Great Yarmouth Borough & Waveney District

Household Survey: Final Report

Volume 3

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Private and Confidential

DTZ Consulting & Research
One Curzon Street
London
W1A 5PZ

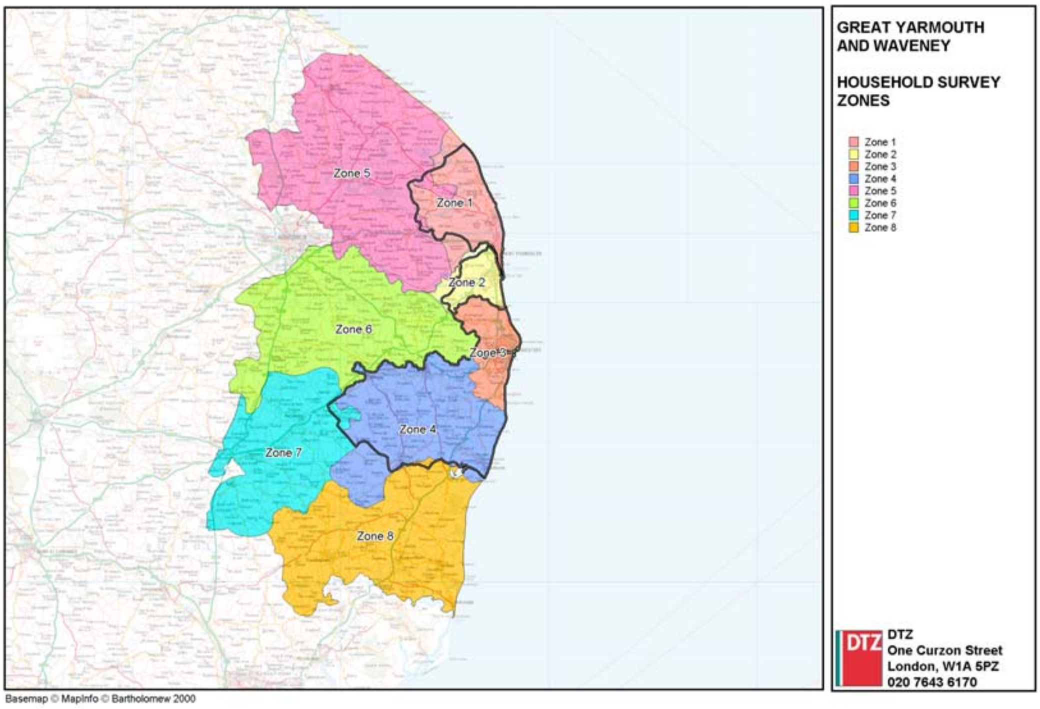
Contents

1 Household Survey Analysis

1.01 The methodology and headline findings of the household telephone interview surveys are set out below. For ease of reference, detailed tabulations are also contained within this volume.

1.02 The household surveys took place across eight zones between 25 January and 11 February 2006. The zones comprehensively cover Great Yarmouth Borough and Waveney District, as well as their hinterlands (**Figure 1.1**).

Figure 1.1: Household Survey Zones



1.03 For the purpose of our analysis, and in order to differentiate between the Great Yarmouth and Waveney study areas, two "core" zones have been created. Zones 1 and 2 cover Great Yarmouth Borough, whilst zones 3 and 4 cover Waveney District. The two core zones will hereafter be referred to as Core Great Yarmouth and Core Waveney. It should be noted, however, that due to the fact that the zones are based on postal sectors, the individual (and amalgamated) zones do not exactly match any borough/district boundaries. Zones 5-8 are defined as the 'outer' zone.

1.04 The outer zones are included to help determine the extent to which the study centres draw trade from outside their own immediate catchment areas. They also help to determine the relative impact of neighbouring centres on the market shares of the study centres. The individual survey zones were determined by the population distribution across the whole survey area, in combination with other critical factors including transport and access to reflect the main routes in and out of the study centres, as well as accessibility to larger competing centres. The zones are also designed to reflect the local authority boundaries of Waveney and Great Yarmouth.

1.05 The 1,000 interviews were split across each of the zones. The number of interviews per zone partially reflects the population levels and also the importance of the individual zones (i.e. whether core or outer). **Table 1.1** sets out the numbers of interviews and population for each of the eight zones. Subsequently, the results of the surveys have been fully weighted by the research company (Q2A) to reflect the size and characteristics of the underlying population.

Table 1.1:
Household Survey Zone Populations

Zone	Population 2001	Unweighted	Weighted Population 2001
1 – Gt Yarmouth North	43,222	150	113
2 – Great Yarmouth South	47,098	150	121
3 – Waveney North	76,764	150	197
4 – Waveney South	37,978	150	100
5 – North	82,915	100	219
6 – West	44,150	100	114
7 – South West	22,319	100	58
8 – South	30,326	100	79

Source MapInfo TargetPro / 2001 Census

2 Great Yarmouth Borough

Convenience Goods Shopping

2.01 **Table 1.2** confirms that Great Yarmouth Borough retains a high proportion (94%) of its market share for convenience goods shopping. The stores in out-of-centre locations are the most popular destinations for convenience goods.

Table 1.2 -
Convenience Goods Market Shares

	Core Gt. Yarmouth	Core Waveney	Outer
Great Yarmouth TC	6%	0%	0%
Gorleston	3%	0%	0%
District Centres	1%	0%	0%
Local Centres	12%	0%	0%
Non Town Centre	74%	2%	3%
Sub Total	94%	2%	4%
Waveney Centres	0%	23%	1%
Waveney Non Town Centre	2%	72%	8%
Sub Total	2%	95%	9%
Other Shops and Stores Elsewhere	2%	1%	85%
Internet, Mail Order and Other Home Shopping	0%	2%	2%
Total	**100%**	**100%**	**100%**

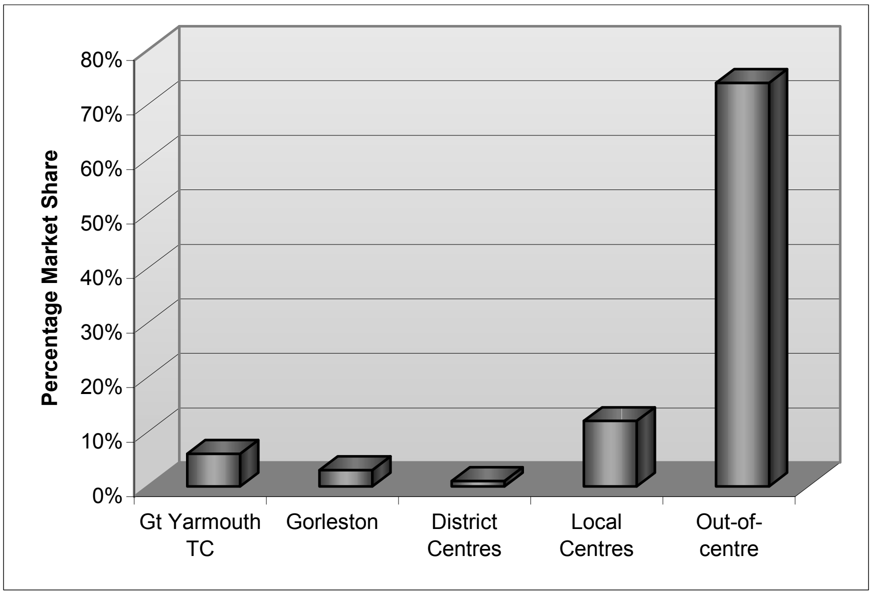
2.02 Other key trends for **convenience shopping** are as follows:

- **Stores within Great Yarmouth town centre retain just 6% of the market share within the borough**. This reflects the lack of major convenience stores within the town centre. There are, however, several edge-of-centre stores, namely Sainsburys and Aldi. These account for 77% of the market share.

- **Gorleston town centre and Caister district centre, like Great Yarmouth, account for small market shares (3% and 1%).**

- **Figure 1.2 shows that the most popular stores within the borough are out-of centre stores. Asda (Runham Vauxhall) and Tesco Extra (Pasteur Road) are the most popular**. These stores account for 25% and 20% of the market share respectively. These stores are the two largest in terms of floorspace, both having in excess of 85,000 sq.m gross floorspace.

Figure 1.2: Core Great Yarmouth Centres and Market Shares



- **Stores in Great Yarmouth draw only a limited level of trade from either the Waveney (2%) or the outer (3%) zones**. The out-of-centre stores, specifically Asda and Tesco Extra, are the only stores within Great Yarmouth Borough to account for market shares in either of these zones.

- **In terms of frequency of main food store visits, 87% of all people shop for convenience goods once a week**.

- **People in Great Yarmouth (borough) are likely to shop in Great Yarmouth more frequently, than those living in either core Waveney or the outer zone**.

2.03 **Volume 1, Section 3** demonstrates that there is good provision of convenience stores within the borough. The fact that the borough retains a high percentage (94%) reflects this provision.

2.04 It should be noted that national trends show that consumers do not tend to travel far for convenience goods shopping. The exception to this is those people living in rural areas where provision is minimal. These consumers are likely to travel further to reach stores, and will often choose stores with a greater offer. Tesco Extra and Asda are two examples of this within the borough, as both have significant convenience and comparison offers.

Comparison Goods Shopping

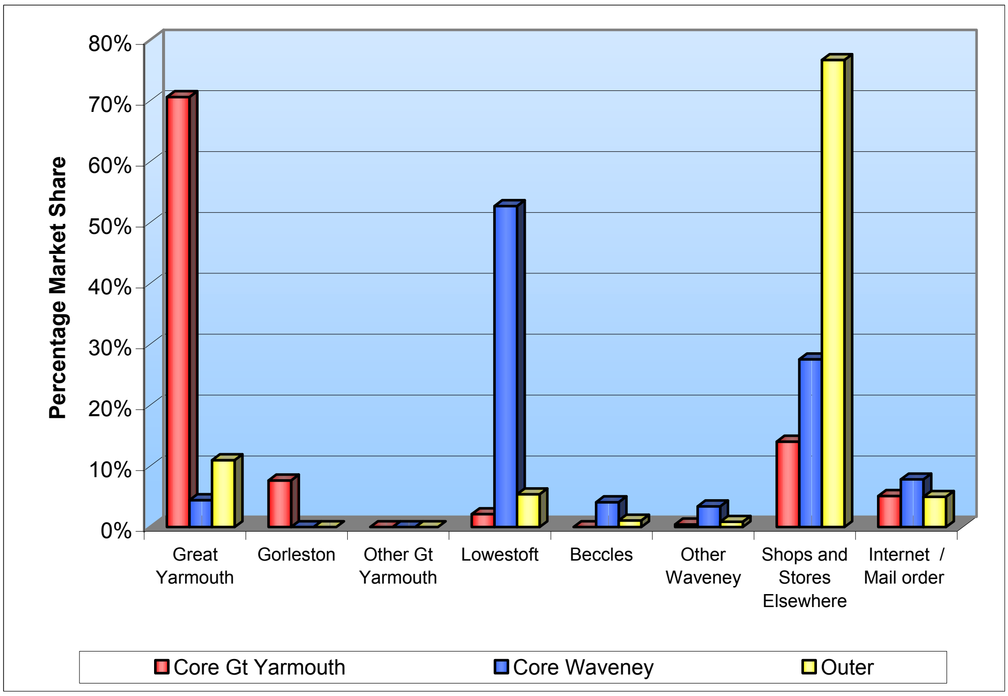
2.05 Great Yarmouth, is the most popular destination for comparison goods retailing for those people living within Core Great Yarmouth.

Table 1 .3 Comparison Goods Market Shares			
	Core Gt. Yarmouth	**Core Waveney**	**Outer**
Great Yarmouth TC	40%	3%	5%
Gorleston	4%	0%	0%
District Centres	0%	0%	0%
Local Centres	5%	0%	1%
Non Town Centre	33%	3%	5%
Sub Total	82%	6%	10%
Waveney Centres	2%	40%	5%
Waveney Non Town Centre	1%	29%	2%
Sub Total	3%	69%	7%
Other Shops and Stores Elsewhere	9%	20%	80%
Internet, Mail Order and Other Home Shopping	5%	5%	3%
Total	**100%**	**100%**	**100%**

2.06 **Table 1.3** shows that the town centre accounts for 40% of Core Great Yarmouth's comparison market share. The considerable amount of out-of-centre provision accounts for a further 33% of the market share. These market shares take into account clothing and footwear, electrical items, furniture and carpets and DIY goods. The key findings for the various comparison shopping categories are as follows:

- Great Yarmouth town centre retains a high market share for clothing and footwear items (71%). Gorleston town centre is also a clothing and footwear destination accounting for 8% of the Core Great Yarmouth market share. Despite out-of-centre provision in the large supermarkets, and the out-of-centre Next store, the out-of-centre locations do not account for any of the clothing and footwear market share.

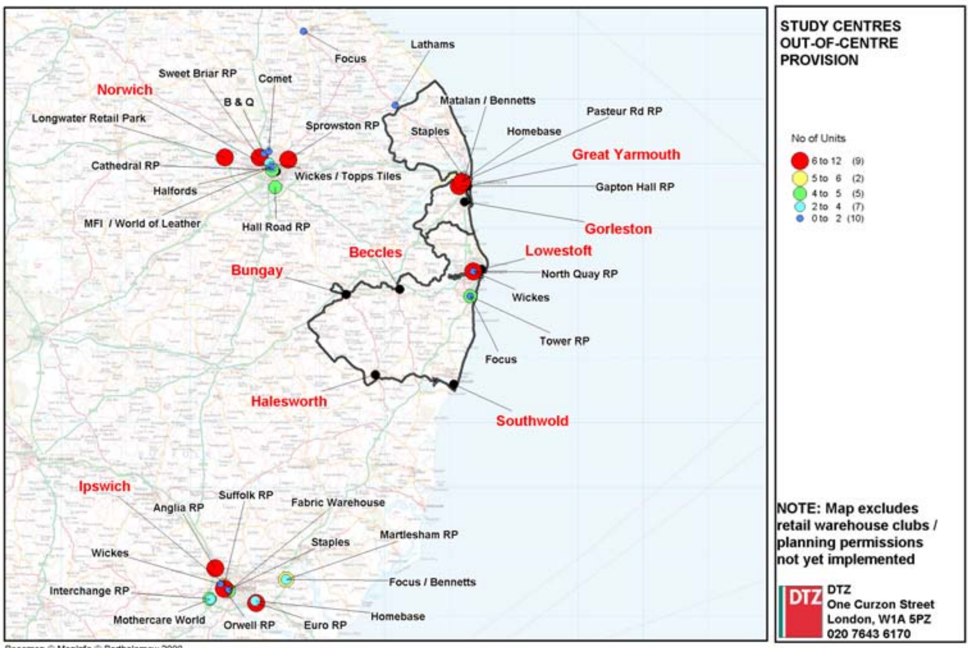
Figure 1.3: Clothing and Footwear Market Shares



- **Figure 1.3** shows that 14% of the market share leaks outside the Core Great Yarmouth zone, with the majority being attributed to Norwich, which has a significant level of comparison floorspace within the city centre.

- Great Yarmouth town centre accounts for smaller market shares in the case of larger items such as furniture, carpets and electrical goods. For these items the town centre accounts for 25% of the market share on average. For DIY items the market share is even lower at just 15%. The majority of market shares for these goods is attributed to out-of-centre stores. **Figure 1.4** shows the level of provision both in Great Yarmouth and Waveney, but also in Norwich.

Figure 1.4: Out-of-Centre Provision



Basemap © MapInfo © Bartholomew 2000

- Great Yarmouth town centre attracts lower market shares due to limited retail outlets offering these types of goods within the town centre. For items such as furniture and electricals, department stores are often a popular destination, however Great Yarmouth town centre lacks major department store representation (such as John Lewis, House of Fraser etc).

- The two key out-of-centre destinations are Gapton Hall Retail Park and Pasteur Road Retail Park. Gapton Hall is the more popular retail park for furniture items, whilst the modern Pasteur Road Retail Park is more popular for DIY and electrical items due to the B&Q Warehouse and the Comet store, respectively.

- The out-of-centre retail provision also draws trade from both the Core Waveney and outer zones. Between 5-10% of the market shares within these zones is attributed to out-of-centre retailing in Great Yarmouth.

Christmas and Special Occasion Shopping

2.07 Shopping trips at Christmas and for special occasion purchases often differ from 'normal' shopping patterns. Shoppers are more likely to travel further to higher order, more attractive centres for higher value special purchases.

2.08 The headline results show that Norwich is the most popular destination for Christmas and special occasion items attracting 32% of the overall market share.

2.09 The results show that the most popular reasons for visiting Norwich are the 'nice' shopping environment, the choice of department stores and the quality of stores on offer.

Great Yarmouth Improvements

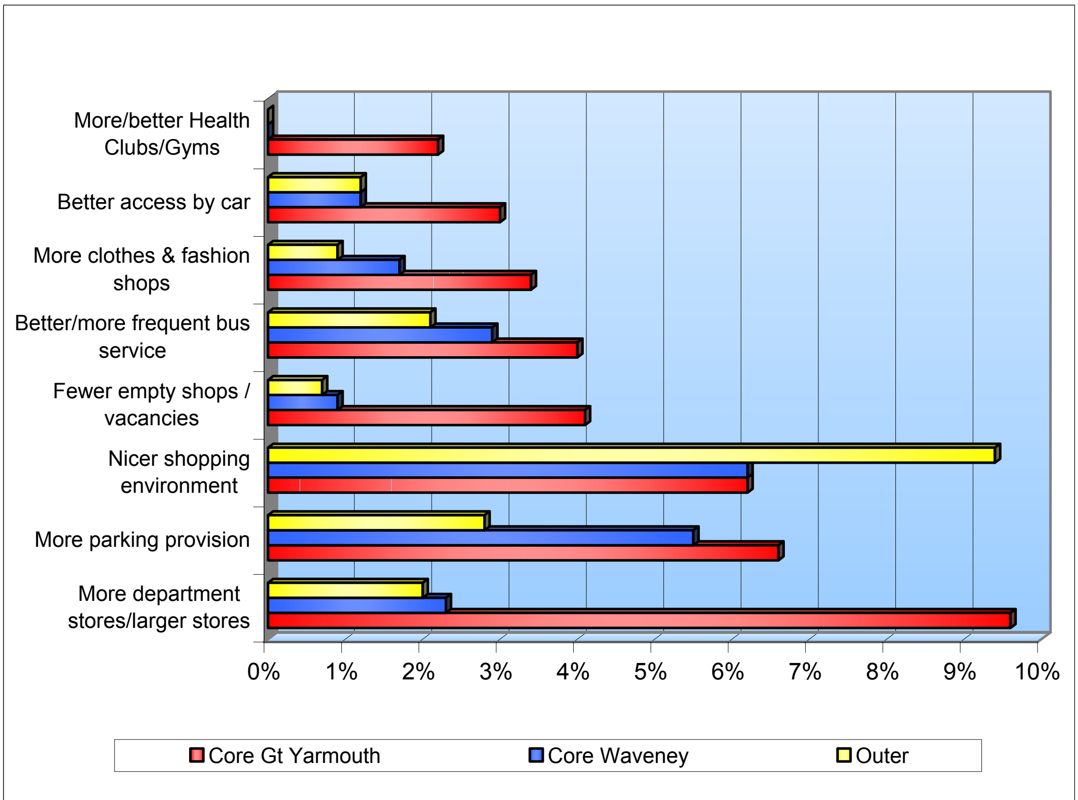
2.10 Respondents were also asked how often they visit Great Yarmouth (town centre), and what improvements to the town centre could be made to encourage them to visit more often.

2.11 Over 52% of people living within the Core Great Yarmouth zone visit Great Yarmouth town centre at least once a week. Outside the Core Great Yarmouth zone, the percentage of people visiting this often is less than 7%.

2.12 In the Core Waveney zone, 32% of people visit once a month or more often. In the outer zone, just 15% visit at least once a month. Over 37% of people in both the Waveney and outer zones stated that they never visit Great Yarmouth town centre.

2.13 **Figure 1.5** shows the most popular improvements suggested for Great Yarmouth (town centre). Car parking and accessibility issues accounted for over 18% of responses in the Core Great Yarmouth zone (and 12%/9% in the Waveney and outer zones). More car parking provision and better/more frequent bus services are the most popular improvements in this category.

Figure 1.5: Improvements to Great Yarmouth Town Centre



2.14 In terms of retail improvements, respondents would like to see more clothes and fashion stores (3%), fewer empty stores (4%), more covered shopping centres (2%) and a nicer shopping environment (6%).

2.15 Department stores and major variety stores act as major attractors to centres. This is reflected within the analysis of the results. These show that, in terms of retail improvements to the centre, 'more department stores' is the most popular single improvement to Great Yarmouth stated by nearly 10% of respondents in the Core Great Yarmouth zone.

Evenings Out and Cinema Visits

2.16 Assessing the quality and quantity of commercial leisure provision can be aided by determining where people go for evenings out to eat or drink, or where people visit the cinema.

2.17 Within the Core Great Yarmouth Zone, Great Yarmouth and Gorleston are the most popular destinations to go out to eat and drink, accounting for 32% and 8% of the market share respectively.

2.18 Despite the significant leisure provision in Norwich, particularly in the branded A3 and A4 sectors, the city only accounts for 8% of the market share within the Core Great Yarmouth zone. The results show that over 24% of respondents stated that they go out locally.

2.19 In terms of cinema visits, over 50% of people in the Core Great Yarmouth Zone stated that they do not go to the cinema at all. 30% of respondents visit the Great Yarmouth Hollywood Cinema, whilst 18% in Core Waveney visit the Lowestoft Hollywood.

Summary

2.20 The household survey shows that Great Yarmouth retains the majority of the market share for all types of goods within the Core Great Yarmouth zone, but only attracts limited market shares from the other zones.

2.21 The survey shows that there is very little in Great Yarmouth in terms of retail or leisure provision that attracts people from the Waveney or Outer zones.

3 Waveney District

Convenience Goods Shopping

3.01 **Table 1.4** confirms that the Waveney centres retain a high proportion (95%) of the market share for convenience goods shopping. The stores in out-of-centre locations are the most popular destinations for convenience goods.

Table 1.4
Convenience Goods Market Shares

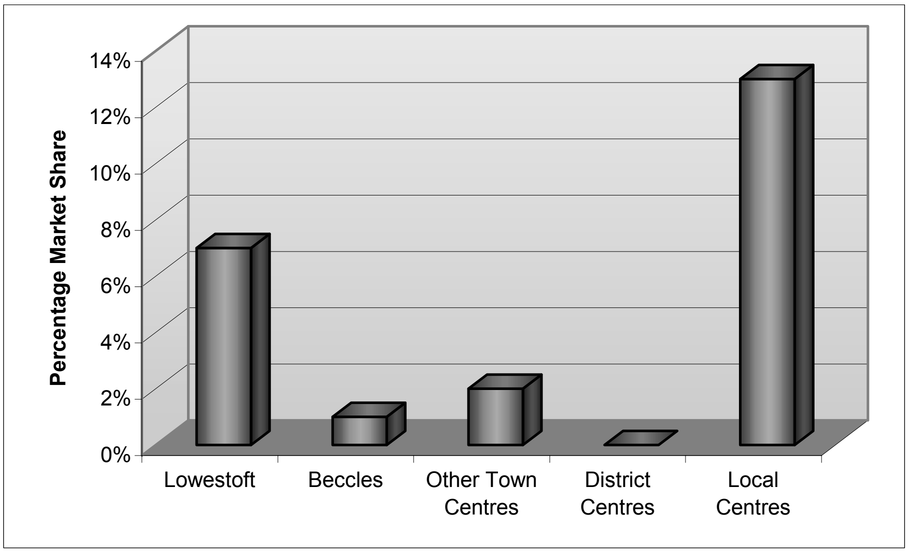
	Core Gt. Yarmouth	Core Waveney	Outer
Lowestoft TC	0%	7%	0%
Beccles	0%	1%	0%
Other Town Centres	0%	2%	0%
District Centres	0%	0%	0%
Local Centres	0%	13%	0%
Non Town Centre	2%	72%	8%
Sub Total	2%	95%	9%
Great Yarmouth Centres	21%	0%	0%
Great Yarmouth Non Town Centre	74%	2%	3%
Sub Total	95%	2%	4%
Other Shops and Stores Elsewhere	2%	1%	85%
Internet, Mail Order and Other Home Shopping	0%	2%	2%
Total	**100%**	**100%**	**100%**

Note: Figures may not add due to rounding

3.02 Other key trends for convenience shopping are as follows:

- **Stores within Lowestoft town centre retain 7% of the market share** within the Core Waveney zone (**Figure 1.6**).

Figure 1.6: Core Waveney Centres and Market Shares



- **The stores in the smaller towns (Beccles, Bungay, Halesworth and Southwold) only account for minimal market shares (less than 2%) within the Core Waveney zone**.

- **Overall the most popular foodstore is the Tesco store on Yarmouth Road**. The store accounts for 26% of the market share within the Core Waveney zone. The larger stores including Morrisons at Tower Road, Asda Horn Hill and Tesco and Morrisons in Beccles all account for significant market shares.

- **Stores in Waveney draw only a limited level of trade from either Core Great Yarmouth (2%) or the outer (9%) zones**. The Morrisons and Tesco stores in Beccles are the most popular stores for those living in the outer zone, due to the proximity of the stores on the border between the Core Waveney zone and the outer Zone. These individual stores account for 4% and 2% of the outer zone's market share respectively.

- **In terms of frequency of visits, 45% of all people shop for convenience goods once a week**, a further 40% shop more often.

3.03 It should be noted that national trends show that people do not tend to travel far to shop for convenience goods. Convenience stores are unlikely to draw people from a wide area unless their offer is significant and varied. The exception to this is in rural areas, where consumers, out of necessity, must travel further to reach stores selling a greater range of goods.

Comparison Goods Shopping

3.04 **Table 1.5** shows the comparison goods market shares for the hierarchy of centres within Waveney. It also shows the market shares that leak out to the Core Great Yarmouth and outer zones.

Table 1.5
Comparison Goods Market Shares

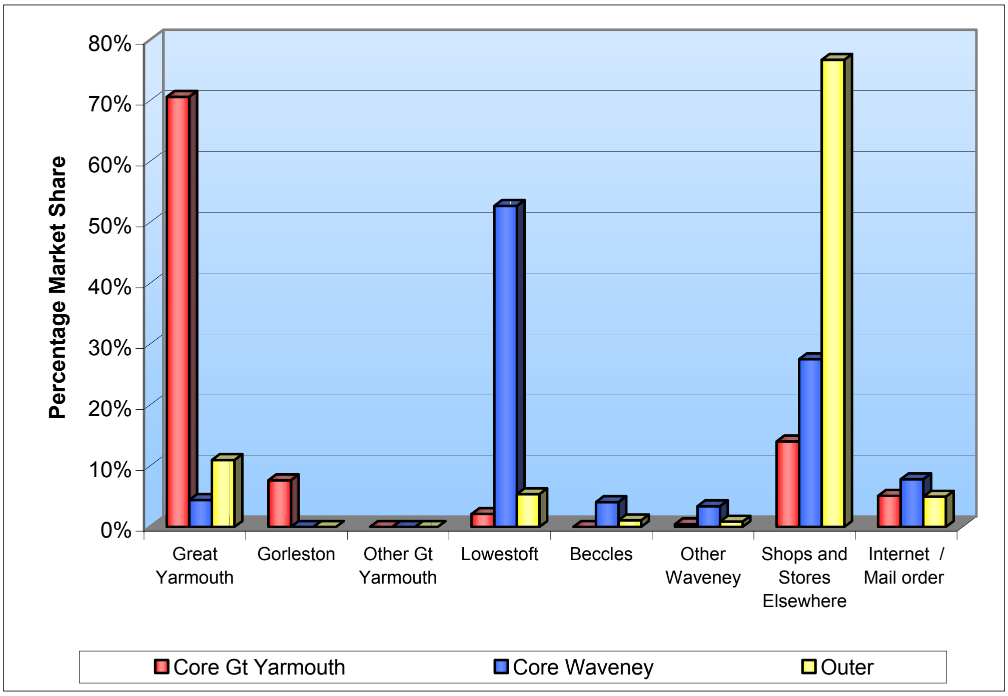
	Core Gt. Yarmouth	Core Waveney	Outer
Lowestoft TC	1%	21%	2%
Beccles	0%	5%	2%
Other Town Centres	0%	3%	1%
District Centres	0%	0%	0%
Local Centres	1%	10%	1%
Non Town Centre	1%	29%	2%
Sub Total	3%	70%	7%
Great Yarmouth Centres	49%	3%	6%
Great Yarmouth Non Town Centre	33%	3%	5%
Sub Total	82%	6%	10%
Other Shops and Stores Elsewhere	9%	20%	80%
Internet, Mail Order and Other Home Shopping	5%	5%	3%
Total	**100%**	**100%**	**100%**

Note – figures may not add due to rounding.

3.05 The market shares take into account clothing and footwear, electrical items, furniture and carpets and DIY goods. The key findings for comparison shopping are as follows:

- Lowestoft town centre retains 21% of the market share within the Core Waveney zone (for all comparison goods). The out-of-centre locations account for a higher percentage (29%).
- In terms of clothing and footwear shopping, Lowestoft town centre accounts for 53% of the market share in the Core Waveney Zone. **Figure 1.7** shows Lowestoft retains a smaller market share within its Core zone when compared to Great Yarmouth (which retains 71% of its core zone market share).

Figure 1.7: Clothing and Footwear Market Shares



- Overall, the Core Waveney zone retains 60% of the market share for clothing and footwear items, thus 40% is leaking to centres outside the Core Waveney zone. Just 4% of the market share is leaking to Great Yarmouth.

- The majority of the trade that leaks outside the core zone can be attributed to Norwich. The city accounts for 26% of the market share within Core Waveney.

- Overall, Core Waveney retains 40% of its market share for larger items such as furniture and electricals. The vast majority of this can be attributed to stores on North Quay Retail Park.

- The out-of-centre retail provision only draws a limited level of trade from both the core Great Yarmouth and outer zones. In these areas just 2% of the market share can be attributed to out-of-centre stores in Waveney.

Christmas and Special Occasion Shopping

3.06 Shopping trips at Christmas and for special occasion purchases often differ from 'normal' shopping patterns. Shoppers are more likely to travel further to higher order, more attractive centres for higher value special purchases.

3.07 The headline results show that Norwich is the most popular destination for Christmas and special occasion items attracting 36% of the overall market share, compared to 25% for fashion items. Conversely the market shares for Lowestoft fall from 53% for fashion items to 43% for Christmas and special occasion items. The market shares also fall for the smaller town centres for Christmas and special occasion items. Centres such as Beccles and Southwold account for 4% and 2% of the market share for clothing and footwear items, for Christmas and special occasion these market shares fall to 3% and 1% respectively.

3.08 The results show that the most popular reasons for visiting Norwich are the 'nice' shopping environment, the choice of department stores and the quality of stores on offer.

Lowestoft Improvements

3.09 Respondents were also asked how often they visit Lowestoft town centre, and what improvements to the town centre could be made to encourage them to visit more often.

3.10 Over 51% of people living with the Core Waveney zone visit Lowestoft town centre at least once a week. Outside the Core Waveney zone, the percentage of people visiting this often is less than 6%.

3.11 In the Core Great Yarmouth zone, 19% of people visit (Lowestoft) once a month or more often, in the outer zone, just 10% visit at least once a month. Over 50% of people in both the Waveney and outer zones stated that they never visit Great Yarmouth town centre.

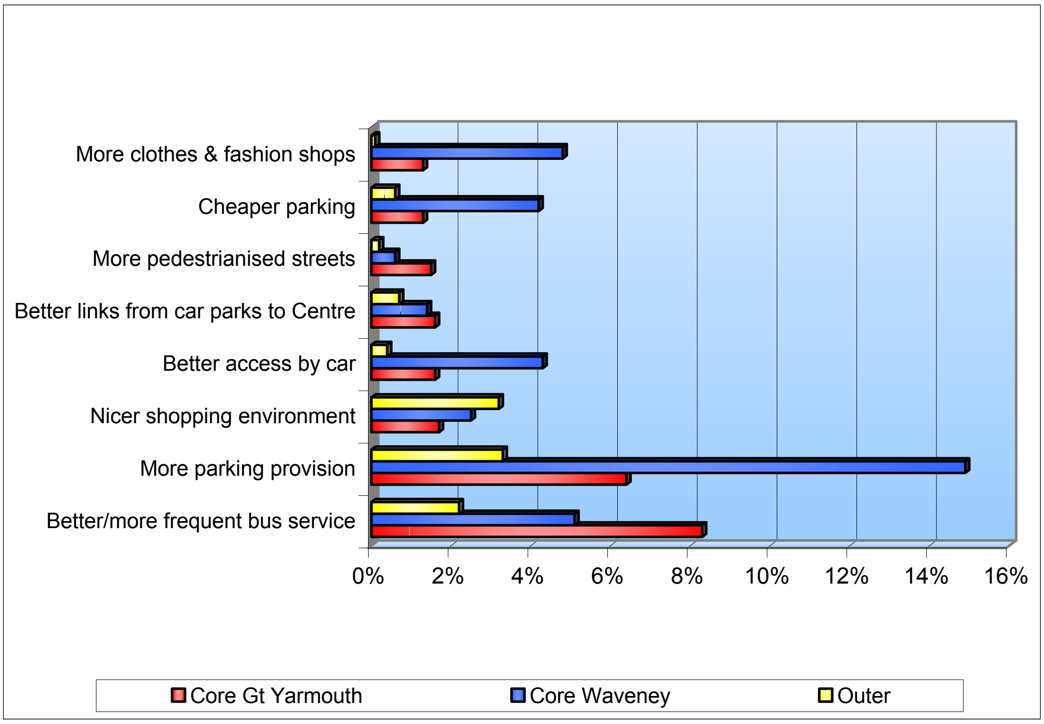
3.12 In the Core Waveney zone 25% of respondents did not think improvements were needed, whilst 17% did not know what improvements could be made.

3.13 Better access by public transport, in particular buses, was also identified as a key improvement, with 5% and 8% respondents in the Core Waveney and Great Yarmouth zones respectively identifying this particular improvement. In terms of retail improvements, respondents want to see more clothing and fashion stores (4%).

3.14 Department stores and major variety stores act as major attractors to centres. This is reflected within the analysis of the results. These show that in terms of retail improvements to the centre, 'more department stores' is also a popular suggested improvement to Lowestoft, stated by 6% of respondents in the Core Great Yarmouth zone.

3.15 The survey results show that car parking is a key issue in Lowestoft. Over 14% of respondents stated that more parking provision is needed within the town centre, whilst over 4% stated that parking should be cheaper (**Figure 1.8**). Respondents outside the Core Waveney zone also noted these as key improvements

Figure 1.8: Improvements to Lowestoft Town Centre



Evenings Out and Cinema Visits

3.16 Lowestoft and Beccles are the most popular destinations within the Core Waveney zone to go out to eat and drink, accounting for 20% and 7% of the market share respectively. Over 21% of respondents stated that they do not go out in the evening. Despite the significant provision in Norwich, particularly in the branded A3 and A4 sectors, the city only accounts for 10% of the market share within the Core Waveney zone. This fact is also reflected by results which show that over 30% of respondents stated that they go out locally.

3.17 In terms of cinema visits, over 47% of people in the Core Waveney zone stated that they do not go to the cinema at all. 18% of respondents visit the Lowestoft Hollywood Cinema, whilst a further 7% visit the Lowestoft Marina Theatre.

3.18 Those who travel outside the core zone tend to visit the UCI cinema in Norwich (19%), as opposed to travelling north to Great Yarmouth (2%).

Summary

3.19 The household survey shows that Lowestoft is a popular destination for those living in Waveney District. Waveney as a whole retains the majority of the market share for all types of goods within the Core Waveney zone, but only attracts limited market shares from the other zones.