

North Walsham High Street Heritage Action Zone Update & Town Centre Health Monitoring Framework	
Executive Summary	This report applies a methodology for monitoring the health and vitality of north Norfolk town centres. Within this framework it considers how North Walsham town centre has fared since the end of the North Walsham High Street Action Zone (HSHAZ) programme, which was delivered between the spring of 2020 through to April 2024. The programme entailed the delivery of a suite of projects, including improvements to the public realm and the restoration & repair of historic buildings.
Options considered	No other options considered
Consultation(s)	N/A
Recommendations	The Overview & Scrutiny Committee are recommended to: 1. Note the contents of the report recognising the contribution the HSHAZ programme made to the achievement of key Corporate Plan objectives. . 2. Provide any feedback in relation to the proposed framework for town centre health monitoring, which builds further on some of the positive work already undertaken to profile north Norfolk town centres.
Reasons for recommendations	It is important that the Council continues to help local town centres fulfil the role of service centres, meeting the needs of local residents and businesses. As such, seeking to implement a robust set of monitoring criteria will better place the Council in its development of future policy and provide a good evidence base to support the business case for future projects, interventions and potential funding bids.
Background papers	N/A

Wards affected	All Wards
Cabinet member(s)	Cllr John Toye, Portfolio Holder for Sustainable Growth
Contact Officer	Stuart Quick, Economic Growth Manager, stuart.quick@north-norfolk.gov.uk

Links to key documents:	
Corporate Plan:	The recommendations of this report align with the following objectives of the Corporate Plan: 'Investing in Our Local Economy & Infrastructure' (<i>An environment for business to thrive in & Infrastructure to Support Growth</i>) – specifically the objective: <i>working with our Market and Resort Towns to reinforce their roles as local service centres, centres of employment, financial services and business activity, served by public transport</i> ; as well as 'Developing Our Communities' (<i>Increase accessibility and inclusion for all</i>).

Medium Term Financial Strategy (MTFS)	N/A
Council Policies & Strategies	North Norfolk Economic Strategy

Corporate Governance:	
Is this a key decision	No
Has the public interest test been applied	N/A
Details of any previous decision(s) on this matter	17 July 2024 – North Walsham High Street Action Zone Programme: End of Project Report (see 1.1)

1. Purpose of the report

- 1.1 This report is intended to update the Overview & Scrutiny Committee on the impact of the North Walsham HSHAZ, following the Committee's recommendation of 17 July 2024 *"to update in 12 months' time on the impact of the initiative and learning from this, to establish a set of evaluation criteria, including baselines, that can then be used for similar projects in other towns in North Norfolk."*
- 1.2 The Committee considered an independently produced evaluation of the programme at the time which appraised the workstreams against a broad set of criteria. This report does not intend to repeat this exercise, but instead proposes an outline as to how the Council could consider adopting a more evidence-based approach to town centre health monitoring and, within this framework, consider how North Walsham has fared and how such a model could be applied to other town centres. Such an approach could improve how the Council responds to the needs of our town centres, red flagging any concerning issues and providing the evidence required to support potential funding bids for appropriate interventions.

2. Introduction & Background

- 2.1 North Walsham was selected as a High Street Heritage Action Zone (HSHAZ) in 2019 following a successful bid to Historic England. Subsequent funding was also secured to widen the scope, with a total budget of around £3.8m. The town had experienced declining vitality, poor-quality public realm, negative perceptions and underused heritage assets. At the same time, it had a strong historic character, a long-standing market culture, and an engaged community – qualities that gave it significant potential for regeneration.
- 2.2 The programme's overall aim was to improve the town centre's vitality and attractiveness to shoppers, visitors and businesses by capitalising on its built heritage, with a complete programme of five interlinked workstreams with various budgets and timelines. The HSHAZ project officially ran from April 2020 until April 2024, but there were significant delays to the various schemes because of issues including the COVID-19 pandemic, rising costs, and lack of resources.
- 2.3 The five workstreams were:

1. Public Realm Improvements (Placemaking): improvements to key physical spaces and 'restitching' of the town's historic core.
2. Building Improvement Grant (BIG) Scheme: grants to support the restoration of historic buildings and bring vacant floor space back into use.
3. Cedars Historic Building Restoration: a Grade II visually and historically important building that sits at a principle gateway to the town centre.
4. Cultural Programme: activities and events designed to work with the public realm and improve perceptions of the high street and its heritage.
5. Wayfinding & Interpretation: a design scheme to enhance the visitor experience and build greater civic pride in North Walsham's history.

2.4 The project also attracted significant match funding. The BIG scheme was structured with private investment built in and received upwards of £190k from business owners and landlords. As part of the public realm improvements, the New Anglia LEP provided £1.1m, Norfolk County Council approximately £470k and North Walsham Town Council £45k. Of this, nearly £80k went towards improvements within the HSHAZ boundary, including additional road surfacing, bike hoops, electricity pillars and lighting. Related projects, which were not part of the HSHAZ but were closely linked, included the creation of a bus interchange (completed in June 2022), which used the front part of New Road Car Park, and new and refurbished toilet facilities on New Road and Vicarage Street.

2.5 Towards the end of the programme, an independent evaluation was commissioned by NNDC. This report, considered by the Overview & Scrutiny Committee in July 2024, employed a range of methods to understand the more immediate impact of the programme, including stakeholder interviews, an engagement day and an impact assessment survey. Historic England also conducted its own survey of the wider cultural programme. The evaluation report considered the programme against a number of objective themes, including environmental impact, accessibility & inclusivity, historic preservation, cultural impact and economic impact.

3. Town Centre Health Monitoring

3.1 It is proposed that the Council seeks to further develop its economic intelligence by developing a town centre health monitoring dashboard for each of the towns. Recent improvements to some of the data sources available (in particular ActiveXchange – which analyses footfall from mobile phone data) means that the Council is well placed to develop town centre monitoring methodology that brings together both external and internally held data sources into a single monitoring report. Most of this data already exists, although not all in one locality. Some development has already been undertaken, but the input of the Committee as to what it considers are the priority themes would be welcome.

3.2 Undertaking regular monitoring of town centre vitality provides a range of practical benefits for councils, businesses and residents. The value goes beyond simply collecting data; it creates a shared evidence base for decision-making, accountability and investment. The benefits of this approach include:

➤ **Evidence-Based Decision Making**

- Reliable data allows the Council to not rely on anecdote and perception.

- Investments in public realm, events or transport can be justified and prioritised according to measured need.
- Trends (e.g. footfall decline or rising vacancy) can be identified early, allowing preventative action before issues become entrenched.
- **Benchmarking and Comparative Learning**
 - Monitoring enables towns within North Norfolk to be compared consistently with each other, identifying strengths and weaknesses.
 - National and regional comparisons (where available e.g. Norfolk County Council's Market Town Reports) would allow NNDC to understand whether local patterns are unique or part of wider trends.
 - This benchmarking helps demonstrate whether North Walsham or other towns are 'bucking the trend' or movements are consistent.
- **Supporting Funding Bids and Investment Cases**
 - Grant funders such as Historic England or Government regeneration programmes increasingly require robust baseline and monitoring data.
 - Having consistent metrics allows the Council to demonstrate impact and value-for-money, strengthening the chances of success in competitive bidding.
- **Long-Term Resilience**
 - Town centres face structural challenges from online retail, changing consumer behaviour, and wider economic shocks.
 - A monitoring framework allows NNDC to track these changes in real time, adapt quickly, and build resilience.
 - It ensures regeneration is not a one-off project but part of an ongoing cycle of learning and improvement.

Town Centre Vitality Themes

3.3 It is considered that there are 5 key themes for monitoring town centre health:

- i. Footfall & Town Centre Activity
- ii. Visitor Profiling
- iii. Car Park usage
- iv. Vacancy Rate, Business Unit Mix & New Investment
- v. Public Transport Patronage

3.4 Footfall and Town Centre Activity

Footfall is the single most recognised measure of town centre health. It provides a direct indicator of how many people are present in the town centre, and when. Patterns of hourly daily, weekly and seasonal variation can demonstrate how well a town is functioning, the effect of interventions or even when best to time them (such as cultural events), and the impact of external pressures such as weather or the wider economy. Moreover, understanding dwell time is very useful as the longer people spend in a town typically results in greater local spend. Shorter dwell times tend to indicate that visitors are just coming into the town to access basic services (e.g. a haircut, pharmacy).

Figure 1 ● 2023 ● 2024

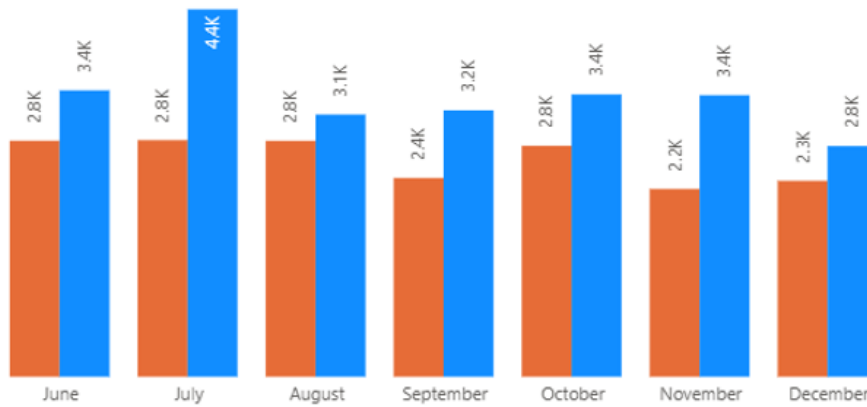
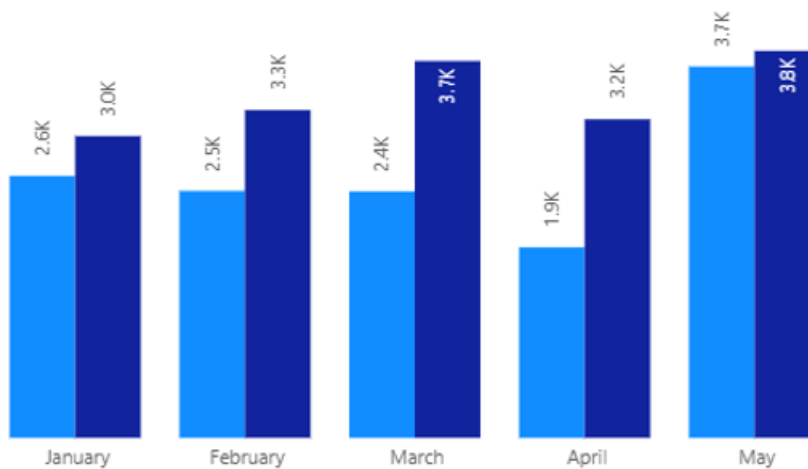


Figure 2 Year ● 2024 ● 2025



- 3.4.1 The North Walsham HSHAZ project ran for four years with all the town centre works finished by end of March 2024. The major capital works and disruption occurred at the Church Approach/Shambles site between February and August 2023. Major infrastructure works in the main marketplace happened between September 2023 and March 2024.
- 3.4.2 Presently there is only ActiveXchange data for 2025 up to May. **Figure 2.** compares footfall in 2025 against the corresponding months in 2024. Where it is not possible to reflect on data in 2025, **Figure 1.** has used 2023 as the baseline and looked at the footfall data comparisons to 2023. All months, both 2024 – 2025 and 2023 - 2024 have shown an upward trend in footfall. Whilst the specific purpose of HSHAZ was not necessarily to deliver increased footfall, it is reassuring to note that footfall appears not only to have been maintained but increased in the period post the capital work improvements to the town centre.

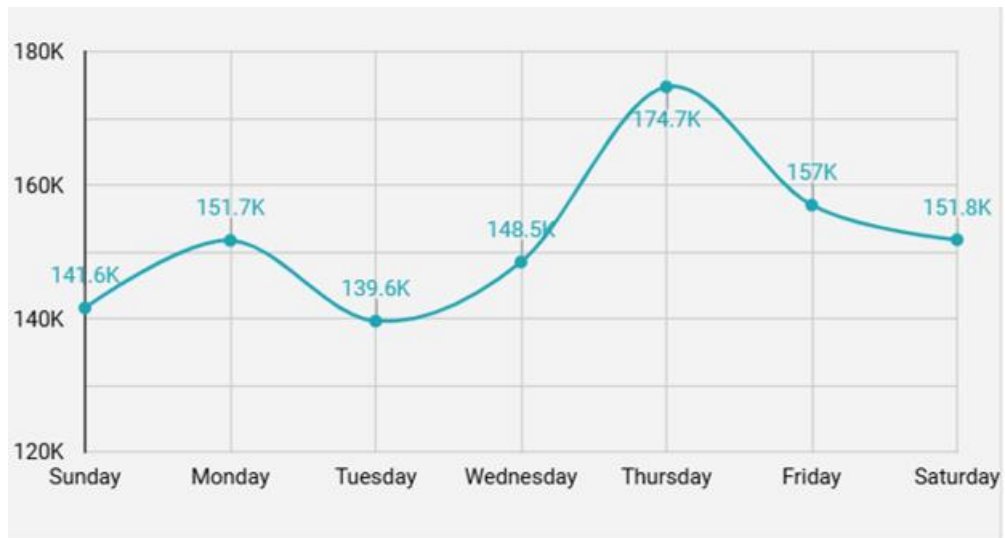


Figure 3 – Daily Visitation Trend (Jan 24-June 25)

3.4.3 **Figure 3** illustrates that Thursday market days continue to outperform non-market days, highlighting the enduring role of the traditional market as a driver of activity. 72.4% of visits to the town are during weekdays.

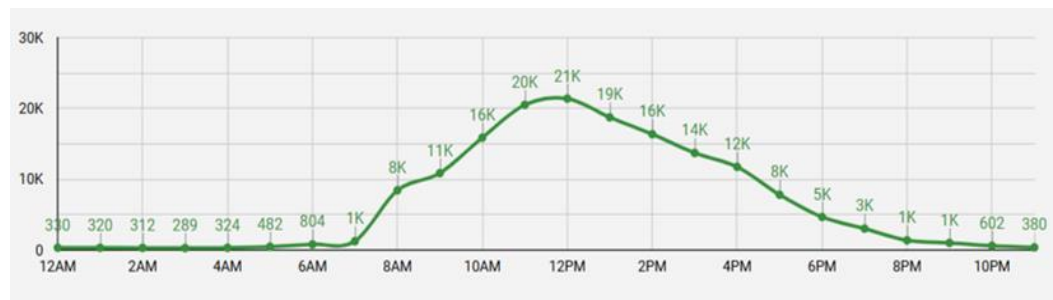


Figure 4 – Hourly Visitation Trend (Jan 24-June 25)

3.4.4 **Figure 4** illustrates that visits to the town typically align with normal working hours – climbing steadily from 8am, peaking at mid-day and trailing off at 6pm. This is as one might expect, with activity peaking around lunchtime, particularly with Paston College having two sites close to the town centre. Notably there is very little indication of a night-time economy.

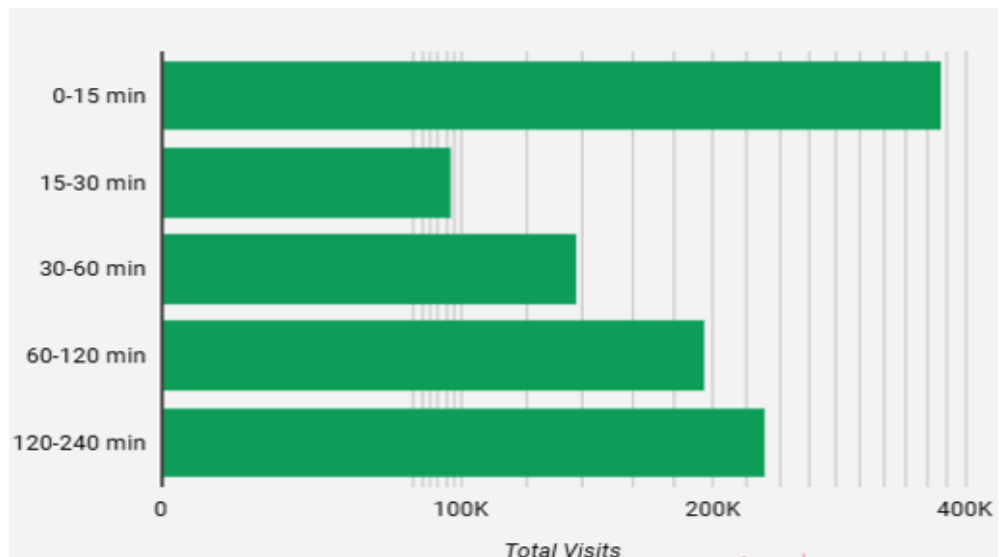


Figure 5 – Visitation Dwell Time – North Walsham (Jan 24-June 25)

3.4.5 **Figure 5** illustrates that the majority of visits are either very brief (<15mins) or 2-4hours+. This suggest that the town centre is likely serving two or three distinct purposes:

- i. **Functional/Convenience** – people are coming into town for quick errands – picking up groceries, using the post office, pharmacy etc. Note that this could also include students/workers entering the town centre to quickly pick up lunch and return to college/work.
- ii. **Work** – people are working within the town and thus reflected in prolonged dwell time.
- iii. **Leisure/Social** – visitors are perhaps spending time socialising and spending sustained time within cafes/restaurants.

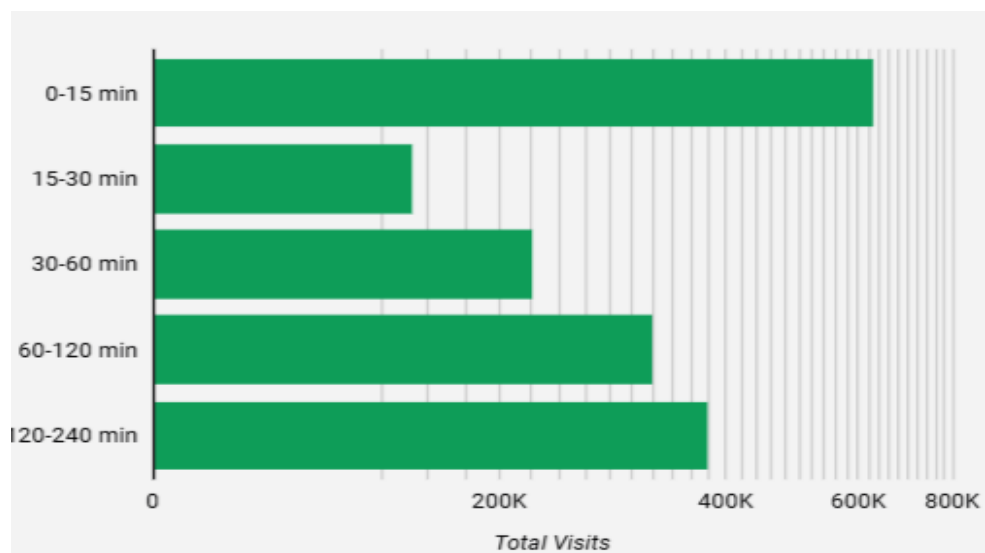


Figure 6 – Visitation Dwell Time – Fakenham (Jan 24-June 25)

- 3.4.6 For comparison, **Figure 6** illustrates that the dwell time for North Walsham is entirely consistent with Fakenham, a not dissimilar market town to the west of the district.

3.5 Visitor Profiling

Visitor profiling is an important component of town centre health monitoring because it provides actionable insights into who is using the town centre, how they use it, and where they come from. Demographics (age, gender, income level, etc.) help identify which groups are engaging with the town centre. Origin data (where visitors travel from) reveals catchment areas and helps assess the town's regional draw. Profiling can help estimate spending power and consumer behaviour. This work is still in development, but visitor profiles can be tracked to detect shifts in user demographics, assess the impact of interventions (e.g. new transport links, public realm upgrades) and evaluate resilience to shocks (e.g. post-COVID recovery, cost-of-living impacts).

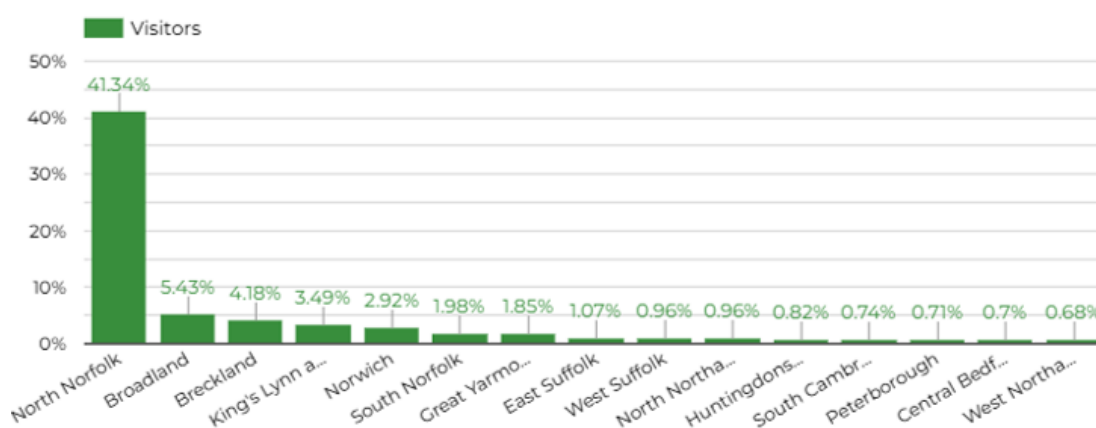


Figure 7 – Visitor Origin (Jan 24-June 25)

- 3.5.1 **Figure 7** illustrates that North Walsham, unsurprisingly as an inland market town, serves a fairly localised visitor market. Nevertheless, its location is near to the border of the Broadland district, with Aylsham just 8.5 miles away, and so there inevitably will be people travelling from within that locality and similarly from Breckland (20 miles away). North Walsham is also on the Bitten train line to Norwich and so that will account for a proportion of visitors, perhaps commuting for work purposes.

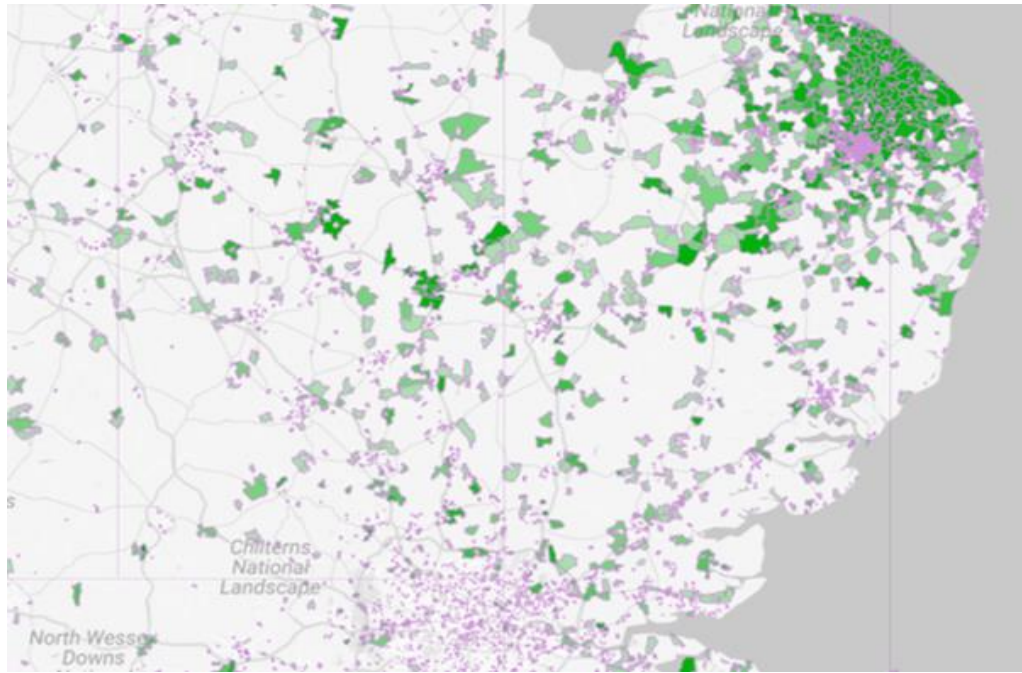


Figure 8 – Visitor Origin Map(Jan 24-June 25) Light green (low intensity) to dark green (high intensity)

3.5.2 The map in **Figure 8** illustrates the visitor origins over the past 18 months, again demonstrating the fairly concentrated local visitor draw.

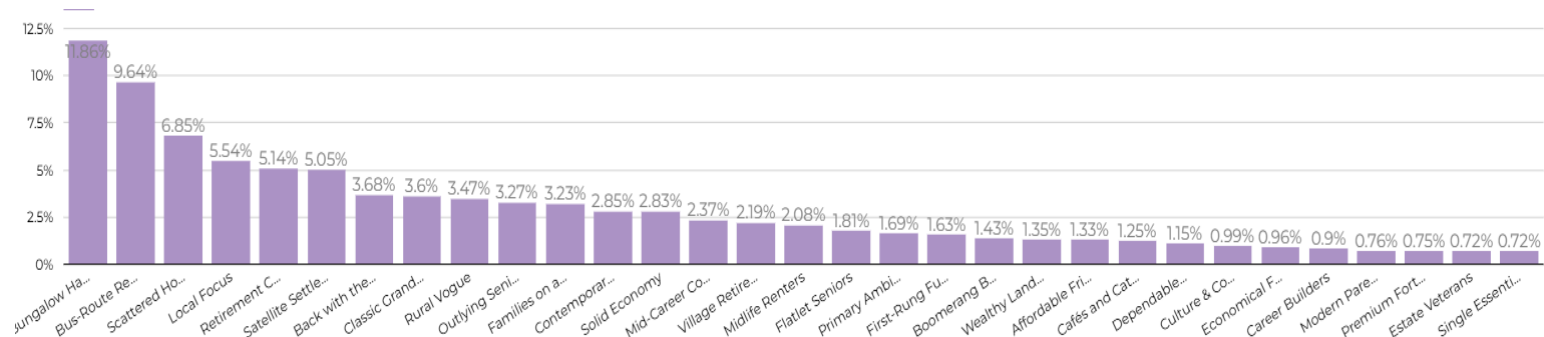


Figure 9 – Visitors by Demographic Segment (Jan 24-June 25)

3.5.3 **Figure 9** breaks down the demographic segments of the people spending time within the town. The top third of visitors are aligned to four profile types. A visual illustration of each of these can be found in **Appendix A**. These are:

- i. **Bungalow Havens** (11.86%) – typically retired couples, homeowners (bungalow estates), degree educated, low technology/online users, lower incomes.
- ii. **Bus-Route Renter** (9.64%) – typically singles renting often private flats, GCSE educated, medium technology/online users, lower incomes.
- iii. **Scattered Homesteads** (6.85%) – typically older/retired couples, homeowners (larger, detached, rural), vocational qualifications, low technology/online users, medium income.
- iv. **Local Focus** (5.54%) – typically families, renting affordable semi-detached homes in neighbouring rural villages, few qualifications, low

technology users (but strong preference for social media), medium incomes.

- 3.5.4 Understanding visitor segmentation can be highly useful when assessing town centre health and vitality. For example, residents in bungalow havens (often older populations) may prioritise accessibility, healthcare, and quiet leisure spaces. Scattered homesteads may rely heavily on transport and need consolidated services when they do visit. Local focus may visit frequently for everyday needs, so maintaining a vibrant mix of shops and services is important. Bus-route renters might be looking for frequent, affordable, and punctual bus services, essential for commuting to work, education, or shopping. Monitoring this over time and comparing with other town centres might help the Council and stakeholders to better align the activities and focus of efforts within these towns.

3.6 Car Park Usage

Monitoring town centre car parking usage (volume and length of stay) helps to corroborate the footfall data and dwell time, identify the key entry points for visitors and whether there are trends in dwell time vs distance from town centre. Potentially this could also inform future pricing models.

- 3.6.1 North Walsham is well served by a number of local car parks, many within less than two minutes' walk to the Market Place. For the purposes of this exercise, this report focuses on the three close-by NNDC-owned car parks. All three car parks have demonstrated a significant increase in car park usage post the HSHAZ project, despite 2025 being an incomplete year at the point of this report being produced.

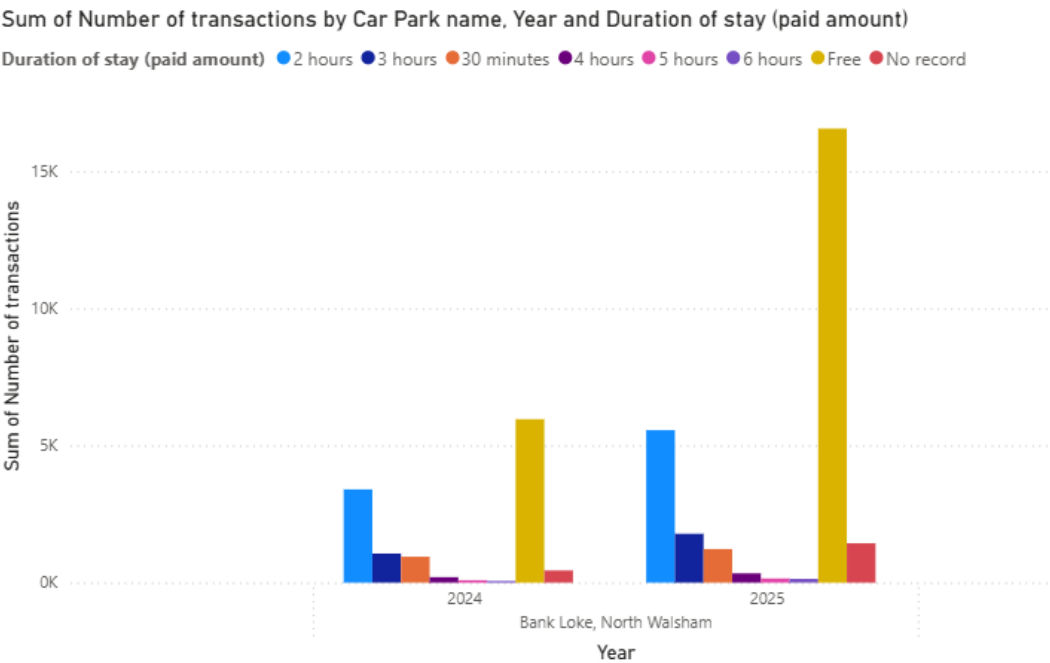


Figure 10 – Bank Loke Car Park

- 3.6.2 Bank Loke Car Park, illustrated in **Figure 10**, shows a marked increase in use between 2024 and 2025, especially for short-stay parking. This is potentially linked both to policy changes (extending free parking from 30 minutes to 1

hour) and possibly to external market shifts, such as the introduction of charges at the adjacent Roys' private car park. The data suggests a healthy churn, enabling frequent, short trips into the town centre.

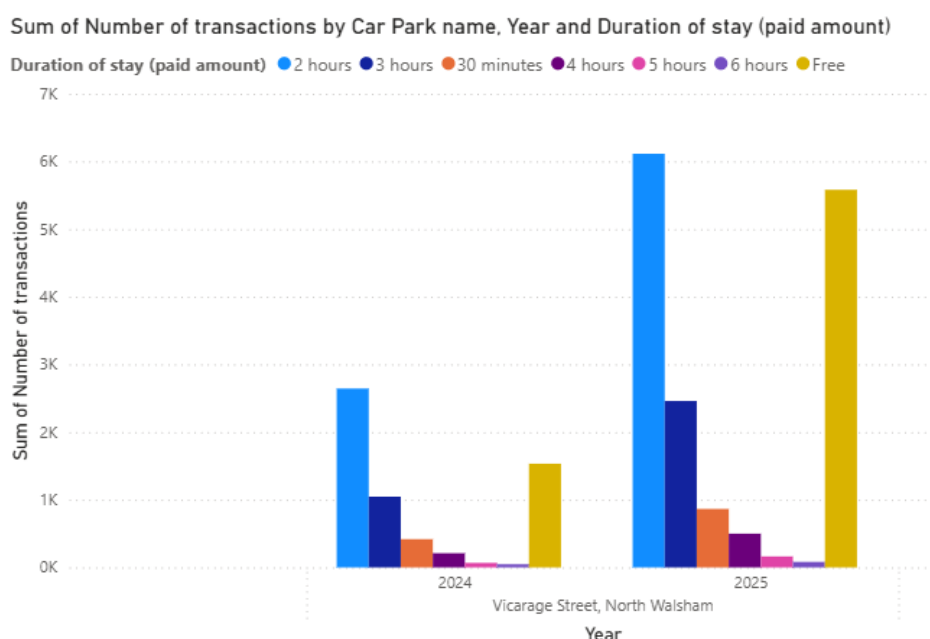


Figure 11 – Vicarage St. Car Park

- 3.6.3 Vicarage St. Car Park, illustrated in **Figure 11**, demonstrates a clear preference for two-hour stays over shorter slots. This indicates visitors parking here are spending longer in the town, perhaps undertaking multiple activities such as shopping, services, and leisure. Nevertheless, the relocation of free parking spaces (with the increase in time) from Market Place into Vicarage Street also potentially accounts for the sizable increase in drivers parking for the free 1-hour provision.
- 3.6.4 The implication is that car park policy can directly support dwell time, which is linked to higher spend per visitor. Comparative evidence from the National Association of Town Centre Management supports this, showing that towns with balanced provision of short and medium stay spaces tend to outperform in terms of both visitor satisfaction and economic yield.

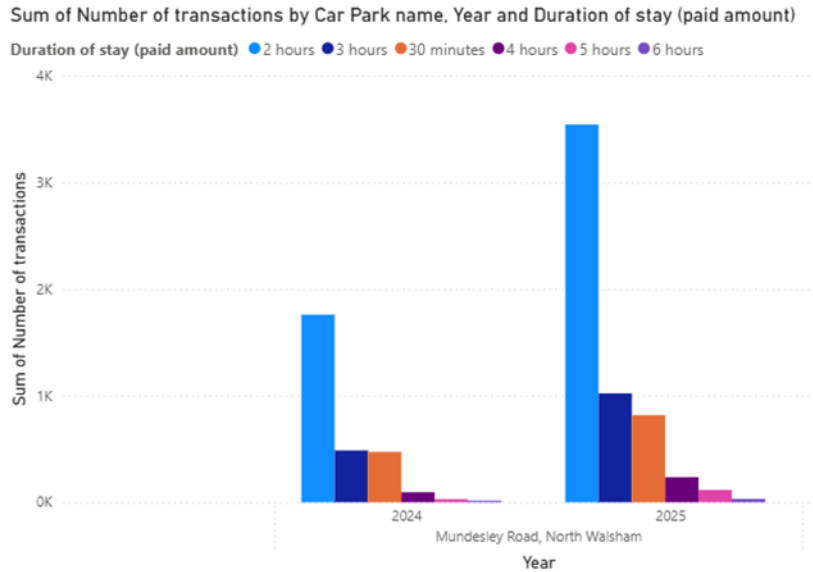


Figure 12 – Mundesley Road Car Park

3.6.5 Mundesley Road Car Park, illustrated in **Figure 12**, is more set back than the other two car parks. It does not have a short-term free parking provision, but nevertheless shows a preference for visitors to stay for 2 hours.

3.7 Vacancy Rate, Business Unit Mix & New Investment

Monitoring town centre vacancy rates, the mix of business unit types, and the volume and nature of new investments provides a comprehensive picture of economic vitality, resilience and future potential.

i. **Vacancy Rates**

High vacancy rates often signal economic distress, while low vacancy suggests strong demand and confidence. Moreover, vacancy rate monitoring, with sufficient time elapsed, helps to assess the impact of regeneration schemes, policy interventions, or economic shocks (e.g. COVID-19, cost-of-living crisis). Persistent vacancies in specific locations may indicate structural issues (e.g. poor access, low footfall, unattractive environment).

ii. **Business Unit Mix**

A diverse mix (retail, hospitality, services, culture, community uses) supports resilience and broadens appeal. Over-reliance on one sector (e.g. retail) increases vulnerability to market shifts.

iii. **New Investment**

Monitoring unit take up (both new and expansion into bigger units) is a good proxy for tracking business confidence in the town centre from both public and private sectors. In addition, it can also reveal emerging trends (e.g. shift to leisure, co-working, residential, health & wellbeing).

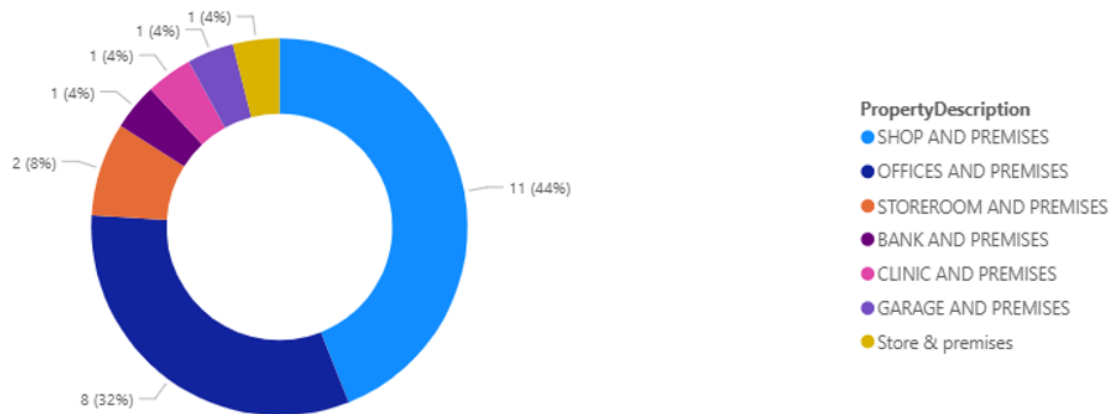


Figure 13 – Vacant units in North Walsham town centre

3.7.1 **Figure 13** illustrates that there are presently 18 (out of 138) units vacant in North Walsham which means a vacancy rate of 13%. However, in terms of retail there are 11 units (8%).

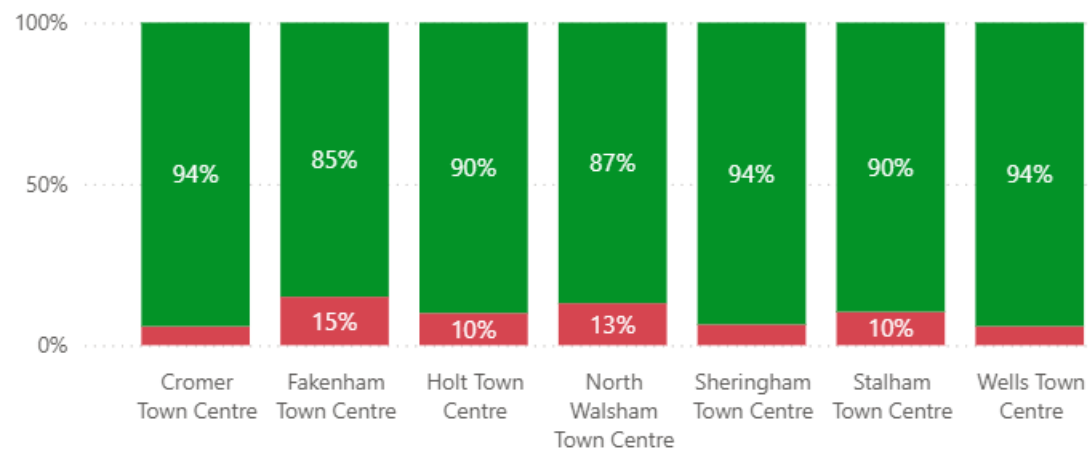


Figure 14 – Vacancy Rates – North Norfolk Towns

3.7.2 **Figure 14** compares vacancy rates of the towns of north Norfolk. Notably the coastal resort towns have a distinctly lower vacancy rate (6% average) vs the market towns of Fakenham, Holt, North Walsham and Stalham, which range 10-15%. As of mid-2025, the average UK town centre business unit vacancy rate is approximately 13.6% for high streets and 16.9% for shopping centres (source: [Savills](#)). As such, North Walsham's vacancy rate is considered comparable to other local market towns and no higher than the UK average.

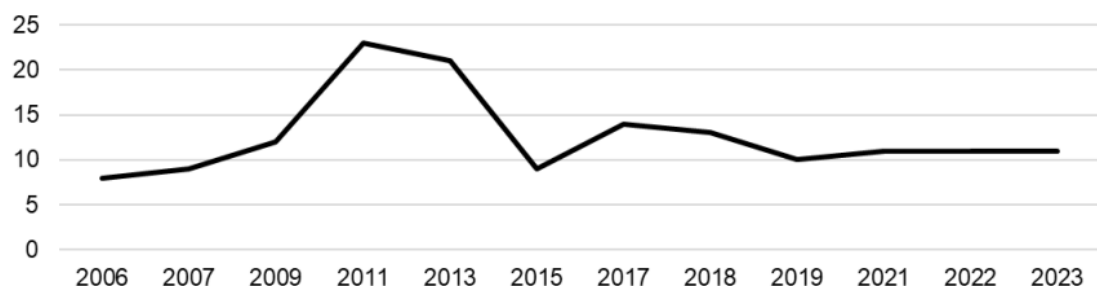


Figure 15 – Vacant Unit Count – North Walsham – Market Town Report 2023

- 3.7.3 Refinements to the Council's town centre monitoring should include trend data to understand vacancy rate changes over time and highlight any concerns. However, at the point of this report, the latest trend data available is from the Market Town Report 2023 (2024 is not available yet) which is produced by Norfolk County Council. This captures vacancy units (not rates) but is believed to be conducted as a visual snapshot and, as such, may not reflect the full breadth of units available. Nevertheless, **Figures 15** suggests that North Walsham town centre has experienced a relatively stable period since 2015, with unit vacancies rising and peaking in the period post the global financial crisis recession of 2008-2009.

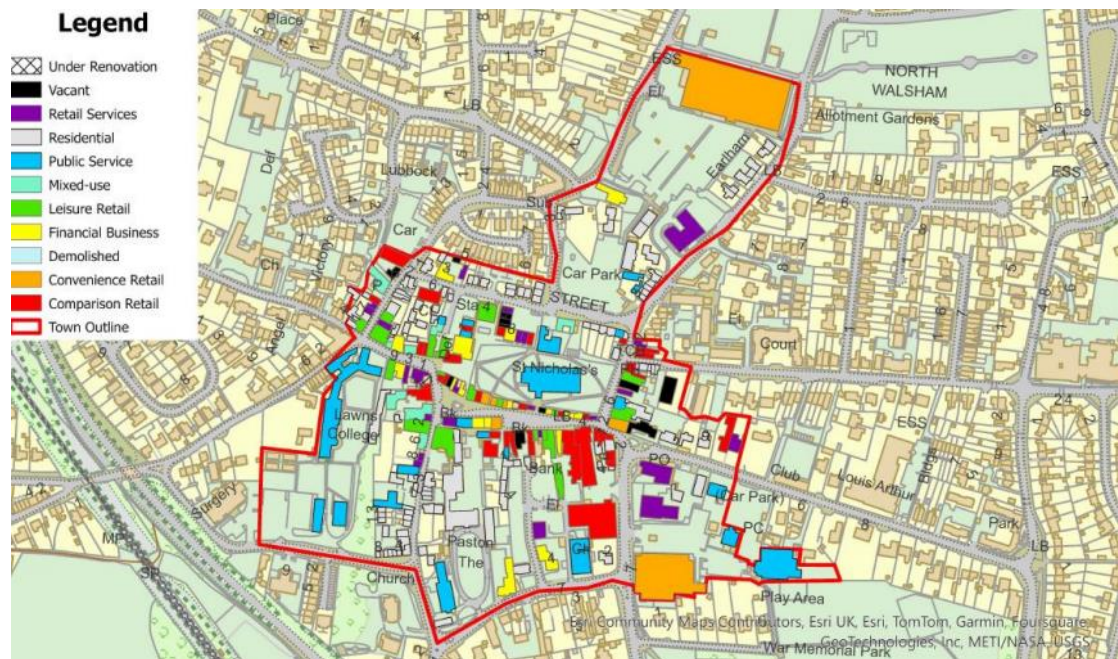


Figure 16 – North Walsham Town Centre by unit type

- 3.7.4 The Market Town Report 2023 also helpfully illustrates the business units by use (see **Figure 16**). An exercise to monitor this is presently being undertaken but was not finalised at the production of this report. Town centre uses in the UK are likely to continue to evolve due to changing consumer habits, economic pressures, and planning reforms—particularly around permitted development rights. It is therefore considered that there would be benefit to developing tools to monitor this.
- 3.7.5 Similarly, there is value in monitoring new investment within towns - whether new start-ups, businesses relocating from other locations, or those in smaller existing units upgrading to larger premises. Such investments within a town, even if simply the turnover of existing units, can be a strong indicator of business confidence. North Walsham has seen a number of such investments within the town centre, both during and since the public realm improvements, suggesting a reasonable degree of business confidence. Whilst not exhaustive, the list of new investments includes:
- Catharsis
 - Scrumptious Bakes
 - The Mortgage Point
 - Phoenix Group (former Barclays)
 - Bupa Dental

- Peasants Tavern
- The Craft Bakery
- Morisons Daily
- Coffeesmiths
- Dolly's Gifts and Home
- Norfolk Raws
- The Market Plaice Chippy

3.7.6 In addition, following its restoration through the HSHAZ project, the Cedars Building is presently at 100% (of available) capacity. Presently this is occupied by North Walsham Town Council, Norfolk County Council Registrars, an Independent Financial Advisors and a software developer.

3.8 Public Transport Patronage

Monitoring public transport (train and bus) usage is a powerful tool in assessing town centre health, especially when considered alongside footfall data. Desirably we want our towns to become more sustainable, with people adopting different modes of transport (including walking and cycling), with trains and buses being the easiest to monitor. Desirably, we would seek to better understand the destinations, frequency of movement, and the inbound/outbound data to see the net gain or loss - are people leaving the town to go to work elsewhere or coming into the town for work/to visit?

Number of tickets (outbound and inbound tickets counted separately)

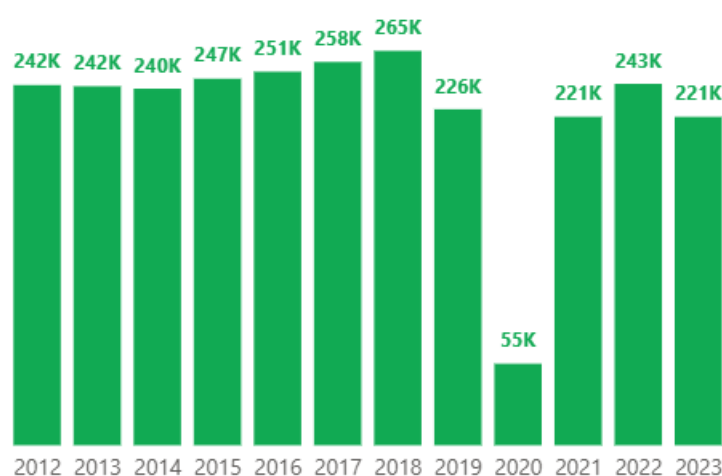


Figure 17 – Train Station footfall by year

- 3.8.1 **Figure 17** illustrates the footfall data for North Walsham train station (inbound and outbound). Whilst unfortunately the present data set is limited to financial year end 2023, the data shows a substantial fall in 2020 – almost certainly as a consequence of the pandemic – with a degree of recovery in 21-23, although not to the 2018 high.
- 3.8.2 There would be value in pursuing additional trainline data in order to get a broader picture. Similarly, there would be benefit in obtaining data on bus patronage, although it is understood that there has been some hesitancy around the provision of this due to potential commercial sensitivities. Nevertheless, it would be anticipated that North Walsham will have likely seen an uplift in bus usage, with the investment in the new 'Travel Hub' on New Road

coinciding with the Government's bus fare caps (£2 – January 2023-December 2024 and £3 since January 2025). Notably, the X55 bus service in North Walsham has seen an increase in frequency and service enhancements in 2025, aimed at improving connectivity between North Walsham and Norwich.

4. Corporate Priorities

- 4.1 The recommendations of this report align with the following objectives of the Corporate Plan: 'Investing in Our Local Economy & Infrastructure' (*An environment for business to thrive in & Infrastructure to Support Growth*) – specifically the objective: *working with our Market and Resort Towns to reinforce their roles as local service centres, centres of employment, financial services and business activity, served by public transport*; as well as 'Developing Our Communities' (*Increase accessibility and inclusion for all*).

5. Financial and Resource Implications

- 5.1 There are no financial or resource implications immediately arising from this report. The Council has a dedicated Corporate Data Analyst within the Corporate Programme & Project Management team. It is suggested that the Council continues to develop and refine town centre health monitoring using existing resources.

Comments from the S151 Officer:

The report does not have financial implications

6. Legal Implications

- 6.1 There are no identified legal implications arising from this report.

Comments from the Monitoring Officer

No comment provided

7. Risks

- 7.1 There are no identified risks arising from this report

8. Net ZeroTarget

- 8.1 *The Council's Net Zero Strategy & Action Plan requires all decisions to be assessed and tested for consistency against the Net Zero 2030 Strategy & Climate Action Plan. The details of this report and its recommendation have no direct immediate on delivery against this strategy.*

9. Equality, Diversity & Inclusion (EDI)

- 9.1 The Council is committed to promoting equality of opportunity for the people and communities of north Norfolk. We respect and value difference in our communities and across our own workforce. We want everyone to feel included and able to play their part in making north Norfolk the best place to live, learn work and visit. Improving how the Council monitors town centre health will assist the Council in proposing any future interventions that support inclusiveness and accessibility.

10. Community Safety issues

- 10.1 There are no identified community safety issues arising from this report.

11. Conclusion and Recommendations

- 11.1 This report uses a methodology for monitoring the health and vitality of north Norfolk town centres. Within this framework it considered how North Walsham town centre has fared since the end of the North Walsham High Street Action Zone (HSHAZ) programme. Against these key measures, arguably North Walsham has fared well, observing increased footfall and car park usage, and demonstrated business confidence through new investments in the town, including the Cedars building, which was an important deliverable of the programme.

- 11.2 In July 2024, the Committee considered the evaluation report that was prepared at the closure of the programme. The report outlined some of the lessons learnt from the delivery of the programme. However, one of the key lessons drawn out by the Committee was that, at the point of submitting the bid to Historic England, the baseline position for many of the key indicators of town centre vitality for North Walsham were not understood. Subsequently efforts have been made, demonstrated within this report, to improve the Council's understanding. Very recent improvements to key data sources – which are presently being reviewed – will assist further in refining this, including better understanding of comparative data (local, regional, national), trend analysis (to help highlight the success of interventions/'red flag' concerns) and monitoring new unit take up. It is also acknowledged, although not the focus of this report, that a 'healthy' town is not simply about economic factors, and could include indicators such as health & wellbeing, social & community, environmental and accessibility.

- 11.3 The Overview & Scrutiny Committee are recommended to:

1. Note the contents of the report recognising the contribution the HSHAZ programme made to the achievement of key Corporate Plan objectives.
2. Provide any feedback in relation to the proposed framework for town centre health monitoring, which builds further on some of the positive work already undertaken to profile north Norfolk town centres.