Anglia Square, Norwich – Retail Strategy Report

February 2018

1 Context and Purpose of Document

As part of the joint Weston Homes ("WH") and Columbia Threadneedle ("CT") redevelopment proposals for Anglia Square, much of the existing retail accommodation will be demolished and replaced with new retail and leisure accommodation at ground and mezzanine levels.

This document sets out the retail strategy for the new and existing accommodation. It has been prepared to inform the design development of the space and support the hybrid planning application by WH and CT.

An illustrative (i.e. not for approval) plan is appended to this document, showing the broad strategy for the ground floor space proposed.

2 Objective

To create a unique retail and leisure offer for this part of Norwich City Centre which, reflecting the role and function of Anglia Square as the principal element of the northern Large District Centre, serves the needs of its immediate catchment and existing and new residents. The retail and leisure offer is proposed to be complementary to the existing character of Magdalen Street as well as the new residential development and will form a critical part of the creation of a new 'quarter' for Norwich.

3 Norwich Retail Market Context

Norwich is an attractive historic City, and the largest of the major East Anglian centres. Norwich's catchment encompasses much of Norfolk and the northern part of Suffolk. Economic and demographic statistics for Norwich include:

- ACORN demographic profiling shows that Norwich's catchment population has a significantly higher than UK average proportion of the population characterised as Countryside Communities, as well as higher than average proportions of the population characterised as Mature Money, Starting Out, Comfortable Seniors and Poorer Pensioners.

- The Norwich population includes a particularly high proportion of the retired (aged 65+), with a particular under-representation of children (aged 0-14) and young adults (aged 24-44).

- The Norwich catchment is not particularly affluent, although this has improved more recently due to a fall in unemployment.

- Norwich is a key centre for finance, especially the insurance industry. Aviva is the largest private employer in the City.

Norwich is ranked 19th in the 2016 CACI UK for retail provision, with an available total catchment spend modelled at £794.5m. Norwich has an extremely captive shopper population, estimated at 351,268, taking a high proportion of the catchment market share due to the lack of accessible competition. Lowestoft is the top competing centre to Norwich, taking only 4.3% of Norwich's total market share.

Norwich already has a significant amount of retail and leisure floorspace in the City Centre, totalling c.220,000 sq m. While there is a high proportion of comparison retail (53%), there is a relatively low percentage of leisure services floorspace (26%) compared to its closest competitors of Nottingham (41%), Leicester (30%) and Bristol (38%). Vacancy rates are low at 8%, well below the retail PROMIS average (e.g. Nottingham - 12%, Leicester - 15%, Bristol - 11%). Retail accommodation in Norwich services a wide range of consumer requirements, including City Centre provision and accommodation on the inner and outer ring roads:

- The City Centre has two major shopping centres – intu Chapelfield and Castle Mall Shopping Centre, with further large scale pedestrianised comparison retailing.
- The rest of the City Centre is characterised by attractive narrow lanes and alleys, which create an inviting shopping environment. The retail core is spread across an extensive area which is predominantly pedestrianised, punctuated by a number of churches, public buildings and offices.
- Mass market leisure is dominated by the Riverside scheme, which also offers open (i.e. unrestricted) A1 retail on the adjacent retail park, as a Large District Centre. Castle Mall also provides a cinema and restaurants.
- Multiple bulky good retail parks/ stand-alone units are located on each ring road.
- All major food store brands have some form of presence in and around the City.
- Norwich has a slightly above average representation of fashion retailers, especially within the middle range of the fashion spectrum such as River Island, H&M, Topshop and Next.

4 Local Retail Market Context

Anglia Square is situated 1.1km (0.7 miles) to the north of the centre of Norwich City Centre, and while the overall Norwich retail market is of interest, the immediate retailing profile is of far greater significance to the Large District Centre which includes Anglia Square. Magdalen Street has a large number of properties held under fragmented ownership with predominantly independent retail occupiers; the quality of which tends to decline further north away from the retail core, particularly north of the ring road which is not helped by the break in retail provision under the flyover. South of the flyover, the retail provision is predominantly convenience-led, including a number of independent restaurants, hairdressers, charity shops, grocers and fabric shops.

North of the flyover and directly opposite the centre, there is again predominantly convenience led retail. There are two larger premises; a Rileys Sports Bar on the first floor across c.1,300 sqm, and a Roys variety store of c.2,000 sq m. Roys is a family owned group of stores, with nine across Norfolk and Suffolk; the Magdalen Street store also incorporates a Post Office. Other independent retailers nearby include Now-n-Then Antiques, Hannants Convenience Store, TSB Bank, Sahara Café, Haider Butcher, Moonlight Café, Subway, Price Right Discount Store, Swallow Computer Games, Mercury

Communications, Canary Hair Stylists and Spinners Amusements. The evening/ wet-led (Use Class A4) operators that are present include Rileys Sports Bar and a number of traditional public houses.

5 Existing Scheme Mix

Anglia Square functions well as a discount/ value led, Large District Centre servicing the immediate local population. The public realm and built environment is generally of poor quality, but void rates are relatively low and a number of tenants are long standing, successful local traders. The wider Site is blighted by redundant and defunct buildings, but the centre at its core serves a successful purpose for the immediate catchment. The cinema provides a dated but unique leisure offer, with little supporting other leisure in the vicinity.

6 Proposed Scheme Mix

A key purpose of the redevelopment proposals is to deliver a significantly enhanced shopping centre, complementary to Magdalen Street, and serving both the existing area and the new residential development.

The new retail and leisure accommodation will be much better suited to the needs of modern occupiers than is presently available at the Site. It will therefore provide improved space for existing tenants, and will be capable of attracting a more diverse range of tenants in order to ensure a viable future for Anglia Square, meeting the needs of local residents and visitors to the northern City Centre.
The extent and quality of the proposed residential parts of the redevelopment will largely drive the retail and leisure tenant mix. The likely number of new residents, together with the mixture of uses within the centre, provides a good opportunity for a higher quality offer than currently found locally, offering an improved experience for the local shopper, while retaining and enhancing the Large District Centre function of the scheme. The impact of an improved scheme would have a beneficial effect on the retail units opposite at Magdalen Street and across the wider centre (due not least to increased footfall during daytime trading and into the evening), which are likely to be improved over time following redevelopment. Columbia Threadneedle would seek to retain as many as possible existing tenants within Anglia Square, providing upgraded units where possible.

A clustering tenant mix strategy will be adopted. The Site has the ability to provide a wide range of interesting, different yet complimentary uses, which need to be accommodated in a logical and well-constructed manner.

7 Critical Design Considerations

- **Pedestrian Flows –** The scheme currently has a number of pedestrian entrances, and can be confusing to navigate. The main pedestrian approaches to the scheme are from Magdalen Street to the southeast, or from St Georges Street via the underpass to the south, as well as from the various surface car parks at the Site. On completion of the new scheme, pedestrian flow is likely to continue to flow into the scheme from Magdalen Street to the southeast via Sovereign Way, St Georges Street to the south (which will be strengthened by the new "at grade" crossing across the ring road), from St Augustines Street to the west, from Edward Street to the north, and from the new public multi-storey car park. These routes will be enhanced to drive the footfall through the Site necessary to achieve a vibrant and viable commercial scheme, but also increase flow of footfall into the City Centre via George Street.

- **A 'Two-Square' Focus –** The retail and leisure elements will be focused around two main squares within the scheme. The existing main square at the centre of the Site will be slightly reconfigured and will act as a focal point for the retail including a new foodstore. A second square to the west, will function as a hub for leisure including a cinema, restaurants and outdoor activity events. The squares will provide large and vibrant places for residents and visitors alike.

- **Core usages/ Anchors –** The area will provide a range of uses for the local population, in keeping with its designation as a Large District Centre. This is to include a range of retail occupiers, a new cinema, leisure operators including cafes, restaurants and bars, and a range of service providers such as gyms. The strategy for this scheme is to create a point of difference in the City, compared to the retail which is already present. The main anchors/ uses are proposed to be:

  - **Cinema – up to 3,000 sq m**
    The cinema should be a boutique, arthouse style offer, driving footfall to the centre and supported by other leisure provision, creating activity throughout the day and into the evening. The unit will be prominent, with its entrance on to the newly created leisure square. Evening access should be provided and encouraged.

  - **Foodstore – c.500-1,500 sq m**
    The foodstore should be of high quality with suitable 24 hour servicing, and dedicated adjacent car parking provided in the 600 space multi-storey car park. The store must be prominent, ideally within the retail square. The foodstore would be used by all age groups for a weekly or more regular shop, serving commuters passing by (such as those walking to/ from the City Centre or nearby bus stops) or using the multi-storey car park, and local residents (both of the new build residential accommodation and surrounding areas). The use of the foodstore would also encourage activity in the square into the evening. This enhanced evening pedestrian flow would improve the safety and security of the area.

  - **Leisure Quarter – 6-8 units, c.100-1,000 sq m each**
    The new leisure square would supplement the cinema use to provide a series of cafes, restaurants and bars. These would be open during the day and into the evening to encourage use of the centre all day. The leisure square and cinema will provide a focal point and hub to the scheme.

    The café, restaurant and bar operators located within the Leisure Quarter will be of a high quality, complementary to the cinema and the wider retail scheme being a mix of independent and national operators. There will be opportunities for pleasant outside drinking/ dining areas, to bring life into the square. There will be suitable refuse management systems in place for each operator.

  - **Services & Convenience Retail – c.8 units, c.50-250 sq m each**
    The services and convenience retail within the scheme will provide local retail uses to support the local community and the residents of the new build flats. Possible uses may include hair salons, barbers, newsagents, greengrocers, banks, pet shops,

pharmacy, etc. These tenants may also include click & collect facilities, servicing residents, nearby neighbours and shoppers.

- **Local 'Sui Generis' Retail Services – c.3 units, c.100-200 sq m each (up to 500 sq m in total)**
  The existing Anglia Square scheme includes a small number of Sui Generis retail services, namely nail bars and bookmakers, which serve an important local function and help to broaden the retail offer. The redevelopment scheme will provide opportunities to retain these types of retail services, alongside other retail and main town centre uses.

- **Comparison Retail – c.14 units, typically c.50-500 sq m each with c.2 larger units (c.1,250 sq m each)**
  Within the scheme, as at present, there will continue to be a number of comparison retail units including 1-2 larger units (such as the existing Poundland). These will be located around the retail square, on Sovereign Way and on Magdalen Street, and will sell a range of goods compatible with the Large District Centre function of the scheme.

  The provision of a range of unit sizes and formats will cater for different market requirements. Target tenants may have an existing presence in the City Centre which would almost certainly be retained, representing a more local offer at Anglia Square that in no way dilutes what is already available elsewhere in the City.

- **Lifestyle Retail – 3-6 units, c.100-1,000 sq m each**
  The cluster of lifestyle uses would include occupiers such as home furnishings, bathroom and kitchen retailers. A destination for quality home furnishings is not currently available in Norwich, and this could provide a useful service for the local community and the new residents. Quality services (Use Classes A2 and D1) could also be appropriate for some of these units.

- **Community Facilities – c. 3 units, c.50-600 sq m each**
  A mixture of community facilities (Use Class D1) within units shaded blue and green on the illustrative plan of the centre would be encouraged subject to demand, such as clinics, health centres, dental practices, crèches, art galleries, etc. These would serve residents and neighbours alike, and would improve the vibrancy and convenience-based function of the Large District Centre.

  N.B. all proposed areas stated are GIA and are indicative.