THE RETAIL GROUP

informed solutions

Norwich Future Retail Strategy

Full Study Report

NORWICH
BUSINESS IMPROVEMENT DISTRICT

May 2019

Contents

Study Objectives

Study Objectives

The objectives and target outputs for the project are summarised as:

- To identify a vision for the future Norwich City Centre 'retail' offer that will meet the needs of all future customer groups
- To identify what the optimum future offer will be; including the retail, catering and leisure components, to include retail, food and drink (F&B), leisure services, markets and events
- To provide an action plan to deliver the strategy, key stages and milestones
- To provide the content for a Norwich Prospectus and direction for a retail marketing strategy
- To help improve the performance of existing businesses
- To identify gaps in the offer and opportunities to fill the gaps
- To support other wider Norwich strategies and plans

The right future offer and mix, right experience, right facilities to retain and grow customer usage

Study Approach

Study Approach

In order to achieve the study objectives, we have completed the following areas of research

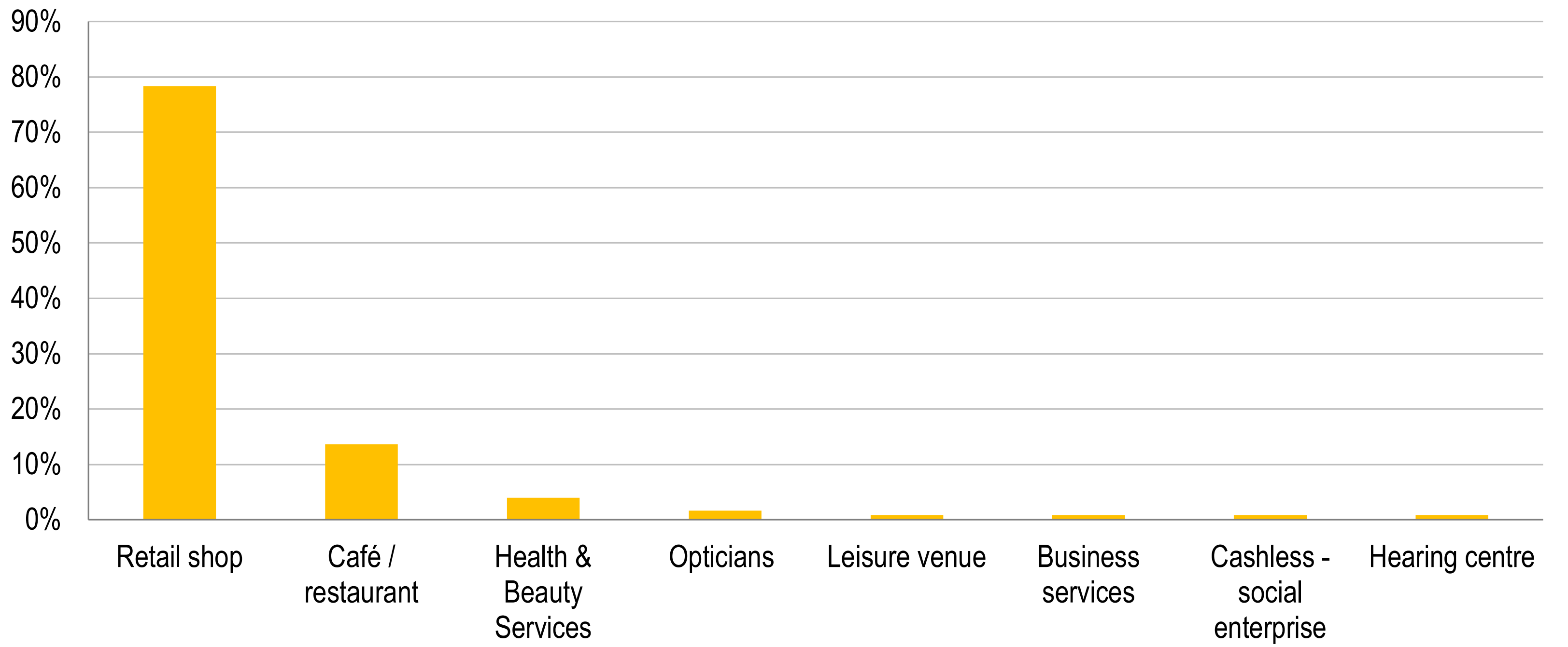
- Survey of city centre operators
- Review of the city centre and retail park offer, from the perspective of the consumer
- Survey of stakeholders
- Review of demographic information
- Benchmark locations
- Emerging retail and consumer trends

Survey of City Centre Operators

Operator Survey Overview

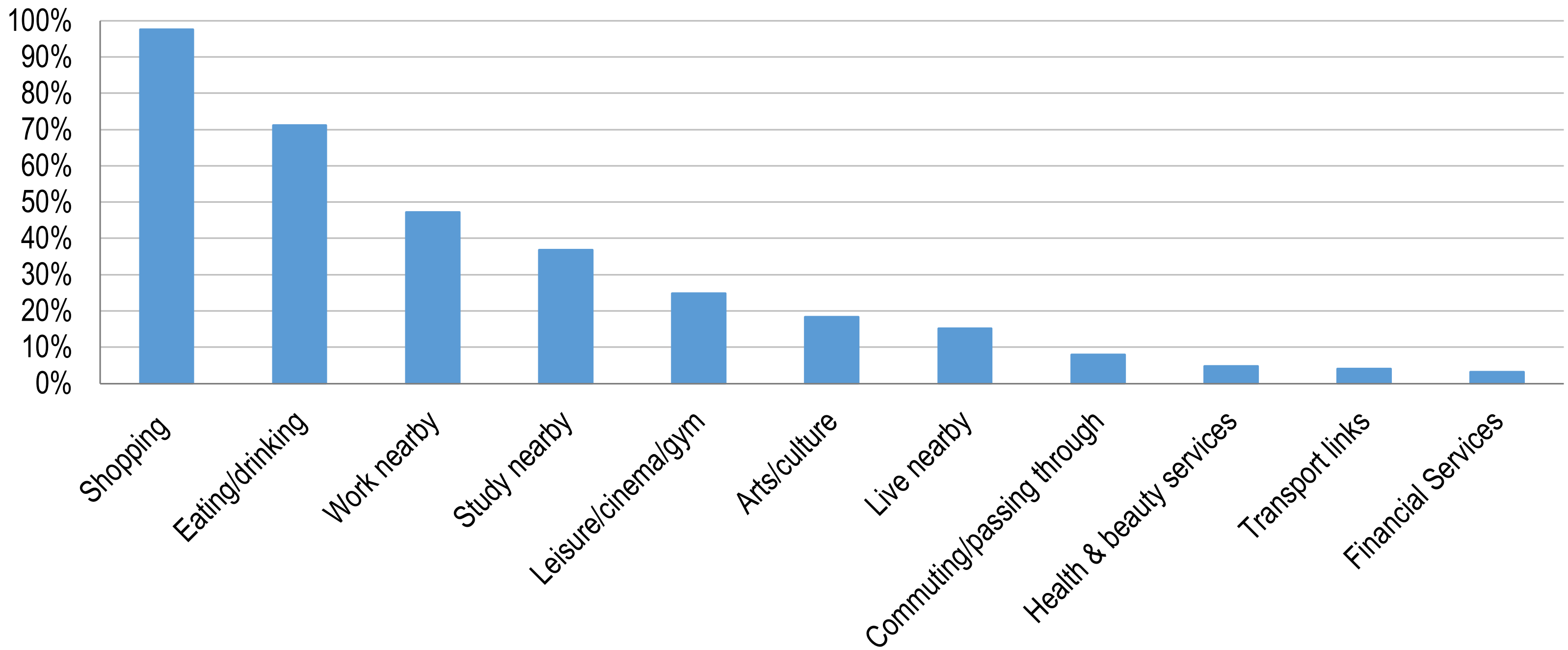
- Bespoke survey developed
- 150 were handed out across extended town centre area, plus two more emailed
- 123 completed surveys were picked up the same day, plus four extra since
- Excellent response
- No major issues or negativity experienced during survey

Type of Business



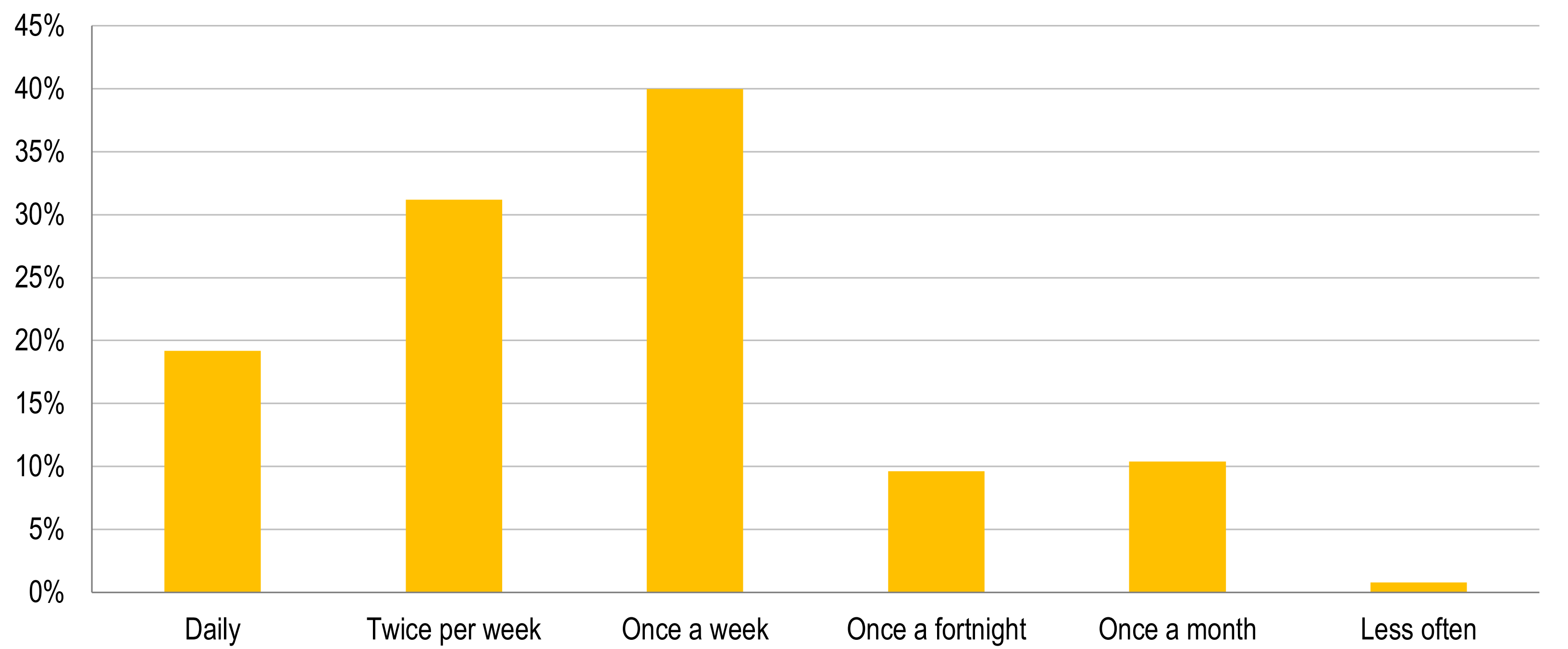
- Survey respondents are dominated by retail shops, followed by F&B and retail services

Main Reason for Customers to Visit



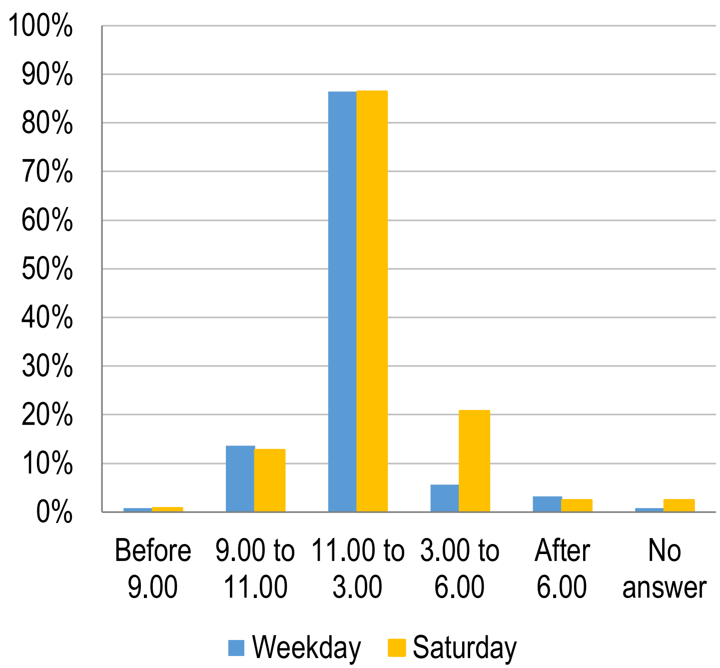
- Most respondents report shoppers as their primary customer group, followed by F&B, work, study, leisure, culture and live nearby
- Norwich is clearly acting as a multi-purpose visit destination

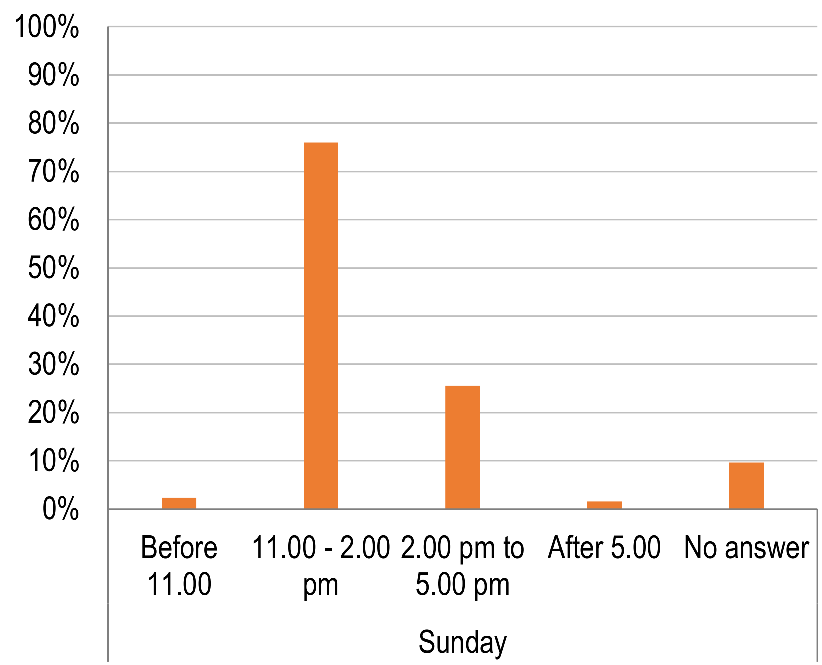
Customer Visit Frequency



- Retailers felt that most customers visited at least weekly, if not more frequently
- Circa half of consumers are believed to visit at least twice a week or even every day

Busiest Time of Day





- Findings reflect traditional retail peak trading times – lunchtime is busiest, followed by later in the afternoon
- Weekdays and Saturdays are similar

- Again, these are typical hours for a major regional city centre with early afternoon being busiest

NORWICH
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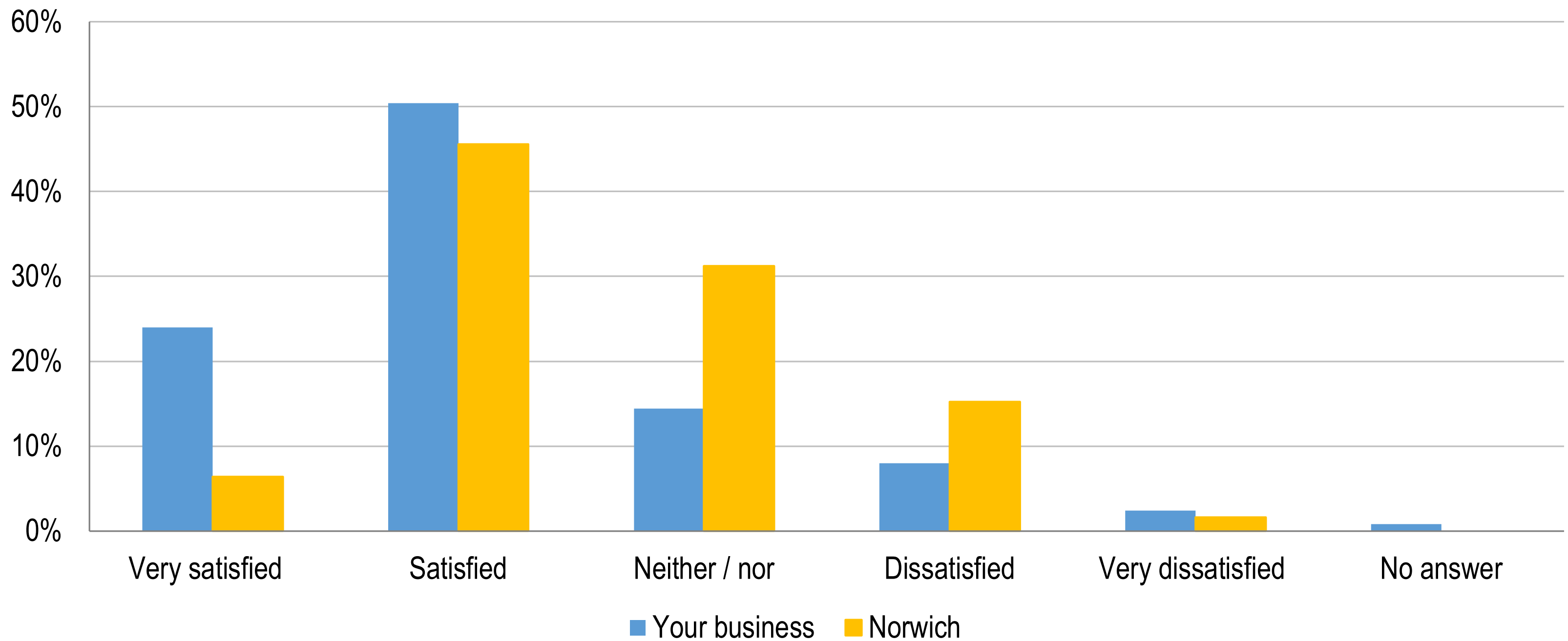
Average Transaction Value

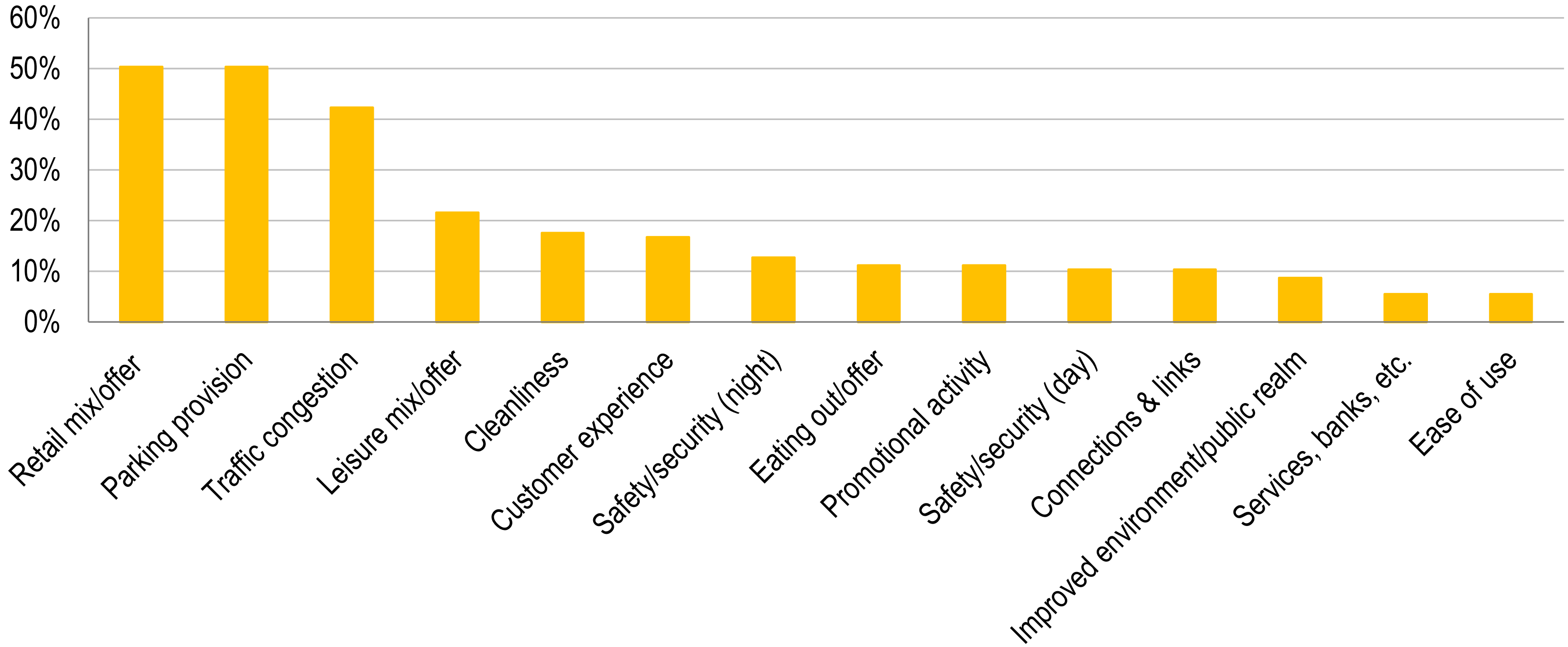
- Good range of ATV's reported – suggests good range of price points available
- Encouragingly, survey reveals healthy levels of higher transaction values

Retailer Satisfaction Levels



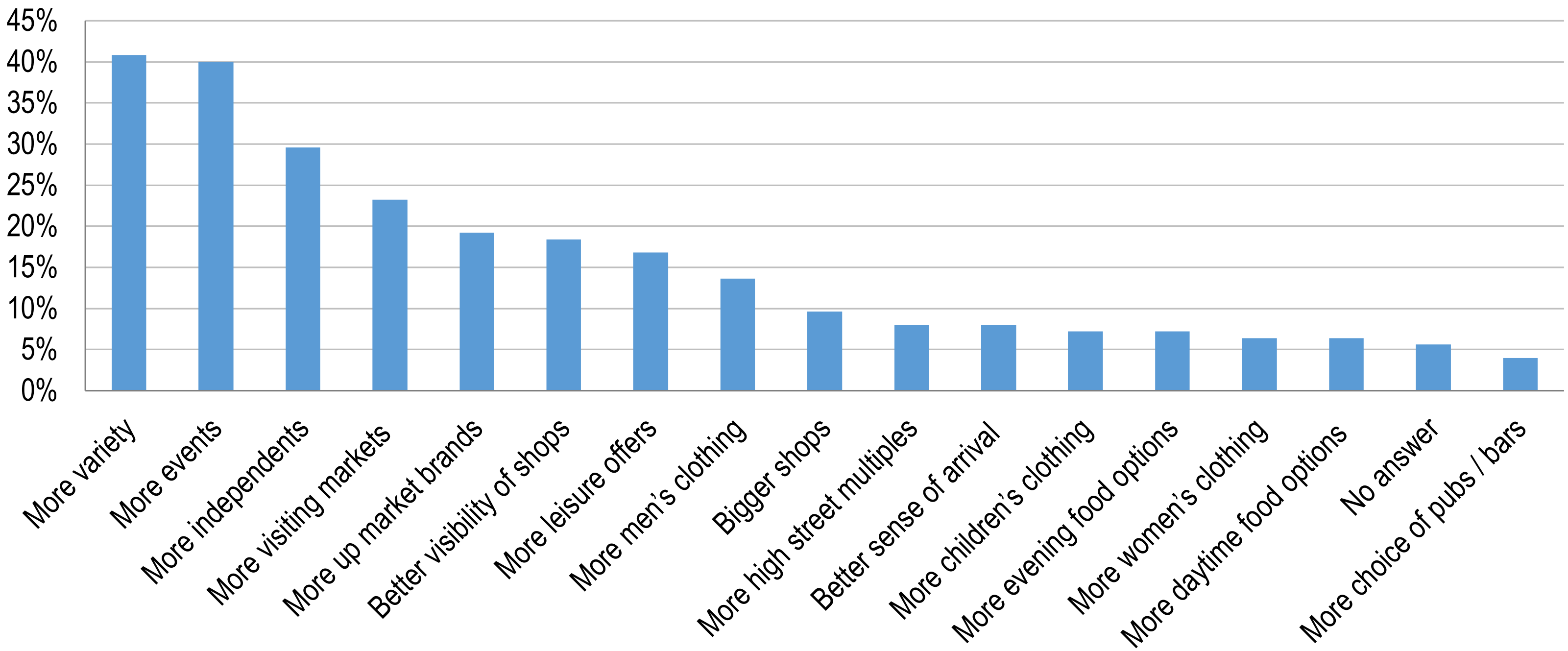
- Circa ¾'s of retailers are very overwhelmingly satisfied with the performance of their shop
- Few are dissatisfied
- Norwich satisfaction levels are not as positive, but still good

City Centre Priority Improvement Areas



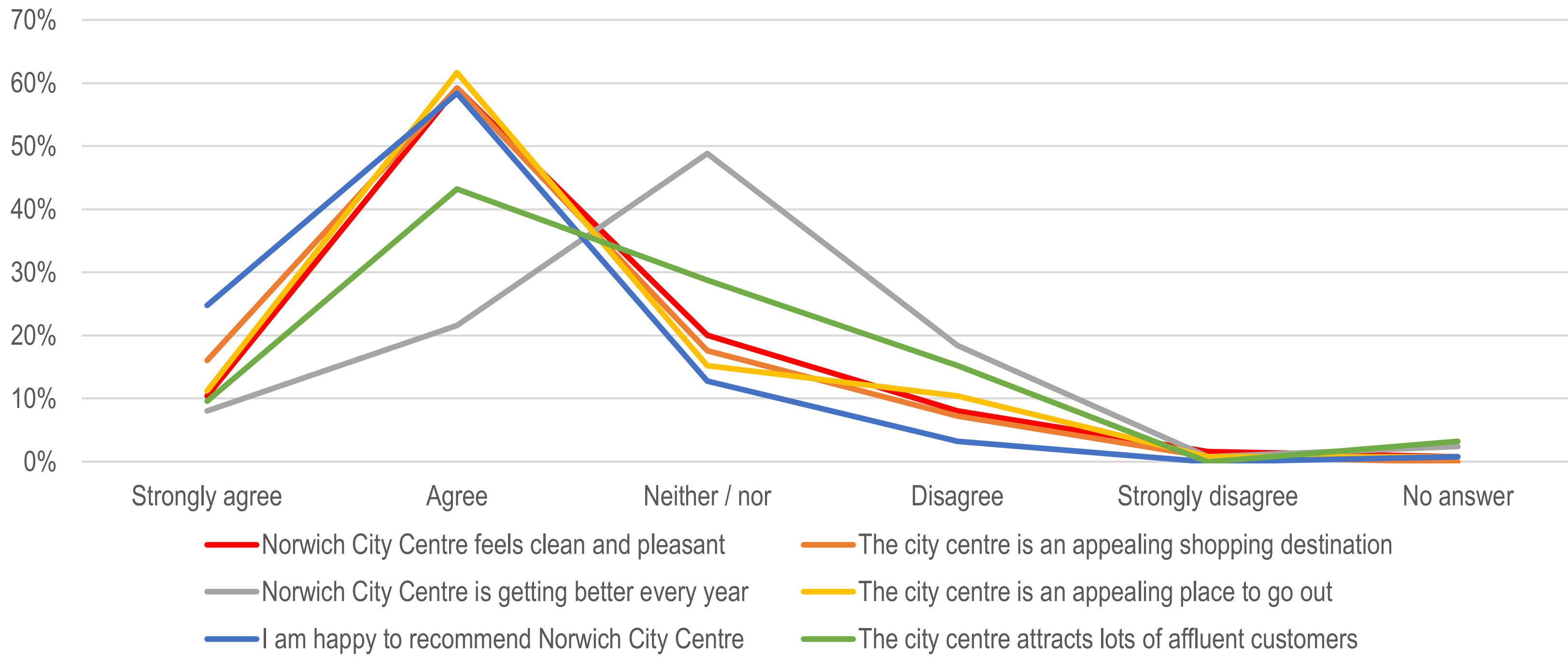
- General improvement areas from the perspective of retailers include
  - The offer (retail, leisure and F&B)
  - The consumer experience (parking, congestion, connections and public realm), and
  - Management of the offer (cleanliness, safety and promotions)

Improvements Wanted to Offer



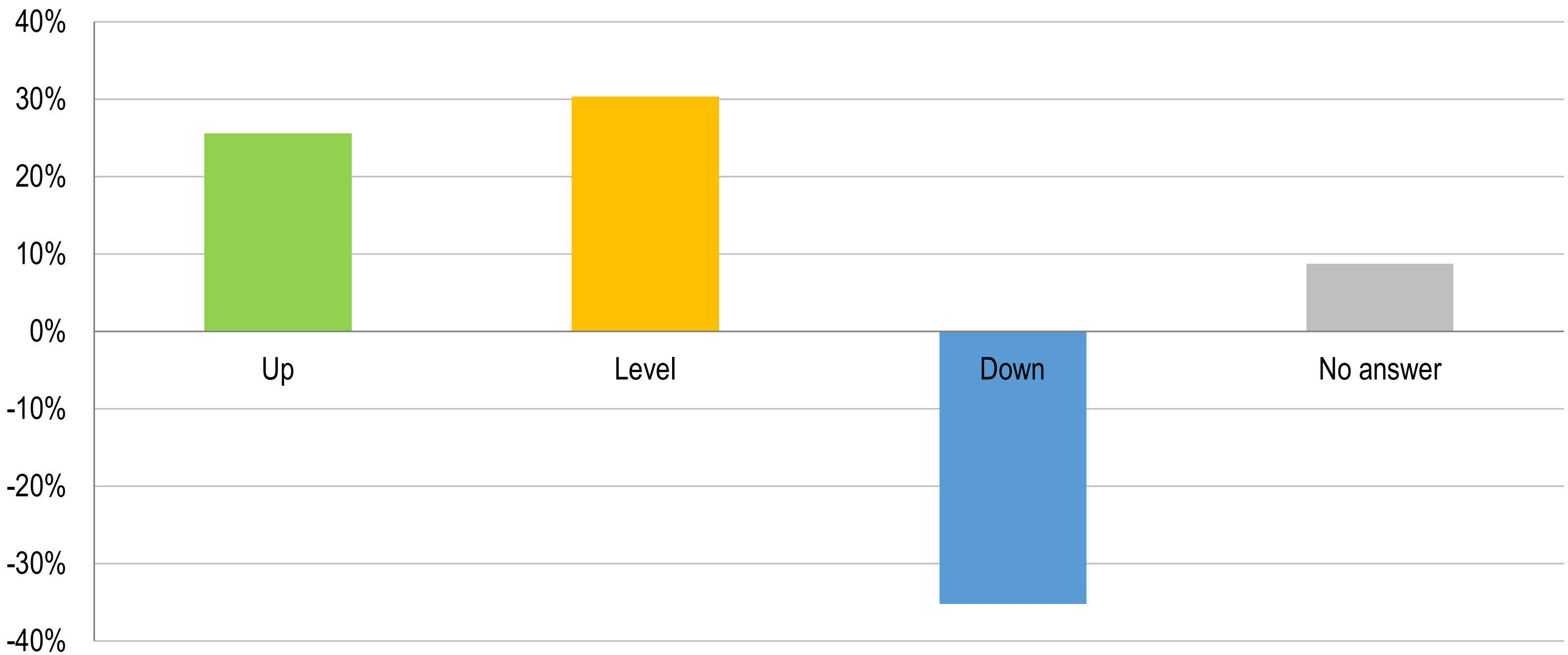
- Specifically in regards the offer itself, improvements wanted include
  - More choice (variety, independents, upmarket, leisure, menswear, multiples, food & womenswear)
  - More activity (events, markets)
  - Better delivery (more visibility of shops, better sense of arrival)

Views and Opinions



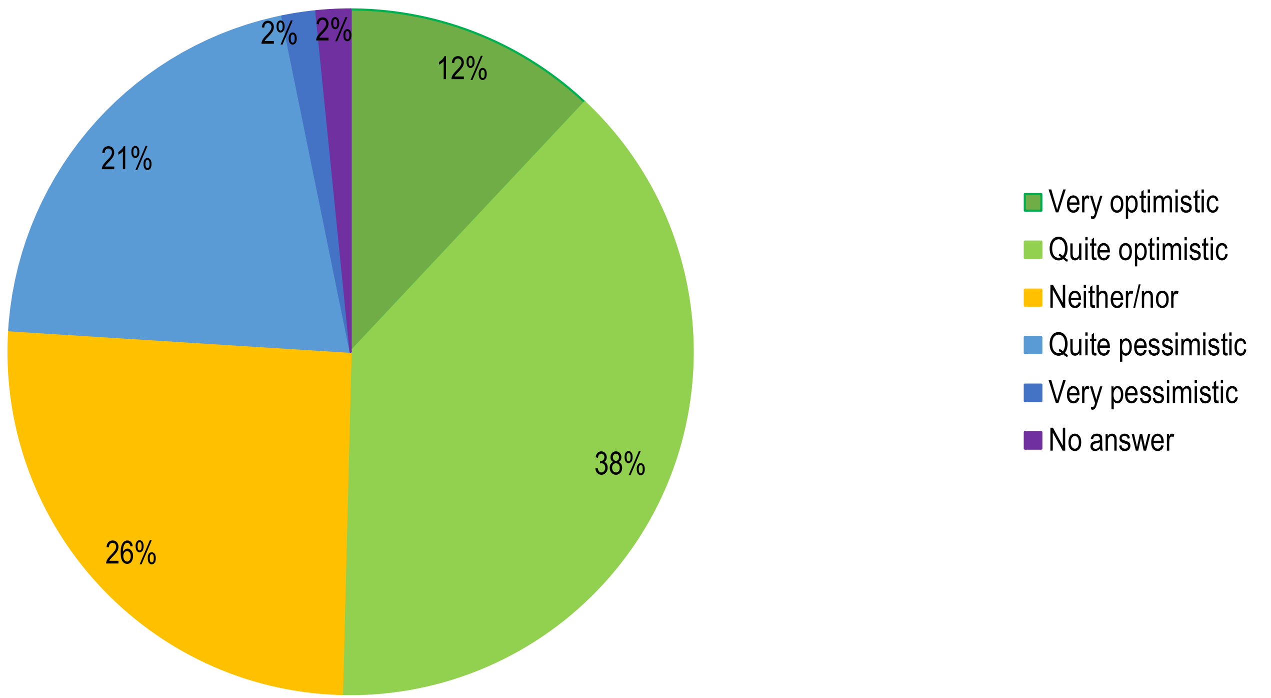
- Most retailers are positive about Norwich across most areas!
- In particular, they are happy to recommend it, find it an appealing place to visit, believe it is clean and pleasant and at slightly lower levels (but still positive) believe it attracts lots of affluent customers
- The only area which achieved a more ambivalent response was whether it was getting better each year

Year on Year Performance



- A mixed response, but still positive. Whilst more retailers were down than up, if up and level are combined, the majority of retailers are either trading up or level on last year

Future Optimism



- Majority of retailers are positive about the future, with a quarter unsure and a quarter pessimistic

Summary

- An excellent response overall, which suggests retailers are engaged
- Norwich clearly attracts consumers for multiple reasons
- Many of the those involve a regular and frequent visit pattern
- Respondents would like to see improved improvements in the offer available, consumer experience and better management of a few specific areas
- They would also like to see more choice, more footfall generating activity and better ‘delivery’
- Retailers are positive about their own trading performance, with most up or level
- Over half are positive about the future, with a quarter undecided and a quarter pessimistic

Retail Review

One Very Strong Shopping Centre

Chapelfield

- Strong tenant line up, especially anchor stores
- Light, bright and attractive environment
- Mix dominated by upper mass / mid market tenants
- Large unit sizes, many of them double height with excellent impact
- Excellent external F&B provision. Food court feels dated
- Great shopper facilities – parking, information, toilets
- Very good website
- Good events program. Strong CSR ethos
- Feels disconnected from core city centre
- Remote signage is ineffective

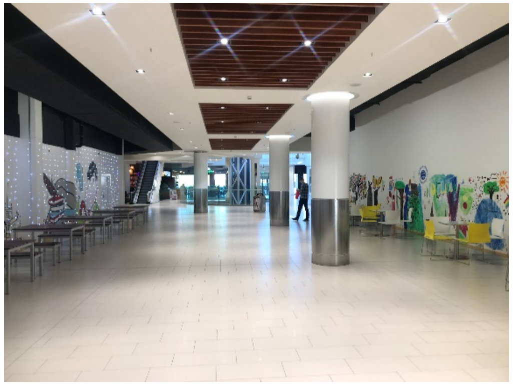
Two Underwhelming Shopping Centres

Castle Mall

- Bright and airy but very quiet!
- Vacant units being used creatively for 'entertainment'
- However lack of offer is a problem and appeal is limited
- Exciting redevelopment plans to add more leisure, F&B, youth appeal, fun
- Disconnected from city and adjoining castle / museum
- Good car parking

Royal Arcade

- Beautiful historic arcade, now lost its way
- Great location in heart of city centre
- Large vacant Jamie's unit dominates



Extensive Retail Choice

- Plenty of good shops
- Strong anchor stores
- Chapelfield dominates and has enhanced the offer significantly
- Good mix of mid market brands as well as value and mass market
- Plentiful choice of places to eat and drink! Lots with outdoor seating
- Offer is enhanced by its independents offer – lots of hidden gems
- Indie offer includes the quirky, unusual, contemporary, designer, 'health and wellbeing' – its broad
- Indie areas are occupied and busy!
- Award winning market, benefits from permanent kiosks and a consistent ' look' – front facing is well-merchandised and eye-catching, gloomy internally. Large number of vacancies reduces the 'feel and ambience' - opportunity for better signage, new tenants and more points of difference
- Choice is not the problem or issue

Lots of Hidden Assets

- Roads dissect the offer in places and can make it feel busy and noisy
- Directional signage (excluding Chapelfield) looking in need of replacing, opportunity to more clearly denote the offer; shopping, culture, Library, independents, etc.
- Meet main roads quickly, not very long runs of retail / F&B activity
- No clear retail circuit
- Pedestrianised areas and the centres are easier to shop
- Not promoting its assets
- Forum – potentially a tourist information / orientation point, not at the moment
- Overall signage and orientation could be improved
- Forum doesn't say 'Library' – Norwich ok if you're a local
- Banners could be used more effectively – messages are lost

Super and Distinct Environment – Needs a Polish

- Opportunities to tidy up public realm in places
- Combination of pretty cobbled areas and less attractive modern buildings and pavements (many looking dated!)
- Non-active retail frontages and service areas can be prominent in places and many used as cut throughs
- Shops are recessed under an overhang in places (e.g. London Street) – dark, restricting visibility and in stark contrast to Chapelfield's glass double height frontages
- Evidence of anti-social behaviour problems potentially and homelessness
- Streetscape is poor - lots of interference and clutter

Diverse Shopper Base

- A mixture! Mass market value seekers around St Stephens, more mass market in and around Chapelfield
- Students accommodation in the city centre will be helping the F&B and evening economy
- Sixth form / older students evident at lunchtime
- Lots of school children mid afternoon when they finish school, especially at bus stops
- Many tourists and visitors visible
- Language students also evident
- Large and high profile major employers; Norwich City Council, BBC, Anglia Television, Aviva

Underwhelming Sense of Arrival

- Park and ride feels a long way from the city centre (and not very heavily promoted)
- By road arriving from M11 visual first impression is not very attractive
- However accessibility by road (outside of peak hours) is easy and good
- Easy to see why Norwich dominates, there is very little nearby
- Good digital car park signs
- Good availability at John Lewis car park and Castle Mall – limited in Chapelfield at peak hours
- Current roadworks and temporary lights towards Castle Mall will be causing delay and disruption

Retail Review Summary

- Norwich City Centre is a city centre for local people
- Where's the welcome for visitors / tourists?
- Where does park and ride drop off?
- Poor welcome and route into town from train station?
- Where's the welcome, here you are – so you know you've arrived in Norwich?
- No central hub, where you know you are in the city centre
- Lack of welcome signage or anything to promote to visitors (and tourists)
- Has all the key ingredients; castle, cathedral, shops…
- Offer is not the problem
- No views / vistas, everything is hidden away
- Could do with knocking a few buildings down
- Promote city centre with lighting and streetscape initiatives
- Needs much more about the environment and experience

Retail Review Summary

- Needs good urban design and placemaking initiatives
- Buildings are hiding what's there, no clear view of anything
- Has cathedral and castle but not welcoming visitor market / customer
- 'Visit experience' is under- delivering
- Very pleasant in many places around city centre, yet also very unpleasant in parts
- Cathedral is in walking distance but city centre (shopping) doesn't seem to be appealing or welcoming to this visitor
- Strapline 'Norwich is a fine city' is an apt description – 'it's fine' / OK
- Not a landmark city in terms of its appeal and experience
- Lacking in terms of its environment
- What would happen if it had a serious competitor on its doorstep?
- Shame in many ways that Chapelfield isn't an open scheme – can't really 'see' Chapelfield either, it's hidden
- Everything seems hidden behind something

Stakeholders Discussions

Stakeholders Engaged

Completed surveys have been returned from the following stakeholders

- Robert Bradley - Castle Mall
- Paul McCarthy - Intu Chapelfield
- Graham Nelson - Norwich City Council
- Mike Burrell - Norfolk County Council
- Eric Kirk - Anglia Square
- John Adams - Jarrolds
- Francis Darrah - Francis Darrah Property Agents
- Richard Marks - JLP
- Claire Thomas - Boots

Strengths and Weaknesses

Strengths

- Width and depth of offer
- National multiple / Independents
- Events
- Cultural offer
- Compact centre / easy to get around
- Heritage & History
- Size of catchment
- Sense of place
- Castle, cathedral, museums
- Evening leisure / F&B offer
- High level of tourists and visitors
- City Centre Market
- BID

Weaknesses

- Traffic congestion
- Access by road and rail
- Anglia Square
- Clustering / zoning of offer is weak
- Critical mass of city centre retail has been stretched
- Chapelfield is disconnected
- Castle Mall / Anglia Square
- St Stephens / Exchange St / Castle Meadow
- ASB / Homelessness
- Air quality
- Lack of competition (less incentive to improve)

Opportunities and Threats

Opportunities

- Increase in city centre living / more students
- Better integration of evening economy
- Brexit / staycation
- More upmarket hotels
- Clustering of uses
- Better routing / signposting / wayfinding
- Improve public realm / sense of place
- Integrate retail elements
- Improve shopping / visit experience
- Walkability / walking routes

Threats

- Collapse of House of Fraser / Debenhams
- Reduction in office workers
- Declining perception of city centre as a result of difficult access / congestion
- Internet / online spend
- Economic climate
- Lack of innovation
- Lack of mid sized units
- Further improvement of Longwater Retail Park
- Lack of flexibility
- Too much retail space
- Amazon opening physical stores
- More ASB as a result in cuts in social care

Gaps in the Offer

On the whole, the majority of respondents felt the choice already available was sufficient. When prompted and pushed, the following responses were made

- Boutique cinema
- More leisure targeting youth market, e.g. bowling
- Conference centre
- Concert hall
- Boutique hotels
- Street food / food hall
- The only additional specific brand mentioned was Victoria's Secret

Improvements Needed to Consumer Experience

- Improve sense of arrival – by car and by bus
- Reduce congestion
- Target ASB – graffiti, begging, street drinking / sleeping
- Make it welcoming and safe
- Make it easier to find out what else is available in city centre / better wayfinding / better zoning
- Much better public realm in core shopping area

Benchmark Cities and Locations

- York (experience, well managed)
- Bath (public realm, street management)
- Brighton (effective clustering)
- Berlin (shopper trails and routing)
- Liverpool (quality of public realm)
- Chelmsford (clean and well policed)
- Swindon (pedestrianisation)
- Cambridge (cleanliness and routing)
- Copenhagen (ease of walking around, quality of shopping environment)
- Manchester (quality and effectiveness of mayor Andy Burnham)

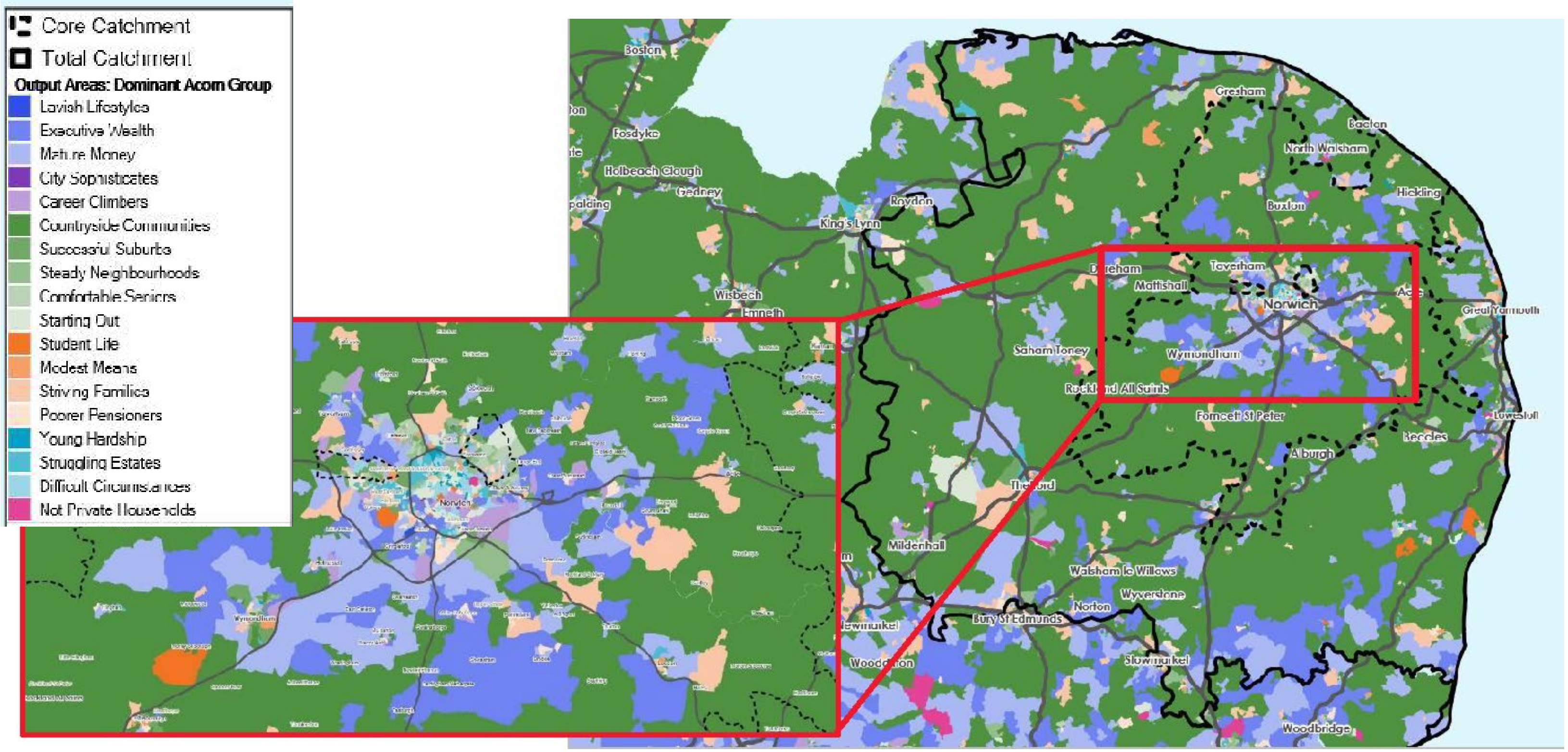
Ideal Future Norwich City Centre Offer

- Better working together needed
- More flexibility
- More temporary / meanwhile uses
- More pop-ups (retail and F&B)
- Better facilities for cyclists
- More people living in centre
- Less cars / more use of car clubs
- Clear plan for growth
- More activity and animation 18 / 6
- Much better and more memorable public realm
- Facelift every 5 years
- Better use of existing retail space / not new space

Future Customer Availability

Catchment Lifestyle Profile

The map below shows the Acorn profile of Norwich's catchment



Source - CACI

Catchment is Dominated by the More Affluent / Comfortable

- Acorn Profile of retail footprint compared to UK

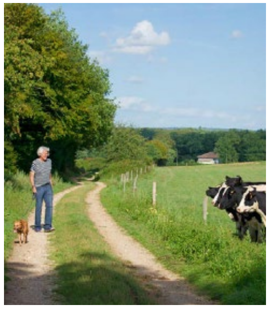
Acorn Category	Retail Footprint	GB Average
Affluent Achievers	24%	23%
Rising Prosperity	5%	9%
Comfortable Communities	42%	27%
Financially Stretched	18%	23%
Urban Adversity	10%	18%

- A substantial majority of the catchment are rural dwellers living a reasonably comfortable existence
- Further quarter of consumers are affluent older consumers living in Norwich's suburbs
- Profile and description of both groups is shown over next two pages

Source - CACI

42% Comfortable Communities

Gardening
Older than average Photography
Comfortably off Lower technology usage
Traditional Established high street stores
Walking Food All age groups

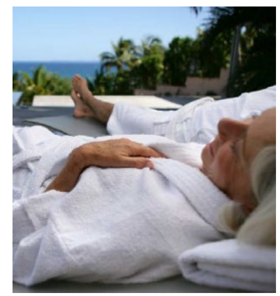


John Lewis
M&S
EST. 1884
DEBENHAMS
co op
LAKELAND

Comfortably off (not wealthy), mix of life-stages, seek out traditional brands

Source - CACI

24% Affluent Achievers



John Lewis

M&S
EST. 1884

next

NEW LOOK

PRIMARK

Discerning tastes, big spenders on leisure, high customer service expectations

Source - CACI

Norwich Summary Statistics

- Total resident catchment is 790,000 (circa 1 hour)
- Primary catchment is 390,000 (within 30mins)
- Spend in primary catchment is circa £1.5bn
- 29,000 students at University of East Anglia
- Norwich is ranked 13th in UK Retail Hierarchy
- Sales densities on average exceed national average by 9%
- No competing major conurbations

Source - FSP

Emerging Consumer & Retail Trends

Emerging Consumer Trends

- Consumers want experiences and / or multiple rewards / reasons to use or remember a centre
- Good quality public realm and art are integral parts of the experience
- Consumers seek reasons to choose a centre; they are looking for ease, value, quality, service, shopping as well as eating / drinking and leisure
- Shoppers are increasingly shopping by a variety / combination of multiple channels
- F&B usage is becoming more integral to shopping trips
- Shoppers like big stores **and** small specialists
- Consumers like events and markets which help to differentiate centres

Emerging Retail Trends

- Retailers like and benefit from multi-purpose centres; they both 'feed off' footfall and 'share' footfall
- Retailers are increasingly trading in multi-formats
- Retailers and town centres are opening later
- Retailers will choose out of town, if no suitable in town provision is available
- Measuring, monitoring and seeking to continually improve 'ease of use' will help ensure continued appeal
- Leisure offers are evolving and diversifying (including active and passive)
- Increasing need for more flexible space
- Centres need to engage with and embrace the towns (places) they operate in, forming strong ties with other attractors / destinations in the location

What it Means for ‘Retail’ Centres

- Successful city centres will have multiple reasons for use, not just be ‘retail centres’
- Adapting to changing consumer behaviour and retailers’ needs is paramount
- ‘Convenience’ is at the heart of the centre’s appeal – minimise deterrents
- Town, city and ‘retail’ centre ‘content’ will need to change, expand and evolve
- Many city centres currently have the wrong type of space
- Increasing flexibility will be important
- Local authorities need to ‘facilitate’ and stimulate town centre improvement
- Centres with strong local identities and stand out from the crowd
- Centres that build on established strengths and expand them will prosper
- Investment, proactive strategies, change management & collaboration all essential

Benchmark Locations

Approach

- A desk-based review of benchmark locations to understand their success factors and to mine information on their format, content and active retailers
- Locations included; Bath, Oxford, Cambridge and York
- Locations with a mid market resident base and additional consumer groups including visitors / tourists and students
- There are a number of trends in the benchmark centres that are relevant to Norwich and its future growth potential, these have been summarised

Exemplar Locations

- Multi-reasons to visit and clear, visible layers of appeal; leisure and F&B, plus facilities
- Clear statement with critical mass, collective and / or individual anchor operators
- Anchors – retail and non-retail – department stores, multiplex and boutique cinemas
- Public and open space; promotions / relaxation / events with well designed public realm
- More ‘open’ than covered
- High impact retail provision often with landmark retail statements and large contemporary glass frontages

High impact retail

F&B clusters

Exemplar Locations cont'd.

- High design credentials
- Range of high quality facilities as standard
- Customer needs focused; late night shopping, student shopping evenings, click and collect, shop and drop, mobile phone charging, free parking after 6pm, free Wi-Fi
- Well integrated and connected
- All have good quality and quantity of car parking; several underground

Bath, SouthGate

Oxford, *new* Westgate

Visual Reference Points from Benchmark Locations

Large scale, appealing and attractive

Visual Reference Points from Benchmark Locations contd.

Visible events, active and memorable

Lessons Learnt from Benchmark Locations

- Further inspirations include Derby, Leicester, Portsmouth, Bradford and Gloucester
- Multi-reasons to visit; with clear, visible layers of appeal; leisure and F&B, plus facilities
- Variety of well integrated anchors – retail and non-retail – department stores, multiplex and boutique cinemas, bowling, soft play, F&B clusters, varied F&B daypart offers
- Public and open space; promotions / relaxation / events with well designed public realm
- High impact retail provision often with landmark retail statements and large contemporary glass frontages
- Improving and high quality facilities, including improving markets, evolving and improving retail offer
- Include nearby or integrated residential elements
- Managed towns and centres; partners working well together; BIDs, TCM's and SCM's

Strong, improving and evolving

Overall Conclusions

Multiple Customer Groups to Target

390,000 **Residents** (30 minutes):

790,000 Residents (60 minutes)

Comfortable and More Affluent

Informed shoppers

Discerning

Quality, lifestyle, service, high experience, high expectation. Norwich needs to try harder

72,700 **Employees** (City Council Area – NOMIS 2018):

129,000 Employees in Norwich Total City Area

Regular visitors. Needs to be easy for them to pop in and out. Offer needs to change regularly. Frequent purchasers of food. Major opportunity to attract in after work

21,000 **Students** (2015):

15,000 at UEA

Increasingly living in larger numbers in the city centre

Looking for extended day offer. Increasingly less spend on alcohol focussed nights out but more play activity and culture

Circa 12,278,200 **visits** (2017)

11,834,000 day visitors:

£476 million day trip spend

£574 million total visitor spend

Accommodation, food & drink and retail are biggest spend categories. Typically affluent and discerning. Numbers are increasing

Existing Offer is Performing Well. Strong Base to Build on

- **Compact** city centre
- **Department store offer is super;** three major national operators and a quality local independent
- Good selection of major multiples
- **Excellent and improving independents offer**, close to the multiple and anchor offers
- The established culture, heritage, leisure and non retail attractions are many and varied
- An **established multi-purpose destination**
- **Many businesses are up or level** on last year
- **Operators are satisfied** with their performance
- **Retailers recommend Norwich** as a trading destination
- **Operators are positive about the future prospects**
- Primark redevelopment is massive vote of confidence

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Whole Offer is Difficult to Shop

- Many strong **assets are hidden / insufficiently visible**
  - both within city centre core and immediately adjacent to it
- Hidden assets include key anchor stores, shopping centres, Castle, Lanes, Cathedral, river etc.
- Its **easy to miss key elements of the offer**
- Conversely, many of the **weakest elements are highly visible**
- **Offer feels disparate and drawn out,** despite actually being fairly compact
- The actual **content of the offer is very strong**; the promotion and permeability of it is the issue

Whole Offer is Difficult to Shop cont'd.

- **The main shopping centres are inward looking** and located on periphery of retail core
- **Routing / sightlines within the city centre are poor**
- **Signage is poor**, especially from one zone or area to another
- Above **issues also apply to market** on local / micro scale
- **Connectivity to the non retail anchors** and attractions are poor
- Offer suffers from **lack of connectivity**

Current Consumer Experience Needs Improving

- Norwich **presents a poor consumer experience** in many parts of the city centre
- **Sense of arrival is poor**, especially outside train station and on Prince of Wales Road, bus drop off points
- Too many A boards on Gentleman's Walk, symptomatic of **too much clutter across city centre**
- Too many long term empty units / few pop ups and meanwhile uses
- Excessive graffiti, especially around The Lanes
- Visible chewing gum on pavements
- Bins getting cleared in middle of trading day!

Current Consumer Experience Needs Improving cont'd.

- **Poor standards of cleaning / maintenance**
- Many bins are visible from key walkways around city centre
- **Lots of visible street drinking** especially around market and square outside McDonalds
- **Pavement condition is poor** in many places around city centre
- Area in front of council offices feels very hard with excessive 'concrete'
- **The 'rest' areas and gathering / confluence points are amongst the poorest areas of public realm**
- Once 'in', the hidden assets the experience is better, **the connecting routes need significant improvement**

Gaps in the Offer Include

As identified, Norwich already benefits from a diverse mix and offer.

The gaps in the offer are focussed and limited as opposed to wholesale sectors / categories. Example areas where there are gaps include:

- **Upper mid market** offer, proven national operators that are missing from the Norwich offer
- **Menswear / childrenswear** operators to expand on the wider ‘family’ appeal
- **Food and convenience** stores to reflect increased top up shopping trends
- **More ‘street food’,** good quality and good delivery, younger consumer focussed
- **Quality dining** as destination attractors and to complement cultural and heritage attractions
- **Conference centre** facilities, as identified by stakeholders
- **Boutique hotels**, to support ‘staycation’, visitor and destination shopping
- **Boutique cinema**, to complement the successful family cinema offer
- **Urban leisure**, golf, climbing, cycle, air and kids play are all increasing city centre coverage
- **Leisure retail**, sports, lifestyle, active operators as well as more tourist / visitor brands

Study Recommendations

Recommended Future Vision

The future optimum Norwich City Centre offer will satisfy the needs and experience requirements of its various customer groups; it will deliver excellent service and celebrate the city's range of attractions and fantastic heritage.

The city centre will be an enjoyable, rewarding and memorable place to shop, dine, rest and enjoy.

Strategic Objectives

In order to deliver the vision of the optimum future Norwich City Centre offer, the following key strategic objectives will need delivering:

1. Improve visibility, access and impact of the existing assets and core retail components
2. Make it easier to visit and shop the whole offer – improve connectivity, routes and routing
3. Improve the shopping experience and environment
4. Identify opportunities to improve the wider public realm
5. Promote the variety and quality of the existing offer
6. Build on the already strong offer
7. More events and markets
8. Additional marketing and promotion emphasis

1. Improve Visibility, Access and Impact

The most successful retail offers are those that make it easy for the customer to see them, access them and buy from them.

Many of Norwich's key retail attractions, components and stores are hidden. Customers in the city centre will therefore often miss them and not buy from them.

It is crucial going forward we help the existing excellent assets to be noticed, visited and shopped

1. Improve Visibility, Access and Impact cont'd.

Includes both core retail components and other non-retail assets

Action	Priority	Timescale	Cost
Much better arrival signage at arrival points 'Welcome to Norwich – city of stories'	High	Short	Mid
Arrival points to include accessible information, physical and downloads, about regular offer and new attractions	High	Short	Mid
New legibility signage package covering both core retail components and other non-retail assets – from transport to shops, from assets to offers, from zone to zone etc.	High	Short	High
Improve gateways to city, e.g. top of St Stephens, bottom of Prince of Wales Road – declutter, deep clean, remove graffiti	High	Short	Low
More artworks, statements, street art at key arrival points (appropriate, changing and sympathetic)	Medium	Mid	High

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

2. Make it Easier to Shop the Whole Offer

More shopping purchases than not are impulse and not pre-planned. If a retailer successfully creates temptation, customers will often buy an item when they're either looking for something else or not even looking.

Equally consumers are increasingly visiting city centres for multiple reasons; shopping, leisure, work, social etc.

Its incredibly important we help Norwich consumers to use more parts of the city centre when they visit

2. Make it Easier to Shop the Whole Offer cont'd.

Action	Priority	Timescale	Cost
Designate and promote key walkways, improve the environment, sightlines and connectivity	High	Short	Mid
Zone city by theme, e.g. Museum quarter, Cultural area, Historic core, Prime Shopping, Eating & Dining. Use colour palette and iconography to illustrates and demarcate zones	High	Mid	High
Assess opportunities to improve permeability using existing assets e.g. River Walk, parks and green spaces	Medium	Mid	Low
Cross promote various components and assets to each other, share customers. Includes non retail components	High	Short	Low
Much better information provision at key arrival points about the wider offer and all components, include remote arrival points Park and Ride, station, airport	High	Short	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

3. Improve the Shopping Experience and Environment

Norwich's many customer groups are typically comfortable, affluent and discerning. They are experienced shoppers and want high standards of service.

When they visit Norwich they want a clean, rewarding and safe experience, which appeals to their 'feel-good' senses. They want to remember Norwich for its many strengths and often elements of unique appeal.

The experience, starts before arrival, lasts the whole visit and longer in the memory.

Lets make Norwich feel truly special

3. Improve the Shopping Experience and Environment cont'd.

Action	Priority	Timescale	Cost
Assess opportunities to reduce traffic congestion	High	Mid	High
Improve parking experience, promote and improve Park and Ride, parking info apps, in car park experience, water fountains, toilets (directions to), family facilities	High	Short	Mid
Remove A board clutter on Gentleman's Walk. Investigate digital / smart screen solutions	High	Short	Mid
Improve cleaning routines, City Clean team / hit squad to target same day graffiti removal	High	Short	Low
Encourage more restaurants across city centre	Medium	Long	Low
Encourage more external dining / tables and chairs	Medium	Short	Low
Review 'experience' for all user groups	High	Short	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

3. Improve the Shopping Experience and Environment cont'd.

Action	Priority	Timescale	Cost
Introduce licensed busker scheme, for public areas	Medium	Mid	Low
Provide free to use rest points and facilities	Medium	Mid	Mid
Increased visibility for police / security presence	Medium	Short	High
Enforce alcohol free zone across city centre	High	Short	Low
Move 'soup kitchen' out of core shopping area	High	Short	Low
Review bin clearing routines to outside peak shopping	High	Short	Low
Remove 'back of house' activities from peak shopper / visitor visibility areas, use 'green screens'	High	Mid	Low
Assess the exit routes and outbound journey	Medium	Mid	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

4. Identify Opportunities to Improve the Public Realm

Norwich has many fantastic examples of heritage and historic buildings and a few 'nice' places.

Unfortunately many of the key pedestrian routes and confluence points have some of the worst public realm in city centre.

Lets focus on making the busiest parts of the city centre the best in terms of public realm.

High quality furniture. Safe and well maintained. Well designed and clutter-free. Somewhere to enjoy. Memorable public art and statements. Positive front of mind memories of Norwich

4. Identify Opportunities to Improve the Public Realm cont'd.

Action	Priority	Timescale	Cost
Target location 1; high profile / footfall locations, e.g. Outside Chapelfield / Brigg Street, Hay Hill, Haymarket, Gentleman's Walk	High	Long	High
Target locations 2&3; connecting routes / arrival areas	High	Long	High
Undertake pavement audit to identify additional focussed improvement areas	High	Mid	Mid
Declutter the core shopping areas, old street furniture, non essential equipment	High	Short	High
Introduce more trees and greening, 'pocket park' and green screens, permanent and temporary / moveable	High	Long	High
Investigate funding opportunities for public realm improvements, e.g. High Street Improvement Fund, Lottery Funding, LEP	High	Short	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

5. Promote the Variety and Quality of the Existing Offer

Norwich already has a extensive ‘retail’ offer.

Many peer group city centres would give their right arm for its anchor store line up. Many of the stores in Chapelfield are best in class examples of retail delivery.

The Norwich independent retail offer is a proven asset, and is one of the largest and most extensive in the country.

Lets make sure everyone knows what’s where, how good, the choice, width, variety. Every time!

5. Promote the Variety and Quality of the Existing Offer cont'd.

Action	Priority	Timescale	Cost
City centre has established anchors, attractors and even zones / areas. Highlight the area content, based on the core attraction. Consistent approach with all stakeholders	High	Short	Mid
Use maps, street signage, public realm to identify and differentiate all areas	High	Mid	High
Create more themed trails that feature multiple areas of city centre, food, independent, health, vegan etc.	Medium	Mid	Mid
Focus on moving people around the city centre. More 'What to do in 24 hours / weekend' type guides etc.	Medium	Mid	Low
Create a new programme of 'operator of the year' awards. Different categories and themes, peer group and public votes	High	Mid	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

5. Promote the Variety and Quality of the Existing Offer cont'd.

Action	Priority	Timescale	Cost
Undertake review of market to identify opportunities to improve layout and permeability, reduce vacancies, attract new tenants, diversify mix, better promote the offer and improve housekeeping standards	High	Mid	Mid
Include frontages to market, all sides, as part of the market offer. Improved management regimes required	High	Short	Mid
Create linked trip opportunities between partner components of city centre offer, Culture to F&B etc.	High	Short	Low
Celebrate diversity of the existing strengths, Norwich has many elements not found in peer city locations	High	Short	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

6. Build on the Already Strong Offer

Given its size, width and depth of offer and relatively recent addition of significant additional retail floorspace, Norwich has few gaps in its offer.

We need to ensure however we don't become complacent and forget to target the gaps, attract new entrants to the UK and other good examples of rising 'retail' operators around the country. The offer needs to be kept fresh.

Encouraging and supporting more new independents is essential, as is provision of more meanwhile, temporary and pop-up uses

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6. Build on the Already Strong Offer cont'd.

Action	Priority	Timescale	Cost
Develop priority city target operators list, in conjunction with stakeholders, focussed on enhancing choice and experience, reasons to visit, complement existing offer	High	Short	Low
Expand range of leisure uses passive and active e.g. comedy clubs, wellbeing centres, 24 hour gyms, urban leisure, children's focussed activities / more for teenagers	High	Mid	Low
Encourage landlords to accommodate greater flexibility and more short term / meanwhile uses; shops + F&B	High	Short	Low
Expand range of health, beauty, day spa offers	Medium	Long	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

6. Build on the Already Strong Offer cont'd.

Action	Priority	Timescale	Cost
Indicative additional retail operators include Victoria's Secret, & Other Stories, Urban Outfitters, Pure Collection, Mint Velvet, Gant, Uniqlo, Decathlon, Ole & Steen Lagkagehuset, Kiehl's Since 1851, Anthropologie, Brora, Reiss, KuPP, Ollie Quinn, COS, Gymboree Play & Music, COOK www.cookfood.net, Steamer Trading Cookshop, Waitrose & Partners, Nespresso	Medium	Mid	Low
Indicative additional F&B / leisure operators include wahaca, Meat Liquor, The Stable Pizza·Pies·Cider, wasabi sushi & bento, Curzon, Junkyard Golf Club, Champneys Health Spa, Hotel du Vin & Bistro, The Pig Rooms & Kitchen Garden Food	Medium	Mid	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

6. Build on the Already Strong Offer cont'd.

Action	Priority	Timescale	Cost
Develop a Norwich City Prospectus to promote reasons to trade in Norwich, and identified opportunities	High	Short	Mid
Establish a register / guide to available units, to make it easier to choose to open store in Norwich next	High	Short	Low
Build on existing independents offer by creating a support package and structure for new emerging businesses	High	Short	Mid
Pro-active monitoring of growing retail businesses, to ensure Norwich is high on the list of future locations	High	Long	Mid
Norwich BID to participate in REVO and Completely Retail	Medium	Mid	Mid

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

7. More Events and Markets

Norwich has a nationally recognised and award winning open market. It also has a strong events program operated by the BID.

These are both assets to be build on and developed further.

Consumers (especially workers, families and students) love street food. A well curated offer provides different reasons to visit each week. It also appeals to the more affluent consumers that shop at artisan maker markets, farmers markets & food festivals.

More of the above please *(carefully integrated with and complementing the existing market offer)*

7. More Events and Markets cont'd.

Action	Priority	Timescale	Cost
Expand events programme to target key customer groups, shoppers, families, regional residents, workers, students	High	Long	Low
Identify multiple event locations around city centre, and locate events throughout city centre to attract consumers to all areas	High	Mid	Low
Encourage wider city stakeholders and attractions to develop events for the city centre, university, culture, heritage operators	High	Long	Low
Introduce additional visiting themed markets to expand market offer and to add layers of difference	High	Short	Low
NMTF; Norfolk Young Traders Market; street food, vintage, collectables, history fairs, farmers / producers, night markets	High	Short	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

8. Additional Marketing and Promotion Emphasis

There are so many strengths for Norwich to build on, from the range and depth available, stories, history, environment, size and profile of catchment and lack of nearby competition.

Citizens of Norwich clearly like it and typically choose to live there for a long time.

Despite all of these positives however, people seem to enjoy having a moan and talking Norwich down.

Lets focus on being positive, encouraging communities to share the love!!!

8. Additional Marketing and Promotion Emphasis cont'd.

Action	Priority	Timescale	Cost
Promote established strengths, accepted reasons to use, remind all consumer groups of what they like / use	High	Short	High
Positive promotion of all new initiatives to enhance customer experience, public realm, improved facilities, improved parking information, arrival points, park and ride activity	High	Mid	High
Encourage community participation / engagement in improvements, welcome / arrival points	High	Mid	Mid
Promote local retailer awards initiative, promote strength of independent offer	High	Mid	Mid
Promote diversity of offer, linked visit opportunities, build stronger local loyalty	High	Mid	Low
Work with all local media to 'talk city up' not down	High	Short	Low

Timescale: Short = 1-6 months; Mid = 6-18 months; Long = 18-60 months

Cost: Low < £3,000; Mid £3K - £10K; High > £10K

The End

The Retail Group

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