7 Core Strategy Retail Hierarchy

Centre	Retail Hierarchy	Town Centre Class A1-A5 Units	Convenience Sq.M Net Sales Floorspace *	Comparison Sq.M Net Sales Floorspace *
Fakenham	Large town centre	130	6,651	12,540
Cromer	Large town centre	181	5,539	10,270
North Walsham	Large town centre	110	5,088	3,491
Holt	Small town centre	164	1,510	6,739
Sheringham	Small town centre	162	2,310	4,350
Hoveton/Wroxham	Small town centre	58	1,692	4,000
Stalham	Small town centre	73	1,910	2,030
Wells-next-the-Sea	Small town centre	82	933	1,650
Total		960	25,633	45,070

Source: Lichfields' Analysis October 2016

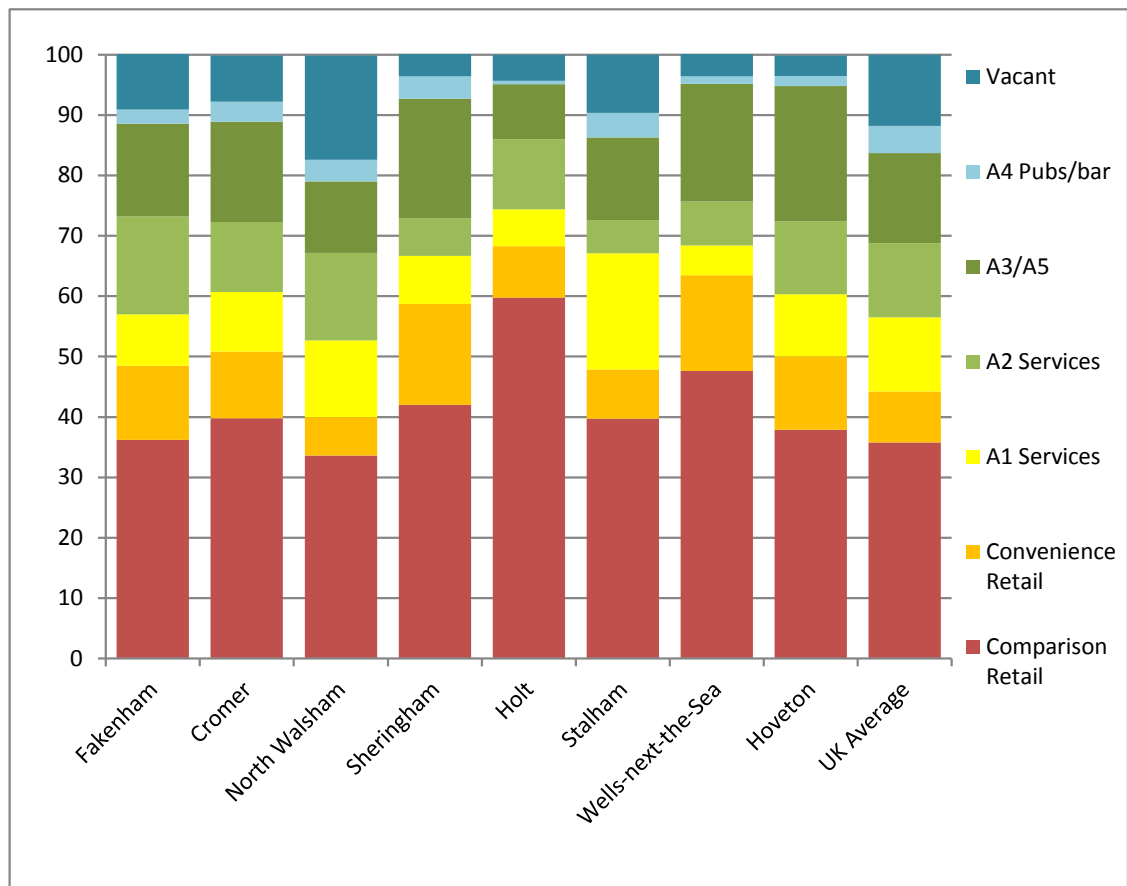
* includes out of centre food stores and retail warehouses

4.62 Fakenham and Cromer are the largest shopping destinations within the District with retail sales floorspace of 19,191 sq.m net and 15,809 sq.m net respectively. These floorspace figures include

edge/out of centre food stores and retail warehouses in addition to facilities within the defined town centres.

- 4.63 Figure 4.3 shows the proportional mix of Class A within the eight town centres (excluding out of centre food stores and retail warehouses). The mix of Class A units has been compared with Goad Plan national average based on recent land use surveys for over 1,250 town centres across the country. It should be noted that the Goad national average a full range of large, medium and small centres throughout the UK. Smaller centres tend to have a lower proportion of Class A1 comparison shops than larger centres, and conversely a higher proportion of convenience retailing and non-retail services. Nevertheless the comparison with the national average data provides a useful benchmark.
- 4.64 The mix of uses in most centres is broadly consistent with the Goad national average. All centres have a reasonable proportion of comparison goods shops when compared with the national average. Holt has a particularly strong comparison goods offer due to the large number of independent specialists. Conversely Holt has a relatively low provision of convenience retail facilities and A1 non-retail services.
- 4.65 The vacancy rate is lower than the national average in all centres with the exception of North Walsham. The provision of Class A3/A5 is particularly strong in Hoveton/Wroxham, Wells-next-the-Sea and Sheringham, reflecting the role of the centres as tourist destinations.
- 4.66 A more detailed audit of the town centre is contained within Appendix 5.

Figure 4.3 Mix of Class A Uses in North Norfolk's Main Centres



Source: Lichfields' Survey (September 2016) and Goad National averages for town centres

Convenience Goods Shopping

- 4.67 Most household undertake two types of food and grocery shopping trips i.e. a weekly or less frequent main or bulk shopping trip and more regular top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of main shopping trip. Accessibility and convenience are more important for top up shopping trips.
- 4.68 **Cromer** and **Sheringham** are located in Zone 2B and their primary catchment areas overlap. Residents in Zone 2B have good access to four relatively large food stores that are suitable for main and bulk food shopping, i.e. Morrison's (2,526 sq.m net), Lidi (1,030 sq.m net) and Co-op (1,087 sq.m net) in Cromer, and Tesco (1,355 sq.m net) in Sheringham. These larger stores are supported by three smaller supermarkets/convenience stores: Budgen's (746 sq.m net) and Iceland (446 sq.m net) in Cromer and Sainsbury's Local in Sheringham, which cater primarily for top-up shopping trips. Both town centres have a high proportion of convenience goods shop units when compared with the Goad national average.
- 4.69 In terms of convenience goods expenditure retention, Cromer and Sheringham retain over 80% within Zone 2B. There is some cross flow of expenditure to Fakenham and North Walsham, but over 90% of expenditure is retained within the District. The household survey results indicate a very small number (5 in total) of respondents mentioned the need for more food stores in Cromer or Sheringham. Based on the choice of food stores, mix of uses in the town centres, the high expenditure retention and the results of the household survey, the Cromer and Sheringham area is well served in terms of convenience goods shopping provision.
- 4.70 **Fakenham** and **Wells-next-the-Sea** are located in Zone 1. Convenience shopping provision in Wells-next-the-Sea is above the Goad national average in terms of the proportion of shop units, but there are no large food stores (over 1,000 sq.m net) suitable for bulk food shopping. Three small convenience stores Co-op, Nisa and Londis cater for top-up and basket shopping needs, supported by a small number of independent shops. Most residents in the town will look to Fakenham for their main and bulk food shopping needs.
- 4.71 In terms of bulk/main food shopping residents in Zone 1 have good access to four relatively large food stores in Fakenham i.e. Morrison's (2,656 sq.m net), Tesco (2,033 sq.m net), Aldi (1,051 sq.m net) and Lidi (970 sq.m net). Fakenham has a high proportion of convenience goods shop units when compared with the Goad national average.
- 4.72 In terms of convenience goods expenditure retention, Fakenham and Wells-next-the-Sea retain over 82% within Zone 1, and nearly 92% of expenditure is retained within the District. The household survey results indicate a very small number (4 in total) of respondents mentioned the need for more food stores in Fakenham and Wells-next-the-Sea. Based on the choice of food stores, mix of uses in the town centre, the high expenditure retention and the results of the household survey, Fakenham is well served in terms of convenience goods shopping provision. Wells-next-the-Sea is adequately served in terms of top-up food and grocery shopping, but relies on larger stores in Fakenham for main/bulk food shopping.
- 4.73 **Holt** is located in Zone 2A. Convenience shopping provision in Holt is comparable with the Goad national average in terms of the proportion of shop units, but Budgen's is the only large food store (1,033 sq.m net) suitable for bulk food shopping. This store is supported by a Premier convenience stores and a number of independent shops.
- 4.74 Holt only retains 24% of convenience goods expenditure in Zone 2A. Large food stores in Fakenham (26%), Cromer (24%) and Sheringham (10%) attract expenditure from Zone 2A. Expenditure retention within the District is high (90%). In total 23 respondents to the household survey suggested more food stores would make them shop more often within Holt,

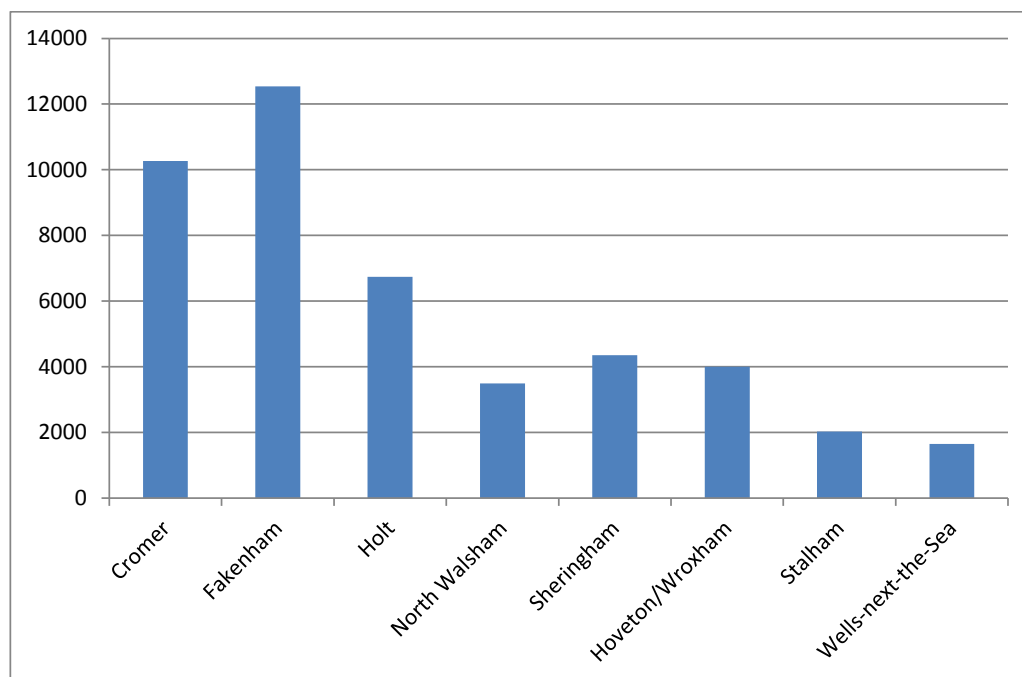
much higher than the results for all other centres. Holt is adequately served in terms of top-up food and grocery shopping, but relies on larger stores in Fakenham, Cromer and Sheringham for main/bulk food shopping. A proposed Aldi store (1,140 sqm.net) at Old Station Way in Holt has planning permission. The new Aldi store should help to address this qualitative need for main/bulk food shopping provision in Holt.

- 4.75 **North Walsham** is located in Zone 3A. Convenience shopping provision in North Walsham town centre is just below the Goad national average in terms of the proportion of shop units, but the town has large stores on the edge of the town centre and out-of-centre. The choice of stores suitable for main/bulk food shopping is excellent i.e. Sainsbury's (3,006 sq.m net), Waitrose (1,507 sq.m net) and Lidl (1,373 sq.m net). North Walsham retains 79% of convenience goods expenditure in Zone 3A, and 93% is retained within the District. The town is well served in terms of convenience goods shopping provision.
- 4.76 **Stalham** and **Hoveton/Wroxham** are located in Zone 3B. Both are small centres with a limited number of convenience goods shops. The Tesco store in Stalham (1,689 sq.m net) is suitable for main/bulk food shopping. In Hoveton the Roys of Wroxham store also has a large food hall suitable for main/bulk food shopping. For towns of their size food store provision is adequate, although choice is limited.
- 4.77 Stalham and Hoveton/Wroxham retain a reasonable proportion (54%) of convenience goods expenditure in Zone 3B. There is some cross flow of expenditure to North Walsham, but over 78% of expenditure is retained within the District. There is some expenditure leakage to Norwich (11%) and Great Yarmouth (7%), but this reflects the over-lapping catchment areas of these larger centres.
- 4.78 In summary, food store and convenience retail provision is particularly strong in the Cromer/Sheringham area, Fakenham and North Walsham. Provision Wells-next-the-Sea is limited to top up food shopping, but residents in this area have good access to large stores in Fakenham, and this small settlement's population is unlikely to support a large food store. Stalham and Hoveton/ Wroxham have good provision for towns of their size, and residents also have access to larger stores in North Walsham, Norwich and Great Yarmouth.
- 4.79 Holt is the most obvious area of qualitative deficiency in food store provision in North Norfolk District. The proposed Aldi store will help to address this deficiency and will reduce expenditure leakage to surrounding towns.

Comparison Shopping

- 4.80 Within the main 8 towns centres in North Norfolk there are 412 comparison shops, which when edge and out of centre facilities are taken into account, provide a total comparison goods sales floorspace of over 45,000 sq.m net. Figure 4.4 indicated that Cromer and Fakenham are the main comparison shopping centres in North Norfolk, and provide a reasonable range and choice of comparison goods shopping facilities.

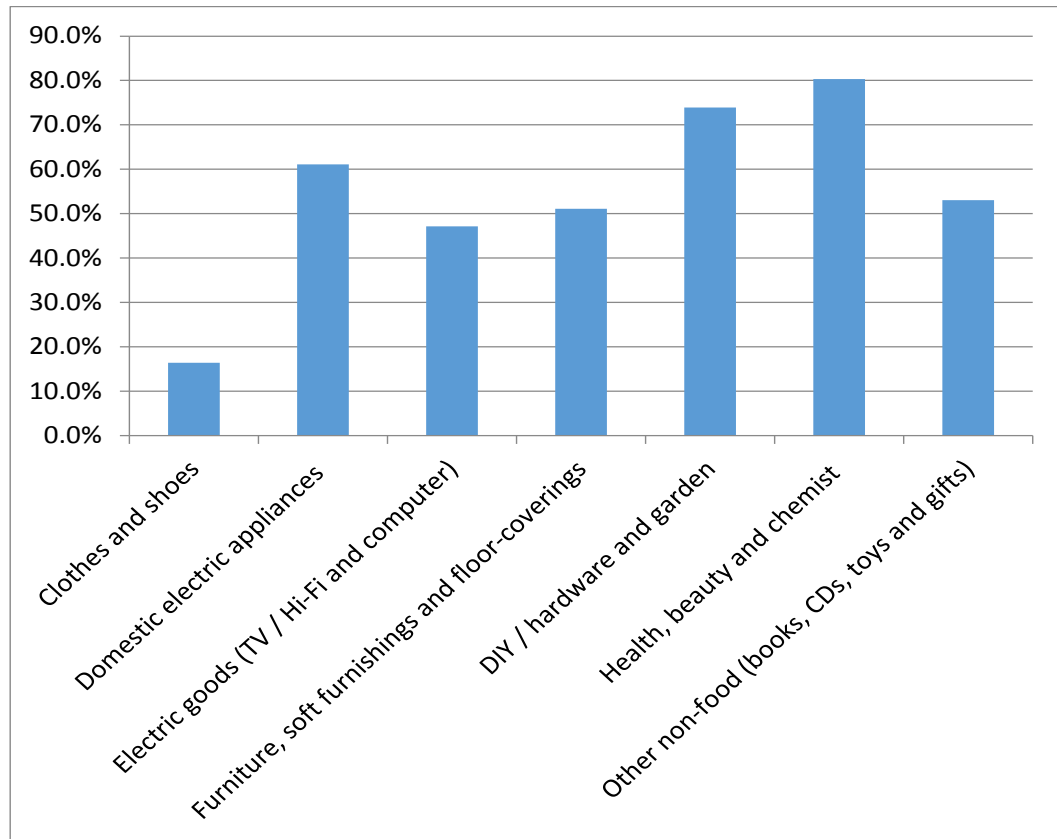
Figure 4.4 Comparison Goods Retail Sales Floorspace in North Norfolk (Sq.M Net)



- 4.81 As shown in Figure 4.3 earlier, the proportion of Class A1 comparison good shops in the 8 main town centres is comparable or above the Goad Plan national average. Holt and Wells next-the-Sea have a particularly high proportion of comparison goods shops, boosted by trade from tourist visitors.
- 4.82 The comparison good retail offer is predominantly small (less than 100 sq.m net) independent specialist traders, particularly within the smaller centres. There is a selection of larger multiple comparison retailers in Fakenham and Cromer, and to a lesser extent Sheringham where the multiple outlets are generally small. North Walsham as the largest settlement in the District under performs in relation to comparison shopping provision when compared to other towns, which suggests the town is deficient in qualitative terms. Holt has some high quality multiple outlets (e.g. Joules and Fat Face) and Bakers & Larners department store. Multiple outlets within the smaller centre are primarily charity shops.
- 4.83 North Norfolk District has a reasonable provision of retail warehouses. The three main retail parks (North Norfolk Retail Park, Enterprise Way Industrial Estate and Holt Road Industrial Estate). The provision of DIY stores includes the main operators i.e. B&Q, Jewsons, Homebase, Screwfix, Topps Tiles and All Tiles. The furniture/soft furnishing sector is represented by MO Williams Carpets and Aldiss. The electrical sector is represented by Hughes. Other outlets include Halford and an Argos. Residents in the District also have good access to major retail warehouse parks in Norwich. The household survey results indicate that North Norfolk District retains a relatively high market share of DIY/hardware expenditure, but a lower market share for electrical goods, furniture, soft furnishings and floor-covering. These results reflect the choice of retail warehouses in the District and the draw of large retail parks in Norwich.
- 4.84 Many of the towns benefit from tourism, in particular Holt, Sheringham and Wells next-the-Sea. These centres have a wide appeal and contain a mix of traditional high street shops and specialist serving the different tourist market e.g. gift shops and fancy goods.
- 4.85 The household survey results suggest North Norfolk retains 44% of comparison good expenditure within the District (Zones 1 to 3B). Based on our experience this level of retention is

typical of rural district that lie within the sub-regional catchment area of larger centres. A breakdown of expenditure retention is shown in Figure 4.5.

Figure 4.5 Comparison Goods Expenditure Retention in North Norfolk District



Source: NEMS Household Survey (last shopping destination for comparison goods)

4.86 The results shown Norfolk Norfolk has a reasonably high level of expenditure retention for most product categories, but a low retention for clothing and shoes. Clothing and footwear are generally higher order comparison goods that tend to be bought comparison goods on an occasional basis, where customers are most likely to shop around and compare products in different shops. Larger shopping destinations such as Norwich tend to be the predominant destination for these types of shopping trips. Customers are usually prepared to tend to travel further to purchase these items and would not expect to find a wide choice within smaller local centres.

4.87 **Cromer** and **Sheringham** are located in Zone 2B and their primary catchment areas overlap. In combination these town centres provide 140 comparison goods shops. The proportion of comparison good shops is above the national average in both centres. These shops along with out of centre retail warehouses in Cromer provide a total comparison goods sales area of 14,620 sq.m net. In terms of comparison goods expenditure retention, Cromer and Sheringham retain nearly 50% within Zone 2B. There is some cross flow of expenditure to Fakenham and Holt, but 45% of expenditure leaks from Zone 2B to locations outside the District, due to the regional draw of Norwich. Based on our experience this level of retention (50%) is typical of small rural towns that lie within the sub-regional catchment area of large centres.

4.88 **Fakenham** and **Wells-next-the-Sea** are located in Zone 1. These town centres provide 86 comparison goods shops. The proportion of comparison good shops is above the national average in both centres. Including out of centre retail warehouses in Fakenham total

comparison goods sales area is 14,190 sq.m net. Fakenham and Wells-next-the-Sea retain 41% of comparison goods expenditure within Zone 1. There is a cross flow of expenditure to Holt. In total 50% of expenditure leaks from Zone 1 to locations outside the District. Again this level of leakage is not unusual for small rural towns.

- 4.89 **Holt** is located in Zone 2A and provides 98 comparison goods shops. The proportion of comparison good shops is significantly above the national average. Total comparison goods sales floorspace in Holt is 6,739 sq.m net, much lower than in Fakenham and Cromer due to the predominance of small specialist shops. Holt retains only 21% of expenditure within Zone 2A, but there are significant cross flows of expenditure to Fakenham and Cromer, which suggests a combination of three centres serve Zone 2A. Around 52% of expenditure leaks from Zone 2A to locations outside the District, predominantly Norwich.
- 4.90 **North Walsham** is located in Zone 3A. Comparison goods shopping provision (37 shops) in North Walsham town centre is just below the Goad national average in terms of the proportion of shop units. Total comparison goods sales floorspace in North Walsham is 3,491 sq.m net. North Walsham retains 28% of expenditure within Zone 3A. Zone 3A is also served by Cromer (10% crossflow). Around 57% of expenditure leaks from Zone 3A to locations outside the District, predominantly Norwich.
- 4.91 **Stalham** and **Hoveton/Wroxham** are located in Zone 3B. Both are small centres with a limited number of comparison goods shops (51 shops in total). The combined total comparison goods sales floorspace is about 6,000 sq.m net, of which over half is provided in Roys of Wroxham.
- 4.92 In terms of comparison goods expenditure retention, Stalham and Hoveton/Wroxham retain less than 15% within Zone 3B. There is limited crossflow of expenditure to North Walsham and Cromer. Around 79% of expenditure leaks from Zone 3B to locations outside the District, primarily Norwich and Great Yarmouth.
- 4.93 In summary, comparison goods retail provision is reasonably strong the District, particularly in Fakenham and Cromer, and to a lesser extent Holt which has wide appeal and high end specialist facilities. However clothing and footwear shopping offer is weaker in the District, as demonstrated by the high level of expenditure leakage for these types of goods.
- 4.94 Residents within all zones in the District (Zones 1 to 3B) are served by at least 2 or 3 main centres that are locally accessible. Residents also have the choice of visiting larger centres for higher order comparison goods shopping, particularly for clothing/fashion shopping. Norwich is reasonably accessible from all parts of the District, and residents to the west have access to Kings Lynn, whilst residents to the east have access to Great Yarmouth. Despite this access to larger centres, North Norfolk retains a sustainable market share of comparison goods expenditure (43% to 55%) in most zones. The exception is Zone 3B (Stalham/Hoveton) which falls within the catchment area of Great Yarmouth and Norwich.
- 4.95 Given the scale, quality and range of shopping facilities available in Norwich, Great Yarmouth and Kings Lynn, the proportion of comparison expenditure spent outside the District is likely to remain high, particularly in the south and west of the district. Investment will be needed in the District in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for North Norfolk should be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections in this section assume that new development will retain the district's share of comparison expenditure in the study area and will help to maintain this share in the future.

Operator Demand

4.96 The “Requirements List” provides an online database of commercial property requirements specifically for North Norfolk. The database includes over 16,750 regularly updated target towns and cities where regional, national and international occupiers want to be. The results for North Norfolk District (December 2016) are:

Convenience Goods	Comparison Goods
Fakenham	Fakenham
Farm Foods - 6,000 to 8,000 sq.ft.	Pets at Home - 3,000 to 15,000 sq.ft.
Cromer	Cromer
Holland & Barrett - 1,000 to 7,000 sq.ft.	Sue Ryder - 800 sq.ft.
Farm Foods - 6,000 to 8,000 sq.ft.	Cotton Traders – 2,000 to 3,000 sq.ft.
Holt	Pets at Home - 3,000 to 15,000 sq.ft.
Holland & Barrett - 1,000 to 7,000 sq.ft.	British Heart Foundation – 800 to 1,500 sq.ft
Sheringham	Holt
Aldi – 18,500 sq.ft.	Superdrug - 2,500 to 5,500 sq.ft.
Farm Foods - 6,000 to 8,000 sq.ft.	North Walsham
	Superdrug - 2,500 to 5,500 sq.ft.
	Savers – 2,000 to 3,500 sq.ft
	Sheringham
	Superdrug - 2,500 to 5,500 sq.ft.
	Savers – 2,000 to 3,500 sq.ft

4.97 This list suggests the five main towns (Cromer, Fakenham, Holt, North Walsham and Sheringham) have the best prospects for attracting multiple retailers. However the list of requirements is relatively short and there are duplicates where a retailer could consider one or other centre but not both.

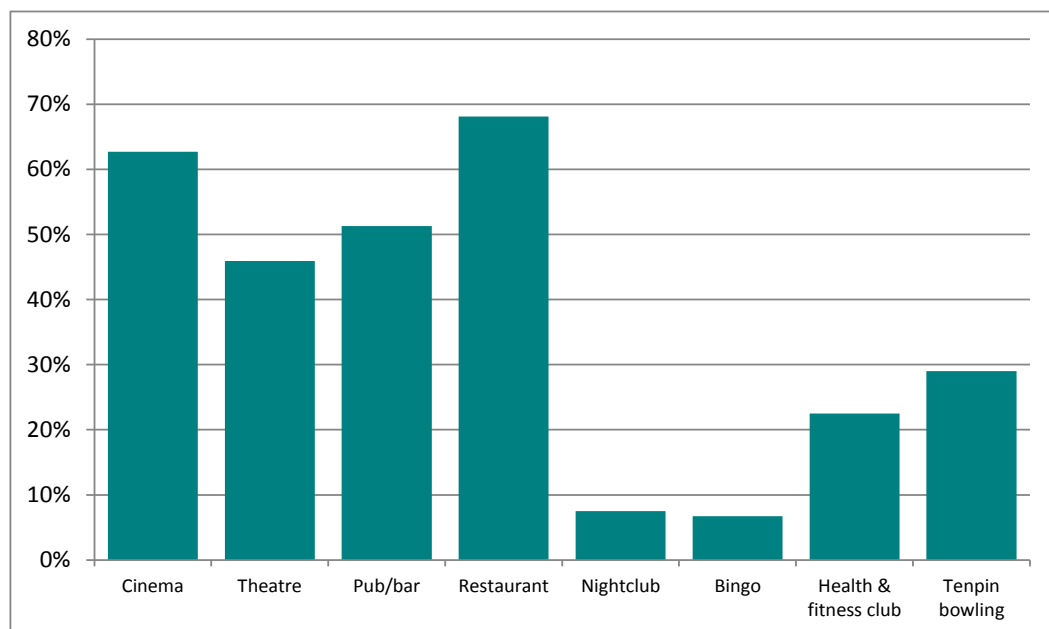
4.98 Overall the current demand from multiple retailers appears to be limited in North Norfolk.

5.0 Future Requirements for Other Town Centre Uses

Introduction

5.1 This section assesses the potential for commercial leisure and town centre uses in North Norfolk District, including theatres, cultural facilities, cinemas, ten pin bowling, bingo, health and fitness, restaurants/cafes, pubs/bars and takeaways/fast food. Household survey respondents were asked about their family’s leisure activities. The participation rates within the study area are shown in Figure 5.1. An assessment of these sectors is set out in this section.

Figure 5.1 Leisure Participation (% of Households)



Source: NEMS Household Survey Oct 2016

5.2 The household survey identifies that visiting restaurants (68%) is the most popular leisure activity within the District, closely followed by visiting cinemas (63%), pubs/bars (51%) and theatres (46%).

Commercial Leisure Uses

5.3 Residents in North Norfolk District have good access to a range of commercial leisure and entertainment facilities within the District and in the surrounding area, in particular Norwich and Great Yarmouth.

5.4 Based on Lichfields’ experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from clustering together for example on out of centre leisure parks.

Cinemas

- 5.5 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions in 2015 were 171.9 million. Cinema trips have plateaued since 2002, despite population growth of 9.6% during this period (59.4 million to 65.1 million). The 2015 national average was 2.64 trips per person.
- 5.6 The Cinema Advertising Association identifies 771 cinema facilities with 4,115 screens. Lichfields' national CINESCOPE model identifies approximately 800,000 cinema seats in the UK. The CINESCOPE model assesses the provision of cinema screens/seat against projected customer cinema trips across the country, in order to identify areas of under and over-provision. The latest (2015) national average is about 42,000 cinema trips per screen per annum, or 215 trips per seat per annum.
- 5.7 Residents in North Norfolk District and the wider study area have good access to a choice of 4 cinema's providing 29 screens and 5,444 seats, as follows:
- 1 the Regal Movieplex in Cromer (4 screens and 370 seats);
 - 2 the Hollywood Cinema in Fakenham (3 screens and 360 seats);
 - 3 Odeon IMAX in Norwich (14 screens, 2,862 seats plus 4 galleries with 117 seats); and
 - 4 Vue Cinema in Norwich (8 screens and 1,852).
- 5.8 These cinemas are complemented by two part-time independent cinemas, the Screen-next-the-Sea in Wells-next-the-Sea and The Little Theatre in Sheringham. The cinemas within North Norfolk are relatively small and do not offer the choice of films shown at large multiplex cinemas in Norwich.
- 5.9 The survey results indicate that over 62.7% of households within the study area visit the cinema (37.3% do not participate in this activity). The main destinations visited by participating households are set out in Table 5.1 below. The Regal Movieplex cinema in Cromer attracts 23.5% of cinema trips from the core zones and Hollywood Cinema in Fakenham attracts 12.2%. There is a significant leakage of cinema trips from the core study area zones to the Odeon IMAX and Vue cinema in Norwich. In total North Norfolk District market share of cinema trips in the study area as a whole is about 38%.

Table 5.1 Main Cinema Trip Destinations

Destinations	% Market Share in each Area (Zones)				
	Fakenham/ Wells (Zone 1)	Holt/ Sheringham/ Cromer (2A/2B)	N. Walsham/ Stalham/ Hoveton (3A/3B)	Peripheral Zones (4/5/6)	Study Area Total
Odeon IMAX Norwich	2.7	11.3	42.7	26.1	24.2
Regal Movieplex Cromer	3.3	67.0	23.4	4.8	23.5
Vue Norwich	13.2	7.0	13.7	17.4	13.5
Hollywood Cinema Fakenham	73.3	9.6	0.0	4.8	12.2
Hollywood Cinema Yarmouth	0	0	1.6	15.0	6.7
Hollywood Cinema Norwich	0	0	3.2	8.7	4.4
Little Theatre Sheringham	0	0.9	0	0	0.2

Source: NEMS Household Survey Oct 2016

- 5.10 The study area population in 2016 (172,205 people) will generate 454,621 cinema trips per annum, based on the national average visitation rate (2.64 trips per annum). The tourist population (an average of 26,800 people per day spread throughout the year) would generate a further 70,752 cinema trips per annum. The total number of cinema trips is 525,373 per annum.
- 5.11 As indicated above, North Norfolk retains 38% of the cinema trips generated within the study area i.e. about 199,600 trips. Based on the national average of 215 trips per seat, 199,600 trips would support 928 cinema seats, compared with the existing provision of 730 seats. This suggests a current shortfall of 198 seats.
- 5.12 By 2036 about 218,600 cinema trips (38% of the total in the study area plus tourists) could be retained within North Norfolk District. Based on the national average these cinema trips could support 1,016 seats, compared with the existing provision of 730 seats. The surplus potential at 2036 is 286 seats.
- 5.13 These projections suggest that there is a theoretical capacity for a small (2-3 screens) additional cinema in North Norfolk District over the plan period, but this would rely heavily on demand from tourists. The most obvious area of deficiency is the North Walsham area, but access to large cinemas in Norwich may restrict operator demand in this area.

Theatres

- 5.14 In total 46% of respondents to the household survey indicated that they visit the theatre. When asked where they had last visited the theatre, the following main destinations were mentioned are shown in Table 5.2.
- 5.15 The two venues in North Norfolk District attract only 8.4% of theatre trips within the study area.
- 5.16 Data from the British Theatre Consortium, British Theatre Repertoire (2014) indicated British theatres presented 59,386 performances attracting over 33 million theatre visits, around 121,000 visits per venue (274 venues with SOLT/UK Theatre’s membership).
- 5.17 Assuming an average of 0.5 trips to the theatre per person per annum, as implied by the British Theatre Consortium data, the North Norfolk study area population plus tourist in 2016 (199,000 people) will generate 99,500 theatre trips per annum. The household survey results suggest most of these trips will be attracted to Norwich, with less than 10,000 trips attracted to North Norfolk.

Table 5.2 Main Theatre Trip Destinations

Destination of Last Trip	% of Participating Households
Theatre Royal, Norwich	72.2
The Little Theatre, Sheringham	6.8
Central London/ West End	4.7
Norwich Playhouse, Norwich	2.6
Cromer Pier & Pavilion Theatre, Cromer	1.6
Maddermarket Theatre, Norwich	1.4

Source: NEMS Household Survey Oct 2016

- 5.18 There is no clear need for additional theatre provision in North Norfolk, however if proposals were brought forward they should be considered favourably because this would enhance the overall offer of North Norfolk and improve the retention of theatre trips in the District.

Private Health and Fitness Clubs

- 5.19 The household survey indicates that 22.5% of respondents or their families visit health/fitness clubs. Of the participating households, the main destinations mentioned are summarised in Table 5.3. North Norfolk District attracts 33.2% of health and fitness facilities trips within the study area. The household survey results suggest respondents tend to use local facilities or facilities close to their place of work.

Table 5.3 Main Health and Fitness Club Destinations

Destination of Last Trip	% of Participating Households
Norwich city centre (unspecified)	16.6
North Walsham town centre (unspecified)	10.9
Woodlands Leisure, Upper Sheringham	5.6
Victory Swim & Fitness Centre, North Walsham	4.2
Barretts Health & Fitness, Dereham	4.1
Fakenham Sports & Fitness Centre, Fakenham	3.3
Trimington Village Centre	2.8
High Altitude, Norwich	2.7
Fakenham town centre (unspecified)	2.6
Filby Village Centre	2.6
Fitness 2000, Great Yarmouth	2.5
Great Yarmouth Town Centre (unspecified)	2.3
Spirit Health Club, Holiday Inn, Norwich	2.0
Rosis Leisure, North Walsham	1.9
Splash Leisure & Fitness Centre, Sheringham	1.5
Pinewood Park Leisure Centre, Upper Sheringham	1.3
Holt town centre (unspecified)	0.9
Hoveton/Wroxham (unspecified)	0.5
Wells-next-the-Sea town centre (unspecified)	0.5

Source: NEMS Household Survey Oct 2016. Note: Only destinations that attract more than 2% of respondents outside the District included.

- 5.20 The Sport England/Active Places data indicates that there are 13 registered health and fitness suites in the District, of which two are for private use only (Paston College & Woodland Holiday Park). These private use facilities are relatively small, with 38 fitness stations in total. The remaining 11 registered facilities, open to the general public (including registered members) have 317 fitness stations in total as shown in Table 5.4. The existing health and fitness provision is: Cromer (15 stations); Fakenham (75); Holt (43); North Walsham (104) and Sheringham (78) and other (40).
- 5.21 The study area population in 2016 (172,205 people) is projected to grow to by 182,076 by 2026, and 191,081 by 2036. Health and fitness facilities in North Norfolk District attracts 33.2% of respondents, which suggests a catchment population of 57,172 in 2016, 60,449 in 2026 and 63,439 in 2036. This catchment population suggests North Norfolk District has about 6.2 fitness stations per 1,000 people (355 stations in total).

Table 5.4 North Norfolk District Health and Fitness Clubs (Sport England/Active Places Data, 2016)

Name/Location	Type	No. Fitness Stations
Alderman Peel Sports College, Wells-n-t-sea	Pay and Play	18
Cromer Country Club	Registered Membership Use	8
Cromwell Barn Health Fitness Centre, Fakenham	Pay and Play	35
Fakenham Sports & Fitness Centre	Pay and Play	40
Fitness Express at Kelling Heath, Holt	Pay and Play	33
Holt Youth Project	Pay and Play	10
Links Country Park Hotel/Golf Club, Cromer	Pay and Play	7
Paston College, North Walsham	Private Use	16
Pinewood Leisure Club, Sheringham	Pay and Play	45
Rossi's Leisure, N. Walsham	Pay and Play	31
Splash Leisure and Fitness Centre, Sheringham	Pay and Play	33
Victory Swim & Fitness Centre, N. Walsham	Pay and Play	57
Woodland Holiday Park	Private Use	22
Total		355

Source: Sport England

- 5.23 The East of England region has 754 Sport England registered health and fitness suites with 35,950 fitness stations (average of 48 stations per suite). This existing provision equates to around 5.6 fitness stations per 1,000 people. North Norfolk has a higher provision of fitness stations (6.2 per 1,000 people) than the regional average (5.2 stations), which suggest health and fitness clubs should be trading above average.
- 5.24 The study area population is projected to increase by 9,871 by 2026 and 18,876 by 2036. If North Norfolk can attract 40% of this population growth (3,948 at 2026 and 7,550 at 2036) then this would generate demand for 24 fitness stations by 2026 and 47 fitness stations by 2036, based on 6.2 stations per 1,000 people.
- 5.25 These figures suggest there is scope for two small health and fitness facilities (up to 25 stations each) health and fitness gym in the District over the plan period. The most obvious areas of deficiency are Cromer and Holt.

Tenpin Bowling

- 5.26 The household survey results suggest that 29% of households in the study area visit tenpin bowling facilities. The main destinations are set out in Table 5.5.

Table 5.5 Main Tenpin Bowling Destinations

Destination of Last Trip	% of Participating Households
Hollywood Bowl, Wherry Road, Norwich	32.8
Strikers, Rossi's Leisure Centre, North Walsham	25.0
Fakenham Superbowl, Bridge Street, Fakenham	9.8
Regent Super Bowl, Great Yarmouth	7.9
Namco Funscape, Bowthorpe, Norwich	6.3

Source: NEMS Household Survey Oct 2016

- 5.27 The two venues in North Norfolk District attract around 35% of tenpin bowling trips within the study area. Strikers at Rossi's Leisure Centre in North Walsham is the most popular destination in North Norfolk and has 6 bowling lanes, and this is complemented by Fakenham Superbowl which also has 6 bowling lanes.
- 5.28 The study area population plus tourists in 2016 (199,305 people) can in theory support about 17 tenpin bowling lanes, based on the national average of one lane per 12,000 people. By 2036 the study area population (217,881 including tourists) could support 18 lanes.
- 5.29 North Norfolk currently has 12 bowling lanes. There may be scope for an additional small (4-6 lanes) tenpin bowling in the Cromer/Sheringham area, supported by a combination of local residents and tourist visitors.

Bingo, Games of Change and Gambling

- 5.30 There are no major bingo facilities within North Norfolk District. The household survey results suggest that 6.7% of households in the study area visit bingo facilities, which is comparable with the national average participation rate. The main destinations are set out in Table 4.6.
- 5.31 Gala and Mecca are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas) into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups. The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators require a catchment population of 50,000 - 70,000 (source: Business in Sport and Leisure BISL).

Table 5.6 Main Bingo Destinations

Destination of Last Trip	% of Participating Households
Mecca Bingo, Aylsham Road, Norwich	35.7
Mecca Bingo, All Saints Green, Norwich (now closed)	25.7
Cromer Town Centre	10.4

Source: NEMS Household Survey Oct 2016

- 5.32 The adult (over 18) population in the North Norfolk study area (around 145,000 people²) would generate about 253,750 admissions, based on the national participation rate (1.75 trips per adult). If North Norfolk District could retain around 40% of all bingo trips (101,500 trips), then there would be theoretical capacity for a bingo facility in the District, based on national average figures (113,000 admissions per club). However the dispersed population in the District may make this theoretical potential unviable for operators. Norwich is the most likely location for new facilities.

Other Services, Restaurants, Bars and Takeaways

- 5.33 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

² Based on the proportion of the adult population (18+) being 84%. Source: ONS Population estimates- local authority based by five year aged band (2015)

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those categorised as Class A3), funeral parlours and post offices
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** including restaurants, cafes (A3) and takeaways (A5)
- **Class A4** pubs/bars (Class A4)

5-34 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres, the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded and themed pub/restaurant chains have invested heavily and not exclusively in larger centres.

5-35 The key categories for food and beverage offers are:

- **Impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;
- **Speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
- **Refuel and relax:** a drink and snacks and short break in a pleasant environment rather than focusing on eating a main meal; and,
- **Casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

5-36 Food and beverage establishments (Class A3, A4 and A5) including restaurants/cafés and bars/pubs have supported other major leisure uses and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. The current mix of uses within the town centre boundaries of each of the main centres in the District is summarised in Table 5.7.

Table 5.7 Mix of Class A / Food and Beverage Uses in the Main Centres in North Norfolk

Town	Use Class % of Total Class A Units					
	A1	A2	A3	A4	A5	Vacant
Cromer	60.7	11.6	13.8	3.3	2.8	7.7
Fakenham	57.0	16.2	8.5	2.3	6.9	9.2
North Walsham	52.7	14.5	6.4	3.6	5.4	17.3
Sheringham	66.7	6.2	15.5	3.7	4.3	3.7
Holt	74.4	11.6	7.3	0.6	1.8	4.3
Stalham	67.1	5.5	4.1	4.1	9.6	9.6
Wells-next-the-Sea	68.4	7.3	18.3	1.2	1.2	3.7
Hoveton/Wroxham	60.3	12.1	15.5	1.7	6.9	3.4
UK Average	56.5	12.3	9.0	4.5	5.9	11.8

Source: Lichfields' Survey Sept 2016

5.37 Centres within North Norfolk have retained a reasonable level of Class A1 retail use when compared with the national average, and the vacancy rate remains relatively low within most centres. There is a relatively high proportion of Class A3 (restaurants/café) in most of the main tourist destinations i.e. Cromer, Sheringham, Wells-next-the-Sea and Hoveton/Wroxham. Given the competing pressures for retail and non-retail uses and the relatively low vacancy rates, a balance between Class A1 and Class A3 to A5 uses needs to be maintained to ensure centres continue to fulfil their current roles.

Food and Beverage Expenditure

5.38 Experian's food and beverage expenditure per capita projections are shown in Table 2 in Appendix 4. The total food and beverage expenditure in the study area is £194.99 million in 2016, see Table 3 in Appendix 4. The tourist population (an average of 26,800 people per day spread throughout the year) would generate a further £146.74 million per annum based on an average spend on catering of £15 per day, as indicated by the Economic Impact of Tourism North Norfolk report.

5.39 Food and beverage expenditure per capita is expected to increase in real terms (excluding inflation) by 30% between 2016 and 2036. Taking into account population growth, total food and drink expenditure within the study area plus tourists is expected to increase from £341.72 million in 2016 to £473.32 million in 2036, an increase of over 38% (Table 3, Appendix 4).

Food and Beverage Expenditure Patterns

5.40 A summary of food and beverage expenditure patterns is shown in Tables 5.8 and 5.9. The results indicate that the retention of food and beverage trips within North Norfolk is similar to comparison good shopping. Households have good access to a number of different destinations and there is a propensity to visit different destination. The catchment areas of centre overlap to a significant extent, and no single centre is dominant. The ability to increase North Norfolk's food and beverage market share will be constrained by these overlapping catchment areas.

Table 5.8 Food Destinations (restaurant/café destination named by respondents)

Destinations	% Market Share in each Area		
	North Norfolk	Outer Zones	Total
Sheringham	7.7	2.7	5.5
Fakenham	8.3	0.9	5.4
Cromer	8.3	0.5	5.2
Holt	7.1	-	4.3
North Walsham	4.3	3.6	4.0
Wells-next-the-Sea	2.2	1.4	2.0
Hoveton/Wroxham	0.9	2.3	1.5
Stalham	1.2	-	0.8
Norwich	33.2	35.5	33.9
Great Yarmouth	1.5	15.9	7.3
Aylsham	1.5	5.5	3.1
Kings Lynn	0.3	3.2	1.4

Source: NEMS Household Survey Oct 2016

Table 5.9 Beverage Destinations (pub/bar destination named by respondents)

Destinations	% Market Share in each Area		
	North Norfolk	Outer Zones	Total
Sheringham	5.7	-	3.6
Fakenham	10.2	0.6	6.3
Cromer	9.0	0.6	5.6
Holt	5.7	1.2	3.8
North Walsham	7.8	1.2	5.2
Wells-next-the-Sea	2.5	-	1.4
Hoveton/Wroxham	1.6	3.0	2.1
Stalham	2.9	-	1.8
Norwich	22.5	29.0	25.3
Great Yarmouth	0.8	12.1	5.5
Aylsham	0.4	8.5	3.6
Kings Lynn	-	1.8	0.7

Source: NEMS Household Survey Oct 2016

5.41 The five main town centres (Cromer, Fakenham, Holt, North Walsham and Sheringham) are the main food and beverage destination in the District. However, residents also visit a wide variety of villages.

5.42 Existing food and beverage expenditure patterns have been modelled based on the household survey results within the study area zones. Base year (2016) penetration rates are shown in Table 4 in Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within North Norfolk is £223.78 million in 2016, of which over 65% is attributed to tourist visitors.

Future Capacity for Food and Beverage Floorspace

5.43 The household survey suggests that the District's retention of food and beverage expenditure is lower than for convenience goods but higher than the retention of comparison goods expenditure. The levels of expenditure retention are relatively high (around 70%) within Zone 1, 2A and 2B, but lower in the North Walsham (30% in Zone 3A) and Stalham (41% in Zone 3B), where there are higher levels of leakage to Norwich.

5.44 Future improvements to food and beverage provision within the east part of the District could help to claw back some additional expenditure leakage. Some development will be necessary in North Norfolk in order to maintain existing market share in the future. Town centre strategies could focus on maintaining market share for the District.

5.45 Available food and beverage expenditure has been projected forward to 2021, 2026, 2031 and 2036 in Tables 6 to 9 in Appendix 4, and summarised in Table 10. Available food and beverage expenditure to facilities within the District is expected to increase from £223.78 million in 2016 to £303.14 million in 2036.

5.46 For the purposes of this assessment, the existing food and beverage floorspace is estimated to be trading at equilibrium in 2016 (i.e. satisfactory levels). Table 13 assumes that the turnover of food and beverage facilities will increase in real terms in the future. A growth rate of 1% per annum is adopted, and this growth is required to maintain the health and viability of town centres.

5.47 By 2021 within North Norfolk District a whole there will be a small food and beverage expenditure surplus of £1.35 million. By 2026, future expenditure growth generates an expenditure surplus of £9.33 million, which will grow to £19.20 million by 2031 and £30.09 million by 2036.

5.48 These expenditure projections have been converted into floorspace projections in Table 12 in Appendix 4, adopting an average sales density of £5,000 per sq.m gross in 2016, which is again projected to grow by 1% in the future due to improved turnover efficiency. The surplus expenditure at 2026 could support 1,175 sq.m gross floorspace. In the longer term, surplus expenditure at 2031 could support 3,475 sq.m gross in the District, increasing to 5,183 sq.m gross by 2036. The distribution of floorspace is shown in Table 5.10.

Table 5.10 Summary of Food and Beverage Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross			
	By 2021	By 2026	By 2031	By 2036
Cromer	37	253	498	744
Fakenham	43	228	433	638
Holt	39	196	371	545
North Walsham	36	161	299	437
Sheringham	30	268	540	815
Hoveton/Wroxham	7	88	182	277
Stalham	5	53	107	162
Wells-next-the-Sea	10	96	195	294
Other North Norfolk	63	433	851	1,271

Source: Table 11 in Appendix 4.

Qualitative Need

5.50 Fakenham town centre's Venuescore food/service index is 83 compared with the national average of 100. Cromer and Stalham have an index of 43 and North Walsham, Sheringham and Holt. However these low scores reflect the predominance of independent rather than multiple/chain food and beverage outlets.

5.51 The proportional mix of Class A within the eight town centres shown in Figure 4.3 indicates:

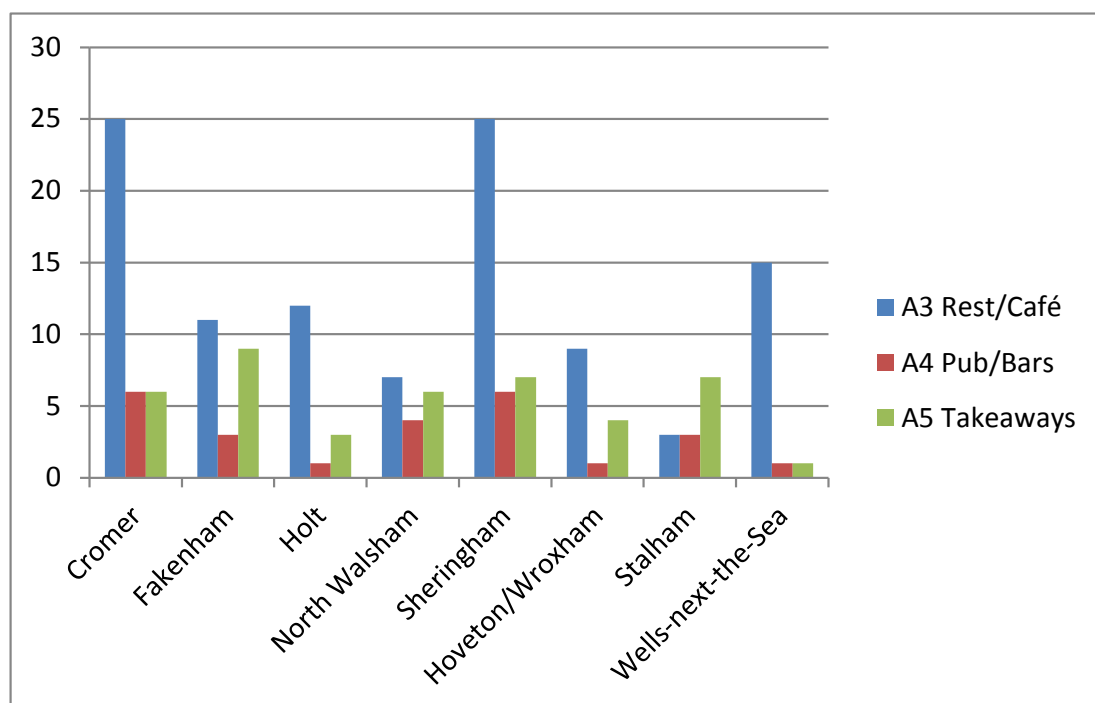
- 1 Fakenham has a comparable provision of Class A3/A5 uses compared with the national average, but a lower provision of Class A4 pubs/bars. The proportion of A5 takeaways is slightly higher than the national average as shown in the centre audit in Appendix 5.
- 2 Cromer has a slightly higher provision of Class A3/A5 uses compared with the national average, but a slightly lower provision of Class A4 pubs/bars. The proportion of A5 takeaways is below the national average.
- 3 North Walsham has a slightly lower provision of Class A3/A4/A5 uses compared with the national average. The proportion of A5 takeaways is comparable with the national average.
- 4 Sheringham has a higher provision of Class A3/A5 uses compared with the national average, reflecting its tourist role, in particular the provision of restaurant and café uses is strong. The provision of Class A4 pubs/bars is similar to the national average.
- 5 Holt has a good provision of Class A3 restaurants, but the provision of A4 pubs/bars and A5 takeaways is below the national average.
- 6 Stalham has a comparable provision of Class A4/A5 uses compared with the national average, but a below average provision of Class A3 restaurants/café's.

- 7 Wells-next-the-Sea has high provision of Class A3 restaurants/cafés reflecting its tourist role, but a below average provision of Class A4 and compared with the national average.
- 8 Hoveton/Wroxham has high provision of Class A3 restaurants/cafés reflecting its tourist role, but a below average provision of Class A4 pubs/bars compared with the national average.

5.52 There are 175 food and beverage outlets within the 8 main town centres. The town audits in Appendix 5 provide a more accurate analysis of food and beverage provision within the 8 main town centres. The number of food and beverage outlets within each town centre is shown in Figure 5.2.

5.53 Cromer and Sheringham the highest provision of restaurant/cafés, followed by Wells-next-the-Sea, reflecting their roles as seaside tourist destinations. Fakenham, Holt and Hoveton/Wroxham also have a reasonable provision of restaurant/cafés for centres of their size.

Figure 5.2 Class A3 to A5 Food and Beverage Outlets in each Town Centre



Source: Lichfields' Land Use Survey September 2016

Conclusions

5.54 A summary of the key findings in this Section is set out below.

- There is theoretical capacity for an additional small (2-3 screens) cinema in North Norfolk District over the plan period. The most obvious area of deficiency is North Walsham. Access to large cinemas in Norwich may restrict operator demand. There is no need to allocate a site for a new cinema in the development plan.
- There is capacity for at two small (25 fitness stations each) health and fitness clubs over the plan period. The most obvious areas of deficiency are Cromer and Holt.
- There may be scope for an additional small (4-6 lanes) tenpin bowling in the Cromer/Sheringham area, supported by a combination of local residents and tourist visitors.

- North Norfolk's dispersed population and proximity to Norwich will restrict the scope for a commercial bingo facility or a theatre.
- Projections indicate capacity to support around 1,175 sq.m gross floorspace for food and beverage outlets by 2026, increasing to 5,183 sq.m gross by 2036

6.0 **Analysis of North Norfolk's Main Centres**

Introduction

6.1 This section draws together the analysis set out in previous sections and highlights the implications for each town centre in North Norfolk. It explores how the identified growth across the District could be accommodated, the potential distribution of future development and the future policy approach in each town.

National Guidance

6.2 The National Planning Policy Guidance (NPPF) indicates that development plans should include town centre strategies that plan for a 3-5 year period, whilst keeping these strategies under review and giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres.

6.3 The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites.

6.4 Consistent with the sequential approach town centres are expected to be the main focus for retail and leisure development. The NPPF does not require development to be of an appropriate scale and nature in relation to the centre in which it is located, but larger town centres have the best prospects for attracting investment from developers and multiple operators.

6.5 The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold then the default threshold is 2,500 sq.m gross. The CLG Practice Guidance indicates that it may be necessary to consider the impact of proposals below this floorspace threshold, e.g. large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre. The Planning Practice Guidance provides more guidance on setting a locally appropriate thresholds, and indicates it will be important to consider:

- the scale of proposals relative to town centres;
- the existing viability and vitality of town centres;
- cumulative effects of recent developments;
- whether local town centres are vulnerable;
- likely effects of development on any town centre strategy; and
- impact on any other planned investment.

6.6 This section considers the appropriate impact threshold for each main town centre in North Norfolk.

6.7 The designation of a primary shopping areas or centre boundaries is important when applying the sequential approach, in order to direct retail and town centre uses to sustainable locations and determining whether a retail impact assessment is required. The NPPF indicates that the first preference for retail uses should be the primary shopping area (PSA), which will comprise

the primary frontages and the secondary frontages that are contiguous with the primary frontages. The first preference for leisure uses is normally the wider defined town centre, which usually includes the PSA and other parts of the town centre.

- 6.8 The NPPF also indicates that policies that control the mix of uses can be adopted in order to maintain the vitality and viability of town centres. Planning authorities can define primary and secondary frontages, where primary frontages should contain a high proportion of Class A1 retail use and secondary frontages will have greater diversity. This section examines town centre boundaries and shop frontage policy approaches in each town centre.

Accommodating Growth

- 6.9 The quantitative and qualitative assessment of the potential for new retail and leisure floorspace within the previous sections suggests there is scope for new development within North Norfolk. In addition to new floorspace, there will be a need for qualitative improvements/investment within the town centres. Improvements to the street scape/environment will be required to ensure the shopping environment is attractive to customers and investors.
- 6.10 The floorspace projections assume that new shopping and leisure facilities within North Norfolk District can maintain their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:
- 1 major retail developments in competing centres;
 - 2 the re-occupation of vacant retail floorspace;
 - 3 the availability of land to accommodate new development;
 - 4 the reliability of long term expenditure projections;
 - 5 the effect of internet/home shopping on the demand for retail property;
 - 6 the level of operator demand for floorspace in North Norfolk;
 - 7 the likelihood that North Norfolk's existing market share of expenditure will change in the future in the face of increasing competition;
 - 8 the potential impact new development may have on existing centres.
- 6.11 As indicated above, the PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2026 are realistic and are based on up-to-date (post EU referendum) forecasts. The longer term floorspace projections (up to 2036) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections up to 2031 and 2036 should be monitored and kept under review.
- 6.12 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth and ageing population on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the

demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. The ageing population may counter-balance the growth in home shopping.

- 6.13 The global projections for the District up to 2026 suggest there is scope for around 7,600 sq.m gross of Class A1 to A5 floorspace. The long term projections up to 2036 suggest there is scope for about 20,700 sq.m gross of Class A1 to A5 floorspace.
- 6.14 The existing stock of premises should have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed and 1% per annum is adopted for food/beverage uses. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.
- 6.15 Lichfields' land use survey indicates there were 70 vacant shop units within the 8 main town centres, which equates to an overall vacancy rate of 7.3%, which is below the Goad national average (11.8%). The short term priority should be the reoccupation of vacant floorspace within centres where the vacancy rate is relatively high. Vacant premises should accommodate growth, given their town centre location and the sequential preference for future investment. If the current vacancy level is reduced to 5%, as achieved by several centres in the District, then the number of reoccupied units could accommodate about 2,600 sq.m gross of Class A1 to A5 retail space (assuming an average of 100 sq.m per unit). Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:
- Cromer town centre 500 sq.m gross;
 - Fakenham town centre 500 sq.m gross;
 - North Walsham town centre 1,300 sq.m gross; and
 - Stalham town centre 300 sq.m gross.
- 6.16 If this reduction in vacant units can be achieved then the overall retail floorspace projection for the District up to 2026 would reduce from 7,600 sq.m gross to 5,000 sq.m gross. In the very long term up to 2036, this reduction in vacant units would reduce the projection marginally from 20,700 sq.m gross to 18,100 sq.m gross.
- 6.17 The application of shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist their reoccupation.

Cromer

- 6.18 Cromer has the second largest retail provision in terms of sales floorspace in the District. Cromer town centre has a reasonably high proportion of comparison goods shops, including a small selection of national multiples. Cromer town centre offers a choice of shops and services that serve resident, tourists and the rural catchment area. The town centre has a particularly strong provision of restaurant/cafés. The shop vacancy rate is lower than the national average, but there is still scope to reduce this vacancy rate.
- 6.19 Cromer retains a relatively high proportion of convenience (52%), comparison (38%) and food/beverage (24%) expenditure within its local area (Zone 2B). Cromer should continue to be designated at the top of the retail hierarchy in North Norfolk to maintain this important role. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.1.

Table 6.1 Cromer Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	0	0	0
Comparison	1,182	2,299	3,464
Food/Beverage	253	498	744
Total	1,435	2,797	4,208

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.20 In terms of scale of development, retail proposals of 2,500 sq.m gross within Cromer would be significant in relation to the scale of existing retail provision in the town centre, and it would represent 59% of the total floorspace projection for Cromer over the plan period. The town centre will be vulnerable to impacts of development under 2,500 sq.m gross. A locally set threshold of 1,000 sq.m gross would be appropriate for retail and leisure development in Cromer, based on the projections in Table 6.1 and the current scale and health of the town centre.
- 6.21 As indicated above, vacant shop units within Cromer town centre might reasonably accommodate around 500 sq.m gross, which is around a third of the floorspace projection up to 2026. There is an identified need for additional comparison goods shopping and to a lesser extent food/beverage floorspace, which should be provided either within or close to the town centre. Taking into account vacant shop units, further sites to accommodate around 900 sq.m gross by 2026 will need to be identified, increasing to around 2,300 sq.m gross by 2031, and 3,700 sq.m gross by 2036.
- 6.22 The North Norfolk Site Allocations DPD 2011 allocates two sites for retail development in Cromer, as follows:
- Land Between Louden Road and Church Street (ROS3 – 0.28ha);
 - Land South of Louden Road (ROS4 – 0.3ha).
- 6.23 Land between Louden Road and Church Street is within the PSA and is identified for mixed use retail and commercial development and approximately 15 dwellings. It comprises car parking, service yards and five retail units (around 1,600 sq.m over two floors), but the rear of the site contains underused land. If the site can be assembled for mixed use development then the amount of retail floorspace could be increased by about 50% (800 sq.m), increasing the plot density from around 30% to 50%. A arcade/parade could link Louden Road and Church Street, providing a new pedestrian linkage. Allowing for site assembly this site could meet emerging need after 2026.
- 6.24 Land South of Louden Road is within the designated Town Centre but outside the PSA. It comprises a carpet warehouse, dance school, BT exchange and depot and service yards / car parks. The ROS4 allocation seeks to optimise the use of this site by encouraging new retail development. If the site can be assembled for development then the retail floorspace of around 1,000 – 1,500 sq.m gross could be accommodated on the site, assuming a plot density of around 30%-50%.
- 6.25 If delivered these sites and vacant shop units could accommodate up to 2,800 sq.m gross, which is around two thirds of the long term projection up to 2036. Cromer town centre is designated as a Conservation Area with many Listed Buildings. Large scale development sites are limited. Development elsewhere in the town centre is likely to be small scale infill/extensions. If additional sites need to be identified to accommodate long term demand then the surface car parks to the south and west of the town centre at The Croft and Cadogan Road are the most obvious edge-of-centre locations where large scale development could be accommodated, but replacement car parking would need to be provided. Alternatively intensification within the out-

of-centre retail parks could be considered in the long term (after 2026), if the sequential and impact tests are met.

- 6.26 The designated Cromer town centre boundary contains over 180 Class A retail/service units. Lichfields' land use survey indicates the designated town centre boundary and primary shopping area are appropriate. There have been limited changes since the Core Strategy was adopted in 2008.
- 6.27 About two thirds of the shop units are located within the designated primary shopping area (PSA). Less than a quarter of the units are located within primary retail frontages. The proportion of non-A1 measured frontage uses within the primary retail frontages is around 25%, and is still below the 30% maximum. However the 30% maximum has been exceeded in two small primary frontages at the east end of Church Street (Numbers 27 to 35 and 37 to 45).
- 6.28 The primary retail frontages make up a relatively small part of the town centre, and they represent the prime shopping pitch on Church Street and the High Street where most of the larger shop units are located. The extensive unprotected frontages in the rest of the PSA and the large number of shop units within the wider designated town centre provides significant flexibility for changes of use and the introduction of non-A1 uses, if market forces require this space to respond to customer's needs. Recent changes to the GPDO which allow changes of use from Class A1 for a temporary period provide further flexibility.
- 6.29 In our view the primary retail frontages should continue be protected to maintain a predominance of Class A1 uses in order to maintain the vitality and viability of the centre. Cromer has maintained an appropriate mix of retail and non-retail uses and the vacancy rate remains low. Limited changes since the Core Strategy was adopted in 2008 suggest the current coverage of the primary retail frontages within Cromer is appropriate and the 30% maximum for non-A1 uses should be maintained. The floorspace projections suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA.

Fakenham

- 6.30 Fakenham has an attractive historic town centre and a pleasant shopping environment that helps to attract local customers and visitors. Fakenham has the largest provision of retail sales floorspace in the District. The mix of retail and non-retail services within Fakenham town centre is very similar to the national average. There is a good provision of convenience shops and Class A2 services. The town centre has a good selection of comparison goods shops reflecting its size and role in the hierarchy, including a number of national multiples.
- 6.31 Fakenham retains a relatively high proportion of convenience (76%), comparison (40%) and food/beverage (36%) expenditure within its local study area zone (Zone 1). In order to maintain and potentially improve the retention of comparison and food/beverage expenditure opportunities to accommodate development/investment should be identified to ensure Fakenham maintains its market share. Fakenham should continue to be designated at the top of the retail hierarchy in North Norfolk to protect this important role. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.2.

Table 6.2 Fakenham Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	0	0	0
Comparison	1,042	2,026	3,053
Food/Beverage	228	433	638
Total	1,270	2,459	3,691

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.32 As in Cromer, retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Fakenham town centre, and would represent 68% of the total floorspace projection for Fakenham over the plan period. The town centre will be vulnerable to impacts of development under 2,500 sq.m gross. A locally set threshold of 1,000 sq.m gross would be appropriate for retail and leisure development in Fakenham.
- 6.33 As indicated above, vacant shop units within Fakenham town centre might reasonably accommodate around 500 sq.m gross, which is around 40% of the floorspace projection up to 2026. There is an identified need for additional comparison goods shopping and to a lesser extent food/beverage floorspace, which should be provided either within or close to the town centre. Taking into account vacant shop units, further sites to accommodate around 800 sq.m gross by 2026 will need to be identified, increasing to around 2,000 sq.m gross by 2031, and 3,200 sq.m gross by 2036.
- 6.34 The North Norfolk Site Allocations DPD 2011 allocates two sites for retail or mixed use development in Fakenham, as follows:
- Land North of Rudham Stile Lane (FO1 – 85 ha);
 - Land at Fakenham Town Centre (ROS6 – 3.9ha).
- 6.35 The Core Strategy indicates up to 900 dwellings will be provided in an urban expansion to the north of the town on land north of Rudham Stile Lane. Policy FO1 indicates that the development will include community facilities and retail uses may be permitted where they serve the needs of the proposed development. This scale of residential development should be supported by local shopping provision to ensure residents have access to day to day facilities within walking distance.
- 6.36 The total population of the completed urban expansion is likely to be around 2,000 people. This population would generate (at 2036) retail expenditure of £4.4 million for convenience goods, £10.6 million for comparison goods and £2 million for food and beverage, based on average expenditure estimates per capita shown in Table 2 in Appendix 2, 3 and 4. Not all of this expenditure would be spent within local shopping facilities within the development.
- 6.37 Local shopping facilities are likely to meet top-up grocery shopping needs. Comparison shopping facilities in local centres tend to cater for lower order goods bought on a regular basis e.g. pharmaceutical, beauty product and small household goods. Local centres may also include food takeaways, cafés and public houses. In order to provide sustainable local shopping facilities with an appropriate critical mass, it is reasonable to assume 40% of convenience and food and beverage expenditure can be attracted to new local shopping facilities within the urban expansion area, allowing for a net in and out flow of expenditure. For comparison good lower figure of 20% would be realistic for lower order goods.
- 6.38 If these market shares are adopted then £4.7 million of expenditure could be attracted to new local shopping facilities within the urban expansion area, broken down £1.8 million for convenience goods, £2.1 million for comparison goods and £0.8 million for food and beverage uses. This expenditure could support around 700 sq.m gross, including a small convenience store (up to the Sunday trading threshold) of around 250 sq.m gross, around 300 sq.m gross of comparison goods retail and around 150 sq.m gross of food and beverage floorspace.
- 6.39 If delivered these opportunities sites and vacant town centre shop units could accommodate up to 1,200 sq.m gross, which meets around a third of the projection up to 2036. Development to accommodate a further 2,500 sq.m gross should be focused within the town centre. The ROS6 allocation in Fakenham town centre includes retail units in Millers Walk, car parking areas, an auction building, bowling alley and commercial leisure uses, a small number of dwellings and

some vacant land. The area is identified as an opportunity for comprehensive redevelopment for a mixture of retail, commercial, business and upper floor residential uses.

- 6.40 The surface car parks either side of Whitehorse Street are likely to be the first phase of development and could accommodate up to 2,000 sq.m gross of retail floorspace at ground floor level. This area would form a natural extension to the town centre shopping area, but replacement car parking may need to be provided, perhaps in the southern part of the identified opportunity area. In the longer term development adjacent to land adjacent to the Aldiss store and the area occupied by the auction buildings are more than sufficient to accommodate the retail floorspace projection for Fakenham up to 2036. Expansion of the town centre in this area will be beneficial to the centre overall, but the scale and design of development will need to be sympathetic to the historic character of Fakenham.
- 6.41 The designated Fakenham town centre boundary contains 130 Class A retail/service units. Lichfields' land use survey indicates the designated town centre boundary and primary shopping area remain appropriate.
- 6.42 About 75% of the shop units are located within the designated primary shopping area (PSA). About 40% of the PSA units are located within the primary retail frontages. The proportion of non-A1 retail measured shop frontage within the primary retail frontages is around 34%, slightly above the 30% maximum. Three of the seven primary frontages exceed the 30% threshold i.e. numbers 4-14 Market Place, 37 to 39 Market Place and 4 to 10 Bridge Street. The proportion of non-A1 frontage is significantly below the threshold in other frontages.
- 6.43 The primary retail frontages in Fakenham represent a relatively small part of the town centre. These primary frontages represent the prime shopping pitch around the Market Place and within Millers Walk. The extensive unprotected frontages in the rest of the PSA and the large number of shop units within the wider designated town centre provides significant flexibility for changes of use and the introduction of non-A1 uses.
- 6.44 In our view the primary retail frontages should continue be protected to maintain a predominance of Class A1 uses in order to maintain the vitality and viability of the centre. Fakenham has maintained an appropriate mix of retail and non-retail uses and the vacancy rate remains lower than the national average, and is particularly low within the primary retail frontages. Limited changes since the Core Strategy was adopted in 2008 suggest the current coverage of the primary retail frontages within Fakenham is appropriate and the 30% maximum for non-A1 uses should be maintained. The floorspace projections suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA.

North Walsham

- 6.45 North Walsham has the third largest retail provision in terms of sales floorspace in the District. The town centre has the highest shop vacancy rate in the District, significantly above the national average, although the proportions of comparison goods shops and non-retail services are around the national averages. The range and choice of comparison good shops is varied. The proportion of charity shops is particularly high.
- 6.46 North Walsham retains a relatively high proportion (79%) of convenience goods expenditure within its local study area zone (Zone 3A), but a lower retention of comparison goods (28%) and food/beverage (14%) expenditure. The health and vitality of North Walsham is more vulnerable than other larger town centres in North Norfolk and the centre would benefit from qualitative improvements, investment and improvements to the retail offer. In order to encourage these improvements North Walsham town centre should continue to be designated at the top of the

retail hierarchy in North Norfolk. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.3.

Table 6.3 North Walsham Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	1,124	1,345	1,553
Comparison	559	1,103	1,670
Food/Beverage	161	299	437
Total	1,844	2,747	3,660

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.47 Retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in North Walsham town centre and represents 68% of the total floorspace projection for North Walsham over the plan period. The health and vitality of North Walsham town centre is relatively fragile and will be vulnerable to impacts of development under 2,500 sq.m gross. A locally set threshold of 500 sq.m gross would be appropriate for retail and leisure development in North Walsham, reflecting the scale and vulnerability of the town centre.
- 6.48 The reoccupation of vacant units should be the priority in order to enhance the vitality and viability of the town centre. Vacant shop units within North Walsham town centre might reasonably accommodate around 1,300 sq.m gross, which is nearly 70% of the floorspace projection up to 2026. Taking into account vacant shop units, further long term development sites to accommodate around 500 sq.m gross by 2026 will need to be identified, increasing to around 1,400 sq.m gross by 2031, and 2,400 sq.m gross by 2036.
- 6.49 The North Norfolk Site Allocations DPD 2011 suggests opportunities for town centre development have been limited, due to the size of existing units available and the historic nature of the town centre (Conservation Area and Listed Buildings). The DPD allocates three sites for retail or mixed use development in North Walsham, as follows:
- Land at Norwich Road / Nursery Drive (NW01 – 24.5ha);
 - Paston College Lawns Site (NW44 – 1.5ha)
 - Vicarage Street Car Park (ROS8 - 0.36 ha)
- 6.50 The Core Strategy indicates around 400 dwellings will be provided at Norwich Road. Development has now commenced in this location and it is expected that growth will generate retail expenditure, and if this can be retained in North Walsham than it will help to support the town centre.
- 6.51 The Council is currently preparing the future growth strategy for the District. It is understood that although the final distribution is yet to be agreed it is likely that the District's towns will continue to be the main focus for development and that North Walsham could potentially see larger scale growth. Growth of 1,500 – 2,000 dwellings could accommodate around 4,500 people which would generate (at 2036) retail expenditure of over £38 million. If a quarter of this expenditure can be retained by new local facilities, then a local centre of around 1,000 sq.m gross could be provided. Residential development of this size could also support further larger scale comparison growth (edge of centre) of up to 2,000 sq.m gross, which could and help claw back existing expenditure leakage from the town.
- 6.52 The Council has advised that the Paston College Lawns Site is no longer available as the college have indicated their intention to stay in the immediate future.
- 6.53 Vicarage Street Car Park is identified for a mixed use redevelopment comprising retail, commercial and community uses, approximately 20 dwellings on upper floors and re-provision

of some car parking. Medium size retail units (up to 1,500 sq.m gross in total) could be provided on the Vicarage Road frontage.

- 6.54 If delivered these opportunities and vacant shop units are sufficient to meet the floorspace projection up to 2036. If some of these sites cannot be delivered then the St. Nicholas Court area is a possible long term redevelopment opportunity where retail use could be intensified, if the long term projection for additional floorspace is required. This redevelopment is probably not viable in the short terms due to the existing imbalance between operator demand and the supply of shop units in North Walsham.
- 6.55 The designated North Walsham town centre boundary contains 110 Class A retail/service units. Over 80% of the shop units are located within the designated primary shopping area (PSA). Lichfields' land use survey indicates the designated town centre boundary and primary shopping area remain appropriate. However the Sainsbury's store and car park is located within the town centre boundary. This store is not particularly well connected to the rest of the town centre, and the Council could consider excluding this store from the town centre boundary. The benefit of this amended boundary would be to ensure any significant intensification of retail use on the site would need to consider the sequential and impact tests, order to protect the vitality and viability of the town centre.
- 6.56 Most of the PSA units are located within the primary retail frontages. The proportion of non-A1 retail measured shop frontage within the primary retail frontages is around 50%, significantly above the 30% maximum. None of the six primary frontages have less than 30% non-A1 retail measured shop frontage. The 30% threshold has been breached in all sections of the primary retail frontages. The primary retail frontages represent the prime shopping pitch around the Market Place. The unprotected frontages in the rest of the PSA and vacant units available provide significant flexibility to attract investment from non-A1 uses.
- 6.57 In our view the predominance of Class A1 uses within the primary retail frontages should be maintained in North Walsham in order to maintain the vitality and viability of the centre. However the maximum threshold for non-A1 uses within the primary retail frontages should be increased to at least 40% and possibly 50%. This increase in threshold could help to reduce the high shop vacancy rate in North Walsham and enhance the vitality and viability of the town centre. The floorspace projections suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA.

Holt

- 6.58 Holt has the fourth largest retail provision in terms of sales floorspace in the District. The centre has a very low shop vacancy rate and appears to be trading healthily. The centre has a relatively high number of comparison goods shops. Most of shops are small independent outlets, but there is a selection of high end multiples. The centre has a lower proportion of non-retail services but the overall choice is satisfactory. Holt has established niche shopping role with a range of shops and other services that serves the local population and tourist visitors. A key issue with Holt is the pressure on car parking to meet these customer's needs as suggested by the household survey results.
- 6.59 Holt retains a relatively high proportion (39%) of food/beverage expenditure within its local study area zone (Zone 2A), but a lower retention of convenience (24%) and comparison (21%) expenditure. The proposed new Aldi store should help to address the relatively low retention of convenience goods expenditure. Holt should continue to be designated as a second tier town centre within the retail hierarchy in North Norfolk to maintain its current roles. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.4.

- 6.60 As in the larger town centres, retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Holt town centre and exceeds the total floorspace projection for Holt over the plan period. A locally set threshold of 500 sq.m gross would be appropriate for retail and leisure development in Holt reflecting the existing scale of the town centre and the floorspace projections shown in Table 6.4.

Table 6.4 Holt Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	0	0	0
Comparison	297	852	1,431
Food/Beverage	196	371	545
Total	493	1,223	1,976

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.61 The shop vacancy rate in Holt is low and there is limited potential to accommodate growth within vacant shop units. The North Norfolk Site Allocations DPD 2011 does not allocate development sites within Holt town centre and there appear to be limited opportunities within the historic core. The Core Strategy indicated that approximately 300 homes would be allocated in Holt in addition to existing commitments. Since then the allocated sites and an additional windfall development of 153 dwellings on Cromer Rd are all coming forward. Increased car parking provision at Thornage Road is also allocated through the existing Local Plan and the town council have secured additional long term parking on Cley Road through s106 contributions on the residential development on land west of Woodfield Road.
- 6.62 The relatively small scale and dispersed nature of the individual sites is unlikely to provide an appropriate or viable critical mass for on-site retail provision without attracting trade from other residents. There is limited potential to accommodate growth within vacant units and limited opportunities within Holt's historic core. Through the Local Plan consideration could be given to accommodating some local growth through further mixed use development, or alternatively the remaining retail capacity could be redistributed towards Cromer.
- 6.63 The designated Holt town centre primary shopping area contains 164 Class A retail/service units. A small proportion (about 20%) of these units is located within the primary retail frontages. The proportion of non-A1 retail measured shop frontage within the primary retail frontages is around 37%, above the 30% maximum. Three of the six primary frontages exceed the 30% threshold i.e. numbers 2-16 High Street, 1 to 23 High Street and 1B to 7 Market Place. The proportion of non-A1 frontage is significantly below the threshold in other frontages.
- 6.64 The primary retail frontages in Holt represent a small part of the town centre. The primary frontages represent the prime shopping pitch within the central part of the High Street and Market Place. The extensive unprotected frontages in the rest of the PSA and the large number of shop units within the wider designated town centre provide significant flexibility for changes of use and the introduction of non-A1 uses.
- 6.65 In our view a predominance of Class A1 uses should be maintained in Holt's primary retail frontages, in order to maintain the town centre's high end niche shopping role. Holt has an appropriate mix of retail and non-retail uses and the vacancy rate remains much lower than the national average. Limited changes since the Core Strategy was adopted in 2008 suggest the current coverage of the primary retail frontages within Holt is appropriate and the 30% maximum for non-A1 uses should be maintained. The floorspace projections suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA.

Sheringham

- 6.66 Sheringham as the fifth largest retail provision in terms of sales floorspace in the District. Sheringham town centre has a reasonably high proportion of comparison goods shops and has a shop vacancy rate much lower than the national average. The town centre offers a choice of shops and services that serve resident and tourists. The town centre has a particularly strong provision of restaurant/cafés.
- 6.67 Sheringham is an attractive seaside town and tourist attraction. The town centre benefits from day-trips and longer stays visitors throughout the year. Sheringham has a good range of facilities catering for residents in the town and catchment area and tourist visitors. The town centre has an attractive and distinctive townscape and appears to be healthy and vibrant.
- 6.68 Sheringham retains a reasonable proportion of convenience goods (28%) and food/beverage (27%) of expenditure within its local study area zone (Zone 2B), but a lower retention of comparison goods (12%) expenditure. Sheringham should continue to be designated as a second tier centre within the retail hierarchy in North Norfolk to maintain these important roles. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.5.

Table 6.5 Sheringham Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	588	666	740
Comparison	547	870	1,301
Food/Beverage	268	540	815
Total	1,403	2,076	2,856

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.69 Retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Sheringham town centre and represents 88% of the total floorspace projection for Sheringham over the plan period. A locally set threshold of 500 sq.m gross would be appropriate for retail and leisure development in Sheringham reflecting the existing scale of the town centre and the floorspace projections shown in Table 6.5.
- 6.70 The shop vacancy rate in Sheringham is low and there is limited potential to accommodate growth within vacant shop units. The North Norfolk Site Allocations DPD 2011 identifies one development opportunity in Sheringham town centre for retail use. The land adjacent to the Clock Tower (ROS5 – 1ha) is central to the main shopping area and is identified for redevelopment for a range of commercial and other uses, with residential on upper floors. The site is in multiple ownerships and there are a number of existing uses on the site, therefore site assembly suggests this site is a medium to long term opportunity. If comprehensive mixed use development is delivered then the amount of additional retail floorspace at ground floor level could be 3,000 sq.m gross assuming a plot density of around 40%. An arcade could link Station Road with New Road and Cremer Street. This site has the physical capacity to accommodate Sheringham's overall floorspace projection up to 2036.
- 6.71 If this site cannot be assembled/delivered then as an alternative, the surface car park adjacent to Sheringham Railway Station is the most obvious edge-of-centre location where new development could be accommodated, but replacement car parking would need to be provided. Alternatively some of the floorspace projection could be transferred to Cromer.
- 6.72 The designated Sheringham town centre boundary contains 162 Class A retail/service units. Over 80% of the shop units are located within the designated primary shopping area (PSA).

Lichfields' land use survey indicates the designated town centre boundary and primary shopping area remain appropriate.

- 6.73 Around 70% of the PSA units are located within the primary retail frontages. The proportion of non-A1 retail measured shop frontage within the primary retail frontages is around 39%, significantly above the 30% maximum. None of the six primary frontages have less than 30% non-A1 retail shop frontage. The 30% threshold has been breached in all parts of the primary retail frontages. The designated primary frontages represent the prime shopping pitch within the High Street, Station Road and part of Church Street. The unprotected frontages in the rest of the PSA and wider town centre provide significant flexibility to attract investment from non-A1 uses.
- 6.74 In our view a predominance of Class A1 uses should be maintained in Sheringham's primary retail frontages in order to maintain the vitality and viability of the centre and to retain a balance between tourist related uses and facilities servicing local residents. However the maximum threshold for non-A1 uses within the primary retail frontages should be increased to 35%, because the 30% limit has been breached in all sections of the primary retail frontages. The floorspace projections suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA.

Hoveton/Wroxham

- 6.75 Hoveton/Wroxham has the third smallest retail provision in terms of sales floorspace in the District, and much of this floorspace is provided within Roys of Wroxham. The presence of the Roys is unusual in a settlement of this size, and suggests Roys has a wide draw, including tourist visitors. Roys is supported by a limited range of independent retailers. The centre has a relatively low provision of non-retail services, but a high proportion of restaurants reflecting its role as a tourist destination. The commercial and shopping centre extends from the bridge area along Norwich Road and to part of Station Road. The commercial is fragmented and would benefit from environmental improvements.
- 6.76 Hoveton/Wroxham retains a low proportion of convenience goods (14%), comparison goods (8%) and food/beverage (5%) of expenditure within its local study area zone (Zone 3B), which underlines the importance of trade from tourists. In order to maintain its dual role, serving local residents and tourists, Hoveton/Wroxham should continue to be designated as a second tier centre within the retail hierarchy in North Norfolk. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.6.

Table 6.6 Hoveton/Wroxham Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	0	0	0
Comparison	342	643	957
Food/Beverage	88	182	277
Total	430	825	1,234

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.77 Retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Hoveton/Wroxham and is more than double the total floorspace projection over the plan period. A locally set threshold of 500 sq.m gross would be appropriate for retail and leisure development in Hoveton/Wroxham reflecting the existing scale of the town centre and the floorspace projections shown in Table 6.6.
- 6.78 The shop vacancy rate in the town centre is low and there is limited potential to accommodate growth within vacant shop units. The North Norfolk Site Allocations DPD 2011 does not allocate

development sites within the town centre. The short term need up to 2026 could be accommodated by small in-fill developments, shop extensions and expansion into upper floors. In the longer term residual growth, if achieved, could be accommodated on surface car parks around the centre or alternatively growth could be redistributed to North Walsham.

- 6.79 Lichfields' land use survey identified 58 Class A retail/service units in Hoveton/Wroxham clustered east of the River Bure on Norwich Road, the Riverside Centre, Church Road, Stalham Road and Station Road. The primary shopping area currently only includes units to the east of Station Road. However there is a concentration of retail/services uses between Station Road and the River Bure, along both sides of Norwich Road. The Council should consider extending the primary shopping area within this area.
- 6.80 Given the dominance of Roys of Wroxham (i.e. a small number of large Class A1 units) and the predominance/scatter nature of tourist related facilities, primary shopping frontages protecting Class A1 retail appears unnecessary. A policy criterion could be introduced to protect against the loss of Class A1 to A5 uses more generally within the extended primary shopping area.

Stalham

- 6.81 Stalham has the second smallest retail provision in terms of sales floorspace in the District. It retains a low proportion of comparison goods (7%) and food/beverage (8%) of expenditure within its local study area (Zone 3B), but a reasonable proportion of convenience goods expenditure (14%).
- 6.82 The mix of uses within the town centre is similar to the national average but the choice of facilities is limited. The vacancy rate is relatively high when compared with other centres in the District, with the exception of North Walsham. The health and vitality of Stalham is more vulnerable than other smaller town centres in North Norfolk and the centre would benefit from qualitative improvements and investment. In order to encourage these improvements, Stalham town centre should continue to be designated as a second tier centre within the retail hierarchy. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.7.

Table 6.7 Stalham Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	323	399	471
Comparison	137	268	404
Food/Beverage	53	107	162
Total	513	774	1,037

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.83 Retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Stalham and is more than double the total floorspace projection over the plan period. The health and vitality of Stalham town centre is relatively fragile and will be vulnerable to impacts of development significantly below 2,500 sq.m gross. A locally set threshold of 250 sq.m gross would be appropriate for retail and leisure development in Stalham reflecting the scale and vulnerability of the town centre and the floorspace projections shown in Table 6.7.
- 6.84 Stalham has the second highest shop vacancy rate in the District. The reoccupation of vacant units should be the priority in order to enhance the vitality and viability of the town centre. Vacant shop units within Stalham town centre might reasonably accommodate 300 sq.m gross,

which is nearly 60% of the floorspace projection up to 2026. Taking into account vacant shop units, further long term development sites to accommodate around 500 sq.m gross by 2031 will need to be identified, increasing to around 700 sq.m gross by 2036.

- 6.85 The Core Strategy previously allocated land adjacent to Church farm for mixed use development and this is now coming forward for residential use. The Council is currently preparing the future growth strategy for the District. It is understood that although the final distribution is yet to be agreed it is likely that the Districts towns will continue to be the main focus for development. Should Stalham receive any further allocations it is considered that local facilities in this location should only be promoted at the latter part of the plan period in order to maintain the vitality and viability of Stalham town centre, recognising the short term priority is to reduce vacant shop units within the town centre. The remaining retail capacity could be redistributed towards North Walsham.
- 6.86 The designated Stalham town centre boundary contains 73 Class A retail/service units. About two thirds of the shop units are located within the designated primary shopping area (PSA). Lichfields' land use survey indicates the designated town centre boundary and primary shopping area remain appropriate.
- 6.87 Nearly all the PSA units are located within the primary retail frontages. The proportion of non-A1 retail measured shop frontage within the primary retail frontages is around 43%, significantly above the 30% maximum. Only one of the five primary frontages have less than 30% non-A1 retail shop frontage. The 30% threshold has been breached in most sections of the primary retail frontages.
- 6.88 In our view a retail core with a predominance of Class A1 uses should be maintained in Stalham in order to maintain the vitality and viability of the centre and to retain a balance of uses. However the maximum threshold for non-A1 uses within the primary retail frontages should be increased to at least 45% and possibly 50%. This reduction could help to reduce the relatively high shop vacancy rate in Stalham and enhance the vitality and viability of the town centre.

Wells-next-the-Sea

- 6.89 Wells-next-the-Sea has the smallest retail provision in terms of sales floorspace in the District. The centre has a low vacancy rate and a reasonable selection of comparison and convenience shops and non-retail services for a centre of its size. There is a high proportion of restaurant/cafés reflecting its role as a tourist destination. The centre has an important role as a service centre for residents and tourist visitors. For a settlement of its size the town centre provides a good range of shops, services and community facilities. The survey results suggest residents rely on the larger towns e.g. Fakenham for main bulk food shopping and non-food shopping.
- 6.90 Wells-next-the-Sea retains a low proportion of convenience goods (6%), comparison goods (1.5%) and food/beverage (10%) of expenditure within its local study area zone (Zone 1), which underlines the importance of trade from tourists. In order to maintain its dual role serving local residents and tourists, Wells-next-the-Sea should continue to be designated as a second tier centre within the retail hierarchy in North Norfolk. The floorspace projections Class A retail and food and beverage floorspace are shown in Table 6.8.
- 6.91 Retail development of 2,500 sq.m gross would be significant in relation to the scale of existing retail provision in Wells-next-the-Sea and is nearly five times the total floorspace projection over the plan period. A locally set threshold of 250 sq.m gross would be appropriate for retail and leisure development in Wells-next-the-Sea reflecting the reflecting the scale of the town centre and the floorspace projections shown in Table 6.8.

Table 6.8 Wells-next-the-Sea Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	11	24	39
Comparison	84	153	223
Food/Beverage	96	195	294
Total	191	372	556

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.92 The shop vacancy rate in the town centre is low and there is limited potential to accommodate growth within vacant shop units. The North Norfolk Site Allocations DPD 2011 does not allocate development sites within the town centre and there appear to be limited development opportunities. Development within Wells-next-the-Sea is likely to be small in-fill developments, shop extensions and expansion into upper floors.
- 6.93 The designated Wells-next-the-Sea town centre boundary contains 82 Class A retail/service units. Most (87%) of the shop units are located within the designated primary shopping area (PSA). Lichfields' land use survey indicates the designated town centre boundary and primary shopping area remain appropriate. The proportion of Class A1 uses within the town centre is significantly above the national average and the vacancy rate is very low.
- 6.94 There are no designated primary retail frontages within the PSA, which appears inconsistent in relation to the designation of protected primary frontages in Stalham. The Council should consider introducing primary retail frontages along Staithe Street in order to retain a balance between tourist related uses and facilities servicing local residents. The Quay would remain the focus for non-retail related tourist facilities. Lichfields' land use survey suggest a maximum threshold of 30% for non-A1 retail uses would be appropriate if the Council decides to designate primary retail frontages. A policy criterion could be introduced to protect against the loss of Class A1 to A5 uses more generally within the extended primary shopping area.

Other Centres

- 6.95 As indicated above, retail and leisure growth should be focused in the main town centres where there are the best prospects for attracting investment. The floorspace projections suggest there is limited potential for growth in other smaller centres/villages in North Norfolk District, up to about 2,000 sq.m gross Class A1 to A5 by 2036, as shown in Table 6.9.

Table 6.9 Other Centres Floorspace Projections (Sq.M Gross)

Type	By 2026	By 2031	By 2036
Convenience	0	11	59
Comparison	268	483	710
Food/Beverage	433	851	1,271
Total	701	1,345	2,040

Source: Table 13 in Appendix 2, Table 14 in Appendix 3 and Table 11 in Appendix 4.

- 6.96 This is consistent with the approach set out in the existing development plan, which indicates the large town centres will be the focal point for new retail development in the District, and additional floorspace within other centres is expected to be limited. Development within smaller centres/village is likely to be small in-fill developments, shop extensions and expansion into upper floors.

7.0 Summary and Conclusions

7.1 This report provides a district wide needs assessment for retail and commercial leisure development in North Norfolk. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in North Norfolk

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development over the plan period up to 2036. When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

Convenience Goods Retail

7.3 The quantitative assessment of the potential capacity for retail floorspace suggests that there is limited scope for new convenience goods development within North Norfolk, over and above planned commitments. The convenience goods projections suggest new floorspace could be distributed as shown in Table 7.2.

Table 7.1 Convenience Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2016 -2026	2026 - 2036	Total
Cromer	0	0	0
Fakenham	0	0	0
Holt	0	0	0
North Walsham	1,124	429	1,553
Sheringham	588	152	740
Hoveton/Wroxham	0	0	0
Stalham	323	148	471
Wells-next-the-Sea	11	28	39
Other North Norfolk	0	59	59

Source: Table 13 in Appendix 2.

7.5 In qualitative terms, food store and convenience retail provision is particularly strong in the Cromer/Sheringham area, Fakenham and North Walsham. Provision Wells-next-the-Sea is limited to top up food shopping, but residents in this area have good access to large stores in Fakenham, and this small settlement's population is unlikely to support a large food store. Stalham and Hoveton/Wroxham have good provision for towns of their size, and residents also have access to larger stores in North Walsham, Norwich and Great Yarmouth.

7.6 Holt is the most obvious area of qualitative deficiency in food store provision in North Norfolk District. The proposed Aldi store will help to address this deficiency and will reduce expenditure leakage to surrounding towns.

Comparison Goods Retail

- 7.7 The comparison goods projections suggest new floorspace could be distributed as shown in Table 7.2.

Table 7.2 Comparison Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2016 -2026	2026 - 2036	Total
Cromer	1,182	2,282	3,464
Fakenham	1,042	2,011	3,053
Holt	297	1,134	1,431
North Walsham	559	1,111	1,670
Sheringham	457	844	1,301
Hoveton/Wroxham	342	615	957
Stalham	137	267	404
Wells-next-the-Sea	84	142	226
Other North Norfolk	268	442	710

Source: Table 14 in Appendix 3.

- 7.9 Comparison goods retail provision is reasonably strong the District, particularly in Fakenham and Cromer, and to a lesser extent Holt which has wide appeal and high end specialist facilities. However the clothing and footwear shopping offer is weaker in the District, and tends to cater predominantly for older customers, with moderate or traditional tastes. Consequently there is a high level of leakage for these types of goods, especially towards the fashion end of the market. The key driver in the relative attraction of large comparison destination is the range and choice of clothing. Cromer and Fakenham will continue to be the main comparison shopping centres in North Norfolk, and provide a reasonable range of comparison shops. The other smaller centres have a more limited selection of comparison shops. Key to improving the relative strength of the District's towns will be improvements to increasing the fashion offer.
- 7.10 Residents within all zones in the District are served by at least 2 or 3 main centres that are locally accessible. Residents also have the choice of visiting larger centres for higher order comparison goods shopping, particularly for clothing/fashion shopping. Norwich is reasonably accessible from all parts of the District, and residents to the west have access to Kings Lynn, whilst residents to the east have access to Great Yarmouth. Despite this access to larger centres, North Norfolk retains a sustainable market share of comparison goods expenditure.
- 7.11 Investment will be needed in the District in order to retain existing levels of comparison goods expenditure. The objective of the development strategy for North Norfolk should be to maintain the District's shopping role and market share within the sub-region. The projections in Table 7.2 assume that new development will retain the district's share of comparison expenditure in the study area and will help to maintain this share in the future.

Meeting Other Town Centre Needs

Food and Beverage

- 7.12 The food and beverage projections suggest new floorspace could be distributed as shown in Table 7.3.
- 7.13 Towns in North Norfolk generally have a good provision of food and beverage outlets. The proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) are generally comparable or higher than the mirror the national average in most town centres. The main tourist destinations have a particularly good provision of restaurant/café uses i.e. Cromer,

Sheringham, Wells-next-the-Sea and Hoveton/Wroxham. Growth in expenditure should provide opportunities to improve food and beverage provision within all towns.

Table 7.3 Food and Beverage Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2016 -2026	2026 - 2036	Total
Cromer	253	491	744
Fakenham	228	410	638
Holt	196	349	545
North Walsham	161	276	437
Sheringham	268	547	815
Hoveton/Wroxham	88	189	277
Stalham	53	109	162
Wells-next-the-Sea	96	198	294
Other North Norfolk	433	838	1,271

Source: Table 11 in Appendix 4.

Other Town Centre Uses

7.15 North Norfolk has a reasonable range of commercial leisure, entertainment and culture facilities. Residents also have access to facilities outside the district, including Norwich, Kings Lynn and Great Yarmouth. Most of the key sectors are present in North Norfolk for e.g. cinemas, gyms, theatres and ten pin bowling. A summary of the key conclusions are set out below.

- There is theoretical capacity for an additional small (2-3 screens) cinema in North Norfolk District over the plan period. The most obvious area of deficiency is North Walsham. However access to cinemas in Norwich may restrict operator demand and therefore there is no need to allocate a site for a new cinema in the development plan.
- There is capacity for at two small (25 fitness stations each) health and fitness clubs over the plan period. The most obvious areas of deficiency are Cromer and Holt.
- There may be scope for an additional small (4-6 lanes) tenpin bowling in the Cromer/Sheringham area, supported by a combination of local residents and tourist visitors.
- North Norfolk's dispersed population and proximity to Norwich will restrict the scope for a commercial bingo facility or a theatre.

The Hierarchy of Centres

7.16 The development plan should continue to identify the hierarchy of centres within North Norfolk. The analysis and projection in this report suggests no changes to the current hierarchy are considered necessary. There have been limited changes since the current development plan was adopted in 2008. All the designated Large and Small town centres perform important roles that should be maintained in order to meet the needs of residents and visitors.

7.17 Consistent with the sequential approach, the large town centres, i.e. Cromer, Fakenham and North Walsham are expected to be the main focus for retail and leisure development. These large town centres have the best prospects for attracting investment from developers and multiple operators.

7.18 Large-scale development which serves a significant part of the District should be located in the large town centre. Smaller town centres should complement the larger town centres, by providing for convenience food shopping and lower order day to day comparison shopping facilities and other services. The local/village centres should cater for top-up and basket

convenience shopping and services, but are likely to provide a more limited range of comparison shopping.

- 7.19 Development plan policies should maintaining the hierarchy of centres by:
- 1 permitting appropriate town centre uses in order to meet the needs of residents and visitors to accommodate growth;
 - 2 focus retail, commercial leisure and entertainment uses within town centres (with retail uses focused within the Primary Shopping Areas and other town centre uses within the wider town centre boundaries;
 - 3 restricting retail and other town centre uses outside the defined town centres where they fails the sequential approach or impact tests (see impact thresholds below).
 - 4 continue to define primary retail frontages within the main centres to retain an appropriate mix of uses and a predominance of Class A1 retail use within the prime pitch (see boundaries and frontages below).

Accommodating Growth

- 7.20 The global projections for the District up to 2026 suggest there is scope for around 7,600 sq.m gross of Class A1 to A5 floorspace. The long term projections up to 2036 suggest there is scope for about 20,700 sq.m gross of Class A1 to A5 floorspace.
- 7.21 The short term priority should be the reoccupation of vacant floorspace within centres where the vacancy rate is relatively high. The reoccupation of vacant shop units could accommodate about 2,600 sq.m gross of Class A1 to A5 retail space, about a third of the short term floorspace projection up to 2026.
- 7.22 The application of shop frontage policies will protect the loss of vacant shop units and will help to encourage appropriate new uses. Long term vacant premises could be targeted and more actively marketed and shopfront/fit-out grants could be considered to assist their reoccupation.

Cromer

- 7.23 Vacant shop units within Cromer town centre might reasonably accommodate around 500 sq.m gross. Taking into account vacant shop units, further sites to accommodate around 900 sq.m gross by 2026 will need to be identified, increasing to around 3,700 sq.m gross by 2036.
- 7.24 Mixed use development of land between Loudon Road and Church Street could accommodate an uplift of 800 sq.m gross. Land south of Loudon Road could provide around 1,000 – 1,500 sq.m gross. If delivered these sites and vacant shop units could accommodate up to 2,800 sq.m gross, which is around two thirds of the long term projection up to 2036. Development elsewhere in the town centre is likely to be small scale infill/extensions. If additional sites need to be identified to accommodate long term demand then the surface car parks to the south and west of the town centre at The Croft and Cadogan Road are the most obvious edge-of-centre locations where large scale development could be accommodated, but replacement car parking would need to be provided. Alternatively intensification within the out-of-centre retail parks could be considered, if the sequential and impact tests are met.

Fakenham

- 7.25 Vacant shop units within Fakenham town centre might reasonably accommodate around 500 sq.m gross. Further sites to accommodate around 800 sq.m gross by 2026 will need to be identified, increasing to around 3,200 sq.m gross by 2036.

- 7.26 The urban expansion on land north of Rudham Stile Lane could support a local centre of around 700 sq.m gross. Land to the south of Fakenham town centre could accommodate up to 2,000 sq.m gross of retail floorspace at ground floor level. The development could be extended further south in the longer term to accommodate the retail floorspace projection for Fakenham up to 2036.

North Walsham

- 7.27 Vacant shop units within North Walsham town centre might reasonably accommodate around 1,300 sq.m gross, which is nearly 70% of the floorspace projection up to 2026. Taking into account vacant shop units, further long term development sites to accommodate around 500 sq.m gross by 2026 will need to be identified, increasing to around 2,400 sq.m gross by 2036.
- 7.28 The Core Strategy indicates around 400 dwellings will be provided at Norwich Road. Policy NWO1 indicates that retail use may be permitted where it serves the needs of the proposed development. This scale of residential development should be supported by local shopping provision to ensure residents have access to day to day facilities within walking distance.
- 7.29 The Council is currently preparing the future growth strategy for the District but the final distribution is yet to be agreed. The provision of 1,500 – 2,000 dwellings in North Walsham could support a new local centre of around 1,000 sq.m gross. Residential development of this size could also support further larger scale comparison growth of up to 2,000 sq.m gross to serve the wider town and help claw back expenditure leakage.
- 7.30 Vicarage Street Car Park is could provide up to 1,500 sq.m gross. The St. Nicholas Court area is a possible long term redevelopment opportunity where retail use could be intensified. Additional floorspace could also be provided in new development in accordance with larger scale residential growth and to retain market share.

Holt

- 7.31 There is limited potential to accommodate growth within vacant shop units and there are limited development opportunities within the historic core. The existing Aldi store commitments will absorbed over 40% of the global floorspace projection for Holt up to 2036. The remaining retail capacity could be redistributed towards Cromer.

Sheringham

- 7.32 There is limited potential to accommodate growth within vacant shop units. The land adjacent to the Clock Tower could accommodate 3,000 sq.m gross and has the physical capacity to accommodate Sheringham's overall floorspace projection up to 2036. If this site cannot be assembled/delivered then as an alternative, the surface car park adjacent to Sheringham Railway Station is the most obvious edge-of-centre location where new development could be accommodated, but replacement car parking would need to be provided. Alternatively some of the floorspace projection could be transferred to Cromer.

Hoveton/Wroxham

- 7.33 There is limited potential to accommodate growth within vacant shop units and no development sites are allocated within Hoveton/Wroxham town centre. The short term need up to 2026 could be accommodated by small in-fill developments, shop extensions and expansion into upper floors. In the longer term residual growth, if achieved, could be accommodated on surface car parks around the centre or alternatively growth could be redistributed to North Walsham.

Stalham

- 7.34 The reoccupation of vacant units should be the priority in order to enhance the vitality and viability of the town centre. Vacant shop units could accommodate 300 sq.m gross, which is nearly 60% of the floorspace projection up to 2026. Taking into account vacant shop units, further long term development sites to accommodate around 700 sq.m gross by 2036.
- 7.35 The Core Strategy previously allocated land adjacent to Church farm for mixed use development, which is now coming forward for residential use. Local facilities in any further allocations should only be promoted at the latter part of the plan period in order to maintain the vitality and viability of Stalham town centre, recognising the short term priority is to reduce vacant shop units. The remaining retail capacity could be redistributed towards North Walsham.

Wells-next-the-Sea

- 7.36 The floorspace projection in Wells-next-the-Sea is relatively small, around 600 sq.m gross by 2036. There is limited potential to accommodate growth within vacant shop units and there appear to be limited development opportunities in the town centre. Development within Wells-next-the-Sea is likely to be small in-fill developments, shop extensions and expansion into upper floors.

Other Centres

- 7.37 The floorspace projections suggest there is limited potential for growth in other smaller centres/villages in North Norfolk District, up to about 2,000 sq.m gross Class A1 to A5 by 2036. Development within these centres is likely to be small in-fill developments, shop extensions and expansion into upper floors.

Impact Thresholds

- 7.38 The impact threshold in the NPPF (over 2,500 sq.m gross) is disproportionate in relation to the existing scale of all town centres within North Norfolk, and development of this scale would exceed or represent a significant proportion of the overall floorspace projection for each town over the plan period. The impact of smaller development needs to be considered. The following impact thresholds are considered to be appropriate in North Norfolk:
- Cromer and Fakenham over 1,000 sq.m gross;
 - North Walsham, Sheringham, Holt and Hoveton/Wroxham over 500 sq.m gross; and
 - Stalham and Wells-next-the Sea over 250 sq.m gross.

Centre Boundaries and Frontages

- 7.39 Future plan policies should continue to define primary retail frontages, primary shopping areas and town centre boundaries, necessary for applying the sequential approach and also maintain an appropriate mix of uses within the town centres.
- 7.40 The town centre boundaries include retail, leisure and other town centre uses within each town centre. Within the wider town centre boundary the primary shopping areas (PSA) should contain the retail frontages where Class A1 to A5 uses area concentrated. The application of the sequential approach indicates that Class A1 to A5 uses should be focused within the PSA. Other town centre uses such as commercial leisure and office uses should be focused within the wider town centre boundary.

- 7.41 Lichfields' analysis suggests the current town centre boundaries and PSA designations remain appropriate and no changes are recommended. However the following minor alterations could be considered by the Council.
- A new policy criterion could be introduced to protect against the loss of Class A1 to A5 uses within the designated primary shopping area in all centres, which would serve the same function as designated secondary frontages.
 - Sainsbury's store and car park in North Walsham is not well connected to the rest of the town centre. This store could be excluded from the town centre boundary to ensure any intensification of retail use on the site would need to consider the sequential and impact tests.
 - The primary shopping area in Hoveton/Wroxham only includes units to the east of Station Road. The retail/services uses between Station Road and the River Bure, along both sides of Norwich Road could be included within an extended primary shopping area.
 - Given the dominance of Roys of Wroxham (i.e. a small number of large Class A1 units) and the predominance/scatter nature of tourist related facilities, primary shopping frontages protecting Class A1 retail appears unnecessary. A policy criterion could be introduced to protect against the loss of Class A1 to A5 uses more generally within the extended primary shopping area.
- 7.42 The designated primary frontages should contain a predominance of Class A1 retail use as recommended by the NPPF. In most centres the primary retail frontages make up a small part of the town centre as a whole. The primary retail frontages represent the prime pitch in each centre, where there is concentration of Class A1 uses. In many cases the 30% maximum limit on the proportion of measured frontage in non-Class A1 frontage has been breached. However the unprotected frontages in the rest of the town centre provides significant flexibility for changes of use and the introduction of non-A1 uses, if market forces require this space to respond to customer's needs.
- 7.43 In our view the primary retail frontages should continue be protected to maintain a predominance of Class A1 uses in order to maintain the vitality and viability of the main town centres. All town centre have maintained an appropriate mix of retail and non-retail uses and the vacancy rate remains low in most centres, with the exception of North Walsham and Stalham. Limited changes since the Core Strategy was adopted in 2008 suggest the current coverage of the primary retail frontages is appropriate, but the 30% maximum for non-A1 uses needs to be reviewed on a case by case basis. The centres where an alternative figure could be considered are as follows:
- **North Walsham** – consider a maximum of 40% to 50% because the 30% has been breached in all primary retail frontages and the shop vacancy rate is relatively high. The primary retail includes most of the PSA. An increase in the threshold should help to reduce the high shop vacancy rate in North Walsham and enhance the vitality and viability of the town centre.
 - **Sheringham** – consider a maximum of 35% because the 30% has been breached in all primary retail frontages, although the vacancy rate is relatively low. It may only be necessary to increase the threshold if the vacancy rate increases in Sheringham in the future.
 - **Hoveton/Wroxham** – the designation of primary retail frontages is not considered necessary due to the dominance of Roys of Wroxham and the predominance of tourist related facilities.

- **Stalham** – consider a maximum of 45% to 50% because the 30% has been breached in most primary retail frontages and the shop vacancy rate is relatively high. An increase in the threshold should help to reduce the high shop vacancy rate in Stalham and enhance the vitality and viability of the town centre
- **Wells-next-the-Sea** – consider the designation of primary retail frontages on Staithe Street in order to retain a balance of uses with a maximum threshold of 30% for non-A1 uses.

7.44 The retail floorspace projections in this study suggest it is necessary to protect against the loss of Class A1 to A5 uses more generally within the PSA. The Council should consider introducing a policy that restricts the loss of Class A1-A5 uses within secondary frontages, notwithstanding the temporary changes to the GPDO. A policy criteria could be introduced that restricts changes of use at ground floor level from Class A1- A5 to other uses within the PSA.

Future Monitoring

7.45 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and leisure development in the short - medium term up to 2026, with longer term forecast up to 2036. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections after 2026 should be treated with caution.

7.46 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

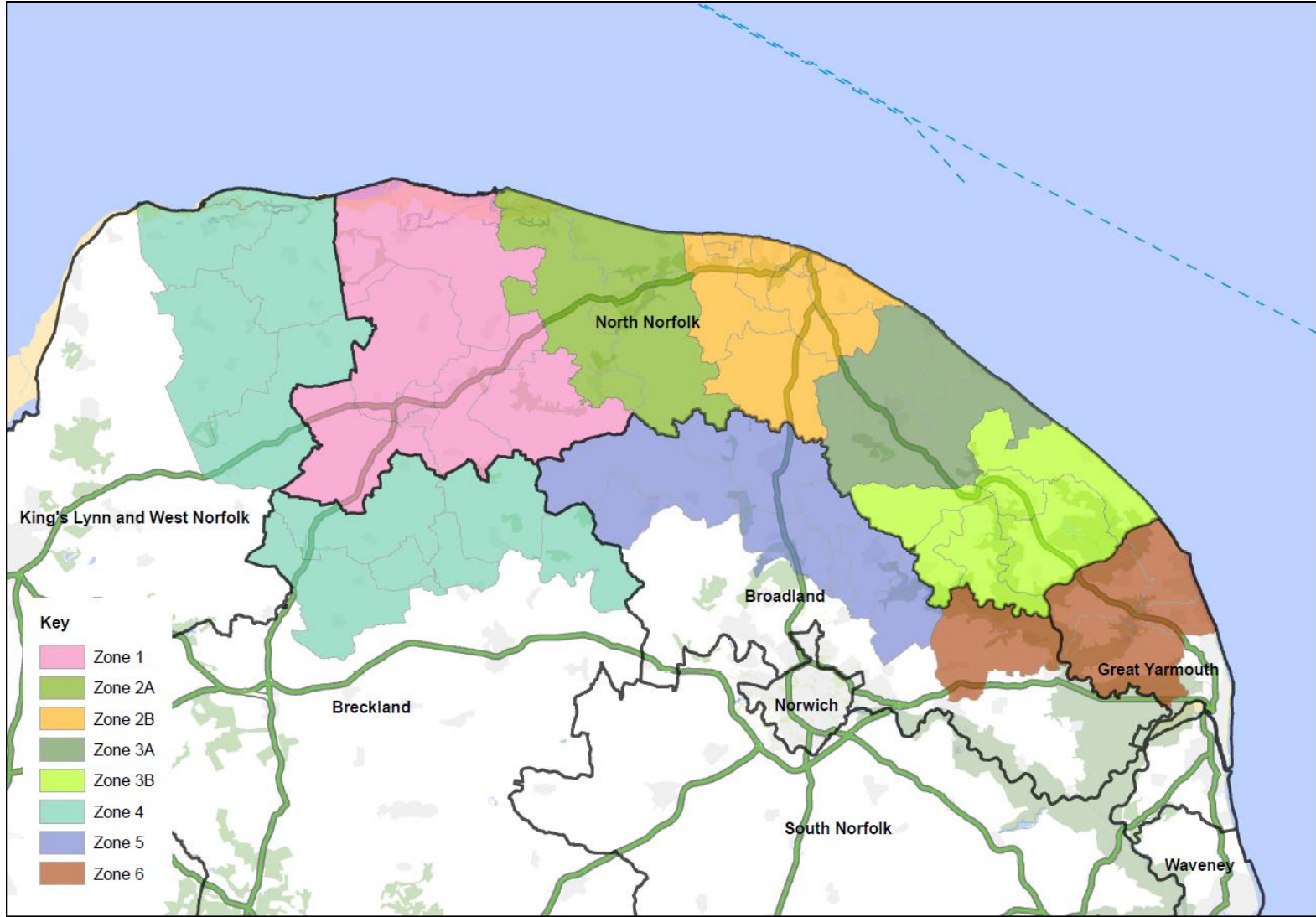
- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.47 These key inputs into the floorspace capacity assessment can be amended to provide revised capacity projections should the need arise or more up to date expenditure forecasts suggest this is necessary.

Appendix 1: Study Area

North Norfolk Study Area Zones

Zone	Ward
1	Astley Priory (North Norfolk) Walsingham Lancaster North Lancaster South Wensum (North Norfolk) The Raynhams
2	Glaven Valley High Heath Holt (North Norfolk) Briston Corpusty Chaucer (North Norfolk) Sheringham North Sheringham South Erpington The Runtons Cromer Town Suffield Park Poppyland Roughton (North Norfolk)
3	Gaunt Mundesley North Walsham North North Walsham East North Walsham West Happisburgh Worstead Scottow Waxham Stalham and Sutton Hoveton St Benet Waterside (North Norfolk)
4	Brancaster Burnham Docking Rudham Hermitage (Breckland) Launditch Tavener Upper Wensum Eynsford (Breckland)
5	Eynesford Reepham Aylsham Hevingham Buxton Coltishall Wroxham
6	Blofield with South Walsham West Flegg East Flegg Fleggburgh Ormesby (Great Yarmouth)



Appendix 2: Convenience Assessment

Table 1 Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	20,762	21,232	21,846	22,521	23,135	23,687
Zone 2A - Holt	12,509	12,792	13,162	13,569	13,939	14,271
Zone 2B - Sheringham/Cromer	26,466	27,066	27,848	28,708	29,491	30,195
Zone 3A - North Walsham	24,051	24,596	25,307	26,089	26,800	27,439
Zone 3B - Stalham/Hoveton	17,711	18,112	18,636	19,212	19,735	20,206
Zone 4 - Breckland/W. Norfolk	18,112	18,725	19,323	19,907	20,431	20,910
Zone 5 - Broadlands	26,611	27,059	27,742	28,510	29,236	29,897
Zone 6 - Great Yarmouth	22,256	22,622	23,057	23,560	24,017	24,475
Total	168,478	172,205	176,920	182,076	186,783	191,081
Tourism (staying/day trips)	n/a	26,800	26,800	26,800	26,800	26,800

Sources:

Experian 2011 Census of Population

Office of National Statistics 2014 SNPP projections

Economic Impact of Tourism : North Norfolk - 9.8 million tourist days - average additional 26,800 per day

Table 2 Convenience Goods Expenditure per person per annum (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	2,229	2,184	2,174	2,176	2,180
Zone 2A - Holt	2,313	2,266	2,257	2,258	2,263
Zone 2B - Sheringham/Cromer	2,181	2,137	2,127	2,129	2,133
Zone 3A - North Walsham	2,144	2,101	2,092	2,094	2,097
Zone 3B - Stalham/Hoveton	2,321	2,274	2,264	2,266	2,270
Zone 4 - Breckland/W. Norfolk	2,401	2,353	2,343	2,345	2,349
Zone 5 - Broadlands	2,159	2,116	2,107	2,108	2,112
Zone 6 - Great Yarmouth	2,234	2,189	2,180	2,182	2,186
Tourism	885	875	878	882	887

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: -1.1% 2014-2015, 0% 2015-2016, -0.2% 2016-2017, -0.9% 2017 to 2018, 0% p.a. from 2019 to 2023 and 0.1% from 2024

Excludes Special Forms of Trading

Economic Impact of Tourism: North Norfolk - average shopping spend = £9.70 per day of which 25% assumed for convenience goods

Table 3 **Total Convenience Goods Expenditure (£m)**

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	47.32	47.70	48.97	50.34	51.64
Zone 2A - Holt	29.59	29.83	30.62	31.48	32.29
Zone 2B - Sheringham/Cromer	59.02	59.50	61.07	62.79	64.41
Zone 3A - North Walsham	52.74	53.17	54.57	56.11	57.55
Zone 3B - Stalham/Hoveton	42.03	42.37	43.50	44.72	45.87
Zone 4 - Breckland/W. Norfolk	44.96	45.46	46.64	47.90	49.11
Zone 5 - Broadlands	58.43	58.70	60.07	61.64	63.15
Zone 6 - Great Yarmouth	50.54	50.48	51.36	52.39	53.49
Study Area Total	384.63	387.21	396.79	407.37	417.51
Tourism	23.72	23.46	23.53	23.65	23.76
Study Area Total	408.35	410.67	420.31	431.02	441.27

Source: Tables 1 and 2

Table 4 Base Year 2016 Convenience Goods Market Shares (%)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism
Cromer	0.2%	15.2%	51.7%	5.1%	0.7%	0.0%	3.5%	0.0%	15.0%
Fakenham	76.0%	25.7%	2.0%	0.0%	0.0%	25.4%	2.4%	0.0%	10.0%
Holt	0.5%	23.9%	0.0%	0.4%	0.0%	0.3%	1.6%	0.0%	8.0%
North Walsham	0.0%	2.0%	5.5%	78.8%	19.6%	0.0%	10.4%	0.0%	3.0%
Sheringham	0.2%	10.3%	28.4%	0.5%	0.0%	0.9%	0.0%	0.0%	18.0%
Hoveton/Wroxham	0.0%	0.0%	0.0%	0.1%	13.8%	0.0%	4.1%	0.0%	10.0%
Stalham	0.0%	0.0%	0.0%	4.9%	39.8%	0.0%	0.0%	2.0%	1.0%
Wells-next-to-the-Sea	6.1%	0.6%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	15.0%
Other North Norfolk District	8.7%	12.2%	2.8%	2.9%	4.5%	0.6%	0.5%	0.0%	20.0%
NNDC Total	91.7%	89.9%	90.4%	92.7%	78.4%	27.7%	22.5%	2.0%	100.0%
Aylesham	0.0%	3.0%	3.8%	1.3%	0.0%	0.0%	28.7%	0.3%	
Caister-on-Sea	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	29.6%	
Derham	5.6%	1.3%	0.0%	0.0%	0.0%	41.2%	1.3%	0.0%	
Great Yarmouth	0.0%	0.0%	0.0%	0.2%	6.5%	0.0%	0.0%	36.4%	
Kings Lynn	0.6%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	0.0%	
Norwich	1.3%	3.4%	1.2%	5.3%	11.2%	2.4%	37.4%	11.2%	
Swaffham	0.5%	0.7%	0.5%	0.2%	0.0%	4.3%	1.4%	0.0%	
Other Outside North Norfolk	0.3%	1.7%	4.1%	0.3%	1.6%	15.4%	8.7%	20.5%	
Other Sub-Total	8.3%	10.1%	9.6%	7.3%	21.6%	72.3%	77.5%	98.0%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey October 2016 (weighted results)

Economic Impact of Tourism: North Norfolk and NLP estimates

Table 5 Base Year 2016 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2016	47.32	29.59	59.02	52.74	42.03	44.96	58.43	50.54	23.72	408.35
Cromer	0.09	4.50	30.51	2.69	0.29	0.00	2.05	0.00	3.56	43.69
Fakenham	35.96	7.60	1.18	0.00	0.00	11.42	1.40	0.00	2.37	59.94
Holt	0.24	7.07	0.00	0.21	0.00	0.13	0.93	0.00	1.90	10.49
North Walsham	0.00	0.59	3.25	41.56	8.24	0.00	6.08	0.00	0.71	60.42
Sheringham	0.09	3.05	16.76	0.26	0.00	0.40	0.00	0.00	4.27	24.84
Hoveton/Wroxham	0.00	0.00	0.00	0.05	5.80	0.00	2.40	0.00	2.37	10.62
Stalham	0.00	0.00	0.00	2.58	16.73	0.00	0.00	1.01	0.24	20.56
Wells-next-to-the-Sea	2.89	0.18	0.00	0.00	0.00	0.22	0.00	0.00	3.56	6.85
Other North Norfolk District	4.12	3.61	1.65	1.53	1.89	0.27	0.29	0.00	4.74	18.11
North Norfolk Total	43.39	26.60	53.35	48.89	32.95	12.45	13.15	1.01	23.72	255.51
Aylesham	0.00	0.89	2.24	0.69	0.00	0.00	16.77	0.15		20.74
Caister-on-Sea	0.00	0.00	0.00	0.00	0.97	0.00	0.00	14.96		15.93
Derham	2.65	0.38	0.00	0.00	0.00	18.52	0.76	0.00		22.32
Great Yarmouth	0.00	0.00	0.00	0.11	2.73	0.00	0.00	18.40		21.24
Kings Lynn	0.28	0.00	0.00	0.00	0.00	4.05	0.00	0.00		4.33
Norwich	0.62	1.01	0.71	2.80	4.71	1.08	21.85	5.66		38.43
Swaffham	0.24	0.21	0.30	0.11	0.00	1.93	0.82	0.00		3.60
Other Outside North Norfolk	0.14	0.50	2.42	0.16	0.67	6.92	5.08	10.36		26.26
Other Sub-Total	3.93	2.99	5.67	3.85	9.08	32.51	45.29	49.53		152.84
TOTAL	47.32	29.59	59.02	52.74	42.03	44.96	58.43	50.54		408.35

Source: Table 3 and 4

Table 6 Future Convenience Goods Market Shares 2021 onwards (%)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism
Cromer	0.2%	12.0%	51.7%	5.1%	0.7%	0.0%	3.5%	0.0%	15.0%
Fakenham	74.6%	20.0%	2.0%	0.0%	0.0%	25.4%	2.4%	0.0%	10.0%
Holt	2.0%	40.0%	0.0%	2.0%	0.0%	1.0%	2.0%	0.0%	8.0%
North Walsham	0.0%	1.6%	5.5%	77.2%	19.6%	0.0%	10.3%	0.0%	3.0%
Sheringham	0.2%	8.1%	28.4%	0.5%	0.0%	0.9%	0.0%	0.0%	18.0%
Hoveton/Wroxham	0.0%	0.0%	0.0%	0.1%	13.8%	0.0%	4.1%	0.0%	10.0%
Stalham	0.0%	0.0%	0.0%	4.9%	39.8%	0.0%	0.0%	2.0%	1.0%
Wells-next-to-the-Sea	6.1%	0.5%	0.0%	0.0%	0.0%	0.5%	0.0%	0.0%	15.0%
Other North Norfolk District	8.7%	9.8%	2.8%	2.9%	4.5%	0.6%	0.5%	0.0%	20.0%
NNDC Total	91.8%	92.0%	90.4%	92.7%	78.4%	28.4%	22.8%	2.0%	100.0%
Aylesham	0.0%	2.4%	3.8%	1.3%	0.0%	0.0%	28.6%	0.3%	
Caister-on-Sea	0.0%	0.0%	0.0%	0.0%	2.3%	0.0%	0.0%	29.6%	
Dereham	5.5%	1.0%	0.0%	0.0%	0.0%	40.5%	1.3%	0.0%	
Great Yarmouth	0.0%	0.0%	0.0%	0.2%	6.5%	0.0%	0.0%	36.4%	
Kings Lynn	0.6%	0.0%	0.0%	0.0%	0.0%	9.0%	0.0%	0.0%	
Norwich	1.3%	2.7%	1.2%	5.3%	11.2%	2.4%	37.3%	11.2%	
Swaffham	0.5%	0.6%	0.5%	0.2%	0.0%	4.3%	1.4%	0.0%	
Other Outside North Norfolk	0.3%	1.3%	4.1%	0.3%	1.6%	15.4%	8.6%	20.5%	
Other Sub-Total	8.2%	8.0%	9.6%	7.3%	21.6%	71.6%	77.2%	98.0%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey October 2016 (weighted results)

Economic Impact of Tourism: North Norfolk and NLP estimates

Table 7 Future 2021 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2021	47.70	29.83	59.50	53.17	42.37	45.46	58.70	50.48	23.46	410.67
Cromer	0.10	3.58	30.76	2.71	0.30	0.00	2.05	0.00	3.52	43.02
Fakenham	35.59	5.97	1.19	0.00	0.00	11.55	1.41	0.00	2.35	58.04
Holt	0.95	11.93	0.00	1.06	0.00	0.45	1.17	0.00	1.88	17.45
North Walsham	0.00	0.48	3.27	41.04	8.31	0.00	6.05	0.00	0.70	59.85
Sheringham	0.10	2.42	16.90	0.27	0.00	0.41	0.00	0.00	4.22	24.31
Hoveton/Wroxham	0.00	0.00	0.00	0.05	5.85	0.00	2.41	0.00	2.35	10.65
Stalham	0.00	0.00	0.00	2.61	16.87	0.00	0.00	1.01	0.23	20.71
Wells-next-to-the-Sea	2.91	0.15	0.00	0.00	0.00	0.23	0.00	0.00	3.52	6.80
Other North Norfolk District	4.15	2.92	1.67	1.54	1.91	0.27	0.29	0.00	4.69	17.45
North Norfolk Total	43.79	27.44	53.79	49.29	33.22	12.91	13.38	1.01	23.46	258.29
Aylesham	0.00	0.72	2.26	0.69	0.00	0.00	16.79	0.15		20.61
Caister-on-Sea	0.00	0.00	0.00	0.00	0.97	0.00	0.00	14.94		15.92
Derham	2.62	0.30	0.00	0.00	0.00	18.41	0.76	0.00		22.10
Great Yarmouth	0.00	0.00	0.00	0.11	2.75	0.00	0.00	18.37		21.23
Kings Lynn	0.29	0.00	0.00	0.00	0.00	4.09	0.00	0.00		4.38
Norwich	0.62	0.81	0.71	2.82	4.75	1.09	21.90	5.65		38.34
Swaffham	0.24	0.18	0.30	0.11	0.00	1.95	0.82	0.00		3.60
Other Outside North Norfolk	0.14	0.39	2.44	0.16	0.68	7.00	5.05	10.35		26.20
Other Sub-Total	3.91	2.39	5.71	3.88	9.15	32.55	45.32	49.47		152.38
TOTAL	47.70	29.83	59.50	53.17	42.37	45.46	58.70	50.48		410.67

Source: Table 3 and 6

Table 8 Future 2026 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2026	48.97	30.62	61.07	54.57	43.50	46.64	60.07	51.36	23.53	420.31
Cromer	0.10	3.67	31.58	2.78	0.30	0.00	2.10	0.00	3.53	44.07
Fakenham	36.53	6.12	1.22	0.00	0.00	11.85	1.44	0.00	2.35	59.51
Holt	0.98	12.25	0.00	1.09	0.00	0.47	1.20	0.00	1.88	17.87
North Walsham	0.00	0.49	3.36	42.13	8.53	0.00	6.19	0.00	0.71	61.40
Sheringham	0.10	2.48	17.35	0.27	0.00	0.42	0.00	0.00	4.24	24.85
Hoveton/Wroxham	0.00	0.00	0.00	0.05	6.00	0.00	2.46	0.00	2.35	10.87
Stalham	0.00	0.00	0.00	2.67	17.31	0.00	0.00	1.03	0.24	21.25
Wells-next-to-the-Sea	2.99	0.15	0.00	0.00	0.00	0.23	0.00	0.00	3.53	6.90
Other North Norfolk District	4.26	3.00	1.71	1.58	1.96	0.28	0.30	0.00	4.71	17.80
North Norfolk Total	44.95	28.17	55.21	50.59	34.10	13.24	13.70	1.03	23.53	264.52
Aylesham	0.00	0.73	2.32	0.71	0.00	0.00	17.18	0.15		21.10
Caister-on-Sea	0.00	0.00	0.00	0.00	1.00	0.00	0.00	15.20		16.20
Derham	2.69	0.31	0.00	0.00	0.00	18.89	0.78	0.00		22.67
Great Yarmouth	0.00	0.00	0.00	0.11	2.83	0.00	0.00	18.69		21.63
Kings Lynn	0.29	0.00	0.00	0.00	0.00	4.20	0.00	0.00		4.49
Norwich	0.64	0.83	0.73	2.89	4.87	1.12	22.40	5.75		39.24
Swaffham	0.24	0.18	0.31	0.11	0.00	2.01	0.84	0.00		3.69
Other Outside North Norfolk	0.15	0.40	2.50	0.16	0.70	7.18	5.17	10.53		26.78
Other Sub-Total	4.02	2.45	5.86	3.98	9.40	33.39	46.37	50.33		155.80
TOTAL	48.97	30.62	61.07	54.57	43.50	46.64	60.07	51.36		420.31

Source: Table 3 and 6

Table 9 Future 2031 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2031	50.34	31.48	62.79	56.11	44.72	47.90	61.64	52.39	23.65	431.02
Cromer	0.10	3.78	32.46	2.86	0.31	0.00	2.16	0.00	3.55	45.22
Fakenham	37.55	6.30	1.26	0.00	0.00	12.17	1.48	0.00	2.36	61.12
Holt	1.01	12.59	0.00	1.12	0.00	0.48	1.23	0.00	1.89	18.32
North Walsham	0.00	0.50	3.45	43.31	8.76	0.00	6.35	0.00	0.71	63.09
Sheringham	0.10	2.55	17.83	0.28	0.00	0.43	0.00	0.00	4.26	25.45
Hoveton/Wroxham	0.00	0.00	0.00	0.06	6.17	0.00	2.53	0.00	2.36	11.12
Stalham	0.00	0.00	0.00	2.75	17.80	0.00	0.00	1.05	0.24	21.83
Wells-next-to-the-Sea	3.07	0.16	0.00	0.00	0.00	0.24	0.00	0.00	3.55	7.01
Other North Norfolk District	4.38	3.08	1.76	1.63	2.01	0.29	0.31	0.00	4.73	18.19
North Norfolk Total	46.21	28.96	56.76	52.01	35.06	13.60	14.05	1.05	23.65	271.35
Aylesham	0.00	0.76	2.39	0.73	0.00	0.00	17.63	0.16		21.66
Caister-on-Sea	0.00	0.00	0.00	0.00	1.03	0.00	0.00	15.51		16.54
Derham	2.77	0.31	0.00	0.00	0.00	19.40	0.80	0.00		23.29
Great Yarmouth	0.00	0.00	0.00	0.11	2.91	0.00	0.00	19.07		22.09
Kings Lynn	0.30	0.00	0.00	0.00	0.00	4.31	0.00	0.00		4.61
Norwich	0.65	0.85	0.75	2.97	5.01	1.15	22.99	5.87		40.25
Swaffham	0.25	0.19	0.31	0.11	0.00	2.06	0.86	0.00		3.79
Other Outside North Norfolk	0.15	0.41	2.57	0.17	0.72	7.38	5.30	10.74		27.44
Other Sub-Total	4.13	2.52	6.03	4.10	9.66	34.30	47.59	51.35		159.66
TOTAL	50.34	31.48	62.79	56.11	44.72	47.90	61.64	52.39		431.02

Source: Table 3 and 6

Table 10 Future 2036 Convenience Goods Expenditure (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2036	51.64	32.29	64.41	57.55	45.87	49.11	63.15	53.49	23.76	441.27
Cromer	0.10	3.87	33.30	2.94	0.32	0.00	2.21	0.00	3.56	46.31
Fakenham	38.52	6.46	1.29	0.00	0.00	12.47	1.52	0.00	2.38	62.63
Holt	1.03	12.92	0.00	1.15	0.00	0.49	1.26	0.00	1.90	18.75
North Walsham	0.00	0.52	3.54	44.43	8.99	0.00	6.50	0.00	0.71	64.70
Sheringham	0.10	2.62	18.29	0.29	0.00	0.44	0.00	0.00	4.28	26.02
Hoveton/Wroxham	0.00	0.00	0.00	0.06	6.33	0.00	2.59	0.00	2.38	11.35
Stalham	0.00	0.00	0.00	2.82	18.26	0.00	0.00	1.07	0.24	22.38
Wells-next-to-the-Sea	3.15	0.16	0.00	0.00	0.00	0.25	0.00	0.00	3.56	7.12
Other North Norfolk District	4.49	3.16	1.80	1.67	2.06	0.29	0.32	0.00	4.75	18.56
North Norfolk Total	47.40	29.71	58.22	53.35	35.96	13.95	14.40	1.07	23.76	277.82
Aylesham	0.00	0.77	2.45	0.75	0.00	0.00	18.06	0.16		22.19
Caister-on-Sea	0.00	0.00	0.00	0.00	1.05	0.00	0.00	15.83		16.89
Derham	2.84	0.32	0.00	0.00	0.00	19.89	0.82	0.00		23.87
Great Yarmouth	0.00	0.00	0.00	0.12	2.98	0.00	0.00	19.47		22.57
Kings Lynn	0.31	0.00	0.00	0.00	0.00	4.42	0.00	0.00		4.73
Norwich	0.67	0.87	0.77	3.05	5.14	1.18	23.56	5.99		41.23
Swaffham	0.26	0.19	0.32	0.12	0.00	2.11	0.88	0.00		3.89
Other Outside North Norfolk	0.15	0.42	2.64	0.17	0.73	7.56	5.43	10.97		28.08
Other Sub-Total	4.23	2.58	6.18	4.20	9.91	35.17	48.75	52.42		163.45
TOTAL	51.64	32.29	64.41	57.55	45.87	49.11	63.15	53.49		441.27

Source: Table 3 and 6

Table 11 Convenience Goods Floorspace and Benchmark Turnover 2016

Area	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover (£ per sq.m)	Total Turnover (£m)
Cromer	Budgens	746	90%	671	£8,000	£5.37
	Iceland	446	98%	437	£8,045	£3.52
	Lidl	1,030	85%	876	£7,723	£6.76
	Morrisons	2,526	85%	2,147	£10,849	£23.29
	Co-op	1,087	90%	978	£8,903	£8.71
	Other Cromer	430	100%	430	£5,000	£2.15
	Sub Total	6,265		5,539		£49.80
Fakenham	Aldi	1,051	85%	893	£11,557	£10.32
	Lidl	970	85%	825	£7,723	£6.37
	Morrisons	2,656	85%	2,258	£10,849	£24.49
	Tesco	2,033	85%	1,728	£11,058	£19.11
	Other Fakenham	820	100%	820	£5,000	£4.10
	Sub-Total	7,530		6,524		£64.39
Holt	Budgens	1,033	90%	930	£8,000	£7.44
	Other Holt	580	100%	580	£5,000	£2.90
	Sub-Total	1,613		1,510		£10.34
North Walsham	Lidl	1,373	85%	1,167	£7,723	£9.01
	Sainsburys	3,006	75%	2,255	£11,690	£26.36
	Waitrose	1,507	90%	1,356	£11,665	£15.82
	Other North Walsham	310	100%	310	£5,000	£1.55
	Sub Total	6,196		5,088		£52.74
Sheringham	Sainsbury's Local	222	95%	211	£11,557	£2.44
	Tesco	1,355	90%	1,220	£11,058	£13.49
	Other Sheringham	880	100%	880	£5,000	£4.40
	Sub-Total	2,457		2,310		£20.32
Hoveton/Wroxham	Roys of Wroxham	4,708	30%	1,412	£8,000	£11.30
	Other Hoveton	280	100%	280	£5,000	£1.40
	Sub-Total	4,988		1,692		£12.70
Stalham	Tesco	1,689	90%	1,520	£11,058	£16.81
	Other Stalham	390	100%	390	£5,000	£1.95
	Sub Total	2,079		1,910		£18.76
Wells-next-to-the-Sea	Co-op	614	90%	553	£8,903	£4.92
	Other Well-n-Sea	380	100%	380	£5,000	£1.90
	Sub Total	994		933		£6.82
TOTAL		32,122		25,506		£235.87

Source: NLP Land Use Survey 2016 and ORC StorePoint 2016 and Mintel 2015

Table 12 **Summary of Convenience Goods Expenditure 2016 to 2036 (£M)**

Area	2016	2021	2026	2031	2036
Available Expenditure					
Cromer	43.69	43.02	44.07	45.22	46.31
Fakenham	59.94	58.04	59.51	61.12	62.63
Holt	10.49	17.45	17.87	18.32	18.75
North Walsham	60.42	59.85	61.40	63.09	64.70
Sheringham	24.84	24.31	24.85	25.45	26.02
Hoveton/Wroxham	10.62	10.65	10.87	11.12	11.35
Stalham	20.56	20.71	21.25	21.83	22.38
Wells-next-to-the-Sea	6.85	6.80	6.90	7.01	7.12
Other North Norfolk District	18.11	17.45	17.80	18.19	18.56
Total	255.51	258.29	264.52	271.35	277.82
Benchmark Turnover of Existing Facilities					
Cromer	49.80	49.80	49.80	49.80	49.80
Fakenham	64.39	64.39	64.39	64.39	64.39
Holt (1)	10.34	20.88	20.88	20.88	20.88
North Walsham	52.74	52.74	52.74	52.74	52.74
Sheringham	20.32	20.32	20.32	20.32	20.32
Hoveton/Wroxham	12.70	12.70	12.70	12.70	12.70
Stalham	18.76	18.76	18.76	18.76	18.76
Wells-next-to-the-Sea	6.82	6.82	6.82	6.82	6.82
Other North Norfolk District	18.11	18.11	18.11	18.11	18.11
Total	253.98	264.52	264.52	264.52	264.52

Source: Tables 5 to 11

(1) including Aldi commitment at 2021 - 912 sq.m convenience sales at £11,557 p.s.m

Table 13 Convenience Goods Floorspace Capacity up to 2036

	Area	2021	2026	2031	2036
Surplus/Deficit Expenditure (£m)	Cromer	-6.78	-5.74	-4.58	-3.50
	Fakenham	-6.35	-4.88	-3.28	-1.76
	Holt	-3.42	-3.01	-2.55	-2.12
	North Walsham	7.11	8.66	10.35	11.96
	Sheringham	3.98	4.53	5.13	5.69
	Hoveton/Wroxham	-2.05	-1.83	-1.58	-1.35
	Stalham	1.96	2.49	3.07	3.62
	Wells-next-to-the-Sea	-0.01	0.08	0.19	0.30
	Other North Norfolk District	-0.66	-0.31	0.08	0.45
	Total		-6.23	0.00	6.83
Turnover Density New Floorspace (£ per sq.m)		£11,000	£11,000	£11,000	£11,000
Floorspace Projection (sq.m net)	Cromer	-617	-521	-417	-318
	Fakenham	-577	-444	-298	-160
	Holt	-311	-274	-232	-193
	North Walsham	646	787	941	1,087
	Sheringham	362	412	466	518
	Hoveton/Wroxham	-186	-166	-144	-122
	Stalham	178	226	279	329
	Wells-next-to-the-Sea	-1	8	18	27
	Other North Norfolk District	-60	-28	7	41
	Total		-566	0	621
Floorspace Projection (sq.m gross)	Cromer	-881	-745	-595	-454
	Fakenham	-825	-634	-426	-229
	Holt	-445	-391	-332	-276
	North Walsham	923	1,124	1,345	1,553
	Sheringham	517	588	666	740
	Hoveton/Wroxham	-266	-237	-205	-175
	Stalham	254	323	399	471
	Wells-next-to-the-Sea	-2	11	25	39
	Other North Norfolk District	-86	-40	11	59
	Total		-809	0	888

Appendix 3: Comparison Assessment

Table 1 Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	20,762	21,232	21,846	22,521	23,135	23,687
Zone 2A - Holt	12,509	12,792	13,162	13,569	13,939	14,271
Zone 2B - Sheringham/Cromer	26,466	27,066	27,848	28,708	29,491	30,195
Zone 3A - North Walsham	24,051	24,596	25,307	26,089	26,800	27,439
Zone 3B - Stalham/Hoveton	17,711	18,112	18,636	19,212	19,735	20,206
Zone 4 - Breckland/W. Norfolk	18,112	18,725	19,323	19,907	20,431	20,910
Zone 5 - Broadlands	26,611	27,059	27,742	28,510	29,236	29,897
Zone 6 - Great Yarmouth	22,256	22,622	23,057	23,560	24,017	24,475
Study Area Total	168,478	172,205	176,920	182,076	186,783	191,081
Tourism (staying/day trips)	n/a	26,800	26,800	26,800	26,800	26,800

Sources:

Experian 2011 Census of Population

Office of National Statistics 2014 SNPP projections

Economic Impact of Tourism : North Norfolk - 9.8 million tourist days - average additional 26,800

Table 2 Comparison Goods Expenditure per person (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	3,070	3,340	3,872	4,522	5,280
Zone 2A - Holt	3,361	3,658	4,240	4,951	5,782
Zone 2B - Sheringham/Cromer	3,069	3,339	3,871	4,520	5,279
Zone 3A - North Walsham	2,967	3,228	3,742	4,370	5,103
Zone 3B - Stalham/Hoveton	3,324	3,617	4,192	4,896	5,717
Zone 4 - Breckland/W. Norfolk	3,591	3,908	4,530	5,290	6,177
Zone 5 - Broadlands	3,314	3,606	4,179	4,881	5,700
Zone 6 - Great Yarmouth	3,293	3,583	4,153	4,850	5,664
Tourism	2,655	2,971	3,465	4,016	4,656

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: 4.6% 2014-2015, 3.3% 2015-2016, 1.4% 2016-2017, 1% 2017 to 2018, 3% p.a. from 2019 to 2023 and 3.2% from 2024

Excludes Special Forms of Trading

Economic Impact of Tourism: North Norfolk - average shopping spend = £9.70 per day of which 75% assumed for comparison goods

Table 3 **Total Comparison Goods Expenditure (£m)**

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	65.18	72.97	87.20	104.60	125.07
Zone 2A - Holt	43.00	48.14	57.53	69.01	82.52
Zone 2B - Sheringham/Cromer	83.06	92.99	111.12	133.30	159.38
Zone 3A - North Walsham	72.97	81.69	97.62	117.10	140.02
Zone 3B - Stalham/Hoveton	60.20	67.40	80.54	96.62	115.53
Zone 4 - Breckland/W. Norfolk	67.25	75.51	90.17	108.07	129.16
Zone 5 - Broadlands	89.66	100.03	119.16	142.69	170.40
Zone 6 - Great Yarmouth	74.49	82.62	97.85	116.49	138.63
Study Area Total	555.81	621.36	741.20	887.90	1,060.70
Tourism	71.15	79.63	92.85	107.64	124.78
Total	626.96	700.99	834.05	995.54	1,185.49

Source: Tables 1 and 2

Table 4 Base Year 2016 Comparison Goods Market Shares (%)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism
Cromer	1.2%	9.8%	37.8%	10.3%	1.6%	0.2%	2.2%	0.0%	15.0%
Fakenham	39.5%	11.1%	1.8%	0.0%	0.2%	14.7%	0.8%	0.0%	10.0%
Holt	6.6%	21.2%	2.4%	0.7%	0.3%	0.4%	2.1%	0.1%	20.0%
North Walsham	0.0%	0.5%	0.6%	28.2%	2.9%	0.0%	2.7%	0.0%	1.0%
Sheringham	1.0%	4.1%	11.9%	0.5%	0.1%	1.8%	0.5%	0.0%	13.0%
Hoveton/Wroxham	0.0%	0.0%	0.3%	1.4%	7.6%	0.0%	2.2%	0.7%	15.0%
Stalham	0.0%	0.4%	0.0%	1.6%	7.2%	0.0%	0.0%	0.2%	1.0%
Wells-next-to-the-Sea	1.5%	0.0%	0.0%	0.0%	0.3%	0.2%	0.0%	0.0%	5.0%
Other North Norfolk District	0.0%	0.3%	0.3%	0.2%	0.8%	0.0%	0.0%	1.8%	20.0%
NNDC Total	49.8%	47.4%	55.1%	42.9%	21.0%	17.3%	10.5%	2.8%	100.0%
Aylesham	0.0%	1.0%	1.1%	0.2%	0.0%	0.0%	10.6%	0.0%	
Dereham	3.1%	6.0%	0.0%	0.1%	0.0%	21.5%	0.9%	0.0%	
Great Yarmouth	0.0%	0.0%	0.3%	0.5%	13.7%	0.0%	0.1%	53.5%	
Kings Lynn	13.5%	1.0%	0.7%	0.2%	0.1%	18.2%	0.0%	0.0%	
Norwich	31.9%	41.6%	39.7%	55.2%	61.8%	33.6%	73.7%	38.1%	
Swaffham	0.0%	0.0%	0.0%	0.0%	0.0%	0.8%	0.0%	0.0%	
Other Outside North Norfolk	1.7%	3.0%	3.1%	0.9%	3.4%	8.6%	4.2%	5.6%	
Other Sub-Total	50.2%	52.6%	44.9%	57.1%	79.0%	82.7%	89.5%	97.2%	
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	

Source: NEMS Household Survey October 2016 (weighted results)

Table 5 Base Year 2016 Comparison Goods Expenditure Patterns (£m)

Centre/Facility	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2016	65.18	43.00	83.06	72.97	60.20	67.25	89.66	74.49	71.15	626.96
Cromer	0.78	4.21	31.40	7.52	0.96	0.13	1.97	0.00	10.67	57.65
Fakenham	25.75	4.77	1.50	0.00	0.12	9.89	0.72	0.00	7.12	49.85
Holt	4.30	9.12	1.99	0.51	0.18	0.27	1.88	0.07	14.23	32.56
North Walsham	0.00	0.22	0.50	20.58	1.75	0.00	2.42	0.00	0.71	26.17
Sheringham	0.65	1.76	9.88	0.36	0.06	1.21	0.45	0.00	9.25	23.63
Hoveton/Wroxham	0.00	0.00	0.25	1.02	4.58	0.00	1.97	0.52	10.67	19.01
Stalham	0.00	0.17	0.00	1.17	4.33	0.00	0.00	0.15	0.71	6.53
Wells-next-to-the-Sea	0.98	0.00	0.00	0.00	0.18	0.13	0.00	0.00	3.56	4.85
Other North Norfolk District	0.00	0.13	0.25	0.15	0.48	0.00	0.00	1.34	14.23	16.58
North Norfolk Total	32.46	20.38	45.77	31.30	12.64	11.63	9.41	2.09	71.15	236.84
Aylesham	0.00	0.43	0.91	0.15	0.00	0.00	9.50	0.00		10.99
Dereham	2.02	2.58	0.00	0.07	0.00	14.46	0.81	0.00		19.94
Great Yarmouth	0.00	0.00	0.25	0.36	8.25	0.00	0.09	39.85		48.81
Kings Lynn	8.80	0.43	0.58	0.15	0.06	12.24	0.00	0.00		22.26
Norwich	20.79	17.89	32.97	40.28	37.21	22.59	66.08	28.38		266.19
Swaffham	0.00	0.00	0.00	0.00	0.00	0.54	0.00	0.00		0.54
Other Outside North Norfolk	1.11	1.29	2.57	0.66	2.05	5.78	3.77	4.17		21.40
Other Sub-Total	32.72	22.62	37.29	41.66	47.56	55.61	80.25	72.41		390.12
TOTAL	65.18	43.00	83.06	72.97	60.20	67.25	89.66	74.49		626.96

Source: Table 3 and 4

Table 6 Future 2021 Comparison Goods Expenditure Patterns (£m)

Centre/Facility	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Toursim	Total
Expenditure 2021	72.97	48.14	92.99	81.69	67.40	75.51	100.03	82.62	79.63	700.99
Cromer	0.88	4.72	35.15	8.41	1.08	0.15	2.20	0.00	11.94	64.53
Fakenham	28.82	5.34	1.67	0.00	0.13	11.10	0.80	0.00	7.96	55.84
Holt	4.82	10.21	2.23	0.57	0.20	0.30	2.10	0.08	15.93	36.44
North Walsham	0.00	0.24	0.56	23.04	1.95	0.00	2.70	0.00	0.80	29.29
Sheringham	0.73	1.97	11.07	0.41	0.07	1.36	0.50	0.00	10.35	26.46
Hoveton/Wroxham	0.00	0.00	0.28	1.14	5.12	0.00	2.20	0.58	11.94	21.27
Stalham	0.00	0.19	0.00	1.31	4.85	0.00	0.00	0.17	0.80	7.31
Wells-next-to-the-Sea	1.09	0.00	0.00	0.00	0.20	0.15	0.00	0.00	3.98	5.43
Other North Norfolk District	0.00	0.14	0.28	0.16	0.54	0.00	0.00	1.49	15.93	18.54
North Norfolk Total	36.34	22.82	51.24	35.05	14.15	13.06	10.50	2.31	79.63	265.11
Aylesham	0.00	0.48	1.02	0.16	0.00	0.00	10.60	0.00		12.27
Dereham	2.26	2.89	0.00	0.08	0.00	16.23	0.90	0.00		22.37
Great Yarmouth	0.00	0.00	0.28	0.41	9.23	0.00	0.10	44.20		54.22
Kings Lynn	9.85	0.48	0.65	0.16	0.07	13.74	0.00	0.00		24.96
Norwich	23.28	20.03	36.92	45.09	41.66	25.37	73.72	31.48		297.54
Swaffham	0.00	0.00	0.00	0.00	0.00	0.60	0.00	0.00		0.60
Other Outside North Norfolk	1.24	1.44	2.88	0.74	2.29	6.49	4.20	4.63		23.92
Other Sub-Total	36.63	25.32	41.75	46.65	53.25	62.45	89.53	80.30		435.88
TOTAL	72.97	48.14	92.99	81.69	67.40	75.51	100.03	82.62		700.99

Source: Table 3 and 4

Table 7 Future 2026 Comparison Goods Expenditure Patterns (£m)

Centre/Facility	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Toursim	Total
Expenditure 2026	87.20	57.53	111.12	97.62	80.54	90.17	119.16	97.85	92.85	834.05
Cromer	1.05	5.64	42.00	10.05	1.29	0.18	2.62	0.00	13.93	76.76
Fakenham	34.44	6.39	2.00	0.00	0.16	13.26	0.95	0.00	9.29	66.48
Holt	5.76	12.20	2.67	0.68	0.24	0.36	2.50	0.10	18.57	43.07
North Walsham	0.00	0.29	0.67	27.53	2.34	0.00	3.22	0.00	0.93	34.96
Sheringham	0.87	2.36	13.22	0.49	0.08	1.62	0.60	0.00	12.07	31.31
Hoveton/Wroxham	0.00	0.00	0.33	1.37	6.12	0.00	2.62	0.68	13.93	25.06
Stalham	0.00	0.23	0.00	1.56	5.80	0.00	0.00	0.20	0.93	8.72
Wells-next-to-the-Sea	1.31	0.00	0.00	0.00	0.24	0.18	0.00	0.00	4.64	6.37
Other North Norfolk District	0.00	0.17	0.33	0.20	0.64	0.00	0.00	1.76	18.57	21.68
North Norfolk Total	43.43	27.27	61.23	41.88	16.91	15.60	12.51	2.74	92.85	314.42
Aylesham	0.00	0.58	1.22	0.20	0.00	0.00	12.63	0.00		14.62
Dereham	2.70	3.45	0.00	0.10	0.00	19.39	1.07	0.00		26.71
Great Yarmouth	0.00	0.00	0.33	0.49	11.03	0.00	0.12	52.35		64.33
Kings Lynn	11.77	0.58	0.78	0.20	0.08	16.41	0.00	0.00		29.81
Norwich	27.82	23.93	44.12	53.89	49.78	30.30	87.82	37.28		354.93
Swaffham	0.00	0.00	0.00	0.00	0.00	0.72	0.00	0.00		0.72
Other Outside North Norfolk	1.48	1.73	3.44	0.88	2.74	7.75	5.00	5.48		28.51
Other Sub-Total	43.77	30.26	49.89	55.74	63.63	74.57	106.65	95.11		519.63
TOTAL	87.20	57.53	111.12	97.62	80.54	90.17	119.16	97.85		834.05

Source: Table 3 and 4

Table 8 Future 2031 Comparison Goods Expenditure Patterns (£m)

Centre/Facility	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Toursim	Total
Expenditure 2031	104.60	69.01	133.30	117.10	96.62	108.07	142.69	116.49	107.64	995.54
Cromer	1.26	6.76	50.39	12.06	1.55	0.22	3.14	0.00	16.15	91.52
Fakenham	41.32	7.66	2.40	0.00	0.19	15.89	1.14	0.00	10.76	79.36
Holt	6.90	14.63	3.20	0.82	0.29	0.43	3.00	0.12	21.53	50.92
North Walsham	0.00	0.35	0.80	33.02	2.80	0.00	3.85	0.00	1.08	41.90
Sheringham	1.05	2.83	15.86	0.59	0.10	1.95	0.71	0.00	13.99	37.07
Hoveton/Wroxham	0.00	0.00	0.40	1.64	7.34	0.00	3.14	0.82	16.15	29.48
Stalham	0.00	0.28	0.00	1.87	6.96	0.00	0.00	0.23	1.08	10.42
Wells-next-to-the-Sea	1.57	0.00	0.00	0.00	0.29	0.22	0.00	0.00	5.38	7.46
Other North Norfolk District	0.00	0.21	0.40	0.23	0.77	0.00	0.00	2.10	21.53	25.24
North Norfolk Total	52.09	32.71	73.45	50.24	20.29	18.70	14.98	3.26	107.64	373.36
Aylesham	0.00	0.69	1.47	0.23	0.00	0.00	15.13	0.00		17.52
Dereham	3.24	4.14	0.00	0.12	0.00	23.24	1.28	0.00		32.02
Great Yarmouth	0.00	0.00	0.40	0.59	13.24	0.00	0.14	62.32		76.69
Kings Lynn	14.12	0.69	0.93	0.23	0.10	19.67	0.00	0.00		35.75
Norwich	33.37	28.71	52.92	64.64	59.71	36.31	105.16	44.38		425.21
Swaffham	0.00	0.00	0.00	0.00	0.00	0.86	0.00	0.00		0.86
Other Outside North Norfolk	1.78	2.07	4.13	1.05	3.29	9.29	5.99	6.52		34.13
Other Sub-Total	52.51	36.30	59.85	66.87	76.33	89.38	127.71	113.23		622.18
TOTAL	104.60	69.01	133.30	117.10	96.62	108.07	142.69	116.49		995.54

Source: Table 3 and 4

Table 9 Future 2036 Comparison Goods Expenditure Patterns (£m)

Centre/Facility	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2036	125.07	82.52	159.38	140.02	115.53	129.16	170.40	138.63	124.78	1185.49
Cromer	1.50	8.09	60.25	14.42	1.85	0.26	3.75	0.00	18.72	108.83
Fakenham	49.40	9.16	2.87	0.00	0.23	18.99	1.36	0.00	12.48	94.49
Holt	8.25	17.49	3.83	0.98	0.35	0.52	3.58	0.14	24.96	60.09
North Walsham	0.00	0.41	0.96	39.48	3.35	0.00	4.60	0.00	1.25	50.05
Sheringham	1.25	3.38	18.97	0.70	0.12	2.32	0.85	0.00	16.22	43.81
Hoveton/Wroxham	0.00	0.00	0.48	1.96	8.78	0.00	3.75	0.97	18.72	34.66
Stalham	0.00	0.33	0.00	2.24	8.32	0.00	0.00	0.28	1.25	12.41
Wells-next-to-the-Sea	1.88	0.00	0.00	0.00	0.35	0.26	0.00	0.00	6.24	8.72
Other North Norfolk District	0.00	0.25	0.48	0.28	0.92	0.00	0.00	2.50	24.96	29.38
North Norfolk Total	62.29	39.11	87.82	60.07	24.26	22.35	17.89	3.88	124.78	442.45
Aylesham	0.00	0.83	1.75	0.28	0.00	0.00	18.06	0.00		20.92
Dereham	3.88	4.95	0.00	0.14	0.00	27.77	1.53	0.00		38.27
Great Yarmouth	0.00	0.00	0.48	0.70	15.83	0.00	0.17	74.17		91.34
Kings Lynn	16.88	0.83	1.12	0.28	0.12	23.51	0.00	0.00		42.73
Norwich	39.90	34.33	63.28	77.29	71.39	43.40	125.59	52.82		507.98
Swaffham	0.00	0.00	0.00	0.00	0.00	1.03	0.00	0.00		1.03
Other Outside North Norfolk	2.13	2.48	4.94	1.26	3.93	11.11	7.16	7.76		40.76
Other Sub-Total	62.79	43.40	71.56	79.95	91.27	106.82	152.51	134.75		743.04
TOTAL	125.07	82.52	159.38	140.02	115.53	129.16	170.40	138.63		1,185.49

Source: Table 3 and 4

Table 10 Comparison Goods Floorspace 2016

Town		Sales Floorspace (sq.m net)
Cromer	Town Centre	3,850
	Comparsion sales in food stores	720
	Retail Warehouses	5,700
	Sub Total	10,270
Fakenham	Town Centre	4,430
	Comparsion sales in food stores	1,010
	Retail Warehouses	7,100
	Sub-Total	12,540
Holt	Town Centre	4,680
	Bakers and Larners	1,959
	Comparsion sales in food stores	100
	Sub-Total	6,739
North Walsham	Town Centre	1,373
	Roys of Wroxham	1,010
	Comparison sales in food stores	1,108
	Sub Total	3,491
Sheringham	Town Centre	4,200
	Comparsion sales in food stores	150
	Sub-Total	4,350
Hoveton/Wroxham	Roys of Wroxham	3,300
	Other Hoveton	700
	Sub-Total	4,000
Stalham	Town Centre	1,860
	Comparsion sales in food stores	170
	Sub Total	2,030
Wells-next-the-Sea	Town Centre	1,590
	Comparsion sales in food stores	60
	Sub Total	1,650
TOTAL		45,070

Source: NLP Land use survey 2016 and VOA

Table 11 **Summary of Comparison Goods Expenditure 2016 to 2036 (£M)**

Area	2016	2021	2026	2031	2036
Available Expenditure					
Cromer	57.65	64.53	76.76	91.52	108.83
Fakenham	49.85	55.84	66.48	79.36	94.49
Holt	32.56	36.44	43.07	50.92	60.09
North Walsham	26.17	29.29	34.96	41.90	50.05
Sheringham	23.63	26.46	31.31	37.07	43.81
Hoveton/Wroxham	19.01	21.27	25.06	29.48	34.66
Stalham	6.53	7.31	8.72	10.42	12.41
Wells-next-to-the-Sea	4.85	5.43	6.37	7.46	8.72
Other North Norfolk District	16.58	18.54	21.68	25.24	29.38
Total	236.84	265.11	314.42	373.36	442.45
Benchmark Turnover of Existing Facilities					
Cromer	57.65	63.65	70.28	77.59	85.67
Fakenham	49.85	55.04	60.77	67.09	74.08
Holt (1)	32.56	37.54	41.45	45.76	50.52
North Walsham	26.17	28.89	31.90	35.22	38.88
Sheringham	23.63	26.09	28.81	31.81	35.12
Hoveton/Wroxham	19.01	20.99	23.18	25.59	28.25
Stalham	6.53	7.21	7.97	8.79	9.71
Wells-next-to-the-Sea	4.85	5.36	5.91	6.53	7.21
Other North Norfolk District	16.58	18.30	20.21	22.31	24.63
Total	236.84	263.08	290.46	320.69	354.07
Surplus Expenditure (£m)					
Cromer	0.00	0.88	6.48	13.92	23.16
Fakenham	0.00	0.80	5.72	12.27	20.41
Holt	0.00	-1.10	1.63	5.16	9.57
North Walsham	0.00	0.40	3.07	6.68	11.17
Sheringham	0.00	0.36	2.50	5.27	8.70
Hoveton/Wroxham	0.00	0.28	1.88	3.89	6.40
Stalham	0.00	0.10	0.75	1.62	2.70
Wells-next-to-the-Sea	0.00	0.07	0.46	0.93	1.51
Other North Norfolk District	0.00	0.24	1.47	2.93	4.75
Total	0.00	2.03	23.96	52.67	88.38

Source: Tables 5 to 12

(1) including Aldi commitment at 2021 - 228 sq.m comparison sales at £6,980 p.s.m

Table 14 Comparison Goods Floorspace Capacity 2016 to 2036

Area	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£6,000	£6,624	£7,314	£8,075	£8,916
Floorspace Projection (sq.m net)					
Cromer	0	133	887	1,724	2,598
Fakenham	0	121	781	1,520	2,290
Holt	0	-166	223	639	1,073
North Walsham	0	60	419	827	1,253
Sheringham	0	55	342	652	976
Hoveton/Wroxham	0	42	257	482	718
Stalham	0	15	103	201	303
Wells-next-to-the-Sea	0	11	63	115	170
Other North Norfolk District	0	36	201	363	533
Total	0	307	3,275	6,523	9,913
Floorspace Projection (sq.m gross)					
Cromer	0	178	1,182	2,299	3,464
Fakenham	0	161	1,042	2,026	3,053
Holt	0	-221	297	852	1,431
North Walsham	0	80	559	1,103	1,670
Sheringham	0	73	457	870	1,301
Hoveton/Wroxham	0	56	342	643	957
Stalham	0	20	137	268	404
Wells-next-to-the-Sea	0	15	84	153	226
Other North Norfolk District	0	48	268	483	710
Total	0	409	4,367	8,697	13,217

Appendix 4: Food /Beverage Assessment

Table 1 Study Area Population

Zone	2011	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	20,762	21,232	21,846	22,521	23,135	23,687
Zone 2A - Holt	12,509	12,792	13,162	13,569	13,939	14,271
Zone 2B - Sheringham/Cromer	26,466	27,066	27,848	28,708	29,491	30,195
Zone 3A - North Walsham	24,051	24,596	25,307	26,089	26,800	27,439
Zone 3B - Stalham/Hoveton	17,711	18,112	18,636	19,212	19,735	20,206
Zone 4 - Breckland/W. Norfolk	18,112	18,725	19,323	19,907	20,431	20,910
Zone 5 - Broadlands	26,611	27,059	27,742	28,510	29,236	29,897
Zone 6 - Great Yarmouth	22,256	22,622	23,057	23,560	24,017	24,475
Study Area Total	168,478	172,205	176,920	182,076	186,783	191,081
Tourism (staying/day trips)	n/a	26,800	26,800	26,800	26,800	26,800

Sources:

Experian 2011 Census of Population

Office of National Statistics 2014 SNPP projections

Economic Impact of Tourism : North Norfolk - 9.8 million tourist days - average additional 26,800

Table 2 Food and Beverage Expenditure per person per annum (£)

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	1,095	1,146	1,230	1,325	1,428
Zone 2A - Holt	1,184	1,239	1,330	1,433	1,543
Zone 2B - Sheringham/Cromer	1,097	1,149	1,233	1,328	1,430
Zone 3A - North Walsham	1,047	1,096	1,176	1,267	1,364
Zone 3B - Stalham/Hoveton	1,176	1,231	1,321	1,423	1,533
Zone 4 - Breckland/W. Norfolk	1,244	1,302	1,397	1,505	1,621
Zone 5 - Broadlands	1,138	1,191	1,278	1,376	1,483
Zone 6 - Great Yarmouth	1,140	1,193	1,280	1,379	1,486
Tourism	5,475	5,731	6,150	6,625	7,137

Sources:

Experian Local Expenditure 2014 (2014 prices)

Growth Rates: 1.3% 2014-2015, 1.9% 2015-2016, 0.5% 2016-2017, 0.2% 2017 to 2018, 1.3% p.a. from 2019 to 2023 and 1.5% from 2024

Economic Impact of Tourism: North Norfolk - average catering spend = £15 per day

Table 3 **Total Food and Beverage Expenditure (£m)**

Zone	2016	2021	2026	2031	2036
Zone 1 - Fakenham/Wells	23.25	25.05	27.71	30.66	33.82
Zone 2A - Holt	15.15	16.31	18.05	19.97	22.03
Zone 2B - Sheringham/Cromer	29.70	31.99	35.38	39.16	43.19
Zone 3A - North Walsham	25.74	27.73	30.67	33.94	37.44
Zone 3B - Stalham/Hoveton	21.30	22.94	25.37	28.08	30.97
Zone 4 - Breckland/W. Norfolk	23.29	25.16	27.81	30.75	33.90
Zone 5 - Broadlands	30.78	33.03	36.43	40.24	44.33
Zone 6 - Great Yarmouth	25.78	27.50	30.16	33.12	36.36
Study Area Total	194.99	209.71	231.58	255.92	282.04
Tourism	146.73	153.60	164.82	177.55	191.28
Total	341.72	363.31	396.40	433.48	473.32

Source: Tables 1 and 2

Table 4 **Base Year 2016 Food and Beverage Market Shares (%)**

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism
Cromer	0.7%	3.4%	23.6%	7.9%	2.2%	0.4%	1.1%	0.0%	15.0%
Fakenham	36.0%	2.9%	2.4%	0.0%	0.0%	4.6%	0.0%	0.0%	10.0%
Holt	3.0%	38.8%	7.5%	0.8%	0.6%	0.0%	0.7%	0.0%	8.0%
North Walsham	0.0%	0.0%	0.6%	13.6%	10.7%	1.8%	5.9%	0.6%	5.0%
Sheringham	1.6%	2.1%	26.5%	0.7%	0.0%	1.2%	4.3%	0.0%	19.0%
Hoveton/Wroxham	0.0%	0.9%	0.0%	0.0%	4.9%	0.0%	6.8%	0.3%	7.0%
Stalham	0.0%	0.0%	0.0%	0.8%	8.1%	0.0%	0.0%	0.0%	4.0%
Wells-next-to-the-Sea	10.4%	1.0%	0.0%	0.0%	0.0%	2.1%	2.0%	0.0%	7.0%
Other North Norfolk District	19.1%	20.3%	10.4%	5.9%	14.8%	3.5%	2.9%	7.2%	25.0%
NNDC Total	70.8%	69.4%	71.0%	29.7%	41.3%	13.6%	23.7%	8.1%	100.0%
Aylesham	0.0%	4.1%	2.4%	1.0%	0.0%	0.0%	14.7%	0.0%	0.0%
Great Yarmouth	0.0%	0.0%	2.7%	0.9%	2.4%	0.0%	0.0%	41.9%	0.0%
Kings Lynn	0.7%	0.0%	0.0%	0.0%	0.0%	14.4%	0.0%	0.0%	0.0%
Norwich	15.9%	21.7%	19.6%	61.7%	34.4%	29.6%	47.6%	23.7%	0.0%
Swaffham	1.0%	0.0%	0.0%	0.0%	0.0%	2.7%	0.0%	0.0%	0.0%
Other Outside North Norfolk	11.6%	4.8%	4.3%	6.7%	21.9%	39.7%	14.0%	26.3%	0.0%
Other Sub-Total	29.2%	30.6%	29.0%	70.3%	58.7%	86.4%	76.3%	91.9%	0.0%
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: NEMS Household Survey October 2016 (weighted results).

Economic Impact of Tourism: North Norfolk and NLP estimates

Table 5 Base Year 2016 Food and Beverage Expenditure Patterns (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2016	23.25	15.15	29.70	25.74	21.30	23.29	30.78	25.78	146.73	341.72
Cromer	0.16	0.51	7.01	2.03	0.47	0.09	0.34	0.00	22.01	32.63
Fakenham	8.37	0.44	0.71	0.00	0.00	1.07	0.00	0.00	14.67	25.27
Holt	0.70	5.88	2.23	0.21	0.13	0.00	0.22	0.00	11.74	21.09
North Walsham	0.00	0.00	0.18	3.50	2.28	0.42	1.82	0.15	7.34	15.68
Sheringham	0.37	0.32	7.87	0.18	0.00	0.28	1.32	0.00	27.88	38.22
Hoveton/Wroxham	0.00	0.14	0.00	0.00	1.04	0.00	2.09	0.08	10.27	13.62
Stalham	0.00	0.00	0.00	0.21	1.72	0.00	0.00	0.00	5.87	7.80
Wells-next-to-the-Sea	2.42	0.15	0.00	0.00	0.00	0.49	0.62	0.00	10.27	13.95
Other North Norfolk District	4.44	3.07	3.09	1.52	3.15	0.82	0.89	1.86	36.68	55.52
North Norfolk Total	16.46	10.51	21.09	7.65	8.79	3.17	7.30	2.09	146.73	223.78
Aylesham	0.00	0.62	0.71	0.26	0.00	0.00	4.52	0.00		6.12
Great Yarmouth	0.00	0.00	0.80	0.23	0.51	0.00	0.00	10.80		12.35
Kings Lynn	0.16	0.00	0.00	0.00	0.00	3.35	0.00	0.00		3.52
Norwich	3.70	3.29	5.82	15.88	7.33	6.89	14.65	6.11		63.67
Swaffham	0.23	0.00	0.00	0.00	0.00	0.63	0.00	0.00		0.86
Other Outside North Norfolk	2.70	0.73	1.28	1.72	4.66	9.25	4.31	6.78		31.43
Other Sub-Total	6.79	4.63	8.61	18.10	12.50	20.12	23.49	23.69		117.94
TOTAL	23.25	15.15	29.70	25.74	21.30	23.29	30.78	25.78		341.72

Source: Table 3 and 4

Table 6 Future 2021 Food and Beverage Expenditure Patterns (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2021	25.05	16.31	31.99	27.73	22.94	25.16	33.03	27.50	153.60	363.31
Cromer	0.18	0.55	7.55	2.19	0.50	0.10	0.36	0.00	23.04	34.48
Fakenham	9.02	0.47	0.77	0.00	0.00	1.16	0.00	0.00	15.36	26.77
Holt	0.75	6.33	2.40	0.22	0.14	0.00	0.23	0.00	12.29	22.36
North Walsham	0.00	0.00	0.19	3.77	2.45	0.45	1.95	0.17	7.68	16.66
Sheringham	0.40	0.34	8.48	0.19	0.00	0.30	1.42	0.00	29.18	40.32
Hoveton/Wroxham	0.00	0.15	0.00	0.00	1.12	0.00	2.25	0.08	10.75	14.35
Stalham	0.00	0.00	0.00	0.22	1.86	0.00	0.00	0.00	6.14	8.22
Wells-next-to-the-Sea	2.60	0.16	0.00	0.00	0.00	0.53	0.66	0.00	10.75	14.71
Other North Norfolk District	4.78	3.31	3.33	1.64	3.39	0.88	0.96	1.98	38.40	58.67
North Norfolk Total	17.73	11.32	22.71	8.24	9.47	3.42	7.83	2.23	153.60	236.55
Aylesham	0.00	0.67	0.77	0.28	0.00	0.00	4.86	0.00		6.57
Great Yarmouth	0.00	0.00	0.86	0.25	0.55	0.00	0.00	11.52		13.19
Kings Lynn	0.18	0.00	0.00	0.00	0.00	3.62	0.00	0.00		3.80
Norwich	3.98	3.54	6.27	17.11	7.89	7.45	15.72	6.52		68.48
Swaffham	0.25	0.00	0.00	0.00	0.00	0.68	0.00	0.00		0.93
Other Outside North Norfolk	2.91	0.78	1.38	1.86	5.02	9.99	4.62	7.23		33.79
Other Sub-Total	7.31	4.99	9.28	19.49	13.46	21.74	25.21	25.28		126.76
TOTAL	25.05	16.31	31.99	27.73	22.94	25.16	33.03	27.50		363.31

Source: Table 3 and 4

Table 7 Future 2026 Food and Beverage Expenditure Patterns (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2026	27.71	18.05	35.38	30.67	25.37	27.81	36.43	30.16	164.82	396.40
Cromer	0.19	0.61	8.35	2.42	0.56	0.11	0.40	0.00	24.72	37.37
Fakenham	9.97	0.52	0.85	0.00	0.00	1.28	0.00	0.00	16.48	29.11
Holt	0.83	7.00	2.65	0.25	0.15	0.00	0.26	0.00	13.19	24.32
North Walsham	0.00	0.00	0.21	4.17	2.71	0.50	2.15	0.18	8.24	18.17
Sheringham	0.44	0.38	9.38	0.21	0.00	0.33	1.57	0.00	31.31	43.63
Hoveton/Wroxham	0.00	0.16	0.00	0.00	1.24	0.00	2.48	0.09	11.54	15.51
Stalham	0.00	0.00	0.00	0.25	2.06	0.00	0.00	0.00	6.59	8.89
Wells-next-to-the-Sea	2.88	0.18	0.00	0.00	0.00	0.58	0.73	0.00	11.54	15.91
Other North Norfolk District	5.29	3.66	3.68	1.81	3.76	0.97	1.06	2.17	41.20	63.60
North Norfolk Total	19.62	12.52	25.12	9.11	10.48	3.78	8.63	2.44	164.82	256.52
Aylesham	0.00	0.74	0.85	0.31	0.00	0.00	5.36	0.00		7.25
Great Yarmouth	0.00	0.00	0.96	0.28	0.61	0.00	0.00	12.64		14.48
Kings Lynn	0.19	0.00	0.00	0.00	0.00	4.01	0.00	0.00		4.20
Norwich	4.41	3.92	6.94	18.93	8.73	8.23	17.34	7.15		75.63
Swaffham	0.28	0.00	0.00	0.00	0.00	0.75	0.00	0.00		1.03
Other Outside North Norfolk	3.21	0.87	1.52	2.06	5.56	11.04	5.10	7.93		37.29
Other Sub-Total	8.09	5.52	10.26	21.56	14.89	24.03	27.80	27.72		139.87
TOTAL	27.71	18.05	35.38	30.67	25.37	27.81	36.43	30.16		396.40

Source: Table 3 and 4

Table 8 Future 2031 Food and Beverage Expenditure Patterns (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2031	30.66	19.97	39.16	33.94	28.08	30.75	40.24	33.12	177.55	433.48
Cromer	0.21	0.68	9.24	2.68	0.62	0.12	0.44	0.00	26.63	40.63
Fakenham	11.04	0.58	0.94	0.00	0.00	1.41	0.00	0.00	17.76	31.73
Holt	0.92	7.75	2.94	0.27	0.17	0.00	0.28	0.00	14.20	26.53
North Walsham	0.00	0.00	0.23	4.62	3.00	0.55	2.37	0.20	8.88	19.86
Sheringham	0.49	0.42	10.38	0.24	0.00	0.37	1.73	0.00	33.74	47.36
Hoveton/Wroxham	0.00	0.18	0.00	0.00	1.38	0.00	2.74	0.10	12.43	16.82
Stalham	0.00	0.00	0.00	0.27	2.27	0.00	0.00	0.00	7.10	9.65
Wells-next-to-the-Sea	3.19	0.20	0.00	0.00	0.00	0.65	0.80	0.00	12.43	17.27
Other North Norfolk District	5.86	4.05	4.07	2.00	4.16	1.08	1.17	2.38	44.39	69.16
North Norfolk Total	21.71	13.86	27.80	10.08	11.60	4.18	9.54	2.68	177.55	279.00
Aylesham	0.00	0.82	0.94	0.34	0.00	0.00	5.92	0.00		8.01
Great Yarmouth	0.00	0.00	1.06	0.31	0.67	0.00	0.00	13.88		15.91
Kings Lynn	0.21	0.00	0.00	0.00	0.00	4.43	0.00	0.00		4.64
Norwich	4.87	4.33	7.67	20.94	9.66	9.10	19.16	7.85		83.59
Swaffham	0.31	0.00	0.00	0.00	0.00	0.83	0.00	0.00		1.14
Other Outside North Norfolk	3.56	0.96	1.68	2.27	6.15	12.21	5.63	8.71		41.18
Other Sub-Total	8.95	6.11	11.36	23.86	16.48	26.57	30.71	30.44		154.48
TOTAL	30.66	19.97	39.16	33.94	28.08	30.75	40.24	33.12		433.48

Source: Table 3 and 4

Table 9 Future 2036 Food and Beverage Expenditure Patterns (£m)

Location	Zone 1	Zone 2A	Zone 2B	Zone 3A	Zone 3B	Zone 4	Zone 5	Zone 6	Tourism	Total
Expenditure 2036	33.82	22.03	43.19	37.44	30.97	33.90	44.33	36.36	191.28	473.32
Cromer	0.24	0.75	10.19	2.96	0.68	0.14	0.49	0.00	28.69	44.13
Fakenham	12.17	0.64	1.04	0.00	0.00	1.56	0.00	0.00	19.13	34.54
Holt	1.01	8.55	3.24	0.30	0.19	0.00	0.31	0.00	15.30	28.90
North Walsham	0.00	0.00	0.26	5.09	3.31	0.61	2.62	0.22	9.56	21.67
Sheringham	0.54	0.46	11.45	0.26	0.00	0.41	1.91	0.00	36.34	51.37
Hoveton/Wroxham	0.00	0.20	0.00	0.00	1.52	0.00	3.01	0.11	13.39	18.23
Stalham	0.00	0.00	0.00	0.30	2.51	0.00	0.00	0.00	7.65	10.46
Wells-next-to-the-Sea	3.52	0.22	0.00	0.00	0.00	0.71	0.89	0.00	13.39	18.73
Other North Norfolk District	6.46	4.47	4.49	2.21	4.58	1.19	1.29	2.62	47.82	75.12
North Norfolk Total	23.94	15.29	30.67	11.12	12.79	4.61	10.51	2.95	191.28	303.14
Aylesham	0.00	0.90	1.04	0.37	0.00	0.00	6.52	0.00		8.83
Great Yarmouth	0.00	0.00	1.17	0.34	0.74	0.00	0.00	15.23		17.48
Kings Lynn	0.24	0.00	0.00	0.00	0.00	4.88	0.00	0.00		5.12
Norwich	5.38	4.78	8.47	23.10	10.65	10.04	21.10	8.62		92.13
Swaffham	0.34	0.00	0.00	0.00	0.00	0.92	0.00	0.00		1.25
Other Outside North Norfolk	3.92	1.06	1.86	2.51	6.78	13.46	6.21	9.56		45.36
Other Sub-Total	9.87	6.74	12.53	26.32	18.18	29.29	33.83	33.41		170.17
TOTAL	33.82	22.03	43.19	37.44	30.97	33.90	44.33	36.36		473.32

Source: Table 3 and 4

Table 10 Summary of Food and Beverage Expenditure 2016 to 2036 (£M)

	2016	2021	2026	2031	2036
Available Expenditure					
Cromer	32.63	34.48	37.37	40.63	44.13
Fakenham	25.27	26.77	29.11	31.73	34.54
Holt	21.09	22.36	24.32	26.53	28.90
North Walsham	15.68	16.66	18.17	19.86	21.67
Sheringham	38.22	40.32	43.63	47.36	51.37
Hoveton/Wroxham	13.62	14.35	15.51	16.82	18.23
Stalham	7.80	8.22	8.89	9.65	10.46
Wells-next-to-the-Sea	13.95	14.71	15.91	17.27	18.73
Other North Norfolk District	55.52	58.67	63.60	69.16	75.12
Total	223.78	236.55	256.52	279.00	303.14
Turnover of Existing Facilities					
Cromer	32.63	34.29	36.04	37.88	39.82
Fakenham	25.27	26.56	27.91	29.34	30.83
Holt	21.09	22.17	23.30	24.48	25.73
North Walsham	15.68	16.48	17.33	18.21	19.14
Sheringham	38.22	40.17	42.22	44.37	46.64
Hoveton/Wroxham	13.62	14.32	15.05	15.81	16.62
Stalham	7.80	8.20	8.62	9.06	9.52
Wells-next-to-the-Sea	13.95	14.66	15.40	16.19	17.02
Other North Norfolk District	55.52	58.35	61.33	64.46	67.75
Total	223.78	235.20	247.20	259.81	273.06

Source: Tables 5 to 9

Table 11 Food and Beverage Floorspace Capacity up to 2036

	2021	2026	2031	2036
Available Expenditure Surplus £M				
Cromer	0.18	1.33	2.75	4.32
Fakenham	0.22	1.20	2.39	3.71
Holt	0.19	1.03	2.05	3.16
North Walsham	0.18	0.84	1.65	2.53
Sheringham	0.15	1.41	2.98	4.73
Hoveton/Wroxham	0.04	0.46	1.01	1.61
Stalham	0.03	0.28	0.59	0.94
Wells-next-the-Sea	0.05	0.51	1.08	1.71
Other North Norfolk District	0.32	2.27	4.70	7.38
Total	1.35	9.33	19.20	30.09
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805
Floorspace Projection (sq.m gross)				
Cromer	37	253	498	744
Fakenham	43	228	433	638
Holt	39	196	371	545
North Walsham	36	161	299	437
Sheringham	30	268	540	815
Hoveton/Wroxham	7	88	182	277
Stalham	5	53	107	162
Wells-next-the-Sea	10	96	195	294
Other North Norfolk District	63	433	851	1,271
Total	270	1,775	3,475	5,183

Appendix 5: Analysis of Centres

A. Fakenham

Fakenham is a traditional market town located in the west of the District. It is designated as a Principal Settlement with a Large Town Centre within the North Norfolk Core Strategy, and is located at the top of the retail hierarchy alongside the settlements of Cromer and North Walsham. It has a good selection of retail and service uses and its key roles include:

- *convenience shopping* – including a large Tesco (2,033 sq.m net) and an Aldi (1,051 sq.m net) and a number of small convenience outlets which serve basket/top-up food shopping trips. In addition to these town centre facilities Fakenham has out of centre Morrison's (2,656 sq.m net) and Lidl (970 sq.m net) stores.
- *comparison shopping* – there is a good range of independent shops and a small range of multiples (chain stores) selling a range of comparison goods.
- *services* – there is a post office, a good range of high street national banks, and a reasonable selection of cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours; and
- *entertainment* – there is a Hollywood Cinema and several pubs within the town centre as well as a gym and a library located just outside the town centre boundary.

The household shopper survey results (Appendix 6) indicate that Fakenham is the main destination for 6.1% of respondents for non-food shopping and 15.5% for food shopping in the study area as a whole. Fakenham has the highest market share in the District for non-food shopping and the second highest for food shopping.

Within the Fakenham primary shopping area there are of 98 Class A retail/ service uses. In the wider town centre area there are 130 Class A units in total. The diversity of Class A uses in the centre is set out in Table A.1, and the results are compared with the national average.

Table A.1 Fakenham Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Units	
			Fakenham %	UK Average ⁽¹⁾
Comparison Retail	39	47	36.2	35.8
Convenience Retail	13	16	12.3	8.4
A1 Services ⁽²⁾	8	11	8.5	12.3
A2 Services ⁽³⁾	18	21	16.2	12.3
A3/A5	13	20	15.4	14.9
A4 Pubs/bar	0	3	2.3	4.5
Vacant	7	12	9.2	11.8
Total	98	130	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The mix of uses is similar to the national average. The main variations are a higher proportion of convenience retail and A2 services when compared with the national average. The proportion of A1 services is marginally below the national average. The proportion of vacant units is significantly lower than the national average, which suggests demand for premises is reasonably strong. A number of retail units affected by fire to the rear of the cinema are being refurbished, which should reduce the vacancy rate further.

Fakenham town centre has a good selection of comparison shops (47) reflecting its size and role in the shopping hierarchy. There is a small selection of multiple comparison retailers including Argos, M&Co, Select Fashion, Carphone Warehouse, Boots, Specsavers, Holland and Barrett, Costa and a Subway. The multiple retailers are concentrated along Millers Walk, Bridge Street and Market Place, within the primary retail frontage.

Fakenham Town Centre has a good range of non-retail service uses, with a choice of facilities across all categories, as shown in Table A.2.

Table A.2 Fakenham Town Centre Analysis of Selected Service Uses

Type of Unit	Fakenham		% UK Average *
	Total Units 2016	%	
Restaurants/cafés	11	20.4	22.5
Fast food/takeaways	9	16.7	14.7
Pubs/bars	3	5.6	11.1
Banks/other financial services	12	22.2	11.8
Betting shops/casinos	1	1.9	3.8
Estate agents/valuers	7	13.0	9.1
Travel agents	2	3.70	2.2
Hairdressers/beauty parlours	9	16.7	22.7
Laundries/dry cleaners	0	0.0	2.1
Total	54	100.0	100.0
Other A1 Retail Services	0	n/a	n/a
Total	54	n/a	n/a

Source: Lichfields' Site Visit September 2016. UK average for all town centres surveyed by Goad Plans

The majority of selected service uses are represented within Fakenham. The centre has an above average proportion of fast food/takeaways, banks/other financial services, estate agents/valuers and travel agents, and in contrast a below average proportion of restaurants/cafés, pubs/bars and betting shops/casinos.

There is a selection of multiple and independent restaurants and cafés present within Fakenham, including Costa Coffee and Subway.

Most of the main high street banks/building societies are represented within Fakenham town centre including: HSBC, Lloyds, Nationwide, Barclays and a Norwich & Peterborough Building Society.

In addition to these service uses, Fakenham town centre is represented by a limited range of leisure, entertainment and cultural uses, including a Hollywood Cinema as well as a gym and a library, located just outside the town centre boundary, which help to attract visitors to the town centre. This provision suggests the evening economy is reasonably strong.

Fakenham town centre is focused around the historic core of the Market Place and Corn Exchange. The town centre includes a Primary Shopping Area focused around the enclosed Miller's Walk, Market Place and Bridge Street. Norwich Street and Oak Street are within the town centre boundary but not part of the designated shopping area. The town centre is located within the Fakenham Conservation Area boundary and within the town centre there are number of buildings of historical importance including Grade I, Grade II* and Grade II buildings. This provides an attract environment to shop, but places constraints on development.

Respondents to the household survey were asked what would make you shop more often in Fakenham town centre. Of those who suggested improvements to the town centre, the majority of respondents mentioned better quality or a more diverse range of shops. The key results were:

- 8% of respondents would shop at Fakenham if it was closer to home;
- 8% wanted a better choices of shops in general;
- 4% wanted a better choice of clothing shops; and,
- 3% wanted more/better car parking.

Based on Lichfields' site visit (September 2016) there are 12 vacant retail units within Fakenham town centre. The vacancy rate is 9.2%, which is below the national average of 11.8%. The vacant units are evenly spread across the town centre with only 3 vacancies within the primary shopping area (35-37 Upper Market, 5 Market Place and 3 Millers Walk).

Zone A retail rents vary significantly throughout the centre, as shown in Table A.3 below. Retail rents in Fakenham vary significantly ranging from £175 per sq.m in the peripheral area of the Market Place to £394 per sq.m within the Miller Walk primary shopping area. This information confirms the highest rents are within the primary shopping area.

Table A.3 Fakenham Town Centre Zone A Retail Rents

Location	£ per sq.m
Millers Walk (Primary Shopping Area)	319 to 394
Bridge Street (Primary Shopping Area)	225 to 368
Market Place (Primary Shopping Area)	175 to 300
Norwich Street	200 to 225

Location	£ per sq.m
Old Post Office Street	300
Oak Street	200 to 255

Source: Valuation Office Agency Business Rates

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping with 89.3% of respondents travelling by car as driver or passenger for their main food shopping and 82.7% for their non-food shopping.

The most proximate car park to Fakenham Town Centre is Bridge Street car park located to the south of the Main Town Centre boundary. Bridge Street car park has capacity for 97 spaces and has a limited number of free 30 minute car parking spaces. Outside of this 30 minute window the car park charges are £1 for the first two hours and then 70p per additional hour. Bridge Street Car Park is complemented by The Limes/Mill Court (130 spaces) and Queens Road (117 spaces). The household survey results do not indicate high levels of dissatisfaction with car parking provision.

The centre is reasonably served by buses, with bus routes from surrounding areas within the District and beyond. The household survey identified that a total of 1.9% of respondents travel by bus, minibus or coach for their food shopping and 6.6% travel by this method for their non-food shopping.

The town centre benefits from wide pavements and traffic calming cobbled surface which limits the speed of traffic movements. As a result, Fakenham town centre is a pedestrian friendly shopping environment and this is reflected by the household survey results where traffic management was not raised as a problem discouraging shoppers from visiting Fakenham town centre.

B. Cromer

Cromer is a Victorian seaside town located in the central area of the District. It is designated as a Principal Settlement with a Large Town Centre within the North Norfolk Core Strategy, and is located at the top of the retail hierarchy alongside the settlements of Fakenham and North Walsham. It has a reasonable number of retail and service uses and its key roles include:

- *convenience shopping* – Cromer town centre includes a Bugden’s (746 sq.m net) and an Iceland (446 sq.m net) and a number of small convenience outlets which serve basket/top-up food shopping trips. There is a large edge of centre Morrison’s (2,526 sq.m net), and out of centre Co-op (1,087 sq.m net) and a Lidl (1,030 sq.m net) stores;
- *comparison shopping* – there is a reasonable range of independent shops selling a range of comparison goods. There is a limited range of multiples (chain stores) include a Boots, Mountain Warehouse, M&Co and a Superdrug;
- *services* – there is a post office, a good range of high street national banks, and a reasonable selection of cafés, restaurants, takeaways, travel agents and hairdressers/beauty parlours; and
- *entertainment* – there is a Regal Movieplex Cinema and several pubs.

The household shopper survey results (Appendix 6) indicate that Cromer is the main destination for 5.1% of respondents for non-food shopping and 11.9% for food shopping in the study area as a whole. Cromer has the second highest market share in the District for non-food shopping and the third highest for food shopping.

Within Cromer town centre’s primary shopping areas there are 120 Class A retail/service uses. In the wider town centre area there are 181 Class A units in total. The diversity of uses is set out in Table B.1, and the results are compared with the national average.

Table B.1 Cromer Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Units	
			Cromer %	UK Average ⁽¹⁾
Comparison Retail	51	72	39.8	35.8
Convenience Retail	18	20	11.0	8.4
A1 Services ⁽²⁾	11	18	9.9	12.3
A2 Services ⁽³⁾	13	21	11.6	12.3
A3/A5	19	30	16.6	14.9
A4 Pubs/bar	3	6	3.3	4.5
Vacant	5	14	7.7	11.8
Total	120	181	100.0	100.0

Source: Lichfields’ Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans (June 2015)

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The centre has a higher proportion of comparison and convenience retail when compared with the national average. The proportion of A1 and A2 services and A4 pub/bars are marginally lower than the national average. The proportion of A3/A5 is marginally above the national average and reflects Cromer role as a tourist destination. The proportion of vacant units is significantly lower than the national average, which suggests strong demand for premises.

Cromer town centre has a reasonable selection of comparison shops (72) reflecting its size and role in the shopping hierarchy. The proportion of comparison goods units is higher than the national average, reflecting the main shopping role of the centre.

There is a relatively small selection of multiple comparison retailers including Mountain Warehouse, M & Co, Boots and a Superdrug. The multiple retailers are concentrated along Church Street within the primary retail frontage.

Cromer Town Centre has a good range of non-retail service uses, with a choice of service providers across all categories, as shown in Table B.2.

Table B.2 Cromer Town Centre Analysis of Selected Service Uses

Type of Unit	Cromer Town Centre		% UK Average*
	Units 2016	%	
Restaurants/cafés	25	36.2	22.5
Fast food/takeaways	5	7.2	14.7
Pubs/bars	6	8.7	11.1
Banks/other financial services	15	21.7	11.8
Betting shops/casinos	1	1.4	3.8
Estate agents/valuers	5	7.2	9.1
Travel agents	1	1.4	2.2
Hairdressers/beauty parlours	10	14.5	22.7
Laundries/dry cleaners	1	1.4	2.1
Total	69	100.0	100.0
Other A1 Retail Services	6	n/a	n/a
Total	75	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans

The proportion of units in the majority of categories is notably different to the national average. The centre has an above average proportion of restaurants/cafés and banks/other financial services and a below average proportion of food/takeaways, pubs/bars and hairdressers/beauty parlours. The proportion of estate agents/valuers, travel agents and laundries/dry cleaners are comparable with the national average.

There are a selection of independent restaurants, café and bar chains present within Cromer town centre, which support the Regal Movieplex cinema. This provision suggests the evening economy is reasonably strong.

Most of the main high street banks/building societies are represented within Cromer town centre including, Barclays, Santander, HSBC, Natwest and Norwich and Peterborough Building Society.

In addition to these service uses, Cromer town centre is represented by a limited range of leisure, entertainment and cultural uses, including Regal Movieplex Cinema and Cromer Museum which help to attract visitors to the centre.

Cromer town centre is focused around Church Street and Cromer Parish Church. The town centre includes a Primary Shopping Area focused around Church Street and the west of the High Street. West Street, Chapel Street, Garden Street, Jetty Street, Tucker Street, Hans Place and Bond Street are within the town centre boundary but not part of the designated shopping area.

Cromer town centre is designated as a Conservation Area and includes a number of listed buildings. The centre has benefited from a recent regeneration that has enhanced the core retail area through traffic calming and an improved pedestrian environment. Despite this, Church Street remains busy with a significant number of vehicle movements.

Respondents to the household survey were asked what would make you shop more often in Cromer town centre. Of those who suggested improvements to the town centre, the majority of respondents mentioned better quality or a more diverse range of shops and improvements to parking. The key results were:

- 7% of respondents would shop at Cromer if it was closer to home;
- 6% of respondents wanted more/better car parking;
- 5% of respondents wanted a better choice of shops in general; and,
- 4% of respondents wanted a better choice of clothing shops.

These responses suggest that improvements to parking and the range of shops should help to improve the number of visitors to Cromer town centre.

In addition, respondents were asked “*do you or your family do any of the following leisure activities?*” of which over 60% of respondents indicated that they visited the Cinema.

Of those who visited the cinema, almost 25% of respondents (23.5%) stated that they visited the Regal Movieplex Cinema in Cromer which meant that it was the most popular Cinema in the District. The householder survey indicates that the cinema draws visitors from across the District with the highest flows from Zones 2B, 2A, 3A and 5. This suggests the Regal Movieplex Cinema is a key asset to Cromer’s town centre.

Based on Lichfields’ site visit (September 2016) there are 14 vacant retail units within Cromer town centre. The vacancy rate is 7.7%, which is significantly below the national average of 11.8%.

Within the town centre boundary, vacant units are located on Church Street, Hamilton Road and Garden Street. There is only one vacant unit within the Primary Shopping Area.

Vacancies comprise small retail units with all of the vacant units under 100 sq.m gross. This reflects the increasing preference for operators to occupy larger modern units. Zone A retail rents vary significantly throughout the centre, as shown in Table A.3 below. The prime pitch is on Church Street.

Table A.3 Cromer Town Centre Zone A Retail Rents

Location	£ per sq.m
Church Street	265 to 450
Garden Street	180 to 315
High Street	80 to 350
Tucker Street	210
Bond Street	160 to 195
Hans Place	100
Chapel Street	110 to 260
West Street	145 to 185

Source: Valuation Office Agency Business Rates

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping with 89.3% of respondents travelling by car as driver or passenger for their main food shopping and 82.7% for their non-food shopping.

The most proximate car park to Cromer Town Centre is Meadow Road with capacity of 265 spaces. The car park has a limited number of free 30 minute car parking spaces and outside of this 30 minute window the car park charges are £1.30 for the first hour and then £1 per additional hour. Meadow Road car park is complemented by Cadogan Road (120 spaces), Promenade (20 spaces) and Runton Road which has capacity for 1,037 spaces.

The centre is well served by buses, with bus routes from surrounding areas within the District and beyond. The household survey identified that a total of 1.9% of respondents travel by bus, minibus or coach for their food shopping and 6.6% (including park and ride) travel by this mode for their non-food shopping.

There is a railway station to the west of Cromer town centre which provides services to Norwich to the south and Sheringham to the west, but only 0.1% of household survey respondents travel by train for their non-food shopping.

Pedestrian access throughout the centre is reasonable, but the A149 is a barrier to pedestrian movement.

C. North Walsham

North Walsham is a historic market town located to the east of the District. It is designated as a Principal Settlement with a Large Town Centre within the North Norfolk Core Strategy, and is located at the top of the retail hierarchy alongside the settlements of Fakenham and Cromer. It has a reasonable range of retail and service uses, and primarily functions as a shopping and service centre for local residents. Its key roles include:

- *convenience shopping* – a Lidl (1,373 sq.m net) store is located within the town centre which is supported by 6 additional convenience shops that serve basket/top-up food shopping trips. There is a large Sainsbury's (3,006 sq.m net) and a Lidl (1,373 sq.m net) within the town centre boundary. There is a medium sized Waitrose (1,507 sq.m net) beyond the town centre boundary;
- *comparison shopping* – there is a reasonable range of comparison goods retailers within the centre, comprising independent retailers and a couple of national multiples including a QD and a Boots Pharmacy;
- *services* – including a Post Office, a good range of high street national bank, travel agency, a reasonable selection of cafés, restaurants, takeaways and hairdressers/beauty parlours; and
- *entertainment/leisure*: there is a limited entertainment/leisure offer with a library located just outside of the main town centre boundary.

The household shopper survey results (Appendix 6) indicate that North Walsham is the main destination for 4.1% of respondents for non-food shopping and 16.2% for food shopping in the study area as a whole. North Walsham has the third highest market share in the District for non-food shopping and the highest market share for food shopping.

In the North Walsham town centre's primary shopping area there are 91 Class A retail/service uses. In the wider town centre area there are 110 Class A units in total. The diversity of uses is set out in Table C.1, compared against the national average.

Table C.1 North Walsham Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Units	
			North Walsham %	UK Average ⁽¹⁾
Comparison Retail	30	37	33.6	35.8
Convenience Retail	7	7	6.4	8.4
A1 Services ⁽²⁾	9	14	12.7	12.3
A2 Services ⁽³⁾	15	16	14.5	12.3
A3/A5	9	13	11.8	14.9
A4 Pubs/bar	4	4	3.6	4.5
Vacant	17	19	17.3	11.8
Total	91	110	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The centre has a below average proportion of comparison and convenience retail units than the UK average. The centre has a higher proportion of A2 service units, and conversely a below average proportion of A3/A5 units compared to the national average. The proportion of vacant units is significantly higher than the UK average and the highest in the District, indicating weaker demand for premises within the centre.

North Walsham has a small selection of comparison units (37). The range and choice of comparison shopping is varied, however the proportion of charity shops (26.7%) is noticeably high. There is a limited selection of national multipliers including a QD and a Boots Pharmacy.

North Walsham also has a reasonable range and choice of non-retail service uses, with the majority of Goad categories represented. Table C.2 provides a breakdown of service shop units by category.

Table C.2 North Walsham Town Centre Analysis of Selected Service Uses

Type of Unit	North Walsham Town Centre		% UK Average*
	Units 2016	%	
Restaurants/cafés	7	15.2	22.5
Fast food/takeaways	6	13.0	14.7
Pubs/bars	4	8.7	11.1
Banks/other financial services	10	21.7	11.8
Betting shops/casinos	1	2.2	3.8
Estate agents/valuers	5	10.9	9.1
Travel agents	1	2.2	2.2
Hairdressers/beauty parlours	12	26.1	22.7
Laundries/dry cleaners	0	0	2.1
Total	46	100.0	100.0
Other A1 Retail Services	1	n/a	n/a
Total	47	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans (June 2015)

North Walsham town centre comprises a historic core stretching from Market Street to the west to Yarmouth Road to the east. The town centre includes a Primary Shopping Area focused around Market Place.

The town centre is designated as a Conservation Area and has one of the largest concentrations of Listed Buildings in the District. The centre benefits from a one way system and traffic calming which helps to create a relatively safe shopping environment.

Respondents to the household survey were asked what would make you shop more often in North Walsham town centre. Of those who suggested improvements to the town centre, the

majority of respondents mentioned better quality or a more diverse range of shops and improvements to parking. The key results were:

- 7% of respondents wanted a better choice of shops in general;
- 4% of respondents wanted a better choice of clothing shops.

These responses suggest that improvements to the range of shops, particularly clothing shops, should help to improve the number of visitors to North Walsham town centre.

There were 19 vacant units within North Walsham (September 2016) with the majority of vacant units located on Market Place which is designated as primary retail frontage.

The proportion of vacant units (17.3%) is above the national average (11.8%) and significantly above the vacancy rates for the other main town centres in North Norfolk, suggesting North Walsham is not performing as strongly as other centres.

Zone A retail rents vary significantly throughout the centre, as shown in Table A.3 below. The Market Place is the prime pitch.

Table A.3 North Walsham Town Centre Zone A Retail Rents

Location	£ per sq.m
Market Place	185 to 248
Market Street	150
Church Street	125 to 200
Yarmouth Road	62 to 165

Source: Valuation Office Agency Business Rates

D. Sheringham

Sheringham is a market and resort town located in the centre of the District with a strong tourist and retirement character. Sheringham is designated as a Secondary Settlement with a Small Town Centre within the North Norfolk Core Strategy. It has a reasonable range of retail and service uses, and primarily functions as a shopping and service centre for local residents but also attracting people from further afield. Its key roles include:

- *convenience shopping* – the main food stores in Sheringham is a mid -sized Tesco (1,355 sq.m net). The Tesco is supplemented by a Sainsbury's Local (222 sq.m net) and 23 additional convenience stores;
- *comparison shopping* – a reasonable range of comparison goods retailers within the centre, comprising independent retailers and a small number of national multiples including a WH Smith, Shoe Zone, Boots Pharmacy and a Store Twenty One;
- *services* – including a Post Office, a reasonable range of high street national bank, dry cleaners, shoe repairs, hairdressers/beauty parlours and a good selection of cafés, restaurants, takeaways; and
- *entertainment/leisure* - including the Sheringham Little Theatre, Red Lobster Gallery. Just outside of the centre to the north is the Sheringham Museum

The household shopper survey results (Appendix 6) indicate that Sheringham is the main destination for 2.9% of respondents for non-food shopping and 4.5% for food shopping in the study area as a whole. Sheringham has the fourth market share in the District for non-food shopping and the fifth highest for food shopping.

Within Sheringham town centre's primary shopping area there are 133 retail/service uses. In the wider town centre area there are 162 Class A units in total. The diversity of uses is set out in Table D.1, compared against the national average.

Table D.1 Sheringham Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Number of Units	
			Sheringham %	UK Average ⁽¹⁾
Comparison Retail	59	68	42.0	35.8
Convenience Retail	24	27	16.7	8.4
A1 Services ⁽²⁾	9	13	8.0	12.3
A2 Services ⁽³⁾	9	10	6.2	12.3
A3/A5	28	32	19.8	14.9
A4 Pubs/bar	1	6	3.7	4.5
Vacant	3	6	3.7	11.8
Total	133	162	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The centre has a higher proportion of comparison and convenience units than the UK average. The centre has a higher proportion of A3/A5 Units, and conversely a below average proportion of A1 Services, A2 Services and A4 pubs/bars. This mix reflects the centre's strong tourism role.

Sheringham has a reasonable selection of comparison units (68). There is a good range of independent retailers and a limited range of multiple retailers including a WH Smith's, Shoe Zone, Boots Pharmacy and a Store Twenty One.

Sheringham also has a reasonable range and choice of non-retail service uses, with the majority of Goad categories represented. Table D.2 provides a breakdown of service shop units by category.

Table D.2 Sheringham Town Centre Analysis of Selected Service Uses

Type of Unit	Sheringham Town Centre		% UK Average *
	Units 2016	%	
Restaurants/cafés	25	43.9	22.5
Fast food/takeaways	7	12.2	14.7
Pubs/bars	6	10.5	11.1
Banks/other financial services	5	8.8	11.8
Betting shops/casinos	3	5.3	3.8
Estate agents/valuers	2	3.5	9.1
Travel agents	1	1.8	2.2
Hairdressers/beauty parlours	7	12.3	22.7
Laundries/dry cleaners	1	1.8	2.1
Total	57	100.0	100.0
Other A1 Retail Services	4	n/a	n/a
Total	61	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans.

The majority of selected service uses are represented within Sheringham Town Centre. The centre has an above average proportion of restaurants/cafés and in contrast a below average proportion of pubs bars, estate agents and hairdressers/beauty salons. A good range of the main high street banks/building societies are represented within Sheringham town centre including: Barclays, Nationwide and Norwich & Peterborough Building Society.

In addition to these service uses, Sheringham has leisure, entertainment and cultural uses, including the Sheringham Little Theatre and Red Lobster Gallery as well as the Sheringham Museum which help to attract visitors to the town centre.

Sheringham town centre predominantly comprises the linear Station Road which stretches from Sheringham Station to the Sea Front. The town centre includes a Primary Shopping Area that incorporates the majority of Station Road as well as Church Street.

Respondents to the household survey were asked what would make you shop more often in Sheringham town centre. Of those who suggested improvements to the town centre, the majority of respondents mentioned improvements to parking and a better quality or a more diverse range of shops. The key results were:

- 5% of respondents would shop at Sheringham if it was closer to home;
- 4% of respondents wanted more/better car parking; and,
- 3% wanted a better choice of shops in general.

Based on Lichfields' site visit (September 2016) there are 6 vacant units within Sheringham town centre. The vacancy rate is 3.7% which is significantly below the national average (11.8%), suggesting demand for premises is strong. Zone A retail rents are relatively strong throughout the centre, as shown in Table D.3 below.

Table D.3 Sheringham Town Centre Zone A Retail Rents

Location	£ per sq.m
Station Road	275 to 308
Church Street	195 to 375
High Street	275 to 350

Source: Valuation Office Agency Business Rates

A significant proportion of the household survey respondents' travel by car for their food and non-food shopping with 89.3% of respondents travelling by car as driver or passenger for their main food shopping and 82.7% for their non-food shopping.

There are four car parks in proximity to the town centre including Chequers (34 spaces), Morris Street (115 spaces), Cliff Road (94 spaces) and Station Approach (294 spaces). Morris Street provides a limited number of 30 minute free car parking bays. The household survey indicates that car parking could be improved to further the health of the town centre.

The centre is reasonably served by buses, with bus routes from surrounding areas within the District and beyond and benefits from its own train station

E. Holt

Holt is a small Georgian town with a niche market for specialist gift shops and galleries. Holt is designated as a Principal Settlement with a Small Town Centre within the North Norfolk Core Strategy. It has a good range of retail and service uses, and acts as both a local service centre and a visitor destination. Its key roles include:

- *convenience shopping* - the main food store in Holt is a mid-sized Bugden's (1,033 sq.m net) which is supplemented by 13 small convenience shops. A new Aldi store is proposed and will improve food store provision in the town.
- *comparison shopping* - a good range of independent comparison goods retailers, comprising a high number of specialist/gift shops and galleries. There is also a small number of good quality multiple retailers including a Fat Face, Mountain Warehouse and a Joules. The Bakers & Larners department store acts as an important anchor store.
- *services* - including a tourist information centre, dry cleaners, shoe repairs, a number of hairdressers/beauty parlours and a good selection of cafés, restaurants and takeaways.
- *Leisure* - including the Red Dot Gallery, the Bircham Gallery and a Pilates Studio.

The household shopper survey results (Appendix 6) indicate that Holt is the main destination for 2.4% of respondents for non-food shopping and 1.3% for food shopping. Holt has the fifth highest market share in the District for non-food shopping and the sixth highest for food shopping.

Holt has a total of 164 Class A retail/service uses within the town centre boundary. This is the highest number for centres within the District, but many of the outlets are small. The diversity of uses is set out in Table E.1 and compared with the national averages.

Table E.1 Holt Town Centre Use Class Mix by Unit

Type of Unit	Units PSA/Town Centre 2016	% of Total Number of Units	
		Holt %	UK Average ⁽¹⁾
Comparison Retail	98	59.8	35.8
Convenience Retail	14	8.5	8.4
A1 Services ⁽²⁾	10	6.1	12.3
A2 Services ⁽³⁾	19	11.6	12.3
A3/A5	15	9.1	14.9
A4 Pubs/bar	1	0.6	4.5
Vacant	7	4.3	11.8
Total	164	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans.

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The centre has a significantly higher proportion of comparison units than the UK average. Conversely the centre has a lower proportion of A1 and A2 services and A3/A5 food and beverage outlets.

The proportion of vacant units is significantly lower than the UK average, which is reflective of the majority of centres within North Norfolk and indicates a strong demand for premises within the centre.

Holt has a strong selection of comparison units (98). The range and choice of comparison shopping is varied, and includes a distinctive and niche range of specialist gift shops and galleries. In addition, Holt has a reasonable selection of high end multiple retailers including a Joules, Fat Face and Mountain Warehouse.

Overall Holt has a relatively low proportion of services uses when compared with the national average, which is due to the large number of comparison shops. However Holt has a reasonable range and choice of non-retail service uses, with the majority of Goad categories represented. There is a concentration of estate agents within central area of the centre. Table E.2 provides a breakdown of service shop units by category.

Table E.2 Holt Town Centre Analysis of Selected Service Uses

Type of Unit	Holt Town Centre		% UK Average*
	Units 2016	%	
Restaurants/cafés	12	27.9	22.5
Fast food/takeaways	3	7.0	14.7
Pubs/bars	1	2.3	11.1
Banks/other financial services	10	23.3	11.8
Betting shops/casinos	0	0	3.8
Estate agents/valuers	9	20.9	9.1
Travel agents	1	2.3	2.2
Hairdressers/beauty parlours	6	14.0	22.7
Laundries/dry cleaners	1	2.3	2.1
Total	43	100.0	100.0
Other A1 Retail Services	2	n/a	n/a
Total	45	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans (June 2015)

Holt town centre is compact with a primary retail frontage focused around the Market Place. The centre is characterised by an attractive and historic environment.

The Site Allocations DPD identifies that the pressure on car parking spaces in Holt, and as a result inadequate spaces are available to accommodate both employees and visitors to the town centre.

Respondents to the household survey were asked what would make you shop more often in Holt town centre. Of those who suggested improvements to the town centre, the majority of respondents mentioned improvements to car parking and lower prices/cheaper shops. The key results were:

- 10% of respondents wanted more/better car parking;
- 5% of respondents would shop at Holt if it was closer to home;
- 4% of respondents wanted lower prices/cheaper shops;
- 3% wanted more food supermarkets; and,
- 3% wanted a better choice of shops in general.

These responses suggest that improvements to the amount and quality of parking should help to improve the number of visitors to Holt town centre.

There were 7 vacant units within Holt (September 2016) and the proportion of vacant units (4.3%) significantly below the national average (11.8%), suggesting demand for premises is strong.

F. Stalham

Stalham is a small market town located on the northern edge of the Norfolk Broads. Stalham is designated as a Secondary Settlement with a Small Town Centre within the North Norfolk Core Strategy. It has a limited range of retail and service uses, and functions as a local retail and service centre. Its key roles include:

- *convenience shopping* – the main food store in Stalham is a mid-sized Tesco food store (1,689 sq.m net), supported by 6 small convenience units within the centre.
- *comparison shopping* – there is a limited range of independent retailers. There is a Boots Pharmacy.
- *services* – a reasonable range of service units including hairdressers and a beauty salon, funeral directors, a dog groomer and a limited selection of cafés and takeaways.

The household shopper survey results (Appendix 6) indicate that Stalham is the main destination for only 0.9% of respondents for non-food shopping and 5.8% for food shopping in the study area as a whole. Stalham has the sixth highest market share in the District for non-food shopping, but the fourth highest for food shopping.

Mix of Uses and Occupier Representation

Within Stalham town centre's primary shopping areas there are 47 Class A retail/service uses. In the wider town centre area there are 73 Class A units. The diversity of uses is set out in Table F.1, compared against the national average.

Table F.1 Stalham Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Number of Units	
			Stalham %	UK Average ⁽¹⁾
Comparison Retail	18	29	39.7	35.8
Convenience Retail	6	6	8.2	8.4
A1 Services ⁽²⁾	9	14	19.2	12.3
A2 Services ⁽³⁾	1	4	5.5	12.3
A3/A5	6	10	13.7	14.9
A4 Pubs/bar	3	3	4.1	4.5
Vacant	4	7	9.6	11.8
Total	47	73	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The mix of uses is similar to the national average. The notable differences are the high proportion of Class A1 services e.g. hairdressers and the lower proportion of Class A2 services e.g. banks and financial services. The proportion of vacant units is just below the UK average,

but is higher than most other centres within North Norfolk, which indicates that demand for premises may be weaker in Stalham.

Stalham has a limited selection of comparison units (18). The range and choice of comparison units is predominantly small independent shops. The only multiple present is a Boots Pharmacy. Stalham has a limited range and choice of non-retail service uses. This includes a café, fast food/takeaways, pubs, estate agents, hairdressers, a beauty salon and funeral directors. There are no banks or building societies within the town centre. Stalham has recently lost two banks. There is only a mobile bank one day per week. Table F.2 provides a breakdown of service shop units by category.

Table F.2 Stalham Town Centre Analysis of Selected Service Uses

Type of Unit	Stalham Town Centre		% UK Average*
	Units 2016	%	
Restaurants/cafés	3	11.5	22.5
Fast food/takeaways	7	26.9	14.7
Pubs/bars	3	11.5	11.1
Banks/other financial services	0	0	11.8
Betting shops/casinos	1	3.8	3.8
Estate agents/valuers	3	11.5	9.1
Travel agents	0	0	2.2
Hairdressers/beauty parlours	9	34.6	22.7
Laundries/dry cleaners	0	0	2.1
Total	26	100.0	100.0
Other A1 Retail Services	5	n/a	n/a
Total	31	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans (June 2015)

As identified in the North Norfolk Core Strategy, Stalham is a small linear settlement on the Yarmouth to Cromer Road and on the Weavers Way long-distance path. The commercial area of the town centre is focused on the High Street and extends from the Tesco food store in the south east and to the junction of St John's Road and the High Street to the west. The centre includes a Primary Shopping Area which extends along the majority of the High Street. Respondents to the household survey were asked what would make you shop more often in Stalham town centre. Of those who suggested improvements to the town centre, a small proportion of respondents mentioned a better choice of shops in general (4%).

G. Wells-next-the-Sea

Wells-next-the-Sea is the smallest town in the District, which functions as a local service and tourist centre. The centre is located to the west of the District and is a popular tourist destination. Wells-next-the-Sea is designated as a Secondary Settlement with a Small Town Centre within the North Norfolk Core Strategy. It has a limited range of retail and service uses reflective of its size. Its key roles include:

- *Convenience shopping* - the main food stores in Wells-next-the-Sea is a small Co-op (614 sq.m net) which is supported by 12 small convenience shops.
- *Comparison shopping* - a reasonable range of independent retailers comparison within the centre.
- *Services* - a limited range of service units including a post office, tourist information centre, a hairdresser and a good selection of cafés, restaurants, takeaways.
- *Leisure* - including the Screen-next-the-Sea cinema which incorporates the Granary theatre, Quayside Gallery and the Staithe Gallery.

The household shopper survey results (Appendix 6) indicate that Wells-next-the-Sea is the main destination for only 0.4% of respondents for non-food shopping and 0.6% for food shopping in the study area as a whole. Wells-next-the-Sea has the second lowest market share in the District for non-food shopping and the equal lowest for food shopping.

Within the town centre primary shopping area Wells-next-the-Sea has a total of 71 Class A retail/service uses. In the wider town centre there are 82 Class A units. The diversity of uses is set out in Table G.1, compared with the national average.

Table G.1 Wells-next-the-Sea Town Centre Use Class Mix by Unit

Type of Unit	Units Within PSA	Total Town Centre Units	% of Total Number of Units	
			Wells-next-the- Sea %	UK Average ⁽¹⁾
Comparison Retail	37	39	47.6	35.8
Convenience Retail	12	13	15.9	8.4
A1 Services ⁽²⁾	3	4	4.9	12.3
A2 Services ⁽³⁾	4	6	7.3	12.3
A3/A5	13	16	19.5	14.9
A4 Pubs/bar	1	1	1.2	4.5
Vacant	1	3	3.7	11.8
Total	71	82	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The centre has a significantly higher proportion of comparison and convenience units than the UK average, and also a higher proportion of food and beverage A3/A5 units. The centre has a lower proportion of A1 and A2 services and A4 pubs/bars. The proportion of vacant units is significantly lower than the UK average, which is reflective of the majority of centres within North Norfolk and indicates a strong demand for premises within the centre.

Wells-next-the-Sea has a reasonable selection of comparison units (37). The range and choice of comparison shopping is varied, and includes the majority of GOAD categories. The comparison units are independents with no national multiple retailers present.

Wells-next-the-Sea also has a limited range and choice of non-retail service uses. There is a high proportion of restaurants/café, which reflecting the town's role as a tourist destination. Other service uses include a pub, amusement arcade, estate agents and hairdressers. Table G.2 provides a breakdown of service shop units by category.

Table G.2 Wells-next-the-Sea Town Centre Analysis of Selected Service Uses

Type of Unit	Wells-next-the-Sea Town Centre		% UK Average*
	Units 2016	%	
Restaurants/café	15	60.0	22.5
Fast food/takeaways	1	4.0	14.7
Pubs/bars	1	4.0	11.1
Banks/other financial services	1	4.0	11.8
Betting shops/casinos	0	0	3.8
Estate agents/valuers	4	16.0	9.1
Travel agents	0	0	2.2
Hairdressers/beauty parlours	3	12.0	22.7
Laundries/dry cleaners	0	0	2.1
Total	25	100.0	100.0
Other A1 Retail Services	1	n/a	n/a
Total	28	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans (June 2015)

Wells-next-the-Sea town centre comprises the narrow and linear Staithe Street and the frontage of the Quay. Wells-next-the-Sea does not have a defined Primary Shopping Area.

Respondents to the household survey were asked what would make you shop more often in Wells-next-the-Sea town centre. Of those who suggested improvements to the town centre, respondents mentioned more/better car parking (4.1%) and better choice of shops in general (3.7%).

The proportion of vacant units is significantly lower than the UK average, which is reflective of the majority of centres within North Norfolk and indicates a strong demand for premises within the centre.

H. Hoveton and Wroxham

Hoveton and Wroxham are two large villages on either side of the River Bure, which form one of the most important boating and tourism centres of the Norfolk Broads area. Hoveton is designated as a Secondary Settlement with a Small Town Centre in the North Norfolk Core Strategy. Hoveton and Wroxham are dominated by the Roys of Wroxham retail complex. Wroxham has a limited number of retail units and mainly provides access to boat moorings and car parks serving the centre. The combined centre provides a small range of shopping and other services for visitors and residents. Its key roles include:

- *convenience shopping* – the main food store in Hoveton and Wroxham is the Roys of Wroxham (4,708 sq.m net) which is supplemented by the Broads Centre Supermarket, a newsagent and 4 additional convenience units.
- *comparison shopping* – Roys of Wroxham plus a limited range of independent retailers.
- *services* – a limited range of service units including a tourist information centre, hairdressers and a good selection of cafés, restaurants, takeaways.

The household shopper survey results (Appendix 6) indicate that Hoveton/Wroxham is the main destination for only 0.3% of respondents for non-food shopping and 0.6% for food shopping in the study area as a whole. Hoveton/Wroxham has the lowest market share in the District for non-food shopping and the equal lowest for food shopping. These figures are indicative of the centre's dominant tourism rather than local shopping role. Hoveton/Wroxham has a total of 58 retail/service uses. The diversity of uses is set out in Table H.1, compared with the national average.

Table H.1 Hoveton/Wroxham Use Class Mix by Unit

Type of Unit	Units 2016	% of Total Number of Units	
		Hoveton/Wroxham %	UK Average ⁽¹⁾
Comparison Retail	22	37.9	35.8
Convenience Retail	7	12.1	8.4
A1 Services ⁽²⁾	6	10.3	12.3
A2 Services ⁽³⁾	7	12.1	12.3
A3/A5	13	22.4	14.9
A4 Pubs/bar	1	1.7	4.5
Vacant	2	3.4	11.8
Total	58	100.0	100.0

Source: Lichfields' Site Visit September 2016

(1) UK average for all town centres surveyed by Goad Plans

(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods

(3) incl. betting shops, tattoo parlours and laundrettes (sui generis)

The mix of uses is similar to the national average. The main differences are the high proportion of food and beverage (A3 – A5) outlets reflecting the centres role as a tourist destination and the low vacancy rate.

Hoveton/Wroxham is dominated by Roys of Wroxham, occupying a number of separate premises, including a department store, garden centre, toy shop and a DIY store. Roys is supplemented by a limited range of independent retailers.

Hoveton/Wroxham also has a limited range and choice of non-retail service uses, but the majority of Goad categories represented. There is a high proportion of restaurants/café, which reflects the town's role as a tourist destination. Other service uses include fast food/takeaways, pub/bars, amusements, estate agents, banks and hairdressers. Table H.2 provides a breakdown of service shop units by category.

Table H.2 Hoveton/Wroxham Town Centre Analysis of Selected Service Uses

Type of Unit	Hoveton/Wroxham		% UK Average*
	Units 2016	%	
Restaurants/café	9	36.0	22.5
Fast food/takeaways	4	16.0	14.7
Pubs/bars	1	4.0	11.1
Banks/other financial services	3	12.0	11.8
Betting shops/casinos	1	4.0	3.8
Estate agents/valuers	3	12.0	9.1
Travel agents	0	0	2.2
Hairdressers/beauty parlours	4	16.0	22.7
Laundries/dry cleaners	0	0	2.1
Total	25	100.0	100.0
Other A1 Retail Services	2	n/a	n/a
Total	27	n/a	n/a

Source: Lichfields' Site Visit September 2016

UK average for all town centres surveyed by Goad Plans (June 2015)

The North Norfolk Core Strategy identifies that the commercial and shopping centre of Hoveton extends principally from the bridge area along Norwich Road and some extent along Station Road. Hoveton/Wroxham does not have defined primary frontages. Hoveton and Wroxham are busy tourist destinations particularly in the Summer months.

Respondents to the household survey were asked what would make you shop more often in Hoveton/Wroxham village centre. Of those who suggested improvements to the town centre, respondents mentioned and better choice of shops in general (5.8%).

The proportion of vacant units is significantly lower than the UK average, which is reflective of the majority of centres within North Norfolk and indicates a strong demand for premises within the centre.

Appendix 6: Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 800 households across the North Norfolk study area in October 2016. The study area was split into eight zones, based on ward boundaries. In order to provide statistically reliable sub-samples 100 completed interviews were undertaken in each zone. The main aims of the survey were to establish patterns for the following:

- main food and top up grocery shopping;
- non-food shopping, including:
 - clothing and footwear;
 - domestic electrical appliances;
 - other electrical goods (TV, Hi-Fi and computers);
 - furniture, soft furnishing or carpets;
 - DIY/hardware items and garden items;
 - chemist, health and beauty items; and
 - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

Main Food Shopping

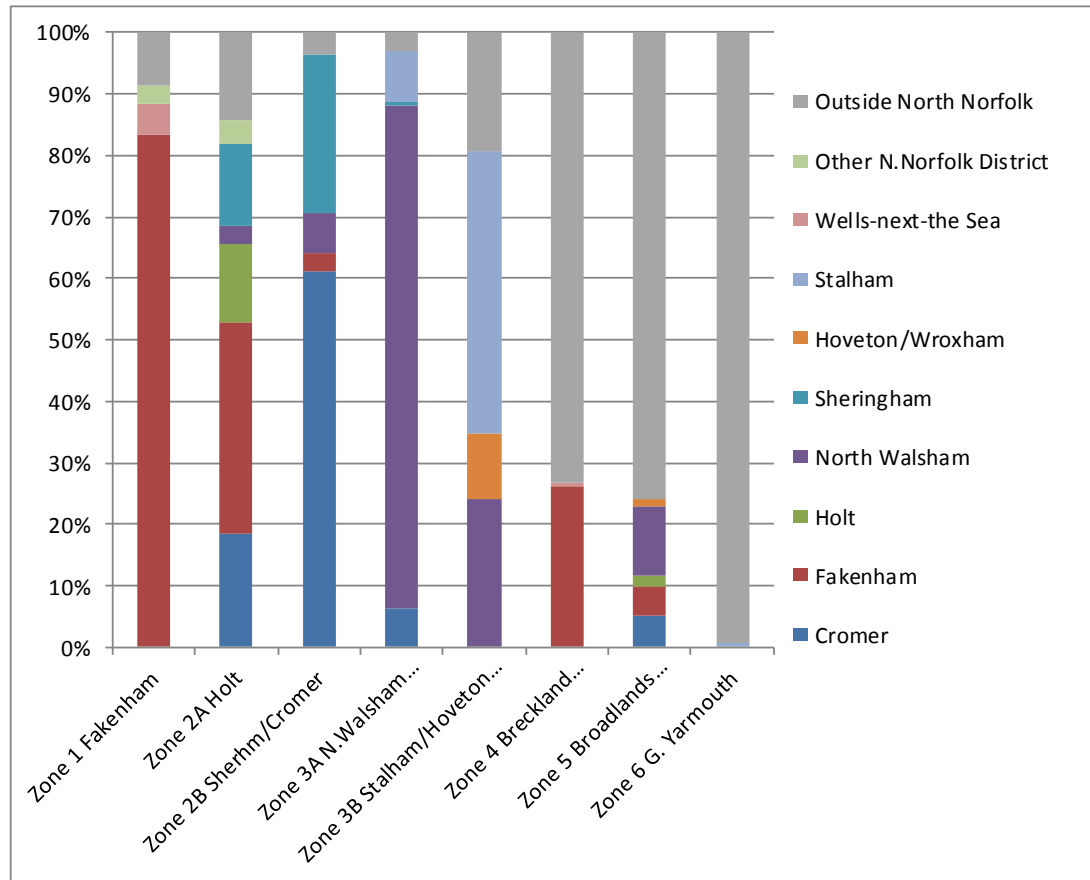
Respondents were asked where they last undertook their main food and grocery shopping.

The Sainsbury's store in North Walsham was the most popular destination within North Norfolk, attracting 9.9% of main food shopping trips for the study area as a whole, closely followed by the Morrison's store in Fakenham attracting 8.7% of trips and the Morrison's store in Cromer attracting 7.4% of trips. The internet was used by 6.1% of respondents. The market share of main food shopping (excluding internet shopping) for the main centres is shown in Figure A below.

Zone 3A (North Walsham) retains the highest proportion (97%) of main food shopping, followed by 96% in Zone 2B (Sheringham/Cromer). The retention rate is relatively high in all the core zones within the District i.e. Zones 1 to 3B. In the outer zones (4 to 6) most main food shopping trips are attracted to Norwich, Great Yarmouth or Aylsham.

During their most recent main food and grocery shopping 32% of respondents indicated that they linked this trip with other activities in the town centre, of these respondents, 33% undertook non-food shopping in the town centre, 23% used other services (e.g. bank, post office, hairdresser etc.) and 11% for social or leisure activities. These results demonstrate the importance of the role of large food stores as anchors, attracting spin-off trade for other businesses in the town centres.

Figure A Main Food Shopping



Source: NEMS Household Survey October 2016

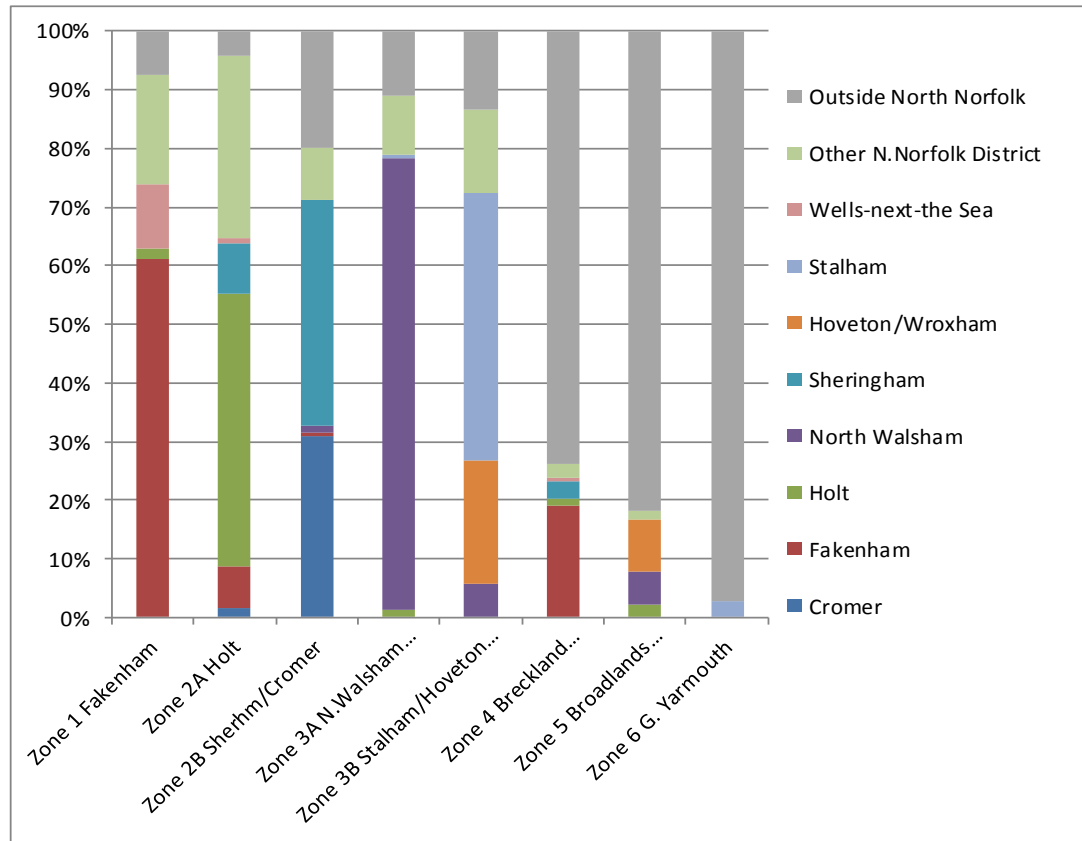
Top-Up Food Shopping

Over 83% of respondents undertake top-up food shopping trips made to supplement main food shopping trips. These top-up shopping trips are usually undertaken on a more frequent basis for perishable items such as bread and milk. The market share of top-up food shopping for each centre is shown in Figure B below.

The primary destinations for top-up trips were: Sainsbury’s in North Walsham (4.8%), Tesco in Sheringham (4.3%), Tesco in Stalham (4.3%), Morrison’s in Fakenham (2.5%) and Morrison’s in Cromer (2%). However the patterns of top-up food shopping are more diverse than for main food shopping, with a wide range of stores/local shops each capturing a small overall market share.

As with main food shopping, the retention rate is relatively high (over 90%) in all the core zones within the District i.e. Zones 1 to 3B. In the outer zones (4 to 6) most top-up food shopping trips are attracted to Norwich, Great Yarmouth or Aylsham.

Figure B Top Up Food Shopping



Source: NEMS Household Survey October 2016

Non-Food Shopping

Respondents were asked in which location they buy most of their household’s non-food shopping. For the study area as a whole, Norwich was the most popular destination with nearly 43% of all respondents doing most of the non-food shopping there, followed by the internet (11.5%) and Great Yarmouth (6.4%). Kings Lynn was 3.2%.

Within North Norfolk the most popular destinations for non-food shopping were: Fakenham (6.1%), Cromer (5.1%) and North Walsham (4.2%), followed by Sheringham (2.9%) and Holt (2.4%). This demonstrates that two of the most popular destinations are outside the District and over 50% of non-food shopping is carried out outside the district.

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share (excluding internet shopping) for each non-food goods category within North Norfolk is shown in the graphs below and overleaf. The influence of Norwich, Great Yarmouth, Kings Lynn and Aylsham outside the district is clearly evident, particularly for clothes/fashion shopping.

Figure C Clothing and Shoes

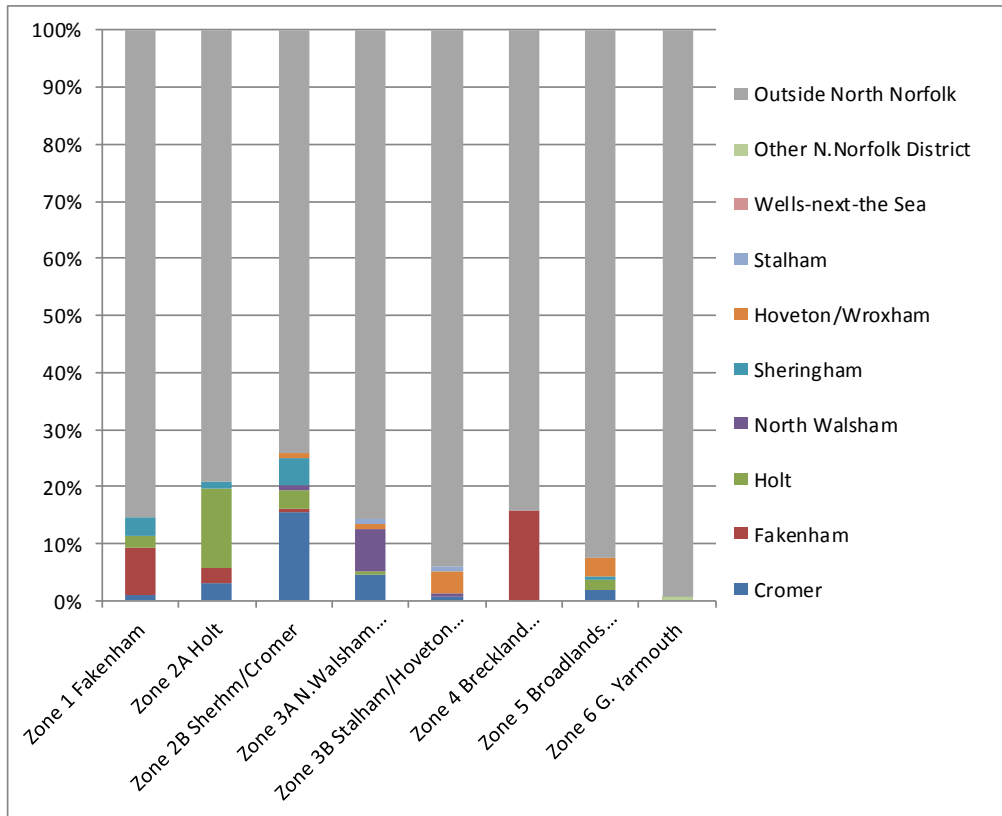
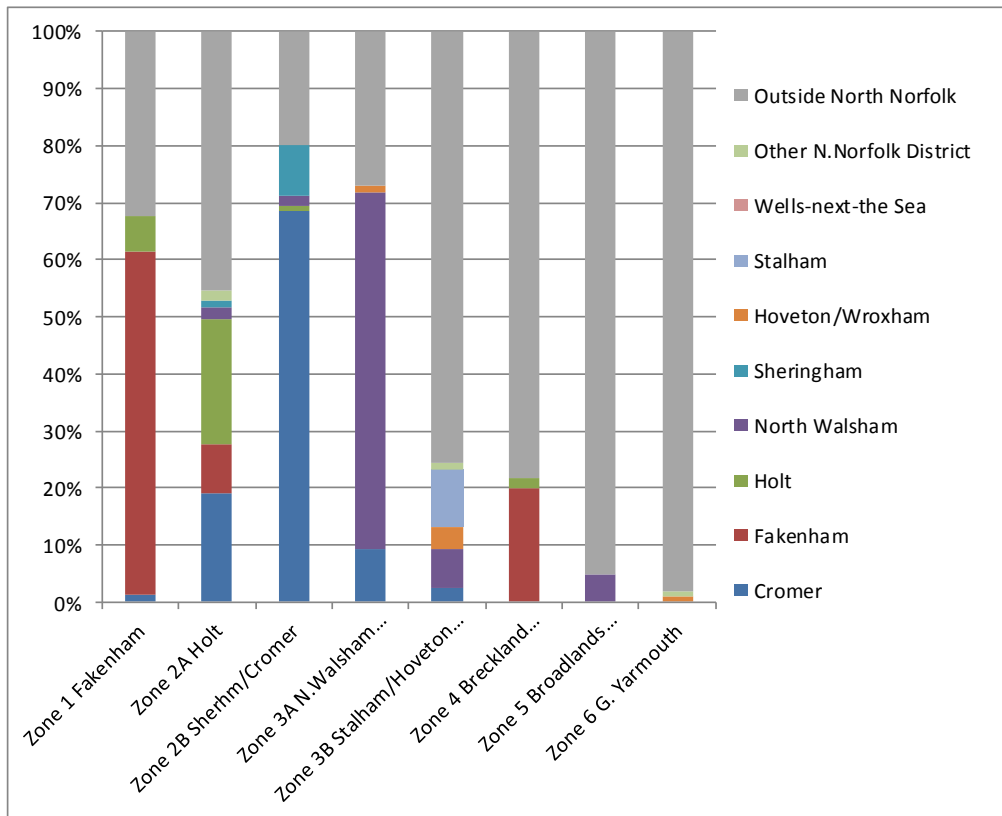


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey October 2016

Figure E Other Electrical Goods

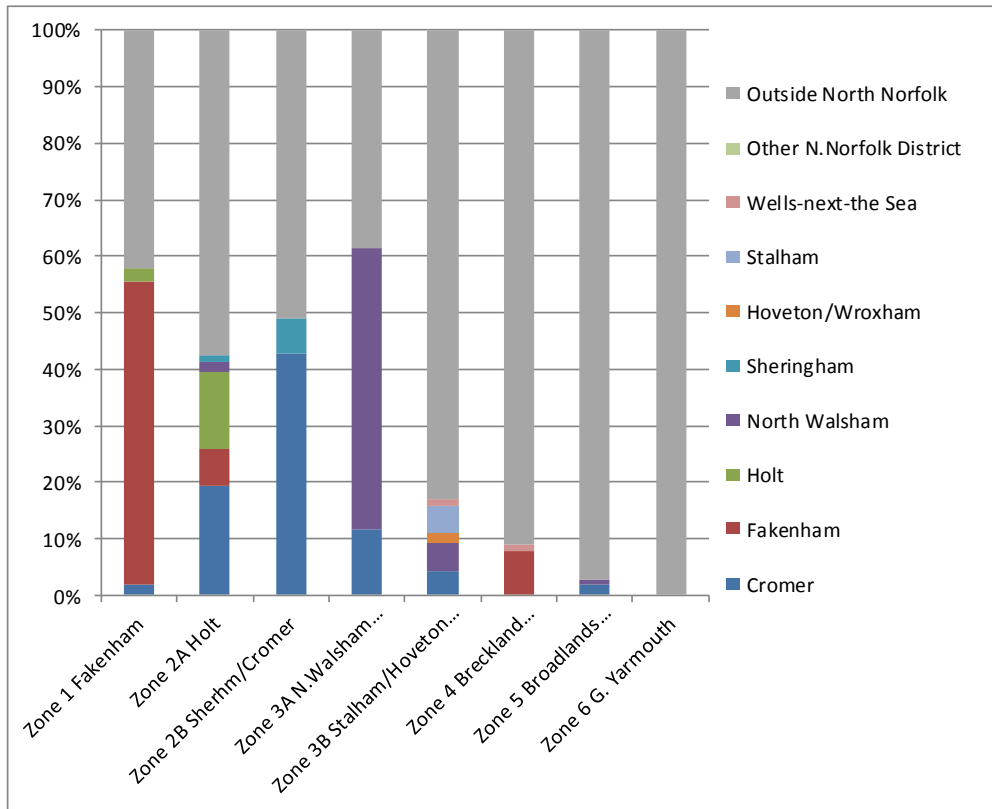
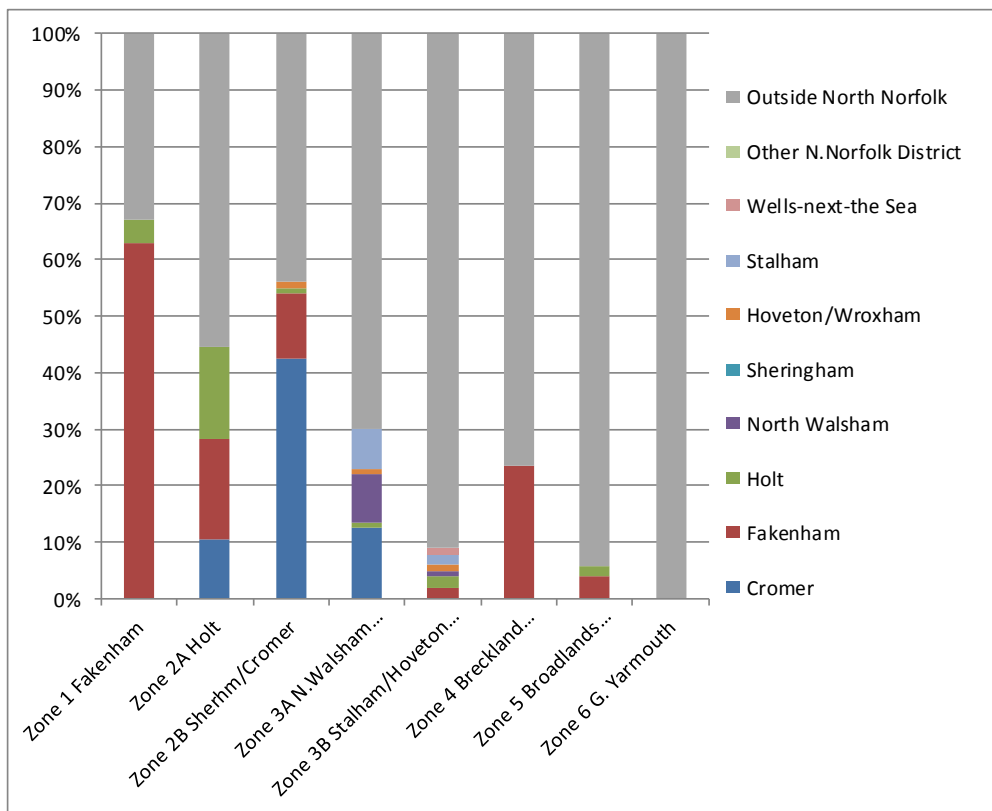


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey October 2016

Figure G DIY, Hardware and Garden Items

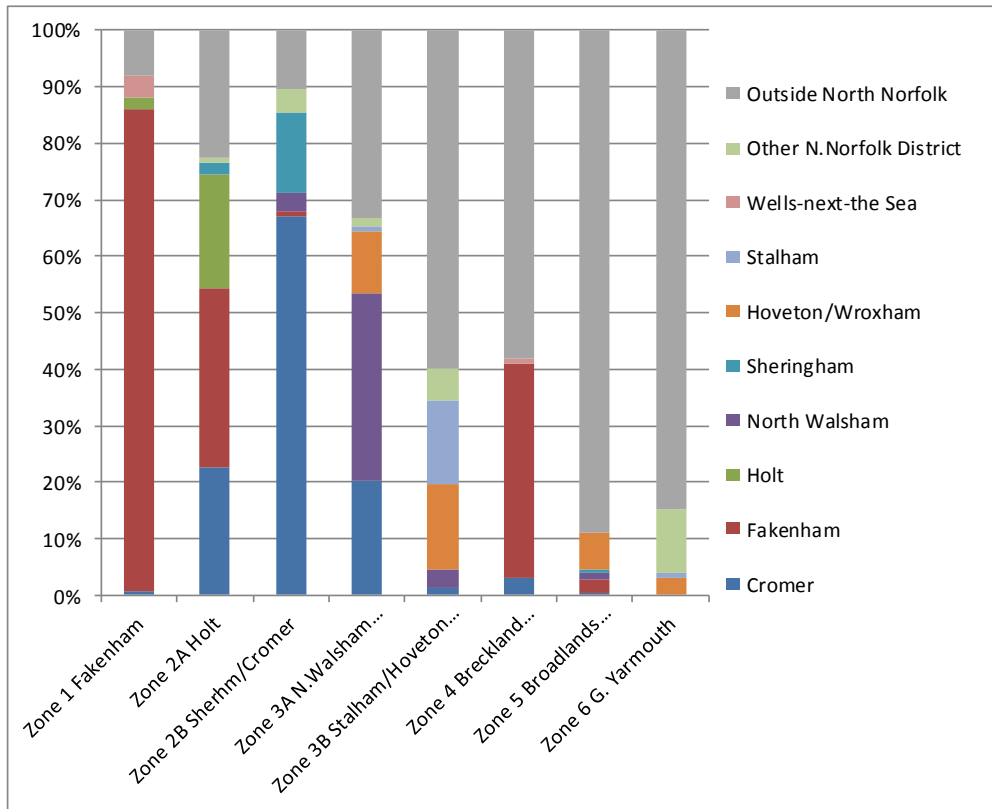
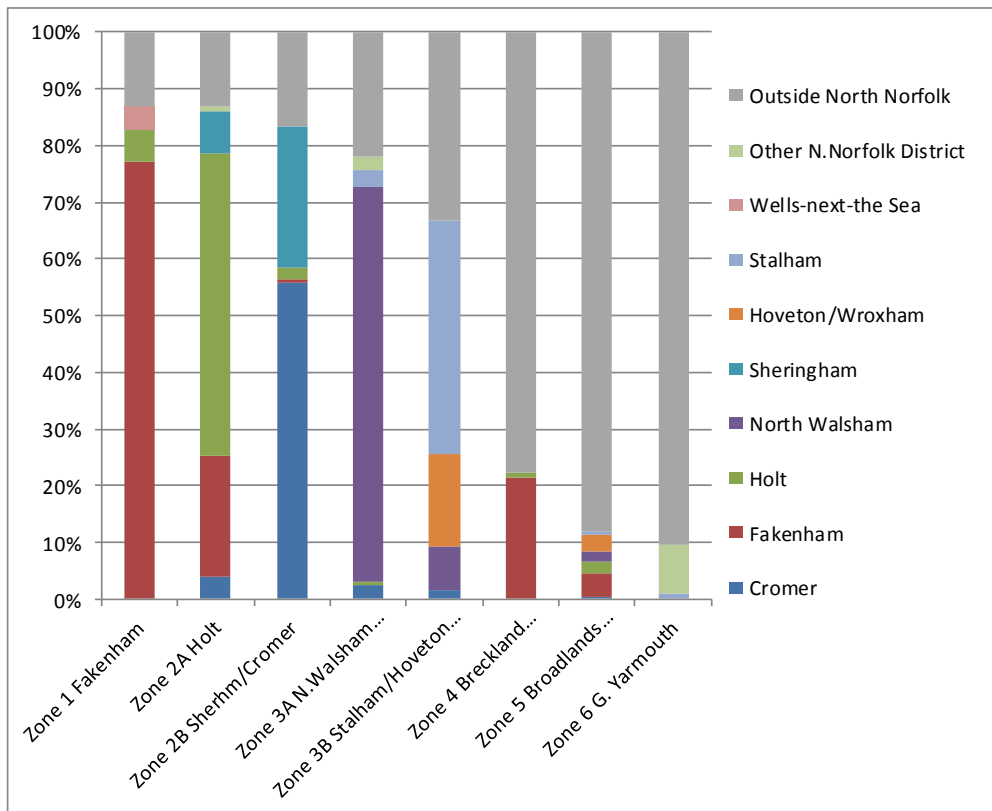
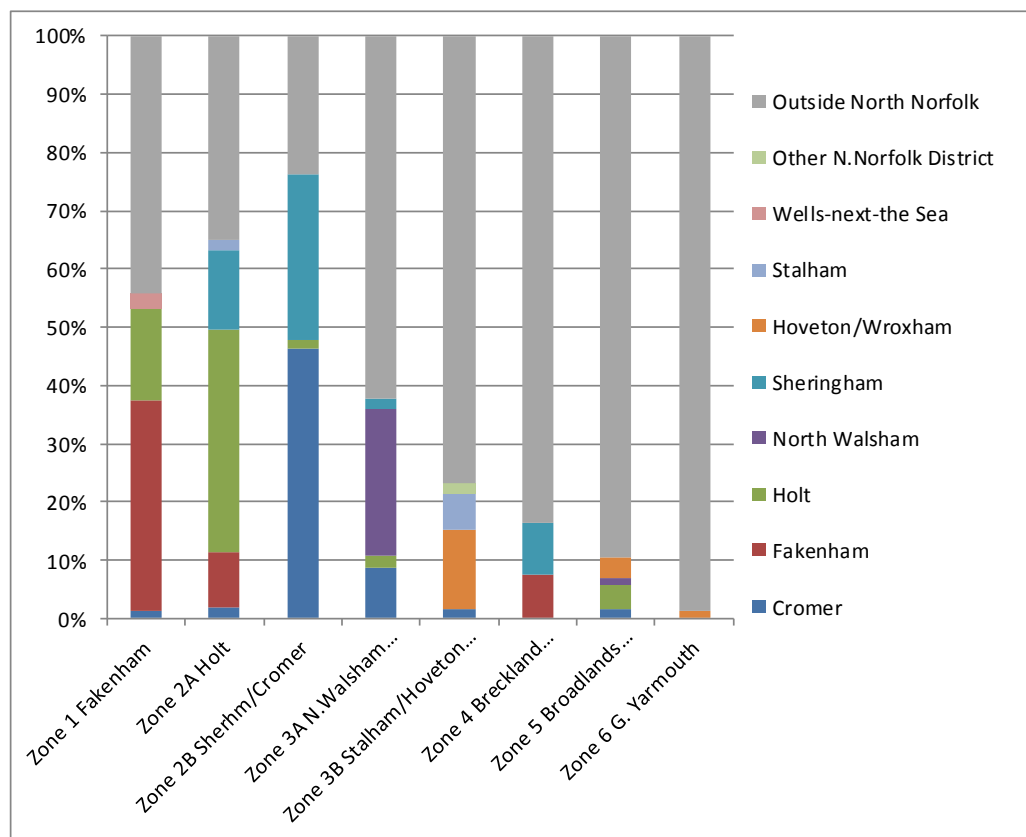


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey October 2016

Figure I Books, CDs, Toys and Gifts



Source: NEMS Household Survey October 2016

Mode of Travel for Shopping

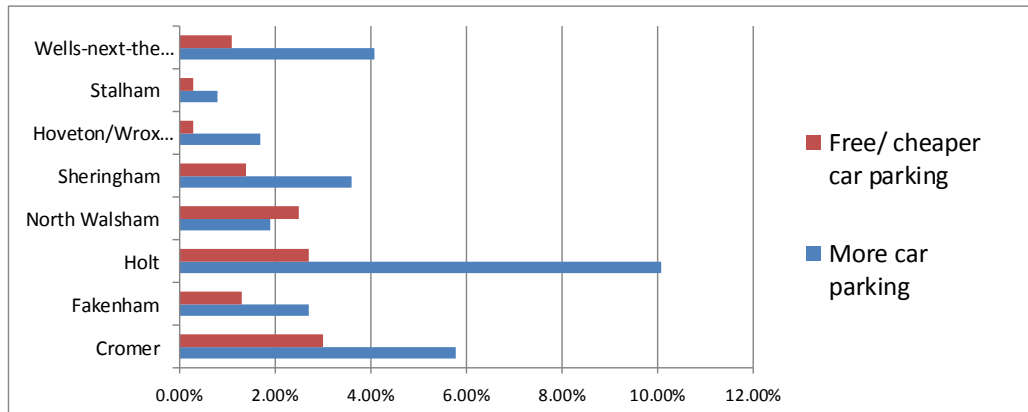
In the whole study area, over 89% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger). Based on Lichfields’ similar surveys across the country this high car usage is common for a predominantly rural district. A small proportion walk to their main food shopping destination (4.6%) and only 1.9% travel by bus (1.3%).

Car usage is slightly lower for non-food shopping with 83% of respondents indicating they travel by car. More respondents travel by bus (5.5%) for non-food shopping and 6.6% walk.

Shoppers’ Views

The household survey asked respondents what would make them visit the eight main centres more often. A high proportion (over 70%) of respondents indicated that “nothing” would make them shop more often within each town. These respondents were predominantly in non-local zones, suggesting the distance from home is a key factor in determining whether residents will visit each centre. As a result the proportion of respondents mentioning each suggested improvement is relatively low i.e. less than 5% of all respondents within the study area. Most responses related to the amount and cost of car parking, the choice of clothing shops, the choice of shops in general, the quality of shops and choice of independent shops. The results for these main responses are shown in Figures J to x below.

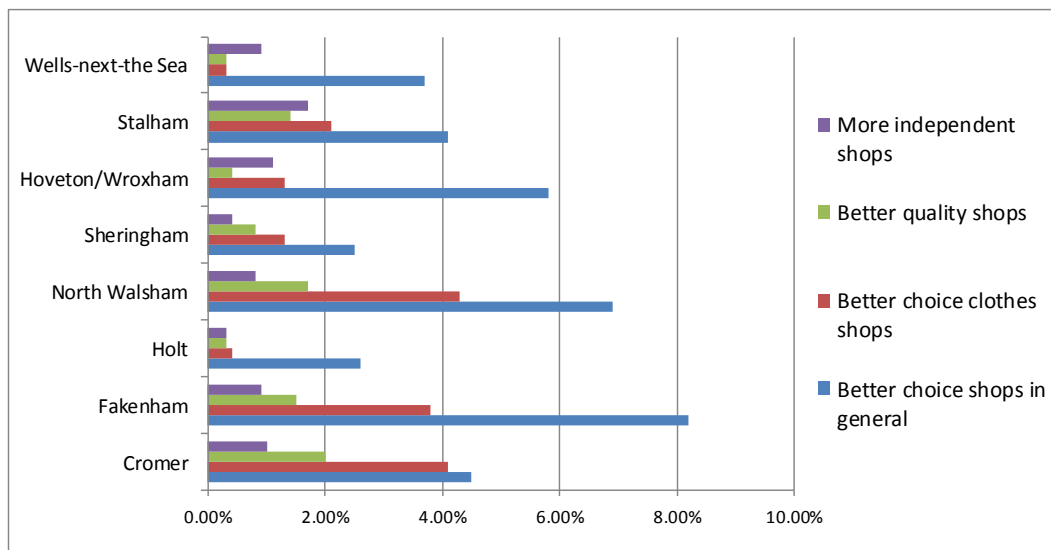
Figure J Car Parking Related Issues Mentioned by Respondents for Each Town



Source: NEMS Household Survey October 2016

The amount of car parking available appears to be more of an issue in Holt, and to a lesser extent Cromer than the other towns. The need for free or cheaper car parking was generally mentioned by fewer respondents for all centres except North Walsham.

Figure K Shopping Related Issues Mentioned by Respondents for Each Town



The number of respondents suggesting improvements to shopping provision is not related to the size of centre. Fakenham and Cromer are larger centres but recorded some of the highest numbers of respondents mentioning potential improvements. These results could indicate that respondents expectations are lower in smaller centres and/or improvements within smaller centres are less likely to make people shop more often in that town.

Other responses recorded by at least 3 people in each town are summarised below.

Fakenham: in addition to the results shown in Figures J and K, 1.5% of respondents mentioned improved bus services and 1.4% mentioned less charity shops.

Cromer: 2.3% of respondents mentioned improved traffic management/one-way system and 1% mentioned improved bus services.

Holt: 4.2% of respondents mentioned lower prices/cheaper shops and 2.9% mentioned more food supermarkets.

North Walsham: 0.9% of respondents mentioned less charity shops and 0.9% mentioned more large shops.

Sheringham: 0.6% of respondents mentioned more pedestrianised/ traffic free areas.

Stalham: 0.4% of respondents mentioned less charity shops.

Wells next-the-Sea: 0.8% of respondents mentioned lower prices/cheaper shops and 0.4% more pedestrianised/ traffic free areas.

Hoveton/Wroxham: 0.6% of respondents mentioned more pedestrianised/traffic free areas and 0.4% lower prices/cheaper shops.

Leisure Activities

The household survey asked respondents what leisure activities their family participate in as shown in Figure L. The destinations for the four main activities are shown in Figure M to X.

Figure L Leisure Participation Rates within the Study Area

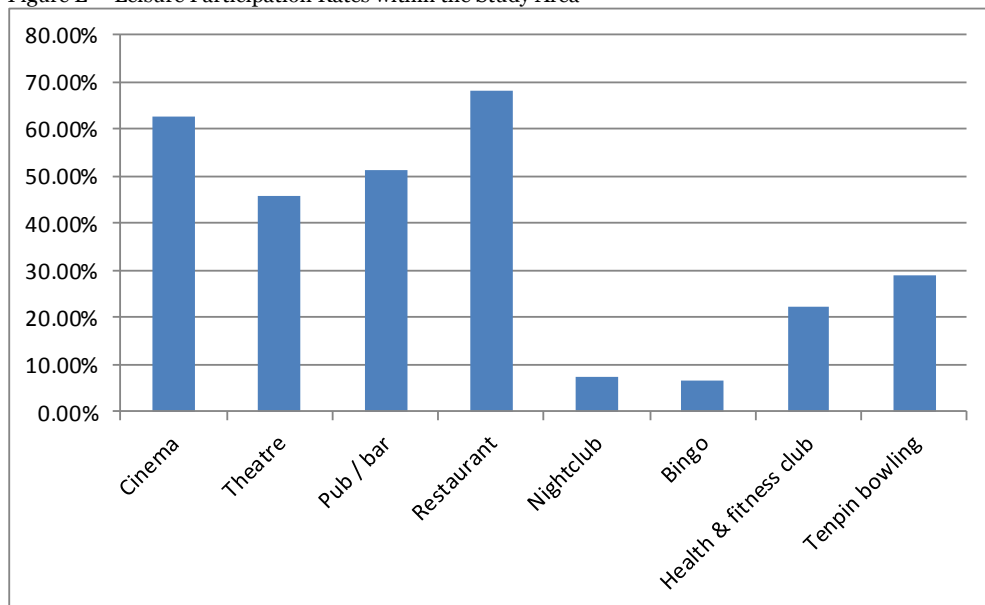


Figure M Cinema Destinations

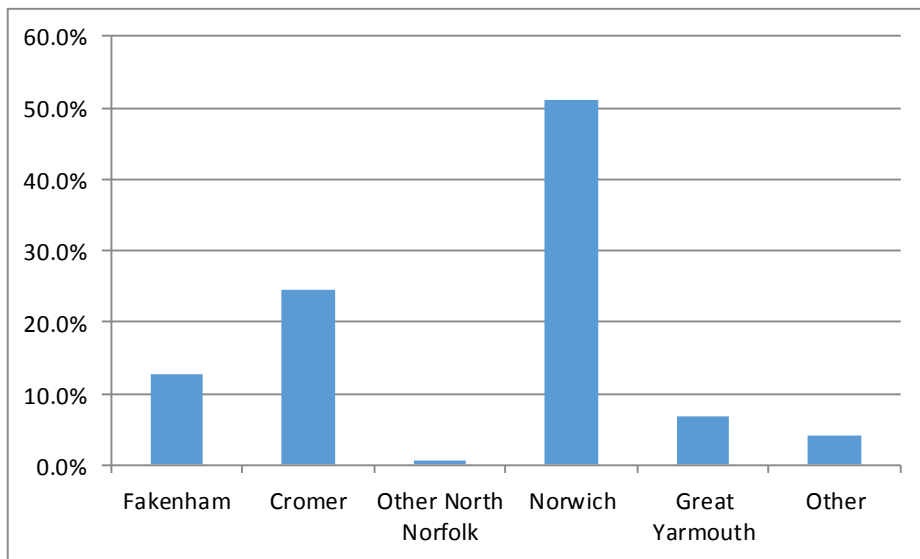


Figure N Theatre Destinations

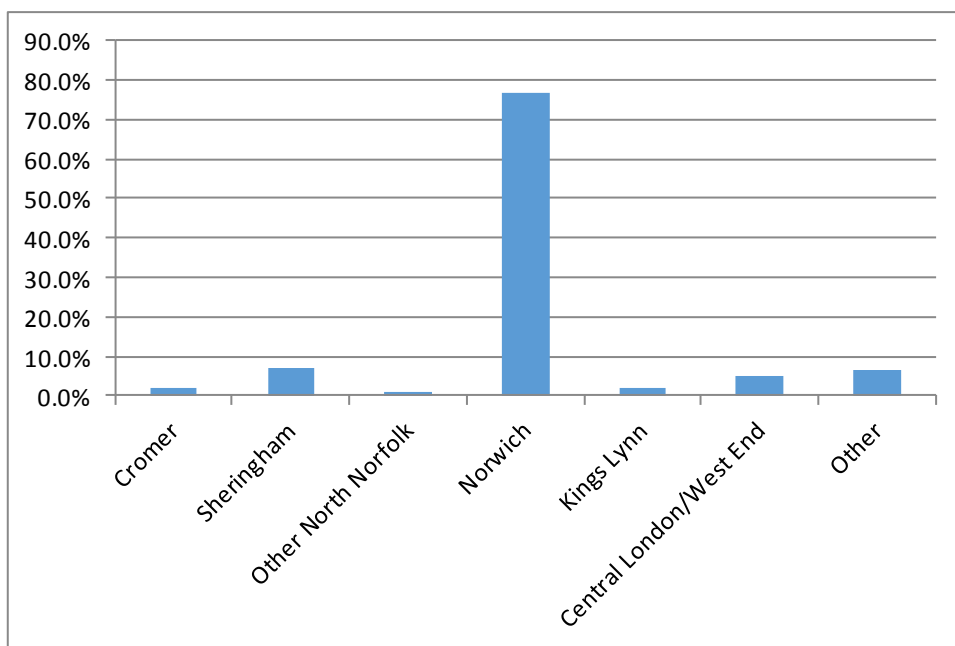


Figure O Pub/Bar Destinations

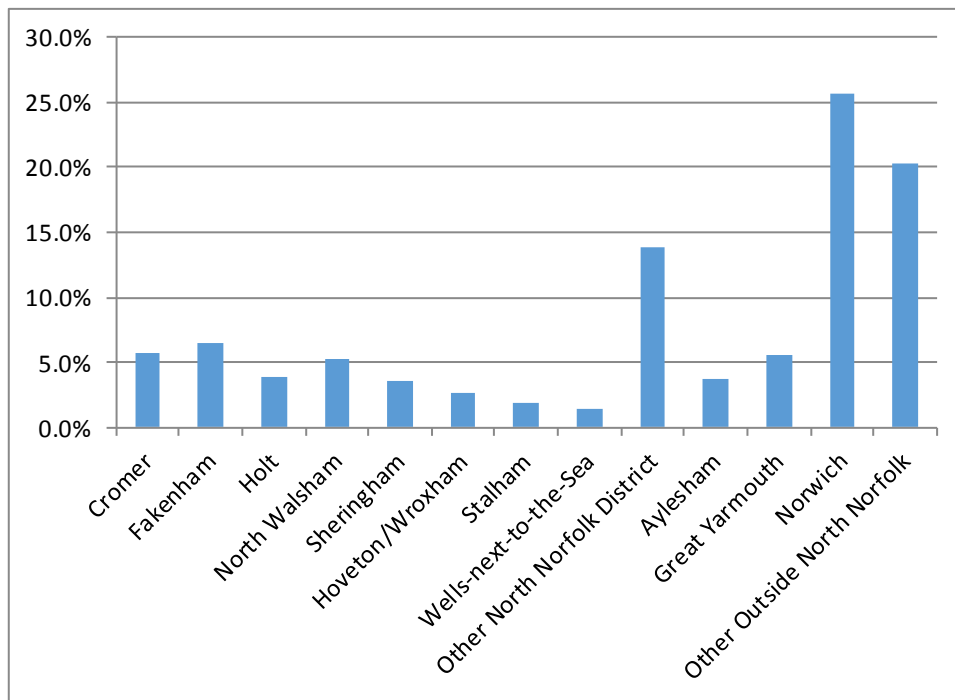
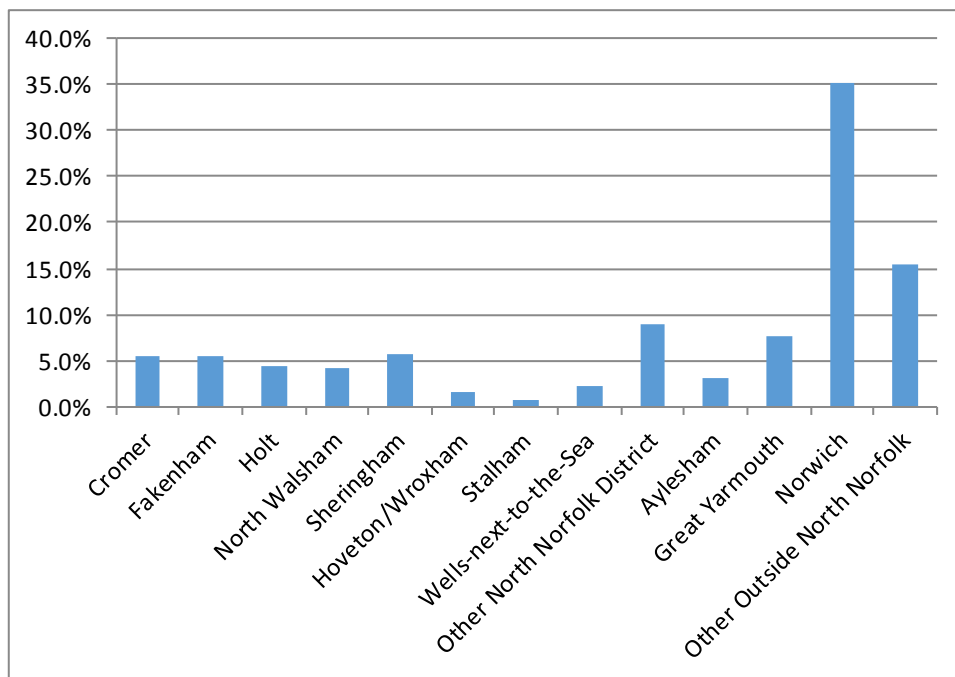


Figure O Restaurant Destinations



Bristol
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