Foreword by
Kevin Vail, Chair of the Waveney Business Forum

The Waveney Business Forum (WBF) was set up to provide a collective and strong voice for the business communities of Waveney on a range of local and national issues.

Supported by the Economic Services team at Waveney District Council (WDC), the founding partner associations represent the market towns of Beccles, Bungay, Halesworth, Southwold and Lowestoft (including Kirkley), as well as the wider Waveney area through the Lowestoft and Waveney Chamber of Commerce and the Waveney and Great Yarmouth branch of the Federation of Small Businesses.

Following the media coverage of the Mary Portas High Street review and the recommendations she made to reverse the decline in Britain’s high streets, the business groups involved in the WBF were keen to understand the factors affecting the success and viability of their own town centres and how the Portas review could be implemented in their own localities.

The result of this is the Waveney Town Centre Study, which has at its heart the term ‘retail performance’, with the outcome to understand the factors important in the retail performance of the town centres and explore what changes could be made to increase consumer spend and footfall.

The study has been developed using the expertise of an experienced researcher and reflects the aspirations and thoughts of the business community and the local shoppers as consultation was a key part of the development process for the study. The main research method was a shopper survey to capture shopper perceptions and changing shopping patterns. However, businesses were also heavily involved in the project, and their views were captured in a number of business stakeholder meetings across the towns in Waveney, as well as in town-specific business stakeholder surveys.

The study complements the work already taking place within the Portas Pilot towns of Halesworth, Lowestoft and Southwold and creates a platform on which the WBF can work with the local authorities and partner organisations to formulate projects and initiatives.

What the study has shown is that there is not one overall solution or answer to helping our town centres, and that each of our towns has their own opportunities and threats which need to be carefully managed.

As Chair of the WBF, I believe that by working together we can influence partners and local business groups to ensure that a collective approach is taken to achieving economic prosperity for each of our localities. This study will be an important tool to assist in the development of action plans and funding bids to help take forward many of the ideas and recommendations explored in the study.
WAVENEY TOWN CENTRE STUDY

Digital Era Research Report Number: 2013-1

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This study is written in the context of a highly politicised backdrop from the popular or mass media about the function and longevity of high streets, town centres and local shops. Digital Era Research, an independent research organisation with previous experience of doing research with local business groups, was commissioned by Waveney Business Forum to carry out wide-ranging research on how to increase consumer spending and footfall in the high streets and town centres of Waveney. The main research method was a shopper survey across the whole of Waveney and beyond: in order to capture shopper perceptions and changing shopping patterns. However, businesses were also heavily involved in the project, and their views were captured in a number of business stakeholder meetings across the Waveney towns, as well as in town-specific business stakeholder surveys. The project centred on ‘Waveney’, Suffolk – as defined by the geographic area covered by Waveney District Council. It was recognised that the character of the towns in Waveney are very different – the collection of market towns in the form of Beccles, Bungay and Halesworth have very different issues to Lowestoft and its satellite settlements. The results show Waveney has particular strengths in its town environments and social and shopping experience, its independent shops and loyal core of regular local shoppers. The report also identifies Waveney’s shopping attractiveness in terms of providing quality and fresh items, and locally-produced goods. However, Waveney is identified as having a number of specific weaknesses around issues such as shopping variety and a lack of ‘professional’ town centre management. Particular car parking issues are also identified by Waveney shoppers as a weakness, which will form part of a wide-ranging car park review by Waveney District Council, and some parking policy changes in a positive direction have already been made since the data was collected for this study. The report identifies a number of opportunities for Waveney, particularly in relation to connecting bricks and mortar retailing with the online environment, as well as threats which may negatively impact on consumer spending in Waveney high streets and town centres in the future. The report additionally examines in detail what would make people shop in specific Waveney towns more often, what factors have put people off from shopping in particular town centres, and examines qualitative comments from shoppers on improvements they would like to see in every major town centre and high street of Waveney.
Executive Summary

Introduction

1. Digital Era Research, an independent research organisation with previous experience of doing research with local business groups, was commissioned by Waveney Business Forum to carry out wide-ranging research into how to increase consumer spend and footfall in the high streets and town centres of Waveney. The project became known as the ‘Waveney Town Centre Study’.

2. At the heart of the project was the term ‘retail performance’, and the major outcome desired was how to increase consumer spending and footfall in the Waveney towns by improving the ‘retail performance’ of Waveney. ‘Retail performance’ is a difficult aspect to measure. ‘Retail performance’ can be measured by asking respondents questions about their previous shopping behaviour. There are also ‘objective’ ways of measuring retail performance, such as ‘footfall’. Other studies of market towns have focused on a number of Key Performance Indicators (KPIs) for market towns to measure the performance of town centres. It was decided that the study should focus on the types of KPIs which most align with the aim of the study, which was how to increase consumer spend and footfall. This hinged mostly around shoppers and shopper perceptions. The main research method would be a shopper survey across the whole of Waveney and beyond: in order to capture Waveney shoppers who came from Waveney but also elsewhere. It would also be necessary to establish some footfall baselines which could be used to judge the retail performance of the Waveney towns in relation to each other as well as other towns in East Anglia or towns of similar size. However, businesses were also heavily involved in the project, and their views were captured in a number of business stakeholder meetings across the Waveney towns, as well as in town-specific business stakeholder surveys. The involvement of businesses helped ‘ground’ the shopper survey questions in the key issues that the businesses were aware of, as well as providing information of ‘business confidence’ about the economic performance of the towns.

3. The project centred on ‘Waveney’, Suffolk – as defined by the geographic area covered by Waveney District Council. The study reflects the geography of Waveney and its concentration of retail activities – in the urban areas of its major town, Lowestoft, and the major market towns of Beccles, Bungay and Halesworth. At the outset, the research was designed to include sample responses from all these towns. It was recognised that the character of the towns in Waveney are very different – the collection of market towns in the form of Beccles, Bungay and Halesworth have very different issues to Lowestoft and its satellite settlements. It was recognised that Lowestoft itself is not a unified settlement.

Methodology

1. The research was designed to have an iterative, multi-stage process where initial thoughts on a series of research questions were refined over time, leading to a ‘grounded’ shopper survey. The initial research idea (first stage) came from the Waveney business groups themselves, and the project steering group was composed mainly of members of the various Waveney town business groups. A second stage was data gathering in terms of anecdotal evidence from key ‘stakeholders’: particularly input from shopkeepers and those in the business community in the Waveney Market towns. A project presentation was made of the initial study aims and research questions to key business stakeholders in all the Waveney market towns, and an open discussion relating to the key issues around the retail performance of each town. This was followed up by the opportunity for businesses to complete an online survey which aimed to mirror many of the questions that would be in the shopper survey. The business stakeholder survey results were also fed back into the shopper survey design. The third stage of the research method involved putting forward the initial shopper survey design and questions, as generated from stages one and two, to the project steering group (composed of members of the local business community), for further review and refinement. Stage four of the research process is to feed back the results of the shopper survey and the wider results in this report to both the original business stakeholders and those engaged in Portas Pilot Town work. It is acknowledged that the results will also be distributed more widely to town and district councils in Waveney.

2. The shopper survey involved using a ‘volunteer sample’ of those who wanted to participate in the survey. The survey was not intended to be a representative sample, but a collection of the voices, experiences and perceptions of Waveney shoppers who wished to participate. Attempts were made to maximise the sample size, since data quality is improved with a larger sample, and recruitment was carried out in each Waveney
WAVENEY TOWN CENTRE STUDY

town. The shopper survey was deployed in both a paper (or ‘offline’) form and an online format. It was felt that an online only shopper survey would be deeply exclusive. The media was used to generate interest in both the offline and online survey, by publicising where to obtain a paper survey and also the web link to the online survey. In terms of ‘offline’ distribution of paper surveys, since the survey wished to recruit Waveney shoppers as its sample, Waveney shops were to be utilised as one major source of distribution.

The Political, Policy and Academic Context

This study is written in the context of a highly politicised backdrop from the popular or mass media about the function and longevity of high streets, town centres and local shops - which also reaches into academic writing and commercial research in terms of research priorities and the range of related aspects explored. In particular, this research study emerges into a debate about the future of our high streets, a well-tread path including commentators such as Portas. The Portas work, popularised by television coverage and backed by government funding to assist high streets in need of rejuvenation, sets out some of the key reasons for high street decline and the main battle lines between the key players in the fight for consumer retail spending. The Portas Review is a briefer rendering of a very comprehensive report by GENECON for the Department for Business, Innovation and Skills called ‘Understanding High Street Performance’. GENECON examined the key drivers and barriers which impact on both the economic and social performance of the high street, and developed a bespoke framework to explore the various types of factor which play a part in high street performance. This study examines the various factors impacting on the economic performance of high streets, based on the GENECON framework and material, but also brings in other literature to examine the importance of these factors nationally, and for towns and market towns similar to those in Waveney. It also suggests a series of solutions from the literature. The GENECON report identifies different kinds of high streets which have different functions – such as service centres or ‘local centres’ in high streets which serve a localised residential area in a suburban district, up to multi-dimensional town centres which have larger sub-regional markets and are driven by geography and their catchment (GENECON et al., 2011). There are also ‘destination’ town centres where the main driver for shopping there is a specialist appeal for a particular product or service, over and above functional roles.

Results of the Business Stakeholder Meetings and Surveys: Beccles, Bungay and Halesworth

The businesses showed a generally very pessimistic view of shopping levels in the various Waveney town centres compared to five years ago. Beccles was the most optimistic town in business confidence terms, but 63% of respondents still thought people were shopping in Beccles town centre less than they did five years ago. The business stakeholder meetings and surveys each raised issues specific to the individual towns, and it was clear from the business stakeholder material that each town had specific issues which often caused an inter-related set of problems. However, the businesses generally formed a consensus around the most important issues in their towns. When pushed into ranking a number of options, there was also a consensus around the most important factors they thought would make people shop in their town centres more often. In all the towns completing the business stakeholder surveys, there was a much greater percentage ranking ‘cheaper car parking’ as the most important factor in making people shop in their town centres more often, over other choices including car parking availability, more independent shops, promoting the town more widely and more events and markets. However, it was clear that the car parking dynamic was slightly different in each town, affected by issues such as the amount of free parking elsewhere in the town including at supermarkets and in on-street parking. Businesses also provided a useful commentary in relation to a range of other issues, such as differences in economic performance within the towns themselves, which car parks were busy or empty, the role of supermarkets in influencing shopping behaviour in their town and finally ‘supply-side’ issues from the business perspective which impacted on what shops survived in the town centres and the problems they had in terms of issues such as business rates or ‘red tape’. In terms of supply-side issues, they seemed most concerned about the economic downturn closing town businesses, as well as empty shops impacting on shopper satisfaction with the town centre environment.
Results of the Shopper Surveys

The Sample

The total sample size of the dataset after data cleaning was 644: including 618 fully completed responses, and 26 incomplete responses which met the inclusion criteria. 256 out of 644 surveys were completed on paper, indicating 40% of responses were in paper form and 60% in online form. Survey respondents were asked to classify where they live. 23% said they lived in Lowestoft or Greater Lowestoft, reflecting the greater concentration of Waveney’s population in that area. 19% came from Halesworth, the next biggest proportion and 16% came from Beccles. Rural Suffolk was well-represented with an equal number to Beccles, or 16%, coming from a village in Suffolk. 14% came from Bungay. The highest proportion of respondents were in the 60-69 category (27%), with the next highest percentage aged 50-59 (23%). 21% were over 70. In total 71% of respondents were in the age bracket of 50-70+. Those aged 60-69 were over-represented by more than 10%, those aged 50-59 were also over-represented by more than 10% and those aged 70+ were over-represented by nearly 4%. Only 6% of the sample were 20-29, and 7% 30-39, with less than 1% aged 16-19. If we compare this to Waveney’s age breakdown in 2011 then those aged 16-29, 20-29 and 30-39 were under-represented. The over-representation of older people and those aged 70+ in the sample should be seen as a positive aspect of the survey, as the impact of changes to town centres may fall disproportionately on them, and so their views are particularly relevant. 72% of respondents said they were female, while only 27% were male. This much higher proportion of female respondents may reflect the fact that shopping decisions and activities often reside with females in the household.

Shopping in Waveney as a Geographic Area

1. Shopping Frequency in Waveney

Surprisingly, the majority of respondents said they shop in Waveney area town shops daily, at 47% of respondents. The survey sample therefore includes 47% of people who have a great deal of regular experience of using Waveney town shops. 45% said they used them weekly, with much smaller proportions using Waveney shops with less frequency.

2. Waveney Town Centres People Have Stopped Shopping In or are Shopping In Much Less Frequently

40% of respondents said they had not stopped shopping in any of the Waveney towns or were shopping there much less frequently, which is an encouraging result in terms of potential footfall and economic performance. However, 36% of respondents noted that they were shopping in Lowestoft Town Centre less frequently or had stopped shopping there. 21% said they were shopping in Bungay less frequently or had stopped shopping there. From the sample, Lowestoft Town Centre and Bungay appeared to have seen the greatest fall in footfall and consumer spending of all the Waveney towns. The survey presents a detailed thematic qualitative analysis of the reasons people gave for shopping in a particular Waveney town less frequently, or having stopped shopping there. The survey identified a variety of aspects which could potentially be improved, including detailed material for Lowestoft which could be used in conjunction with their Portas Pilot town funding.

3. The Waveney Towns People or Households Shop in Most Often

29% of respondents said they shopped in Beccles most often, followed by Halesworth at 27%. 18% shopped in Lowestoft Town Centre most often, followed by Bungay at 16%. 5% shopped in Greater Lowestoft most often (Carlton Colville, Pakefield, Oulton Broad), followed by 3% in Kirkley and 2% in Southwold.

4. How Often People Shop in Waveney Town Centres (excluding supermarkets)

Halesworth has the highest percentage of daily shoppers in our sample, at 12% of respondents. Beccles follows next at 10% of respondents, and then Bungay at 9%. Lowestoft Town Centre is at 6%, and the other towns and shopping areas have very small percentages of daily shoppers. Beccles has by far the greatest number of weekly shoppers, at 24% of the sample, while Halesworth is next at 15%, Lowestoft Town Centre with 13% and Bungay and Greater Lowestoft both with 10%. It appears that the different towns and shopping areas have different shopping patterns, perhaps driven by different types of shopping.

5. Why People Shop in the Waveney Town Centres They Regularly Shop in

As an overview, it is apparent from the ‘strongly agree’ responses that a high percentage of our sample shop in Waveney because they live in the town in which they regularly shop (43%), because they live locally (outside
the town but within 30 minutes driving distance) (30%), and because they don’t want to travel far (38%). This suggests the high streets have a large importance in being ‘local centres’. However, the ‘shopping offering’ is also important, and 30% say they strongly agree that wanting quality or fresh items is why they shop in Waveney towns, while 28% say the same of locally-produced goods. Fewer respondents strongly agree that they shop in Waveney because they want specialist or unique items (17%). Waveney town centres/ high streets appear to be on a spectrum of local centres and destination centres, with a strong emphasis on being local centres. The most striking result is that people generally seem to enjoy both the town environments offered by Waveney towns and the social or shopping experience they are having there. 30% of survey respondents said they strongly agree that the town environment was why they shop in the Waveney town centres they regularly shop in, while 26% said they strongly agree that enjoying the social or shopping experience was why they shop in Waveney. This vitally suggests that from our sample at least, Waveney as an area generally benefits from having good town environments, and enjoyable social and shopping experiences. At the other end of the scale, various forms of promotion such as a website or other advertising material either have no influence over the Waveney towns the survey respondents regularly shop in, or people haven’t seen such advertising. The research in this section suggests factors that are already key attractors for Waveney shoppers, which allow for further advertising campaigns which are grounded in the positive aspects of Waveney that already keep people shopping in Waveney, which could be aimed at new Waveney shoppers.

6. Changes in shopping behaviour in relation to Waveney town centres

The highest percentage of respondents, 45%, said they were shopping in Waveney town centres (excluding supermarkets) at the same level as five years ago. The next highest percentage, 28%, said they were shopping there more than five years ago. 20% said they were shopping in Waveney town centres less than five years ago, and 6% said they’d only just started shopping in Waveney. The result suggests that amongst the survey population there is a large core of shoppers shopping at consistent levels over time.

(a) Those Shopping in Waveney More

It is evident that some of the positive changes towards more Waveney town centre shopping may be down to changes in personal circumstances, which has the highest percentage as a very important factor at 37%. This could include moving to the area, retirement or other life changes. Various aspects relating to travel come in next, with 27% saying petrol/ diesel price increases are very important in shopping in Waveney more and 25% saying they are travelling less to regional centres. Using supermarkets for free parking is also noted as very important by 26% of those shopping in Waveney towns more. This may suggest that additional free parking could encourage more Waveney shoppers. When looking at ‘important’ and ‘very important’ factors together, ‘better town environment’ comes out strongly from the results, as it does in the question on why people shop in the Waveney towns they regularly shop in. 54% rate it as very important or important in why they are shopping in Waveney town centres more over the past five years.

(b) Those Shopping in Waveney Less

The most important factors leading respondents to shop in Waveney town centres less often over the past five years are, firstly, car parking issues, with 36% of respondents saying this was very important. The next highest level of responses for a factor judged very important was the ‘loss of certain shops’, with 33% of respondents judging this very important. 29% said a ‘poor town environment’ was very important in them shopping in Waveney less. At first this may seem contradictory, given the positive responses previously given about town environment in the section above on those shopping in Waveney more. However, it is necessary to remember that the positive feelings about town environment are not universal across the whole of Waveney, and some town environments or areas may have deteriorated in the view of respondents (particularly judging from comments on Lowestoft). Internet shopping is stated as very important by 26% of respondents shopping in Waveney less, equal with the 26% identifying petrol/ diesel price increases as very important in shopping in Waveney less.
Town Centre Competitors: Supermarkets and Internet Shopping

Supermarkets: Waveney Level Results

1. Where People Shop for the Majority of their Food/Grocery Shopping

Town centre shops are used by only 11% of the survey sample across Waveney for the majority of their food/grocery shopping. Supermarkets account for at least 81% of our sample’s main shopping. In terms of the most significant supermarkets, Halesworth Rainbow (Co-op) and Beccles Tesco are each used by 16% of the survey respondents, as the particular stores with the highest percentage of respondents using them. However, Halesworth Rainbow as a main shopping destination is to a degree over-represented, since we know from the analysis of the sample that Halesworth residents are over-represented.

2. The Influence of Supermarkets on Shopping Behaviour

The survey investigated a range of issues associated with shopping in supermarkets. This included whether people park at the supermarket, do some shopping there and also visit the town centre shops (cross-over shopping), or whether most of the time they get what they want from the supermarket and then go home. The survey was also interested to find out if free supermarket car parking influenced where people park in town centres, and also if they were prepared to walk a long or a short distance from that car park to other town centre shops. How far people were prepared to walk showed the potential for supermarkets to ‘distort’ shopping patterns - if people were strongly influenced by supermarket free parking and not prepared to walk far. 46% of the respondents frequently shop at the supermarket of their choice and then go home and 26% do this occasionally. This suggests that for nearly half of the respondents, that there may be a limited amount of cross-over into using town centre shops. 27% of respondents say they are frequently using the supermarket as a base to visit surrounding town centre shops, while 18% do this occasionally. As to whether people are prepared to walk a short distance or a long distance from their supermarket car parking ‘base’, 11% frequently walk short distances to town centre shops and 10% say they frequently walk a long way – little difference. However, when we look at occasional behaviour, 27% occasionally walk a short distance to other town centre shops while only 17% occasionally walk a long distance. 52% said they never walk a long distance to town centre shops from a supermarket car park. This suggests that there may be a shopping ‘distortion’ from people using supermarkets as a free parking base amongst those who shop in town centre shops occasionally when parking at the supermarket – as the occasional shoppers seem more reluctant to walk long distances. The survey questions also asked if free or reduced price supermarket parking strongly influenced where people park in their chosen shopping town. 39% said it frequently did, and 15% said it occasionally did – suggesting more than half were influenced in their parking behaviour by free of reduced price supermarket shopping.

Particular concerns were noted by participants during the Beccles business stakeholder meeting and survey about the role of Beccles Tesco in shaping the shopping patterns in Beccles, because it offered free parking and the car park was in a location close to the town centre. One reading of the data may be that the Beccles Blyburgate area or other areas more distant to Beccles Tesco may be losing out on those shoppers who occasionally visit town centre shops when they park at Beccles Tesco – there is an 8% difference between those visiting shops within a short walking distance, and those a long way from the Tesco free parking. There is also a higher percentage who never walk a long distance to town centre shops from the supermarket base than those never walking to shops within a short distance (36% versus 28%).

Internet Shopping: Waveney Level Results

The survey respondents were asked if they buy things on the Internet. The majority, 72%, said that they did, whilst 28% noted that they didn’t. This result was higher than expected, given the age profile of the survey respondents. As the survey was offered in a paper as well as an online version, the high Internet shopping rate was not driven by the fact that this was an Internet only survey. In contrast, a 2011 town centre study carried out for Transport for London showed 47% of their sample shopping by Internet, which suggests a comparatively high rate of Internet shopping in our sample.

The most popular items bought online amongst our sample are stationery, books, CDs, DVDs, music and film downloads, at 52% of respondents who shopped on the Internet. This is in line with the Transport for London survey, which also found books/CDs/DVDs/leisure goods as the most popular items to buy online. Town centre shops may sell some of these items – in particular books and stationery. There is therefore potentially a substitution effect away from physical shops towards Internet purchasing in relation to these items. The next
most popular item to buy online are ‘gifts’, with 47% of survey respondents who shopped on the Internet buying these. ‘Gifts’ is a broad category, which is partly why the percentage is so large. However, ‘gifts’ tend to be certain kinds of items and often bought for special occasions, so the category is an important one to consider in the ‘shopping offering’. There are quite a number of gift shops within the Waveney towns and there may be substitution effects away from buying gifts in physical shops towards buying on the Internet. 47% are also buying clothing or items to wear online, again in line with the Transport for London survey which found this as the second highest category bought online. There may be substitution effects away from local physical shops in clothes purchasing, or people may be purchasing brands and types of clothing and footwear that they cannot buy locally.

In order to assess why people are buying online, rather than in physical shops or their local high street, people were asked to rate a number of factors in terms of importance. ‘Convenience’ is rated as ‘very important’ by 47% followed by ‘saves time’ at 43%. This suggests that town centre shopping may be much more impractical for some people as it is less easy to do and more time consuming. 41% also say a very important factor why they bought online was that it was cheaper, and equally 41% said the items they wanted to buy were unavailable in the town centre. This suggests that Waveney town centres are finding it hard to compete with both cheaper online prices and the range of goods offered online. Another factor for buying online was saving travel or parking costs, and 36% said this was ‘very important’, and 21% that it was ‘important’. The survey results suggest that it may be difficult for town centre shops to compete with the ‘shopping offering’ provided by the Internet – where the benefits seem to hinge on convenience, time saving, cheapness, finding items unavailable in the town and saving costs on travel or parking.

Car Parking: Waveney Level Results

Survey respondents were asked at a Waveney level about car parking factors which would make them shop in Waveney town centres more often. Concentrating initially on the very important factors, it is evident that some form of free parking is rated very highly in terms of the range of car parking factors that survey respondents say would make them shop in Waveney towns more often. The highest percentage for any factor judged very important is for ‘free 2 hour parking’ at 44% of responses. This is favoured over ‘free 1 hour parking’, which is judged ‘very important’ by 39% of respondents - as one hour may not be perceived as enough time for people to complete their shopping tasks. The second most important factor which is judged as ‘very important’, is some free parking at certain times of year (e.g. for Christmas fairs, events). 42% of survey respondents judged this very important in making them shop in Waveney town centres more often. Other factors appear ‘very important’ to a lower percentage of respondents, with cheaper long term car parking coming in next at 33% and reduced rate parking for shopping in town centre shops (a parking refund scheme) coming in at 29%. The responses to this survey question should be seen in terms of their significance. The survey responses suggest that nearly half of our respondents would shop in Waveney town centres more if there were 2 hours of free parking. The survey is not a representative sample of Waveney shoppers, or the closest proxy we have - which is the population of Waveney. However, our sample does represent a core of older and frequent Waveney shoppers, and this is clearly an issue important to this group. If the respondents have answered in terms of accurately predicting their behaviour with more free car parking, then there appear to potentially be ‘footfall’ and poundfall gains for Waveney town centres in terms of offering more free parking. It is acknowledged that there have been a variety of positive changes to car park policy in Waveney in late 2012 and 2013, after the Waveney Shopper Survey closed, which the survey would have been unable to capture. These changes include a one hour free parking trial in Bungay and Halesworth.
**Town Specific Results**

**Beccles**

1. **Car Parking: Views on Parking in Beccles Town Centre**
   18% strongly disagree and 31% disagree (a total of 49% in general disagreement) that it is always possible to find a parking space in the town centre. Car parking availability seems to be a bigger source of dissatisfaction in Beccles than car parking pricing. 11% strongly disagreed that the charges for parking in Beccles are less costly than many other towns, while 25% disagreed, giving a general disagreement with the statement of 36%. Car park pricing is likely to be less important than price in Beccles, due to the availability of a large free (for three hours) car park close to the town centre.

2. **Factors Which Put People Off From Shopping in Beccles Town Centre Shops**
   The highest percentage of respondents strongly agree that they have been put off from shopping in Beccles by the price of car parking, at 11% of Beccles shoppers. 31% generally agree that they have been put off from shopping in Beccles due to the price of car parking (11% strongly agree, 20% agree). The lack of availability of car parking spaces is agreed to have put Beccles shoppers off from shopping in Beccles by 9% who strongly agree and 28% who agree, giving a total of 37% in general agreement.

3. **Reasons for Visiting Beccles Town Centre: Key Attractors**
   58% of the Beccles sample are visiting Beccles town centre to shop twice a week or more often. This shopping will include supermarket shopping, but it is clear that there is shopping beyond the supermarket, as a comparative 37% are shopping at the supermarket in Beccles twice a week or more often. 30% of the sample shop in Beccles once a week, and 41% shop at the supermarket once a week. There are other regular reasons why people are visiting Beccles, and 15% of the sample visit Beccles for work twice a week or more often. Other reasons bring a smaller percentage of Beccles shoppers in regularly. Eating at cafés or restaurants is done twice a week by 9% of the sample, but 19% do it weekly. Banking is similarly done twice a week by 9% and 22% do it weekly. These activities appear to predominantly be a weekly activity amongst the sample. Visiting the weekly market is also a key attractor into Beccles for our sample. 21% say they shop there weekly and 16% say they shop there every two weeks. 19% are shopping in Beccles every three months as part of special events such as street markets or festivals, and 17% every six months. 23% of the sample do this once a year.

4. **Shopping Offering, Geography and Reasons to Shop: Beccles Sample**
   54% of the Beccles sample agreed or strongly agreed that they shop in the Waveney town centres that they regularly shop in because they live in the town where they regularly shop, and 64% agreed or strongly agree it is because they live locally to the town. 57% of the Beccles sample agreed or strongly agreed that they want locally-produced goods, but a higher percentage, 74%, agreed or strongly agreed that they want quality/fresh items. 44% strongly agree that they shop in the Waveney town centres that they regularly shop in for specialist/unique items. 66% say they strongly agree that they shop in the Waveney town centres that they regularly shop in because they can buy ethical or ‘green’ items. 78% agreed or strongly agreed that they don’t want to travel far. This all implies that Beccles may have a strong role as a ‘local centre’ within Waveney, but that specialist items associated with ‘destination centres’ are also important. High percentages of the Beccles sample say they agreed or strongly agreed that they shop in the Waveney town centres that they regularly shop in because of the town environment (75%) and because of the shopping experience (66%). However, the role of websites and advertising in this sample is extremely insignificant. The figures would suggest Beccles is both a local and destination centre in GENECON (2011) terms, with a strong amount of specialist shopping.
5. **Changes in Shopping Behaviour in Beccles Over Five Years**

Only 8% said they were shopping in Beccles town centre less than five years ago, with the majority saying they were shopping at the same amount as five years ago. 40% said they were shopping in Beccles town centre more than five years ago. The question was careful to exclude supermarkets in order to better judge what was happening to town centre shops. The results are perhaps quite surprising in relation to a national back drop of town centre decline. However, from our sample of Beccles shoppers, visits to Beccles town centre shops appear buoyant, despite the economic downturn, although geographic differences within Beccles are acknowledged in terms of economic performance.

**If Shopping in Beccles Less Than Five Years Ago, Where Do You Shop Instead?**

Of those shopping in Beccles less, Internet shopping is shown to be the option that most of the respondents note, with 60% saying they are shopping on the Internet instead of shopping in Beccles town centre. 47% are shopping in a supermarket rather than Beccles town centre, and 40% are shopping in another town centre. 20% said they are not shopping anywhere else.

6. **Factors That Would Make Those Shopping in Beccles Most Often Shop in the Town Centre More Often**

The factor achieving the highest percentage of ‘very important’ responses was ‘cheaper car parking’, at 36% of responses. This result was surprisingly followed by ‘more town facilities’ at 33% (the examples given in the survey were leisure facilities and better toilet facilities). 30% rated better availability of car parking spaces as very important, and we have already seen the availability of car parking spaces as a major issue in Beccles in the car parking section above. Surprising, 30% thought more independent shops was very important in getting them to shop in Beccles town centre more often, and this is rated as ‘very important’ by nearly four times as many respondents than those who thought more big brand high street names might bring them to Beccles more often. Beccles is therefore valued in terms of its independent traders, and the supposition from the survey is that more independent traders may bring in more business.

7. **Poundfall in Beccles**

27% are spending £50 or more on shopping when visiting the town centre to shop. The next highest percentage, at 23%, are spending £20-£30 on shopping. The highest earning activity for Beccles is shopping, and nearly a third of respondents are spending more than £50 when they visit Beccles to shop. In terms of eating and drinking, 26% are spending £5-£10 - the most typical value of spending for eating and drinking, and 21% spend £10-£20. Entertainment and leisure spending in the town centre is comparatively low, with 48% of the sample typically spending no money on that on a typical visit to Beccles. However, 15% say they spend £10-£20, which is the spend those spending any money of this category typically make.

8. **Range of Goods and Services Bought in Beccles Town Centre: Those Who Shop in Beccles Most Often**

The results from the subset of shoppers who shop in Beccles most frequently reveal the highest percentage are shopping in Beccles town centre for food or groceries, at 98%. Due to the location of Beccles Tesco in the town centre, the results will include food and grocery purchasing from them. The next highest percentage is pharmaceuticals or toiletries at 85%. A high proportion of the sample are using ‘services’ like the hairdresser, banks, and the Post Office which are not offered in the supermarket. Clothing or items to wear are also popular at 75%, and gifts at 69%. Household items are also frequently purchased at 68% of the sample, and eating in a café or restaurant is done by 66% of respondents. If we compare this to the range of items bought online, Internet competition may be strongest in stationary/ books/ music/ films, clothing, gifts and household items; and given the popularity of these goods in Internet purchasing and the town centre, there could easily be substitution effects towards the Internet if the shopping experience there and price is better.

9. **Improvements People Would Like to See to Beccles Town Centre Which Would Make Them Shop There More Often: Qualitative Comments**

In Beccles, the key factors for improvement that people said would make them shop there more often centred largely around improving the visual appearance in relation to the King’s Head Hotel, which was awaiting refurbishment at the time of the study. Improving the shopping variety was also seen as key in this
open question, and people tended to identify many types of shops they would like to see in Beccles – they
are perhaps shopping in other towns with these type of shops at present. Finally, cheaper or free car parking
is also seen as critical to more shopping in Beccles, and this is often related to Tesco’s three hours of free
parking – people would like to be able to park where they want elsewhere and not have to rush their
shopping trip.

Bungay

1. Car Parking: Views on Parking in Bungay Town Centre
   23% strongly disagree that Bungay’s charges for car parking are less costly than for many other towns, with
   24% answering ‘disagree’. This gives 47% in general disagreement that Bungay’s car parking charges are less
costly than many other towns. Parking availability also appears to be a problem in Bungay, with 22% strongly
disagreeing that it is always possible to find a car parking space in the town centre. 26% also ‘disagree’ with
this, giving a general disagreement of 48% with this statement.

2. Factors Which Put People Off From Shopping in Bungay Town Centre Shops
   The greatest number of respondents, 11%, strongly agree that traffic problems have put them off shopping in
Bungay town centre shops (amongst those shopping in Bungay most frequently). We are unable to infer more
about the ‘traffic problems’ that are causing dissatisfaction with Bungay – it could be the old traffic system
with heavy traffic along St Mary’s street, the new system, or even press coverage of the change of system (or
all three). 22% of those shopping in Bungay most frequently also ‘agree’ that traffic problems have put them
off shopping in the town centre, giving a general level of ‘agreement’ at 33%. Looking at other factors, 9%
strongly agree they have been put off shopping in Bungay town centre by the price of car parking, while 26%
‘agree’, giving a ‘general agreement’ of 35% - slightly higher than traffic problems. 8% strongly agree that a
lack of standardised opening times of shops or shops being closed has put them off shopping in Bungay, while
17% agree – giving a ‘general agreement’ of 25%. The availability of car parking also seems to be a problem in
Bungay, with 6% of the sample strongly agreeing that they have been put off from shopping in Bungay by the
lack of availability of car parking spaces, but a large 22% ‘agreeing’ that they have. This gives a ‘general
agreement’ by 28% of the sample that they have been put off shopping in Bungay by the lack of availability
of car parking spaces.

3. Reasons for Visiting Bungay Town Centre: Key Attractors
   64% of respondents say they are coming in twice a week or more often to shop in Bungay, which is higher
than the rate found in Beccles by 10%. This suggests very regular shopping by the majority of the sample. In
Beccles, the key attractor for visiting the town centre was the supermarket (37% shopping there twice a week
or more often). However, in Bungay, those shopping in the supermarket twice a week or more often amount
to only 11%. The fact that supermarket shopping is a comparatively low percentage in Bungay suggests that
‘other shopping’ is happening in the town centre regularly instead. Banking seems to be a key attractor in
Bungay, with 26% coming in twice a week or more often to do banking. This may suggest that Bungay may be
very vulnerable if any further banks decide to leave its town centre. A further 26% of the sample are using the
banks weekly, which again at over quarter of respondents is a substantial number. 31% are visiting the
market weekly, which again seems a significant attractor amongst our sample, and 17% weekly and 7% more
frequently than that to eat at café’s or restaurants.

4. Shopping Offering, Geography and Reasons to Shop: Bungay Sample
   71% agreed or strongly agreed that they shop in the Waveney town centres they regularly shop in because
they live in the town in which they shop, while 58% agree or strongly agree it is because they live locally
(outside the town but within 30 minutes driving distance). This shopping in the town where they live figure is
much higher than in Beccles, and definitely suggests Bungay may be more of a ‘local centre’ than Beccles in the
GENECON classification of high streets. 73% agreed or strongly agreed that they shop in the Waveney
town centres they regularly shop in because they want locally-produced goods, and 79% because they want quality/fresh goods. A much higher percentage of the Bungay sample seems to want locally-produced goods than the Beccles sample, and a slightly higher percentage want quality/fresh items. This tends to suggest Bungay’s shopping attractions are different from those of Beccles, with a definite concentration towards local goods. 49% of the Bungay sample shop in the town centres they regularly shop in because they want specialist or unique items, which is higher than in Beccles – and suggests Bungay is also a ‘destination centre’ in the GENECON classification. A very high percentage of the Bungay sample shop in the town centres they regularly shop in because of the town environment (69% agree or strongly agree), and a high percentage because they enjoy the social or shopping experience (60% agree or strongly agree). 46% agree or strongly agree that they shop in the town centres they regularly shop in because they can buy ethical or ‘green’ items there. These percentages are lower than in Beccles, tentatively suggesting the town environment, social and shopping experience and ethical or ‘green’ items are less of a draw for our Bungay sample.

5. Changes in Shopping Behaviour in Bungay Town Centre Over Five Years

The majority, 38%, said they were shopping in Bungay town centre (excluding supermarkets) at the same amount as they did five years ago. Surprisingly, 34% said they were shopping in Bungay more than five years ago. 18% said they were shopping there less than five years ago. As a caveat, it may be that our sample of Bungay shoppers is more constant in its shopping in the town than the whole population of Bungay shoppers, because these are a sample of shoppers shopping in Bungay more frequently than the other Waveney towns. It has also been evident that our sample shop in Bungay town centre very regularly, and it may be more infrequent Bungay shoppers that have been lost to shopping elsewhere.

If Shopping in Bungay Town Centre Less Than Five Years Ago, Where Do You Shop Instead?

The survey responses revealed that 63% of those shopping in Bungay town centre less than five years ago were shopping in another town centre instead, and 58% were shopping in a supermarket. 47% said they were shopping on the Internet rather than shopping in Bungay, and 31% doing out of town shopping.

6. Factors That Would Make Those Shopping in Bungay Most Often Shop in the Town Centre More Often

The factor rated as ‘very important’ by the greatest percentage of respondents is ‘better traffic management’, at 41% of respondents. This had also proven to be the most notable factor in a previous question. Again, it is not possible to say whether these comments are about Bungay’s traffic problems before the one way system, after the one way system or due to publicity about the one way system. What we can say is that the respondents sampled wanted some form of improved traffic management for Bungay. The next most important factor cited by the greatest percentage of respondents was ‘cheaper car parking’ where 37% said this was very important in making them shop in the town centre more often. This is followed by ‘more independent shops’ at 35%.

7. Poundfall in Bungay

The contrast with Beccles is quite striking, in that higher levels of spending are mostly missing from the chart (27% of the Beccles sample were spending £50+ on shopping). The greatest percentage of respondents are spending £10-£20 on shopping on each trip. The amount spent on ‘shopping’ is a little higher than the other categories, but not substantially so. An equal percentage are spending £5-£10 and £10-£20 on eating and drinking each time they visit (23%). Entertainment and leisure spending also seems higher amongst our sample of Bungay shoppers than in our Beccles sample. The chart implies that Bungay’s poundfall may be lower than that of Beccles in terms of ‘big spending’, but this may be offset by more frequent shopping. Another issue is that supermarket shopping is less of a component of Bungay shopping, and that this may mean higher levels of spending per trip are more absent than in Beccles.

8. Range of Things People are Shopping For or Services They are Using When They Go to Bungay

The highest percentage of respondents are shopping in Bungay for food or groceries, as in Beccles, at 94%. The next highest percentage are using Bungay’s services, such as banks, the Post office or hairdressers (83%). Pharmaceuticals and toiletries are also popular in Bungay, as in Beccles, with 78% of the sample buying them. Gifts are also popular with 67% of repondents in the sample buying them, with confectionary, tobacco and
newspapers next at 66%. These are very much in line with the Beccles sample. However, the main disparities between Bungay and Beccles are in clothing, where only 41% of the Bungay sample are buying clothing in Bungay, and 75% of the Beccles sample are buying clothing in Beccles. Bungay perhaps has less potential threat from Internet shopping, as the main categories bought online are not bought by a high percentage of people in Bungay at the moment (probably because of the absence of these types of shops). This includes clothing or items to wear and stationery/ books/ DVDs etc. However, the high percentage buying gifts may be vulnerable to switching to Internet purchasing.

9. Improvements People Would Like to See to Bungay Town Centre Which Would Make Them Shop There More Often: Qualitative Comments

‘Traffic’ is a very dominant theme in the Bungay comments. People would like to see improvements in traffic management, which would make them shop in the town more often. There is a strong feeling that lorries and HGVs should be kept out of Bungay, and comments around the danger of traffic in Bungay town centre. There is a feeling amongst most commentators that the traffic volume is too high. However, there are very mixed feelings about the current one way system ‘experiment’, with comments representing the views from both sides of the debate. It is clear that ‘traffic issues’ are putting people off from shopping in Bungay, and it is perhaps unwise to inflame further negative thoughts about Bungay’s traffic. Car parking is a topic of major importance in the open comments, as in Beccles, but the debate in Bungay is slightly different. Having cheap or free car parking is something that is very high in its frequency of comments to get people to visit Bungay town centre more often. However, there is also a second element to the car parking issue in Bungay. Car parking enforcement also has a very high comment frequency, and is seen to be linked to Bungay’s traffic problems – with illegally parked cars holding up the traffic flow. Shopping variety is also an issue in Bungay, as in Beccles, in terms of factors which would make people shop in Bungay more often. There are various comments about the type of shops people would like to see in Bungay. There are also some comments from people about having more big brand stores, and a comment about bank opening hours in Bungay. It has already been seen that frequent banking was an important activity in Bungay’s sample. A secondary debate in Bungay revolves around whether a second supermarket should be in or close to the town centre – some people feel that would bring them to Bungay more often. Visual appearance is a theme in Bungay, as it is in Beccles. In Bungay there is a general concern about property maintenance, as well as street cleaning and rubbish in general.

Halesworth

1. Car Parking: Views on Parking in Halesworth Town Centre

21% of the sample strongly disagree that charges for parking in that town are less costly than other towns, and a further 24% ‘disagree’, giving an overall level of disagreement of 45%. If we examine other contentious issues, then 25% ‘disagree’ that it is always possible to find a parking space in the town centre, and 7% strongly disagree. However, this appears to be less problematic than in Beccles. Halesworth seems to have more of a problem with its on-street/ off-street parking mix, with 14% strongly disagreeing that there is a good mix and 31% ‘disagreeing’, giving an overall level of disagreement at 45%. Halesworth has relatively little on-street parking compared to towns like Bungay, and this is likely to be problematic since on-street parking in Waveney is often free for 1-2 hours. Other issues seem comparatively less important in the Halesworth context – such as signposting or car park quality.

2. Factors Which Put People Off From Shopping in Halesworth Town Centre Shops

The price of car parking strongly comes out as the factor which the greatest number of respondents strongly agree has put them off shopping in Halesworth town centre shops, at 16% of respondents. 18% ‘agree’ that the price of car parking has put them off, giving an overall agreement by 34% of the sample that the price of car parking has put them off shopping in Halesworth town centre. This strongly agree level is higher in Halesworth than in Beccles, perhaps because of the lack of free supermarket shopping very close to the town centre. The availability of car parking spaces is also an issue, with 18% ‘agreeing’ that a lack of spaces has put them off shopping in Halesworth town centre and 5% strongly agreeing. Other factors appear less significant, but interestingly 14% ‘agree’ that a lack of standardised opening times has put them off from shopping in Halesworth town centre shops.
3. Reasons for Visiting Halesworth Town Centre: Key Attractors

64% of the sample are shopping in Halesworth twice a week or more often, which is very regular shopping. 26% shop in Halesworth weekly. Interestingly, Halesworth and Bungay have exactly the same percentage shopping more than twice a week and weekly. Beccles, however, has slightly lower rates of those shopping twice a week or more. In Halesworth’s case, the sample shows 28% are using a supermarket more than twice a week, and 40% weekly. This is lower than the level in Beccles, but much higher than in Bungay – where there is much less very frequent shopping in the supermarket. In terms of the highest frequency activities, 14% of the sample eat at cafés or restaurants more than twice a week, which is double the percentage in Bungay and a higher percentage than in Beccles. In terms of ‘weekly’ attractors into Halesworth, banking rates highly at 34% of the sample, 25% visit the weekly market and 19% eat at cafés or restaurants. Other activities are more infrequent, as in Beccles and Bungay – with special events attracting people every three months or six months (27% and 27% of respondents, respectively). Special events seem to be attracting more people in Halesworth than in Beccles, but Bungay seems to be drawing in a higher percentage of its sample with special events than in Halesworth.

4. Shopping Offering, Geography and Reasons to Shop: Halesworth Sample

In the Halesworth sample, 57% agreed or strongly agreed that they shop in the town centres they regularly shop in because they live in the town they shop in, while 56% agree or strongly agree it is because they live locally (outside the town but within 30 minutes driving distance). Those shopping where they do because they live in the town is much lower in Halesworth than in Bungay, but higher than in Beccles. Those shopping in the Waveney town centres they regularly shop in because they live locally (but outside the town) is lower in Halesworth than Beccles, but similar to Bungay. Halesworth serves a local market, but perhaps not to the extent of Bungay. 79% agreed or strongly agreed that they shop in the Waveney town centres they regularly shop in because they want locally-produced goods, which is higher than in Bungay and much higher than in Beccles. 85% agreed or strongly agreed that they shop in the town centres they regularly shop in because they want quality/fresh items, which is at a similar level to Beccles, and 41% because they want specialist or unique items. This is slightly lower than in Beccles and Bungay, which is a surprise given Halesworth’s famous range of independent shops. This suggests Halesworth is also a ‘destination centre’, but not with the importance anticipated. An extremely high percentage of the Halesworth sample shop in the town centres they regularly shop in because of the town environment (86% agreed or strongly agree), and a very high percentage because they enjoy the social or shopping experience (73% agreed or strongly agree). This is much higher than in the Bungay sample and the Beccles sample. This may tentatively suggest that Halesworth’s shopping offering is very strongly around the town environment and social and shopping experience, over and above that offered by Bungay and Beccles. 49% of the Halesworth sample say they strongly agree that they shop in the Waveney town centres that they regularly shop in because they can buy ethical or ‘green’ items. This is lower than Beccles but higher than Bungay.

5. Changes in Shopping Behaviour in Halesworth Town Centre Over Five Years

Only 9% of the sample said they were shopping in Halesworth town centre (excluding supermarkets) less than five years ago. The majority, 44%, are constant in their Halesworth shopping – shopping at the same level as five years ago. 36% of the sample say they are shopping in Halesworth more than five years ago. Those shopping in Halesworth less than they did five years ago is at the same level as in Beccles. There has been less loss of shopping in Halesworth than in Bungay.

If Shopping in Halesworth Town Centre Less Than Five Years Ago, Where Do You Shop Instead?

Halesworth was losing the majority of respondents shopping less to supermarkets at 69% of respondents, closely followed by ‘another town centre’ (62%) and Internet shopping (62%). Those suggesting they were shopping in a supermarket rather than Halesworth town centre cited a mixture of Waitrose (four mentions), Rainbow (Halesworth?), Beccles generally, Bungay and one mention of Tesco. Those going to another town centre mentioned Beccles (four mentions), Samundham (three mentions) and Southwold.
6. **Factors That Would Make Those Shopping in Halesworth Most Often Shop in the Town Centre More Often**

The factor achieving the highest percentage of ‘very important’ responses was ‘cheaper car parking’, at 40% of responses. This was the clear leader in Halesworth for what would make people in the sample shop in Halesworth more often. The next highest factor was more independent shops, with 30% of respondents rating this very important. 26% of respondents wanted better availability of car parking spaces. Other factors appeared less important for people in the sample.

7. **Poundfall in Halesworth**

There appeared to be two peaks in shopping spending between the 23% who spent £10-£20 and the 20% who typically spent £50+ when visiting Halesworth town centre. This was different from the spending pattern in both Beccles and Bungay for shopping. It suggests a split between ‘big spenders’ and more moderate spenders, and possibly a group of people coming in to Halesworth regularly to shop (more than once a week) and spending a moderate amount each time, compared to weekly shoppers who are spending more in one visit. Eating and drinking expenditure seemed to follow similar patterns to Bungay, in being split fairly equally across the £5-£10 range and the £10-£20 range in terms of the highest percentages of the sample spending an amount of money on eating or drinking. Entertainment and leisure spending followed similar patterns to the other market towns.

8. **Range of Things People are Shopping For or Services They are Using When They Go to Halesworth**

The results from the subset of shoppers who shop in Halesworth most frequently reveal the highest percentage are shopping in Halesworth town centre for food or groceries, at 97%. The next highest percentage are using services such as banks, hairdressers etc, at 91% - in a similar pattern to Bungay. Pharmaceuticals and toiletries are also purchased by a high percentage of respondents, at 87%. Buying household items is done by a greater percentage of respondents in Halesworth than in the other Waveney market towns examined so far – at 81%. Clothing is relatively infrequently purchased in Halesworth town centre at 40% of respondents, which is at similar levels to Bungay. Stationery, books, CDs etc are bought by a relatively high percentage of our sample (71%), compared to the other Waveney towns. This may be vulnerable to competition from Internet shopping, as our overall sample showed this category was a popular online purchase in Waveney.

9. **Improvements People Would Like to See to Halesworth Town Centre Which Would Make Them Shop There More Often: Qualitative Comments**

The comments in Halesworth cluster around three main themes – the need for more shopping variety, the desire for free or cheaper parking and the maintenance of Halesworth’s identity as a place of largely independent shops. There are a great deal of comments about what is missing from Halesworth’s shopping offering, as in Bungay - mainly based around clothing. Similar arguments are played out in Halesworth in terms of the repetition of certain types of shop – in Halesworth it is estate agents and cafés/ restaurants, which people would like to see less of. Car parking issues centre around the off-putting nature of car parking charges generally, and for people who just want to ‘pop in’ to the shops for a few items. Opening hours are mentioned by a few people, and they would like to see the abandonment of the traditional half day closing per week.

**Lowestoft**

1. **Car Parking: Views on Parking in Lowestoft Town Centre**

30% strongly disagree that charges for parking in the town are less costly than many other towns. This is a higher percentage of respondents strongly disagreeing than for all the other Waveney towns. A further 20% ‘disagree’, giving a general disagreement of 50% that charges for parking in the town are less costly than many other towns – the highest general disagreement of all the Waveney towns. 16% also strongly disagree that it is always possible to find a parking space in the town centre, while 20% ‘disagree’, giving a total in disagreement of 36%. 15% strongly disagree that there is a good mix between on-street and off-street parking. 12% also strongly disagree that the off-street car parks are convenient, clean and well-lit, which is
the highest percentage for this question amongst all the Waveney towns. Overall, this question indicates that amongst our sample of Lowestoft shoppers, car parking charges are the greatest concern, but that many other car parking issues are a source of contention.

2. **Factors Which Put People Off From Shopping in Lowestoft Town Centre Shops**

34% strongly agreed that traffic problems had put them off shopping in the town centre or their area’s shops, while 29% ‘agreed’, giving an overall agreement with the factor of 63%. This is much higher than in Bungay, the other Waveney town where traffic is regarded as very problematic. The next most important factor for putting people off shopping in Lowestoft shops was the price of car parking. 22% strongly agreed that the price of car parking had put them off shopping in town centre or their area’s shops, while 24% ‘agreed’, giving an overall agreement with the factor of 46%. This is the highest percentage of people put off by parking prices in the whole of Waveney. Other factors appeared less important, although 9% strongly agreed and 21% ‘agreed’ that the lack of availability of car parking spaces had put them off shopping in Lowestoft, and 6% strongly agreed and 20% ‘agreed’ that they had been put off from shopping in Lowestoft due to problems of sheltering in the rain. Overall, traffic problems and the price of car parking are the most important factors in Lowestoft that put people off from shopping there, amongst our sample.

3. **Reasons for Visiting Lowestoft Town Centre: Key Attractors**

It is evident from the figure below that people are most frequently visiting Lowestoft town centre to shop, with 41% of the Lowestoft sample doing this twice a week or more often. 29% of the sample were shopping weekly. However, visiting Lowestoft for work is more important than in any other of the Waveney towns in our shopper survey sample. 39% were visiting Lowestoft to work, twice a week or more often. Only 46% were not visiting Lowestoft to work in our sample, which is quite a contrast to the other Waveney towns. Visiting to use a supermarket was relatively low in the Lowestoft sample, with 20% visiting to use a supermarket twice a week or more often and 28% visiting to use a supermarket weekly. The pattern of supermarket use is closer to that of Bungay than the other Waveney market towns – the other market towns are seeing visits incorporating supermarket shopping with a much higher percentage of respondents on a twice weekly or weekly basis. Banking seems to be a regular attraction for visiting Lowestoft, with 6% of the sample visiting banks twice a week or more often and 20% weekly. However, visiting a weekly market seems much less of an attraction in Lowestoft than the other market towns (2% twice weekly, 4% weekly), as does visiting to eat at cafés or restaurants (6% twice weekly, 13% weekly). Visiting for special events also seems to be less important in Lowestoft than the other market towns.

4. **Shopping Offering, Geography and Reasons to Shop: Lowestoft Sample**

71% of the Lowestoft sample agreed or strongly agreed that they shop in the Waveney town centres that they regularly shop in because they live in the town where they regularly shop, and 47% agreed or strongly agree it is because they live locally to the town (but outside it). This may suggest that Lowestoft town centres is acting as a local centre to those living very locally within the town, but less so to those living slightly outside. The figure for those shopping in the Lowestoft town centres they do because they are living in the town is much higher than in Beccles, and the picture of local shopping is very similar to Bungay – with people in the town shopping in the town, but with less potential attraction from those outside the town itself but within 30 minutes driving distance. This suggests that Lowestoft may be a more ‘local’ centre in the GENECON classification than expected. If we examine the other factors, then a much lower percentage of the Lowestoft sample want locally-produced goods. 39% agreed or strongly agreed that they shop in the Waveney town centres they regularly shop in because they want locally-produced goods, which is a strong contrast to the other Waveney towns including Bungay, which has a figure of 73%. 47% agree or strongly agree that they shop in the Waveney town centres they regularly shop in because they want quality/ fresh goods, which again is very low. 29% agreed or strongly agreed that they shop in the Waveney town centres they regularly shop in because they want specialist or unique items, which is very low again compared to the other market towns. This suggests that Lowestoft may be acting as more of a local centre than a destination centre amongst our sample. This is very surprising given Lowestoft’s population, and there is perhaps an assumption that it should be acting as a sub-regional centre in the GENECON classification. The fact that it does not
appear to be from this sample is very concerning in relation to the economic performance of Lowestoft. If we look at the town environment factors, then the Lowestoft sample comes out very poorly in relation to the other Waveney towns. Only 28% of the Lowestoft sample agreed or strongly agreed that they shop in the Waveney town centres that they regularly shop in because they enjoy the town environment, and 28% because they enjoy the social or shopping experience. This is in comparison to the Halesworth sample who rate the town environment on the same question at 86% and the social and shopping experience at 73%. This suggests, along with Lowestoft comments to open questions seen previously in this report, that both the town environment and social and shopping experience are relatively poor in Lowestoft, and not the driver for shopping there as they are in the other Waveney towns. Buying ‘green’ or ethical items is very insignificant in this sample compared to the other Waveney towns, suggesting that either ethical or ‘green’ items are not a draw for the Lowestoft sample, or the shops in Lowestoft are not providing this type of item.

5. Changes in Shopping Behaviour in Lowestoft Over Five Years

35%, the majority, said they were shopping in Lowestoft (excluding supermarkets) less than they did five years ago. 31% said they were shopping in Lowestoft at the same amount as five years ago, and 28% more than they did five years ago. Lowestoft has the greatest percentage of respondents saying they are shopping in the town less than five years ago, than any other Waveney town.

If Shopping in Lowestoft Less Than Five Years Ago, Where Do You Shop Instead?

The highest percentage of respondents from this sample of those shopping in Lowestoft shops (excluding supermarkets) less than five years ago said they were shopping in supermarkets instead, at 73% of respondents. Out of town shopping was next at 57%, followed by Internet shopping at 53% and another town centre at 37%. In terms of other town centres, Norwich is mentioned twelve times, Great Yarmouth six times and Beccles four times. In our sample, Norwich appears to be the most successful town in pulling people away from Lowestoft town centre.

6. Factors That Would Make Those Shopping in Lowestoft Most Often Shop in the Town Centre More Often

The factor achieving the highest percentage of ‘very important’ responses was ‘better traffic management’ at 52%. Cheaper car parking was next, judged very important by 46% of the sample in getting them to shop in Lowestoft more. 42% rated ‘more town facilities’ as very important, and finally 40% of the sample judged ‘a more visually attractive town appearance’ as very important in getting them to shop in Lowestoft town shops more often. ‘Better availability of car parking spaces’ was rated as very important by 35% of respondents, and ‘more independent shops’ by 33%. The Lowestoft responses seemed to include a bigger range of factors given ‘very important’ ratings in getting people to shop in Lowestoft more often by a high percentage of people than the other Waveney towns – suggesting that multiple factors need to be addressed. This includes more variety of shops, more big brand high street names and a more bicycle-friendly environment amongst other factors.

7. Poundfall in Lowestoft

The highest percentage of responses around ‘shopping’ cluster around both £10-£20 and £20-£30, both at 27% of responses. 18% were spending more than £50 on a typical shopping trip for food. This is approximately the same as spending in Halesworth, higher than spending in Bungay and lower than the spending in Beccles. It perhaps suggests a mixture between supermarket shopping and other types of shopping. 30% of respondents are spending £5-£10 on eating and drinking in Lowestoft town shops. Entertainment spending followed the pattern of other towns.

8. Range of Things People are Shopping For or Services They are Using When They Go to Lowestoft

The highest percentage of respondents are shopping in Lowestoft for food or groceries, at 78%. This suggests a less food or grocery-oriented purchasing than amongst the other Waveney towns, who are consistently in the 90% range in terms of the percentage of respondents buying that category of food in each town. Clothing
purchasing is done by a high percentage of respondents, as in Beccles, with 74% of respondents buying clothes or items to wear in Lowestoft. However, we have seen that clothing or items to wear are vulnerable to Internet competition. A high percentage are buying pharmaceuticals and toiletries (70%) as in all the towns. Services in Lowestoft are also used by many respondents, with 67% using some kind of service in the town. The statistics give an impression that people are buying a narrower range of items from Lowestoft, since there are generally lower percentages in each category than the other market towns.

9. **Improvements People Would Like to See to Lowestoft Town Centre Which Would Make Them Shop There More Often: Qualitative Comments**

In terms of the improvement comments written for Lowestoft which would make people shop there more often, there are several themes which had very frequent comments. The most striking comments concerned the visual appearance of Lowestoft and things which needed improving. There were several sub-themes around visual appearance that were frequently mentioned. The first was around cleanliness, which were mostly articulated around various kinds of dirt – from dog mess to bird poo and stained paving. There were also comments around maintenance or the lack of it - in terms of cleaning, painting and repairing shops and buildings. People also wrote about things which could be done to make the town more visually attractive, particularly for visitors – centring around dealing with buildings or elements which would make a big visual impact such as the railway station, industrial fencing and rusty metal. There was also a very high frequency of comments about the shopping variety (or lack of it) in Lowestoft. As with other Waveney towns, people noted the kind of shops they would like to see, as well as the shops they thought there were too many of – charity shops, discount stores, betting shops, pawn shops and second hand stores. Comments about town facilities in terms of toilets were also very frequent, and traffic issues featured very frequently, as in Bungay.

Other themes also came to light, and these were most often related to other issues. For example, there were frequent comments about various negative shopping experiences people felt – around a fear of crime and anti-social behaviour or a threatening atmosphere, as well as various conflicts to do with traffic (such as mobility scooters, cars and bicycles). There was then a related theme about wanting more police and security. Other people tried to describe how an improved shopping experience may work out in Lowestoft – based around a relaxed atmosphere of music, nice places to eat outside, and a shopping trip which was not just utilitarian but a pleasant experience. Car parking issues were less frequently mentioned, perhaps because this was a sample of people shopping most regularly in Lowestoft, not all of them have cars and other issues were more prominent in their concerns.

**Footfall Data: Beccles, Bungay and Halesworth**

**Comparing Footfall Within Waveney**

The Waveney project also took footfall figures for some Waveney towns, as one ‘Key Performance Indicator’ (KPI) which is commonly used as a proxy for ‘economic success’ in town centres. If footfall averages are looked at across the towns surveyed in the footfall research, the aspect that is most evident is that Beccles’ footfall at the ‘Boots’ or New Market location is nearly twice that of the footfall at the next busiest area – Halesworth Thoroughfare. This would suggest that the Boots/ New Market location in Beccles is very vibrant, and that the potential economic success of that area of Beccles is greater than the other towns in the sample. However, when looking at the other footfall location in Beccles, the Kulture Shock area in Blyburgate, it is obvious that the whole of Beccles does not have the same level of footfall. In fact, the Kulture Shock area in Blyburgate has roughly a quarter the footfall of the Beccles ‘Boots’ or New Market location. This is quite an extreme level of polarisation in footfall terms, and certain policy implications flow from this for Beccles. Halesworth Thoroughfare is the next most busy location, with roughly half the footfall of Beccles Boots/ New Market. However, Halesworth also has a similar polarisation to Beccles, with the Market Place having roughly half the footfall of Halesworth Thoroughfare. Bungay has the lowest footfall of all the towns sampled in the footfall exercise, with a footfall average below 50 for both of its locations, as an average for each time period sampled. Bungay’s footfall is similar to the quietest areas of Beccles and Halesworth. Although the Buttercross area of Bungay is busier than that of Earsham Street by approximately 20 people for each hour sampled, Bungay is relatively disadvantaged economically as a whole in terms of its footfall, when compared to Halesworth and Beccles.
Comparing Waveney to Towns in the East of England

St Ives, Cambridgeshire and Beccles are of similar size in shop terms. Beccles has 120 shops (use classification A1) and St Ives (with a bigger population than Beccles), has 114 A1 shops. Beccles could be considered to be doing well in terms of its economic performance as measured by footfall, as compared to St Ives. Halesworth and Bungay are much smaller towns in population terms and have 58 and 68 shops respectively in use classification A1. They therefore have roughly half the A1 units of St Ives and Beccles. Halesworth Thoroughfare appears to be doing well compared to its size, retaining more than half the footfall of St Ives on a busy day and almost the same footfall on a quiet day. However, Bungay’s footfall compared to its number of A1 shops is concerning. While it has 60% of the A1 shops that St Ives has, its footfall in Bungay Buttermere is 35% of St Ives’s. Those Waveney areas with footfall under 50 using this methodology – Bungay Earsham Street plus Halesworth Market Place and Beccles Blyburgate, are likely to struggle to achieve the sales they require to sustain themselves, depending on their own individual conversion rates.

Halesworth Footfall Drop Off After Lunch

During the Halesworth stakeholder meetings, there had been some concern about the drop off of footfall in the afternoon in both Halesworth Thoroughfare and the Market Place. The decline in the Halesworth Thoroughfare and Halesworth Market Place footfall after lunch (12.40-12.50) is quite dramatic on busy days. The footfall figures for Halesworth would suggest that strategies should be adopted to increase footfall after lunch, or perhaps there is a perception amongst the public that some shops shut at random times in the afternoons.

The Impact of Events

It is clear that some events can triple footfall by more than eleven times for some town centres. Both Beccles Antiques Fair and Bungay Sunday Street Market were very successful in bringing in footfall for those respective towns. Bungay benefited most from events, due to its normal comparatively low footfall. However, it is important to recognise that events do not always bring footfall. The exceptionally rainy spring/summer of 2012 meant that some events did not pull in the footfall figures that would have been expected on a fine or warm day. Careful thought is needed on how best to leverage events to maximise the benefit for local shops.

Implications of the Study for Policy and Practice

This recommendations section takes the form of a ‘SWOT’ analysis. SWOT analyses are frequently used for town centre analysis. ‘SWOT’ stands for ‘Strengths’, ‘Weaknesses’, ‘Opportunities’ and ‘Threats’. SWOT analysis is particularly useful in the context of improving the economic performance of the Waveney towns because it focuses on internal issues to Waveney plus external issues and changes, as well as providing ideas of what can be capitalised on as well as problems to be dealt with. The results of the SWOT analysis are presented below as a series of numbered points.

Waveney Level SWOT Analysis

Waveney Level Strengths

1. The town environment and social and shopping experience
2. Waveney has a strong and loyal core of regular local shoppers
3. Evidence of ‘shopping resilience’ in Waveney, despite the economic downturn
4. Shoppers seem to value Waveney’s independent shops, and want more of them
5. Waveney is particularly attracting people because they want quality and fresh items, and locally-produced goods
Waveney Level Weaknesses

1. Car park pricing overall cost and pricing structure, although policy changes in the right direction have now been made
2. Car park availability and lack of responsiveness to user car parking needs: shoppers and workers
3. Shopping variety: loss of certain shops, repetition of types of shops, missing shops
4. Lack of ‘professional’ town centre management across the Waveney towns
5. Disparities between the ‘market towns’ and Lowestoft

Waveney Level Opportunities

1. Resurgence of the local
2. Connecting ‘bricks and mortar’ (offline) retailing in town centres to online shopping and the Internet
3. Giving Waveney shoppers the benefits of Internet Shopping in the ‘bricks and mortar’ environment: click and collect
4. Exploring the role of advertising the retail offer of Waveney: print media, the Internet and social media
5. Rethink the identities of the market towns vs. Lowestoft in advertising – the Waveney identity
6. Capitalise further on events

Waveney Level Threats

1. Internet shopping
2. Supermarket dominance
3. Threats from other town centres
4. Continuing economic downturn
5. Funding pressures on Waveney District Council
6. Lack of consensus at both town and regional levels about how to make improvements

Town Specific SWOT Analysis: Beccles

Beccles’ Strengths

1. Beccles’ footfall
2. Beccles is the town the greatest percentage of our sample shop in most often
3. Beccles town centre seems to be benefiting from changes in shopping behaviour in our sample, rather than losing out
4. Beccles town centre is gaining cross-over shopping from Tesco in our sample
5. The Beccles town environment and shopping experience is attractive
**Beccles’ Weaknesses**

1. A polarised town in terms of footfall
2. Lack of car parking availability
3. Car park pricing
4. Shopping variety and more independent shops needed
5. Poor visual appearance of a central town location

**Beccles’ Opportunities**

1. Build on dominance in footfall and shopping share
2. Reduce polarised footfall
3. Build on the weekly market
4. Internet advertising and Internet shopping

**Beccles’ Threats**

1. Internet shopping
2. Greater supermarket dominance or expansion
3. Traffic problems: Beccles may become a victim of its own success

**Town Specific SWOT Analysis: Bungay**

**Bungay’s Strengths**

1. Loyal local customers
2. Very regular customers
3. Town centre environment and shopping experience, but with a caveat about traffic

**Bungay’s Weaknesses**

1. Traffic problems – real and perceived
2. Car parking charges, although recent policy changes may help
3. Car parking availability
4. Car parking enforcement
5. Shopping variety
6. Bungay town centre seems to be losing out from changes in shopping behaviour in our sample, rather than gaining
7. Low footfall
8. Low poundfall
**Bungay’s Opportunities**

1. Bungay has the potential to build on ‘destination centre’ functions
2. Build links from a town website to existing online shops
3. Better enforcement of limited free on-street parking may give better access to town centre shops
4. A small town centre supermarket
5. More events

**Bungay’s Threats**

1. Further politicisation and negative media coverage of the one way system
2. Shopping in other town centres
3. A second large supermarket
4. Further bank closures – banks a key attractor
5. Internet shopping – gift sector
6. “Bungay is dying”: cumulative factors

**Town Specific SWOT Analysis: Halesworth**

**Halesworth’s Strengths**

1. Very attractive town centre environment and social and shopping experience
2. A core of very regular shoppers
3. Relative resilience to changes in shopping behaviour over five years
4. Reasonable footfall for the number of A1 shops: Halesworth Thoroughfare
5. Independent shops
6. Attraction of cafés or restaurants

**Halesworth’s Weaknesses**

1. Car parking charges, although recent policy changes may help
2. Car parking availability (central car parks)
3. Shopping variety – missing shops
4. Footfall ‘drop off’ after lunch
5. Polarised footfall

**Halesworth’s Opportunities**

1. More events
2. Desire for even more independent shops
3. Halesworth has a very marketable identity in advertising terms
4. More Internet advertising, links to online shops and social media use
Halesworth's Threats

1. Loss of trade to competitors: supermarkets and other town centres
2. Supermarket expansion
3. Branded shops
4. Internet shopping
5. Vulnerable to bank branch closures

Town Specific SWOT Analysis: Lowestoft

Lowestoft's Strengths

1. Tourism, architectural heritage and coastal environments

Lowestoft's Weaknesses

1. Traffic problems
2. Car parking charges
3. Car parking availability
4. A poor shopping experience
5. Improvements needed in town environment
6. Lack of perspective of shopper issues – toilets
7. Lack of shopping variety
8. A local centre when it should be a sub-regional centre
9. A sense of a shopping area in decline

Lowestoft's Opportunities

1. Development of the town environment and architectural heritage
2. More events
3. Make the shopping experience less mundane and more enjoyable
4. Bring people in from the other Waveney market towns
5. Improve Internet presence and social media

Lowestoft's Threats

1. Further supermarket grabbing of town centre shopping
2. Strong competition from other sub-regional centres and other town centres
3. Further car park price increases
4. Further public transport price increases
5. A further spiral of decline
6. Internet shopping
7. Bank closure vulnerability
Feeding Back Survey Results to Business Stakeholders and the Portas Pilot Town Work

The detailed survey results and the SWOT analysis in this section will be fed back in to both the local business groups who initiated this project in the first place, and also to the Portas Pilot work in Lowestoft. The survey results also empirically support some of the planned projects from the Lowestoft Portas Pilot town funding, as well as some of the key issues identified in the Lowestoft Business Improvement District. It is hoped that the detailed and nuanced picture of the improvements needed in Waveney overall and in the specific towns within Waveney will lead to improvements being carried out; further reflection on the state of Waveney’s high streets; and most importantly, to increased consumer spending and footfall in Waveney. This report, lengthy as it is, is an exploratory study which needs key business stakeholders to embrace its ideas, and to build on its research foundations.