

Norwich Local Development Framework

Norwich city centre shopping floorspace monitor

January 2011

The survey data was collected in January 2011. This report updates the key data from the July 2011 Norwich city centre shopping floorspace monitor. Conclusions and main issues will also form part of the Annual Monitoring Report.

The January 2011 data is compared with the following:

- July 2010 (short term changes)
- July 2007 (pre-recession)

The main findings of this retail monitor are:

- An overall reduction in the percentage of vacant available floorspace in the whole of the city centre from 12.4% to 9.3%. This compares to 5.2% vacant available floorspace in 2007, before the current recession took effect;
- This compares to a national average of 14.5% (Local Data Company, 2011);
- A slight reduction in the amount of total floorspace from 227, 949 square metres (sq.m.) to 227,377sq.m. (0.3% reduction);
- A reduction in vacant units in the primary retail area from 10.1% to 7.8%;
- An increase in the vacancy rates on the Large District Centre of Magdalen Street, St Augustine's Street and Anglia square from 17.6% to 18.1% of available floorspace.

City centre overview

TABLE 1 NORWICH CITY CENTRE PROVISION OF A1 RETAIL FLOORSPACE (totals) square metres net ⁽¹⁾				
Total floorspace	ALL	Trading	Vacant	Construction
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				
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				
		Proportion of all floorspace	Proportion of available floorspace⁽²⁾	Proportion of shop units
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 July 2010		Decreased by 0.3%		
Since July 2007		Decreased by 1.1%		
<small>(1) 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 cafés within shops are treated as ancillary to the main retail use and included in the net retail 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.</small>				
<small>(2) Not counting space which is under construction or refurbishment</small>				

The primary shopping area

TABLE 2 PRIMARY SHOPPING AREA (includes Riverside) A1 RETAIL FLOORSPACE square metres net				
Total floorspace	ALL	Trading	Vacant	Construction
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	Nil
July 2007:	175,383	167,340	4,910	3,133
Total shop units				
January 2011	574	524	45	5
July 2010	576	513	58	5
January 2010	578	524	53	1
July 2009	581	524	57	Nil
July 2007:	590	541	44	5
Overall shop vacancy rate		Proportion of all floorspace	Proportion of available floorspace ⁽¹⁾	Proportion of shop units
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%

⁽¹⁾ Not counting space which is under construction or refurbishment

TABLE 3**PRIMARY AREA RETAIL FRONTAGE ZONES**

showing incidence of non-retail uses (at January 2011)

Frontage Zone (see appendices for definitions and plan)	Total measured ground floor frontage (m)	Total non-retail frontage (m)	Percentage A1 retail/ non-A1 retail split	SHO10 Policy Threshold Exceeded? (min 85%)
PR01 London Street West	955.6	171.3	82.1% / 17.9%	Yes
PR02 Gentlemans Walk/Market	922.1	144.9	84.3% / 15.7%	Yes
PR03 Back of the Inns	743.3	133.3	82.1% / 17.9%	Yes
PR04 Castle Mall	929.1	38.3	95.9% / 4.1%	No
PR05 Timberhill/Westlegate	522.1	97.3	81.4% / 18.6%	Yes
PR06 St Stephens Street	609.5	88.0	85.6% / 14.4%	No
PR07 Chapelfield	701.5	8.5	98.8% / 1.2%	No

Note: The only change in the past 6 months was the increase of non-retail uses in Back of the Inns from 16.4% to 17.9%.

Secondary shopping areas

**TABLE 4
SECONDARY SHOPPING AREAS
A1 RETAIL FLOORSPACE
square metres net**

Total floorspace	ALL	Trading	Vacant	Construction
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				
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		Proportion of all floorspace	Proportion of available floorspace ⁽¹⁾	Proportion of shop units
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%

⁽¹⁾ Not counting space which is under construction or refurbishment

Large district centre

(Magdalen Street/ St Augustines Street/ Anglia Square)

TABLE 5
MAGDALEN STREET / ST AUGUSTINES STREET / ANGLIA SQUARE
A1 RETAIL FLOORSPACE
 square metres net

Total floorspace	ALL	Trading	Vacant	Construction
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				
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		Proportion of all floorspace	Proportion of available floorspace⁽¹⁾	Proportion of shop units
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%

⁽¹⁾ Not counting space which is under construction or refurbishment.

Rest of the city centre

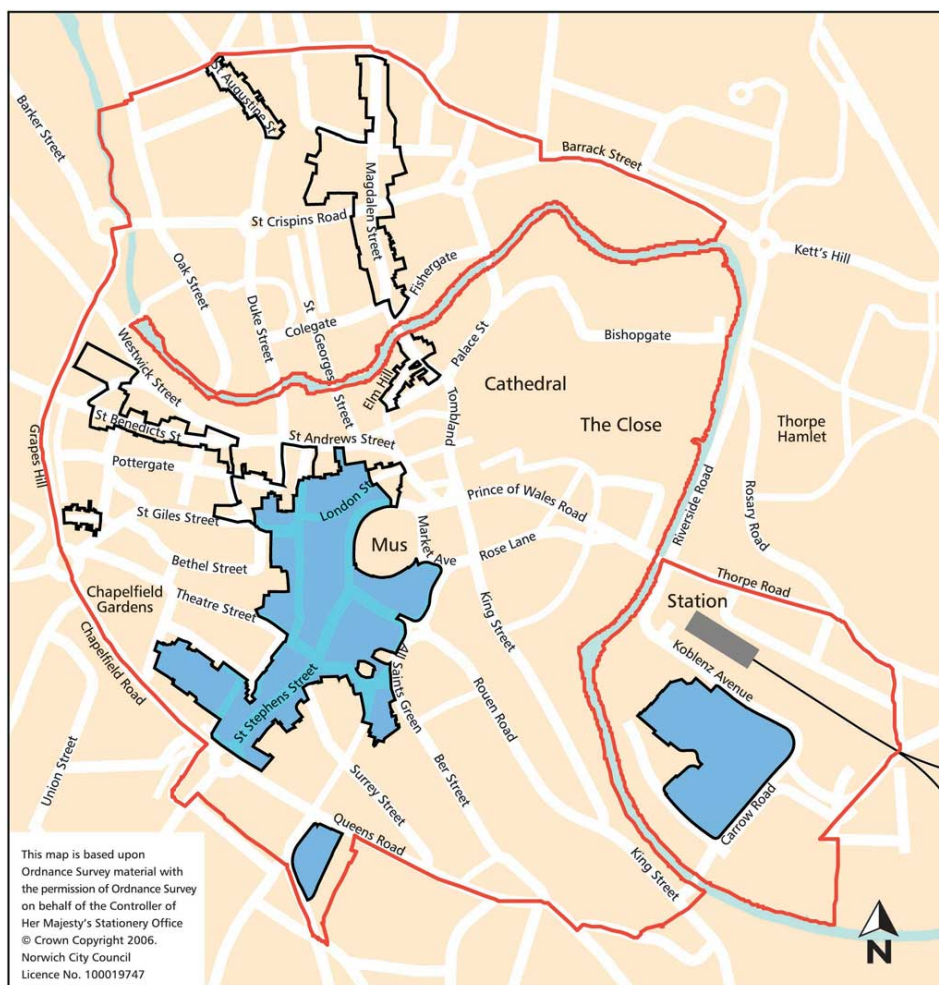
TABLE 6
REST OF CITY CENTRE
A1 RETAIL FLOORSPACE
square metres net

Total floorspace	ALL	Trading	Vacant	Construction
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	Nil
July 2009	17,702	13,655	4,047	Nil
July 2007	18,228	14,784	3,279	165
Total shop units				
January 2011	168	144	23	1
July 2010	192	167	23	2
January 2010	172	145	27	Nil
July 2009	173	146	27	Nil
July 2007	172	153	18	1
Overall shop vacancy rate		Proportion of all floorspace	Proportion of available floorspace ⁽¹⁾	Proportion of shop units
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%

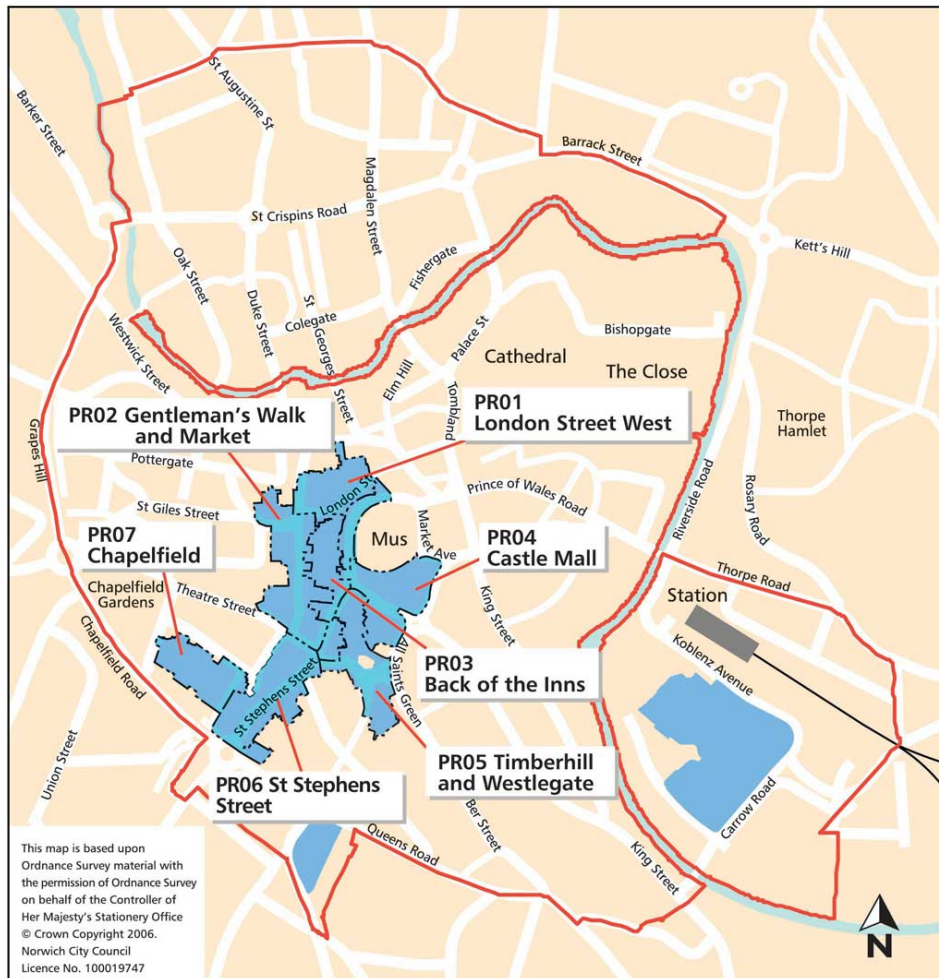
⁽¹⁾ Not counting space which is under construction or refurbishment.

Definition of shopping areas within Norwich city centre

Primary shopping area



Primary area frontage groups



Secondary shopping areas



Large district centre

(Magdalen Street/Anglia Square/St Augustines Street)



Contact information

Further information can be obtained by writing to planning services, Norwich City Council, City Hall, Norwich, NR2 1NH or by contacting the planning policy and projects team by telephone or email.

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