

Norwich City Centre Shopping Floorspace Monitor & Local & District Centres Monitor



| August 2013

Contents:

1. Introduction
2. Main findings
3. City centre overview (Table 1)
4. The primary shopping area:
 - a. A1 retail floorspace (Table 2)
 - b. Retail frontage zones (Table 3)
5. The secondary shopping area:
 - a. A1 retail floorspace (Table 4)
6. The large district centre:
 - a. All large district centres (Table 5a)
 - b. LD01 only (Magdalen Street / Anglia Square) (Table 5b)
7. The rest of the City (Table 6)
8. Local and District Centres
9. Supporting Maps:
 - a. Primary shopping area (Map 1)
 - b. Primary area frontage groups (Map 2)
 - c. Secondary shopping areas (Map 3)
 - d. Large district centre (Map 4)
10. Contact Information

1. Introduction:

Policy Changes:

1. Since the last city centre shops monitor there have been significant changes in national retail policy. Section 2 of the National Planning Policy Framework (NPPF): Ensuring the vitality of town centres has replaced PPS6: Planning for Town Centres.
2. Section 2 of the NPPF states that planning policies should be positive, promote competitive town centre environments, provide for customer choice and a diverse retail offer, and reflect the individuality of town centres.
3. The Joint Core Strategy (JCS) was adopted in March 2011. Policy 11: Norwich City Centre states that the retail, cultural and leisure facilities offered in the city will be expanded and enhanced through intensification of retail uses and expansion of the retail area if necessary.
4. Policy 11 also amended the role of two retail destinations: Riverside retail area was re-designated from the primary retail area to a Large District Centre, and Brazengate (Sainsbury's store) was re-designated from the primary retail area to the secondary retail area.

The Portas review:

5. In addition to national policy changes the independent Portas review of 2011 made several recommendations to enable local authorities to help protect and improve the retail vitality and viability of their high streets. The review advocated regular monitoring to enable authorities to keep a check on the health of their high streets.
6. The recommendations made by Portas were, in general, already being implemented in Norwich.

Norwich: An Overview:

7. Norwich is a thriving retail and visitor destination of regional significance and, in terms of retail spend and attractiveness, among the top fifteen nationally. The city centre is the most accessible and sustainable location for retail, leisure, office, cultural and tourism related development.
8. Retail uses are critical in underpinning the city centre's continued vitality and viability; however an appropriate diversity of other town centre uses such as restaurants, cafes, financial services, leisure and cultural uses and office based employment help support the economic vitality and health of the city centre, for people of all ages throughout the day and evening.

9. Regular monitoring of change in retail frontages ensures that any thresholds applied remain relevant and necessary. The survey data reported here was collected in August 2013. This report updates the key data from the January 2011 Norwich floorspace monitor.
10. Conclusions and main issues will also form part of the Annual Monitoring Report published by the Greater Norwich Development Partnership (GNDP)¹. These conclusions also inform the policy direction set in the emerging Development Management Policies Development Plan Document (DM Policies DPD).

2. Main Findings:

General:

11. The situation is generally very good with regard to retail vacancies, both in comparison to the vacancy rate in Norwich in recent years and to the national picture.
12. The vacant available floorspace in the city centre within the defined frontages is 5.3%. This has reduced significantly from the worst figure of over 12% in 2010 and it is now at broadly the same level as the pre recession rate in 2007. This compares to a national average of 14.1% (Local Data Company – June 2013), although direct comparison with national rates is difficult due to methodological differences in different surveys.
13. In the primary retail area the vacancy rate is 6.2%. This has reduced from a peak vacancy rate of 11.7% in 2010, but remains higher than the 2007 rate of 2.8%.
14. The secondary area rate is 3.3%, lower than both the peak vacancy rate of 6.6% in 2010 and the 2007 rate of 4.1%. This shows that smaller independent shops in areas like the Norwich Lanes and St. Benedict's Street are thriving despite the recession.
15. The figure of 1% for large district centres (LDC) is extremely low. However, due to the re-designation of the Riverside retail area to an LDC through the Joint Core Strategy in 2011, it is not possible to make a meaningful comparison with previous figures. Riverside has a strong offer as a retail destination with historically low vacancy rates.
16. Taking LD01: Magdalen Street/Anglia Square into consideration on its own, vacancy rates are down significantly to 7.1%, from 18.1% in 2011. This is a very positive trend in an area where vacancies have been very high for a long

¹ The GNDP is made up of Broadland District Council, Norwich City Council and South Norfolk District Council, working in partnership with Norfolk County Council and The Broads Authority.

time, with a 2007 pre recession rate of 16.9%. There has also been a reduction in the total number of units overall (down by 29) but an increase in total floorspace (up by 831sqm), suggesting units are merging and expanding to take in adjacent vacant units. The reduced vacancy rates are likely to result from the recent environmental improvements in St. Augustine's Street, an increase in the number of dwellings, population and ethnic diversity in the area and economic changes supporting the growth of arts and design based uses, a number of which have located in St. Augustine's Street.

17. The recent trend of a reduction in total retail floorspace in the city centre overall has continued, with a reduction of 0.1% over the two and a half years since the last survey. This is in keeping with previous years but can presently be explained by the change in policy in the JCS in 2011 to allow more flexibility of uses in the city centre to encourage the development of other city centre functions such as cafes and restaurants to support retail strength and the early evening economy function of the primary retail area. This is also reflected in the figures in paragraphs 19 and 20 below which show a decline in the proportion of retail units in several frontage groups.
18. Although a reduction in retail floorspace runs counter to the aim of Policy 11: Norwich City Centre of the JCS to increase the amount of retailing in the city centre, it is in support of the aim to increase other uses such as the early evening economy, employment and cultural and visitor functions.

Retail Frontages:

19. For the purposes of saved local plan policy SHO10 the primary area is subdivided into a number of smaller 'frontage zones' (as defined on the proposals map). The 85% retail threshold is calculated with reference to the total length of ground floor frontage within the zone concerned. This method of measurement takes account of the fact that the main impact on vitality of the street is the display area of shop windows, not necessarily the floorspace.
20. The percentage of retail compared to non-retail has *decreased* in 3 defined frontages:
 - a. PR01: 82.1% falling to **81.5%**
 - b. PR03: 82.1% falling to **71%** and;
 - c. PR07: 98.8% falling to **97.2%**
21. The significant drop in retail uses in defined frontage PR03 is as a result of the planning permission for a Jamie's Italian restaurant in the Royal Arcade. This unit has a significant frontage length of 37.3m in a total frontage length of 743.1m, accounting for just over 5% of the total frontage. At the time of the application the frontage was already in excess of its threshold of 15% non-retail but the proposed use was considered to be one which would add to the vitality and viability of the street scene and contribute to the aim of Policy 11 of the JCS to promote early evening economy uses in the city centre.

22. Four of the seven defined frontages have *exceeded* the policy threshold of 15% non-retail:

- a. PR01 by **2.9%** (17.9%)
- b. PR02 by **0.7%** (15.7%)
- c. PR03 by **2.9%** (17.9%) and;
- d. PR05 by **3.6%** (18.6%)

Local and District Centres:

23. Vacancy rates in district and local centres have increased slightly from 2010 and are now 8.7% and 9.7% respectively. See Section 8 for further detail.

3. City Centre Overview:

Table 1

Norwich city centre – provision of A1 retail floorspace (totals) (sqm net ²)				
	<i>ALL</i>	<i>TRADING</i>	<i>VACANT</i>	<i>REFURBISHMENT</i>
TOTAL FLOORSPACE				
August 2013	224,109	208,779	11,849	3,481
January 2011	227,377	203,948	21,035	2,394
July 2010	227,949	198,379	28,315	1,255
January 2010	228,432	206,379	21,810	243
July 2009	229,509	208,674	20,579	256
July 2007	229,888	214,223	11,998	3,667
TOTAL SHOP UNITS				
August 2013	1054	936	97	21
January 2011	1067	949	108	10
July 2010	1070	938	121	11
January 2010	1079	948	126	5
July 2009	1086	955	128	3
July 2007	1091	980	96	15
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE ((Vacant + Refurbishment) / All x 100)	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE³ (Vacancy / All x 100)	VACANCY AS A PROPORTION OF ALL SHOP UNITS ((Vacant + Refurbishment) / All x 100)
August 2013		6.8%	5.3%	11.2%
January 2011		10.3%	9.3%	10.1%
July 2010		13.0%	12.4%	11.3%
January 2010		9.7%	9.5%	11.7%
July 2009		9.1%	9.0%	11.8%
July 2007		6.8%	5.2%	8.8%
OVERALL RETAIL FLOORSPACE CHANGE				
Since January 2011	Decreased by 3,268sqm: 0.1% (over 2.5 years)			
Since July 2010	Decreased by 0.3%			
Since July 2007	Decreased by 1.1%			

² Net floorspace represents the area of the public retail sales area, excluding non-public areas, staff rooms, toilets, circulation, servicing and storage. Public restaurants and cafes within shops are treated as ancillary to the main retail use and included in the net floorspace figure. Where precise measurements are not available, net floorspace has been estimated, normally regarded as between 60% and 65% of the total floor area (gross floorspace) of the shop unit.

³ Not counting space which is under construction or refurbishment.

4. The primary shopping area:

Table 2:

Primary shopping area (excluding Riverside as removed by JCS Adopted March 2011) – A1 retail floorspace (sqm net)				
	<i>ALL</i>	<i>TRADING</i>	<i>VACANT</i>	<i>REFURBISHMENT</i>
TOTAL FLOORSPACE				
August 2013	152,497	141,705	9,382	1,410
January 2011	173,789	157,817	13,967	2,005
July 2010	174,252	153,199	20,448	605
January 2010	174,525	160,541	13,909	75
July 2009	175,256	162,962	12,294	0
July 2007	175,383	167,340	4,910	3,133
TOTAL SHOP UNITS				
August 2013	567	490	72	5
January 2011	574	524	45	5
July 2010	576	513	58	5
January 2010	578	524	53	1
July 2009	581	524	57	0
July 2007	590	541	44	5
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE <i>((Vacant + Refurbishment) / All x 100)</i>	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE ⁴ <i>(Vacancy / All x 100)</i>	VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i>
August 2013		7.1%	6.2%	13.6%
January 2011		9.2%	8.0%	7.8%
July 2010		12.1%	11.7%	10.1%
January 2010		8.0%	8.0%	9.2%
July 2009		7.0%	7.0%	9.8%
July 2007		4.6%	2.8%	7.5%

The amount of floorspace and number of units in the primary retail area has fallen due to the amendment of the role of Albion Way, Riverside and Brazengate in the JCS. Both these areas have been removed from the primary retail area resulting in a loss of 19,985sqm.

⁴ Not counting space which is under construction or refurbishment.

Table 3:

PRIMARY AREA RETAIL FRONTAGE ZONES						
Showing incidence of non-retail uses (at August 2013 compared to January 2011)						
FRONTAGE ZONE⁵	TOTAL MEASURED FRONTAGE (M)	TOTAL NON-RETAIL FRONTAGE (AUG 13)	TOTAL NON-RETAIL FRONTAGE (JAN 11)	% A1 RETAIL / NON A1 RETAIL SPLIT (AUG 13) (Frontage)	% A1 RETAIL / NON A1 RETAIL SPLIT (JAN 11) (Frontage)	SHO10 POLICY THRESHOLD EXCEEDED?
PR01: London Street West	953.3	176.5	171.3	81.5% / 18.5%	82.1% / 17.9%	Yes
PR02: Gentleman's Walk / Market	922.1	143.7	144.9	82.6% / 17.4%	84.3% / 15.7%	Yes
PR03: Back of the Inns	743.1	215.9	133.3	70.9% / 29.1%	82.1% / 17.9%	Yes
PR04: Castle Mall	917.6	38.3	38.3	95.8% / 4.2%	95.9% / 4.1%	
PR05: Timberhill / Westlegate	548.7	95.1	97.3	82.7% / 17.3%	81.4% / 18.6%	Yes
PR06: St. Stephens Street	583.5	62	88.0	89.4% / 10.6%	85.6% / 14.4%	
PR07: Chapelfield	686	19.5	8.5	97.2% / 2.8%	98.8% / 1.2%	

⁵ See Section 9 for definitions and maps.

5. Secondary shopping areas:

Table 4:

Secondary Shopping Areas - A1 retail floorspace (sqm net)				
	ALL	TRADING	VACANT	REFURBISHMENT
TOTAL FLOORSPACE				
August 2013	21,926	21,083	715	131
January 2011	17,785	16,612	878	295
July 2010	17,980	16,709	1,107	164
January 2010	18,076	16,788	1,189	99
July 2009	18,262	17,008	1,207	47
July 2007	18,151	17,069	752	330
TOTAL SHOP UNITS				
August 2013	187	176	9	2
January 2011	190	174	13	3
July 2010	192	173	16	3
January 2010	194	173	18	3
July 2009	196	173	22	1
July 2007	193	175	11	7
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE <i>((Vacant + Refurbishment) / All x 100)</i>	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE⁶ <i>(Vacancy / All x 100)</i>	VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i>
August 2013		3.9%	3.3%	5.9%
January 2011		6.6%	4.9%	6.8%
July 2010		7.1%	6.2%	8.3%
January 2010		7.1%	6.6%	9.3%
July 2009		6.9%	6.6%	11.2%
July 2007		6.0%	4.1%	5.7%

The secondary retail area has increased in size following the amendment to the role of Brazengate by policy 11 of the JCS. This has increased the floorspace by 4,321sqm.

⁶ Not counting space which is under construction or refurbishment.

6. Large district centres:

Table 5a:

Magdalen Street / St Augustine's Street / Anglia Square / Albion way (Riverside) – A1 Retail floorspace (sqm net)				
	ALL	TRADING	VACANT	REFURBISHMENT
TOTAL FLOORSPACE				
August 2013	32,602	31,256	301	1,045
January 2011	18,314	14,934	3,311	69
July 2010	18,218	14,947	3,202	69
January 2010	18,239	14,811	3,359	69
July 2009	18,289	15,049	3,031	209
July 2007	18,126	15,030	3,057	39
TOTAL SHOP UNITS				
August 2013	77	67	7	3
January 2011	135	107	27	1
July 2010	134	109	24	1
January 2010	135	106	28	1
July 2009	136	112	22	2
July 2007	136	111	23	2
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE <i>((Vacant + Refurbishment) / All x 100)</i>	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE ⁷ <i>(Vacancy / All x 100)</i>	VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i>
August 2013		4.1%	1%	13%
January 2011		18.5%	18.1%	20.0%
July 2010		18.0%	17.6%	17.9%
January 2010		18.8%	18.4%	20.7%
July 2009		17.7%	16.6%	16.2%
July 2007		17.1%	16.9%	16.9%

JCS Policy 11 amended the role of Albion Way, Riverside to a Large District Centre which accounts for the increase in floorspace and reduction in vacancy as a proportion of total floorspace, available floorspace and shop units. Therefore it is not possible to make a meaningful comparison with previous vacancy figures – see table 5b below.

⁷ Not counting space which is under construction or refurbishment.

Table 5b: LD01: Magdalen Street / Anglia Square only

Magdalen Street / St Augustine's Street / Anglia Square /				
	ALL	TRADING	VACANT	REFURBISHMENT
TOTAL FLOORSPACE				
August 2013	19,145	17,595	1,350	200
January 2011	18,314	14,934	3,311	69
July 2010	18,218	14,947	3,202	69
January 2010	18,239	14,811	3,359	69
July 2009	18,289	15,049	3,031	209
July 2007	18,126	15,030	3,057	39
TOTAL SHOP UNITS				
August 2013	106	99	6	1
January 2011	135	107	27	1
July 2010	134	109	24	1
January 2010	135	106	28	1
July 2009	136	112	22	2
July 2007	136	111	23	2
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE <i>((Vacant + Refurbishment) / All x 100)</i>	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE⁸ <i>(Vacancy / All x 100)</i>	VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i>
August 2013		8.1%	7.1%	6.6%
January 2011		18.5%	18.1%	20.0%
July 2010		18.0%	17.6%	17.9%
January 2010		18.8%	18.4%	20.7%
July 2009		17.7%	16.6%	16.2%
July 2007		17.1%	16.9%	16.9%

Figures in this table enable a meaningful comparison to be made with previous vacancy figures, showing a positive trend for a significant reduction in vacancies which had previously been very high, even pre recession.

⁸ Not counting space which is under construction or refurbishment.

7. Rest of city centre:

Table 6:

Rest of city centre – A1 Retail floorspace (sqm net)				
	<i>ALL</i>	<i>TRADING</i>	<i>VACANT</i>	<i>REFURBISHMENT</i>
TOTAL FLOORSPACE				
August 2013	17,084	14,738	920	1,426
January 2011	17,400	14,495	2,880	25
July 2010	17,500	13,524	3,559	417
January 2010	17,593	14,240	3,353	0
July 2009	17,702	13,655	4,047	0
July 2007	18,223	14,784	3,279	165
TOTAL SHOP UNITS				
August 2013	157	137	12	8
January 2011	168	144	23	1
July 2010	192	167	23	2
January 2010	172	145	27	0
July 2009	173	146	27	0
July 2007	172	153	18	1
OVERALL SHOP VACANCY RATE		VACANCY AS A PROPORTION OF ALL FLOORSPACE <i>((Vacant + Refurbishment) / All x 100)</i>	VACANCY AS A PROPORTION OF AVAILABLE FLOORSPACE⁹ <i>(Vacancy / All x 100)</i>	VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i>
August 2013		13.7%	5.4%	12.7%
January 2011		16.7%	16.6%	13.7%
July 2010		22.7%	20.3%	12.0%
January 2010		19.1%	19.1%	15.7%
July 2009		22.9%	22.9%	15.6%
July 2007		18.9%	18.0%	10.5%

⁹ Not counting space which is under construction or refurbishment.

8. Local and District Centres:

24. The survey was taken at the same time as the city centre survey in August 2013.

25. Policy SHO15 of the Replacement Local Plan states:

Within the District and Local Centres, as defined on the Proposals Map, proposals for change of use from class A1 to other uses will only be permitted where;

- (i) the proportion of class A1 uses in the defined centre would not fall below 60% as a result; or*
- (ii) the proposed use provides a service appropriate to the centre's position in the hierarchy, which is underrepresented in that centre or is a community use and there are no other units available in or adjacent to the centre, in which such a use could be accommodated.*

Vacancy rates:

26. In district centres, out of the 127 units, in the 7 district centres, the number of vacant units **remained** at 8, the same as at January 2011.

27. The worst 2 performing district centres are DC06 – Earlham House and DC07 – The Larkman.

28. Earlham House is currently undergoing significant regeneration works to improve the surrounding housing, access and parking facilities.

29. The Larkman has 3 large convenience stores within the total units; The Coop (133sqm) and Aldi (790sqm), and L&K Convenience Store and Post Office (190sqm). Each of these convenience goods based units will impact upon smaller units, evident in the high vacancy rate of 14.3%.

District Centre	Anchor Store	No of vacant units / of total units
DC01 – Bowthorpe	Roys	1 / 17 – 5.6%
DC02 – Drayton Road	Lidl	0 / 15 – 0%
DC03 – Eaton	Waitrose	0 / 16 – 0%
DC04 – Plumstead Road	Tesco / Aldi – Co-op	1 / 27 – 3.4%
DC05 – Aylsham Road	Co-op	1 / 23 – 4.4%
DC06 – Earlham House	Co-op	3 / 17 – 17.6%
DC07 – The Larkman	Co-op / Aldi	2 / 14 – 14.3%

30. In local centres, out of the 319 units in the 25 local centres, the number of vacant units **increased** from 30 to **31** representing a vacancy rate of **9.7%**, an increase from 2001 when 8.2% was recorded.

Non-retail units:

31. Of the 129 units in the district centres, the percentage of non-retail units **decreased** to **41.9%** compared to 2011 when 43.7% was recorded. The SHO15 policy threshold was exceeded in the following district centres:
- a. DC01: Bowthorpe Centre
 - b. DC03: Eaton Centre
 - c. DC04: Plumstead Road Centre
 - d. DC05: Aylsham Road / Mile Cross centre, and;
 - e. DC07: The Larkman centre.
32. These are the same centres as recorded in January 2011 and July 2010.
33. Of the 318 units in the 25 local centres, the percentage of non-retail units **decreased** to **40.6%** from 43.5%. The SHO15 policy threshold was exceeded in the following district centres:
- a. LC02: Hall Road / Queens Road
 - b. LC03: Hall Road / Southwell Road
 - c. LC05: Suffolk Square
 - d. LC06: Unthank Road
 - e. LC07: St Augustine's Gate
 - f. LC10: Aylsham Road / Glenmore Gardens
 - g. LC12: Woodcock Road
 - h. LC15: Sprowston Road
 - i. LC16: Sprowston Road / Shipfield
 - j. LC18: Earlham West Centre, and;
 - k. LC20: Colman Road, The Parade.
34. LC01: Hall Road / Trafalgar Street and LC17: Bishop Bridge Road no longer record in excess of 40% non-retail, however, since January 2011 LC05: Suffolk Square is new to the above list.
35. The following local centres are recorded as having 40% non-retail so are flagged as likely to exceed the policy threshold:
- a. LC08: Dereham Road / Distillery Square
 - b. LC14: Magdalen Road, and;
 - c. LC25: Heartsease, Clancy Road.

9. Supporting Maps:

a. Primary shopping area:



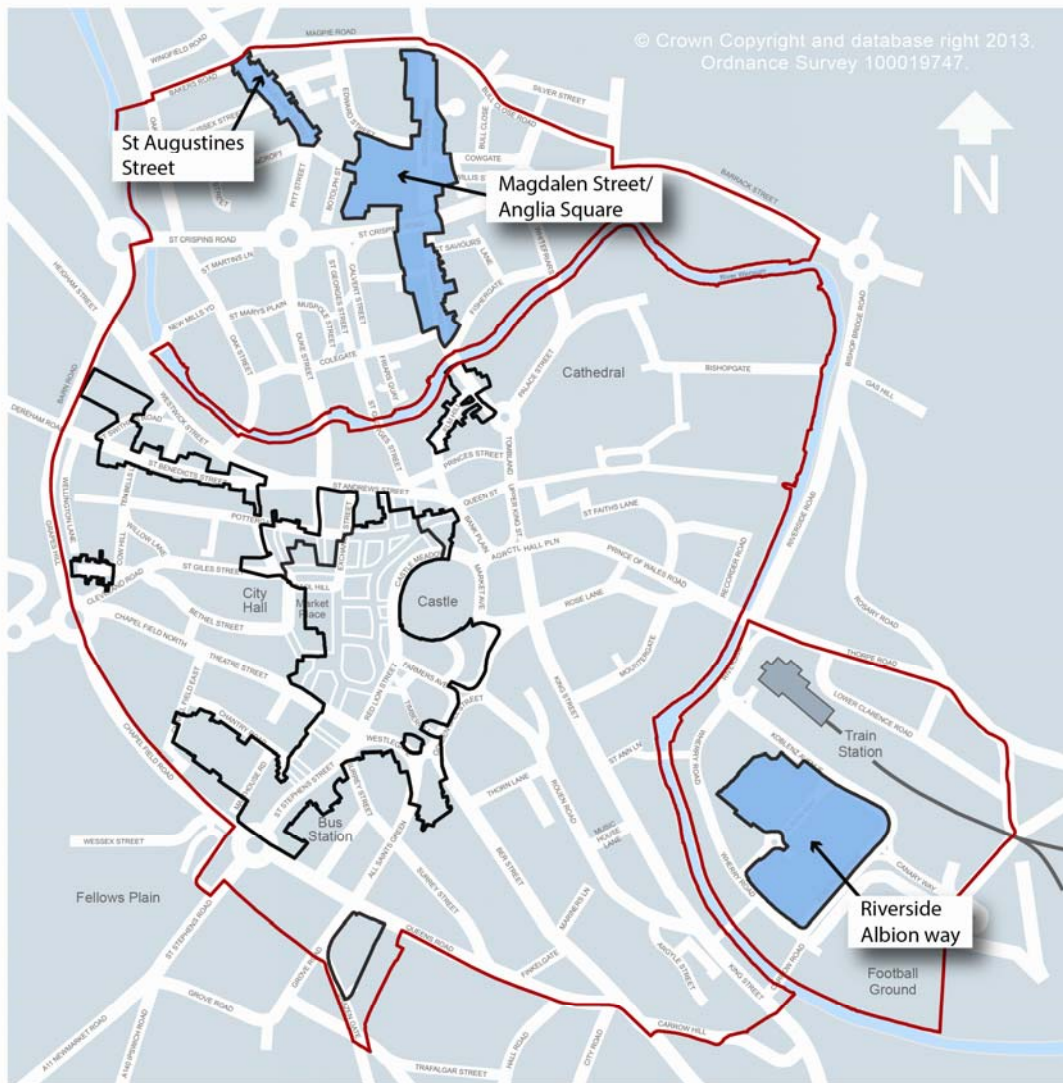
b. Primary area frontage groups:



c. Secondary shopping areas:



- d. Large district centre (Magdalen Street / Anglia Square / St Augustine's Street / Albion Way (Riverside))



9. Contact Information:

Further information can be obtained by writing to:

Planning services,
Norwich City Council
City Hall
St Peter's Street
Norwich
NR2 1NH

Alternatively you can e-mail us at:

ldf@norwich.gov.uk

Or call us on:

0344 980 3333

Contact officers for this report are:

Sarah Ashurst

Tel: 01603 212500

E-mail: sarahashurst@norwich.gov.uk