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Report

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Greater Norwich Employment, Town Centre & Retail Study Strategy Advice

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For and on behalf of GVA Grimley Limited

1. Introduction

- 1.1 This paper provides the strategic conclusions and recommendations from the Greater Norwich Economy, Town Centres and Retail Study. It draws on the quantitative analysis provided within the separate Retail Needs and Employment Land Assessments as well as the comprehensive baseline report to provide a set of qualitative and strategy approaches to managing the process of growth within the sub-region.
- 1.2 What is clear from both technical reports is that Greater Norwich is well positioned to achieve significant levels of growth that can support the rejuvenation of Norwich city centre and the ongoing success of the constellation of town centres and employment sites that surround it.
- 1.3 However, it is also clear that success isn't guaranteed and a series of investments and interventions will need to be made to realise the potential, building on the strong set of assets already present and diversifying the range of activities and premises offered to attract new occupiers.
- 1.4 Delivering growth will also require choices to be made and a clear strategy articulated that creates confidence and certainty in the property and occupier market. This paper is intended to help inform those debates by aligning current policy approaches with the needs and demands of commercial occupiers.
- 1.5 This paper, however, does not provide a singular strategy, instead it seeks to provide decision makers with the information necessary to both direct and react to development and growth proposals that should help maximise Greater Norwich's potential. The key focus is on ensuring the fundamentals are in place in each location to ensure that, however the economy changes in the future, Greater Norwich's economic centres are robust enough to adapt and continue to thrive.

2. Strategic Needs and Policy Approaches

The Growth Potential of Greater Norwich

Employment Land

- 2.1 The detailed assessment of the Greater Norwich sub-region set out within the Employment Land Assessment confirmed the considerable potential of the area in the future to achieve significant levels of economic growth based on an assessment of the key economic assets and drivers within the Greater Norwich economy.
- 2.2 Overall, the Employment Land Assessment identifies a range of sectors that will drive economic and employment growth, many of which are within high value sectors that are increasingly important to the UK economy more widely. With a strong foundation of academic and commercial research, an increasingly entrepreneurial economy, a base of internationally recognised businesses and a diverse property portfolio Greater Norwich is well positioned nationally (and potentially internationally) to compete for future business investment as well as continuing to grow its own business base.
- 2.3 These strengths suggest that the growth potential of Greater Norwich extends beyond 'business as usual' base growth which forms the underpinnings of the base forecast provided by the EEFM. The base forecast suggests B class employment growth of c.11,700 FTE jobs, demand for c.250,000sqm of B class floorspace to accommodate these jobs and a total requirement (including allowances for churn and windfall) of 75ha.
- 2.4 Based on GVA's assessment of Greater Norwich's economic potential and capacity an 'enhanced' growth scenario has been identified which projects that, by 2036, the area could accommodate over 20,000 additional Full Time Equivalent (FTE) jobs within B class sectors, generating a requirement for over 440,000sqm of additional floorspace and a potential need for 114ha of employment land (including an allowance for churn and windfall).
- 2.5 Importantly for Greater Norwich much of this growth potential is underpinned by opportunities within knowledge intensive industries, suggesting that the economy is likely grow both in terms of levels of employment and its value. This will have subsequent impacts on the demand for skilled labour which the area will need to address if this expected growth is to be secured.
- 2.6 It is worth noting that the growth forecasts within the Employment Land Assessment are based solely on an understanding of the strategic growth opportunities of sectors themselves, both at the local level and driven by macro-economic trends. Forecasts have not be aligned with projections of population growth and change within Greater Norwich to test the impacts this may have on future employment needs.

- 2.7 The base model used to develop the assessment of future employment growth in Greater Norwich (the EEFM) does include an assumed level of population growth within the projections (in line with ONS Mid-Year Estimate projections) to balance jobs growth, labour supply and migration. However, this does not necessarily align with the population projections used to underpin the sub-regions objectively assessed housing needs and therefore could underestimate the needs for employment space arising from population driven sectors and activities.
- 2.8 In theory, this may increase the requirement for employment land across the Greater Norwich area, requiring additional land to be allocated in addition to the 114ha identified through economic projections alone. Alongside an increase in quantum of land, the location of housing and population growth will impact on where additional floorspace may be required, ensuring space is delivered in locations that enable sustainable servicing of major new settlements.
- 2.9 Demand for employment land may be further expanded by the range of other employment generating non-B class uses which may need to be accommodated in the future, ranging from transport depots, waste facilities or large quasi-retail activities such as car showrooms. These demands or requirements cannot be forecast in the same way as B class activity, however it is worth considering any demand they create would be in excess of the 114ha mentioned above.
- 2.10 In order to help address the potential 'over supply' of employment land the Employment Land Assessment has identified a small number of sites and clusters that are likely to provide the most appropriate assets and attributes to attract different growth sectors and activities. Based on the site reviews undertaken as part of the Employment Land Assessment process and GVA's understanding of occupier requirements these sites have been identified on the basis of their:
- General location (e.g. city centre, large business park, town centre etc).
 - Connectivity and accessibility;
 - Proximity or links to research institutions;
 - Proximity or links to existing businesses;
 - Proximity to other sector drivers (e.g. the airport);
 - Quality and nature of offer; and
 - Access to amenities and wider services for workers.

- 2.11 In different combinations and with different emphasis for each type of activity these fundamentals form the basis of strong economic locations that, even as sectors change are likely to continue to provide a strong foundation for business activity.
- 2.12 Based on our analysis of the existing and potential employment land supply the key assets within Greater Norwich that should form the focus of future economic activity include:
- Norwich Urban Area
 - Norwich City Centre
 - Airport Business Park (both the existing and allocated sites)
 - Norwich Research Park
 - Broadland Business Park
 - South Norfolk
 - Diss
 - Hethal and Wymondham
 - Broadland
 - Food Enterprise Zone, Honingham
 - Rackheath

Retail Needs

- 2.13 The Retail Study confirmed that the GNDP will need to positively plan for the development of additional comparison (non-food) goods floorspace over the course of the new GNLP period. Retail needs are forecast over the GNLP period to 2037 but it is advised that, owing to the rapidly changing nature of the retail sector, plus less longer term certainty over expenditure growth rates and other inputs into the quantitative need assessment, figures beyond 2027 are only considered indicative and should be reviewed and updated throughout the Plan period. Accordingly it is recommended that the identified comparison goods need figures to 2027 are used to inform the new GNLP.
- 2.14 The Retail Study identifies the following levels of comparison goods floorspace should be planned for:

	Comparison goods need at 2027 (sq.m net)	Indicative comparison goods need at 2037 (sq.m net)
Norwich urban area* comparison goods requirement	11,100 – 15,000	44,100 – 53,700
Rural South Norfolk comparison goods requirement	2,300 – 2,800	6,500 – 7,800
Rural Broadland comparison goods requirement	400 – 500	1,300 – 1,600

**includes those parts of the Norwich urban area which fall within Broadland and South Norfolk authority areas. All figures are cumulative and rounded.*

2.15 The Retail Study identifies that the following levels of convenience goods floorspace should be planned for:

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

**includes those parts of the Norwich urban area which fall within Broadland and South Norfolk authority areas. All figures are cumulative and rounded.*

2.16 Because of the extensive 'pipeline' of committed and planned convenience (food) goods floorspace, there is no identified quantitative need for any new convenience goods floorspace for the Norwich urban area. However, there are instances where a qualitative need exists for improvements to provision. These are discussed in the relevant centre-specific strategies set out below.

Diverse Needs Require a Differentiated Employment Space Offer across Greater Norwich

2.17 What is clear from the assessment of future growth potential is that the Greater Norwich economy will continue to provide for a broad range of businesses and activities which, in turn

requires a diverse portfolio of sites and premises to be available to attract and accommodate these.

- 2.18 At the simplest level the future portfolio of sites will need to be geared to providing the appropriate conditions for either office, industrial or warehouse occupiers. As explored in the Employment Land Assessment it is likely that these broad use classes, based on their core locational drivers, will seek to occupy certain locations and sites within Greater Norwich that meet their needs. For example demand for standalone warehouse space will need to be met within large sites which provide good access to the trunk road network whilst office occupiers will seek high quality locations which offer good public and private transport accessibility to their workers.
- 2.19 However, thinking in these broad terms only provides the starting point for planning future growth and ensuring opportunities are in place to meet all potential needs. Different businesses/activities within a single sector (let alone different sectors themselves) will seek to occupy different locations and types of space, it is therefore critical that, to harness its economic potential, Greater Norwich maintains and expands its current offer and ensure it provides both land and floorspace typologies that future activities will need.
- 2.20 Within this paper we consider the potential roles of the major business and research parks, Norwich city centre, the network of town centres and the rural hinterland in meeting the needs of likely future demand. It moves beyond the quantitative analysis of the Employment Land Assessment to identify broader factors that can help Greater Norwich fulfil its economic potential.
- 2.21 The Employment Land Assessment has identified that the majority of existing stock is fit for purpose and will continue to meet the needs of current businesses and also some level of future growth, however it is clear that to accommodate the scale and diversity of projected need further sites will be required that offer the particular conditions for key sector growth. As explored within the Employment Land Assessment (table 46, page 110) this potentially sets a clear need to focus on bringing forward a number of key sites that offer the most appropriate proposition for the core growth sectors.
- 2.22 It is critical for Greater Norwich to have this focus on employment land assets that are most likely to be attractive to future occupiers given that the Employment Land Assessment indicates that if all allocations and potential sites are considered the Greater Norwich area could offer a significant oversupply of development land earmarked for employment activity.
- 2.23 Focusing future efforts and attention on those sites that offer the conditions that best align with the requirements of likely occupiers within the key growth sectors will provide a clear message

(or set of messages) to developers and occupiers. It will also allow the development proposition to be refined to best meet what the likely form of demand will be.

2.24 Clearly, there are likely to be significant fluctuations and changes within the Greater Norwich economy over the 20 year plan period that may change the specific nature and sectoral mix of the area. However, despite activities changing the fundamental requirements of business locations are likely to remain broadly consistent over the long term, even where there may be short term variations.

2.25 In the main locations with strong infrastructure and accessibility fundamentals that provide a strong amenity offer have continued to be attractive to the majority of business occupiers, regardless of broader economic shifts. As the economy becomes more focussed on talent and the ability to move goods or information efficiently these attributes will be in even greater demand.

2.26 As such it is clear that a number of locations across Greater Norwich present a strong investment proposition, but also one that has presents opportunities for particular types or scales of development. Based on our analysis of both the portfolio of sites and future sector growth a broad pattern emerges between locational opportunities and activity types which lead to particular development typologies potentially being required:

- Large business / science parks – corporate/back office, R&D
- Trunk road sites – logistics/distribution, large scale production/engineering
- Standalone/isolated locations - specialist research and product development, specialist manufacturing
- City centre – corporate/shared office spaces, co-working, mixed use and live work
- Town centres – smaller, professional services

Future Retail Provision Needs Careful Planning to Support Existing Centres

2.27 The GNDP authorities should ensure that the core retail functions of Norwich city centre, the Main Towns, and network of other policy-defined centres are protected and where possible enhanced. This should include protection of active frontages in defined primary/secondary shopping frontages to ensure a critical mass of footfall-generating activity is retained. Article 4 directions should be introduced to protect the core retail functions across the network of centres (see discussion below).

2.28 The identification of sites to meet the retail and commercial leisure needs which the Retail Study has identified should be subject to the sequential test. In accordance with paragraphs

23-24 of the NPPF, the quantitative needs which the Retail Study identifies should be directed towards in-centre locations in the first instance, followed by appropriate and well-connected edge-of-centre sites.

- 2.29 Planning applications for the development of retail, commercial leisure or other 'main town centre' uses (as defined by the NPPF) which are not within a defined centre will need to demonstrate compliance with the sequential and impact 'tests' set out at paragraphs 24-27 of the NPPF.
- 2.30 The quantitative need forecasts which the Retail Study identifies should be reviewed throughout the GNLP period. Forecasts beyond 2027 should be considered indicative only: key inputs into the quantitative need assessment such as population, expenditure growth rates and 'special forms of trading' will invariably change according to economic fluctuations and new growth forecasts.

Impact assessment threshold

- 2.31 An impact assessment threshold of 500 sq.m (gross) should be applied to all proposals for new convenience and comparison goods retail proposals outside of a defined centre. This threshold is applicable to centres at all levels in the GNLP hierarchy of centres. The justification for this approach is as follows:
- In relation to convenience retail provision, there is a wide range of store sizes, from large supermarkets to a large number of stores which are sub-1,000 sq.m gross and are located in Main Towns, large district, district and local centres. Indeed many convenience stores in these smaller centres do not extend beyond 400-500sq m gross. In many cases, particularly in district and local centres, small foodstores provide an important contribution to the health of centres and in some cases provide an anchor role. In many cases they are also the largest units in district and local centres.
 - Therefore it is considered that a trigger point of 500 sq.m gross for retail proposals involving the potential sale of convenience goods should be applied across the GNLP area. This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace. This threshold should apply consistently across the whole of the GNLP urban area for both edge of centre and out of centre locations.
 - In relation to comparison goods provision, whilst single comparison goods retailers do not provide a lone sole anchor to defined centres, the range and quality of comparison goods retailers provides a very important contribution to the health and attractiveness of a centre. With such a range of retailers present across the GNLP area it is difficult to be precise over the exact scale of floorspace which could have a detrimental impact upon

the health of defined centres. However given trends in the retail sector in recent years and the evolution of the retail warehousing sector, we consider that floorspace of trigger of 500 sq.m gross should be applied to impact assessments for comparison goods floorspace.

- This should apply to new stand-alone retail floorspace, proposed extensions to existing stores and applications to vary the range of goods to be sold from existing floorspace. In addition, this threshold should apply to bulky and non-bulky goods proposals and, like convenience goods uses, be applied consistently across the whole of the GNDP area for both edge of centre and out of centre locations.

Article 4 directions

- 2.32 An important change since the 2007 Study which the GNDP will need to take account of are recent changes to permitted development rights. In particular, the Town and Country Planning (General Permitted Development) (England) Order 2015 has introduced greater flexibility to enable a more straightforward change of use within shopping frontages. The amendments allow permitted change from retail premises (A1) to financial services (A2), and restaurants and cafes (A3) without a time limit on that change of use.
- 2.33 The move is designed to reduce vacancies on high streets. This will, however, also serve to bypass the retail policies of many Local Authorities, which seek to retain and protect the retail function of primary shopping areas. The GNDP authorities each have a policy framework which has effectively protected the core retail function of the primary shopping area in recent years, however the GNDP authorities do not have any Article 4 directions in place covering loss of A1 floorspace in Norwich city centre, the large district centres, or the Main Towns. Therefore, under permitted development rights, loss of class A1 retail units to class A2, A3, D2 or C3 uses (in some cases subject to unit size and prior approval, as set out in Section 2) cannot currently be controlled by the Councils
- 2.34 It is, therefore, recommended that the GNDP authorities seek to introduce appropriate Article 4 directions across its network of centres in order to protect their vitality and viability over the course of the new GNLP period. The justification for this is as follows:
- Paragraph 23 of the NPPF states that local planning authorities should pursue policies to support the vitality and viability of their town centres, and define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages, setting policies which make it clear which uses will be permitted in each location. Paragraph 23 of the NPPF also states that Councils should promote 'competitive town centres' that provide 'customer choice and a diverse retail offer'.
 - Applying Article 4 directions will enable proposals seeking the loss of class A1 floorspace to be assessed against each authority's respective development plan. Any loss of retail

floorspace can therefore be managed through the planning system, in order to enable the authorities to undertake a full assessment of any proposals and the implications this may have on the vitality and viability of any affected centres.

- The uncontrolled loss of class A1 units could negatively impact on the vitality and viability of the network of centres as it offers the opportunity for the uncontrolled loss of retail units to other uses which will less well serve the needs of local residents.
- The Retail Study has identified that comparison goods retailing continues to underpin the vitality and viability of Norwich city centre, and that the centre exerts a region-wide influence as a comparison goods shopping destination. We expect this role to continue throughout the new GNLP period, but in order for the comparison goods shopping function of the city centre to be protected and enhanced, it will be necessary for a critical mass of comparison goods floorspace to be retained.
- The Retail Study has also identified that the Main Towns play an important role in meeting day to day comparison and convenience goods shopping needs. Each of the Main Towns serves a sizeable rural hinterland, and it is vital that these areas continue to benefit from access to a good range of shopping facilities in order to ensure that day to day needs can be met at the local level and promote sustainable patterns of shopping. The retail function of these Main Towns therefore should continue to be protected.
- As summarised above, the Retail Study has also identified that there is a positive 'need' for each of the GNLP authorities to positively plan for additional comparison goods floorspace over the GNLP period. The uncontrolled loss of class A1 floorspace would undermine this requirement.

2.35 Having regard to the above, it is recommended that **Article 4 directions are applied to primary and secondary shopping frontage in Norwich city centre, the Main Towns and Anglia Square large district centre**. Whilst we have not reviewed centres at lower levels of the retail hierarchy as part of our instruction, in principal we would also recommend such a policy is also applied to the network of district centres across the Norwich urban area, including new district centres which are expected to come forward as part of future residential growth.

3. Norwich Urban Area

- 3.1 The Norwich urban area is the principal focus and driver of the Greater Norwich economy, it accommodates the area's major retail, leisure and economic assets alongside key education and cultural institutions, it also provides the areas hub of local, national and international transport connections. The scale and nature of the urban area's offer acts as a magnet for people from the wider Greater Norwich (and indeed Norfolk/Suffolk) area to work, shop or visit.
- 3.2 The dominance of the urban area as the driving force of the economy is likely to continue as businesses increasingly seek more urban locations to locate their operations, large national retailers consolidate their store network into the larger centres where footfall is higher and the food and beverage sector expands to service these markets.
- 3.3 It is therefore critical for Greater Norwich that the urban area continues to be a priority investment and intervention, ensuring the conditions are in place to secure future activity as well as retaining current occupiers.

City Centre Employment Offer

- 3.4 In recent years the evolution of the UK economy has seen an increasing 're-urbanisation' of business activity. As new sectors in the creative and digital industries (for example) have grown and other 'traditional' sectors have needed to evolve to become more 'employee focussed' there has been a shift back to locations that can offer a broader range of services to employees.
- 3.5 Large town and city centres which had seen a flight of businesses to suburban business parks have experienced some reversal of the trend, particularly where centres are able to provide greater character, accessibility and amenities. This shift is now also being driven by wider business trends, the rise of new start ups and small businesses within the creative and digital sector in particular is fuelling demand for space in locations that allow greater interactions and allow small businesses to feel part of a bigger economic network.
- 3.6 Within the city centre there are a number of locations which could be attractive to new commercial activity, their success will be (to a large degree) determined by the ability to deliver the appropriate typologies to match the wider offer that will attract certain activities.
- 3.7 For example, with improvements to rail connectivity and a growing base of small innovative businesses the city centre has the opportunity to once again attract larger, national or international occupiers. However, whilst local amenities and supply chains will be vital in the

'offer' proximity to national and international connections will be fundamental. Spatially this suggests that sites and locations that offer good connections to Norwich Station will be particularly well suited for these businesses, offering improved opportunities to service London from a more affordable location.

- 3.8 The area around Rose Lane and Mountergate in particular provides the ability to deliver new commercial space that offers both access to the station and the wider city retail and leisure offer. This position will create an attractive (potentially river-side) environment for client facing activities and also provide an accessible location for workers, helping to enhance the attractiveness of businesses in Norwich to a much wider workforce.
- 3.9 Given the relationship between the city centre and the rural hinterland future accessibility in terms of private vehicles will also strongly influence locations of office demand within Norwich if businesses are to attract and retain a skilled workforce. This suggests that other locations that are easily accessible from the inner ring road may provide opportunities, including (in the longer term) a redeveloped Anglia Square/Magdalen Street and possibly more immediately St Stephen's.
- 3.10 Given business trends and the new demands this places on commercial floorspace typologies it is likely that relatively few requirements for standalone, large floorplate Grade A space will be generated. Enhanced data and communications technology are allowing businesses to use space more efficiently both in terms of desk space and accommodating infrastructure 'in house'. Rapidly changing processes and business approaches are also leading businesses to need more flexible spaces that can allow them to grow or contract quickly as their markets change.
- 3.11 As such, whilst space for standalone 'headquarters' may be required, there is likely to be significant demand for good quality multi-let serviced or flexible offices which could be accommodated within mixed use buildings, that provide other commercial uses on the ground floor. These types of spaces will be particularly beneficial in supporting the growth of the tech, media and creative sectors where many businesses experience rapid shifts in size as they mature. The pace of technological change makes many unable (or unwilling) to take on standard 'institutional' leases which create large cost burdens and liabilities and long term commitments that place businesses at risk.
- 3.12 The location of space for these sectors may differ from more corporate or professional service businesses. Tech/creative clusters have tended to grow in locations that have a distinct character, often underpinned by more edgy activity and independent leisure and dining provision that relate to the lifestyle of workers within the sector.

- 3.13 Within the city centre there are clearly opportunities to build on the character of the Lanes and St Andrew's areas of the city, where a vibrant independent bar/restaurant offer is underpinned by the University of Arts which in turn has attracted galleries and other arts based activities.
- 3.14 Again the nature of space provided will be critical to the success. Requirements may differ in the sector, requiring a lower specification than Grade A typologies required by professional service firms, but still needing good quality space with excellent ICT infrastructure. Character will also be a potential draw, suggesting there may be opportunities for creative reuse of existing buildings. Wider provision with the workspace, such as a restaurant or coffee shop will also provide an attraction.
- 3.15 What is clear across all potential city centre activity is that spaces will need to remain flexible, being able to adapt over time to changing demands, meaning services (cabling, air-conditioning etc) and partitioning will need to be able to be quickly and inexpensively repositioned. As with many existing buildings this has been a challenge for much of the existing office stock in the city centre, making it expensive or impossible to refurbish, therefore becoming vacant and converted to residential.
- 3.16 However, the refurbishment of the Union Building provides an interesting example of where something 'different' could be achieved through conversion to a more mixed scheme, including leisure and a new form (to Norwich at least) of shared workspace. These types of provision have the potential to attract new activity to the city and the Council may want to actively promote similar opportunities in appropriate buildings within the city, even if they form a medium term 'interim use' prior to comprehensive redevelopment.
- 3.17 What is clear is that there will continue to be competing demands on sites within the city centre and, even if the commercial market strengthens, values will continue to be outstripped by residential. This residential provision will be an important factor in attracting businesses as 'urban living' becomes increasingly popular.
- 3.18 New, mixed use, development will therefore be critical to maintain the diversity of the city centre and ensure all needs are met. Good quality workspace can increasingly be built into well planned residential schemes, however this will need to be planned beyond the individual (small) site level in order to make both uses attractive and operationally viable and to avoid conflicts in activity.

City Centre Retail Offer

- 3.19 Norwich City Council should continue to support and facilitate growth of comparison goods retail, commercial leisure and other 'main town centre uses' on appropriate sites in Norwich

city centre. This is to support and enhance its role as a centre of regional-scale shopping and leisure significance.

- 3.20 The comparison goods retail function of Norwich city centre should be protected and enhanced. There is evidence that there has been a small decrease in comparison goods floorspace in Norwich city centre in recent years and, whilst this has not had a detrimental impact on its vitality and viability, it is important to ensure that a critical mass of comparison goods retailing is retained. Evidence from the household survey undertaken in support of the Retail Study confirms comparison goods shopping is the reason the vast majority of people visit the city centre, and the city centre is a top 15 -ranked shopping destination. Norwich City Council should continue to ensure robust frontage policies are in place to protect the comparison goods shopping frontage of the primary shopping area, whilst allowing a broader range of uses to come forward in secondary areas.
- 3.21 It is recommended that the majority of the identified comparison goods requirement for the Norwich urban area of between 11,100 and 15,000 sq.m net by 2027 is accommodated in Norwich city centre. This is consistent with Norwich's role as the highest order centre in the region, and to reinforce and strengthen its comparison goods shopping role which is a key contributor to its overall vitality and viability. Where requirements cannot be accommodated in the City Centre, a sequential approach should be followed to ensure new floorspace is directed towards the most appropriate locations.
- 3.22 Norwich City Council should consider favourably proposals which seek to deliver new comparison goods floorspace in Norwich city centre, to help meet the identified quantitative retail needs which this study has identified. This could include supporting proposals for modernisation and amalgamation of existing units within the defined primary shopping area in order to provide larger-format units. It is recommended that applications for sub-division of units within the primary shopping area are generally resisted.
- 3.23 Opportunities to accommodate this demand is not easily identifiable within the town centre, however future potential may exist in sites which currently accommodate out-moded office stock and could be redeveloped for a mix of uses with retail at ground and office (and other uses) above. However, as shown by the St Stephens Street area (Site CC27 in the Norwich City Council Site Allocations and Site Specific Policies Local Plan 2014) these sites cannot be relied upon given they can be redeveloped under Permitted Development rights to residential, with little control or influence able to be exerted by the LPA. As such it is likely to be necessary for the Local Plan to identify further opportunities within the primary retail area.
- 3.24 There is no requirement for the City Council to plan for any additional comparison goods floorspace until the period 2022-27, giving time for a site master planning and, if necessary, assembly process to be undertaken.

- 3.25 We understand that the site is under single ownership (Aviva Investors) who have expressed intention to bring the site forward for development. The existing policy allocation supports the creation of retail uses at ground floor level, with commercial and residential uses to upper levels. We consider this to remain a sensible policy approach for the site.
- 3.26 It is recommended the City Council instruct a more detailed assessment of the commercial prospects of this site, including the quantum of floorspace which could be accommodated, the market appetite for new retail and commercial floorspace, and so on. This should be undertaken in collaboration with Aviva, other key stakeholders, potential development partners and architects, in order to develop a commercially-grounded vision for the site. The outcomes of this exercise can then inform the preparation of a master planned approach to the redevelopment of the site.
- 3.27 The Council should ensure the delivery of new comparison goods floorspace is well-related to the existing shopping circuit in the city centre, and does not result in the creation of a new shopping destination which alters the 'centre of gravity' in the centre.
- 3.28 Norwich City Council should consider favourably proposals which seek to deliver new commercial leisure uses and/or enhance the cultural and evening/night time economy of the city centre. Whilst the Retail Study has not identified any major qualitative gaps in the leisure/cultural offer of the city centre, additional provision which builds on current representation should be supported in principal. These uses play an important role in ensuring the city centre has a diverse offer to support its shopping function, and are particularly important drivers of footfall outside of retail trading hours. Commercial leisure/cultural uses should not be permitted in the primary shopping area, in order to protect the comparison goods retail function.
- 3.29 There is no quantitative or qualitative need for the City Council to plan for any additional convenience goods floorspace in Norwich city centre. However, applications which seek to enhance provision and provide additional consumer choice should be supported in principle. There is however qualitative requirement for additional convenience goods floorspace to serve the large district centre at Anglia Square (see separate recommendation below).
- 3.30 The City Council should continue to invest in and support enhancements to the promotion and marketing of Norwich city centre as a visitor/tourism destination. This should include continued promotion of festivals such as Norwich Food & Drink Festival, Norwich Fashion Week and so on. Such events help to provide further 'reasons to visit' for both local residents and visitors and can deliver spin-off benefits for the wider city centre.
- 3.31 The Council should invest in upgrading public realm in Norwich city centre to ensure all areas benefit from a high quality, uniform approach to public realm. Whilst the majority of Norwich

city centre benefits from a good quality, well maintained public realm, befitting its designation as a Conservation Area, there are areas in the city centre which require improvement:

- 3.32 A particular focus of improvements should be the pedestrian environment along Prince of Wales Road, linking the city centre with the railway station. The current environment does not present a positive first impression when arriving by rail. The upgrading of public realm in this area would also benefit the recent investment in, and planned redevelopment of, opportunity sites in the King Street character area.
- 3.33 Further investment in the appearance of Castle Meadow, building on recent investment to enhance its location as a public transport hub, would be beneficial. This should include securing positive re-use/redevelopment and improvement of a number of vacant/poor quality premises.
- 3.34 There is also a requirement for improvements to public realm at Anglia Square/Magdalen Street district centre, which are discussed separately below.
- 3.35 When preparing future strategies for the city centre, it is recommended that a character area-based approach is followed. It is considered that this approach represents a robust strategy which enables the different areas of this city centre, all of which have considerably different roles and functions, to develop complementary roles and functions which together support a strong and vibrant city centre. We have used the following character areas as the basis of our assessment of the performance of Norwich city centre and recommend that this approach is carried forward into the GNLP and future development plan documents. It is not considered that any of the character areas should deviate from their current respective functions as set out at paragraph 4.4. of the Retail Study. To recap, the character areas are as follows, with retail & main town centres principally taking place in areas (a), (b) and (f).
- a) Chapel & St Stephens / Castle & Market Place – as the focus for larger comparison goods stores / national retailers, and where majority of identified quantitative comparison goods needs should be directed.
 - b) Norwich Lanes – as the focus for specialist retail, bars, restaurants, cafes and services.
 - c) Cathedral and Tombland
 - d) Over The Water
 - e) King Street
 - f) Riverside – see separate recommendations below.

Anglia Square large district centre

- 3.36 The City Council should seek to progress the redevelopment of Anglia Square large district centre. The redevelopment of the 1970s purpose-built element of the Anglia Square / Magdalen Street large district centre is a long-standing regeneration aspiration of the City Council and this should be carried forward into the GNLP.
- 3.37 Redevelopment should continue to incorporate retail floorspace at ground floor level, in order to ensure that local residents' day to day shopping needs can be met. This should include units of a mixture of floorplate sizes, including larger units to enable current national retailers such as Iceland, Poundland and Poundstretcher to continue to have a trading presence in the centre, alongside smaller units for more specialist operators.
- 3.38 Although the Retail Study has identified no quantitative need for additional convenience goods retail floorspace to serve the Norwich urban area, there is an opportunity for qualitative improvements to the convenience goods retail offer in Anglia Square/Magdalen Street district centre, owing to the current limited facilities for local residents, with the exception of a small Iceland store. The scope for improvements will be dictated by the availability of land and premises in and around the district centre and the physical constraints of the centre. As such, this study does not dictate the form of additional provision, as this will be influenced by a suite of considerations at the development management stage and we also consider that qualitative improvements can be achieved in a number of ways.
- 3.39 Provision of a cinema should be retained if possible as the findings of the household survey suggest this attracts a relatively strong market share from the local catchment.
- 3.40 A comprehensive programme of public realm improvements to Anglia Square/Magdalen Street district centre should be progressed. The priority for this should be the northern part of the centre (north of St Crispins Road), in association with the redevelopment of the 1970s shopping centre. However, there is scope for public realm improvements to extend southwards along the length of the centre, to improve its current appearance which errs towards the functional in most places. Areas for improvement include the quality of the paving, better wayfinding and 'knitting together' the district centre with the wider city centre offer.

Riverside district centre

- 3.41 The City Council should continue to support the vitality and viability of Riverside large district centre as a retail and commercial leisure destination. This should include working with landowners and operators to deliver improvements to the environmental quality and appearance of the centre, and strengthening of linkages with the wider city centre.

- 3.42 We do not consider there to be a quantitative or qualitative need to plan for any additional large-format comparison or convenience goods retail floorspace at Riverside district centre. Such an approach would undermine the strategy set out above to focus new comparison goods floorspace on the primary shopping area in Norwich city centre, and would result in Riverside increase its attractiveness as a standalone retail destination, thus potentially competing with the city centre for comparison goods spend.
- 3.43 The City Council should consider the introduction of a smaller-format retail units at an appropriate site within or adjacent to Riverside district centre. Currently the district centre does not offer any smaller-format units which enable day to day shopping/services to be met – such as newsagents, dry cleaners, specialist food retailers and so on. In light of the considerable residential population in the immediate area it is considered that the introduction of a range of facilities of this nature would be beneficial.

Other Employment Sites

- 3.44 The Norwich urban area extends beyond the city centre, accommodating a diverse array of economic activity within its various business parks, industrial estates and specialist facilities. Often these sites make a distinct offer to businesses which, given the scale of each, is likely to direct the future nature of activity and development. As such infill, intensification and redevelopment of the existing estates will act as important locations for a range of activities, however may offer few options to diversify the existing portfolio. Key sites for future growth include:
- Vulcan Road/Fifers Lane
 - Longwater
 - Hall Road/Bessemer Road
 - Sweet Briar Industrial Estate
 - Airport Business Park
 - Norwich Research Park
 - Broadland Business Park
- 3.45 Locations such as Vulcan Road/Fifers Lane, the Longwater area, the Hall Road/Bessemer Road area and Sweet Briar Industrial Estate will continue to provide valuable locations for a diverse range of existing and new businesses in a range of industrial and office stock. They will also continue to attract demand for a range of non-B class uses including 'big box' retail, trade counter and leisure activities. In the main these will be able to co-exist, however they may impact the attractiveness of such locations to certain businesses, particularly those seeking higher quality environments or more specialised locations.

- 3.46 The Employment Land Assessment identified strategic opportunities to grow the advanced manufacturing/engineering sectors already present in the area. Within Norwich urban are this will be predominantly driven by activities within the aviation sector and its associated supply chain.
- 3.47 As such sites located in close proximity to the airport itself will be critically important to the future of the Greater Norwich economy as businesses seek to cluster in this location to benefit from both proximity to the airport itself and access to the aviation academy.
- 3.48 The range of sites clustered around the airport provide good choice to future occupiers. The existing Airport Business Park will continue to provide a range of accommodation, which can be incrementally updated and intensified to provide new opportunities broadly in keeping with the scale and character of the existing provision. Further non-B class airport servicing activities (such as hotels, car hire depots) may also be required to be accommodated within the mix of airport-related activity
- 3.49 Site B A9 offers the opportunity to extend the existing offer and provide modern versions of the stock already within the wider Business Park. It should seek to establish a higher quality of public realm and business environment in order to attract higher value uses and, where possible, limit the 'creep' of retail/leisure style activities that permeate the wider Business Park. To realise the potential of B A9 it may be that the existing offer around Meteor Close and the north of Hurricane Way (Halifax Court) will also need to be reconsidered, creating a higher quality offer and enhanced relationship between the existing site and any new development.
- 3.50 The undeveloped allocated sites (B A13, B A17) provide significant opportunities to broaden the portfolio of stock allied to the airport by creating a new high quality environment that enables the delivery of larger bespoke facilities. Given the evolution of the sector these are likely to be of a typology that allows a combination of production and design activities to be undertaken, requiring both 'industrial' and 'office' components within the building.
- 3.51 Together these sites have the potential to provide over 70ha of new employment land, significantly higher capacity than forecast need in the area. Clearly there is need for some headroom as demand (to some degree) could be supply led and, depending on the mix of units and density of development, may require more land than the 'average' ratios in the Employment Land Assessment suggest. However it is likely, in this plan period at least, that together these two sites are somewhat oversupplying the potential market.
- 3.52 Norwich Research Park is a further opportunity to harness a unique combination of assets to drive future growth. The Research Park already accommodates a range of research institutions, the University Hospital and a number of commercial businesses, replicating the

combination of academia, clinician and business activities that drive cluster growth, particularly within the life sciences.

- 3.53 It is clear the Research Park offers the prime opportunity to deliver high value growth through the expansion of specialist science-orientated stock. This will include the development of standalone, large research and development facilities that are tailored to specific business requirements. Given the bespoke nature of space, this site is likely to come forward in a piecemeal fashion in response to specific demand, making take up rates hard to predict.
- 3.54 However, the approach to research and development within the life sciences and agri-tech sectors is changing, with more emphasis than ever before on shared research and therefore facilities. The Research Park already offers shared premises within the Innovation and Accelerator centres which provide some level of shared laboratory space – the new Quantum Institute will also create shared facilities.
- 3.55 Similar to the evolution of Cambridge's science parks more significant shared research provision could provide a key element of the future offer, providing a new space for business and academia to interact, similar to the Laboratory of Molecular Biology in Cambridge or the Crick Institute in London.
- 3.56 Similar to the airport cluster, there is significant capacity at the Research Park, with c.40ha of allocated and largely undeveloped space. A further c.64ha has been identified through a call for sites exercise; however this is yet to be allocated. Despite significant growth potential within the science sector forecast, the competitive offer of the Norwich Research Park and the supply led nature of some demand it is difficult to envisage a situation in this plan period where all of this capacity would be required in the current plan period.
- 3.57 Despite this oversupply it is our recommendation that the offer of NRP is not 'diluted' in the future by allowing more general office occupiers to be located within the site. Clearly there will be a need to supply office space as part of the mix, but this should remain focussed on providing accommodation for those businesses active within the target 'science' sectors. This may be non-science businesses but they should still be part of the core supply chain, such as legal services, ICT support, specialist logistics handlers. This range of services will provide the type of environment and inter-relationships life science/agri-tech businesses will seek and retain the character and offer to an international market. It will also ensure that NRP is not placed in direct competition with other more general office locations such as Broadland Business Park or the City Centre.
- 3.58 As has been experienced in recent years the Greater Norwich economy is underpinned by a greater range of activities than life sciences, agri-tech and advanced engineering. The area also has a strong base of office based occupiers across a range of sectors including off-shore

energy, finance, insurance and software. Many of these larger activities have been accommodated by the Broadland Business Park, located to the south east of the urban area in an urban fringe location that is clearly attractive to many business types. The cluster of sites has also attracted a range of other non-B class employment generating activity.

- 3.59 Broadland Business Park has become the main office centre for the Greater Norwich sub-region outside of the City Centre, with a number of occupiers locating here from the city centre. Whilst we expect this trend to slow as business preferences change, there will still be demand for space here, particularly for occupiers seeking large space or wanting to serve markets located elsewhere to the east of Norwich – particularly in the oil and gas and renewables sector.
- 3.60 A number of expansion and infill opportunities exist within the Business Park, which would most likely suit larger corporate activities. Scale, design and nature of buildings will most likely evolve as businesses seek space that more closely reflects their brand image, with the potential for new 'land mark' architecture. There may also be potential to introduce some smaller, multi-let or flexible spaces to enhance the resilience of the offer and enable a true 'ecosystem' of businesses to evolve.
- 3.61 These major sites will form the future bedrock of the urban area's economy alongside more modest scale upgrading and intensification of existing active sites. Beyond these there is little evidence in the Employment Land Assessment to suggest major allocations will be required elsewhere to meet the forecast scale and nature of demand within the urban area. Within the following sections we consider where capacity should be provide elsewhere in Greater Norwich to meet demand and provide greater choice to occupiers.

4. 'Rural' South Norfolk

4.1 Our recommended strategy for the future provision of retail and main town centre uses in the network of Main Towns across South Norfolk is one of consolidation rather than significant expansion of the centres' respective retail functions. Whilst a proactive approach to growth should be adopted, growth should remain appropriate to the role and function of the centres. The recommendations below should be read in conjunction with the GNDP-wide recommendations set out above.

1. **The Retail Study has identified that South Norfolk Council will need to plan for between 2,300 and 2,800 sq.m net additional comparison goods floorspace across its Main Towns and the large villages of Loddon and Long Stratton over the period to 2027.** There is no pressing qualitative need for this requirement to be directed towards any one centre to improve its retail offer, although as the largest centre in the District, coupled with the more constrained nature of the centres of Wymondham and Harleston, we would recommend that the majority of this requirement is directed towards Diss.
2. **The Retail Study has identified that South Norfolk Council will need to plan for the following amounts of convenience goods floorspace over the period to 2027:**
 - **Diss: up to 2,500 sq.m net**
 - **Harleston: no requirement**
 - **Wymondham: up to 300 sq.m net**
 - **Rural South Norfolk incl. large villages: up to 1,200 sq.m net**

The quantitative need for Diss arises because each of the existing supermarkets in the town (Tesco, Morrisons and Aldi) are 'over-trading'. In Wymondham, there is a limited requirement for just 300 sq.m net convenience goods floorspace by 2027, as most of the expenditure growth arising here will be accommodated by the proposed Lidl store at Farrier Close. We do not consider there is a quantitative or qualitative need for any additional foodstore provision in Harleston.

3. **South Norfolk Council should support and facilitate growth of 'main town centre uses' on appropriate sites in the Main Towns of Diss, Harleston and Wymondham.** Growth should be of a scale appropriate to the role and function of the centres. Growth of an appropriate scale should also be supported across the network of large villages, but this should be of a more limited scale reflecting their lower position in the hierarchy of centres.
4. **The retail function of the Main Towns and Large Villages should be protected and enhanced.** The Main Towns and Large Villages perform vital roles as centres for day to day shopping for their respective settlements and a wide rural catchment. It is important that

this shopping function is retained and enhanced. This should be achieved through the implementation of robust frontage policies which define primary and secondary shopping frontages, in order to retain a critical mass of retail floorspace in the centres.

- 5. Support in principle applications which seek to diversify the retail and commercial leisure offer of the Main Towns, in particular those which seek to widen the food and beverage offer in the centres.** This will assist in the creation of a broader mix of complementary uses, extend dwell times in the centre, and assist in the creation of more vibrant centres outside of retail trading hours. These uses should be restricted to secondary frontage areas in the centre, in order to protect the core retail function of the primary shopping area.
- 6. In the main there is likely to be limited demand for new B class space within the town or village centres.** Whilst some larger town centres such as Diss retain a stock of locally orientated professional services (such as legal and accountancy businesses) there is no obvious requirement for the provision of major new floorspace for further office activity. However, as the population of the towns grows and changes, so too will the potential nature of business activity, which could in turn encourage some level of new demand. Similarly, as people become able to work more flexibly some 'shared' workspace may also be an opportunity. However, this is likely to be modest and in most cases form part of mixed use developments. To support new demand delivering the objectives of recommendation 5 above will be beneficial, creating a range wider amenities to support business activity.
- 7. South Norfolk Council should continue to ensure their Main Town centres Large Village centres in the benefit from good levels of environmental quality and an attractive environment for businesses and residents.** The centres all benefit from generally positive levels of environmental quality but this will need to be invested in to ensure the centres remain pleasant and attractive places to visit. In the short term, the Retail Study identified the following areas as having scope for improvement:
 - a. **Diss:** continue to deliver improvements to public realm (particularly street paving and street furniture) at the western end of the town centre, focused on the junction of St Nicholas Street and Denmark Street.
 - b. **Harleston:** public seating (in terms of quality and placement) throughout the town centre.
 - c. **Wymondham:** consider development of a shopfront strategy to ensure the quality of shopfronts across the town centre is reflective of the historic nature of the centre and its location within a Conservation Area. This could potentially include grants to independent businesses to help improve their appearance in instances where this is considered necessary.

Diss Employment Offer

- 4.2 Diss occupies a potentially strategically interesting location at the intersection of a number of key road routes connecting the market towns of Norfolk and Suffolk as well as being almost equidistant from Ipswich and Norwich. It is one of the few towns within the Greater Norwich area to be served by rail, providing a direct connection to London and will benefit from enhanced services via the 'Norwich in 90' programme. These locational attributes and improved connectivity provide the potential for economic growth as an enhanced centre serving a large rural hinterland.
- 4.3 Whilst the rail services in particular do not directly connect the town centre, where there is an existing presence of professional service activity, it does directly serve the collection of industrial sites and new land allocations. Given the historic character of Diss there may be limited opportunities for major B class development within the town centre, however these rail served sites may offer the potential to deliver economic growth.
- 4.4 In sector terms Diss could offer opportunities for a range of production based activities, both in traditional sectors and new, high value activities. The road connections will therefore be equally important, enhancements to the A11 have already helped improve connections to national markets, whilst local connections to locations such as Eye Airfield will offer the potential for complementary activities to come forward.
- 4.5 The scale of the offer at Diss means there is limited data available from which to establish robust trends, however it would appear that, whilst rents have not materially improved there has been a significant fall in property vacancies around the station and also a slight upturn in leasing activity.
- 4.6 Clearly, however, some of the market indicators will be limited by the nature and quality of stock on offer today. The southern connections to the A14 via the A140 may also impact on levels and types of demand as it does constrain the reliability of journey times to key ports.
- 4.7 These attributes, alongside a strengthened town centre food and beverage offer, could help Diss become a focal point for new forms of development including higher quality industrial units and hybrid stock that delivers some new, integrated, office, production and distribution space.

Hethel & Wymondham

- 4.8 The A11 Tech Corridor offers strategic opportunities to build off the knowledge bases in Cambridge and Norwich and evolve a complementary offer that attracts a range of high value activity that cannot be accommodated in either city.

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- 4.9 As noted a key part of this proposition will be to continue the growth of the high performance engineering sector, both utilising its traditional motorsport base but also diversifying into new technologies by combining these skills with wider research in digital technology and the life sciences.
- 4.10 The Hethel Engineering Centre is one of Greater Norwich's crown jewel assets in terms of future economic growth, providing an identifiable platform for businesses within the high performance engineering sector that is attracting a cluster of established, small and spin out businesses around the world renowned Lotus factory.
- 4.11 The ongoing expansion of the Hethel site will be critical for the success of this sector, delivering high quality industrial premises that integrate office/R&D facilities in a supportive environment, allowing testing, product development and production to take place in one location with the bespoke support of sector specific experts via Hethel Innovation.
- 4.12 However if these activities do grow as predicted then Hethel itself will not be large enough to accommodate demand, and therefore other sites along the A11 will be attractive to occupiers and developers either for direct activity or tier 2 and 3 suppliers. From a base on the A11 businesses will be able to service the Norwich and Cambridge research centres as well as Hethel.
- 4.13 Given the strategic road connections offered by the A11 to/from the rest of the country and, critically, the UK port network there is also likely to be demand in this corridor for distribution and logistics activity. This demand is likely to operate in two directions, firstly to distribute goods into the Greater Norwich area – particularly relating to e-commerce but also components businesses need – and secondly out of the area, as high value goods are shipped to the rest of the UK and the world.
- 4.14 It is therefore likely that locations such as sites SN A22 and SN A23 could provide a location appropriate to meet the warehouse and distribution needs identified within the Employment Land Assessment. Some of this demand has already been realised further west along the A11 at the Harling Road Estate and Snetterton.

5. 'Rural' Broadland

5.1 For Broadland, as with South Norfolk it is considered that an appropriate policy position for the new GNLP period is one of consolidation rather than an expansion/intensification of the retail function. The only Main Town in the District, Aylsham, is performing well with no apparent areas of concern in respect of its vitality and viability, although some issues of car parking capacity were identified in the household telephone survey undertaken in support of the Retail Study.

- 1. The Retail Study has identified that Broadland Council will need to plan for up to 500 sq.m net additional comparison goods floorspace over the period to 2027.** This is a low level of quantitative need, reflecting the limited role and function which centres in the District play as comparison goods shopping destinations. It is recommended that this requirement is directed towards Aylsham, as the highest order centre (a Main Town) in the District.
- 2. The Retail Study has identified that Broadland Council will need to plan for up to 800 sq.m net additional convenience goods floorspace over the period to 2027.**
 - We do not consider there to be a quantitative or qualitative need for any additional foodstore provision to serve Aylsham, which is already well served for supermarkets, some of which are trading at below company average levels.
 - It is recommended that the majority of the identified convenience goods requirements are directed towards enhancing provision and consumer choice in large village centres. In particular, there is a qualitative need for additional convenience goods provision in Acle, where the closure of the in-centre Co-Op store has resulted in a reduction in consumer choice and the sole supermarket in the centre (an out-of-centre Co-Op) over-trading.
- 3. Broadland Council should support and facilitate growth of 'main town centre uses' on appropriate sites in Aylsham town centre.** Growth should be of a scale appropriate to the role and function of the centre. Growth of an appropriate scale should also be supported across the network of large villages, but this should be of a more limited scale reflecting their lower position in the hierarchy of centres.
- 4. The retail function of the Main Town of Aylsham and Large Villages should be protected and enhanced.** The Main Town of Aylsham and Large Villages perform vital roles as centres for day to day shopping for their respective settlements and a wide rural catchment. It is important that this shopping function is retained and enhanced. This should be achieved through the implementation of robust frontage policies which define primary and secondary shopping frontages, in order to retain a critical mass of retail floorspace in the centres.

5. **Support in principle applications which seek to diversify the retail and commercial leisure offer of Aylsham town centre, in particular those which seek to widen the food and beverage offer in the centres.** This will assist in the creation of a broader mix of complementary uses, extend dwell times in the centre, and assist in the creation of more vibrant centres outside of retail trading hours.
6. **In the main there is likely to be limited demand for new B class space within the town or village centres.** Whilst some centres host a range of local services (such as legal and accountancy businesses) there is no obvious requirement for the provision of major new floorspace for further office activity. However, as the population of the towns grows and changes, so too will the potential nature of business activity, which could in turn encourage some level of new demand. Similarly, as people become able to work more flexibly some 'shared' workspace may also be an opportunity. However, this is likely to be modest and in most cases form part of mixed use developments. To support new demand delivering the objectives of recommendation 5 above will be beneficial, creating a range wider amenities to support business activity.
7. **Broadland Council should continue to ensure their Main Town centres and Large Village centres benefit from good levels of environmental quality and an attractive environment for businesses and residents.** The centres all benefit from generally positive levels of environmental quality, and no areas of immediate attention were identified from the centres assessed, However, the Council should take a proactive approach to investing in its centres to ensure they remain pleasant and attractive places to visit.

Food Enterprise Zone at Honingham

- 5.2 The designation of land at Honingham as a food enterprise zone (FEZ) provides a new asset within the Greater Norwich portfolio of location opportunities for food related businesses, whilst not focussed as a location for research and development in the food and agri-tech sector, it will potentially offer a complementary location to the intensive research activity at Norwich Research Park
- 5.3 The EFEZ offers good connectivity via the A47 to a range of growers and producers, and will benefit from a range of incentives (access to grant funding, simplified planning etc) however as a new greenfield site, there are currently few other assets to support occupiers, as such it is difficult to forecast the scale and nature of demand.
- 5.4 Based on forecasts alone there is potentially limited need for the Enterprise Zone, however there may be a supply led opportunities to attract 'spin out' businesses from the farming community. Given the bespoke nature of the offer it is also difficult to predict the scale and nature of premises that will be required, however it is likely these will need to be a range of industrial typologies, with a particular focus on small to medium units.

Rackheath

- 5.5 The current Rackheath industrial area provides a general industrial area, meeting the needs of a number of local, regional and even national operators. Its potential is currently somewhat limited by its location and relatively poor quality road connections.
- 5.6 However, the delivery of the NDR will dramatically change the context of the site and the proposed expansion land, providing high capacity new links to the north of the city, connecting into the strategic road network to the south; greatly enhancing access to a range of national markets as well as improving access to the city itself and the potential aerospace cluster at the airport.
- 5.7 This may drive a new demand for distribution activities, particularly some 'final mile' carriers seeking to service the more dense urban population in the city as well as the wider rural hinterland. Rackheath could therefore be a location to promote the delivery of warehousing space to meet the needs identified in the Employment Land Assessment.
- 5.8 However, the connections it will offer back to the city, Broadland Business Park and the airport cluster may also help to unlock new forms of demand, supported by the high quality mixed use environment proposed through the residential led masterplan. Over time it could evolve to become a new office location, offering counter point to Broadland Business Park, creating choice in the market that does not currently exist. The offer at Broadland and potentially Rackheath should also complement a revitalised city centre office proposition, providing a choice in the market for occupiers.
- 5.9 It would be undesirable to direct all future Grade A office development to the city centre as this is unlikely to provide the necessary choice or flexibility to respond to the market and accommodate any future development or occupier interest. As has been seen already within Greater Norwich, some occupiers have chosen to locate outside of the City Centre in a location that better suits their needs. A city centre only approach would mean occupiers that do not rely on the wider benefits of a city centre location could also be 'lost' from the area.
- 5.10 It is important to note that location decisions by occupiers, investors and developers are unlikely to be 'sequential'. Those which are interested in operating/developing outside of the city centre are unlikely to shift their focus towards the city centre purely on the grounds that sites are not allocated 'out of town'. The two locations are likely to attract different types of development and therefore different occupier interests. Rather than simply transfer investment towards the city centre, an out of centre occupier is more likely to consider opportunities in other areas which meet their needs.

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- 5.11 A number of sectors for which Greater Norwich has growth potential will be attracted to the city centre, particularly activities such as professional/business services (legal and accounting activities for example) which require a 'front door' that is easily accessible for clients. Similarly some 'creative' and 'technology' based sectors will also seek city centre locations to benefit from the wider amenity/leisure provision, which will appeal to staff, and ability to network with other similar businesses.
- 5.12 On the other hand some occupiers will not wish to be 'in town' on the grounds that it is perceived to be a more expensive option and they may suffer from wider challenges created by higher traffic levels, restricted parking regimes or lower security of premises outside of office hours.
- 5.13 For some business activities these factors are less critical and strategic road access for staff, parking, larger, self-contained floorplates and security will be a much more significant set of location drivers. This will be exacerbated for business activities, such as call centres, that do not require access to / from clients or other businesses. Therefore it is important to ensure a balance can be struck, which maintains the vibrancy and vitality of the city centre but also provides stock choices. As such providing office space at Rackheath would not necessarily increase competition for the city centre
- 5.14 As the employment sites at Rackheath blend into residential there may also be opportunities to provide some 'transition' activities that help the integration of employment and residential to create single places (rather than requiring significant landscaping) this could include a range of smaller units to encourage start-up activity.
- 5.15 This demand would most likely occur towards the latter part of the plan period and into the next once the wider Rackheath offer is established in terms of the quality of place and wider amenity offer.

6. Conclusions

- 6.1 It is clear from the evidence and analysis provided across both the Retail Needs Assessment and the Employment Land Assessment that there is significant potential for Greater Norwich to grow and diversify its offer, enabling the full range of city and town centres, specialist employment sites and general industrial/business parks to deliver more jobs, a higher level of economic value and a broader offer to residents of Greater Norwich.
- 6.2 It is also clear that, given the diversity of the area, there needs to be a focus on a limited number of core sites and locations in order to communicate a clear proposition to the market and focus public sector resources efficiently to help deliver on the potential of the area.
- 6.3 The overarching philosophy across the commercial offering of Greater Norwich needs to be one of a portfolio of places and spaces that work together, drawing on the key strengths they offer, to uplift economic performance across all sectors and provide greater opportunity for residents.
- 6.4 In B class employment terms Greater Norwich has a base of assets that can underpin some clearly defined sector opportunities, as such it is vital that a focus is provided on sites that will deliver the infrastructure, environment and mix of activities that will attract these businesses. Not all employment sites are equal in that regard, therefore sector specific approaches and tailoring should be retained for the following locations:
- Norwich Research Park;
 - Norwich Airport Cluster;
 - Hethel and Wymondham; and
 - The Food Enterprise Zone.
- 6.5 These locations have the anchor institutions or businesses to drive the clustering of activity within life sciences and agri-tech, high performance engineering, aerospace and the land based economy.
- 6.6 The economic opportunity extends beyond these specific sectors to include a wider range of creative, digital, professional service, off-shore energy and other production based activities. These activities have less specific locational requirements and therefore will drive the expansion and enhancement of the offer within the City Centre, the rejuvenation and intensification of existing employment sites and the delivery of new allocations. Again key more generalised economic locations include:
- City Centre

- Broadland Business Park
- Rackheath
- Diss
- Vulcan Road/Fifers Lane
- Longwater
- Hall Road/Bessemer Road
- Sweet Briar

- 6.7 To support economic growth and ensure the long term vibrancy and vitality of the range of city and town centres across Greater Norwich continued investment, promotion and diversification in these locations will be critical.
- 6.8 The City Centre itself has a vibrant core and distinct character, which should be the foundation of future growth, but also there is an identified opportunity to broaden the town centre offer and deliver new retail space and activity. This new space should be integrated into the existing core and seek to work alongside new B class floorspace and enhanced 'leisure' offerings, supported by high quality public realm, to create vibrant, attractive mixed use locations that are attractive to a range of occupiers.
- 6.9 The market towns generally perform well given their context, however all would benefit from a diversification of their offer to include new food and beverage outlets and enhanced retail provision relative to their size. The food and beverage offer will be critical to drive footfall and increase dwell time in the centres but equally will support new (smaller scale) B class activity, which may be driven by greater levels of self-employment and entrepreneurialism, enabled by technology. Vibrant local service centres could in the medium term present key locations for small business space for a range of activities.
- 6.10 The continuation of a joined up approach to economic development across Greater Norwich will be the key to success. It has long been recognised that the economy of the Greater Norwich is driven by the urban economy of Norwich, with institutions and sites clusters around the urban area providing the focal point for growth and drawing skills and labour from across the wider area.
- 6.11 To a large degree, as the economy once again becomes more urbanised, this trend will be reinforced, however it is clear that some rural locations have specific drivers which will underpin their success. Ensuring all these assets work together effectively and the coordinated offer is articulated clearly will lead to a much enhanced level of activity that will benefit the whole of the Greater Norwich area and ensure its role at the cutting edge of innovation is maintained and improved.

6.12