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# Lowestoft

## *Understanding the Heart of Our Town*

Town Centre Baseline Report
December 2019

EAST SUFFOLK COUNCIL | LOWESTOFT VISION Business Led Business Focused | kba Kirkley Business Association | Lowestoft Town Council | LOWESTOFT RISING

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Town Centre Baseline Report
December 2019

Produced for
East Suffolk Council

*In association with*

*Lowestoft Town Council, Lowestoft Vision,
Lowestoft Rising & Kirkley Business Association*

*This report has been prepared by the People & Places Partnership Ltd. It is based on fieldwork undertaken in Lowestoft in February 2019 with assistance from East Suffolk Council and in association with the Lowestoft Heritage Action Zone, Lowestoft Town Council, Lowestoft Vision, Lowestoft Rising & Kirkley Business Association.*

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# Executive Summary

## Introduction

This report was commissioned by East Suffolk Council in association with the Lowestoft Heritage Action Zone, Lowestoft Town Council, Lowestoft Vision, Lowestoft Rising & Kirkley Business Association. The People & Places Partnership offers a proven track-record in evidenced-based, collaborative working for the revitalisation of town and city centres. In 2018 People & Places prepared new national guidance on revitalising town centres for the Local Government Association. These resources focus on helping local authorities and their partners to develop a 'Forward Framework' focusing on the 'what' and the 'how' of town centre revitalisation.

The process applied here has four key elements though the initial focus is on the first two:

- Analysis of existing strategies & stakeholders
- Town centre baseline survey
- Stakeholder engagement and partnership development
- Mentoring town centre action planning

The purpose of the report is understanding issues faced by Lowestoft town centre, the Old High Street and Kirkley to help determine future priorities for sustaining and enhancing the town's vitality and viability. It is intended to inform future partnership work and project development between public bodies, private businesses and community groups.

## The Policies

*District-wide town centres and retail policies*

The Waveney District Local Plan sets-out how the district's town centres will be vibrant and meet the needs of local residents, businesses and visitors alike. The Plan seeks to improve the District's cultural offer to the benefit of visitors and residents alike. Tourism will remain an important year-round part of the District's economy and visitor numbers and overnight stays will have increased.

District-wide growth targets are based on the findings of three contributing reports:

- The Strategic Housing Market Assessment identifies an objectively assessed need for 8,223 new homes;
- The Employment Land Needs update identified a growth of 5,000 new jobs over the period 2014-2036 in Waveney and has allocated more employment land than is needed (53.6 hectares) to achieve this;
- The Retail and Leisure Needs Assessment estimates that by 2032, there will be a need for at least another 2,197sqm of food store development and 11,063sqm of non-food types of retail development across the former district though most of this will be focused on Lowestoft.

The Local Plan also identifies the need for more restaurants and cafés, hotels, gyms and a new multiplex cinema to support a growing population across the District.

### Lowestoft-specific policies

The Waveney Local Plan includes ambitious and potentially transformative plans for Lowestoft. The Lowestoft area is expected to accommodate the majority of the former Waveney District's development over the next 20 years. Regeneration in Central and Coastal Lowestoft will deliver a significant amount of new housing as well as new economic development including new industry, retail and leisure. Over the plan period, in total, it is expected that the Lowestoft area will grow by 5,206 new homes. Lowestoft is also expected to take the largest share of new jobs created over the next 20 years. The Local Plan allocates 38 hectares of new employment land.

The Local Plan includes a suite of objectives for regenerating central Lowestoft that include specific reference to the Town Centre and Old High Street.

1. Improve connections and permeability within the area, including ensuring the third crossing supports connections through central Lowestoft and to the town centre, creating better pedestrian and cycle connections between the Broads, East of England Park and North Denes and South Beach through to Pakefield.
2. Create a better relationship to the waterfront, particularly along the south side of Lake Lothing.
3. Support Lowestoft Port and capitalise on the growth of offshore renewables and offshore related engineering.
4. Enhance the vitality and viability of Lowestoft Town Centre.
5. Bring back underutilised and derelict land into positive use.
6. Enhance the tourism offer of the area.
7. Enhance the quality of design, the public realm and the historic environment, particularly around the Historic High Street.
8. Deliver new housing in an accessible location bringing a better mix of tenures and types of housing to the area.
9. Reduce the need to travel by car.
10. Improve the natural, historic and built environmental quality of the area.

The Local Plan states that a strategy for the town centre area is also being prepared to provide further detail including land-use and non-planning measures to help improve the vitality and viability of the town centre. Investment opportunities recently provided through the award of Future High Street Funds and commissioning of a town centre masterplan, provide an added impetus for the delivery of proposals and regeneration of key town centre sites.

The Local Plan recognises that historic High Street is part of the North Lowestoft Conservation Area and exhibits numerous historic buildings, many of which are listed. However, the quality of the historic environment is under threat from insensitive development, poorly maintained buildings and a lack of investment. The detailed objectives for this area are for heritage-led regeneration with improved connectivity between the town centre, the High Street and the proposed East of England Parks. The area falls within the recently designated North Lowestoft Heritage Action Zone which aims to restore the old High Street's historic character for the people who live there and to boost tourism. Work includes providing quality spaces for the community, re-connecting the old town to modern Lowestoft, and bringing under-used and vacant land and property back into use for housing and retail.

The Local Plan also references specific plans for maintaining and enhancing the function of Kirkley as a local shopping centre and visitor destination. It describes how the area known locally as Kirkley Village Centre, will be protected and prevented from changing to other uses. It recognises that there is potential to increase the convenience food offer as well as the number of cafés and restaurants. The recent award of Hight Street Heritage Action Zone funding provides resources to enhance the heritage character of Kirkley Village along London Road in a way that increases its appeal to residents and visitors.

### Wellbeing

An important part of ensuring that town centres serve as a local community hub is reflecting on how they can contribute to improved local wellbeing. 'Wellbeing' has been described as "all the things people need in order to lead a good life". The recently published Being Well Together report sets-out the methodology behind the first UK-wide Community Wellbeing Index created by the Coop and the Young Foundation.

A summary of the Wellbeing Index for central Lowestoft is provided as a prompt for discussion about how the town centre can better serve as a stimulus for improved local wellbeing alongside consideration of the needs of identified socio-demographic segments.

Central Lowestoft scores highly in two of the three aspects of wellbeing relating to 'place' and is above the national averages for both of these indicators as might be expected for a large town centre. It has an average score for the third aspect relating to housing, space and environment:

- *Culture, heritage & leisure;* access to affordable and inclusive cultural and leisure activities, services and amenities which celebrate the diverse histories of people in the community.
- *Transport, mobility & connectivity;* access to affordable and sustainable transport and communication networks for everyone, especially those with disabilities.
- *Housing, space and environment;* affordable, secure, quality housing, a safe and clean surrounding environment, and well-kept, accessible and inclusive public spaces for people of all ages.

# The Process

The People and Places Town Centre Benchmarking System has been developed to address the real issues of how to understand measure, evaluate and ultimately improve town centres. The approach offers a simple way of capturing data on 12 Key Performance Indicators selected by those involved in town centre management. Importantly these performance indicators look beyond just retail and standard metrics to help consider the breadth of issues that it is necessary to understand, manage and monitor to improve wider town centre performance.

The survey work has been commissioned specifically for Lowestoft and uses quantitative and qualitative metrics that can be compared with national benchmarks for town centres.

# The Place

## Business composition

The business data for Lowestoft in 2019 indicates that a moderately high proportion of businesses in both the town centre (64%) and Old High Street (58%) are shops compared to 50% for other benchmarked towns nationally.  Of other businesses there are a significant number of professional and financial services (18%) in the town centre as well as restaurants and cafes (8%).  The Old High Street has a significant proportion of financial institutions (12%), restaurants/cafes (8%) and a high level of takeaways (5%).

In understanding the current composition and future potential of Lowestoft town centre and especially the Old High Street, it is instructive to understand the complementary role of Kirkley. Neighbouring Kirkley has a more diverse business mix with just over half of businesses being retail (49%) and a good mix of cafes/restaurants (11%), pubs/bars (6%) and take-aways (10%). Consistent with its resort status, Kirkley has a high proportion (13%) of hotels and guest houses.

The data indicates that a high proportion of shops in Lowestoft town centre are comparison retailers (93%).  Neighbouring Kirkley has a similar proportion of comparison retailers (91%). There is a greater proportion of convenience retailers in the Old High Street (19%) and this is comparable with large town nationally.

Whilst the percentage of comparison retailers indicates that overall Lowestoft is an established local shopping centre, it also suggests a continued vulnerability to competition from neighbouring centres and on-line.  It will be important for these shops to have a distinctive offer pitched at local customers and/or potential visitors.

The data for Lowestoft town centre indicates that it has a high proportion of key attractors (16%) and national multiples (39%) compared to other comparable towns.  Although the town centre has a low proportion of independent retailers (45%), with few regional multiples, this is offset by a high proportion of businesses that are independently-owned in the Old High Street (100%) and in neighbouring Kirkley (94%).

Lowestoft's market is very small despite a potentially prominent space that could draw shoppers to the start of Old High Street.  Going forward there is potential to look at revamping the space and offering to increase its appeal and attract footfall to the Old High Street.  Alternatively, there is space to accommodate a market in the town centre if it added to the quality of the experience to increase appeal in a way that benefitted neighbouring businesses.

## Vacancies, Footfall & Parking

The vacancy data for Lowestoft indicates a high level across the whole town.  Business vacancies are highest on the Old High Street (22%), where unusually it is challenging to determine if some businesses are trading as they are not all customer facing in a traditional sense or have irregular opening hours.  The town centre has a vacancy rate of 17% that is higher than comparable towns and appears impacted by both national chain and regional/local store closures. Kirkley also has a similarly high vacancy rate (17%) which is probably due to higher than normal closure and 'churn' of independent businesses.

Lowestoft's market is very small despite a potentially prominent space that could draw shoppers to start of Old High Street. Going forward there is potential to look at revamping the space and offering to increase its appeal and attract footfall to the Old High Street. Alternatively, there is space to accommodate a market in the town centre if it added to the quality of the experience to increase appeal in a way that benefitted neighbouring businesses. At the time of the survey there were only four stalls on Lowestoft market though it is understood this has increased to nine following the re-launch of a Saturday market. This compares to an East Suffolk average of only five stalls and 68 nationally for large towns.

The average Rateable Value for Lowestoft shops and cafes is £15,680 relative to £16,583 for large East Suffolk town centres. This represents a vast range of rateable values depending on the location and size of properties in the town centre from £510 to £198,000.

Indicative footfall data shows that Lowestoft town centre is busier compared to similarly-sized benchmarked towns nationally with 420 passers-by per 10 minutes on a busy day and 317 on a non-market day. This compares to 310 and 241 respectively for small towns nationally on a busy/market day and quiet/non-market day. Data collection included a Saturday as a sample busy day in Lowestoft whereas the norm is to use a mid-week market day as the indicative 'busy' day; this may have boosted the figure.

As with many towns, analysis of the data for other locations indicates that footfall in Lowestoft varies significantly between the different locations. This is especially marked looking across the three areas of Lowestoft. The town centre receives approximately ten times the footfall of the adjacent Old High Street and neighbouring Kirkley. This indicates that people are not migrating between these zones and that businesses in these quiet areas are not being exposed to the higher levels of footfall achieved elsewhere in Lowestoft. One of the challenges going forward is to understand how the town centre and Old High Street relate to each other in users' minds and the opportunities to encourage movement between these areas. In Kirkley the challenge is probably more to understand the potential for users to move between the seafront and London Road.

The data indicates that Lowestoft is a relatively easy place to find a parking space in on a quiet day during the week and at the weekend. There are 50% of spaces available on a busy day and 48% on a normal day. The distribution of spaces between car parks and on-street is typical of larger towns with the majority (93%) being in car parks. Lowestoft has a much higher proportion of long-stay parking than in other similarly-sized towns though this is in part due to how the tariffs offer both options. Taken collectively, this indicative data suggests availability of parking is not a limiting factor for the town centre or other areas of Lowestoft. More detailed analysis would be required to examine how the distribution around the town matches different users' needs; for example, there is an indication that there is slightly more pressure on long-term parking suitable for local workers.

# The People

## Stakeholder Responses

Survey forms were distributed to all the town centre businesses in Lowestoft, including Kirkley and the Old High Street (Heritage Action Zone). The following percentage figures are based on the 99 returned Business Confidence Surveys from a total of town centre 311 businesses. This is a moderate return rate of just under a third compared to 25% nationally and suggests a moderate level of interest within the town's business community. Part of the challenge in achieving a higher return rate was that businesses in the High Street in particular, did not all have regular opening hours. It is also indicative of a high percentage of multiple where managers are sometimes less able to respond to local surveyors.

Of the businesses that responded to the survey, around 60% were shops in all three areas. Amongst the town centre businesses, 82% of the respondents were long-established in Lowestoft having been based there for more than ten years. The businesses responding in the Old High Street (26%) and Kirkley (29%) had much higher proportions of businesses that had been trading for five years or less.

A large sample survey of survey of 120 town centre users were surveyed on-street, and a further 345 customers completed an on-line survey. As a result, the analysis given for Lowestoft is based a sample surveyed of 421 respondents. Online surveys were slightly different than the on-street surveys to pick-up infrequent users as will highlighted in the analysis.

## Business Confidence

In terms of recent business performance, it is discouraging that the average of the three areas (55%) said their turnover has stayed the same or increased in the last year compared to 71% nationally. Lowestoft town centre turnover has decreased significantly (60%) over the last year compared to the national average (29%). Kirkley (43%) and Old High Street (33%) showed slightly less but still significant levels of decline. Similarly, the proportion of Lowestoft businesses with reduced profitability in the last 12 months was also 60%.

Looking to the future, a lower proportion of town centre businesses (56%) expect turnover to go up or stay the same compared to 80% nationally. It remains a concern that a significant proportion (44%) of town centre businesses in Lowestoft surveyed expect turnover to continue to decrease in the year ahead. Businesses in the Old High Street are also pessimistic about the year ahead with 35% projecting a continued decline in turnover. Such seemingly year-on-year declines in performance suggest that this proportion of businesses may be particularly vulnerable to competition from elsewhere.

In contrast to other areas of Lowestoft, businesses in Kirkley are more positive about future trading prospects with 78% expected turnover to stay the same or increase and this is comparable to expectations nationally.

## Users' Profiles

The responses from the town centre users indicate a sample from this mid-week survey that comprises a modest average majority of females (57%). There was a good spread of age categories which are broadly comparable with national benchmarks although there were a significant higher number of over 65-year olds from the town centre online survey (43%) than the national average (16%).

Analysis of the age profiles for on-street and online town centre users reveals a much younger profile amongst online respondents with 51% under 45 years-old compared to only 32% of people surveyed in town. It is important to understand more about the different needs and customs revealed about this younger age profile of town centre users.

The figures for purpose of visit show that amongst the high town centre footfall a significant number are there to access services (27%) and for leisure (16%). There is an even split between comparison (20%) and convenience (20%) shoppers in the town centre which is distinct to trends in comparable towns nationally where convenience shoppers are more prominent. This may be due to an absence of large, town centre supermarkets.

The Old High Street users (43%) were largely in town for leisure; much higher than the national average (13%). Leisure is also the most popular reason for visiting Kirkley (28%) though it also has the highest proportion of convenience shopping.

A high proportion of mid-week users of the town centre surveyed on-street visit more than once a week (57%) that is comparable with other large towns nationally. In contrast only half of this proportion of the on-line respondents visit the town centre more than once a week (27%) and 36% visit once a month or less. This suggests a seemingly untapped market and perhaps the potential for an enhanced town centre and Old High Street offer to attract more loyal users. The Old High Street (33%) and Kirkley (28%) attract a greater proportion of daily users even when considering combined on-street and online respondents. (19%) while only 17% use the Old High Street daily.

A very high proportion (62%) of users came into town on foot, particularly high in Kirkley (72%) and Old High Street (70%), whilst 43% travelled on foot to the town centre. This is significantly higher than the national average of 31%. Conversely, on average less people travelled by car (23%) to the national average of 58%. A majority of town centre users (28%) on average spend in between £5 and £10 on a visit to the town centre, which is higher than the national average. A very small percentage in the Old High Street (5%), the town centre (5%) and Kirkley (0%) spend more than £50 which is significantly lower than the national average. Over two-thirds of the town centre users surveyed spend less than 2 hours in town and are therefore are fairly functional in their use of it, consistent with larger town centres nationally. Use of the Old High Street and Kirkley is almost exclusively limited to trips of less than two hours.

The figures for shoppers' origin for Lowestoft from this survey indicate that the majority of town centre users live locally and that 92% come from within 30 minutes of the town. This information suggests that local customers are the priority.

# The Positives and Negatives

## Positives

Businesses in Lowestoft town centre are most appreciative of the prospects for increased numbers of local (5) and tourist (67%) customers. This is similar for Kirkley (81% & 67%) and to a lesser extent for the Old High Street (61% and 48%). Cafes, pubs & restaurants are considered as complementary strengths in the town centre (50%) and Kirkley (54%).

Other than that, the aspects of Lowestoft town centre considered as positive by more than four-out-of-ten businesses surveyed are physical appearance (46%), public transport (46%), mix of retail offer 43% and seasonal economy (42%). Physical appearance is also viewed relatively positively by Kirkley (49%) and Old High Street (43%) businesses in a way that is comparable with large towns nationally.

Rental values/property costs (60%), the mix of retail offer, (49%), footfall (47%), seasonal economy (43%) and affordable housing (40%) are seen as positive by 46% of the businesses in Kirkley.

When asked about the positive aspects of Lowestoft as a whole, convenience (78%) ease of walking (70%), customer service (68%) and cafes and restaurants (58%) were all valued by town centre users. All of these levels of response are significantly higher than with other towns nationally.

Looking more at the detail between the different areas of Lowestoft, ease of walking (91%), value for money (84%), access to services (84%), convenience (84%) and customer service (82%), were highly valued by on-street town centre users. Online town centre users valued ease of walking (71%) and convenience (52%) though generally were much less positive in their perceptions of Lowestoft town centre.

Old High Street users valued convenience (90%), car parking (70%) and cleanliness (70%) most highly. Kirkley users valued ease of walking (89%), convenience (87%), independent shops (85%) and customer service (85%) as positive aspects.

As part of the on-line survey undertaken for Lowestoft, it was possible to separate out the perceptions of people who were infrequent users of the town centre and visited it fortnightly or less. These infrequent users echo others' frustrations with traffic (83%), markets (77%) and road links (73%), followed closely by leisure facilities (71%), retail offer (68%) physical appearance (68%) and parking (67%). There were also negative responses regarding independent shops (62%) and national chains (61%).

When asked if town centre users would recommend a visit to Lowestoft town centre, there was a wide range of responses between online and on-street users. Town centre (52%), Kirkley (94%) and Old High Street (67%) users said yes compared to 79% online users who would not recommend a visit to Lowestoft. Again, these figures indicate strongly that the town centre and these secondary areas do not appeal to a large and arguably, untapped local market.

## The Negatives

In terms of negative perceptions about being located in Lowestoft town centre, the main factors across all three areas are car parking (58% town centre, 53% Kirkley and 62% Old High Street), traffic (57% town centre and 55% Kirkley), rental values (58% town centre) and out-of-town competition (town centre 57%). Nationally, car parking (48%) and competition from the internet (47%) are generally considered as comparably negative aspects of town centres

In terms of negative perception from users, there were fewer responses than positives, with retail offer e.g. clothes, gifts (54%), parking (57%), physical appearance (52%) and retail offer e.g. groceries (52%) rating poorly with town centre users.

Town centre (66%) users interviewed on-street considered the physical appearance (61%), market (60%), traffic (59%), grocery shopping (57%) and comparison shopping (57%) as the most negative aspects. Online respondents were similarly negative about the market (72%), physical appearance (66%), comparison retail offer (64%) and traffic (65%) of the town centre, along with additionally independent shops (69%), leisure facilities (68%), cultural activities (63%) and car parking (56%).

Old High Street users were most critical about the convenience (63%) and comparison (60%) retail offers, access to services (60%), market (53%) and leisure facilities (50%).

Kirkley users rated access to services (83%) as by far their most negative aspect followed only by traffic (57%) receiving a negative review by over half of respondents.

Though a small proportion of these respondents were from further afield, the majority were local to Lowestoft and this give a sense of the sentiments of people who are less frequently using their nearest town.

Asked about their experience of Lowestoft, there were contrasting answers for different parts of town. When customers were asked to give one word that summed-up Lowestoft, there was a difference in opinions expressed between areas as shown in the resultant word clouds. Whilst only indicative, such word clouds are useful in understanding how the town is perceived by current users who are familiar with it. It can be helpful in determining how the town can be honestly promoted to potential new users in a way that creates achievable expectations as well as monitoring future changes in perceptions. For Lowestoft town centre the most prominent words are negative ad include rundown, tired, outdated and depressing. There is more of a balance in the most prominent words used for the Old High Street between positive points such as quaint, historic and good, and negative perceptions such rundown. The most prominent words for Kirkley are positive and include improved, improving, good, quaint and friendly, though there are also some less prominent negative sentiments.

When asked how the town centre had changed in recent years, 60% of on-street users and 77% of online town users said it had worsened. This compares to 19% and only 1% respectively who said it had improved. Half of respondents considered that the Old High Street had worsened (50%) compared to only 13% who thought it had improved. In contrast, over half of on-street respondents in Kirkley thought it had improved (57%) and only 11% thought it had worsened.

# The Priorities

## Stakeholder responses

When businesses in Lowestoft were asked what two things would improve the town centre, the top priority for 38% of the businesses related to parking, comparable in all three areas, with the highest percentage being Old High Street (41%), followed by Kirkley (38%) and the town centre (36%). Other issues mentioned were retail (15%), traffic and transport (15%), business rates, empty shops (10%) and improved marketing and events in the town (7%).

The comments on parking were varied but largely focused on increasing the provision of free parking to encourage shoppers into Lowestoft rather than shopping at out-of-town retail parks. Points raised around the need to improve parking facilities also highlighted the need to improve road and transport links through adding a third crossing in Kirkley and improving rural bus links. Addressing empty shops and lowering business rates were mentioned several times as well as increasing the number of events to help attract tourists to the town.

When customers of Lowestoft were asked what two things would improve the town centre, the overwhelming response related to retail with parking, improving amenities and traffic and transport following.

## Digital Development

As part of this baseline survey of Lowestoft, an initial 'digital diagnosis' was undertaken to understand development challenges and priorities. Similar sets of questions were asked to businesses and town centre users to assess the different priorities given to skills/services development and investment in infrastructure. This gives an appropriate framework for a broad perspective and to initially provide indicative and comparable information to help determine more in-depth research needs.

The responses show the current priority given by businesses to the take-up of digital skills and indicates a moderate though varied state of readiness in terms of digital skills. A moderate priority is given to the basic requirement of creating and maintaining a business web site. The highest average score for digital skills is given to the use of social media such as Facebook, Instagram and Twitter in business and product promotion with 57% of Old Hight Street, 50% of Kirkley and 44% of town centre businesses treating this as a priority or high priority. A lower priority is given to the more advanced digital skills necessary to provide on-line sales or use customer data for targeted marketing although these are treated as relative priorities (35% & 40%) by town centre businesses.

In contrast to the priority given to their own skills development, businesses give higher levels of priority to town-wide investment in digital infrastructure. The highest priority is given to Wi-Fi coverage with 63% of town centre businesses, 57% of Old High Street businesses and 50% of traders in Kirkley treating this as a priority or high priority. Town centre businesses (61%) and Old High Street businesses (57%) would like to see investment in providing improved digital phone network coverage.

Reviewing the opinions of on-street respondents for each of the areas, it seems that there is stronger demand from users for digital development than the priority currently afforded by businesses. Except for social media skills, customer demand is significantly higher than the priority given by businesses to development of digital services.

The on-street respondents give a significantly higher priority to the provision of digital services by businesses including the basics of web site provision which is considered a priority or high by 40% of town centre users. More advanced digital services such as online sales are considered a priority by 65% of town centre users and there is a high demand for social media insights (50%) that corresponds with businesses' priorities. The indication from this analysis is that regular on-street users with an older age profile have a higher demand for digital development than businesses anticipate. This would suggest that it is the in-town experience that is driving these customers to call for improved digital services.

The priority indicated by on-street respondents demonstrates that there is also a priority given to investment in town centre Wi-Fi and digital phone network coverage. Between 65% and 86% of users indicated the importance of the digital phone network and 54% to 83% responded that town centre Wi-Fi coverage would be useful to them as part of their visit.

Online respondents despite being self-selected as digitally engaged and having a younger profile, placed less emphasis on the importance of developing digital services. They gave their highest priorities to phone network coverage (57%) and the extra option of using technology to provide flexible parking solutions (59%).

# Local Leadership

Turning around a town or city centre is a complex and long-term venture and experience shows that it requires resources and leadership that should not be left to chance. This can be achieved by annually reviewing the checklist and updating a 'Forward Framework' comprising an over-arching strategy and two component plans:

## Business planning: partnerships & people

Revitalising a town centre is a complex and long-term venture and experience shows that it requires resources and leadership that should not be left to chance.

The form of an organisation refers to its set-up, structure, governance, partnerships and legal status. The form of a partnership should follow its function. Key determinants of this organisational form to consider include: the balance sought between being a consultative partner or can-do delivery body; available financial support and the need for independent fund raising; and close alignment with council policy verses the capacity to reach-out, engage with and empower sectors of the community.

There are many variations of the organisational models available for leading town centre revitalisation. Different options for organisational form include: council-led partnerships which coordinate activity and often inform policy; business-led town teams which can be very "can-do" and have a marketing focus; neighbourhood planning groups which can help shape future growth and its impact on town centre; development trusts which are very adept in managing community property; and BIDs which combine financial independence and business leadership. The appropriate organisational form is also likely to evolve over time and two organisations can work side-by-side with clearly defined roles.

An organisational business plan covering the foundations, form, folk and organisational finances will determine whether there is an effective and sustainable partnership able to deliver improvements. This organisational plan should define the inter-relationship and respective roles of partners such as the local authority, town council, business partners, Chamber of Commerce or a BID.

## Lowestoft town centre partners

In Lowestoft there is an existing and evolving network of partners that are already working together to contribute to local community and economic development. These partners include:

- East Suffolk Council
- Lowestoft Heritage Action Zone,
- Lowestoft Town Council
- Lowestoft Vision
- Lowestoft Rising
- Kirkley Business Association

It will be important that a long-term and robust partnership is put in place that makes best use of the different organisations' capacities, skills, interests and community engagement. This should involve ensuring that activity is coordinated across the different parts of Lowestoft with joint communication to partners, key stakeholders and the wider community. The People & Places Partnership has specialist experience of evolving such partnerships and is available to provide ongoing advice and support as necessary.

## Action planning: a timetable for change

A town centre action plan is necessary to determine and define objectives, projects, responsibilities, budgets, timescales, outcomes and impact measures as the building blocks of the coordinated delivery of improvements on the ground. The annual review of such an action plan should begin and end with a review of available evidence and the monitoring of impacts and changes.

This report provides a template for agreeing a town centre action plan for Lowestoft using the checklist of issues from the LGA Handbook on revitalising town centres and the evidence identified through the survey work. The table can be used as a basis for developing a detailed delivery plan by partners with budgets, responsibilities, defined outcomes and measurable indicators of success.

# Background: Revitalising Town Centres

## An East Suffolk-wide Approach

This survey and report have been prepared by the People & Places Partnership as part of a wider programme of town centre revitalisation work with East Suffolk Council. The towns included as part of this wider work are: Aldeburgh; Felixstowe; Felixstowe; Leiston; Saxmundham; Wickham Market; Woodbridge; Beccles; Bungay; Halesworth; Lowestoft.

People & Places undertook a survey of Southwold in 2017 that provided an evidence base for stakeholder engagement, the creation of a town centre strategy and submission of a £1.2million funding bid to Government.

The aim of the research and subsequent development is to help to identify strategic priorities and initiatives for the East Suffolk towns collectively or on an individual town basis. The research will be used to support East Suffolk Council's strategic direction regarding town's centres and to influence decisions and interventions through the following services: planning; economic development and regeneration; assets; active communities; housing.

The project aims to develop joined-up thinking across all stakeholders for town centres. The work can also provide an impetus for partnership working with local town councils, community groups and businesses associations in a way that helps to guide and monitor locally-led improvements. The research will consider the themes associated with the Future High Street Fund alongside other identified investment opportunities including digital engagement.

## Developing a Forward Framework

The People & Places Partnership offers a proven track-record in evidenced-based, collaborative working for the revitalisation of town centres. In 2018 People & Places prepared new national guidance on revitalising town centres for the Local Government Association. These resources comprise a new handbook and an accompanying online toolkit. They offer guidance to council leaders on how to approach the revitalisation of town centres and will be applied in this work.

The work of the People & Places Partnership focuses on helping local authorities and their partners to develop a 'Forward Framework' that focus on the 'what' and the 'how' of town centre revitalisation. Key elements to consider in preparing such a Framework are:

- Foundations: the process should be underpinned by an up-to-date review of existing strategies, collective objectives and evidence from recent surveys.
- Function: action planning should begin with a clear statement of identified issues; recognition of council and partners' roles; the creation of suitable responses; acknowledgment of gaps in delivery; and identification of impact measures.
- Form and Folk: next comes the development of appropriate organisational 'form' to coordinate activity including defining the roles of key partners and wider stakeholder engagement through 'folk'.
- Finances: financial planning needs to include identifying opportunities for fund raising, inward investment and partnership sustainability.

- Forward planning:  finally, everything gets written down as a 'forward framework' and regularly reviewed.

## Outline Methodology

The methodology used here has four key elements although the initial focus will be on the analysis of current ways of working and the baseline survey.  The approach can be adapted to the needs of the different towns whilst developing strategic consistency across the Districts.

### Analysis of Existing Strategies & Stakeholders

The work commences in each town with a desktop review and analysis of existing local reports and secondary data followed.  This is helpful in offering an objective survey overview, developing local engagement with businesses and other key stakeholders, plus agreeing the objectives and focus for further joint work.

### Town Centre Baseline Survey

People & Places uses its national town centre baseline survey process to help understand the role of each East Suffolk town centres as a retail destination and local community hub.  The purpose of this survey and monitoring process is to collect standardised key performance indicators (KPIs) to help local organisations and businesses to better understand the function, trends and issues facing a town and its potential relative to similar towns elsewhere.  Working in this way across all East Suffolk towns provide a unique opportunity to understand how the complement each other and provide a basis for future shared learning.

### Stakeholder Engagement and Partnership Development

Following on from the baseline survey work, People & Places are able to assist in identifying ways to encourage partnership working across all businesses/sectors and other key stakeholder groups in a way that contribute to town centre revitalisation.  This initially begins with a 'desk-top' review of the roles and activities of existing organisations.  These findings will form part of a subsequent summary presentation to stakeholders and could ultimately lead to the preparation of a partnership development or business plan.

### Mentoring Town Centre Action Planning

In parallel to the review of partnership development, People & Places can assist in mentoring stakeholder groups in project development and action planning.  Importantly this process links the understanding of issues identified by the survey, partnership development and the creation of suitable responses to identified, local issues.  This can be extended to assistance with fund raising for project delivery.

Ultimately the work is intended to help prepare a 'Forward Framework' for each town.  The table overleaf provides a checklist summarising the different components that will subsequently need to be addressed to prepare such a 'Forward Framework'.

| Town Centre Success Factors and Checklist | |
|---|---|
| FOUNDATION | |
| Evidence and objectives | Has a baseline survey of issues been completed, aims defined, objectives, scope and long-term monitoring of impacts agreed? |
| FUNCTION | |
| Parking, travel and access | Is an integrated and customer-focused parking, travel, and access strategy in place? |
| Planning and property | Are there robust town-centre-first policies, master-planning, priorities within and between towns and has work been coordinated with town centre businesses and landlords? |
| Streetscape and public realm | Has a funding strategy and ongoing, prioritised streetscape and public realm improvement plan been agreed with an understanding of 'connected value'? |
| Business support | Is there tailored training/mentoring and a strategy to enhance the quality and distinctiveness of retail, services, hospitality and leisure businesses based on current provision, trends and knowledge of competing centres? |
| Place branding and marketing | Is there a clear understanding of the town brand with pooled budgets and a creative, collective marketing campaign? |
| Digital technology and data | Is there an ongoing assessment of digital infrastructure and skills with an investment plan and approach for the collective use of data in marketing and monitoring the town centre? |
| FORM | |
| Governance and influence | Is there an appropriate structure, membership and credibility to coordinate local stakeholder activity and influence cross-departmental or other strategic partnerships? |
| FOLK | |
| Community engagement and coordination | Is there strong public, private and community engagement with active and coordinated involvement in planning and delivery that extends to community assets development and is backed by a clear communications plan? |
| Roles and capacity | Are there an effective chair, suitably skilled board, employment of necessary staff, effective management of trained volunteers and clear lines for joint working with other stakeholder groups? |
| FUNDING | |
| Finances and investment | Is there an organisation with robust financial procedures and strategy agreed for diverse and sustainable fund raising and income to support a town centre? Is it 'run as a business' with inter-relationships understood and investment secured? |
| FORWARD PLANNING | |
| Strategy and plans: | Is there a well-defined 'forward framework' comprising an overarching vision/strategy, a rolling organisational business plan and a parallel action plan coordinating delivery on the ground? |

# Analysis of Existing Policies & Strategies

## Local Plan Policies

**District-wide town centres and retail policies**

The Waveney District Local Plan sets-out background on the characteristics and challenges facing the former Waveney District. Waveney is considered an attractive place to live and work and more people migrate into the District from elsewhere in the UK than leave. Additionally, households in Waveney are getting smaller, so even with no population growth there is a need for more housing.

The long-term vision in the Local Plan sets-out how the district's town centres will be vibrant and meet the needs of local residents, businesses and visitors alike. The District's cultural offer will have been improved to the benefit of visitors and residents alike.  Tourism will remain an important year-round part of  the District's economy and visitor numbers and overnight stays will have increased.

The Strategic Housing Market Assessment identifies an objectively assessed need for 8,223 new homes over the plan period for the entire District (including the Broads Authority area), which equates to 374 per year. Of the 374 new homes needed annually, 208 need to be affordable to meet local need.  However, it is considered unlikely that this level of affordable housing could be viably delivered.

The Employment Land Needs update identified a growth of 5,000 new jobs over the period 2014-2036 in Waveney.  As well as jobs in the offshore sector, most jobs growth will be sectors such as health and social care, tourism, retail and construction.  Considering the jobs forecast and the past trends in take up of employment land, the study identifies a need for 43 hectares of new employment land development.  Like housing, the Local Plan has allocated more employment land than is needed (53.6 hectares).

The Retail and Leisure Needs Assessment estimates that by 2032, there will be a need for at least another 2,197sqm of food store development and 11,063sqm of non-food types of retail development across the former district.  Most of this will be focused on Lowestoft. Commitments since the study was completed, however mean that there is a remaining need for 6,946sqm of non-food retail over the plan period and 1,564sqm for food store retail development over the plan period.

The study also identifies the need for more restaurants and cafés, hotels, gyms and a new multiplex cinema to support a growing population.

**Lowestoft-specific policies**

Lowestoft has long been identified in the Local Plan as a priority area for regeneration within East Suffolk.  The Waveney Local Plan acknowledges that the town faces significant challenges with issues relating to poor economic performance and high levels of deprivation. These issues are at their most acute within the central parts of the town. It is these parts of the town which also have the greatest potential for positive transformation.

The Local Plan includes ambitious and potentially transformative plans for Lowestoft. The Lowestoft area is expected to accommodate the majority of the former Waveney District's development over the next 20 years. The key focus of the Local Plan is to continue the promotion of regeneration in Central Lowestoft and expand it to include coastal areas of the town.

Regeneration in Central and Coastal Lowestoft will deliver a significant amount of new housing as well as new economic development including new industry, retail and leisure. In total, land has been allocated in the Local Plan for over 4,000 new homes in the Lowestoft area. This is in addition to the 1,568 which currently have planning permission. Over the plan period, in total, it is expected that the Lowestoft area will grow by 5,206 new homes. Lowestoft is also expected to take the largest share of new jobs created over the next 20 years. The Local Plan allocates 38 hectares of new employment land.

The Local Plan includes a suite of objectives for regenerating central Lowestoft that include specific reference to the Town Centre and Old High Street.

11. Improve connections and permeability within the area, including ensuring the third crossing supports connections through central Lowestoft and to the town centre, creating better pedestrian and cycle connections between the Broads, East of England Park and North Denes and South Beach through to Pakefield.
12. Create a better relationship to the waterfront, particularly along the south side of Lake Lothing.
13. Support Lowestoft Port and capitalise on the growth of offshore renewables and offshore related engineering.
14. Enhance the vitality and viability of Lowestoft Town Centre.
15. Bring back underutilised and derelict land into positive use.
16. Enhance the tourism offer of the area.
17. Enhance the quality of design, the public realm and the historic environment, particularly around the Historic High Street.
18. Deliver new housing in an accessible location bringing a better mix of tenures and types of housing to the area.
19. Reduce the need to travel by car.
20. Improve the natural, historic and built environmental quality of the area.

The Local Plan states that a strategy for the town centre area (including the following themed areas; Retail Core and Enhanced Leisure Area, Peto Square Leisure Area, Historic High Street and Scores, Office and Town Centre Services Area and Town Centre Residential Area) is also being prepared to provide further detail including land-use and non-planning measures to help improve the vitality and viability of the town centre.

It adds that any Neighbourhood Plans and Neighbourhood Development Orders prepared in Lowestoft or Oulton Broad, can provide an opportunity to add further detail to these high level objectives and identify further specific development proposals to deliver them.

Investment opportunities recently provided through the award of Future High Street Funds and commissioning of a town centre masterplan, provide an added impetus for the delivery of proposals and regeneration of key town centre sites.

*Historic High Street and Scores*

The historic High Street and Scores form some of the oldest parts of Lowestoft. The area is part of the North Lowestoft Conservation Area and exhibits numerous historic buildings, many of which are listed. However, the quality of the historic environment is under threat from insensitive development, poorly maintained buildings and a lack of investment.

The area currently has a number of purposes. The southern end of the High Street around the Triangle Market is part of Lowestoft Town Centre and provides a secondary shopping area and a leisure focus with a number of cafés, restaurants and pubs. The area of the High Street to the north of Rant Score has more of a local shopping centre character, providing day-to-day provision to the surrounding residential properties. However, there are a number of unique shops and a couple of pubs and a restaurant which serve a wider population and visitors to the area. The Scores have a more mixed residential and employment purpose.

The detailed objectives for this area are for heritage led-regeneration which enhances the heritage experience of this area and supports the existing shops, cafés and restaurants. The aim is to have a strong heritage narrative with improved connectivity between the town centre, the High Street and the proposed East of England Parks including Ness Point.

The Local Plan acknowledges area falls within the recently designated North Lowestoft Heritage Action Zone. The key aims of the five-year scheme are to restore the old High Street's historic character for the people who live there and to boost tourism. Work includes providing quality spaces for the community, re-connecting the old town to modern Lowestoft, and bringing under-used and vacant land and property back into use for housing and retail.

Proposals for development within the area should be in accordance with policies on Conservation Areas. Historic shop fronts are recognised a key part of the character of the conservation area and these should be retained and enhanced as part of development.

*Former Battery Green Car Park*

The Former Battery Green Car Park occupies a prominent site facing on to the A12 at Battery Green Road. The former car park has recently closed due to serious structural deterioration and low demand from visitors and is currently being demolished.

The site, which sits within the town centre, offers a prime site for redevelopment for town centre uses that could accommodate a number of the development needs identified in the Retail and Leisure Needs Assessment (2016) including new comparison and convenience retail, leisure uses such as a cinema and a town centre hotel. Development of this type on this site will have a significant positive impact on the vitality and viability of Lowestoft Town Centre

Given the prominent location of the site, redevelopment will need to be carefully planned and designed. It will be particularly important to establish visible links and connections to the main pedestrianised London Road North and the Marina street. This will ensure the wider town centre will benefit from the development from linked trips. An active frontage should be provided along Gordon Road to ensure the street provides a welcoming link between the town centre, the development and employment uses on the proposed PowerPark.

*Peto Square*

The area around Station Square to the north of the Bascule Bridge provides a key gateway to the town with a historic townscape which benefits from a conservation area and a number of listed and locally listed buildings including the Grade II listed Customs House, the Tuttles Building and the Railway Station.

The area contains a number of secondary town centre related service, retail and catering businesses but suffers from the effects of through traffic on the A47/A12. It is expected that the effects of traffic in this location will be reduced once the planned third vehicular crossing is in place. The delivery of the third crossing is therefore essential to improving the general amenity and therefore the attractiveness of this area and the town centre as a whole to the market. The Retail and Leisure Needs Assessment (2016) states that Peto Square has the potential to accommodate significant new retail, leisure and mixed-use development over the medium to long-term. The Local Plan acknowledges that there remains potential for significant improvements to be made in this location and potential for new development which will support the town centre and complement the existing cluster of leisure uses in the locality.

Policies continue to allocate the area around Station Square and the Custom House for leisure and retail uses. The main objectives of the policy are to support and enhance the town centre, improve the general appearance of the area and protect the areas valuable heritage.

*Kirkley Waterfront and Sustainable Urban Neighbourhood*

The Local Plan sets-out how the proposed mixed-use redevelopment of the south side of Lake Lothing has the potential to transform Lowestoft and raise the profile of the town. The vision for this site is to transform it into a vibrant, inclusive community that is integrated with adjacent areas and provides access to employment, services and facilities in a high quality environment which maximises the opportunities presented by the waterfront.

Kirkley Waterfront and the proposed Sustainable Urban Neighbourhood currently comprise predominantly underutilised or underused brownfield land on the south bank of Lake Lothing.

The Local Plan states that much progress has already been made towards the regeneration of this area. Outline planning permission has been granted for 1,180 new homes, new retail centre, and leisure facilities, a playing field and a 1.5 form entry primary school. In the Riverside Road area, new offices have been constructed for Essex and Suffolk Water and East Suffolk Council and Suffolk County Council.

*Kirkley District Shopping Centre*

The Local Plan also references specific plans for maintaining and enhancing the function of Kirkley as a local shopping centre and visitor destination. It describes how Kirkley District Shopping Centre, known locally as Kirkley Village Centre, is located along London Road South between Parade Road South and Lorne Park Road. The Plan states that there are currently nearly 80 units within the area in retail or leisure uses and that Kirkley Village Centre has a good range of independent stores and cafés. Smaller convenience stores in the centre predominantly cater for day-to-day and top-up shopping.

The Local Plan outlines how the Retail and Leisure Needs Assessment (2016) and subsequent annual monitoring suggests Kirkley should continue to be identified as a 'District Centre' where shops and services will be protected and prevented from changing to other uses. The assessment suggests that there is potential to increase the convenience food offer as well as increase the number of cafés and restaurants to cater for the needs of the local population and the wider tourist market.

The recent award of Hight Street Heritage Action Zone funding provides resources to enhance the heritage character of Kirkley Village along London Road in a way that increases its appeal to residents and visitors.

## Demographic Details

### Suffolk Observatory

The Suffolk Observatory provides a wealth of data that can be accessed and downloaded on a ward-by-ward basis. This can be aggregated by combining the composite Lowestoft wards to give a Lowestoft-wide picture and similar data can also be accessed separately for the surrounding villages. This can be compared against UK-wide and Suffolk-wide averages to provide useful context in understanding new and existing town centre markets by age group, for example.

The Suffolk Observatory also provides access to Socio-demographic segmentation for the County's wards. These provide an indication of the needs and spending habits of the local population. These can be aggregated the data for the different Lowestoft wards.

### Wellbeing

An important part of ensuring that town centres serve as a local community hub is reflecting on how they can contribute to improved local wellbeing.

The recently published Being Well Together report sets-out the methodology behind the first UK-wide Community Wellbeing Index created by the Coop and the Young Foundation.

'Wellbeing' has been described as "all the things people need in order to lead a good life". The concept of 'community wellbeing' is less developed than the concept of personal wellbeing. In Being Well Together, community wellbeing is defined as "a collective feeling of leading a 'good life', shared and created by people and organisations. Community wellbeing is more than the sum of people's individual wellbeing; it is the relationships between people and with place". Building on this concept of community wellbeing, Being Well Together sets-out a model of community wellbeing comprising of three key pillars; people, place and relationships. Nesting within each of these inter-lapping key pillars are nine domains of community wellbeing that include characteristics such as economy, work & employment; culture, heritage and leisure; relationships & trust. Full descriptions of the nine community wellbeing domains ae given in appendix 2.

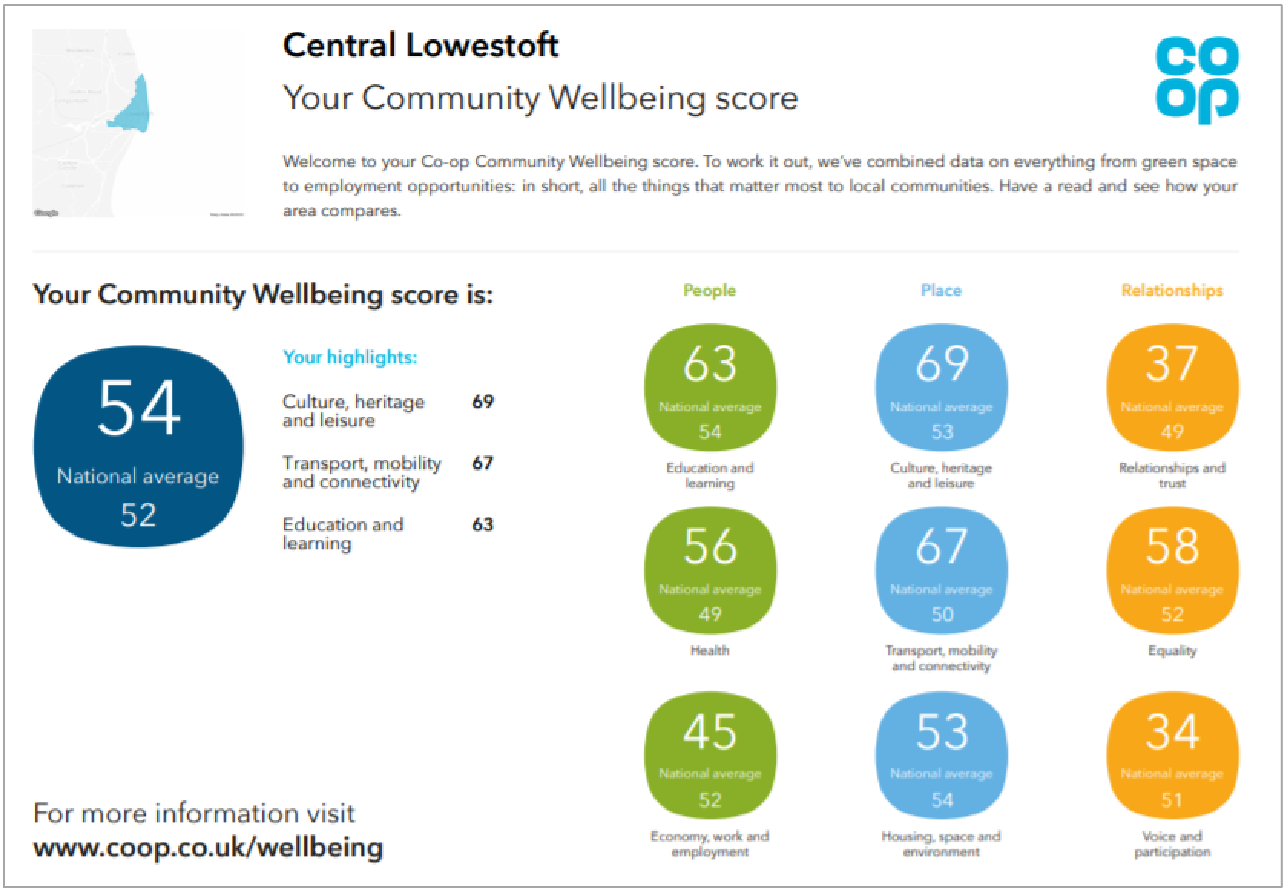
Being Well Together explains how using this structure, indicators were selected for each domain that represent the best data available at a neighbourhood level and the aspirations of communities consulted. The result is the first UK-wide indicator measuring community wellbeing in 28,317 neighbourhoods. Cleverly, the whole process has been simplified so that people can look-up the index for their community -or any other community- on the associated Community Wellbeing website.

As Being Well Together explains, the intention is that "for anyone looking at more place-based approaches to funding and interventions it provides a valuable baseline -and many opportunities to extend, evolve and bring in new data, not least from communities themselves." For town centre regeneration this provides valuable context about wider issues and the chance to reflect on inter-relationships and plan accordingly.

A summary of the Wellbeing Index for central Lowestoft is provided as a prompt for discussion about how the town centre can better serve as a stimulus for improved local wellbeing alongside consideration of the needs of identified socio-demographic segments.

Central Lowestoft scores highly in two of the three aspects of wellbeing relating to 'place' and is above the national averages for both of these indicators as might be expected for a large town centre. It has an average score for the third aspect relating to housing, space and environment:

- *Culture, heritage & leisure;* access to affordable and inclusive cultural and leisure activities, services and amenities which celebrate the diverse histories of people in the community.
- *Transport, mobility & connectivity;* access to affordable and sustainable transport and communication networks for everyone, especially those with disabilities.
- *Housing, space and environment;* affordable, secure, quality housing, a safe and clean surrounding environment, and well-kept, accessible and inclusive public spaces for people of all ages.



# Introduction: The Survey Process

### Focus on Lowestoft

This report was commissioned by East Suffolk Council. The purpose of the report is understanding issues faced by Framlingham town centre and future priorities for sustaining and enhancing the town's vitality and viability. It is intended to inform future partnership work and project development between public bodies, private businesses and community groups. The research and report forms part of a suite of work commissioned across all East Suffolk towns.

### The System

The People & Places Town Centre benchmarking system has been developed to address the real issues of how to understand measure, evaluate and ultimately improve town centres. The approach offers a simple way of capturing data on 12 key performance indicators (KPIs) selected by those involved in town centre management. By having the tools to measure baseline performance in this way, strategic decision-making is improved and future progress can be monitored. By understanding the baseline performance, forward strategies and action planning can be more focused and effective.

The system is divided into two sections:

- large towns; consisting of those localities with more than 250 units
- small towns; consisting of those localities with less than 250 units

Towns, depending on their size, contribute to either the large or small-town analysis. Lowestoft with 311 business units across the three areas surveyed is classed collectively as a large town. The analysis provides data on each KPI for the town individually and in a national context for comparison. The national figure is the average for all the large towns which participated in benchmarking during the last five years.

### The Reports

The baseline report provides statistical analysis of each of the KPI's. Individual towns are encouraged to add their own commentary using local knowledge to provide specific explanations. The reports are used by a variety of key stakeholders such as local authorities, town and parish councils, local partnerships, Town Teams, Chambers of Trade, BIDs, Neighbourhood Plan groups to help:

- provide baseline data to understand individual town centres issues
- identify strengths, weaknesses, and opportunities for improvement
- assist in preparing local action plans to address identified issues
- monitor impact of local town centre regeneration over several years
- benchmark towns clusters and share good practice
- act as an evidence base for funding applications

Before any KPI data is collected the core commercial area of the town centre is defined. The town centre area thus includes the core shopping streets and car parks attached or adjacent to these streets.

### Methodology

Each KPI is collected in a standardised manner as highlighted in the table below. Here is a summary of KPIs collected here as part of the core economic benchmarking process as well as an outline of additional benchmarks charting the wider social and economic value of town centres:

| KEY PERFORMANCE INDICATOR | METHODOLOGY |
|---|---|
| **Core Economic Indicators** | |
| The Place: Commercial Units | |
| KPI 1: Use Class | Visual Survey |
| KPI 2: Comparison/Convenience | Visual Survey |
| KPI 3: Trader Type | Visual Survey |
| KPI 4: Vacancy Rates | Visual Survey |
| The Place: Cross-town Trends | |
| KPI 5: Markets | Visual Survey |
| KPI 6: Average Rateable Value | Valuation Office Agency/ Local Agents |
| KPI 7: Footfall | Survey on a Market & Quiet Day |
| KPI 8: Car Parking | Audit on Busy and Quiet Day |
| The People: Stakeholder Surveys | |
| KPI 9: Business Confidence Surveys | Postal Survey |
| KPI 10: Town Centre Users Surveys | Face to Face Surveys/ Online Survey |
| KPI 11: Shoppers Origin Surveys | Shoppers Origin Survey |
| KPI: 12 Digital Development | Survey |
| Added Social and Economic Value (not included for this survey) | |
| Cultural and Community Function | |
| KPI A: Cultural Facilities | Online and Local Research |
| KPIB: Community Services | Online and Local Research |
| KPI C: Cultural and Community Events | Online and Local Research |
| Built Environment | |
| KPI D: Impressions Score | Visual Survey |
| KPI E: Number of Listed Buildings | Online Research |
| KPI F: Development Land | Online Research |
| Economic Diversity | |
| KPI G: Evening Economy | Visual Survey |
| KPI H: Local Food and Drink | Visual Survey |
| KPI I: Accommodation | Online Research |
| KPI J: Self-reliance | Online Research |
| Local Leadership and Delivery | |
| KPI K: Partnership Progression | Telephone Interview |
| KPI L: Planning and Delivery | Telephone Interview |

# Key Findings: The Place

## KPI 1: Commercial Units; Use Class

It is important to understand the scale and variety of the "commercial offer" throughout the town. A variety of shops and a wide range of services are important to its ability to remain competitive and continue to attract customers. Sustaining a balance between the different aspects of buying and selling goods and services ensures that the local population (and visitors from outside) can spend time and money there. Importantly, it forms the employment base for a substantial proportion of the community too and helps retain the population rather than lose it to nearby towns. The table below provides a detailed breakdown of each of the Use Classes.

| Class | Type of Use | Class Includes |
|---|---|---|
| A1 | Shops | Shops, retail warehouses, hairdressers, travel and ticket agencies, post offices (but not sorting offices), pet shops, sandwich bars, showrooms, domestic hire shops, dry cleaners, funeral directors and internet cafes |
| A2 | Financial and Professional Services | Financial services such as banks and building societies, professional services (other than health and medical services) including estate and employment agencies and betting offices |
| A3 | Restaurants and Cafes | Food and drink for consumption on the premises- restaurants, snack bars and cafes |
| A4 | Drinking Establishments | Public houses, wine bars or other drinking establishments (but not nightclubs) |
| A5 | Hot Food Takeaways | Sale of hot food for consumption off the premises |
| B1 | Businesses | Offices (other than those that fall within A2) research and development of products and processes, light industry appropriate in a residential area |
| B2 | General Industrial | General Industrial |
| B8 | Storage and Distribution | Warehouses, includes open air storage |
| C1 | Hotels | Hotels, boarding and guest houses where no significant element of care is provided (excludes hostels) |
| C2 | Residential Institutions | Residential care homes, hospitals, nursing homes, boarding schools, residential colleges and training centres. |
| C2A | Secure Residential Institution | Use for a provision of secure residential accommodation, including use as a prison, young offenders institution, detention centre, secure training centre, custody centre, secure hospital, secure local authority accommodation or use as a military barracks. |
| D1 | Non-Residential Institutions | Clinics, health centres, crèches, day centres, schools, art galleries (other than for sale or hire), museums, libraries, halls, places of worship, law court, non-residential education and training centres. |

| | | |
|---|---|---|
| D2 | Assembly and Leisure | Cinemas, music and concert halls, bingo and dance halls (not nightclubs), swimming baths, skating rinks, gymnasiums or areas for indoor /outdoor sports/ recreation (except motor sports/ firearms). |
| SG | Sui Generis ("unique" establishments) | Theatres, hostels providing no significant element of care, scrap yards. Petrol filling stations and shops selling and/ or displaying motor vehicles. Retail warehouse clubs, nightclubs, launderettes, taxi business, amusement centres, casinos, haulage yards, transport depots, veterinary clinics, dog parlours, tanning and beauty salons and tattoo studios. |

## Findings

The survey for Lowestoft was undertaken across three distinct areas:

- The Old High Street (part of the Lowestoft Heritage Action Zone)
- Lowestoft Town Centre
- Kirkley

The table below provides a detailed analysis of commercial offering across these three areas by Use Class. The figures are presented as a percentage of the occupied units recorded for each area with the total of units shown below.

| Use Class | National Large Towns % | Town Centre % | Kirkley % | Old High St % |
|---|---|---|---|---|
| **A1 Retail** | 50% | 64% | 49% | 58% |
| **A2 Professional & financial services** | 14% | 18% | 2% | 12% |
| **A3 Cafes & restaurants** | 11% | 8% | 11% | 8% |
| **A4 Bars & pubs** | 4% | 2% | 6% | 4% |
| **A5 Take-aways** | 3% | 2% | 10% | 5% |
| **B1 Offices** | 4% | 2% | 1% | 0% |
| **B2 Light industrial** | 0 | 0% | 0% | 0% |
| **B8 Storage** | 0 | 0% | 0% | 0% |
| **C1 Hotels & accommodation** | 1% | 0% | 13% | 0% |
| **C2 Residential institutions (care)** | 0 | 0% | 0% | 3% |
| **C2a Residential institutions (secure)** | 0 | 0% | 0% | 0% |
| **D1 Non-residential institutions** | 5% | 1% | 0% | 0% |
| **D2 Assembly & leisure** | 1% | 0% | 1% | 1% |
| **Sui Generis** | 6% | 3% | 8% | 8% |
| **Total Number** | n/a | **125** | **112** | **74** |

The business data for Lowestoft in 2019 indicates that a moderately high proportion of businesses in both the town centre (64%) and Old High Street (58%) are shops compared to 50% for other benchmarked towns nationally. Of other businesses there are a significant number of professional and financial services (18%) in the town centre as well as restaurants and cafes (8%). The Old High Street has a significant proportion of financial institutions (12%), restaurants/cafes (8%) and a high level of takeaways (5%).

In understanding the current composition and future potential of Lowestoft town centre and especially the Old High Street, it is instructive to understand the complementary role of Kirkley. Neighbouring Kirkley has a more diverse business mix with just over half of businesses being retail (49%) and a good mix of cafes/restaurants (11%), pubs/bars (6%) and take-aways (10%). Consistent with its resort status, Kirkley has a high proportion (13%) of hotels and guest houses.

## KPI 2: Commercial Units; Comparison versus Convenience

A1 Retail units selling goods can be split into two different types Comparison and Convenience.

**Convenience goods** – low-cost, everyday items that consumers are unlikely to travel far to purchase. Defined as;

- food and non-alcoholic drinks
- tobacco
- alcohol
- newspapers and magazines
- non-durable household goods.

**Comparison goods** – all other retail goods.

- books
- clothing and footwear
- furniture, floor coverings and household textiles
- audio-visual equipment and other durable goods
- hardware and DIY supplies
- chemists goods
- jewelry, watches and clocks
- bicycles
- recreational and miscellaneous goods
- hairdressing

The presence of a variety of shops in a town centre is important to its ability to remain competitive and continue to attract customers. A balance of both comparison and convenience retail units is therefore ideal in terms of encouraging visitors / potential customers.

The following table provides a percentage of the A1 Shops which sell mainly comparison or convenience goods.

| | National Large Towns % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|
| **Comparison** | 84% | 93% | 91% | 81% |
| **Convenience** | 16% | 7% | 9% | 19% |
| **Total number** | **n/a** | **89** | **60** | **53** |

The table indicates that a high proportion of shops in Lowestoft town centre are comparison retailers (93%). Neighbouring Kirkley has a similar proportion of comparison retailers (91%). There is a greater proportion of convenience retailers in the Old High Street (19%) and this is comparable with large town nationally.

Whilst the percentage of comparison retailers indicates that overall Lowestoft is an established local shopping centre, it also suggests a continued vulnerability to competition from neighbouring centres and on-line. It will be important for these shops to have a distinctive offer pitched at local customers and/or potential visitors.

## KPI3: Commercial Units; Trader Types

The vitality of a town centre depends highly on the quality and variety of retailers represented. Certain national retail businesses are considered key attractors and are particularly important in terms of attracting visitors and shoppers to a town. The character and profile of a town often also depends on the variety and mix of independent shops that can give a town a "unique selling point". A sustainable balance of key attractors and multiple names alongside local independent shops is therefore likely to have the greatest positive impact on the vitality and viability of a town. The following shops are considered Key attractors by Experian Goad.

| **Department Stores** | **Supermarkets** | **Other Retailers** |
|---|---|---|
| Debenhams | Sainsbury's | Carphone Warehouse |
| House of Fraser | Tesco | Clarks |
| John Lewis | Waitrose | Clintons |
| Marks and Spencer | **Clothing** | HMV |
| **Mixed Goods Retailers** | Dorothy Perkins | O2 |
| Argos | H & M | Superdrug |
| Boots | New Look | Phones 4 U |
| TK Maxx | River Island | Vodafone |
| WH Smith | Topman | Waterstones |
| Wilkinson | Topshop | |
| Primark | Burton | |

Multiple traders have a countrywide presence and are well known household names. Regional shops are identified as those with stores / units in several towns throughout one geographical region only and Independent shops are identified as those that are specific to a particular town.

The following table provides a percentage of the A1 Shops which are Key Attractors, Multiples, Regional and Independent to the locality.

| | National Large Towns % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|
| **Key attractor** | 7% | 16% | 0 | 0 |
| **Multiple/ national** | 19% | 41% | 4% | 0 |
| **Regional** | 10% | 4% | 2% | 0 |
| **Independent** | 64% | 39% | 94% | 100% |

The data for Lowestoft town centre indicates that it has a high proportion of key attractors (16%) and national multiples (39%) compared to other comparable towns. Although the town centre has a low proportion of independent retailers (45%), with few regional multiples, this is offset by a high proportion of businesses that are independently-owned in the Old High Street (100%) and in neighbouring Kirkley (94%).

## KPI4: Commercial Units Vacancy Rates

Vacant units are an important indicator of the vitality and viability of a town centre. The presence of vacant units over a period of time can identify potential weaknesses in a town centre, whether due to locational criteria, high rent levels or strong competition from other centres. The following table provides the percentage figure of vacant units from the total number of commercial units.

| | National Large Towns % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|
| **Vacancy** % | 11% | 17% | 14% | 22% |

The vacancy data for Lowestoft indicates a high level across the whole town. Business vacancies are highest on the Old High Street (22%) an unusually it is challenging to determine if some businesses are trading as they are not all customer facing in a traditional sense or have irregular opening hours. The town centre has a vacancy rate of 17% and appears impacted by both national chain and regional/local store closures that is higher than comparable towns. Kirkley also has a similarly high vacancy rate (17%) which is probably due to higher than normal closure and 'churn' of independent businesses.

## KPI5: Markets

Good quality markets provide competition and choice for consumers. A busy and well-used street market can therefore be a good indicator of the vitality of a town centre. Conversely, if a market is in decline (e.g. empty pitches reducing numbers), it can be an indication of potential weaknesses in the town centre e.g. a lack of footfall customers due to an inappropriate retail mix or increased competitor activity. Street markets can also generate substantial benefits for the local economy. Markets can also provide a local mechanism for a diverse range of local enterprises to start, flourish and grow, adding to the sustainable mix of shops services on offer throughout the town.

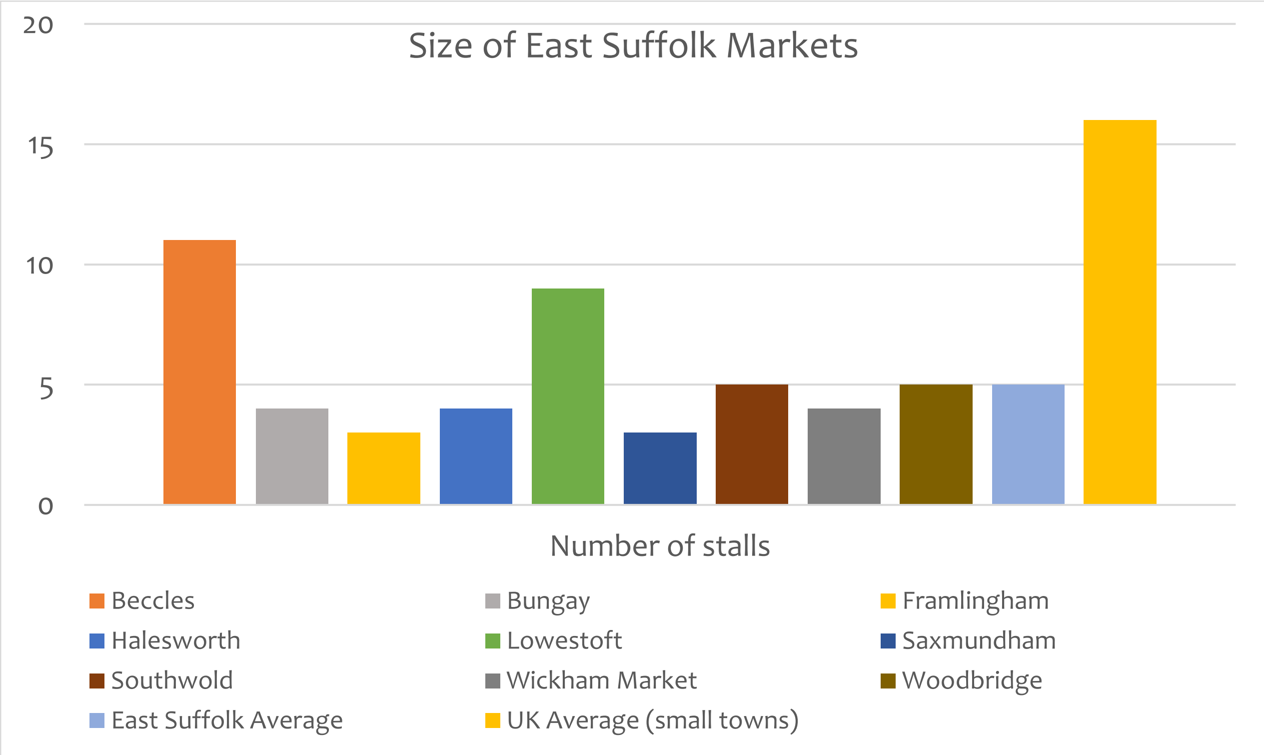
Lowestoft's market is very small despite a potentially prominent space that could draw shoppers to start of Old High Street. Going forward there is potential to look at revamping the space and offering to increase its appeal and attract footfall to the Old High Street. Alternatively, there is space to accommodate a market in the town centre if it added to the quality of the experience to increase appeal in a way that benefitted neighbouring businesses. At the time of the survey there were only four stalls on Lowestoft market though it is understood this has increased to nine following the re-launch of a Saturday market. This compares to an East Suffolk average of only five stalls and 68 nationally for large towns.

| | National Large Towns | East Suffolk average % | Lowestoft |
|---|---|---|---|
| **Average number of traders** | 68 | 5 | 4 |

## *East Suffolk-wide Comparisons (markets)*

The indicative data for East Suffolk markets shows that they are mostly very small in size and, except for Framlingham and the re-launched market in Lowestoft, are held mid-week. Only Lowestoft and Beccles markets have more than five stalls. As such the suggestion is that the markets sell goods that supplement town centre retail rather than serving as destinations in their own right.

| Town | Market Day | Number of stalls |
|---|---|---|
| Aldeburgh | No market | n/a |
| Beccles | Friday | 11 |
| Bungay | Thursday | 4 |
| Felixstowe | No market | n/a |
| Framlingham | Tuesday & Saturday | 3 |
| Halesworth | Wednesday | 4 |
| Leiston | No market | n/a |
| Lowestoft | Saturday (re-launched September 2019) | 9 |
| Saxmundham | Wednesday | 3 |
| Southwold | Monday & Thursday | 5 |
| Wickham Market | Wednesday | 4 |
| Woodbridge | Thursday | 5 |
| East Suffolk Average | n/a | 5 |
| UK Average (small towns) | n/a | 16 |




## KPI 6: Business Rates

Average Rateable Values are used here as an indicative benchmark for the overall scale/value of the premises across the town centre. Rateable Value is a proxy for the rental value of business properties and is used with a multiplier to calculate business rates, before any relief or discounts are deducted. The benchmarks used here are calculated rateable value figure for town centre shops and cafes published by the Local Government Association for 2018/19.

| | East Suffolk Large Towns Averages | Lowestoft |
|---|---|---|
| **Rateable Value** | | |
| **Average Rateable Value** | £16,583 | £15,680 |

The average Rateable Value for Lowestoft shops and cafes is £15,680 relative to £16,583 for large East Suffolk town centres. This represents a vast range of rateable values depending on the location and size of properties in the town centre from £510 to £198,000.

## KPI 7: Footfall

The arrival and movement of people, whether as residents, workers, visitors or a shopper is vital to the success of the majority of businesses within the town centre. The more people that are attracted to the town, the better it trades and the more prosperous the businesses in it become, provided there is ample available disposable income in that population. Measuring passing people in a consistent manner in the same place, at the same time builds up a picture of the town, its traders and their relative success over the weeks and months.

The following table provides the average number of people per 10 minutes between 10am and 1pm from the busiest footfall location in Lowestoft (outside Marks & Spencers). Data for a range of locations sampled is also summarised overleaf.

| | National Large Towns | Lowestoft 2019 |
|---|---|---|
| **Busy day** | 310 | 420 |
| **Quiet day** | 241 | 317 |

This indicative data shows that Lowestoft town centre is busier compared to similarly-sized benchmarked towns nationally with 420 passers-by per 10 minutes on a busy day and 317 on a non-market day. This compares to 310 and 241 respectively for small towns nationally on a busy/market day and quiet/non-market day. Data collection included a Saturday as a busy in Lowestoft whereas the norm is to use a mid-week market day as the indicative 'busy' day; this may have boosted the figure.

As with many towns, analysis of the data for other locations indicates that footfall in Lowestoft varies significantly between the different locations. This is especially marked looking across the three areas of Lowestoft. As the table below indicates, the town centre receives approximately ten times the footfall of the adjacent Old High Street and neighbouring Kirkley. This indicates that people are not migrating between these zones and that businesses in these quiet areas are not being exposed to the higher levels of footfall achieved elsewhere in Lowestoft. One of the challenges going forward is to understand how the town centre and Old High Street relate to each other in users' minds and the opportunities to encourage movement between these areas. In Kirkley the challenge is probably more to understand the potential for users to move between the sea front and London Road.

| Footfall | Market Triangle Old High Street | M&S Town Centre | J Hoots Chemist Kirkley |
|---|---|---|---|
| **Date** 22nd January 2019 (weather very cold) | | | |
| 10-11am for 10-minute slot | 37 | 274 | 25 |
| 11-12am for 10-minute slot | 51 | 336 | 24 |
| 12am-1pm for 10-minute slot | 66 | 342 | 37 |
| **Total** | **154** | **952** | **86** |
| **Morning average (per 10 mins)** | **51** | **317** | **29** |
| **Estimated average (per hour)** | **308** | **1904** | **86** |
| **Date** 16th February 2019 (weather cold) | | | |
| 10-11am for 10-minute slot | 94 | 348 | 44 |
| 11-12am for 10-minute slot | 94 | 464 | 44 |
| 12am-1pm for 10-minute slot | 57 | 447 | 47 |
| **Total** | **245** | **1259** | **135** |
| **Morning average (per 10 mins)** | **82** | **420** | **45** |
| **Estimated average (per hour)** | **245** | **2518** | **270** |

## KPI 8: Car Parking

Usually, a large proportion of spending customers in a town centre come by car. In the rural setting, the car tends to be an essential tool, used by both those who come to spend and those who come to work. The provision of adequate and convenient car parking facilities is therefore a key element of town centre vitality. An acceptable number of available spaces with a regular, quick turn-over for shoppers are the ideal while adequate longer stay, less convenient spaces for local owners/ workers and visitors must be considered too.

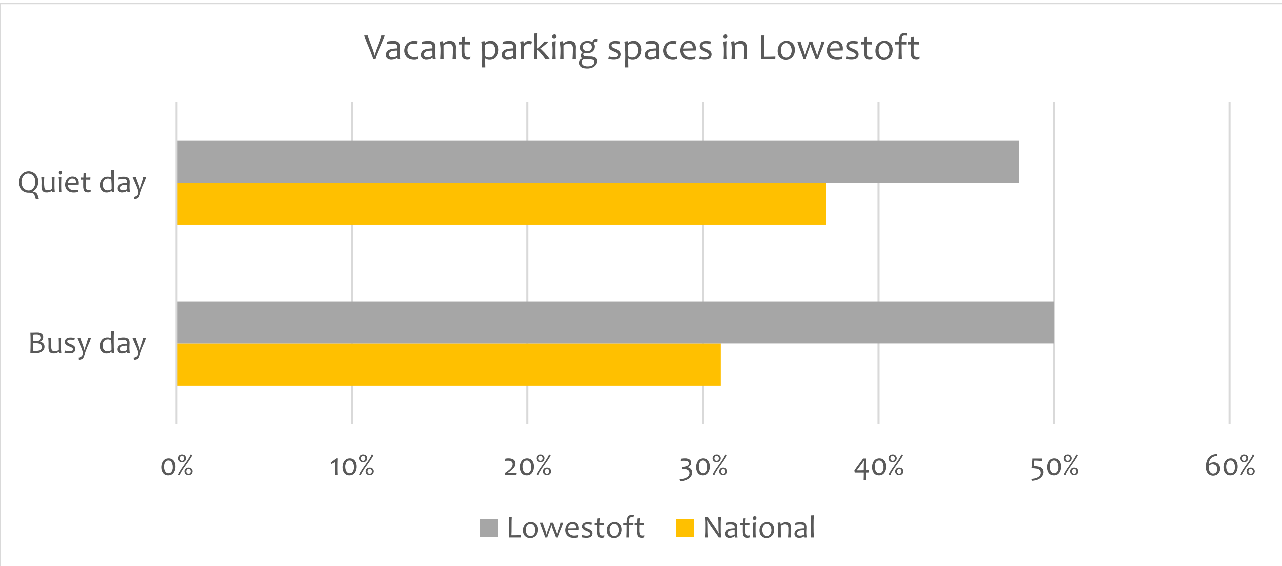
The table overleaf provide a summary of the car parking offer in the town. The data is broken down into the following categories:

- Percentage and number of spaces in designated car parks and on-street
- Percentage and number of short-stay, long-stay and disabled spaces
- Percentage of vacant spaces in designated car parks on a market/ busy day and on a non-market/ quiet day

The survey was undertaken in Lowestoft on Tuesday, January 22nd and Saturday, February 16th to provide indications of usage on quiet and busy days.

The data indicates that Lowestoft is a relatively easy place to find a parking space in on a quiet day during the week and at the weekend. There are 50% of spaces available on a busy day and 48% on a normal day. These figures are significantly less busy than the average parking vacancy rates of 31% for large towns nationally on busy days and 37% on quiet days. The distribution of spaces between car parks and on-street is typical of larger towns with the majority (93%) being in car parks. Lowestoft has a much higher proportion of long-stay parking than in other similarly sized towns though this is in part due to how the tariffs offer both options. Taken collectively, this indicative data suggests availability of parking is not a limiting factor for the town centre or other areas of Lowestoft.

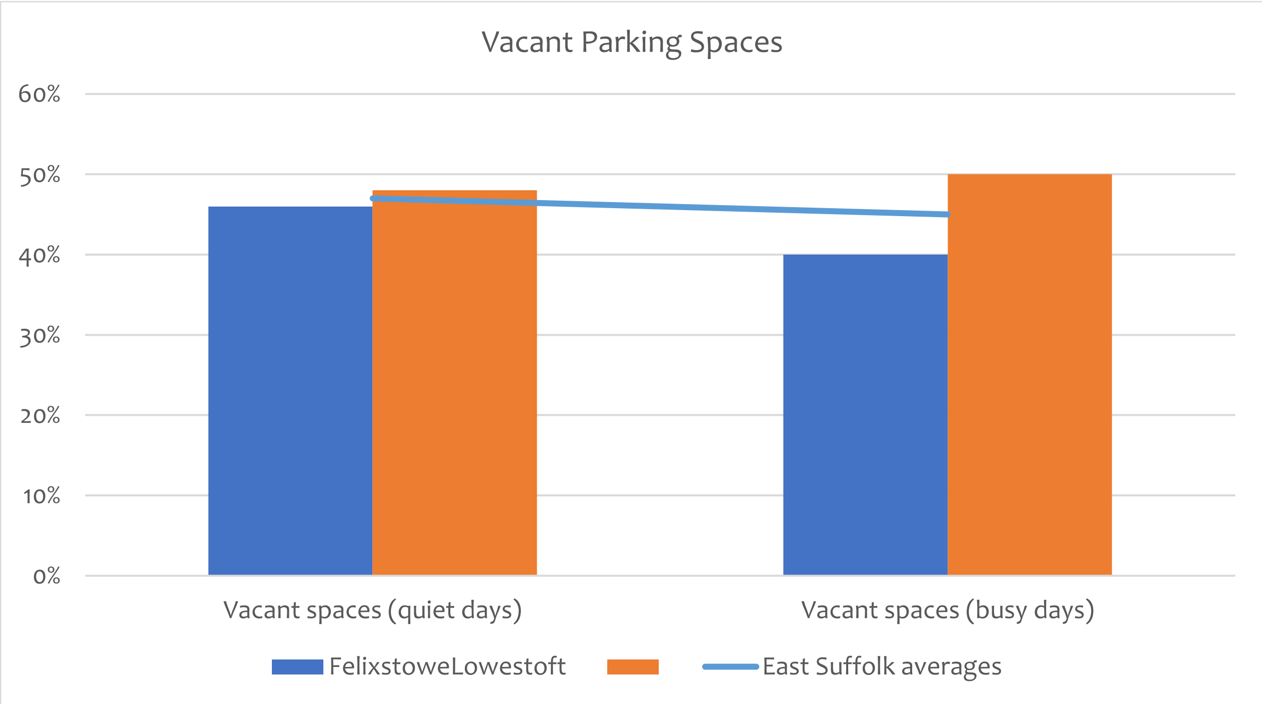
More detailed analysis would be required to examine how the distribution around the town matches different users' needs; for example, there is an indication that there is slightly more pressure on long-term parking suitable for local workers.



| Parking | National Large Towns average % | Lowestoft (number) | Lowestoft % |
|---|---|---|---|
| Car parks | | | |
| Total spaces: | 93% | 1263 | 93% |
| Short stay spaces (<4 hours) | 40% | 156 | 12% |
| Long stay spaces (>4 hours) | 49% | 1039 | 82% |
| Disabled spaces | 4% | 68 | 5% |
| Vacant spaces (busy day) | 34% | 669 | 53% |
| Vacant spaces (quiet day) | 38% | 634 | 50% |
| **On-street** | | | |
| Total spaces: | 7% | 88 | 7% |
| Short stay spaces (<4 hours) | 85% | 66 | 75% |
| Long stay spaces (>4 hours) | 4% | 0 | 0% |
| Disabled spaces | 11% | 22 | 25% |
| Vacant spaces (busy day) | 12% | 3 | 3% |
| Vacant spaces (quiet day) | 17% | 14 | 16% |
| **Overall** | | | |
| Total spaces: | n/a | 1351 | n/a |
| Short stay spaces (<4 hours) | 41% | 222 | 16% |
| Long stay spaces (>4 hours) | 52% | 1039 | 77% |
| Disabled spaces | 7% | 90 | 7% |
| Vacant spaces (busy day) | 31% | 672 | 50% |
| Vacant spaces (quiet day) | 37% | 648 | 48% |

## *East Suffolk Large Towns Comparisons (parking)*

The sample parking data for Felixstowe and Lowestoft in the winter indicates that overall they are easy places to find a vacant parking space. The indication is that at this time of year parking availability is not a limiting factor on town centre performance. Additional and more detailed survey work is needed to understand different seasonal availability and to understand customers' negative perceptions of parking in the two towns.



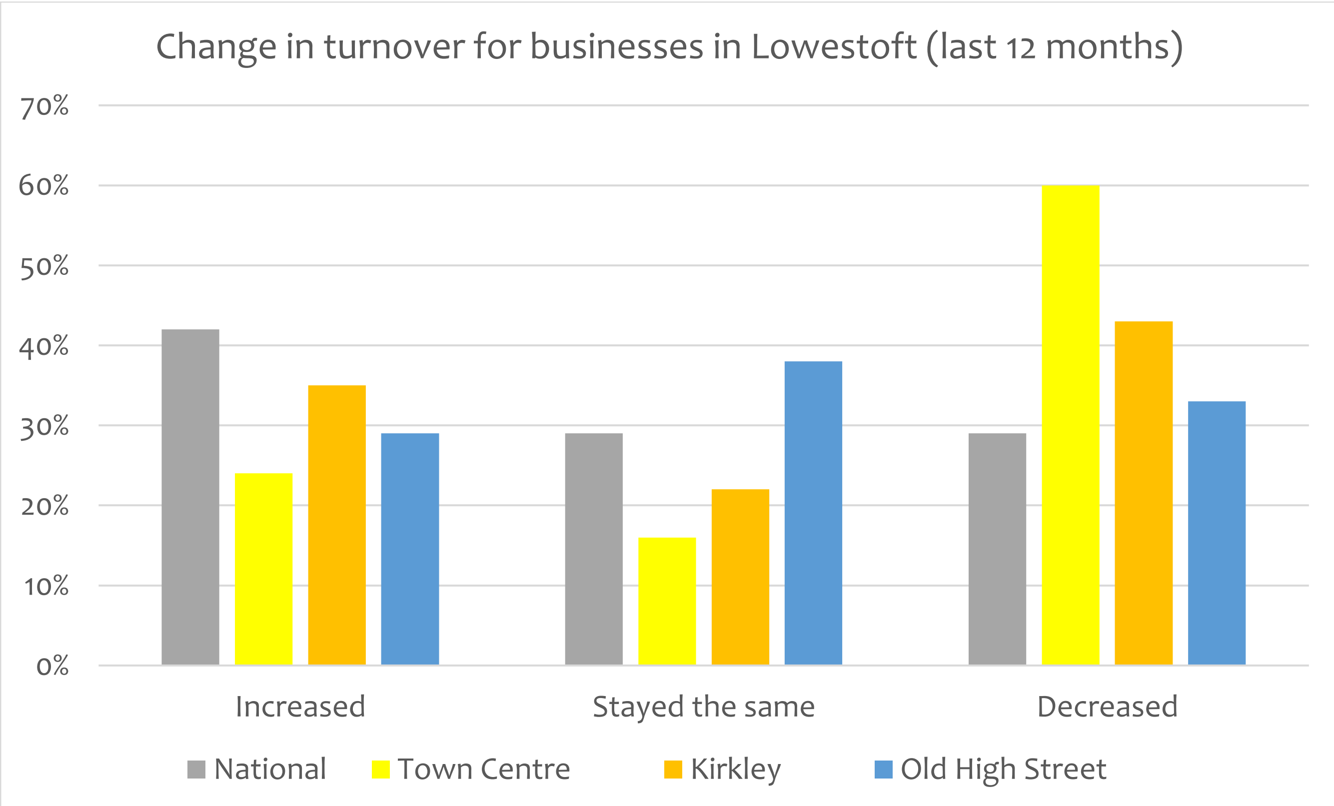
# Key Findings: *The People*

## KPI 9: Business Confidence Survey

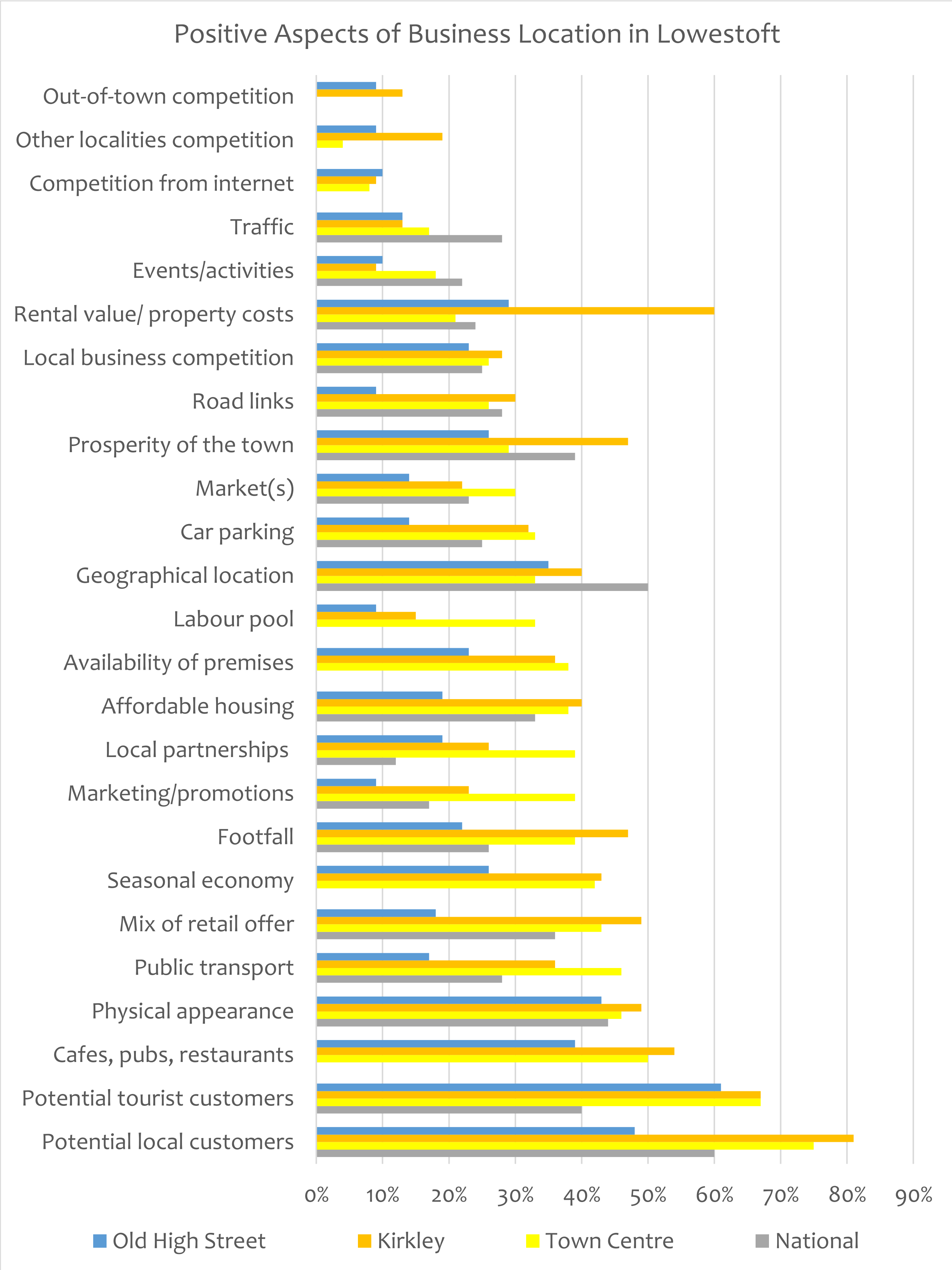
Survey forms were distributed to all the town centre businesses in Lowestoft, including Kirkley and the Old High Street (Heritage Action Zone). The following percentage figures are based on the 99 returned Business Confidence Surveys from a total of town centre 311 businesses. This is a moderate return rate of just under a third compared to 25% nationally and suggests a moderate level of interest within the town's business community. Part of the challenge in achieving a higher return rate was that businesses in the High Street in particular, did not all have regular opening hours. It is also indicative of a high percentage of multiple where managers are sometimes less able to respond to local surveyors.

| Business background | National Large Towns % | East Suffolk average % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|
| **Nature of business** | | | | | |
| Retail | 57% | 64% | 60% | 60% | 61% |
| Financial/ professional | 16% | 8% | 11% | 2% | 4% |
| Food & drink | 13% | 7% | 7% | 10% | 13% |
| Accommodation | 1% | 5% | 0% | 0% | 4% |
| Public sector | 1% | 2% | 4% | 2% | 0% |
| Other | 15% | 15% | 19% | 25% | 17% |
| **What type of business are you?** | | | | | |
| National/multiple | 11% | 15% | 25% | 4% | 0% |
| Regional | 11% | 11% | 11% | 8% | 4% |
| Independent | 78% | 33% | 64% | 88% | 96% |
| **How long has your business been in the town?** | | | | | |
| Less than a year | 5% | 7% | 4% | 8% | 9% |
| One to five years | 24% | 15% | 7% | 29% | 26% |
| Six to ten years | 11% | 10% | 7% | 19% | 13% |
| More than ten years | 60% | 69% | 82% | 44% | 52% |

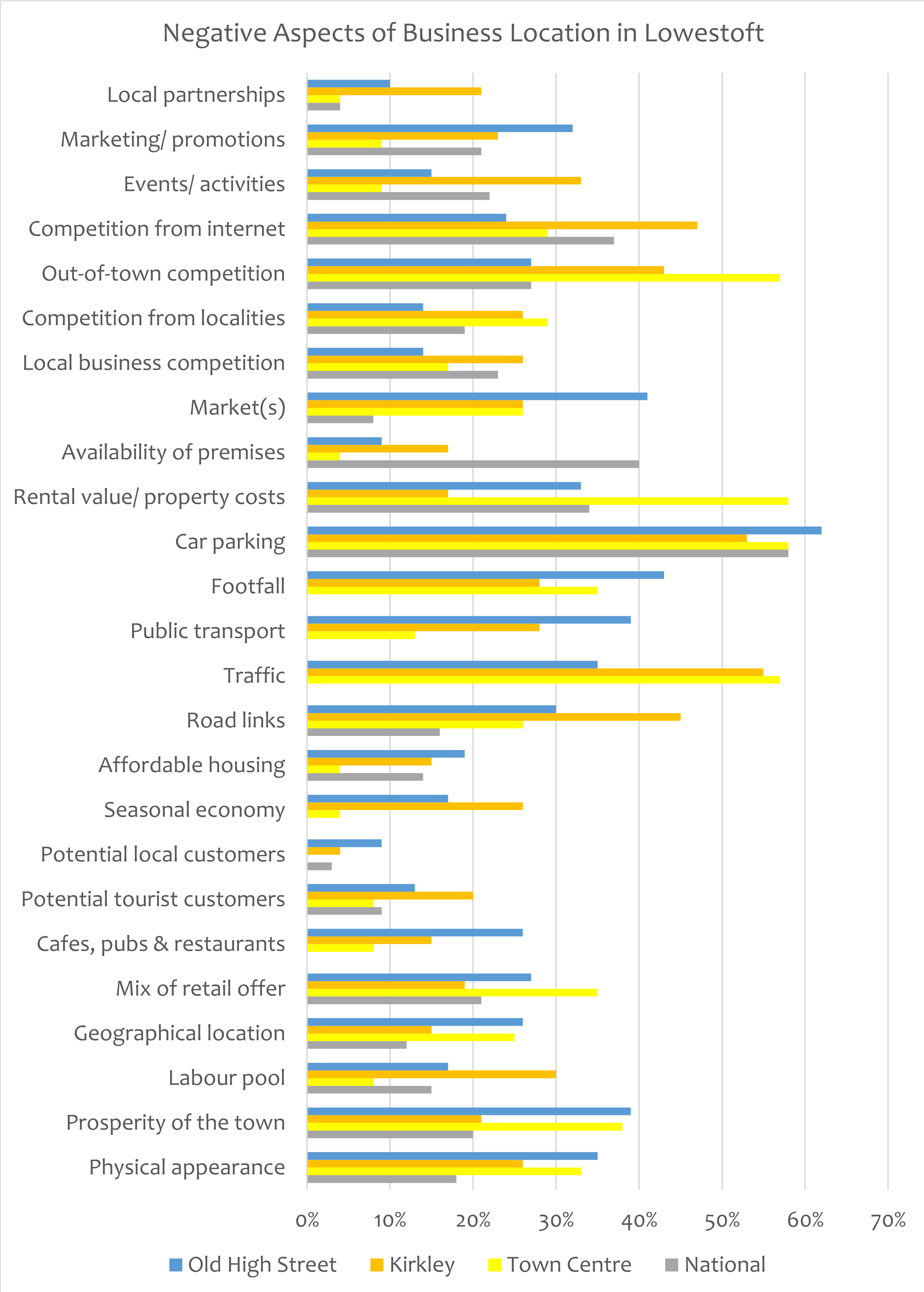
| Business confidence | National Large Towns % | East Suffolk average % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|
| **Compared to last year has your turnover** | | | | | |
| Increased | 42% | 29% | 24% | 35% | 29% |
| Stayed the same | 29% | 29% | 16% | 22% | 38% |
| Decreased | 29% | 43% | 60% | 43% | 33% |
| **Compared to last year has your profitability** | | | | | |
| Increased | 42% | 29% | 16% | 32% | 24% |
| Stayed the same | 29% | 29% | 24% | 32% | 38% |
| Decreased | 29% | 43% | 60% | 37% | 38% |
| **Over the next 12 months do you think your turnover will…** | | | | | |
| Increase | 43% | 32% | 20% | 41% | 30% |
| Stay the same | 38% | 36% | 36% | 37% | 35% |
| Decrease | 20% | 32% | 44% | 22% | 35% |



| What are the positive aspects of the town centre? | National Large Towns % | East Suffolk average % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|
| Physical appearance | 44% | 53% | 46% | 49% | 43% |
| Prosperity of the town | 42% | 43% | 29% | 47% | 26% |
| Labour pool | 11% | 24% | 33% | 15% | 9% |
| Geographical location | 50% | 41% | 33% | 40% | 35% |
| Mix of retail offer | 36% | 42% | 43% | 49% | 18% |
| Cafes, pubs, restaurants | - | 52% | 50% | 54% | 39% |
| Potential tourist customers | 40% | 67% | 67% | 67% | 61% |
| Potential local customers | 60% | 72% | 75% | 81% | 48% |
| Seasonal economy | - | 40% | 42% | 43% | 26% |
| Affordable housing | 33% | 34% | 38% | 40% | 19% |
| Road links | | 29% | 26% | 30% | 9% |
| Traffic | 28% | 22% | 17% | 13% | 13% |
| Public transport | | 40% | 46% | 36% | 17% |
| Footfall | - | 43% | 39% | 47% | 22% |
| Car parking | 25% | 35% | 33% | 32% | 14% |
| Rental value/ property costs | 24% | 36% | 21% | 60% | 29% |
| Availability of premises | - | 34% | 38% | 36% | 23% |
| Market(s) | 23% | 24% | 30% | 22% | 14% |
| Local business competition | - | 29% | 26% | 28% | 23% |
| Other localities competition | - | 14% | 4% | 19% | 9% |
| Out-of-town competition | - | 12% | 0% | 13% | 9% |
| Competition from internet | 19% | 13% | 8% | 9% | 10% |
| Events/activities | 20% | 20% | 18% | 9% | 10% |
| Marketing/promotions | 17% | 30% | 39% | 23% | 9% |
| Local partnerships | 12% | 30% | 39% | 26% | 19% |

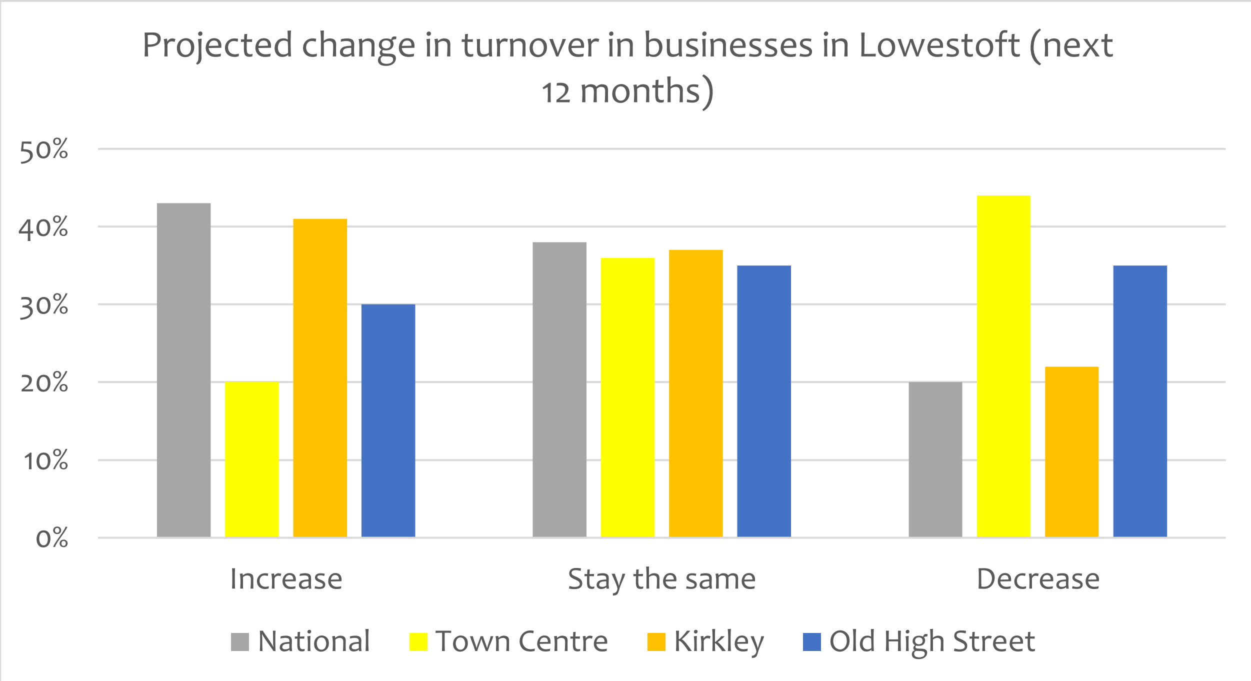

Positive Aspects of Business Location in Lowestoft
Out-of-town competition
Other localities competition
Competition from internet
Traffic
Events/activities
Rental value/ property costs
Local business competition
Road links
Prosperity of the town
Market(s)
Car parking
Geographical location
Labour pool
Availability of premises
Affordable housing
Local partnerships
Marketing/promotions
Footfall
Seasonal economy
Mix of retail offer
Public transport
Physical appearance
Cafes, pubs, restaurants
Potential tourist customers
Potential local customers
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
Old High Street
Kirkley
Town Centre
National

| What are the negative aspects of the town centre? | National Large Towns % | East Suffolk average % | Town Centre % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|
| Physical appearance | 18% | 25% | 33% | 26% | 35% |
| Prosperity of the town | 20% | 26% | 38% | 21% | 39% |
| Labour pool | 15% | 18% | 8% | 30% | 17% |
| Geographical location | 12% | 19% | 25% | 15% | 26% |
| Mix of retail offer | 21% | 24% | 35% | 19% | 27% |
| Cafes, pubs & restaurants | - | 14% | 8% | 15% | 26% |
| Potential tourist customers | 9% | 11% | 8% | 20% | 13% |
| Potential local customers | 3% | 4% | 0% | 4% | 9% |
| Seasonal economy | - | 15% | 4% | 26% | 17% |
| Affordable housing | 14% | 14% | 4% | 15% | 19% |
| Road links |  | 29% | 26% | 45% | 30% |
| Traffic | 16% | 42% | 57% | 55% | 35% |
| Public transport |  | 23% | 13% | 28% | 39% |
| Footfall | - | 30% | 35% | 28% | 43% |
| Car parking | 58% | 49% | 58% | 53% | 62% |
| Rental value/ property costs | 34% | 36% | 58% | 17% | 33% |
| Availability of premises | 40% | 12% | 4% | 17% | 9% |
| Market(s) | 8% | 30% | 26% | 26% | 41% |
| Local business competition | 23% | 20% | 17% | 26% | 14% |
| Competition from localities | 19% | 26% | 29% | 26% | 14% |
| Out-of-town competition | 27% | 43% | 57% | 43% | 27% |
| Competition from internet | 37% | 35% | 29% | 47% | 24% |
| Events/ activities | 22% | 19% | 9% | 33% | 15% |
| Marketing/ promotions | 21% | 20% | 9% | 23% | 32% |
| Local partnerships | 4% | 14% | 4% | 21% | 10% |



Negative Aspects of Business Location in Lowestoft
Local partnerships
Marketing/ promotions
Events/ activities
Competition from internet
Out-of-town competition
Competition from localities
Local business competition
Market(s)
Availability of premises
Rental value/ property costs
Car parking
Footfall
Public transport
Traffic
Road links
Affordable housing
Seasonal economy
Potential local customers
Potential tourist customers
Cafes, pubs & restaurants
Mix of retail offer
Geographical location
Labour pool
Prosperity of the town
Physical appearance
0%
10%
20%
30%
40%
50%
60%
70%
Old High Street
Kirkley
Town Centre
National

**Analysis**




Of the businesses that responded to the survey, Lowestoft town centre (60%), Kirkley (60%) and Old High Street (61%) were shops, which is higher than the large town national average of 56%. On average, 72% of these businesses are long-established in Lowestoft, having been based there for more than six years, with Lowestoft town centre having the highest number of such long-established businesses (82%); significantly higher than the national average (60%). The businesses responding in the Old High Street (35%) and Kirkley (37%) had much higher proportions of businesses that had been trading for five years or less.

In terms of recent business performance, it is discouraging that Lowestoft town centre turnover has decreased significantly (60%) over the last year compared to the national average (29%). Kirkley (43%) and Old High Street (33%) showed slightly less but still significant levels of decline. Similarly, the proportion of Lowestoft businesses with reduced profitability in the last 12 months was also 60% compared to 29% in other large towns nationally.

Looking to the future, it remains a concern that a significant proportion (44%) of town centre businesses in Lowestoft surveyed expect turnover to continue to decrease in the year ahead. Businesses in the Old High Street are also pessimistic about the year ahead with 35% projecting a continued decline in turnover. Such seemingly year-on-year declines in performance suggest that this proportion of businesses may be particularly vulnerable to competition from elsewhere. This compares to 32% for towns nationally.

In contrast to other areas of Lowestoft, businesses in Kirkley are more positive about future trading prospects with 78% expected turnover to stay the same or increase and this is comparable to expectations nationally.

Businesses in Lowestoft town centre are most appreciative of the prospects for increased numbers of local (75%) and tourist (67%) customers. This is similar for Kirkley (81% & 67%) and to a lesser extent for the Old High Street (61% and 48%). Cafes, pubs & restaurants are considered as complementary strengths in the town centre (50%) and Kirkley (54%).

Other than that, the aspects of Lowestoft town centre considered as positive by more than four-out-of-ten businesses surveyed are physical appearance (46%), public transport (46%), mix of retail offer 43% and seasonal economy (42%). Physical appearance is also viewed relatively positively by Kirkley (49%) and Old High Street (43%) businesses in a way that is comparable with large towns nationally.

Rental values/property costs (60%), the mix of retail offer, (49%), footfall (47%), seasonal economy (43%) and affordable housing (40%) are seen as positive by 46% of the businesses in Kirkley.

In terms of negative perceptions about being located in Lowestoft town centre, the main factors across all three areas are car parking (58% town centre, 53% Kirkley and 62% Old High Street), traffic (57% town centre and 55% Kirkley), rental values (58% town centre) and out-of-town competition (town centre 57%). Nationally, car parking (48%) and competition from the internet (47%) are generally considered as comparably negative aspects of town centres.

### Business priorities for improving Lowestoft

When businesses in Lowestoft were asked what two things would improve the town centre, the top priority for 38% of the businesses related to parking, comparable in all three areas, with the highest percentage being Old High Street (41%), followed by Kirkley (38%) and the town centre (36%). Other issues mentioned were retail (15%), traffic and transport (15%), business rates, empty shops (10%) and improved marketing and events in the town (7%).

The comments on parking were varied but largely focused on increasing the provision of free parking to encourage shoppers into Lowestoft rather than shopping at out-of-town retail parks. Points raised around the need to improve parking facilities also highlighted the need to improve road and transport links through adding a third crossing in Kirkley and improving rural bus links. Addressing empty shops and lowering business rates were mentioned several times as well as increasing the number of events to help attract tourists to the town.

#### *Parking*

- Free parking (15)
- Better parking (6)
- Car parking (3)
- 1-hour free parking (2)
- Parking (3)
- Better regulation on street parking;
- Car parking needs to be addressed to encourage shoppers into town
- Change parking to be free
- Cheaper car parking
- Enforce on street parking
- Enforced 1hr parking
- Free car parking in Kirkley
- Free parking in town centre

- Free parking, small market down centre of street
- Free short term (1hr) parking
- Free, better and more car parking
- Free/cheap parking
- Improve parking
- Improve traffic/parking
- Increase free car parking close by
- Less limited parking
- Lower the cost of car parking
- Make more short stay parking available
- More car parking spaces
- Parking costs reduced or free
- Parking for customers
- Customers have to pay to park in town and don't for the retail parks
- Reduce cost of public car parks
- Reduce parking costs and change payment process that they pay on returning to car so people don't rush back as they have only put one hour on the ticket
- Somewhere for employees to park
- Two-hour free parking

### *Retail*

- Stop building out of town shopping parks (4)
- Better mix of retailers / leisure providers to attract more visitors
- Better quality shops
- Better selection of shops + businesses
- Closure of bargain point
- Decrease undesirables in town centre
- Get rid of the charity shops
- Harbourside shops fixed
- Keep shops open or new range of businesses
- More big retailers
- More independent businesses
- More restaurants
- More shops (retail)
- Put local traders on same footing as multi nationals
- Too many opening same businesses so no one does well
- Town centre is dying
- Town needs to stop opening coffee and pound shops
- Local residents supporting local businesses more

### *Traffic and Transport*

- Easier traffic movements/flow (3)

- Sort traffic (3)
- Better buses for rural areas (2)
- Third crossing (2)
- Less road works
- Make the high street more linked/fluid
- Night works for road repairs
- Pedestrian area is used by too many motorists
- Train station needs colour
- Upgrade road infrastructure to make it more accessible
- Bus route through the north high street to improve footfall
- Better road network
- Traffic is an issue - puts people off; need another crossing
- High street needs to be foot only at the traffic lights

### *Marketing & Events*

- Enhance the appeal
- Map at Claremont Pier would drive much needed seasonal visitors footfall to our shops
- Attract more tourists to the area
- Get rid of Lowestoft Vision who have failed in every aspect of their remit.
- Local council to assist running local events
- Marketing
- Promote to outside investment to create new opportunities
- More evening events so people stay around later
- More events in town centre
- Seafront events

### *Business Rates*

- Lower business rates (2)
- Lower business rates to attract more business into town
- Rates for business
- Council tax is too high
- Reduced rent/rates, encourage more independent shops
- Rent to be lowered
- Vastly reduce rents, council tax and lease costs

### *Empty Shops*

- Utilise/ Use empty premises
- Fill vacant premises to make high street more appealing
- Bring back more public buildings that have been taken out of the town centre such as the registry office and the council
- Too many dilapidated shops and buildings
- Help from local authority with dealing with empty shops

### *Environment*

- Build the bridge
- Clamp down on fly tipping;
- Clean and tidy up the town centre especially the drinkers and rough sleepers
- Improve look of the local area
- Tighter controls on people who allow their dogs to mess the pavement

### *Market*

- Bring back the markets
- Not to focus on the town stopping at the triangle market
- Put the market back in the market place

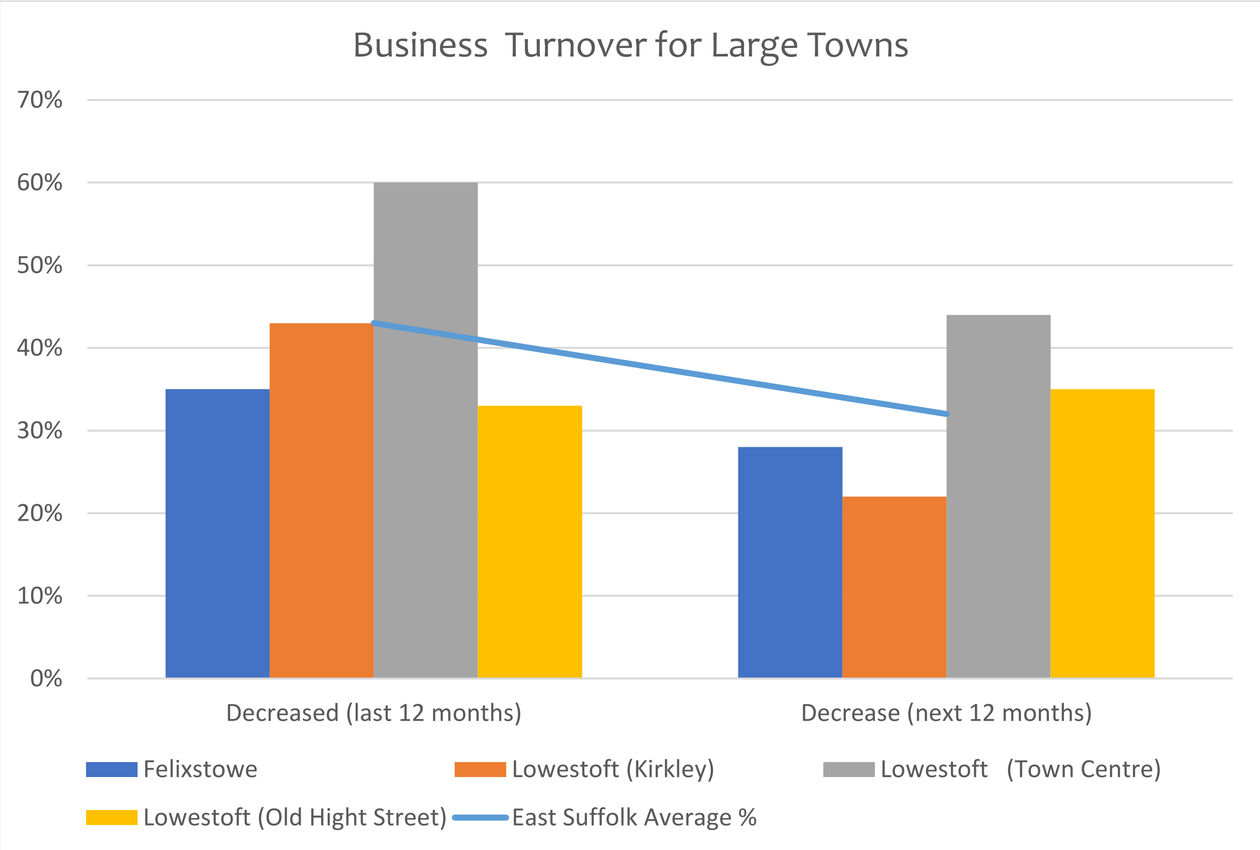
### *Other*

- Better policing in town centre
- Less kids hanging about
- Need factory/industry outside town, more employed people, more jobs
- Taxing internet sales
- Closure of hostel next to church
- More long-term employment
- For JSA to be less, to encourage more people to work and not live off the state
- Stop the government messing with people benefits so that they can get and spend their money
- Re-establish the fishing industry once out of the EU
- Big business need to recruit locally
- Disgusting that the historic high has been left to deteriorate for so long

## *East Suffolk Large Towns Comparisons (business confidence)*

Using turnover as an indicator of business confidence, it is apparent that Lowestoft town centre businesses are especially under pressure. Of the businesses that responded to the survey, a very high proportion (60%) reported a reduction in turnover over the last 12 months and 44% expect this situation to continue. The situation is better in the other adjacent areas of the Old High Street and Kirkley, where 35% and 22% respectively expect a continued decline in turnover.

Responses from Felixstowe businesses also give cause for concern where 35% report a decline in turnover in the last 12 months and 28% expect the decline to continue. To give these figures some context, however, these figures show more confidence than the responses from Aldeburgh and Southwold businesses.



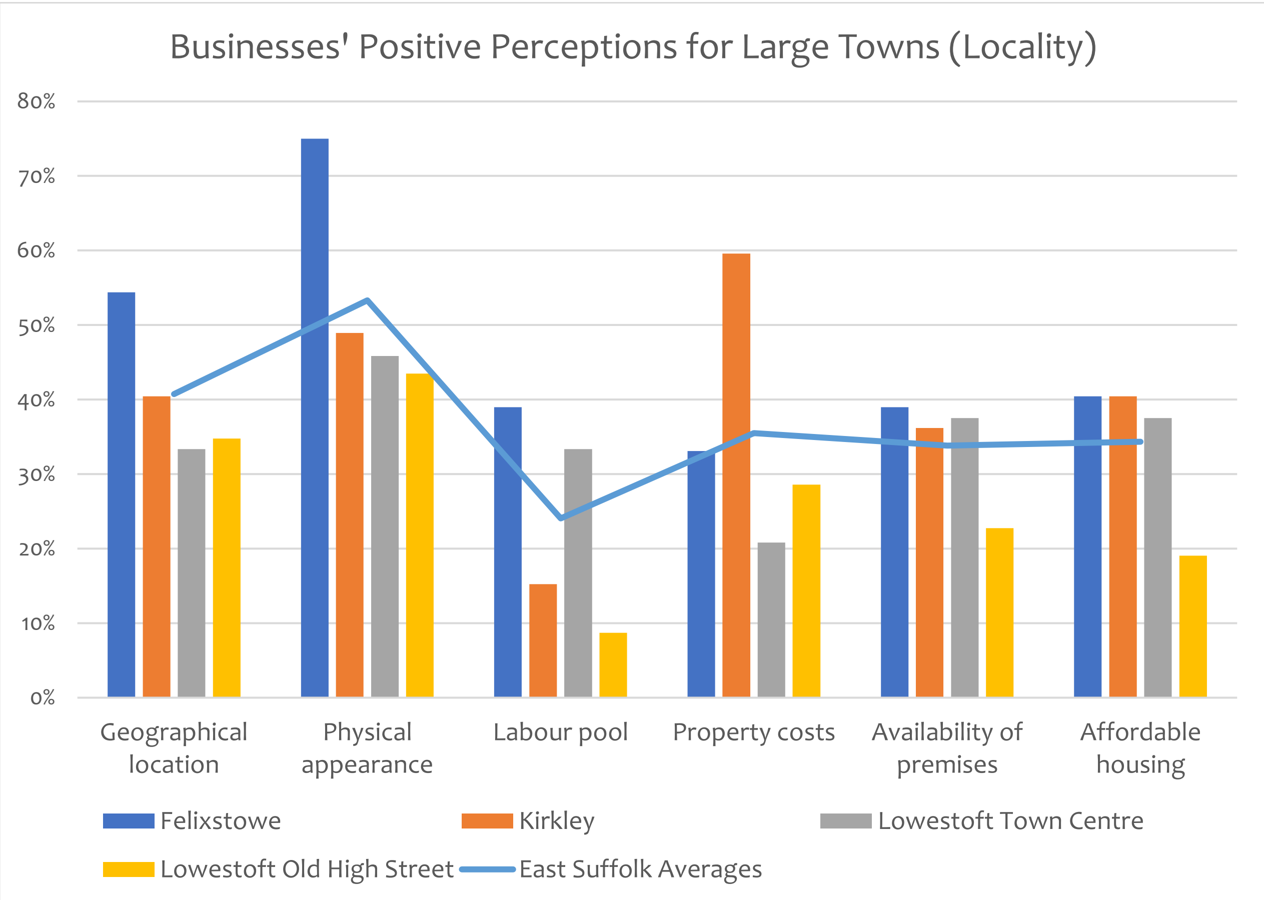
## *East Suffolk-wide Comparisons (business perceptions)*

Here the businesses' responses about their positive perceptions of the different town centres are analysed against an average response for larger, East Suffolk towns. Issues are grouped in to related sub-categories to ease interpretation.

### Locality

Business perceptions about the physical appearance of the town centres are different between the Felixstowe and Lowestoft. Satisfaction levels for Felixstowe show a positive response to recent enhancements and are comparable to levels in East Suffolk's smaller towns. There are more mixed sentiments across all three areas of Lowestoft with less than half of businesses expressing positive sentiments.

There is a more consistency in businesses' perceptions for the two large towns for other characteristics of their town centre localities. There are only moderate levels of satisfaction for property costs and the availability of premises despite higher vacancy rates; the exception is Kirkley where 60% of businesses consider low property costs to be a positive factor. In terms of sentiments about the local labour pool there are lower levels of satisfaction in the Old High Street and Kirkley compared to moderate levels of satisfaction in Lowestoft town centre and Felixstowe. There is however, not a strong sense that either Lowestoft or Felixstowe are especially affordable places to do business.

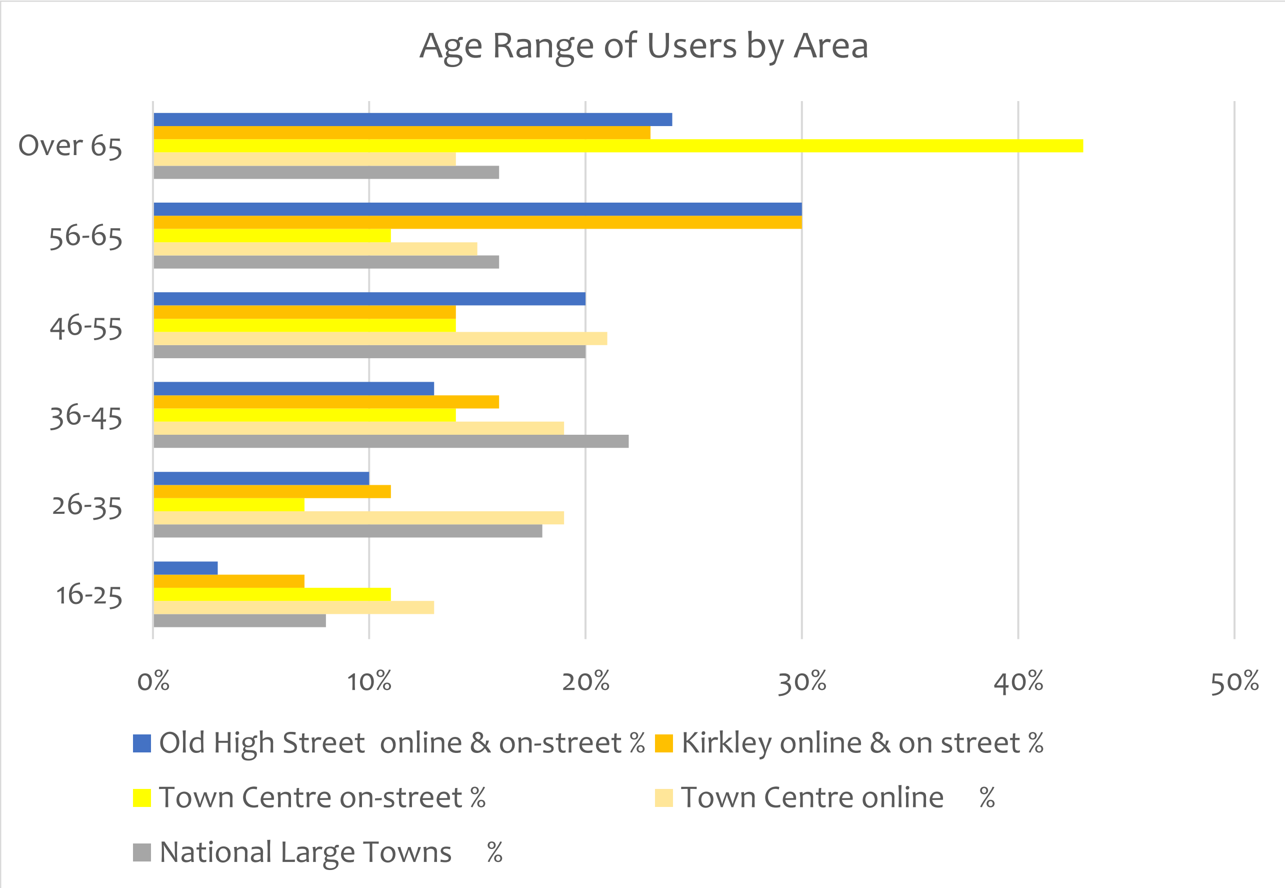


## KPI 10: Town Centre User's Survey

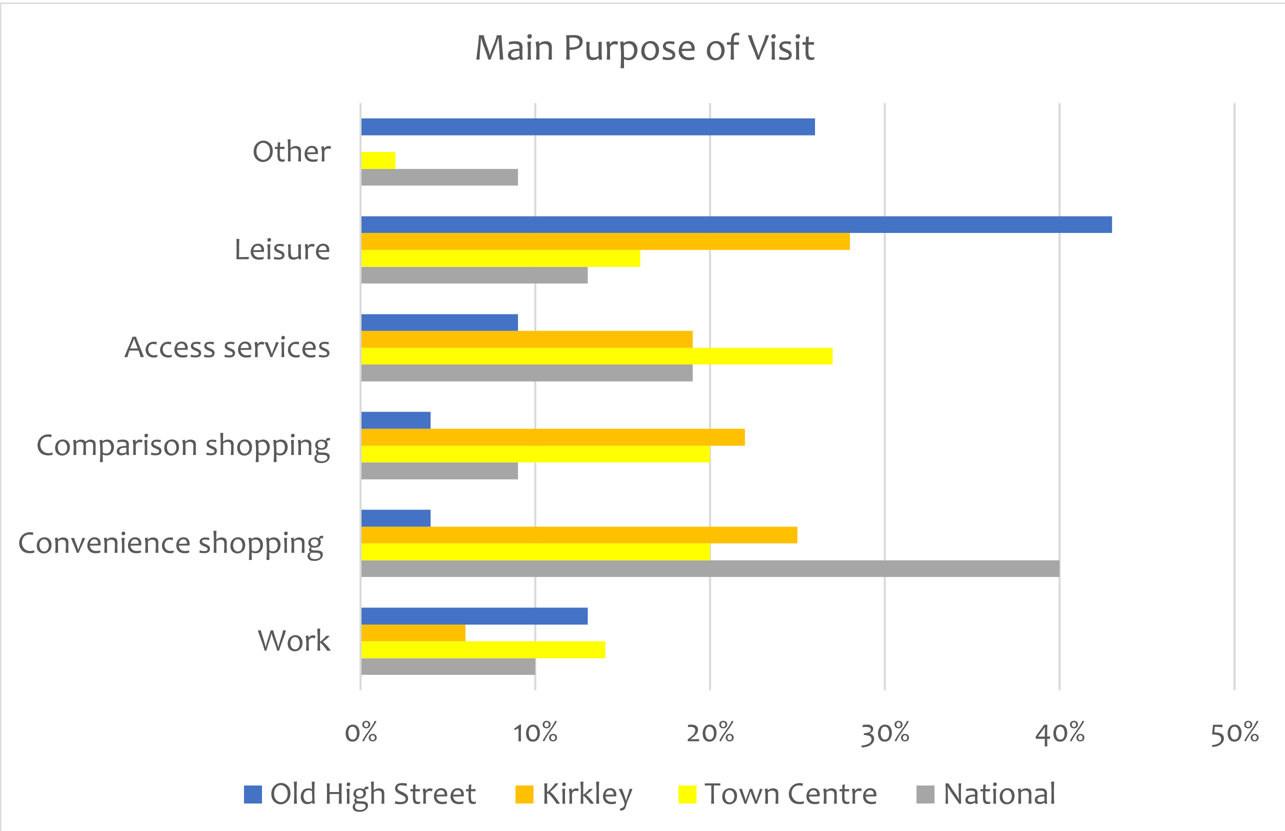
The aim of the town centre users' survey is to establish how a town is seen by those people who use it. By asking users of all types, a more detailed picture can be obtained. What matters to regular visitors can be very different to someone who has never been to the place before. For Lowestoft a large sample survey of 120 town centre users were surveyed on-street, and a further 345 customers completed an on-line survey. As a result, the totals shown below for Lowestoft are based a sample surveyed of 421 respondents. Online surveys were slightly different than the on-street surveys to pick-up infrequent users as will be highlighted in the analysis.

| | National Large Towns % | East Suffolk average % | Town Centre online % | Town Centre on-street % | Kirkley online & on street % | Old High Street online & on-street % |
|---|---|---|---|---|---|---|
| **Gender** | | | | | | |
| Male | 36% | 39% | 42% | 48% | 50% | 33% |
| Female | 64% | 61% | 58% | 52% | 50% | 66% |
| **Age** | | | | | | |
| 16-25 | 8% | 6% | 13% | 11% | 7% | 3% |
| 26-35 | 15% | 11% | 19% | 7% | 11% | 10% |
| 36-45 | 20% | 15% | 19% | 14% | 16% | 13% |
| 46-55 | 21% | 19% | 21% | 14% | 14% | 20% |
| 56-65 | 18% | 25% | 15% | 11% | 30% | 30% |
| Over 65 | 18% | 25% | 14% | 43% | 23% | 24% |
| **What is the main purpose of your visit to the town centre today?** | | | | | | |
| Work | 10% | 10% | n/a | 14% | 6% | 13% |
| Convenience shopping | 40% | 25% | n/a | 20% | 25% | 4% |
| Comparison shopping | 9% | 14% | n/a | 20% | 22% | 4% |
| Access services | 19% | 18% | n/a | 27% | 19% | 9% |
| Leisure | 13% | 27% | n/a | 16% | 28% | 43% |
| Other | 9% | 7% | n/a | 2% | 0% | 26% |
| **How often do you visit the town centre? (Please choose one option only)** | | | | | | |
| Daily | 21% | 27% | 8% | 18% | 28% | 33% |
| >once a week | 34% | 30% | 19% | 39% | 28% | 17% |
| Weekly | 20% | 17% | 18% | 14% | 15% | 13% |
| Fortnightly | 7% | 6% | 9% | 11% | 4% | 3% |
| Once a month or more | 5% | 8% | 10% | 9% | 7% | 10% |
| Once a month or less | 11% | 13% | 36% | 7% | 11% | 20% |
| First visit | 1% | 8% | 0% | 2% | 7% | 3% |

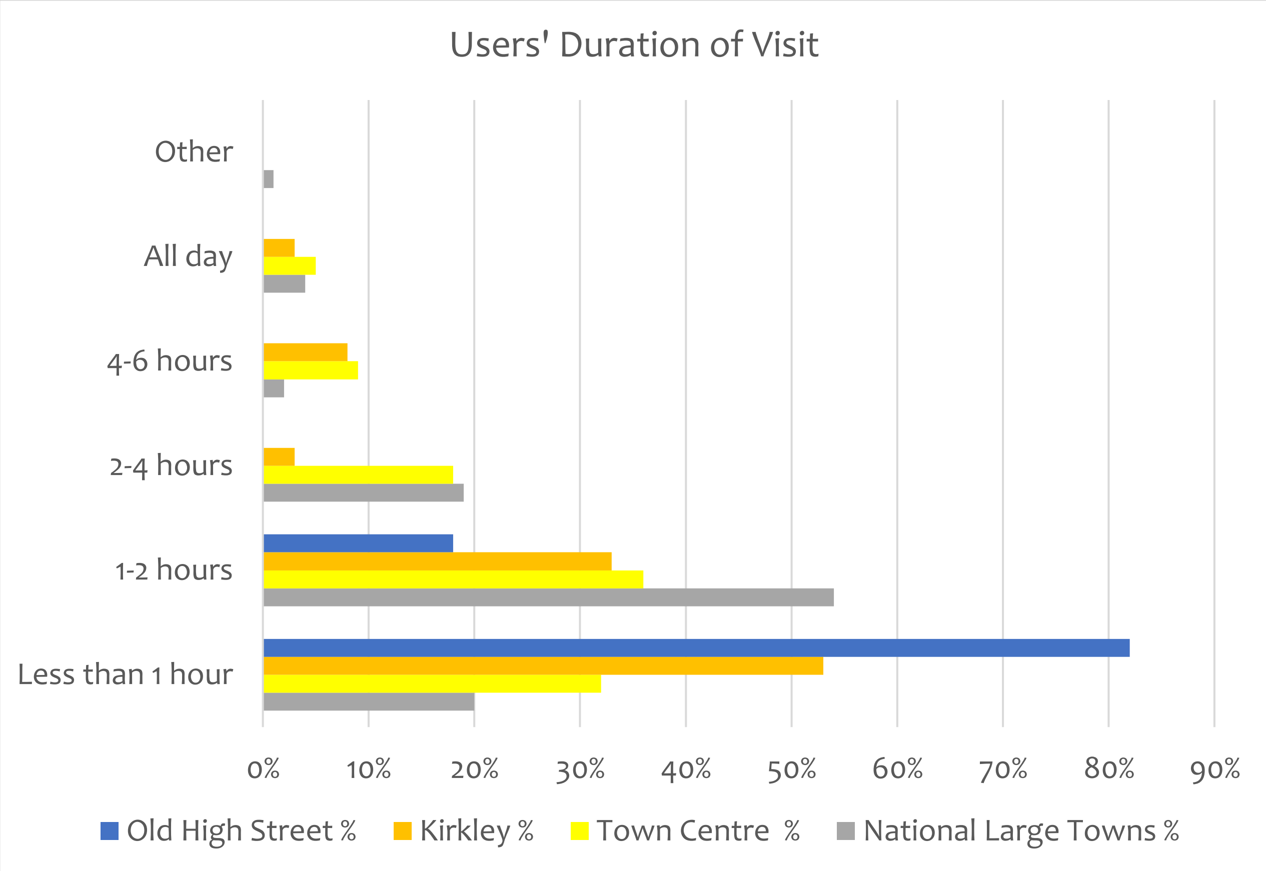
| | National Large Towns % | East Suffolk average % | Town Centre online. % | Town Centre on-street % | Kirkley online & on-street % | Old High Street online & on-street % |
|---|---|---|---|---|---|---|
| **How did you travel into the town centre today?** | | | | | | |
| On foot | 28% | 52% | n/a | 43% | 72% | 70% |
| Bicycle | 2% | 6% | n/a | 7% | 6% | 4% |
| Motorbike | 0% | 0% | n/a | 0% | 0% | 0% |
| Car | 58% | 34% | n/a | 32% | 19% | 17% |
| Bus | 9% | 8% | n/a | 16% | 3% | 9% |
| Comm. bus | 1% | 0% | n/a | 0% | 0% | 0% |
| Other | 2% | 1% | n/a | 2% | 0% | 0% |
| **How long do you intend to stay on this visit to the town centre?** | | | | | | |
| < 1 hour | 17% | 52% | n/a | 32% | 53% | 82% |
| 1-2 hours | 42% | 31% | n/a | 36% | 33% | 18% |
| 2-4 hours | 25% | 10% | n/a | 18% | 3% | 0% |
| 4-6 hours | 6% | 5% | n/a | 9% | 8% | 0% |
| All day | 9% | 3% | n/a | 5% | 3% | 0% |
| Other | 1% | 1% | n/a | 0% | 0% | 0% |
| **On average, on a normal visit to the town centre, how much money would you spend?** | | | | | | |
| Nothing | 3% | 13% | n/a | 2% | 8% | 41% |
| £0.01-£5.00 | 10% | 17% | n/a | 19% | 28% | 14% |
| £5.01-£10 | 20% | 27% | n/a | 35% | 31% | 18% |
| £10.01-£20 | 29% | 25% | n/a | 23% | 22% | 18% |
| £20.01-£50 | 28% | 16% | n/a | 16% | 11% | 5% |
| >£50.00 | 10% | 3% | n/a | 5% | 0% | 5% |
| **Would you recommend a visit to the town centre?** | | | | | | |
| Yes | 72% | 62% | 21% | 52% | 79% | 67% |
| No | 28% | 36% | 79% | 48% | 21% | 27% |

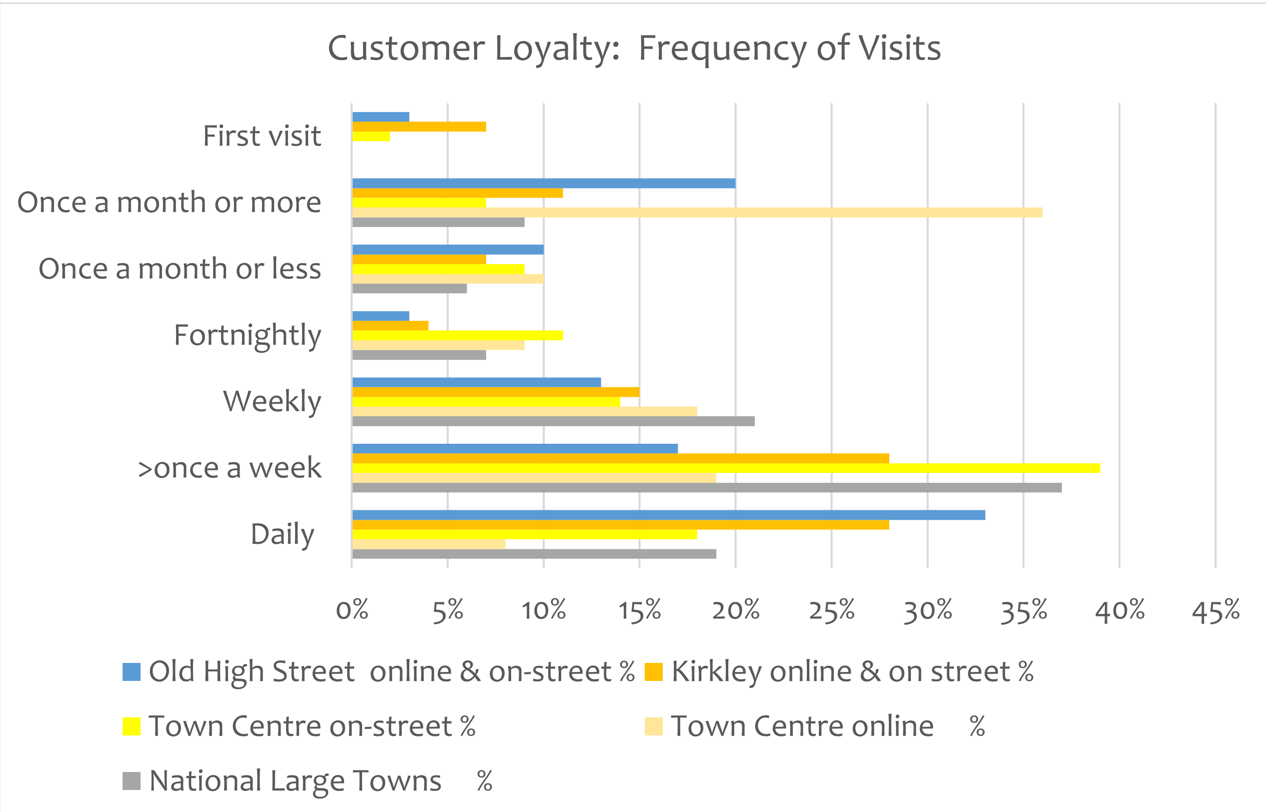


Age Range of Users by Area
Over 65
56-65
46-55
36-45
26-35
16-25
0%
10%
20%
30%
40%
50%
Old High Street online & on-street %
Kirkley online & on street %
Town Centre on-street %
Town Centre online %
National Large Towns %

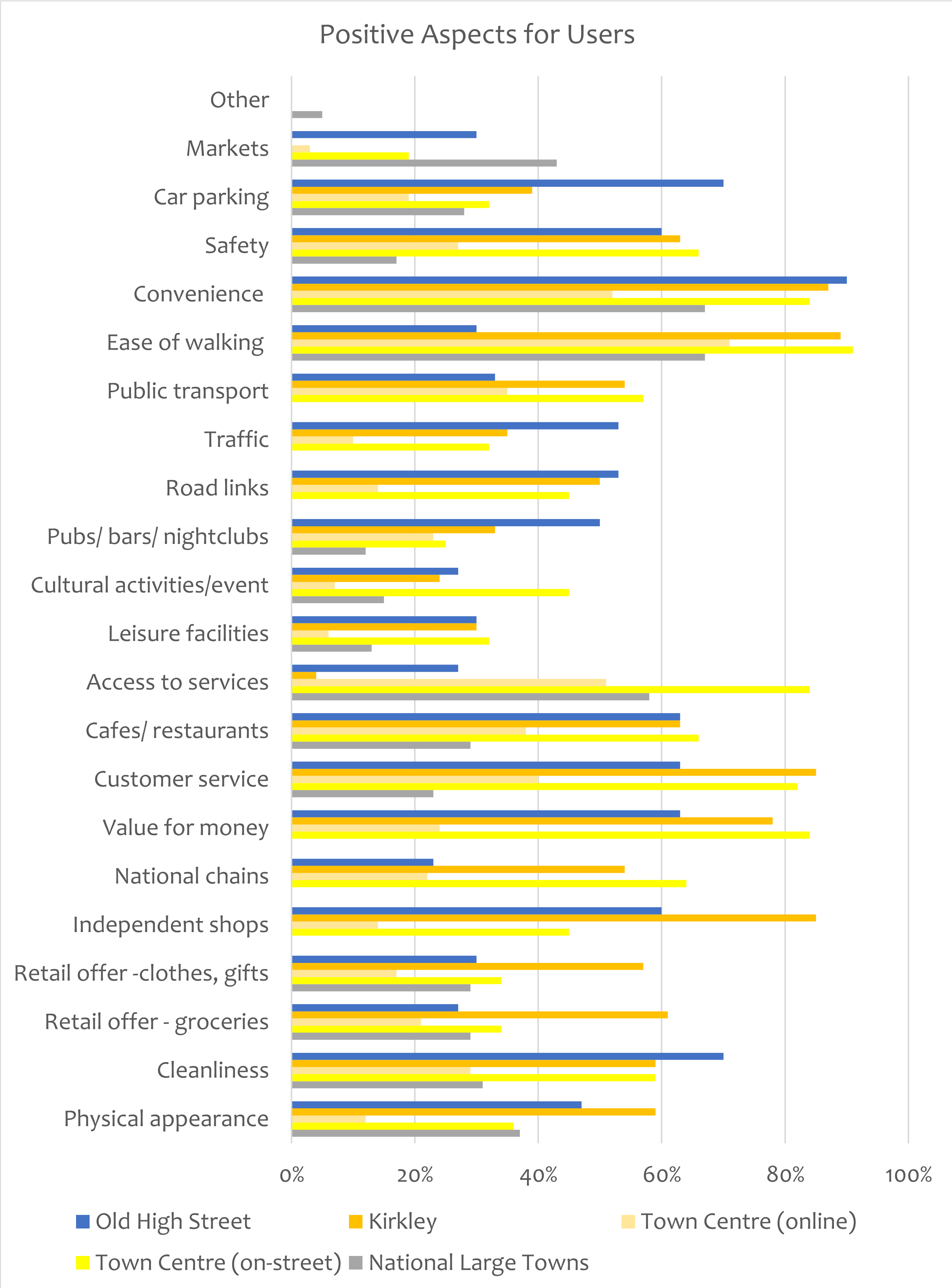



Main Purpose of Visit
Other
Leisure
Access services
Comparison shopping
Convenience shopping
Work
0%
10%
20%
30%
40%
50%
Old High Street
Kirkley
Town Centre
National

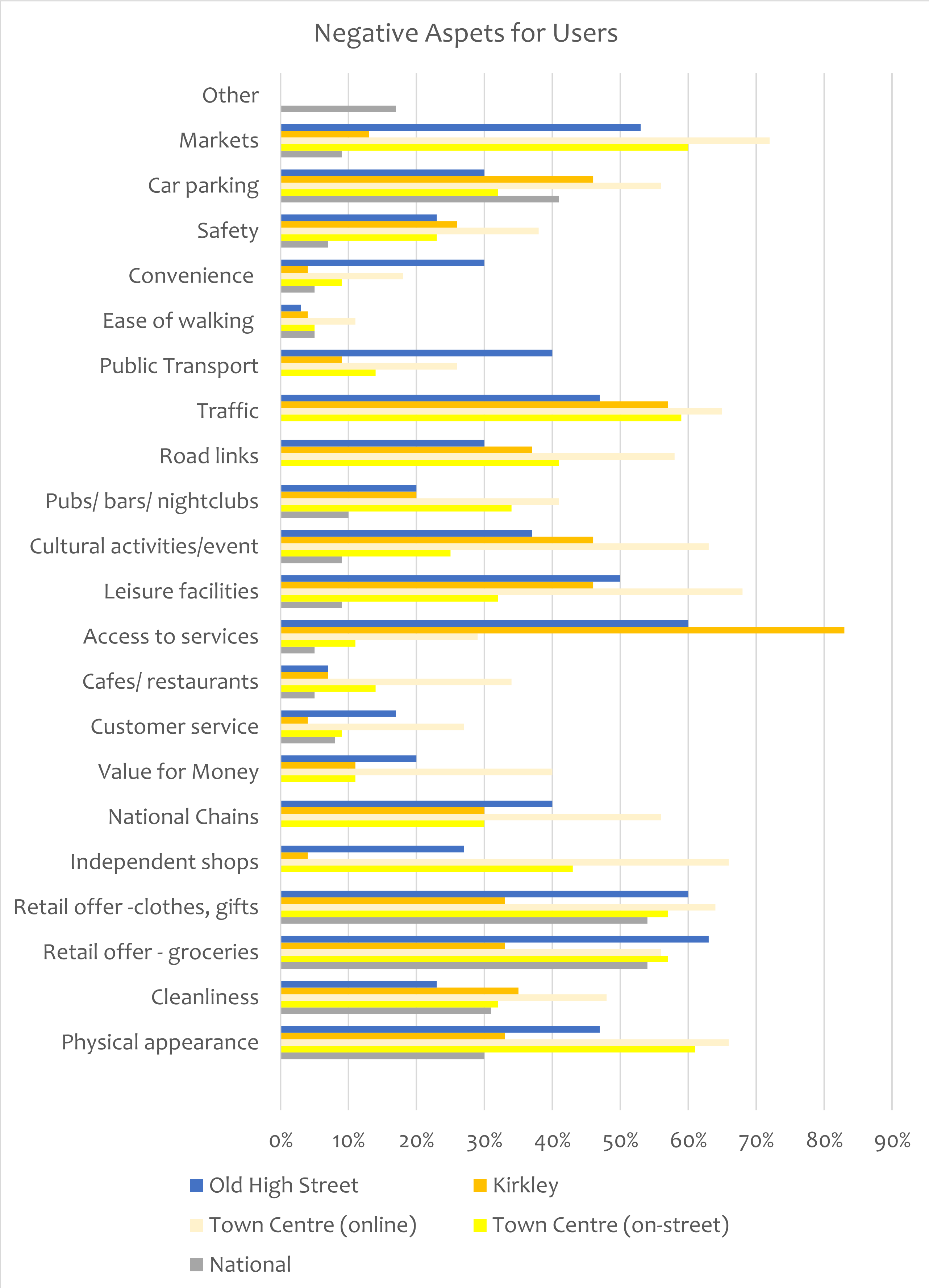

Users' Duration of Visit
Other
All day
4-6 hours
2-4 hours
1-2 hours
Less than 1 hour
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
Old High Street %
Kirkley %
Town Centre %
National Large Towns %


Customer Loyalty: Frequency of Visits
First visit
Once a month or more
Once a month or less
Fortnightly
Weekly
>once a week
Daily
0%
5%
10%
15%
20%
25%
30%
35%
40%
45%
Old High Street online & on-street %
Kirkley online & on street %
Town Centre on-street %
Town Centre online %
National Large Towns %

| Positive aspects of Town Centre | National Large Towns % | East Suffolk Average % | Town Centre on-street | Town Centre online % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|---|
| Physical appearance | 37% | 48% | 36% | 12% | 59% | 47% |
| Cleanliness | 31% | 60% | 59% | 29% | 59% | 70% |
| Retail offer - groceries | 29% | 44% | 34% | 21% | 61% | 27% |
| Retail offer - clothes, gifts | | 36% | 34% | 17% | 57% | 30% |
| Independent shops | n/a | 59% | 45% | 14% | 85% | 60% |
| National chains | n/a | 36% | 64% | 22% | 54% | 23% |
| Value for money | n/a | 61% | 84% | 24% | 78% | 63% |
| Customer service | 23% | 71% | 82% | 40% | 85% | 63% |
| Cafes/ restaurants | 29% | 63% | 66% | 38% | 63% | 63% |
| Access to services | 58% | 43% | 84% | 51% | 4% | 27% |
| Leisure facilities | 13% | 28% | 32% | 6% | 30% | 30% |
| Cultural activities/event | 15% | 27% | 45% | 7% | 24% | 27% |
| Pubs/ bars/ nightclubs | 12% | 38% | 25% | 23% | 33% | 50% |
| Road links | 21% | 47% | 45% | 14% | 50% | 53% |
| Traffic | | 39% | 32% | 10% | 35% | 53% |
| Public transport | | 44% | 57% | 35% | 54% | 33% |
| Ease of walking | 67% | 71% | 91% | 71% | 89% | 30% |
| Convenience | 67% | 83% | 84% | 52% | 87% | 90% |
| Safety | 17% | 58% | 66% | 27% | 63% | 60% |
| Car parking | 28% | 48% | 32% | 19% | 39% | 70% |
| Markets | 43% | 11% | 19% | 3% | 0% | 30% |


Positive Aspects for Users
Other
Markets
Car parking
Safety
Convenience
Ease of walking
Public transport
Traffic
Road links
Pubs/ bars/ nightclubs
Cultural activities/event
Leisure facilities
Access to services
Cafes/ restaurants
Customer service
Value for money
National chains
Independent shops
Retail offer -clothes, gifts
Retail offer - groceries
Cleanliness
Physical appearance
0%
20%
40%
60%
80%
100%
Old High Street
Kirkley
Town Centre (online)
Town Centre (on-street)
National Large Towns

| Negative aspects of Town Centre | National Large Towns % | East Suffolk Average % | Town Centre on-street % | Town Centre online % | Kirkley % | Old High Street % |
|---|---|---|---|---|---|---|
| Physical appearance | 30% | 43% | 61% | 66% | 33% | 47% |
| Cleanliness | 31% | 30% | 32% | 48% | 35% | 23% |
| Retail offer - groceries | 54% | 47% | 57% | 56% | 33% | 63% |
| Retail offer - clothes, gifts | | 54% | 57% | 64% | 33% | 60% |
| Independent shops | | 30% | 43% | 66% | 4% | 27% |
| National Chains | | 43% | 30% | 56% | 30% | 40% |
| Value for Money | | 21% | 11% | 40% | 11% | 20% |
| Customer service | 8% | 13% | 9% | 27% | 4% | 17% |
| Cafes/ restaurants | 5% | 14% | 14% | 34% | 7% | 7% |
| Access to services | 5% | 46% | 11% | 29% | 83% | 60% |
| Leisure facilities | 9% | 48% | 32% | 68% | 46% | 50% |
| Cultural activities/event | 9% | 44% | 25% | 63% | 46% | 37% |
| Pubs/ bars/ nightclubs | 10% | 27% | 34% | 41% | 20% | 20% |
| Road links | 28% | 37% | 41% | 58% | 37% | 30% |
| Traffic | | 53% | 59% | 65% | 57% | 47% |
| Public Transport | | 24% | 14% | 26% | 9% | 40% |
| Ease of walking | 5% | 8% | 5% | 11% | 4% | 3% |
| Convenience | 5% | 14% | 9% | 18% | 4% | 30% |
| Safety | 7% | 28% | 23% | 38% | 26% | 23% |
| Car parking | 41% | 39% | 32% | 56% | 46% | 30% |
| Markets | 9% | 48% | 60% | 72% | 13% | 53% |


Negative Aspets for Users
Other
Markets
Car parking
Safety
Convenience
Ease of walking
Public Transport
Traffic
Road links
Pubs/ bars/ nightclubs
Cultural activities/event
Leisure facilities
Access to services
Cafes/ restaurants
Customer service
Value for Money
National Chains
Independent shops
Retail offer -clothes, gifts
Retail offer - groceries
Cleanliness
Physical appearance
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%
Old High Street
Kirkley
Town Centre (online)
Town Centre (on-street)
National

The responses from the town centre users indicate a sample from this mid-week survey that comprises a modest average majority of females (57%). There was a good spread of age categories which are broadly comparable with national benchmarks although there were a significantly higher number of over 65-year olds from the town centre on-street survey (43%) than elsewhere in town, online or the national average (18%).

Analysis of the age profiles for on-street and online town centre users reveals a much younger profile amongst online respondents with 51% under 45 years-old compared to only 32% of people surveyed in town. It is important to understand more about the different needs and customs revealed about this younger age profile of town centre users.

The figures for purpose of visit show that amongst the high town centre footfall, a significant number are there to access services (27%) and for leisure (16%). There is an even split between comparison (20%) and convenience (20%) shoppers in the town centre which is distinct to trends in comparable towns nationally where convenience shoppers are more prominent. This may be due to an absence of large, town centre supermarkets.

The Old High Street users (43%) were largely in town for leisure; much higher than the national average (13%). Leisure is also the most popular reason for visiting Kirkley (28%) though it also has the highest proportion of convenience shopping. The average data for East Suffolk is greatly skewed by the fact that 27% of Old High Street users sampled, selected ‘other’ for purpose of visit.

A high proportion of mid-week users of the town centre surveyed on-street visit more than once a week (57%) that is comparable with other large towns nationally (55%). In contrast only half of this proportion of the on-line respondents visit the town centre more than once a week (27%) and 36% visit once a month or less. This suggests a seemingly untapped market and perhaps the potential for an enhanced town centre and Old High Street offer to attract more loyal users. The Old High Street (33%) and Kirkley (28%) attract a greater proportion of daily users even when considering combined on-street and online respondents, while only 17% use the Old High Street daily.

A very high proportion (62%) of users came into town on foot, particularly high in Kirkley (72%) and Old High Street (70%), whilst 43% travelled on foot to the town centre. This is significantly higher than the national average of 31%. Conversely, on average less people travelled by car (23%) compared to the national average of 58%. A majority of town centre users (28%) on average spend in between £5 and £10 on a visit to the town centre, which is higher than the national average. A very small percentage in the Old High Street (5%), the town centre (5%) and Kirkley (0%) spend more than £50, which is significantly lower than the national average. Over two-thirds of the town centre users surveyed spend less than 2 hours in town and are therefore are fairly functional in their use of it, consistent with larger town centres nationally. Use of the Old High Street and Kirkley is almost exclusively limited to trips of less than two hours.

When asked if town centre users would recommend a visit to Lowestoft town centre, there was a wide range of responses between online and on-street users. Town centre (52%), Kirkley (94%) and Old High Street (67%) users said yes compared to 79% online users who would not recommend a visit to Lowestoft. Again, these figures indicate strongly that the town centre and these secondary areas do not appeal to a large and arguably, untapped local market.

When asked about the positive aspects of Lowestoft as a whole, convenience (78%) ease of walking (70%), customer service (68%) and cafes and restaurants (58%) were all valued by town centre users. All of these levels of response are significantly higher than with other towns nationally.

Looking more at the detail between the different areas of Lowestoft, ease of walking (91%), value for money (84%), access to services (84%), convenience (84%) and customer service (82%), were highly valued by on-street town centre users. Online town centre users valued ease of walking (71%) and convenience (52%) though generally were much less positive in their perceptions of Lowestoft town centre.

Old High Street users valued convenience (90%), car parking (70%) and cleanliness (70%) most highly. Kirkley users valued ease of walking (89%), convenience (87%), independent shops (85%) and customer service (85%) as positive aspects.

In terms of negatives, there were fewer responses than positives, with retail offer e.g. clothes, gifts (54%), parking (57%), physical appearances (52%) and retail offer e.g. groceries (52%) rating poorly with town centre users.

Town centre (66%) users interviewed on-street considered the physical appearance (61%), market (60%), traffic (59%), grocery shopping (57%) and comparison shopping (57%) as the most negative aspects. Online respondents were similarly negative about the market (72%), physical appearance (66%), comparison retail offer (64%) and traffic (65%) of the town centre, along with additionally independent shops (69%), leisure facilities (68%), cultural activities (63%) and car parking (56%).

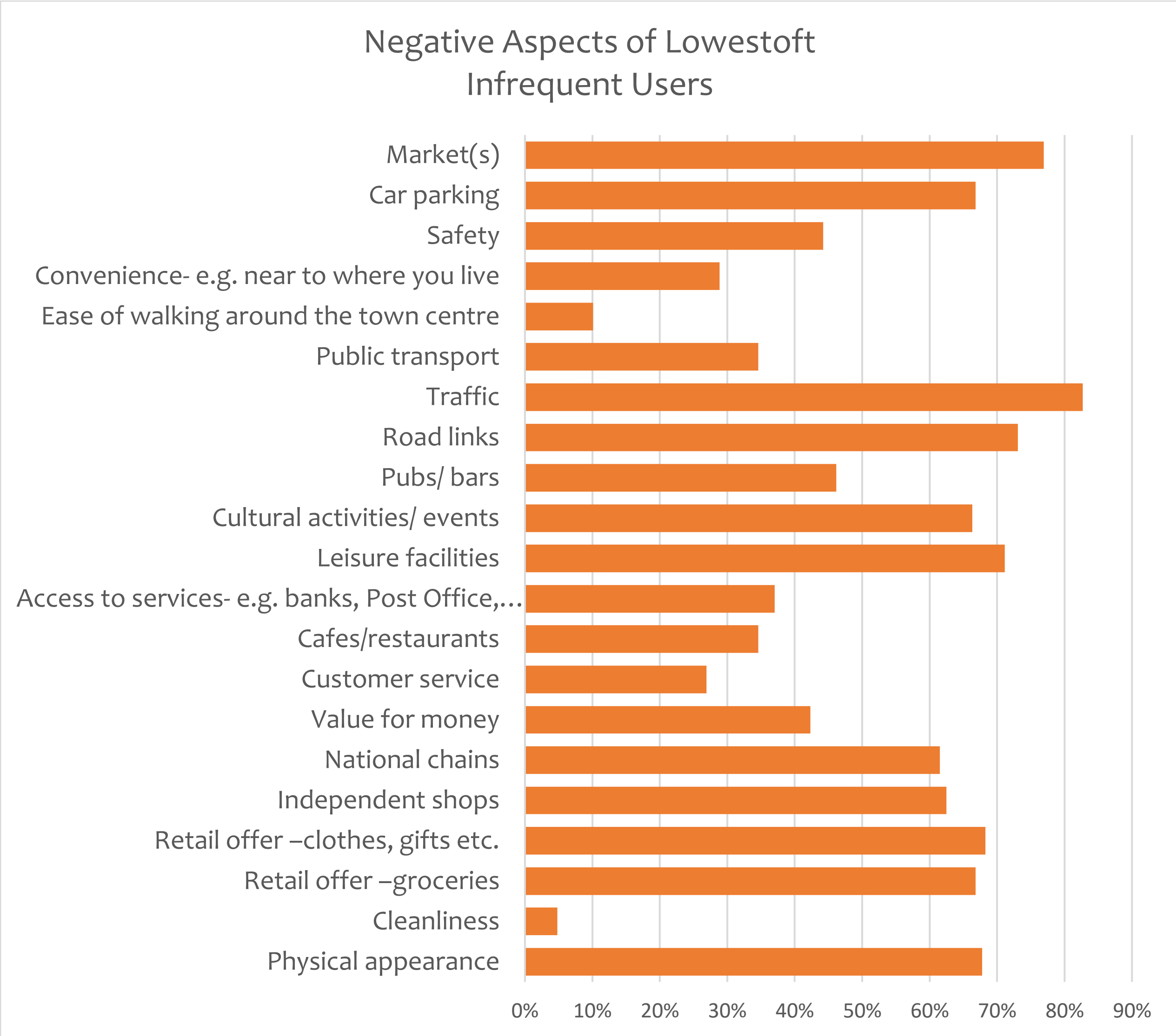
Old High Street users were most critical about the convenience (63%) and comparison (60%) retail offers, access to services (60%), market (53%) and leisure facilities (50%).

Kirkley users rated access to services (83%) as by far their most negative aspect followed only by traffic (57%) receiving a negative review by over half of respondents.

### Infrequent users

As part of the on-line survey undertaken for Lowestoft, it was possible to separate out the perceptions of people who were infrequent users of the town centre and visited it fortnightly or less. The chart below demonstrates, these infrequent users echo others' frustrations with traffic (83%), markets (77%) and road links (73%), followed closely by leisure facilities (71%), retail offer (68%) physical appearance (68%) and parking (67%). There were also negative responses regarding independent shops (62%) and national chains (61%).

Though a small proportion of these respondents were from further afield, the majority were local to Lowestoft and this give a sense of the sentiments of people who are less frequently using their nearest town.



Negative Aspects of Lowestoft
Infrequent Users
Market(s)
Car parking
Safety
Convenience- e.g. near to where you live
Ease of walking around the town centre
Public transport
Traffic
Road links
Pubs/ bars
Cultural activities/ events
Leisure facilities
Access to services- e.g. banks, Post Office,…
Cafes/restaurants
Customer service
Value for money
National chains
Independent shops
Retail offer –clothes, gifts etc.
Retail offer –groceries
Cleanliness
Physical appearance
0%
10%
20%
30%
40%
50%
60%
70%
80%
90%

*Two suggestions to improve the town centre?*

When customers of Lowestoft were asked what two things would improve the town centre, the overwhelming response related to retail with parking, improving amenities and traffic and transport following.

| Category | Town Centre (on-street) | Town Centre (online) | Kirkley | Old High Street | Total |
|---|---|---|---|---|---|
| Amenities | 10 | 33 | 10 | 3 | 56 |
| Community | 6 | 3 | 1 | 0 | 10 |
| Crime & safety | 1 | 16 | 1 | 1 | 19 |
| Employment | 1 | 1 | 2 | 1 | 5 |
| Empty shops | 0 | 8 | 7 | 1 | 16 |
| Events/ activities | 2 | 14 | 1 | 5 | 22 |
| Heritage | 0 | 1 | 0 | 5 | 6 |
| Investment & planning | 5 | 10 | 3 | 3 | 21 |
| Market | 1 | 12 | 0 | 9 | 22 |
| Parking | 7 | 44 | 5 | 6 | 62 |
| Restaurants & cafes | 2 | 10 | 2 | 0 | 14 |
| Retail | 19 | 108 | 14 | 12 | 153 |
| Traffic & transport | 7 | 16 | 8 | 3 | 34 |
| Other | 0 | 2 | 0 | 0 | 2 |

*Amenities (56)*

- Cleaner streets (5)
- Clean streets - litter, dog poo, bird mess and chewing gum & seagull mess (5)
- General tidy up of area (5)
- Give the town centre a face lift (3)
- Get rid of seagulls and their droppings (3)
- Get drinkers/druggies out of town (2)
- Clean and tidy the buildings up (2)
- More greenery to liven appearance (2)
- Cleaner pavements!
- CLEANER!!! The place is filthy. Not enough bins.
- Cleaning up the beach, dog poo
- Dog friendly
- Dog owners to be encouraged to pick up dog mess
- Council funding to improve the appearance and attraction of the high street.
- Bring back some greenery to the area
- Flower beds
- More green areas
- More natural beauty, trees, flowers, benches to appease the eye.

- Fix the lights on the floor and do something with the phone boxes
- Raised flower beds to create walkways, and points of interest.
- Green area near beach needs some improvement, for family and tourists
- Water features, garden like spaces and coloured paths
- General upgrading of the area
- Re-tile High St modern tiles patterned, attendant toilets, improve all roundabouts, trees & shrubs/flowers.
- Improve town centre appearance
- Improve Wellington Gardens, planting scheme is not very exciting
- Litter wardens
- Make the town actually a nice place 2 go cus it smells like shit
- More bike racks to encourage cycling.
- More physical things to break up the ling open street appearance
- Needs a big overhaul
- Needs a revamp
- Paint
- Pavement repairs
- Provide town-wide free Wi-fi
- Public Piano
- General upgrading of the area

*Community (10)*

- Help the homeless, better facilities (4)
- Leisure activities & facilities (2)
- More facilities for children/young people (2)
- More baby changing facilities
- Seating inside shops for disabled people

*Crime & Safety (19)*

- Better policing to reduce anti-social behaviour (7)
- Get rid of drunks, drug dealers & teenage gangs by having more visibility of police officers (4)
- Make the area feel safer (2)
- Have police to tackle the noisy intimidating youth
- Improve security so people could safely leave cycles locked up
- Less antisocial behaviour
- Remove drunks from near McDonald's
- Make the no go areas safe
- More bike lockups

*Employment (5)*

- Increase employment opportunities (2)
- More jobs...too many businesses are closing down or moving out of town
- Job creation schemes

- Need for employment and industry, need more of a spectrum of employment

*Empty Shops (16)*

- Fill empty shops (6)
- Empty premises made useable and maintained
- Empty shops cause problems and look unsightly
- Empty shops should be left tidy if tenants move out, estate agents should be accountable
- Accept that there are too many vacant shops, turn some into small residential units.
- Find uses for empty buildings
- Some shops have been empty for years
- Clean up closed premises
- Get rid of all the empty premises
- Tidy up and regenerate empty shops, put onus on landlords, this should be law
- Empty shops to have a Lowestoft themed window film promoting local areas of interest

*Events/Activities (22)*

- More regular, cultural community events (7)
- More events Easter parade carnival, etc
- Organize events better
- Allow more street activities/business
- Offer - no reason to visit
- A car boot sale
- Make it an entertainment for family e.g. bowling, quasar soft play leisure centre cinema
- A larger insensitive to go in Winter, Summer is great due to the beach nearby, but there's a reduced amount of things to do in the town centre during Winter
- Encourage buskers
- Bowling, trampoline, cinema, leisure facilities
- Make it a sociable place to visit
- More lively atmosphere
- More celebrations
- More entertainment/pleasure park in the old town area
- Amusement on the front
- More for teenagers

*Heritage*

- Retain a traditional feel. The word "Modern" does not fit Lowestoft. Everything contemporary looks out of place and dates too quickly.
- What's happening with the town hall?
- Highlight the older area more, from the town
- Something to attract shoppers over the road in to the old town
- Keep in touch with the historical aspect, or go ultra-modern in the buildings
- Tidy up the historical buildings

### *Investment & planning (21)*

- Regeneration (2)
- Rejuvenate the town centre (2)
- Cash injection
- Investment in the town in general
- Needs a shake up
- Re-modernise High Street
- Modernisation is vital
- Open your eyes powers that be its dying.
- Force owners to renovate their properties
- Increase advertisement
- Re-designate a significant amount of space as residential
- Improve planning decisions
- Improve Britten centre
- Stop the county council controlling local decisions
- Start spending council money more wisely
- Start-up businesses encouraged in to the area
- More small business
- More industry, such as wind farm
- A phased approach to retail rejuvenation. Incentivise established businesses to open in Lowestoft by offering reduced rents and less regulation - less risk for them. The town needs to become a destination, for which you need shops that cater to all ages, restaurants (affordable chain restaurants such as italian food or Nandos etc), nicer places to grab a sandwich (Pret, Eat etc). Stimulate this by allowing for cashless payment for parking, safer, better lit and facilitated walking routes through the town and better policing of anti-social behaviour (especially around the library). Improve traffic by adopting a similar one-way system for traffic similar to that which has been in place during the sewerage works opposite the station. Ask businesses to improve the look of their store-fronts and encourage better transport and walking links between the town and the seafront - in the summer this would pay dividends!

### *Market (22)*

- Bring back the market (7)
- Bigger and better market (7)
- Sort out the covered market area (2)
- Bring back decent market stalls akin to Norwich
- Should be a proper market
- Market place
- Good market, on several days.  Speciality markets monthly.
- Nice market
- We are a market town without a market so technically we are a village

*Parking (62)*

- Free parking (17)
- Reduce parking charges (11)
- Free 1 hour parking (4)
- Free parking to encourage visitors (2)
- Improve parking (2)
- Better parking (2)
- Improved parking (2)
- Free or cheaper parking (2)
- Free parking to compete with retail parks (2)
- Free and more parking
- Free parking on Sunday's and Saturday afternoons in certain car parks
- Free parking or one-way system to make Lowestoft more accessible
- Free parking after a certain time, during peak times
- Free/Reduced parking, more and easier parking.
- Cheaper parking, particularly for older people and businesses.
- Sort out illegal/dangerous parking.
- Attract more businesses by free parking twice a week, lowering business rates, a nice Thursday market in Bevan street East
- Justify why I would pay to park and visit a run-down area used as dumping ground for social housing.
- Parking
- Sort traffic and car parking out.
- Improve parking make some of it free at different times in different areas
- Parking for residents needs to be improved and thought about further
- More on street parking but short time
- Parking enforcement officers to be employed
- Better parking facilities
- More parking
- Short stay parking needs to be improved

*Restaurants & cafes (14)*

- More restaurants (3)
- Better cafes (2)
- Artisan bakery
- Independent coffee shop
- More evening traders pubs cafes etc
- Get more bistro like places where people can meet and not pay through the nose for it. This is deprived area nowadays, not the affluent one it once was...
- Restaurants, bars and better parking facilities
- Restaurants/Bars
- No more Cafe's
- Takeaway establishments need to be responsible for their litter

- Sports bar

*Retail (153)*

- More shops (27)
- Lower business rates to attract more retailers, independent & more variety (10)
- Better quality shops (9)
- More independent shops (9)
- A Primark Store (8)
- Lower shop rents to encourage businesses (8)
- Less charity and more variety (6)
- Better shops (5)
- More variety of shops (4)
- Another supermarket (3)
- Need more large chain stores
- Add bigger chain shops like JD etc
- Attract some national chains into the town centre
- Ban charity collectors
- Better clothes shops
- A good butcher
- A larger shopping centre
- Bring in more known stores
- Bulldoze and start again. Quality shopping experience away from central Lowestoft.
- Cafes, shops overlooking sea
- Change the nature of the area, leave shopping to the retail parks and make it tourist based and leisure based
- Complete lack of any nice shops, by the time i have queued in traffic for 20 minutes to get into town all I am presented with is card shops, phone shops and pound shops. Nothing of quality to buy or no restaurants worth eating at. I only go to town because its within walking distance on my lunch breaks. Otherwise Norwich is the place to be, nice shops, nice restaurants and generally a nice place to be
- Council to spend money on better shops
- Do up the shop fronts
- Drop the rent so we could have some nicer shops as full of the same shops. Not a pleasure to shop anymore
- Either encourage more diverse business
- Encourage bigger brand shops/restaurants
- Encourage independent businesses through reduced rates to make it an attractive place to have a business
- Encourage local traders into the town centre who can compete with chains...Waveney Council lower rent and support local business.
- Force land lords to lower rent prices. Otherwise, slowly, the whole high street will end up boarded up
- Get Shops worth visiting in town
- Get some nice shops.

- Gift shops
- Have to go Norwich for clothing
- Help independents set up and stay
- Increased variety of outlets, reduction in charity shops with an increase in general high street stores
- Independent shops
- Invest to attract new and trendy shops
- Less phone shops
- Less shops shutting
- Make it more appealing for new businesses to come and trade, rate reduction
- Make these shops clean and respectable. Even the big branded stores in town are dirty
- Market place to improve independent shops
- Money spent to bring shopping centre up to date
- More big chain shops, which are now only on retail parks
- More brand name shops/cafes
- More brands
- More clothes shops
- More decent shops
- More decent shops, less charity and phone shops
- More exciting shops
- More local trade
- More quality shops and a community feel
- More regular late-night shopping
- More shops (too many sitting empty)
- More shops ladies clothes for example
- More shops less cheap shops
- More shops, higher end, fat face
- More than bookies in the area
- More up to date shops
- More variety of shops i.e. children's / teenage clothing
- National chains, almost everyone has to go to Norwich for what they want.
- No more cheap crappy shops
- Obtain a large chain store i.e. Primark to open a store giving a reason for others to visit town therefore spending money on parking eating out and visiting other stores
- Offer good deals for new shops wanting to rent a premises
- Put high quality shops in town centre empty outlets
- Reduce rates to get better businesses in for either clothing or restaurants not keep putting McDonalds up giving different companies a go
- Shops cinema complex would be great
- Shops open later
- Short leases on shops to encourage craft folk.
- Somewhere other than Peacocks to buy boys/teen boys clothes
- Stop people going elsewhere to shop and bank
- Too many hairdresser and charity shops

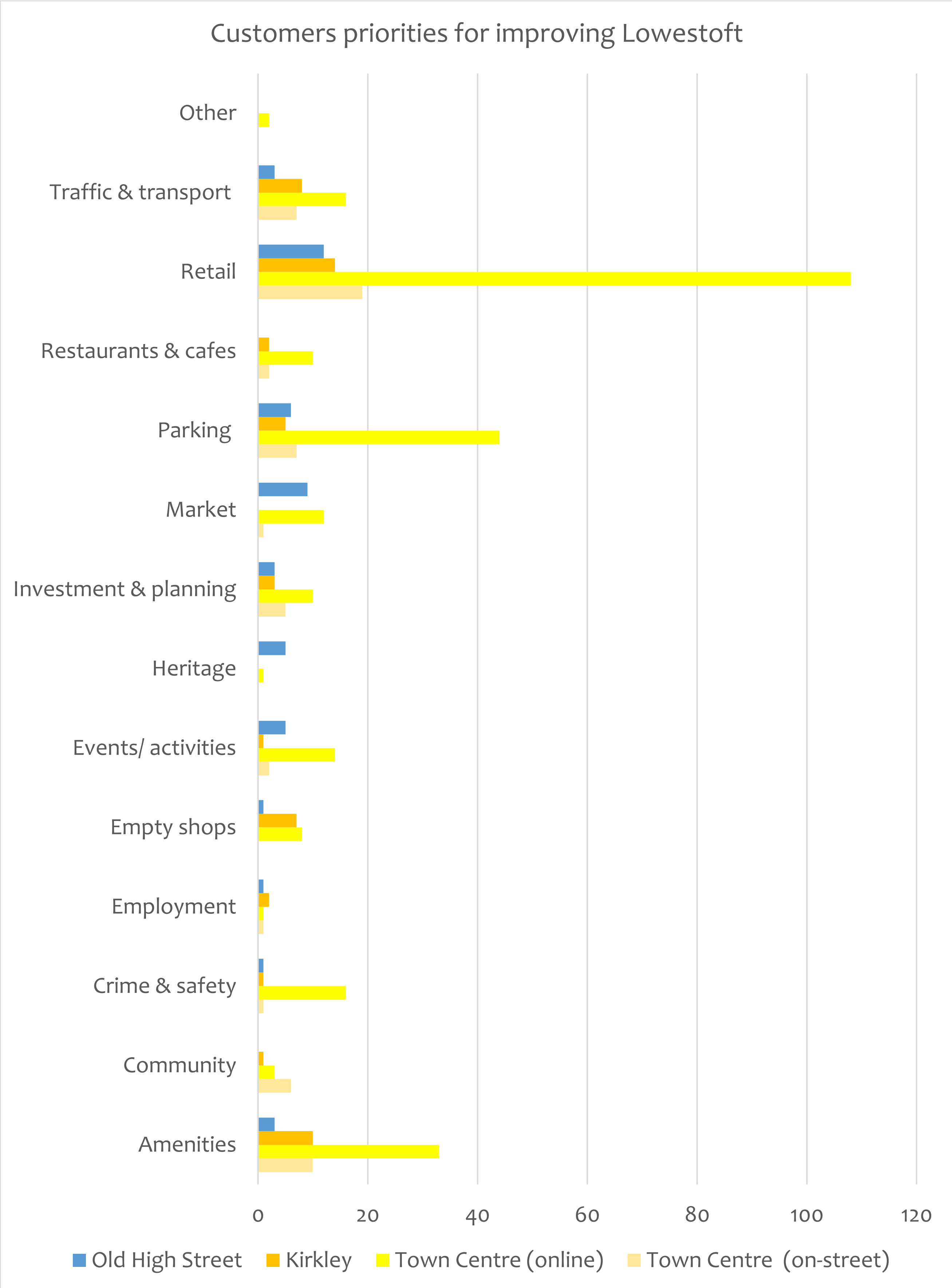
- Toy shops

*Traffic & transport (42)*

- One-way road system could be good (3)
- Traffic warden enforcement needs to be better (3)
- A complete redesign of the bus station for better passenger comfort
- Better cycling facilities
- Better road network and traffic management
- Better roads
- Better walking facilities
- Build the new bridge
- Bus route
- Cyclist should be encouraged to cycle on road
- Improve the road network
- Increase bus route possibly would increase people on foot
- Pedestrian crossings need to be quicker, seem very slow
- Prevent Gordon Road being used as a cross-town route for vehicles
- Reinstate the canopy at the railway station
- Sort the road networks out in and out and around town
- Clearly marked cycling areas for pedestrians to be aware of.
- Crossing areas
- Improve the road system, traffic management needs to be better
- Improve traffic management
- Lower the speed limit
- More to get people crossing the road in to the area
- More traffic management, less traffic on high street
- One way traffic from Triangle to Falcon Pub take away parking restrictions
- Pedestrian areas
- Reduce number of traffic lights around ring road
- Remove vehicles from the supposedly pedestrianised zones
- Road systems not well thought out
- Sort traffic flow
- Stop cyclists causing a danger to pedestrians

*Other*

- Do what Southwold does
- A boards and shop displays restricting paths


Customers priorities for improving Lowestoft
Other
Traffic & transport
Retail
Restaurants & cafes
Parking
Market
Investment & planning
Heritage
Events/ activities
Empty shops
Employment
Crime & safety
Community
Amenities
0
20
40
60
80
100
120
Old High Street
Kirkley
Town Centre (online)
Town Centre (on-street)

**What word would you use to sum-up the town centre?**

The word cloud below gives an indication of the most popular words used by town centre users to sum-up the town centre, Kirkley and Old High Street.

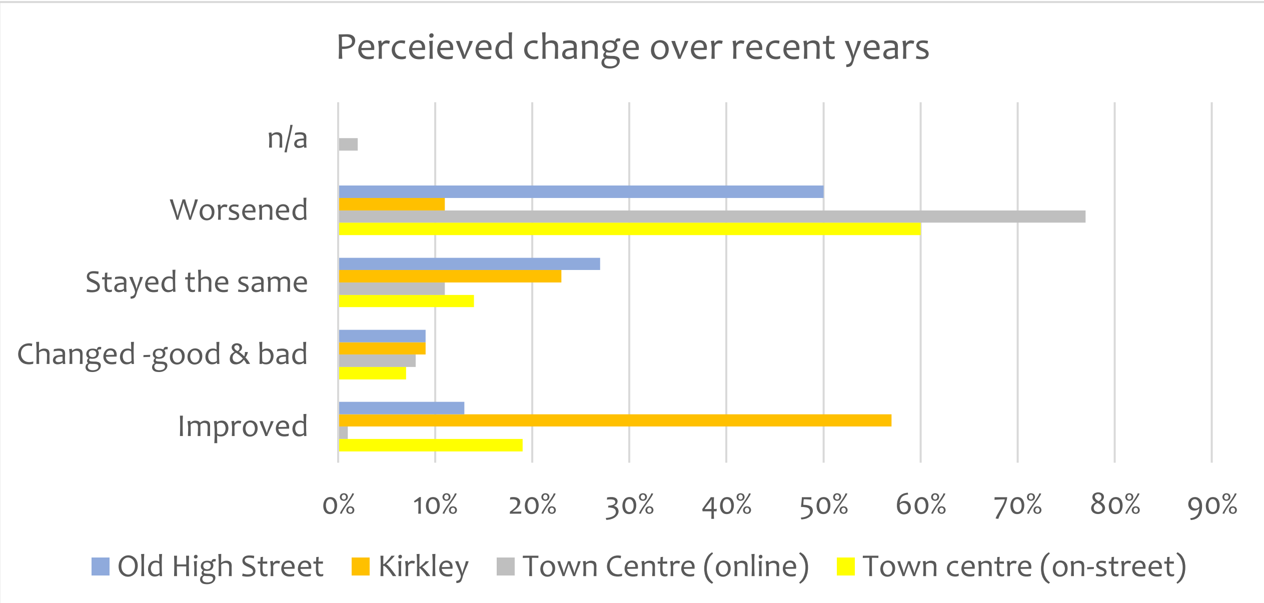


Such word clouds, whilst only indicative, are useful in understanding how the town is perceived by current users who are familiar with it.  It can helpful in determining how the town can be honestly promoted to potential new users in a way that creates achievable expectations as well as monitoring future changes in perceptions.  For Lowestoft town centre the most prominent words are negative ad include rundown, tired, outdated and depressing.  There is more of a balance in the most prominent words used for the Old High Street between positive points such as quaint, historic and good, and negative perceptions such rundown.  The most prominent words for Kirkley are positive and include improved, improving, good, quaint and friendly, though there are also some less prominent negative sentiments.

### Changing town centre experience

As with the sense of self-image from the one-word summary, this question can give a good indication of progress if when posed again in one to two-year's time the answers reflect a much stronger sense of positive progress. When asked how their experience of Lowestoft there were contrasting answers for different parts of town.  When asked how the town centre had changed in recent years, 60% of on-street users and 77% of online town users said it had improved worsened.  This compares to 19% and only 1% respectively who said it had improved.  Half of respondents considered that the Old High Street had worsened (50%) compared to only 13% who thought it had improved.  In contrast, over half of on-street respondents in Kirkley thought it had improved (57%) and only 11% thought it had worsened.

| How has the experience of Lowestoft changed for you in recent years? | | | | |
|---|---|---|---|---|
| | **Town centre (on-street)** | **Town Centre (online)** | **Kirkley** | **Old High Street** |
| Improved | 19% | 1% | 57% | 13% |
| Changed -good & bad | 7% | 8% | 9% | 9% |
| Stayed the same | 14% | 11% | 23% | 27% |
| Worsened | 60% | 77% | 11% | 50% |
| Not appropriate | 0% | 2% | 0% | 0% |

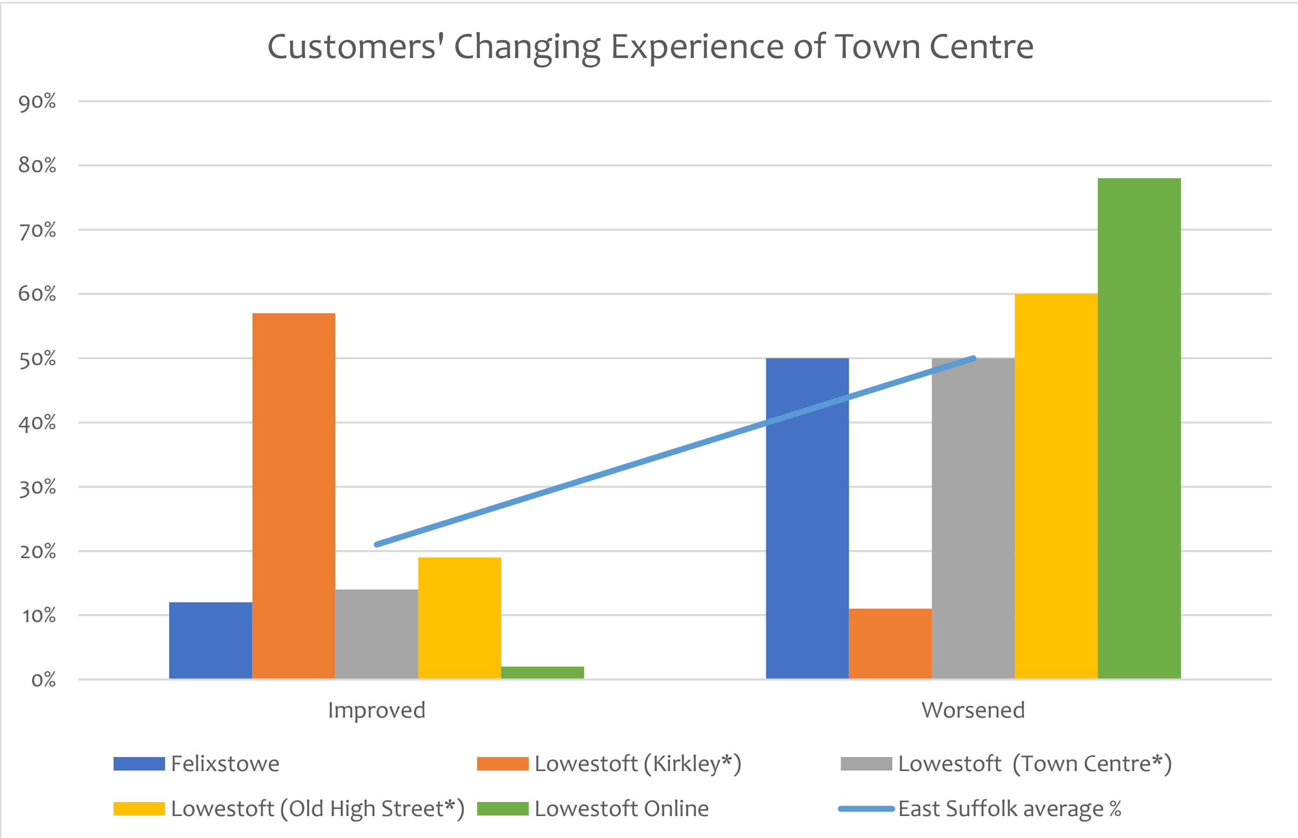


## *East Suffolk Large Towns Comparisons (customer experience)*

Across the large towns, the most positive balance between perceived improvement (57%) and worsening (11%) of the experience is shown by Kirkley customers. Indeed, Kirkley shows the highest proportion of positive perceptions for all East Suffolk towns -large or small.

In contrast to Kirkley, the other areas of Lowestoft along with Felixstowe, have a more negative balance in terms of customers' perceptions of the changing experience. The most negative balance of perceptions was amongst Lowestoft town centre customers surveyed on-line that includes more infrequent visitors. Lowestoft town centre customers surveyed on-street had slightly better perceptions of the changing experience with 14% indicating the experience had improved in recent years compared to 50% who thought it had worsened. Users of the Old High Street showed marked differences in perceptions between 19% who thought it had improved compared to 60% who thought it had worsened.

Despite generally more positive perceptions of the characteristics of Felixstowe town centre, customer sentiments about the changing experience showed a negative balance between 12% who thought it had improved and 50% who thought it had worsened in recent years. This sample does include on-line respondents who tend to visit the town centre less frequently and are more negative in their perceptions.



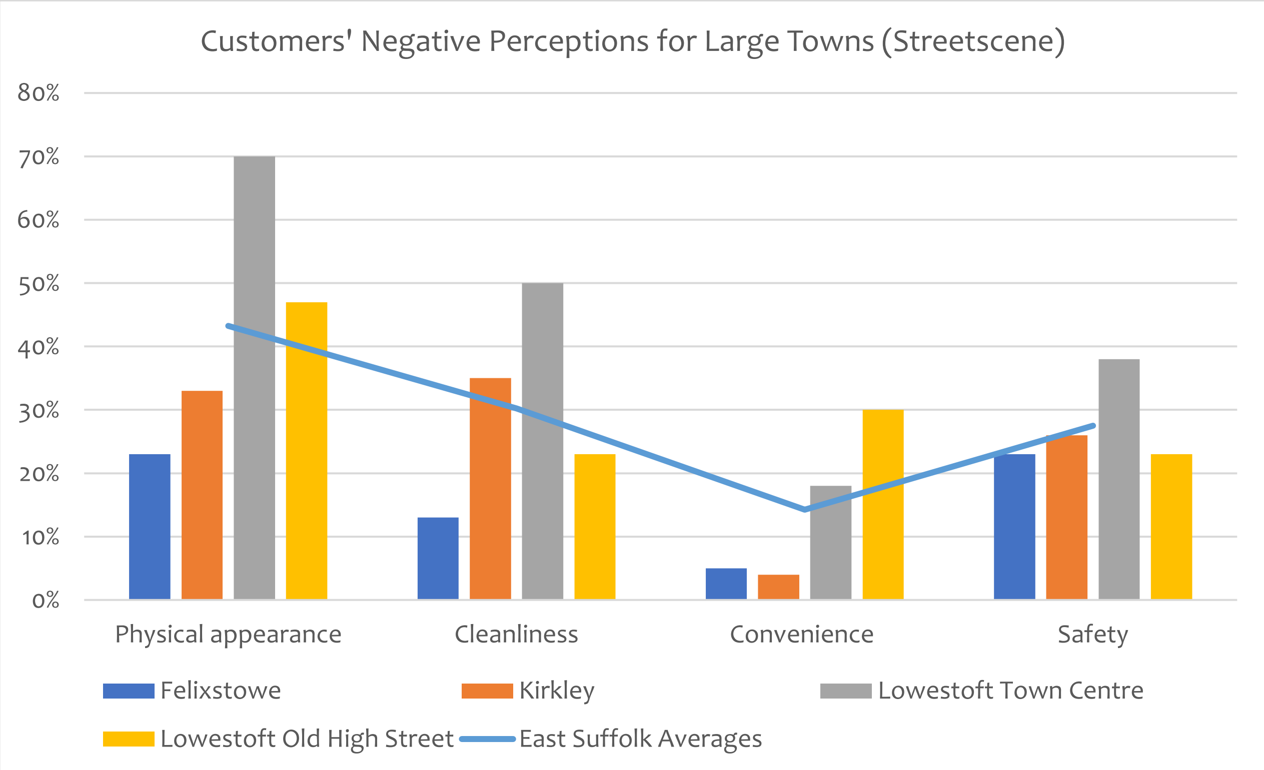

**Includes customers surveyed 'on-street' only.*

*East Suffolk Large Towns Comparisons (customer perceptions)*

Here we analyse customers' responses about their negative perceptions of the different town centres against an average response for large, East Suffolk towns. Issues are grouped in to related sub-categories to ease interpretation.

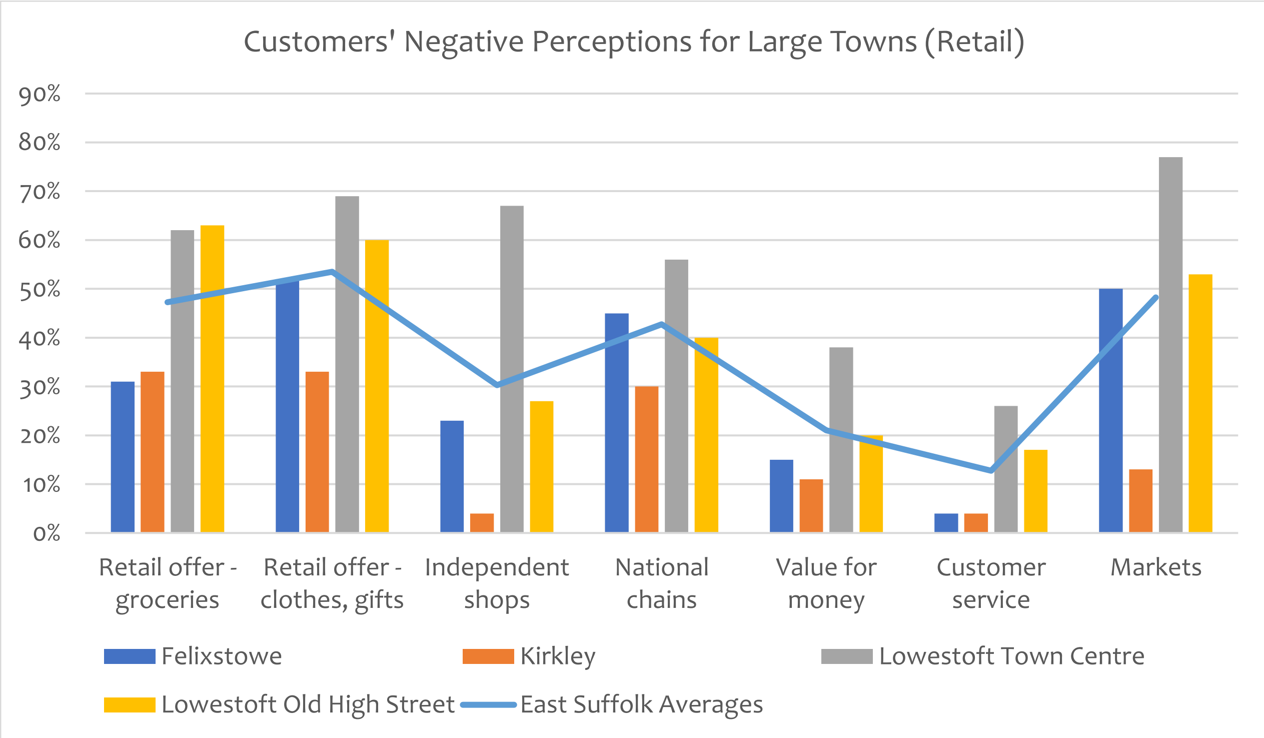
## Street-scene

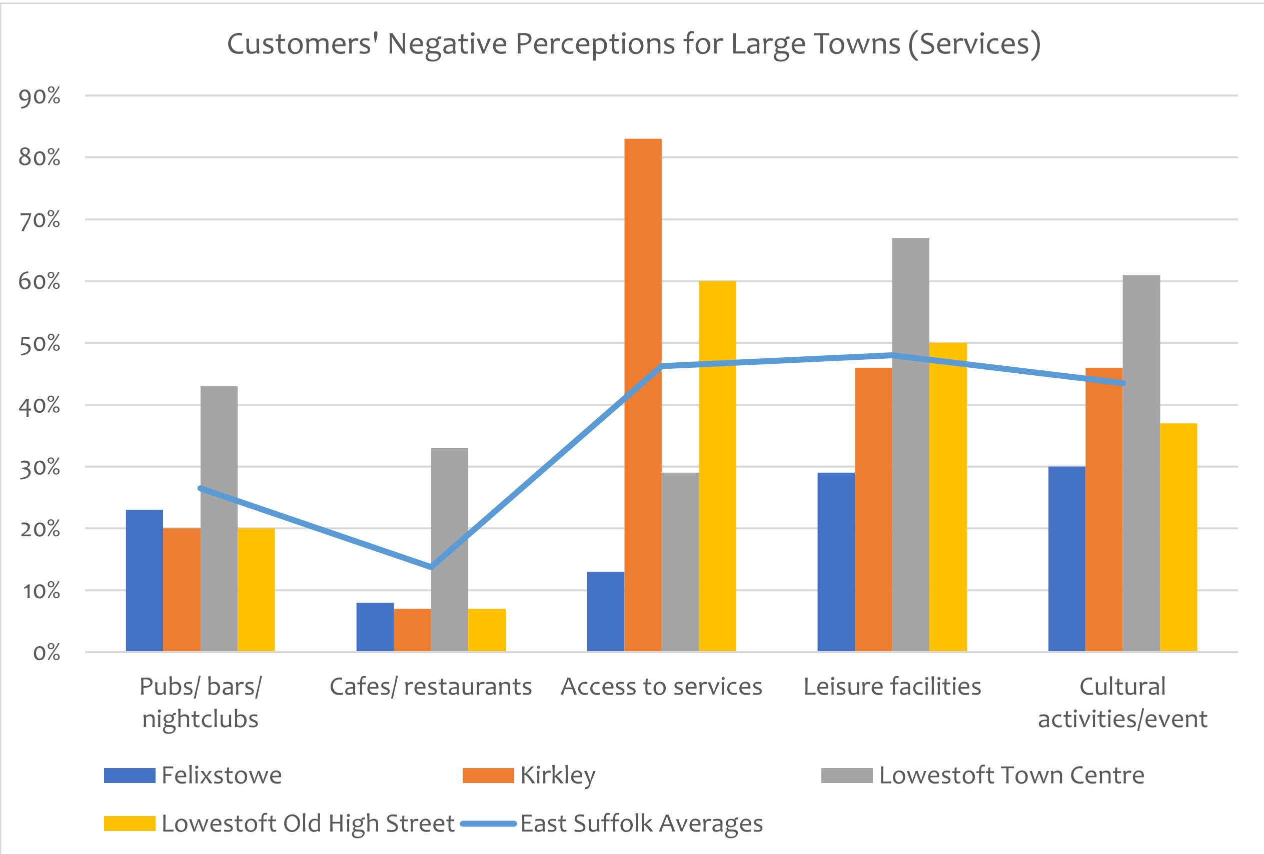
Customers in Lowestoft town centre gave the most negative responses of all East Suffolk about the physical appearance and cleanliness. In contrast, only a small proportion of Felixstowe customers gave negative responses with percentages comparable with many of the smaller towns.




## Retail

The retail offer was negatively perceived for Lowestoft town centre in terms of the grocery offer, fashion, gifts and market. The independent retail offer was also negatively perceived though this was compensated for by more positive perceptions for Kirkley and the Old High Street. Opinions were more divided about the retail offer in Felixstowe with only fashion/gifts and the market rated negatively by 50% of more of customers.


Customers' Negative Perceptions for Large Towns (Retail)
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Retail offer - groceries
Retail offer - clothes, gifts
Independent shops
National chains
Value for money
Customer service
Markets
Felixstowe
Kirkley
Lowestoft Town Centre
Lowestoft Old High Street
East Suffolk Averages


Customers' Negative Perceptions for Large Towns (Services)
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Pubs/ bars/ nightclubs
Cafes/ restaurants
Access to services
Leisure facilities
Cultural activities/event
Felixstowe
Kirkley
Lowestoft Town Centre
Lowestoft Old High Street
East Suffolk Averages

## Services

Customers have a broadly positive perception about the hospitality offer in East Suffolk's two large towns. Although over 40% of customers are negative about provision on Lowestoft town centre, this is complemented by higher satisfaction levels for the Old High Street and Kirkley. In terms of sentiments about axes to services in Lowestoft, the relationship between the town centre and adjacent areas is reversed; customers in Kirkley are very negative about access to services there while sentiments are more positive about the town centre.

Customers in Felixstowe show similarly positive sentiments about access to services, leisure facilities and cultural activities/events that are on a par with many of the smaller towns. It might normally be expected that customer satisfaction with such services would be better in larger towns as provision is usually more extensive.

## KPI 11: Shoppers Origin Survey

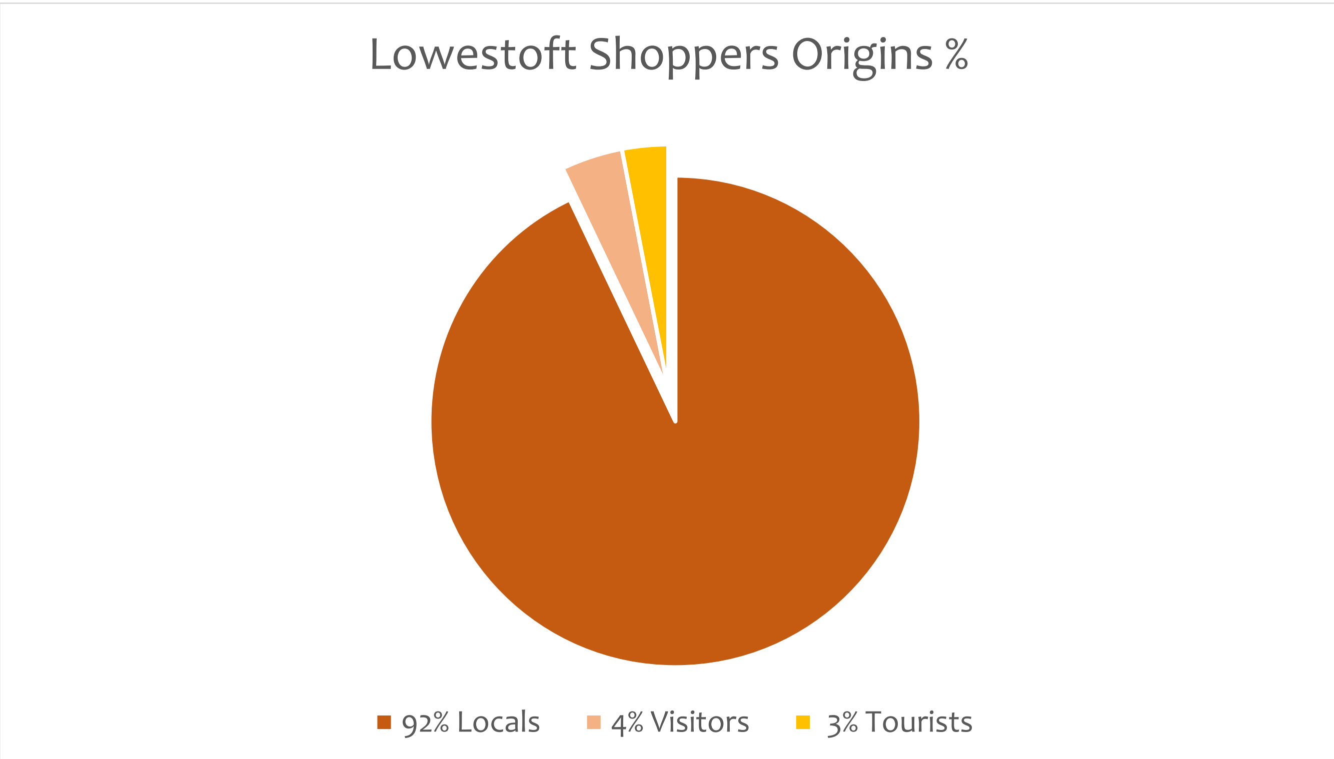
The shoppers' origin survey tracks the general area that your town centre visitors originate from. The data can be used to target local marketing or promotional literature. It can also be used as evidence of the success of such campaigns by gauging the penetration into the population.

The postcodes gathered from businesses are split into 3 categories to be able to compare with other towns. The categories are:

- Locals; those who live within a Post Code covering the town
- Visitors; those who live within a Post Code less than a 30-minute drive away
- Tourists; those who live within a Post Code further than a 30-minute drive away

| | National Towns % | Lowestoft | Lowestoft % |
|---|---|---|---|
| **Locals** | 66% | 454 | 92% |
| **Visitors** | 27% | 22 | 4% |
| **Tourists** | 7% | 16 | 3% |

The figures for shoppers' origin for Lowestoft town centre from this survey indicate that the majority of town centre users live locally and that 92% come from within 30 minutes of the town.  This information suggests that, in winter at least, local customers are the priority.



## KPI 12: Digital Development

As part of this baseline survey of the town centre, an initial 'digital diagnosis' was undertaken to understand development challenges and priorities. The diagnostic approach taken draws on the findings of Digital High Street 2020 Report and Digital High Street Index. This gives an appropriate framework for a broad perspective and to initially provide indicative and comparable information to help determine more in-depth research needs.

The Digital High Street Index involves measuring key indicators of the economic performance of a place alongside those for digital activity using 4 dimensions:

i. Skills: Do businesses have the appropriate skills (this can be the main focus of initial questions in business survey)
ii. Infrastructure: Does the town have appropriate infrastructure in terms of Wi-Fi and mobile phone network (this can be measured initially as a simple on-line check)
iii. Town Attractiveness: This seeks to correlate the appeal of a town with digital engagement and footfall increases (this is covered by town surveys of course)
iv. Engagement: The level of community/customer digital engagement (this we can seek to initially assess with questions in town centre users survey and could be later tested/monitored separately using a WYDT report tracking actual activity.

### Digital Business Skills and Infrastructure

As an adjunct to the business survey, preliminary questions were asked to assess the current level of digital take-up and the priority given to them using a simple scoring system using the following questions:

What priority does your business currently give to:

a. Creation and management of business web site
b. Regular use of social media to promote business and engage with customers, e.g. Facebook, Twitter, Instagram
c. Generation and provision of on-line sales
d. Collection and analysis of customer data to help target marketing

A second question was asked about the priority for investment in digital infrastructure:

How important are the following to the future operation of your business?

a. Fast broadband connection
b. Digital phone network coverage
c. Town centre Wi-Fi coverage

### Customers' Digital Engagement

In the town centre users' survey, a corresponding set of questions was asked to give an indicative understanding of the level of digital uptake by customers and how they have engaged digitally as part of their visit and their strength of feeling around infrastructure provision:

As part of your visits to the town, how useful do you find:

a. Web sites about the town or businesses to help plan your visit in advance
b. Insights through social media about businesses, products, places to eat, things to do
c. 'Click and collect' or the ability to browse products as part of your visit
d. Updates from businesses about special offers, things to-do etc.
e. Digital phone network coverage
f. Town centre Wi-Fi coverage

**Analysis**

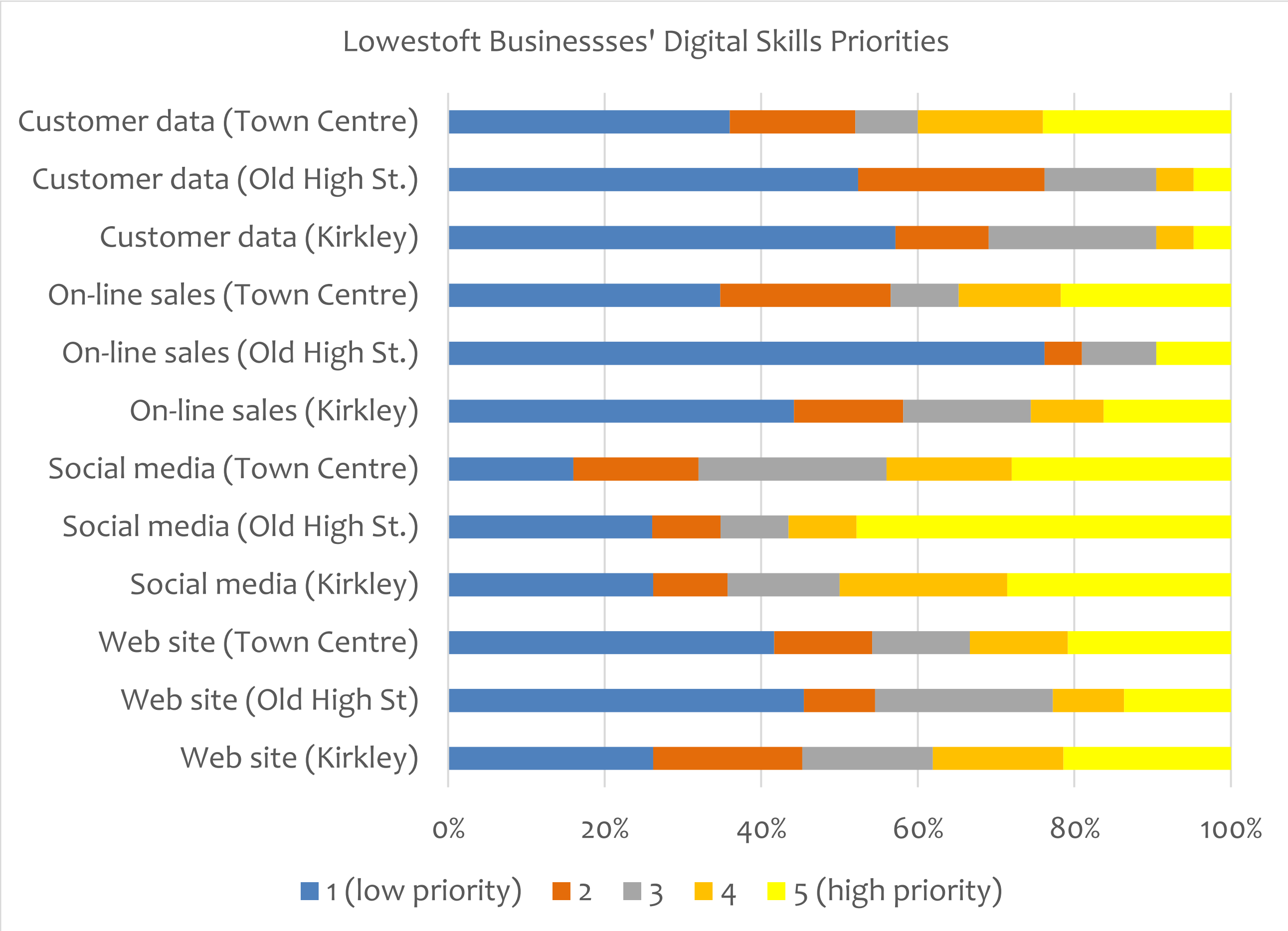
*Businesses*

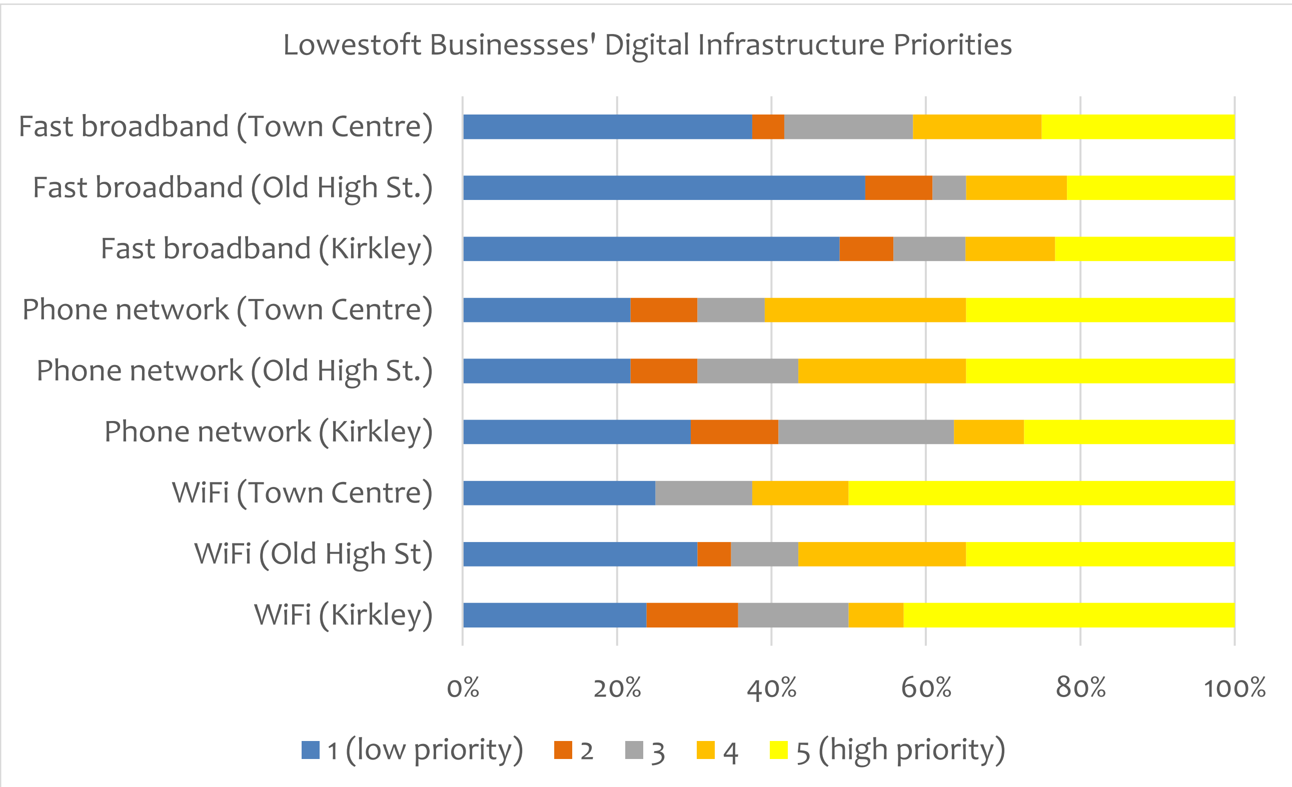
The table and charts below and overleaf show the current priority given by businesses to the take-up of digital skills and the priority given to town-wide investment in digital infrastructure. The data is presented as the per centage of businesses given to the different levels of priority between 1 (low) and 5 (high). A weighted average gives a single figure performance indicator that can be compared with other places including an East Suffolk average.

The data indicates a moderate though varied priority or state of readiness in terms of digital skills. A moderate priority is given to the basic requirement of creating and maintaining a business web site with a weighted average of 2.79. The highest average score for digital skills is given to the use of social media such as Facebook, Instagram and Twitter in business and product promotion with over half of Old Hight Street (57%), 50% of Kirkley and 44% of town centre businesses treating this as a priority or high priority. A lower priority is given to the more advanced digital skills necessary to provide on-line sales or use customer data for targeted marketing although these are treated as relative priorities (35% & 40%) by town centre businesses.

In contrast to the priority given to their own skills development, businesses give higher levels of priority to town-wide investment in digital infrastructure. The highest priority is given to Wi-Fi coverage with 63% of town centre businesses, 57% of Old High Street businesses and 50% of traders in Kirkley treating this as a priority or high priority. Town centre businesses (61%) and Old High Street businesses (57%) would like to see investment in providing improved digital phone network coverage.

| Businesses' digital skills & infrastructure priorities | East Suffolk average | 1 | 2 | 3 | 4 | 5 | L'stoft ave. |
|---|---|---|---|---|---|---|---|
| **What priority does your business currently give to?** (1= low; 5= high priority) | | | | | | | |
| **Web sites creation/management** | | | | | | | |
| Web site (Kirkley) | 2.88 | 26% | 19% | 17% | 17% | 21% | 2.88 |
| Web site (Old High St) | | 45% | 9% | 23% | 9% | 14% | 2.36 |
| Web site (Town Centre) | | 42% | 13% | 13% | 13% | 21% | 2.58 |
| **Using social media for promotion** | | | | | | | |
| Social media (Kirkley) | 2.81 | 26% | 10% | 14% | 21% | 29% | 3.17 |
| Social media (Old High St.) | | 26% | 9% | 9% | 9% | 48% | 3.43 |
| Social media (Town Centre) | | 16% | 16% | 24% | 16% | 28% | 3.24 |
| **Provision of on-line sales** | | | | | | | |
| On-line sales (Kirkley) | 2.16 | 44% | 14% | 16% | 9% | 16% | 2.4 |
| On-line sales (Old High St.) | | 76% | 5% | 10% | 0% | 10% | 1.62 |
| On-line sales (Town Centre) | | 35% | 22% | 9% | 13% | 22% | 2.65 |
| **Use of customer data to target marketing** | | | | | | | |
| Customer data (Kirkley) | 2.26 | 57% | 12% | 21% | 5% | 5% | 1.88 |
| Customer data (Old High St.) | | 52% | 24% | 14% | 5% | 5% | 1.86 |
| Customer data (Town Centre) | | 36% | 16% | 8% | 16% | 24% | 2.76 |
| **Town centre Wi-Fi coverage** | | | | | | | |
| Wi-Fi (Kirkley) | 3.47 | 24% | 12% | 14% | 7% | 43% | 3.33 |
| Wi-Fi (Old High St) | | 30% | 4% | 9% | 22% | 35% | 3.26 |
| Wi-Fi (Town Centre) | | 25% | 0% | 13% | 13% | 50% | 3.63 |
| **Digital phone network coverage** | | | | | | | |
| Phone network (Kirkley) | 3.43 | 30% | 11% | 23% | 9% | 27% | 2.93 |
| Phone network (Old High St.) | | 22% | 9% | 13% | 22% | 35% | 3.39 |
| Phone network (Town Centre) | | 22% | 9% | 9% | 26% | 35% | 3.43 |
| **Fast broadband connection** | | | | | | | |
| Fast broadband (Kirkley) | 3.78 | 49% | 7% | 9% | 12% | 23% | 2.5 |
| Fast broadband (Old High St.) | | 52% | 9% | 4% | 13% | 22% | 2.43 |
| Fast broadband (Town Centre) | | 38% | 4% | 17% | 17% | 25% | 2.88 |

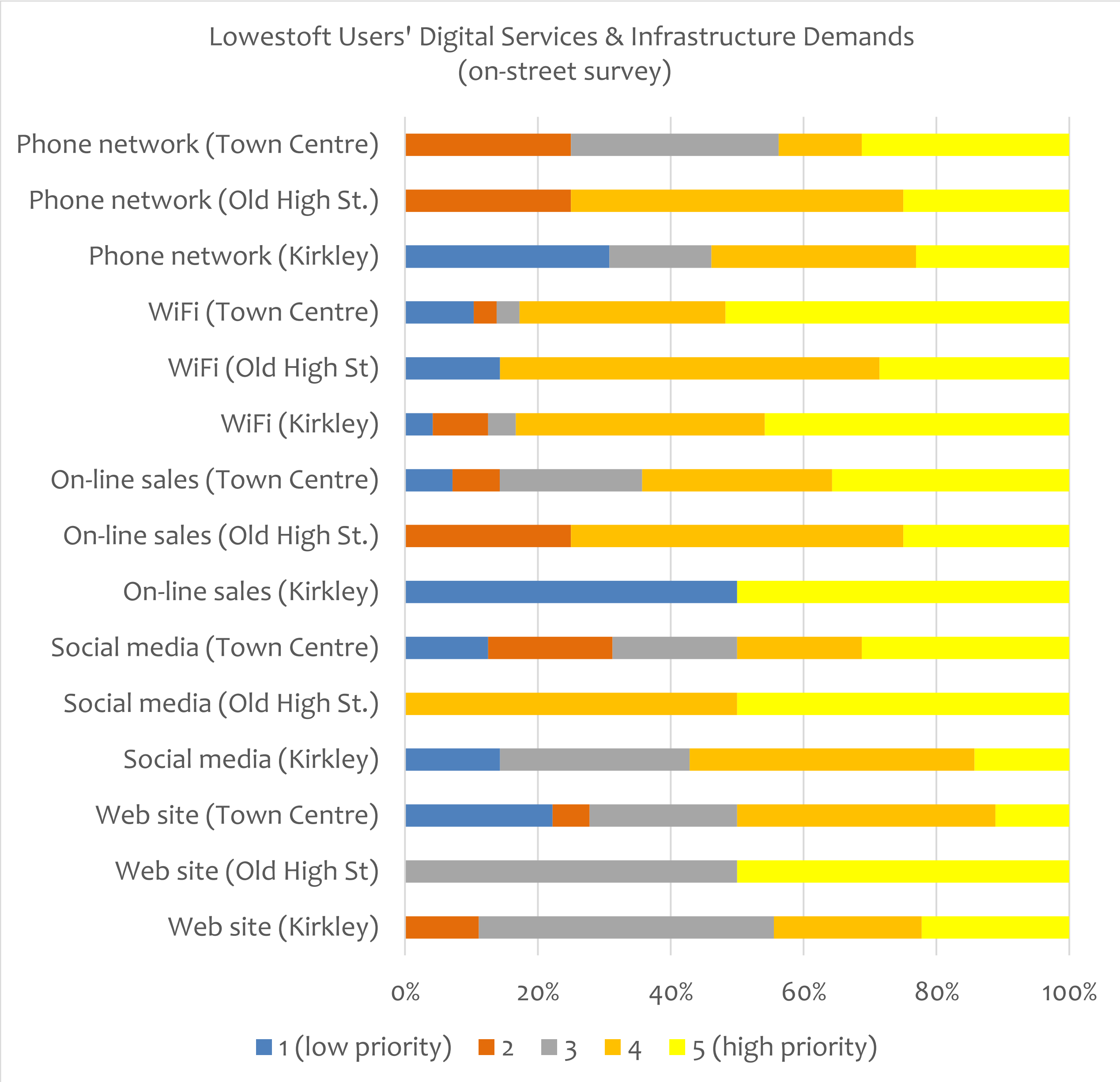

Lowestoft Businessses' Digital Skills Priorities
Customer data (Town Centre)
Customer data (Old High St.)
Customer data (Kirkley)
On-line sales (Town Centre)
On-line sales (Old High St.)
On-line sales (Kirkley)
Social media (Town Centre)
Social media (Old High St.)
Social media (Kirkley)
Web site (Town Centre)
Web site (Old High St)
Web site (Kirkley)
0%
20%
40%
60%
80%
100%
1 (low priority)
2
3
4
5 (high priority)


Lowestoft Businessses' Digital Infrastructure Priorities
Fast broadband (Town Centre)
Fast broadband (Old High St.)
Fast broadband (Kirkley)
Phone network (Town Centre)
Phone network (Old High St.)
Phone network (Kirkley)
WiFi (Town Centre)
WiFi (Old High St)
WiFi (Kirkley)
0%
20%
40%
60%
80%
100%
1 (low priority)
2
3
4
5 (high priority)

*Town centre users*

The tables and charts below give the corresponding priorities for all town centre users' surveys for use of businesses' digital services and convenience of town-wide digital infrastructure. The charts present the data separately for on-street and on-line respondents to see if there is any noticeable difference with one group self-selected as digitally aware.

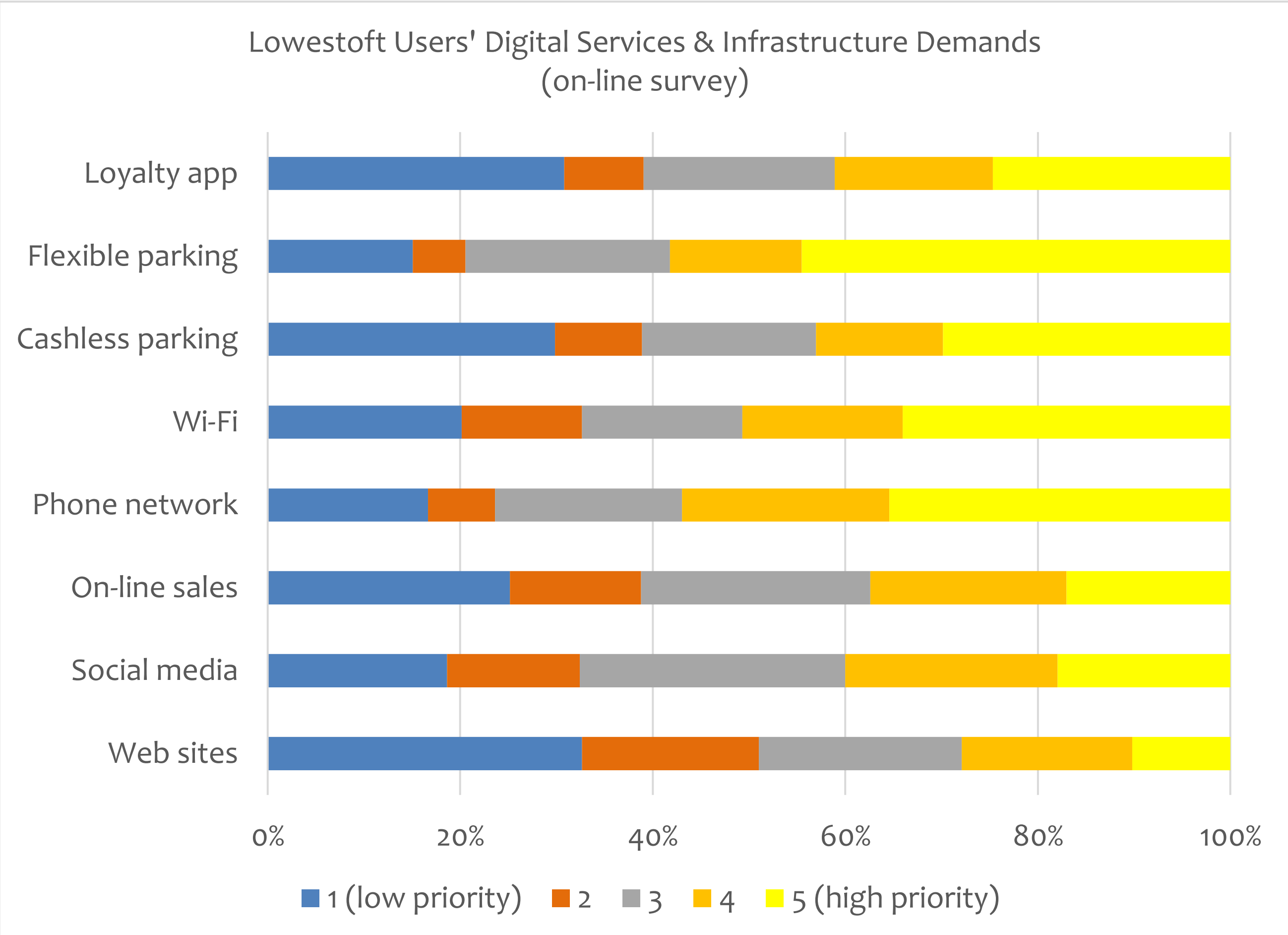
| **Users' digital priorities** | **East Suffolk average** | **1** | **2** | **3** | **4** | **5** | **L'stoft av'age** |
|---|---|---|---|---|---|---|---|
| **As part of your visit to the town, how useful do you find?** (1= low; 5= high priority) | | | | | | | |
| **Web sites about town/businesses** | | | | | | | |
| Web site (Kirkley) | 3.59 | 0% | 11% | 44% | 22% | 22% | 3.56 |
| Web site (Old High St) | | 0% | 0% | 50% | 0% | 50% | 4 |
| Web site (Town Centre) | | 22% | 6% | 22% | 39% | 11% | 3.11 |
| **Insights through social media** | | | | | | | |
| Social media (Kirkley) | 3.79 | 14% | 0% | 29% | 43% | 14% | 3.43 |
| Social media (Old High St.) | | 0% | 0% | 0% | 50% | 50% | 4.5 |
| Social media (Town Centre) | | 13% | 19% | 19% | 19% | 31% | 3.38 |
| **'Click and collect' or browsing** | | | | | | | |
| On-line sales (Kirkley) | 4.03 | 50% | 0% | 0% | 0% | 50% | 3 |
| On-line sales (Old High St.) | | 0% | 25% | 0% | 50% | 25% | 3.75 |
| On-line sales (Town Centre) | | 7% | 7% | 21% | 29% | 36% | 3.79 |
| **Digital phone network coverage** | | | | | | | |
| Wi-Fi (Kirkley) | 3.58 | 7% | 7% | 21% | 29% | 36% | 3.79 |
| Wi-Fi (Old High St) | | 4% | 8% | 4% | 38% | 46% | 4.13 |
| Wi-Fi (Town Centre) | | 14% | 0% | 0% | 57% | 29% | 3.86 |
| **Town centre Wi-Fi coverage** | | | | | | | |
| Phone network (Kirkley) | 4.05 | 10% | 3% | 3% | 31% | 52% | 4.1 |
| Phone network (Old High St.) | | 31% | 0% | 15% | 31% | 23% | 3.15 |
| Phone network (Town Centre) | | 0% | 25% | 0% | 50% | 25% | 3.75 |




Reviewing the opinions of on-street respondents for each of the areas, it seems that there is stronger demand from users for digital development than the priority currently afforded by businesses. Except for social media skills, customer demand is significantly higher than the priority given by businesses to development of digital services.

The on-street respondents give a significantly higher priority to the provision of digital services by businesses including the basics of web site provision which is considered a priority or high by 40% of town centre users. More advanced digital services such as online sales are considered a priority by 65% of town centre users and there is a high demand for social media insights (50%) that corresponds with businesses' priorities. The indication from this analysis is that regular on-street users with an older age profile have a higher demand for digital development than businesses anticipate. This would suggest that it is the in-town experience that is driving these customers to call for improved digital services.

| **Users' digital priorities** (online responses) | **1** | **2** | **3** | **4** | **5** | **L'stoft average** |
|---|---|---|---|---|---|---|
| **As part of your visit to the town, how useful do you find?** (1= low; 5= high priority) | | | | | | |
| **Web sites about town/businesses** | 33% | 18% | 21% | 18% | 10% | 2.54 |
| **Insights through social media** | 19% | 14% | 28% | 22% | 18% | 3.07 |
| **Click and collect' or browsing** | 25% | 14% | 24% | 20% | 17% | 2.9 |
| **Digital phone network coverage** | 17% | 7% | 19% | 22% | 35% | 3.52 |
| **Town centre Wi-Fi coverage** | 20% | 13% | 17% | 17% | 34% | 3.32 |
| **Cashless parking** | 30% | 9% | 18% | 13% | 30% | 3.04 |
| **Flexible parking** | 15% | 5% | 21% | 14% | 45% | 3.67 |
| **Loyalty app** | 31% | 8% | 20% | 16% | 25% | 2.96 |




The priority indicated by on-street respondents demonstrates that there is also a priority given to investment in town centre Wi-Fi and digital phone network coverage. Between 65% and 86%

of users indicated the importance of the digital phone network and 54% to 83% responded that town centre Wi-Fi coverage would be useful to them as part of their visit.

Online respondents despite being self-selected as digitally engaged and having a younger profile, placed less emphasis on the importance of developing digital services.  They gave their highest priorities to phone network coverage (57%) and the extra option of using technology to provide flexible parking solutions (59%).

# Local Leadership: *Creating a Forward Framework*

For a partnership to evolve in its effectiveness, it is important to plan for constant progress through regular review and writing things down! This can be achieved by annually reviewing the checklist and updating a 'Forward Framework' comprising an over-arching strategy and two component plans:

**Business Planning: Partnerships & People**

Revitalising a town centre is a complex and long-term venture and experience shows that it requires resources and leadership that should not be left to chance.

The form of an organisation refers to its set-up, structure, governance, partnerships and legal status. The form of a partnership should follow its function. Key determinants of this organisational form to consider include: the balance sought between being a consultative partner or can-do delivery body; available financial support and the need for independent fund raising; and close alignment with council policy verses the capacity to reach-out, engage with and empower sectors of the community.

There are many variations of the organisational models available for leading town centre revitalisation. Different options for organisational form include: council-led partnerships which coordinate activity and often inform policy; business-led town teams which can be very "can-do" and have a marketing focus; neighbourhood planning groups which can help shape future growth and its impact on town centre; development trusts which are very adept in managing community property; and BIDs which combine financial independence and business leadership. The appropriate organisational form is also likely to evolve over time and two organisations can work side-by-side with clearly defined roles.

An organisational business plan covering the foundations, form, folk and organisational finances will determine whether there is an effective and sustainable partnership able to deliver improvements. This organisational plan should define the inter-relationship and respective roles of partners such as the local authority, town council, business partners, Chamber of Commerce or a BID.

Overleaf is a summary of the advantages and disadvantages of different approaches to partnership development which has been taken from a case study of creating talented town teams prepared by the People & Places Partnership for the LGA.

| Advantages and Disadvantages of Different Approaches to Partnership Development | | |
|---|---|---|
| **Approach** | Advantages | Disadvantages |
| **Council-led partnership** | Close connection to other council departments; budget provided | Vulnerable to council budgetary pressures; can be difficult to fully engage with community & businesses |
| **Council-coordinated partnership** | Good connections to council departments; brings stakeholders together if clear purpose and/or delegated budget | Vulnerable to changing priorities; can create imbalance between action & strategic influence if role unclear |
| **Town centre manager & forum** | Partly arms-length though probable budget contribution from council | Vulnerable to cuts; important to get balance between strategic influence and engaging with business & community |
| **Town council hosted partnership** | Close local links; arms-length though conduit between authorities; modest budget need and ability to access some external funds | The 'can do' attitude can be stifled if too formal; can be difficult to fully engage with businesses without suitable sub-group of link to Chamber of Trade, for example |
| **Business-led town team** | Business-like approach & understanding of economic issues and collective marketing | No assured funding stream; can have narrow business focus & lack strategic influence |
| **Neighbourhood Plan group** | Considers wider economic and community planning; exerts long-term influence | Long-term and strategic process; can lack tangible, short-term impacts or town centre focus |
| **Development trust** | Capital asset base generates revenue income; strong community focus | Requires available property and large capital investment; can have narrow focus & lack strategic influence |
| **Business Improvement District** | Income stream from rates levy; strong business focus and contacts | Can have narrow business focus & lack strategic influence if not part of wider strategy alongside council |
| **Public-private partnership** | Combine council and commercial expertise and investment with strong development focus to deliver key sites | Likely to have a narrow, site-based focus and limited life though should sit within a wider strategy |

## Lowestoft town centre partners

In Lowestoft there is an existing and evolving network of partners that are already working together to contribute to local community and economic development.  These partners include:

- East Suffolk Council
- Lowestoft Heritage Action Zone,
- Lowestoft Town Council
- Lowestoft Vision
- Lowestoft Rising
- Kirkley Business Association

It will be important that a long-term and robust partnership is put in place that makes best use of the different organisations' capacities, skills, interests and community engagement.  This should involve ensuring that activity is coordinated across the different parts of Lowestoft with joint communication to partners, key stakeholders and the wider community.  The People & Places Partnership has specialist experience of evolving such partnerships and is available to provide ongoing advice and support as necessary.

## Action planning:  A Timetable for Change

A town centre action plan is necessary to determine and define objectives, projects, responsibilities, budgets, timescales, outcomes and impact measures as the building blocks of the coordinated delivery of improvements on the ground. The annual review of such an action plan should begin and end with a review of available evidence and the monitoring of impacts and changes.

The table overleaf provides a template for agreeing a town centre action plan for Lowestoft using the checklist of issues from the LGA Handbook on revitalising town centres and the evidence identified through the survey work.  The table can be used as a basis for developing a detailed delivery plan by partners with budgets, responsibilities, defined outcomes and measurable indicators of success.

# Agreeing an Action Plan

| Exemplar project/initiative | Outcomes/ indicators sought | Responsibility |
|---|---|---|
| **Parking, travel & access;** Is an integrated and customer-focused parking, travel, and access strategy in place? | | |
| *There is flexibility to shape a customer-focused parking & access strategy that better balances availability & convenience with negative perceptions & variable foot-flow across the town.*<br>In winter, at least, the indication is that Lowestoft is a moderately easy place to park with 50% of spaces available on a busy day. Nevertheless, businesses (53-62%) & customers (30%-56% ) have moderately negative perceptions about parking across Lowestoft. The top priority for businesses in all three areas of Lowestoft related to improving parking & it was also rated amongst the highest priorities for customers.<br>Convenience (84-90%) was considered positively by all on-street respondents while ease of walking around received a favourable response in the town centre & Kirkley (91% & 89%). The Local Plan recognises that there are continued opportunities for enhancing pedestrian connectivity & legibility between different parts of the town. | | |
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| **Planning & property:** Are there robust town-centre-first policies, master-planning, priorities within and between towns and has work been coordinated with town centre businesses and landlords? | | |
| *It will be important to manage ambitious planning strategy in a way that limits short-term disruption & provides a broader customer base with long-term complementary functions for different areas of Lowestoft.*<br>The policy review identifies ambitious & potentially transformative plans for Lowestoft. Regeneration in central & coastal Lowestoft seeks to deliver a significant amount of new housing, industry, retail & leisure development including 5,200 new homes & 38 hectares of new employment land. Specific key sites are identified within & around the town centre as part of this.<br>Businesses in the town centre & Kirkley have moderately negative perceptions about competition from out-of-town (57% & 43%). Town centre businesses are also negative about high local rents & rates (58%). | | |
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<table>
<tr><td colspan="3">Streetscape & public realm: Has a funding strategy and ongoing, prioritised streetscape and public realm improvement plan been agreed with an understanding of ‘connected value’?</td></tr>
<tr><td colspan="3">The attractiveness & appeal of the two peripheral areas need to continue to improve independently as plans to transform the structure & function of the town centre take shape.<br><br>Town centre footfall remains high though is under threat from closures, whilst foot-flow is very variable across the whole town with only 10% of these levels achieved in the Old High Street & Kirkley. Ongoing heritage & public realm enhancements in all three areas combined with adjacent developments, provide opportunities to boost footfall in each area & improve linkages.<br><br>Lowestoft scores highly for two of the three aspects of wellbeing relating to ‘place’. Cleanliness (59-70%) & physical appearance (36-59%) are perceived moderately positively by customers surveyed on-street.</td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td></td><td></td><td></td></tr>
<tr><td colspan="3">Business support: Is there tailored training/mentoring and a strategy to enhance the quality and distinctiveness of retail, services, hospitality and leisure businesses based on current provision, trends and knowledge of competing centres?</td></tr>
<tr><td colspan="3">There is a need to support & promote a distinctive & diverse mix of existing & new businesses in the three areas of town.<br><br>Enhancing the retail/business mix is a high priority amongst customers with high vacancy rates across the different areas of Lowestoft (17-22%). A continued decline in turnover is expected by high proportions of town centre & Old High Street businesses (44% & 35%), whilst 78% of Kirkley business expect turnover to stabilise or increase. High rents & rates are perceived negatively by 58% of town centre businesses. A relatively high percentage of town centre businesses are positive about local partnerships (39%) & marketing/promotions (39%) compared to the other parts of town.<br><br>The market is viewed negatively by town centre & Old High Street customers surveyed on-street (60% & 53%).</td></tr>
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|---|---|---|
| **Place branding & marketing:** Is there a clear understanding of the town brand with pooled budgets and a creative, collective marketing campaign? | | |
| *Responses about the different ways the parts of Lowestoft are perceived give helpful indications that can inform distinctive place-branding.*<br><br>There is a mixed balance between the perceived importance of local (61-67%) & visitor (48-75%) customers respectively with the town centre & Kirkley businesses giving more priority to the former. Town centre businesses modestly positive about existing local partnerships (39%) & marketing/promotions (39%).<br><br>In most survey responses it is very marked how on-line respondents have more negative perceptions than those surveyed on-street & how this indicates a need for tailored re-branding to attract these more infrequent town centre users. Whilst 52-79% of on-street respondents would recommend visiting the different parts of Lowestoft, only 21% of on-line respondents would.<br><br>There are differences in customers' perceptions of their changing experience between the different parts of Lowestoft that might also provide useful lessons. Whilst 50% & 60% of town centre & Old High Street users think their experience has worsened in recent years, 80% of Kirkley customers think their experience has stayed the same or improved. The image of the town expressed in a single word is very mixed with prominent responses ranging from mostly negative for the town centre, more balanced for the Old High Street & mostly positive for Kirkley. | | |
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|---|---|---|
| **Digital technology & data:** Is there an ongoing assessment of digital infrastructure and skills with an investment plan and approach for the collective use of data in marketing and monitoring the town centre? | | |
| *Businesses' priority for investment in digital infrastructure needs to be combined with services & skills development matching customers' needs.*<br><br>Businesses give higher levels of priority to town-wide investment in digital infrastructure with the highest priority given to Wi-Fi coverage with 50-63% treating this as a priority or high priority. Town centre businesses (61%) & Old High Street businesses (57%) would like to see investment in providing improved digital phone network coverage. The highest average score given by businesses for digital skills development, is given to the use of social media (44-57%).<br><br>Customers also give priority to investment in digital infrastructure with 65-86% of users indicating the importance of the digital phone network & 54-83% responding that improved town centre Wi-Fi coverage would improve their visit. There is a stronger customer demand for digital skills development than the priority currently afforded by businesses, including for advanced services such as on-line browsing. | | |
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