Norwich Local Development Framework

Norwich City Centre Shopping Floorspace Monitor

January 2007

NORWICH
City Council

Contents


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Executive Summary

This report presents the results of the City Council's six-monthly survey of vacant shops and shopping floorspace in the pipeline in Norwich City centre. The survey was undertaken during January 2007.

The information collected for this report helps to monitor how well the City centre is performing in retail terms and how effective the Council's planning policies have been in managing new retail development, growth and change.

Key Findings

The **total retail floorspace stock** in the City centre remains broadly unchanged at 230,940 sq. m (2,485,900 sq. ft). 93.5% of floorspace was open for trading in January 2007 (up from 90%). The total number of shop units is up from 1084 to 1095.

The **number of empty shops** in the centre fell from 104 to 97.

The proportion of **vacant retail floorspace** in the centre fell sharply from 8.4% to 5.0%. Two large retail units were reoccupied: Riverside (Currys/Outfit) and London Street (Pilch's) as well as further take-up of shops in Chapelfield, Castle Mall and other parts of the centre.

The Primary Shopping Area
(Is the zone of shopping streets running north to south between St Stephens Street and the Gentleman's Walk/Market Place area and extending east to cover part of London Street and the 'Norwich Lanes'. It

also includes Castle Mall, Chapelfield, Riverside and Brazen Gate (Sainsbury's)).

The **number of empty shops** in the Primary Shopping Area fell from 48 to 40.

The proportion of **vacant retail floorspace** fell from 7.3% to 2.3%, again largely as a result of the take-up of large, previously vacant retail units at Riverside and London Street.

Both covered shopping centres experienced significant take-up of shops: the proportion of **vacant retail floorspace** fell from 8.4% to 3.9% in Castle Mall and from 3.5% to 1.9% in Chapelfield.

Despite the overall recorded fall in the level of vacant floorspace, pockets of vacancy are present in some parts of the Primary Shopping Area, in particular White Lion Street (and elsewhere in the Back of the Inns area) as well as Bridewell Alley in the Lanes.

Secondary Shopping Areas
(Includes much of the western half of the 'Norwich Lanes' area (St Benedict's Street, Pottergate/Lower Gate Lane and Upper St Giles), as well as Elm Hill/Wensum Street and the eastern end of London Street).

The **number of empty shops** in Secondary Shopping Areas increased by only one, rising from 12 to 13 (out of 193).

The proportion of **vacant retail floorspace** showed a small increase from 3.4% to 4.3%, but this is still less than half what it was in 2001.

Magdalen Street, St Augustines Street and Anglia Square

The **number of empty shops** in Magdalen Street/St Augustines Street/Anglia Square showed no change (24 out of 137).

The proportion of **vacant retail floorspace** rose from 17.1% to 19.3%. Most of this change can be attributed to the permanent departure of Looses from 23-25 Magdalen Street (temporarily reoccupied at the time of the last survey in July 2006).

Rest of the City centre

In the rest of the centre outside of the defined shopping areas there has been relatively little change in vacancy levels or development activity. Emerging new development approved at Barrack Street and St Annes Wharf both include an element of new retail provision.

Conclusions

Overall the report paints a positive picture of the health and vitality in Norwich's central shopping area. Changes in shopping patterns occurred following the opening of Chapelfield. As the market responds to this, some parts of the Primary shopping area and Secondary shopping areas nearby, are still adjusting and there are pockets of higher vacancy rates in the City centre. The situation will continue to be closely monitored through these survey reports. There is also a need to address ongoing problems of shop vacancy and perceived decline in the Magdalen Street and St Augustines area through the emerging Northern City Centre Area Action Plan.

Introduction

Purpose of the monitoring report

1 This report examines the level of vacant and approved retail floorspace in the central area of Norwich and provides a general 'health-check' on the overall retail vitality and viability of the centre. This is the third comprehensive survey report on City centre shopping to be produced since the opening of Chapelfield and is a follow-up to a comparable survey undertaken in July 2006.

2 The new system of Local Development Frameworks (LDFs), introduced by the Planning and Compensation Act 2004, places a much greater emphasis on monitoring and review than existed under the previous planning system. There is now a statutory requirement for local planning authorities to publish an Annual Monitoring Report (AMR) to assess progress on the implementation of the Local Development Framework and monitor in detail the amount and types of development approved and built in the previous year. The first AMR for Norwich was published in December 2005 and the second in December 2006.

3 Although retail vacancy surveys do not have to be prepared specifically as part of the AMR process, they provide substantive evidence to put the report in context. More importantly, they help to meet the Government's requirement for local authorities to collect and monitor town centre retail information, as set out in Planning Policy Statement 6 (PPS6) Planning for Town Centres. There is also government guidance that authorities should produce evidence in the form of a Retail Study to assess the prospects for future growth of retail expenditure and demand. For Norwich such a study (for the Norwich sub-region) was commissioned in December 2006 as a joint initiative with Norfolk

County Council, Broadland District Council and South Norfolk Council. The study is being carried out by planning consultants GVA Grimley and is due for completion in June 2007.

4 This report covers PPS6’s requirement for information to be collected in the following areas:

- *diversity of main town centre uses (by number, type and amount of floorspace);*
- *the amount of retail, leisure and office floorspace in edge-of-centre and out-of-centre locations;*
- *proportion of vacant street level property:*
- *state of the town centre environmental quality.*

5 The purpose of the report is, broadly:

(i) To provide reliable and consistent information on the degree of retail vacancy and the distribution of shopping floorspace in the City centre;

(ii) To assess the level of activity in the retail development market;

(iii) To assist in the monitoring and implementation of retail planning policies in the adopted Local Plan and to inform retail policy development in the emerging Norwich Local Development Framework;

(iv) To assist in the Council’s assessment of planning applications involving retail development and to inform decision-making on other corporate initiatives and strategies affecting the central shopping area.

Progress since the last monitoring report

6 Since the last retail survey in July 2006, work on a joint Core Strategy for the three constituent Districts, (City of Norwich, Broadland, South Norfolk), in the Norwich area has now

commenced – this will set a strategic framework for the City Council's detailed planning policies to be prepared subsequently as part of the Local Development Framework.

7 The City Council has made further progress on the Northern City Centre Area Action Plan and a stakeholder forum has been set up that meets on a regular basis to ensure a continuous engagement process in order to develop the plan. The Area Action Plan covers the majority of the City centre to the north of the Inner Ring Road and includes the whole of the Large District Centre retail area defined in the Local Plan (Magdalen Street, Anglia Square and St Augustines Street).

8 Since July the following major developments in the City centre have been implemented:

- Environmental improvements of the public space in St Peters Street adjoining the Provision Market;
- Enhancement works to Dove Street, Bridewell Alley and Swan Lane in the Norwich Lanes area.

The City Council is continuing its integrated programme of environmental improvements to the network of streets and public spaces in the centre as part of the City Centre Spatial Strategy, together with enhancement schemes to the local road network to improve conditions for pedestrians and reduce the impact of vehicular traffic. These initiatives support the Replacement Local Plan's policies to enhance the historic centre, promote a diverse and distinctive shopping environment and encourage a high quality of urban design in new development. They also support the improvement of the environment of City centre as a whole preparing the City for future growth.

Currently underway are environmental improvements to St Andrews Plain outside St Andrews and Blackfriars Hall. This scheme has received substantial funding from a European Union project budget (the ‘Spatial Metro’ project) [1].

9 The January 2007 shop survey recorded a total of **230,940 sq. m** (2,485,362 sq. ft) of class A1 retail floorspace in Norwich City Centre[2] of which **215,890 sq. m** (93.5%) was currently trading and **11,550** sq. m (5%) was vacant. Shop units under construction or undergoing refurbishment account for the remaining 1.4%.

10 Even before Chapelfield opened, Norwich had been placed ninth nationally in Experian’s “Retail Rankings” league table of shopping centres in both 2003 and 2004. The “Retail Footprint” UK retail league table, released by commercial analysts CACI in April 2006, showed Norwich at eighth position (ahead of Liverpool and Newcastle). The CACI ranking, based on the actual volume of retail spending in shopping centres, indicates that Norwich is now generating **£1.17 billion** of retail sales annually, compared with its nearest regional competitors, Cambridge (**£933m**) and Lakeside Thurrock (**£695m**). The “Venuescore” retail destination rankings published by the Javelin Group in August 2006 (using broader indicators of retail diversity and shopping quality) placed Norwich fifth nationally, behind only Glasgow, Birmingham, Edinburgh and Manchester.

11 Whilst the scoring systems in the various retail league tables published by these commercial commentators are not directly comparable, they provide a useful yardstick to measure Norwich’s improved performance against other centres, both in

[1] The Spatial Metro project is part of the ‘Liveable Cities’ initiative which involves a number of other historic cities in the UK and continental Europe. Further information available at www.liveable-city.org and www.spatialmetro.org .
[2] See definitions in Appendix 2.

terms of its commercial vitality and the overall quality of its shopping experience. That Norwich has broken into the top five retail centres in the UK in one of these tables endorses the strategy of the City Council in promoting Norwich as a prestige shopping and visitor destination, while maintaining the breadth and diversity of the shopping offer in the City as a whole.

12 The Secretary of State’s Proposed Changes to the draft East of England Plan were published for consultation in December 2006. The draft Regional Plan continues to recognise the primacy of Norwich as a Key Centre for Development and Change, proposing a new policy for the City to encourage sustainable housing and employment growth (particularly in the city centre), support and enhance the image of Norwich as a ‘contemporary medieval city’ and promote it as a destination for tourists and visitors.

Change in Total Floorspace

13 The total amount of floorspace in the City centre has decreased slightly between July 2006 and January 2007 (by 0.1%), due principally to the removal of two temporary retail outlets at Barrack Street.

14 Between January 2005 and January 2006 the overall shop vacancy rate in the City centre rose from **3.7%** to **8.6%** in terms of floorspace but the July 2006 survey showed that it had fallen again to **8.4%**. The vacancy rate has since fallen significantly to **5%** (significantly less than the national average noted in paragraph 17 on page 17 of this report). As noted in the previous report, a high proportion of the recorded shop vacancy was accounted for by a single large unit – at the Riverside retail park – where 5,574 sq. m (60,000 sq. ft) of space remained vacant after Woolworth's decision to contract their floorspace and re-let part of their Norwich store. This unit has now been re-occupied by both Currys and Outfit. Together with reductions in the vacancy rate elsewhere in the primary area, this has had a significant impact on the overall shop vacancy rate, despite new vacancies elsewhere in the centre.

TABLE 1
NORWICH CITY CENTRE
PROVISION OF A1 RETAIL FLOORSPACE (Totals)
square metres net[1]

Total floorspace	**ALL**	Trading	Vacant	Construction
January 2007:	**230,940**	**215,890**	**11,503**	**3,547**
July 2006:	**231,116**	**208,222**	**19,309**	**3,585**
July 2001[2]	**202,214**	**171,814**	**11,138**	**19,262**
Total shop units				
January 2007:	**1095**	**985**	**97**	**13**
July 2006:	**1084**	**973**	**104**	**7**
July 2001[1]	**1025**	**916**	**99**	**10**

Overall shop vacancy rate	Proportion of all floorspace	Proportion of available floorspace[3]	Proportion of shop units
January 2007:	**5.0%**	**5.1%**	**8.9%**
July 2006:	**8.4%**	**8.5%**	**9.6%**
July 2001[2]:	**5.5%**	**6.1%**	**9.7%**

Overall retail floorspace change	
Since July 2006:	**DECREASED BY 0.1%**
Since 2001:	**INCREASED BY 14.2%**

(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.
(2) City Centre data for 2001 has been adjusted to the boundaries of the centre as defined the Adopted Local Plan and is not directly comparable with previous monitoring reports compiled on different boundaries.
(3) Not counting space which is under construction or refurbishment

Definition of shopping zones in the City centre

15 The City Council's adopted planning policy for shopping (as set out in the Replacement Local Plan) defines shopping areas within the City centre according to their character and function. These areas are assessed separately in this report and illustrated on the maps in Appendix 2.

- The **Primary Shopping Area** is the zone of shopping streets running north to south between St Stephens Street and the Gentleman's Walk/Market Place area and extending east to cover part of London Street and the 'Norwich Lanes'. It also takes in the more recent shopping developments of Castle Mall and Chapelfield as well as the detached shopping areas of Riverside and Brazen Gate (Sainsburys). This is the core shopping area where most of the 'high-street' multiple retailers and national chains are currently located. City Council policy for this area is to maintain a high proportion of shop uses and to encourage new developments and environmental improvements which will protect, promote and enhance the City's regional shopping role.

- The **Secondary Shopping Areas** are groups of streets with a distinctive historic character and a strong emphasis on local independent and speciality retailing, together with a variety of other uses such as tourist attractions, arts and cultural venues, specialist markets, restaurants/cafés and housing. Included is much of the western half of the 'Norwich Lanes' area (St Benedict's Street, Pottergate/Lower Goat Lane and Upper St Giles), as well as Elm Hill/Wensum Street and the

eastern end of London Street. City Council policy is to protect these areas for specialist shopping and encourage a broad diversity of supporting uses and activities with a programme of environmental improvements to enhance their vitality, local distinctiveness and appeal for shoppers and visitors. It is very important to appreciate that although the Primary/Secondary distinction is a standard one in the retail industry, “secondary” in the Norwich context does not mean “marginal”. The secondary shopping areas are regarded as complementary to, rather than subordinate to, the Primary area and the Council is committed to maintaining that role.

- The area of Magdalen Street, Anglia Square and St Augustines Street is defined as a **Large District Centre** in the Replacement Local Plan. It serves the northern half of the City centre as well as a large part of north Norwich, combining specialist and local independent shopping with shopping facilities at Anglia Square, which serve both the immediate neighbourhood and wider catchment area of north Norwich. City Council policy for this area is to support and maintain its shopping function and to promote major community-led regeneration and renewal. This will be achieved through the emerging *Northern City Centre Area Action Plan* for the wider area (eventually replacing adopted Local Plan policy but still consistent with the adopted Local Plan strategy) and will involve new retail, commercial and residential development, restoration of the historic environment and a major programme of environmental and transportation improvements. Through our New Growth Points status we are expecting significant government funding for a range of essential infrastructure to help prepare the Norwich sub-region for significant levels of housing and jobs growth.

16 The definition of these areas for planning purposes has been established in the adopted Local Plan and may only be reviewed as part of the emerging Norwich Local Development Framework. However, one of the purposes of this monitoring report is to assess any emerging changes in the character and function of different areas of the centre, which will inform any future review of planning policy and any future changes in the designation and extent of these areas.

Primary Shopping Area

TABLE 2
PRIMARY SHOPPING AREA (includes Riverside)
A1 RETAIL FLOORSPACE
square metres net

Total floorspace	ALL	Trading	Vacant	Construction
January 2007:	**176,192**	**169,181**	**3,999**	**3,012**
July 2006:	**173,746**	**160,546**	**12,719**	**481**
July 2001:	**143,375**	**123,379**	**2,398**	**17,598**
Total shop units				
January 2007:	**591**	**548**	**40**	**3**
July 2006:	**586**	**535**	**48**	**3**
July 2001:	**513**	**478**	**25**	**10**
Overall shop vacancy rate		Proportion of all floorspace	Proportion of available floorspace[1]	Proportion of shop units
January 2007:		**2.3%**	**2.3%**	**6.8%**
July 2006:		**7.3%**	**7.3%**	**8.2%**
July 2001:		**1.7%**	**1.9%**	**4.9%**

[1] Not counting space which is under construction or refurbishment

Level and Distribution of Vacancy

17 The primary shopping area has been going through a period of readjustment following the completion and opening of Chapelfield in September 2005. Initially shop vacancies overall rose from 1.3% to 7.9% between January 2005 and January 2006 but by July 2006 it had fallen to 7.3%. This shopping floorspace monitor reports a significant fall in vacancies by January 2007 to **2.3%**. The vacancy figures report in the January 2006 and July 2006 surveys were inflated by the additional 5,574 sq. m of unlet floorspace within the Woolworth's unit at Riverside, which has

now since been occupied. Discounting that space, the vacancy rate in the primary shopping area was 3.7%, still above the January 2007 level of **2.3%**. This is much better than the vacancy level considered acceptable for a shopping area of the size and diversity of Norwich. (The national average vacancy rate for the UK shopping centres defined by Experian is currently in the region of 8%). For Norwich, floorspace vacancy rates in the primary area have rarely exceeded 4% in the past fifteen years and in recent years have been running at between 1% and 2%. It should be noted that such extremely low vacancy rates can show that a shopping area is actually “overheating”: in other words that there is insufficient spare space available in the existing stock to provide for expansion and natural turnover of retailers necessary to sustain a diverse and vibrant centre. Such overcrowding restricts opportunities for new retail investment and can be a distinct disadvantage. A healthy shopping centre should normally have some vacant shop units: a vacancy rate of around 5% is considered by the retail sector to be within “normal” limits for town centres.

18 The primary shopping area of Norwich has demonstrated the ability to absorb the effect of a new centre of the scale of Chapelfield, and is testament to the overall health and vitality of the primary shopping area in the face of changing trading conditions.

19 Castle Mall has responded strongly to the introduction of Chapelfield with the vacancy rate falling from **8.4%** in July to **3.9%** as report on page 4 of this report. Vacancy rates in Castle Mall are now approaching the 2001 level of **2.8%**. The total number of vacant A1 retail units in Castle Mall has fallen from twelve to ten in the previous six months while the total number of shops and stalls has risen from 83 to 86.

20 In Chapelfield the vacancy level had fallen sharply since January 2006 from 7.3% to 3.5% by July 2006 as new units continued to be taken up. The vacancy level has since fallen further to **1.9%**. Within the main part of the scheme falling within the primary shopping area[3], four units remain to be let, down from six in July 2006. Three of these account for the majority of the vacant floorspace and are on the lower (St. Stephens Street) level.

Rest of Primary Area

21 Aside from vacancies recorded within the two main covered shopping centres and at Riverside, there were 26 vacant shop units in streets elsewhere in the primary area, (up from 22 in July 2006), distributed as follows:

- London Street area – 7 units
- Gentlemans Walk/Market area – 3 units
- Back of the Inns area – 9 units
- Timberhill/Westlegate area – 4 units
- Other fringe streets – 3 units

The five market stall pitches awaiting reoccupation following refurbishment of the Provision Market, mentioned in the previous survey, have now been occupied. The largest of the vacant shops is the former **Pilch** store at 1 Brigg Street (280 sq. m), following Pilch's move to 15 London Street after being acquired by Jarrolds. However this is to be occupied by the **Carphone Warehouse** later this year.

[3] Chapelfield Plain (the outdoor portion of the scheme on the north side of Chantry Road between St. Stephens Churchyard and the main Chapelfield mall building) accommodates seven retail units (one of them vacant) and three restaurants. Since this part of Chapelfield was originally intended to be a focus for catering outlets, it was not included within the expanded primary shopping area defined in the Local Plan.

22 The survey recorded nine vacant units in the primary area (totalling 1,535 sq. m) previously occupied either as food and drink outlets (Use Classes A3, A4 and A5) or for financial and professional services (Use Class A2). These comprise four former catering outlets in Castle Mall, the former **McDonalds** at 14-18 Westlegate, the former **Alley Katz** café bar at 18 Bedford Street and the **Travel Information Centre** in Castle Meadow. These units are not regarded as shops for planning purposes but could be reoccupied as such without requiring planning permission and are listed separately in the schedule attached to this report. It is expected that the McDonalds premises would be included in any future redevelopment scheme for Westlegate House (the redundant office building and its car park are allocated as a mixed-use development site including 1,500 sq. m of retail under the adopted Replacement Local Plan policy SHO6).

New Developments and Refurbishment

23 At the time of the January 2007 survey, the only significant development underway was the remodelling of the former **Boots** store at 14-16 St Stephens Street (787 sq.m), which will be incorporated in an expanded retail unit providing 2,210 sq.m of additional retail space in rear extensions to be occupied by **New Look** and by conversion of first floor office space to retail, which will be occupied by **Slaters** clothing store.

Non-Retail Uses - Issues

24 Policy SHO10 of the adopted City of Norwich Replacement Local Plan aims to support the shopping function of the primary shopping area and to protect its retail vitality and viability, by setting thresholds on the proportion of non-retail frontage that will permitted by the City Council. For the purposes of Policy SHO10, the primary shopping area is subdivided into smaller groups of streets – the retail frontage zones – within which limits are applied on the proportion of A1 retail uses at ground floor level (calculated by measured frontage length). Changes of use are not normally permitted which would have a harmful effect on vitality and viability and which would result in the proportion of non-retail uses falling below 85%. Within Castle Mall and Chapelfield, these controls are exercised through a condition on the original planning permission, requiring consent to be obtained for any changes of use which would result in retail representation falling below a minimum threshold in the main retail levels of each centre.

25 Policy SHO10 seeks to strike an appropriate balance between protecting the core retail function of the City centre and encouraging a diversity of uses where this is seen to be beneficial and would enhance the area's vitality and viability. The policy allows exceptions in the case of A3 uses[4], where it can be shown that changes of use breaching the 85% threshold would deliver particular benefits or otherwise enhance the character of the street or area) which could not be achieved by retaining a retail use.

[4] The policy refers to Use Class A3 (food and drink) as defined under the 1987 Use Classes Order. Amendments to the Order in 2005 created three new use classes from the old Class A3: these being cafés and restaurants (A3), bars and restaurants (A4) and hot food takeaways (A5).

TABLE 3

PRIMARY AREA RETAIL FRONTAGE ZONES

showing incidence of non-retail uses (at January 2007)

Frontage Zone (see Appendix 2 for definitions and plan)	**Total measured ground floor frontage (m)**	**Total non-retail frontage (m)**	**Percentage A1 retail / Non-A1 retail split**	**SHO10 Exceede (min 85%**
PR01 London Street West	955.6	161.9	83.1% / 16.9%	Yes
PR02 Gentleman's Walk/Market	937.8	142.6	84.8% / 15.2%	Yes
PR03 Back of the Inns	743.3	86.3	88.4% / 11.6%	No
PR04 Castle Mall	929.1	43.2	95.4% / 4.6%	No
PR05 Timberhill/Westlegate	548.7	97.3	82.3% / 17.7%	Yes
PR06 St Stephens Street	609.5	98.0	83.9% / 16.1%	Yes
PR07 Chapelfield	701.5	8.5	98.8% / 1.2%	No

26 Norwich has a wide variety of eating and drinking places distributed throughout the primary area, offering a good range of choice for shoppers. These include sandwich takeaways (which in planning terms are A1 retail use) and cafés, restaurants, bars and hot food takeaways (which are not – although many national coffee shop chains operating under A1 retail permissions occupy a legally problematic 'grey area' between A1 and A3/A5). In contrast, Class A2 uses (banks, building societies and other financial/professional services) have tended to cluster in areas of the City centre just outside the core, most notably Red Lion Street, Surrey Street and the east end of London Street. These service uses make an important contribution to the 'high street', but it is important to ensure that they do not become over-dominant. This is to preserve the character and vitality of

shopping areas; to ensure the coherence of retail frontages is not broken up; and to maintain the commercial viability of prime shopping areas.

27 When present Local Plan policy SHO10 was first introduced in 2001, there was scope in many parts of the primary area for additional non-retail services to be introduced within the terms of the policy. The period since 2001 has seen a growing number of non-retail uses permitted, resulting in three out of seven frontage zones in the core either reaching or falling below the applicable policy threshold of 85% retail (see Table 3 on the page 21).

Secondary Shopping Areas

TABLE 4
SECONDARY SHOPPING AREAS
A1 RETAIL FLOORSPACE
square metres net

Total floorspace	ALL	Trading	Vacant	Construction
January 2007:	**18,005**	**16,916**	**761**	**328**
July 2006	**18,089**	**17,391**	**591**	**107**
July 2001	**19,352**	**17,353**	**1,964**	**35**
Total shop units				
January 2007:	**193**	**174**	**13**	**6**
July 2006	**192**	**178**	**12**	**2**
July 2001	**208**	**187**	**20**	**1**

Overall shop vacancy rate	Proportion of all floorspace	Proportion of available floorspace[1]	Proportion of shop units
January 2007:	**4.2%**	**4.3%**	**6.7%**
July 2006:	**3.3%**	**3.4%**	**6.3%**
July 2001:	**10.1%**	**10.2%**	**9.6%**

[1] Not counting space which is under construction or refurbishment

28 The latest survey records **18,005 sq. m** (193,734 sq. ft) of shopping floorspace in the secondary shopping areas: this accounts for just under 8% of the space in the City centre as a whole. Since 2001 the secondary areas have lost around 7% of their shopping floorspace, principally through change of use of shops to non-retail (including a number of premises which have been converted to housing).

Level and Distribution of Vacancy

29 Previously the secondary shopping streets had a particularly low level of vacancy in contrast with the primary area. The January 2007 survey shows a significant change with the primary area having a lower vacancy rate than the secondary area. In terms of floorspace, retail vacancy rates in January 2007 have increased slightly from July 2006 but are still significantly less than they were in July 2001.

30 A total of 13 shop vacancies were recorded in the secondary areas in July, totalling 761 sq. m (plus four additional vacant office units and one vacant restaurant unit). The A1 retail vacancies are distributed as follows:

- St. Benedicts area – 2 units
- Upper St. Giles Street – 4 units
- Pottergate/Lower Goat Lane area – 3 units
- Elm Hill/Wensum Street area – 3 units (one in Elm Hill, 2 in Wensum Street)
- St. John Maddermarket – 1 unit

31 There has been a slight increase in shop vacancy levels in the defined secondary shopping area (with a total of 13 units recorded as vacant as against 12 six months ago). Only Wensum Street has experienced some improvement in vacancy since July. A number of properties in Wensum Street are currently undergoing or subject to approved refurbishment/renovation schemes (see paragraph 34) and this area is expected to benefit from the major regeneration initiatives in progress at Quayside and Fishergate. The “Norwich Lanes” initiative is also helping to raise public awareness of the area north of the Market Place (Lower Goat Lane/Pottergate) and to raise its trading profile.

32 The Norwich Lanes area includes portions of both the Primary and Secondary shopping areas defined in the Replacement Local Plan (as well as parts falling within neither area). The Lanes does not at present have any formal planning status: consequently it has not been practicable for technical reasons to carry out a detailed analysis of vacancy levels for the Lanes as a whole.

New Developments and Refurbishment

33 Work is currently underway on the redevelopment of the former **Indoor Market** site at 21-23 St. Benedicts Street, providing two shops and seven flats. The conversion of **23** and **25 Wensum Street** to provide a shop and a house at each address is also currently under construction and is due to be finished by the summer. The upper floors of **18 Wensum Street** are currently undergoing renovation for Wright's Second Hand Furniture and this has led to their occupation of the premises opposite (**17 Wensum Street)**.

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 2007:	**18,290**	**14,723**	**3,525**	**42**
July 2006:	**18,171**	**15,057**	**3,114**	**Nil**
July 2001:	**18,346**	**16,480**	**1,866**	**Nil**
Total shop units				
January 2007:	**137**	**111**	**24**	**2**
July 2006:	**134**	**110**	**24**	**Nil**
July 2001:	**148**	**118**	**30**	**Nil**
Overall shop vacancy rate		Proportion of all floorspace	Proportion of available floorspace[1]	Proportion of shop units
January 2007:		**19.3%**	**19.3%**	**17.5%**
July 2006:		**17.1%**	**17.1%**	**17.9%**
July 2001:		**10.2%**	**10.2%**	**20.3%**

. [1] Not counting space which is under construction or refurbishment.

34 The January survey recorded a total of **18,290 sq. m** (196,800 sq. ft) of retail floorspace in the area, a figure which has remained relatively constant since 2001.

Level and Distribution of Vacancy

35 Since July 2006 the number of vacant units in the Magdalen Street/St Augustines Street/Anglia Square area has remained

stable at 24 (down from 30 in 2001). In terms of floorspace the vacancy rate has increased, now standing at 3,525 sq. m (33,506 sq. ft) which means that 19.3% of the total shopping floorspace available in the area is now vacant, up from 17.1% in July 2006. Anglia Square's anchor foodstore (Budgens), which closed in 2005, remains vacant accounting for 1,003 sq.m (10,800 sq.ft) of floorspace. The closure of Looses Catering Equipment (23-25 Magdalen Street) has been a key factor behind the increase in vacant floorspace this time. A further five units recorded as vacant were previously occupied by financial services and restaurant uses.

36 The A1 retail vacancies in the area are distributed as follows:

- Anglia Square shopping centre – 6 units
- Magdalen Street – 10 units
- St Augustine's area – 8 units

New Development and Refurbishment

37 Several small-scale redevelopment and refurbishment schemes have been undertaken in the Magdalen Street area since 2001. Many of these involve historic buildings and have harnessed funding from the Heritage Economic Regeneration Scheme (HERS), a joint initiative between Norwich City Council and English Heritage. Work is currently underway on the conversion and refurbishment of a derelict property at **111 Magdalen Street**, to provide one shop and two residential units. There are also two other schemes in the area with planning permission involving shopping development, and which affect historic buildings. These are the restoration of **67 St Augustines Street** for residential and retail purposes, and conversion of the ground floor of **3 St Augustines Street** from residential back to shop use. There have been no further applications for new shopping development since the last report in July 2006.

38 However, there remain problems in the area resulting from its gradual decline over many years: in particular a dated and poorly-designed shopping centre, the loss of office employment and other social and environmental issues.

39 To identify and address many of these issues the City Council is involving the local community and stakeholders, including the County Council, landowners and developers, in preparing a **Northern City Centre Area Action Plan,** which will cover the whole of the centre between the River Wensum and the line of the City Wall between Oak Street and Barrack Street. This initiative forms a key part of the Council's emerging Local Development Framework for Norwich and it will entail preparing a statutory development plan and programme of action, which will include extensive improvements to parts of the Large District Centre through redevelopment and refurbishment. Over the summer of 2006, the Council undertook consultation on issues and options for the area with local stakeholders, community groups and the general public. Consultation on the preferred option is planned for the autumn of 2007.

Rest of the Centre

TABLE 6 REST OF CITY CENTRE A1 RETAIL FLOORSPACE square metres net				
Total floorspace	ALL	Trading	Vacant	Construction
January 2007:	**18,086**	**14,528**	**3,218**	**340**
July 2006	**18,901**	**15,229**	**3,672**	**Nil**
July 2001	**21,141**	**14,602**	**4,910**	**1,629**
Total shop units				
January 2007:	**174**	**152**	**20**	**2**
July 2006	**171**	**151**	**20**	**Nil**
July 2001	**156**	**127**	**24**	**5**
Overall shop vacancy rate		Proportion of all floorspace	Proportion of available floorspace(1)	Proportion of shop units
January 2007:		**17.8%**	**18.1%**	**11.5%**
July 2006:		**19.4%**	**24.1%**	**11.7%**
July 2001:		**23.2%**	**25.1%**	**15.4%**

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

Definition

40 The above table refers to all streets in the City centre which are located outside the defined retail areas.

41 Total floorspace recorded in the remainder of the centre in July 2006 was **18,086 sq. m** (194,605 sq. ft); down 4.3% from July 2006. The decrease in the past six months can be attributed to the removal of additional shopping floorspace not previously recorded at Barrack Street (the former Jarrolds site) where redundant warehousing was in temporary use as a shoe factory

outlet shop and an ‘end of range’ clearance shop for Jarrolds’ city centre department store.

Level and Distribution of Vacancy

42 The January 2007 survey recorded 20 vacant shop units, comprising 3,218 sq. m (34,626 sq. ft) of floorspace – 17.8% of the total. This is a decrease on the comparable rate for July 2006 (19.4%) and is lower than the situation in 2001 (23.2%). The number of vacant units has remained stable over the past six months, although a high proportion of the vacant shops recorded in the current survey are large units. They include the former Multiyork furniture store and “Bed World” on Prince of Wales Road (following their relocation to St. Stephens Road), and the former Bennetts Electrical premises at 125-129 King Street. The former “Richer Sounds” at 113 Ber Street has now been occupied by an Islamic information centre and bookshop.

43 The survey also recorded 16 additional vacant office and catering premises (use classes A2, A3, A4 and A5) in various parts of the centre (totalling 1,236 sq. m), which could be reoccupied as shops, although this is unlikely given their peripheral locations.

New Development and Shop Refurbishment

44 Since the July survey, **16-20 Ber Street** has been refurbished and is now occupied by **Gerald Giles Electrical**.

45 The most significant new development schemes involving shopping development are at **St. Anne’s Wharf, King Street** and at the former **Jarrold Printer’s site, Barrack Street**. The approved major redevelopment proposals for **St. Anne's Wharf, King Street** include 437 residential apartments and 2,128 sq.m of commercial floorspace in use classes A1, A2, A3 and D2, of which a maximum of 2,000 sq. m would be retail. This major site

is key to completing the regeneration of King Street and the bridge to be provided from the site will provide the final link in the proposed pedestrian and cycle route connecting Riverside and the railway station to the City centre. The proposals for the former **Jarrold Printer’s site, Barrack Street** include 200 residential units, a 60 bed hotel and 20,500 sq. m of commercial floorspace in use classes A1, A3 and B1, of which a maximum of 999 sq. m would be retail.

46 A mixed-use redevelopment including sheltered housing for the elderly and an additional retail unit at **91-101 Ber Street** (ex Clarks Motorcycles site) is currently under construction. Further schemes are approved at **26-36 Rose Lane** (former Gerald Giles Electrical) and **148-162 King Street**, both of these combining retail or mixed retail/commercial units with housing.

There have been no further retail developments approved within the period since the last survey.

Conclusions

47 Shop vacancy rates in Norwich City centre have decreased significantly since July 2006, (down from 8.4% to 5% of all floorspace). In the primary shopping area, vacancy rates have fallen from 7.3% to 2.3%. This is significantly less than the average vacancy rate for UK shopping centres.

48 Chapelfield celebrated its first anniversary in September 2006. Since the July report the scheme has continued to attract new retailers and the overall vacancy rate in the development has fallen from 3.5% to 1.9% over the past six months. One unit remains unlet following the closure of a shop as a result of national trading difficulties (rather than local circumstances).

49 In both the January and July 2006 reports it was noted the vacant space at Woolworths (Riverside) was inflating the vacancy figures. This unit has now been reoccupied by both Currys and Outfit and as a result vacancy rates in the primary area have fallen significantly.

50 Since July 2006, Castle Mall has shown further improvement with vacancy rates falling from 8.4% to 3.9%, and now approaching the 2001 level of 2.8%. Changes in shopping patterns in the City centre occurred followed the opening of Chapelfield. As the market responds to this, some parts of the Primary shopping area and Secondary shopping areas nearby, are still adjusting and there are pockets of higher vacancy rates in the City centre. The situation will continue to be closely monitored through these survey reports. Since the opening of Chapelfield, the City Council has been mindful of the need to maintain the retail vitality, viability and diversity of the City centre, and will continue to

exercise its planning powers to achieve this in the most appropriate way.

51 The Norwich Area shopping study (commissioned in December 2006) will be essential evidence to inform the Council's joint core strategy and planning strategy for the City centre. The LDF's policies will ensure that shopping development in the retail core both effectively promotes the role of Norwich as the pre-eminent regional shopping centre in the East of England and supports and enhances secondary shopping areas and local centres. Through our New Growth Points status we are expecting significant government funding for a range of essential infrastructure to help prepare the Norwich sub-region for significant levels of housing and jobs growth.

52 The secondary shopping areas have an important role to play in complementing the major attraction of the core. Although the January survey showed that vacancy rates in the secondary areas had risen from 3.3% to 4.2%, this is still considerably less than the 2001 level of 10.1%. The ongoing initiatives being promoted for the Norwich Lanes are helping to ensure that shoppers and visitors become more aware of, and can fully appreciate, the varied attractions of these historic independent shopping streets with their own distinctive identity.

53 The Magdalen Street/St Augustine's Street/Anglia Square area will become a focus for major investment and regeneration in the context of the Northern City Centre Area Action Plan. The survey shows that vacancy rates in the area have risen from 17.1% to 19.3% over the past six months, although the closure of a major retailer for the area was a key factor. Consultation on issues and options for the Northern City Centre Area Action Plan during 2006 confirmed a number of important issues for stakeholders including the need to promote further shopping development and

improve the quality and retail focus of Anglia Square and its immediate environs. Consultation on the preferred option for the area is planned for the autumn.

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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Appendix 1

Technical Appendix – Street By Street Vacancies Listing

NORWICH CENTRAL AREA SHOPPING FLOORSPACE MONITOR, JANUARY 2007
SUMMARY TABLE

	A1 Retail				Jan 07	Jul 06	Jul 01
	Vacant Floorspace		All f'space	Units	Vacancy	Vacancy	Vacancy
PRIMARY SHOPPING AREA	**Sq. M**	**Sq. Ft**	**Sq.M**		**as % total**	**as % total**	**as % total**
A1 Retail Floorspace in:							
Castle Mall	932	10,030	24,181	10	3.9%	8.4%	2.8%
Chapelfield	564	6,070	29,114	4	1.9%	3.5%	n/a
Riverside	Nil	Nil	17,693	Nil	0.0%	31.5%	n/a
Rest of Primary Area	2,503	26,940	102,185	26	2.4%	4.0%	1.5%
Total Primary Area	**3,999**	**43,050**	**173,967**	**40**	**2.3%**	**7.3%**	**1.7%**
Additional A1 f'space under development	3,012	32,420		3			
Additional A1 f'space with planning permission	286	3,080		2			
Sub Total	**7,297**	**78,550**	**173,967**	**45**			

	A1 Retail				Jan 07	Jul 06	Jul 01
	Vacant Floorspace		All f'space	Vacant	Vacancy	Vacancy	Vacancy
SECONDARY SHOPPING AREAS	**Sq. M**	**Sq. Ft**	**Sq.M**	**Units**	**as % total**	**as % total**	**as % total**
A1 Retail Floorspace in:							
St Benedicts	141	1,520	8,975	2	1.6%	1.0%	10.4%
Upper St Giles	145	1,560	664	4	21.8%	17.8%	8.6%
Pottergate/Lower Goat Lane	205	2,210	4,305	3	4.8%	1.4%	3.7%
London Street (East)	Nil	Nil	1,026	Nil	0.0%	0.0%	0.0%
Elm Hill/Wensum Street	237	2,550	1,552	3	15.3%	20.7%	29.1%
St. John Maddermarket	33	360	1,483	1	2.2%	0.0%	9.1%
Total Secondary Areas	**761**	**8,190**	**18,005**	**13**	**4.2%**	**3.3%**	**10.1%**
Additional A1 f'space under development	328	3,530		6			
Additional A1 f'space with planning permission	Nil	Nil		Nil			
Sub Total	**1,089**	**11,720**	**18,005**	**19**			

	A1 Retail				Jan 07	Jul 06	Jul 01
	Vacant Floorspace		All f'space	Vacant	Vacancy	Vacancy	Vacancy
MAGDALEN STREET/ANGLIA SQUARE (Large District Centre)	**Sq. M**	**Sq. Ft**	**Sq.M**	**Units**	**as % total**	**as % total**	**as % total**
A1 Retail Floorspace in:	3,525	37,940	18,290	24	**19.3%**	**17.1%**	**10.2%**
Additional A1 f'space under development	42	450		2			
Additional A1 f'space with planning permission	15	160		1			
Sub Total	**3,582**	**38,550**	**18,290**	**27**			

	A1 Retail				Jan 07	Jul 06	Jul 01
	Vacant Floorspace		All f'space	Vacant	Vacancy	Vacancy	Vacancy
OTHER STREETS IN THE CITY CENTRE	**Sq. M**	**Sq. Ft**	**Sq.M**	**Units**	**as % total**	**as % total**	**as % total**
A1 Retail Floorspace	3,218	34,640	18,086	20	**17.8%**	**19.4%**	**23.2%**
Additional A1 f'space under development	340	3,660		2			
Additional A1 f'space with planning permission	2,135	22,980		3			
Sub Total	**5,693**	**61,280**	**18,086**	**25**			

	A1 Retail				Jan 07	Jul 06	Jul 01
	Vacant Floorspace		All f'space	Vacant	Vacancy	Vacancy	Vacancy
CITY CENTRE TOTALS	**Sq. M**	**Sq. Ft**	**Sq.M**	**Units**	**as % total**	**as % total**	**as % total**
Vacant Retail Floorspace	11,503	123,820	228,348	97	**5.0%**	**8.8%**	**5.5%**
Additional A1 f'space under development	3,722	30,600		13			
Additional A1 f'space with planning permission	2,436	26,220		6			
TOTAL	**17,661**	**180,640**		**116**			

NORWICH CENTRAL AREA, JANUARY 2007
VACANT AND POTENTIAL SHOPPING ACCOMMODATION

The estimates of net retail space used in this report reflect a re-survey of the central shopping area undertaken in May/June 1993 in conjunction with Norfolk County Council and updated from planning application records and other sources thereafter.

		Net Retail Space		
A.	**PRIMARY SHOPPING AREA**			
1.	**Vacant Shop Units**	**Sq. M**	**Sq. Ft**	**Previous Use**
	11 Back-of-the-Inns	86	930	Confectioner
	19-19a Bedford Street	115	1,240	Snack Bar (A1)
	10-12 Bridewell Alley	78	840	Charity Shop
	16 Bridewell Alley	36	390	Cards and Stationery
	18-18a Bridewell Alley	30	320	Records, Tapes and Compact Discs
	1 Brigg Street	280	3,010	Sports Goods
	Castle Mall			
	Unit 9-10 (LU36/37) White Lion Walk	246	2,650	Clothes
	Unit 44 (LU10) White Lion Walk	174	1,870	Sports Goods
	Stall, White Lion Walk	8	90	Cosmetics
	Stall, White Lion Walk	8	90	-
	Unit 75 (UU20) Castle Meadow Walk	83	890	Clothes
	Unit 76 (UU19) Castle Meadow Walk	83	890	Clothes
	Unit 96-97 (UU02/03) Castle Meadow Walk	167	1,800	Furniture and Furnishings
	Unit 101-102 (K1) St. John's Gallery	37	400	Sandwich Bar
	Unit 104 St. John's Gallery	24	260	Hobby Shop
	Unit 112-113 (TU12/Unit 6) St. John's Row	102	1,100	Snack Bar (A1)
	7 Castle Meadow (SU5 Castle House)	490	5,270	Unlet
	16a Castle Meadow	24	260	Hairdresser
	5 Castle Street	80	860	Travel Agent
	Chapelfield			
	Unit 40 (MSU2) Lower Merchants Hall	239	2,570	Video Tape Shop
	Unit 44 (LG20) Lower Merchants Hall	175	1,880	Unlet
	Unit 45 (LG19) Lower Merchants Hall	142	1,530	Unlet
	Unit 146 (UG11) Upper Merchants Hall	8	90	Cosmetics
	10 Davey Place	55	590	Shoe Repair
	6 Exchange Street	64	690	Travel Agent
	8 Exchange Street	18	190	Computers
	39 Gentlemans Walk	33	360	Cycles
	39a Gentlemans Walk	89	960	Clothes
	33 London Street	113	1,220	Travel Agent
	8 Orford Hill	15	160	Sports Goods
	Provision Market			
	Fully occupied			
	2 Queens Road	306	3,290	Computers
	Riverside			
	Fully occupied			
	3 Royal Arcade	47	510	Clothes
	5 Royal Arcade	50	540	Watches
	10 Timberhill	27	290	Photographer
	3 Westlegate	63	680	Clothes
	15 Westlegate	56	600	Computers
	1 White Lion Street	153	1,650	Optician
	3 White Lion Street	56	600	Jeweller
	12 White Lion Street	76	820	Dry Cleaners
	24 White Lion Street	63	680	Clothes
	Total vacant shopping floorspace (A1)	**3,999**	**43,050**	**40 units**

A.	PRIMARY SHOPPING AREA continued …			
2.	**Vacant Class A non-retail space (potentially occupiable as A1 retail)**	**Net Floorspace**		**Previous Use**
	18 Bedford Street	178	1,920	Café Bar (A4)
	<u>Castle Mall</u>			
	Unit U1 (Food Court)	126	1,360	Takeaway (A5)
	Unit U5 (Food Court)	70	750	Restaurant and Takeaway (A3)
	Unit 57 (UU33) Castle Meadow Walk	224	2,410	Snack Bar (A3)
	Unit 110-111 St. John's Row	139	1,500	Restaurant and Takeaway (A3)
	17-19 Castle Meadow	147	1,580	Travel Centre (A2)
	32 St. Stephens Street	260	2,800	Restaurant and Takeaway (A3)
	36-38 St. Stephens Street	56	600	Bank (A2)
	14-18 Westlegate	335	3,610	Restaurant (A3)
	Total	**1,535**	**16,530**	**9 units**

3.	**Floorspace under development (construction/refurbishment/refitting)**	**Net Retail Space**		
		Sq. M	**Sq. Ft**	**Previous Use**
	<u>Chapelfield</u>			
	Lower Merchants Hall (Nikita Hair)	15	160	New
	<u>14-18 St. Stephens Street</u>			
	14-16 St. Stephens Street (existing floorspace to be retained - under refurb)	787	8,470	Chemist
	14-18 St. Stephens Street (Rear extension at first and second floors to provide additional retail space, change of use of (vacant) offices to retail)	2,210	23,790	Office floorspace
	Total	**3,012**	**32,420**	**3 units**

4.	**Floorspace with planning permission affecting retail development**	**Net Retail Space**		
		Sq. M	**Sq. Ft**	**Previous Use**
	<u>Castle Mall</u>			
	Unit 108-109 St. John's Row	210	2,260	Clothes Shop
	12-12A White Lion Street	76	820	Dry Cleaners
	Total	**286**	**3,080**	**2 units**

B.	SECONDARY SHOPPING AREAS			
		Net Retail Space		
1.	Vacant Shop Units	Sq. M	Sq. Ft	Previous Use
	13a Dove Street	139	1,500	Sports Goods
	Church of St Simon and Jude, Elm Hill	186	2,000	Sports Goods
	12a Pottergate	21	230	Clothes
	2 St. Andrews Street	33	360	Newsagent
	30 St. Benedicts Street	92	990	Books
	64 St. Benedicts Street	49	530	Shoes
	15 St. Giles Street	45	480	Antiques
	76 Upper St. Giles Street	34	370	Chemist
	88 Upper St. Giles Street	17	180	Gifts
	90 Upper St. Giles Street	67	720	Clothes
	95a Upper St. Giles Street	27	290	Clothes Care Shop
	20 Wensum Street	17	180	Antiques
	21 Wensum Street	34	370	Furniture
	Total vacant shopping floorspace (A1)	**761**	**8,200**	**13 units**

2.	Vacant Class A non-retail space (potentially occupiable as A1 retail)	Sq. M	Sq. Ft	Previous Use
	22a Wensum Street	17	180	Financial and Professional Services (A2)
	55 St. Benedicts Street	71	760	Property Letting Agency (A2)
	55-57 St. Benedicts Street	104	1,120	Insurance (A2)
	1 Woolgate Court, St. Benedicts Street	201	2,160	Insurance (A2)
	Total	**393**	**4,220**	**4 units**

3.	Floorspace under development	Net Retail Space		
	(construction/refurbishment/refitting)	Sq. M	Sq. Ft	Previous Use
	15 Lower Goat Lane	61	660	Clothes
	21 St. Benedicts Street (Redevelopment to provide two shops and 7 flats)	75	810	Indoor Market (site of)
	23 St. Benedicts Street (Redevelopment as no. 21)	111	1,190	Indoor Market (site of)
	18 Wensum Street	34	370	Furniture
	23 Wensum Street (refurbishment and extension to provide ground floor retail unit and two-storey house	29	310	Clothes
	25 Wensum Street (refurbishment and extension to provide ground floor retail unit and two-storey house house	18	190	Clothes
	Total	**328**	**3,530**	**6 units**

4.	Floorspace with planning permission	Net Retail Space		
	affecting retail development	Sq. M	Sq. Ft	Previous Use
	Total	**Nil**	**Nil**	**Nil**

C.	MAGDALEN STREET/ANGLIA SQUARE LARGE DISTRICT CENTRE			
		Net Retail Space		
1.	Vacant Shop Units	Sq. M	Sq. Ft	Previous Use
	6-6a Anglia Square	151	1,630	Toys
	17-23 Anglia Square	1,003	10,800	Supermarket
	1 Annes Walk	96	1,030	Charity Shop
	16 Botolph Way	240	2,580	Musical Instruments
	17 Botolph Way	120	1,290	Beds
	3 Magdalen Street	65	700	Secondhand
	5 Magdalen Street	390	4,200	Charity Shop
	23-25 Magdalen Street	468	5,040	Kitchenware
	27 Magdalen Street	25	270	Furniture
	52-56 Magdalen Street	314	3,380	Sports Goods
	86 Magdalen Street	21	230	Photographer
	118 Magdalen Street	49	530	Beautician
	124 Magdalen Street	22	240	Musical Instruments
	149 Magdalen Street	35	380	Health Food
	157 Magdalen Street	31	330	Gifts
	10 Sovereign Way	141	1,520	Photographer
	13 St. Augustines Street	56	600	Art
	17 St. Augustines Street	31	330	Longterm Vacant
	19 St. Augustines Street	36	390	Sport and Leisure
	32 St. Augustines Street	30	320	Computer Goods
	33 St. Augustines Street	90	970	Longterm Vacant
	50 St. Augustines Street	28	300	Snack Bar
	59 St. Augustines Street	14	150	Shoes
	67 St. Augustines Street (1)	69	740	Clothes
	Total vacant shopping floorspace (A1)	**3,525**	**37,950**	**24 units**

(1) Scheme approved for refurbishment and part conversion to residential, retaining a single ground floor shop unit of 85 sq.m

2.	Vacant Class A space (potentially occupiable as A1 retail)	Sq. M	Sq. Ft	Previous Use
	48 Magdalen Street	30	320	Office (A2)
	98 Magdalen Street	49	530	Restaurant (A3)
	165 Magdalen Street	21	230	Office (A2)
	29 St. Augustines Street	42	450	Office (A2)
	37 St. Augustines Street	99	1,070	Office (A2)
	Total	**241**	**2,600**	**5 units**

3.	Floorspace under development	Net Retail Space		
	(construction/refurbishment/refitting)	Sq. M	Sq. Ft	Previous use
	111 Magdalen Street (Renovation of existing builiding to provide one shop, one maisonette and one house)	17	180	-
	161 Magdalen Street (refurbishment/refitting)	25	270	-
	Total	**42**	**450**	**2 units**

4.	Floorspace with planning permission	Net Retail Space		
	affecting retail development	Sq. M	Sq. Ft	Previous Use
	3 St Augustines Street (Change of use of ground floor from residential unit to shop)	15	160	Residential (C3)
	Total	**15**	**160**	**1 units**

D.	OTHER STREETS IN THE CITY CENTRE			
		Net Retail Space		
1.	Vacant Shop Units	Sq. M	Sq. Ft	Previous Use
	13-17 Bank Plain	120	1,290	Post Office
	36 Ber Street	46	500	Unlet (New Unit)
	42 Ber Street	51	550	Unlet (New Unit)
	60-70 Ber Street	170	1,830	Tanning Salon
	81 Ber Street	21	230	Furniture
	54 Bethel Street	70	750	Printing
	56 Bethel Street	34	370	Secondhand
	60 Bethel Street	100	1,080	Office Equipment
	Broadland Court, Wherry Road			Unlet (New Unit)
	29 Cattle Market Street	62	670	Unlet (New Unit)
	Chapelfield			
	Unit 125 (MW03 Chapelfield Plain)	160	1,720	Unlet (New Unit)
	21 Charing Cross	11	120	Security Systems
	17 Colegate	50	540	Carpets
	52-54 King Street	114	1,230	Book Shop
	125-129 King Street	1,120	12,060	Electrical
	47-51 Pitt Street	262	2,820	Audio Equipment
	101 Prince of Wales Road	600	6,460	Furniture
	106 Prince of Wales Road	45	480	Computers
	111 Prince of Wales Road	182	1,960	Beds
	13 St. Stephens Road		Nil	Hearing Centre
	Total vacant shopping floorspace (A1)	**3,218**	**34,660**	**20 units**

2.	Vacant Class A space (potentially occupiable as A1 retail)	Sq. M	Sq. Ft	Previous Use
	7 Bank Plain	Nil	Nil	Bank (A2)
	139 Ber Street	42	450	Takeaway (A5)
	2 Cathedral Street	40	430	Restaurant (A3)
	32-33 Cattle Market Street	20	220	Financial and Professional Services (A2)
	4 Eastbourne Place	22	240	Financial and Professional Services (A2)
	191 King Street	143	1,540	Public House (A4)
	73 Oak Street	163	1,750	Public House (A4)
	5 Orford Hill (Bell Hotel 1st Floor)	222	2,390	Financial and Professional Services (A2)
	27(a) Prince of Wales Road	70	750	Financial and Professional Services (A2)
	32-34 Prince of Wales Road	57	610	Financial and Professional Services (A2)
	39-41 Prince of Wales Road	50	540	Financial and Professional Services (A2)
	48 Prince of Wales Road	48	520	Financial and Professional Services (A2)
	54-56 Prince of Wales Road	144	1,550	Financial and Professional Services (A2)
	108 Prince of Wales Road	45	480	Financial and Professional Services (A2)
	9 Rose Lane	60	650	Financial and Professional Services (A2)
	18 St. Georges Street	110	1,180	Public House (A4)
	Total	**1,236**	**13,300**	**16 units**

	OTHER STREETS IN THE CITY CENTRE			
3.	Floorspace under development (construction/refurbishment/refitting)	Net Retail Space Sq. M	Sq. Ft	Previous Use
	16-20 Ber Street	175	1,880	Computer and Telecommunications Equipment
	93-101 Ber Street (Demolition of 93-99 Ber Street and rear extensions to 101 Ber Street, conversion of upper floors of 101 Ber Street to 2 one bedroom flats (retaining retail unit on ground floor) and redevelopment of remainder of site to provide one additional retail unit, 14 one bedroom flats, 2 two bedroom flats (total 18 flats) to be used as social housing for the elderly).	165	1,780	Motorcycle Showroom (site of)
	Total	**340**	**3,660**	**2 units**

4.	Floorspace with planning permission affecting retail development	Net Retail Space Sq. M	Sq. Ft	Previous Use
	26-36 Rose Lane (Demolition and redevelopment to provide 4 retail units and 21 flats)	No net gain		Electrical Goods
	148-162 King Street (Demolition and redevelopment by the erection of two and a half, three and four storey blocks to provide (18 two-bedroom, 3 one-bedroom and 1 three-bedroom) flats with two commercial/workshop/studio (Class A1/B1) units and associated car/cycle parking and amenity areas)	135	1,450	New Scheme
	St Anne's Wharf, King Street (Demolition and redevelopment to provide 437 residential units, 2128 sq m of A1,A2 , A3 and D2 uses (max.2000 sq m A1), provision of 305 car parking spaces, riverside walkway, public open space and hard and soft landscaping	2,000	21,530	New Scheme
	Total	**2,135**	**22,980**	**3 units**

NORWICH CENTRAL AREA SHOPPING FLOORSPACE
SURVEY OF JANUARY 2007

TABLE 1 - VACANT A1 FLOORSPACE TOTALS BY RETAIL AREA
As defined in the City of Norwich Replacement Local Plan (Adopted Version), November 2004

PRIMARY SHOPPING AREA	All Retail Floorspace (Net)			Vacant Retail Floorspace (inc rebuilding and refitting)			Percentage Vacant	
Defined Retail Frontages	**Sq M**	**Sq Ft**	**Units**	**Sq M**	**Sq Ft**	**Units**	**Space**	**Units**
London Street West	20,784	223,720	79	454	4,890	7	2.2%	8.9%
Gentlemans Walk/Market	24,629	265,110	53	402	4,330	3	1.6%	5.7%
Back of the Inns	9,012	97,010	73	666	7,170	9	7.4%	12.3%
Castle Mall - Levels 1 & 2	21,283	229,100	77	769	8,280	7	3.6%	9.1%
Timberhill/Westlegate	14,521	156,310	40	161	1,730	4	1.1%	10.0%
St Stephens Street	27,033	290,990	38	787	8,470	1	2.9%	2.6%
Chapelfield - Levels 1 & 2	28,583	307,670	78	564	6,070	4	2.0%	5.1%
Provision Market	1,368	14,730	101	-	-	-	0.0%	0.0%
Brazen Gate	4,170	44,890	2	-	-	-	0.0%	0.0%
Riverside	17,693	190,450	10	-	-	-	0.0%	0.0%
Frontages for Non Retail Uses*								
Red Lion Street	1,227	13,210	7	-	-	-	-	-
Queens Road	821	8,840	5	306	3,290	1	37.3%	20.0%
Castle Meadow	1,568	16,880	14	514	5,530	2	32.8%	14.3%
Castle Mall - Levels 3 & 4	2,898	31,190	9	163	1,750	3	5.6%	33.3%
Surrey Street	56	600	1	-	-	-	-	-
Chapelfield Dining Terrace	546	5,880	4	-	-	-	0.0%	0.0%
TOTAL PRIMARY AREA	**176,192**	**1,896,580**	**591**	**4,786**	**51,510**	**41**	**2.7%**	**6.9%**

SECONDARY SHOPPING AREAS								
Defined Retail Frontages								
St Benedicts Street	9,161	98,610	61	141	1,520	2	1.5%	3.3%
Upper St Giles Street	664	7,150	15	145	1,560	4	21.8%	26.7%
Pottergate/Lower Goat Lane	4,305	46,340	61	266	2,860	4	6.2%	6.6%
London Street (East)	1,026	11,040	9	-	-	-	0.0%	0.0%
Frontages for Non Retail Uses*								
St John Maddermarket	1,483	15,960	15	33	360	1	2.2%	6.7%
Elm Hill/St. Andrews Street/Wensum Street	1,552	16,710	32	318	3,420	6	20.5%	18.8%
TOTAL SECONDARY AREAS	**18,191**	**195,810**	**193**	**903**	**9,720**	**17**	**5.0%**	**8.8%**

LARGE DISTRICT CENTRE								
Defined Retail Frontage								
Magdalen Street South/Anglia Square	14,562	156,750	83	3,034	32,660	12	20.8%	14.5%
Frontages for Non Retail Uses*								
Magdalen Street North	1,670	17,980	29	179	1,930	6	10.7%	20.7%
St Augustines Street	2,075	22,340	25	354	3,810	8	17.1%	32.0%
TOTAL LARGE DISTRICT CENTRE	**18,307**	**197,070**	**137**	**3,567**	**38,400**	**26**	**19.5%**	**19.0%**

OTHER STREETS IN THE CENTRE								
Other Streets in the Centre	18,251	196,460	174	3,393	36,520	21	18.6%	12.1%
CITY CENTRE TOTAL	**230,941**	**2,485,920**	**1,095**	**12,649**	**136,150**	**105**	**5.5%**	**9.6%**

* The City of Norwich Replacement Local Plan (Second Deposit Version) distinguishes between ***Defined Retail Frontages*** where changes of use are only permitted if the proposal will not result in the proportion of frontage in A1 retail use falling below a certain threshold (proportion varies according to location) and ***Frontages for Non-Retail Uses*** where non-retail uses are generally accepted where compatible with surrounding uses. See Policies SHO10 and SHO11 for details.

NORWICH CENTRAL AREA SHOPPING FLOORSPACE						
SURVEY OF JANUARY 2007						
TABLE 2 - A1 FLOORSPACE TOTALS BY CATEGORY						
					% of existing f'space	
Code		**Sq M Net**	**Sq Ft Net**	**Units**	**Space**	**Units**
01	**DEPARTMENT STORES**	**49,001**	**527,460**	**7**	**21.5%**	**0.6%**
02	**Large Multiple and Variety Stores**	**11,774**	**126,740**	**6**	**5.2%**	**0.6%**
	CONVENIENCE GOODS					
03	Supermarkets, general & specialist grocers	12,851	138,330	37	5.6%	3.4%
	(includes food halls in larger stores)					
04	Butchers	111	1,190	6	0.0%	0.6%
05	Fishmongers	58	620	5	0.0%	0.5%
06	Greengrocers	56	600	6	0.0%	0.6%
07	Bakers	368	3,960	4	0.2%	0.4%
08	Wines and Spirits	464	4,990	3	0.2%	0.3%
09	Confectionery/Tobacco/News	1,084	11,670	26	0.5%	2.4%
	TOTAL CONVENIENCE GOODS	**14,992**	**161,360**	**87**	**6.6%**	**8.0%**
	DURABLE GOODS					
02	General Household Goods	6,438	69,300	14	2.8%	1.3%
	(not classifiable elsewhere - includes catalogue					
	showrooms and general markets)					
10	Shoes	4,787	51,530	39	2.1%	3.6%
11	Clothes	43,935	472,930	180	19.2%	16.5%
13	Fabrics	1,569	16,890	20	0.7%	1.8%
14	Furniture/Carpets	7,490	80,620	36	3.3%	3.3%
15	Antiques Crafts and Gifts	5,829	62,740	57	2.6%	5.2%
16	Art and Graphics	1,547	16,650	31	0.7%	2.8%
17	Home Entertainment(Electrical/Records)	9,693	104,340	42	4.2%	3.9%
18	Office and Computer Goods	2,673	28,770	32	1.2%	2.9%
19	DIY/Household	3,300	35,520	23	1.4%	2.1%
20	Books and Stationery	10,275	110,600	40	4.5%	3.7%
21	Photographic and Optical	1,099	11,830	15	0.5%	1.4%
22	Chemists/Cosmetics	9,001	96,890	32	3.9%	2.9%
23	Cycles and Motor Accessories	230	2,480	5	0.1%	0.5%
24	Jewellery	2,545	27,400	49	1.1%	4.5%
25	Sport and Leisure	8,731	93,980	32	3.8%	2.9%
26	Garden Goods	316	3,400	12	0.1%	1.1%
27	Pets and Pet Care	40	430	3	0.0%	0.3%
28	Toys and Games	4,683	50,410	13	2.1%	1.2%
29	Secondhand/Charity	2,116	22,780	21	0.9%	1.9%
	TOTAL DURABLE GOODS	**126,297**	**1,359,490**	**696**	**55.3%**	**63.9%**
	SERVICE USES*					
30	Personal Care (e.g. Hairdressers)	5,004	53,860	94	2.2%	8.6%
31	Clothes Care (e.g. Shoe repair)	305	3,280	10	0.1%	0.9%
32	Sandwich Bars etc. (Use Class A1)	4,303	46,320	47	1.9%	4.3%
36	Travel Agents etc.	2,292	24,670	16	1.0%	1.5%
38	Post Offices	237	2,550	1	0.1%	0.1%
39	Medical Services	880	9,470	11	0.4%	1.0%
41	Media Services (e.g. Copy bureaux)	630	6,780	9	0.3%	0.8%
42	Funeral Services			1		0.1%
	TOTAL SERVICE USES IN A1	**13,651**	**146,930**	**189**	**6.0%**	**17.3%**
	VACANT PREMISES					
00	Vacant ceased trading/to let/for sale	11,503	123,820	**97**	5.0%	8.9%
	Vacant refitting or rebuilding	1,146	12,340	**8**	0.5%	0.7%
	Subtotal Existing Retail Floorspace	**228,364**	**2,458,170**	**1,090**		
	New A1 Floorspace Under Construction	2,576	27,730	**5**	+1.1%	+0.5%
	TOTAL FLOORSPACE ALL TYPES	**230,940**	**2,485,900**	**1,095**	**100.0%**	**100.0%**

**This listing is confined to businesses which are classified as A1 retail in the Town and Country Planning (Use Classes) Orders. A2 Financial and Professional Services (Banks, Building Societies etc), A3 Food and Drink (pubs, restaurants, hot food takeaways) and other quasi-retail uses such as car sales and amusement centres are excluded. Premises selling cold food to take away are regarded as shops provided that they do not include a significant restaurant area.*

PERMISSIONS GRANTED FOR RETAIL DEVELOPMENT/PROPOSALS AFFECTING RETAIL PREMISES
August 2006-5 January 2007

New Retail or Change of Use to A1

Application No	Location	Approval Date	Proposal	Retail Floorspace Gains Floorspace (sq.m)	Retail Floorspace Gains Floorspace (sq.ft)	Retail Floorspace Losses Floorspace (sq.m)	Retail Floorspace Losses Floorspace (sq.ft)
06/00940/NF3	4B Guildhall Hill	12-Oct-2006	Temporary change of use of ground floor and basement from former advice centre to shop until 1st April 2007	612	6590		
06/00953/CLE	16-20 Ber Street	9-Nov-2006	Application for a Certificate of Lawful Use for existing use as retail (A1).	n/a	n/a	n/a	n/a

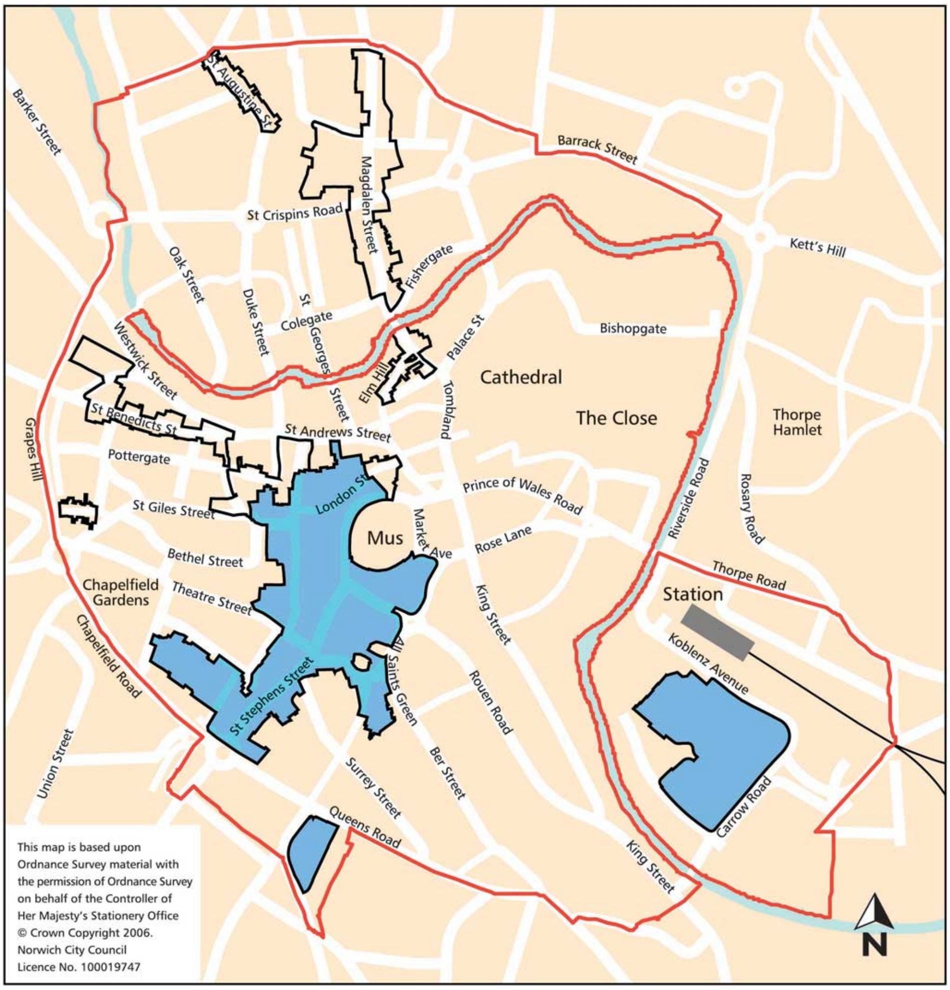
Other Changes affecting A1

Application No	Location	Approval Date	Proposal	Retail Floorspace Gains Floorspace (sq.m)	Retail Floorspace Gains Floorspace (sq.ft)	Retail Floorspace Losses Floorspace (sq.m)	Retail Floorspace Losses Floorspace (sq.ft)
06/00667/F	77 Upper St. Giles Street	21-Sep-2006	Installation of a shop awning	n/a	n/a	n/a	n/a
06/00790/U	Guildhall Chambers, 35 St. Giles Street	12-Oct-2006	Change of use from retail (A1) to chartered surveyors (A2)			97	1040
06/00852/F	22A White Lion Street	17-Oct-2006	Alterations to shopfront.	n/a	n/a	n/a	n/a
06/01024/F	5 Riverside Retail Park, Albion Way	23-Nov-2006	Installation of late night dispensary hatch into existing shop front glazing.	n/a	n/a	n/a	n/a
06/00944/F	12-12A White Lion Street	11-Dec-2006	Conversion from shop (Class A1) to café/restaurant (Class A3) installation of a new shopfront and awning structure on the front elevation.			76	820
06/01229/U	Unit 3 St. Johns Row	5-Jan-2007	Change of use from retail (A1) to recruitment centre (A2).			210	2260

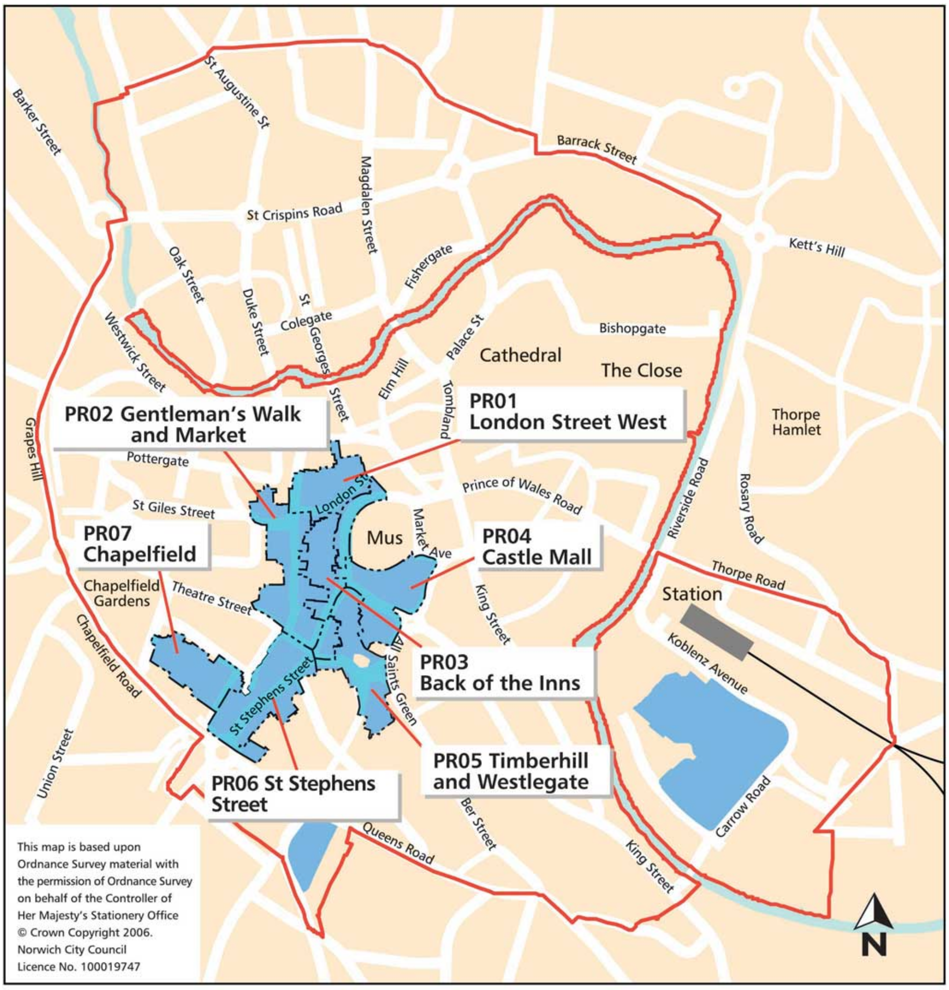
Appendix 2

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)

Appendix 3
Relevant Local Plan Policies for City Centre Shopping

SHO4

Retail development in the King Street area at St Anne's Wharf and adjoining sites (as identified on the Proposals Map) [Site SHO 4.1 – 3.8ha] will be permitted up to a maximum of 2,000 square metres net retail floorspace, together with appropriate tourism facilities and food and drink uses in addition. Development should be primarily in the form of small speciality or local shop units and will be associated with an appropriate mix of uses including housing.

SHO5

Retail development will be accepted as part of a mixed use development on the land adjoining Anglia Square and fronting Pitt Street, Edward Street and Botolph Street (including demolition of the former Broadside Warehouse) [Site SHO5.1 – 1.6ha]. The net additional retail floorspace proposed will not exceed 4,900 square metres and will provide for a retail link between Anglia Square and St Augustine's Street. Proposals should provide for additional employment development and housing within the overall scheme (in accordance with policy CC7).

SHO6

Retail development will be permitted as part of a mixed use development in the area between Westlegate and Timberhill, if redevelopment of the area is proposed [Site SHO6.1 – 0.13ha] provided that the net additional retail floorspace does not exceed 1,500 square metres. The form of development must provide for a pedestrian link between Timberhill (Castle Mall entrance) and Westlegate.

SHO7

Within the City Centre Retail Area defined on the Proposals Map and within the Large District Centre Retail Area of Anglia Square (also defined on the Proposals Map) the expansion or extension of retail units or conversion of other premises to retail use Within the City Centre Retail Area defined on the Proposals Map and within the Large District Centre Retail Area of Anglia Square (also defined on the Proposals Map) the expansion or extension of retail units or conversion of other premises to retail use will be permitted where:

(i) The increase in net retail floorspace does not exceed 500 square metres;

(ii) good, safe pedestrian access between the unit and the main retail part of the centre is available;

(iii) the proposals are in keeping with the appearance and character of the retail frontage and of the sub-area of the City Centre;

This policy will also apply to any site within walking distance of the

defined centre, provided the pedestrian access does not involve crossing a major traffic route or a change in level, which would not be easily accessible by people in wheelchairs.

SHO8

Retail developments of 1,000 square metres net or above in the City Centre will be expected to contribute to the enhancement of the Shopmobility scheme. Sites which provide car parking for short-stay use (over 300 spaces) will also be expected to include provision for the hiring and return of wheelchairs for the scheme.

SHO9

Retail development in the City Centre will only be permitted where it makes provision for;

- the enhancement of public areas outside the development site where such measures are necessary to complete an acceptable overall scheme and this cannot be achieved satisfactorily within the form of the development itself;
- appropriate uses of upper floors, including residential uses where not detrimental to the amenity of occupiers due to late night or noisy uses; and,
- where development is for more that 1,000 square metres net, the provision of off-site public facilities reasonably required in connection with the development.

In particular the Council will permit:

- outdoor sitting areas for cafes, restaurants and bars;
- outdoor play facilities for children
- enhanced pedestrian and cycle circulation within the

Centre (see policy TRA14 and TRA15);

- provision of litter facilities, which utilise appropriate locations without undue prominence, and public toilets;
- street design initiatives, especially within the pedestrian priority areas;
- appropriate signing, including signs for visitors, subject to policy TRA27.

SHO10

Within the Primary Retail Area non-retail uses in classes A2 and A3, will be permitted where they would not have a harmful impact on the vitality and viability of the area and on the individual street and where the proportion of Class A1 retail uses at ground floor level within the measured defined retail frontage would not fall below 85% (taking account of other committed proposals not yet implemented) as a result.

Class A3 uses will be permitted in excess of 15% where they would have a beneficial effect on the vitality, viability and appearance of the area

The beneficial use of upper floors or of premises without frontage onto a defined retail frontage zone, including residential use will be permitted where it is compatible with surrounding uses.

SHO11

Within the Secondary Retail Areas and the Major District Centre of Magdalen Street, Anglia Square and St Augustine’s, uses in classes other than A1 will be permitted where they would not have a harmful impact on the vitality and viability of the area and on the individual

street and where;

- In Upper St Giles, Pottergate/St John Maddermarket, London Street (east), the proportion of Class A1 retail uses at ground floor level within the defined retail frontage zone would not fall below 70% (taking account of other committed proposals not yet implemented) as a result.
- In St Benedicts Street, the proportion of Class A1 retail uses at ground floor level within the defined retail frontage zone would not fall below 40% (taking account of other committed proposals not yet implemented) as a result.
- In Magdalen Street, Anglia Square and St Augustine’s, the proportion of Class A1 retail uses at ground floor level within the defined retail frontage zone would not fall below 70% (taking account of other committed proposals not yet implemented) as a result.

Residential use at ground floor level within the defined retail frontage will not be permitted but is acceptable at ground floor level outside the defined retail frontage.

The beneficial use of upper floors or of premises without frontage onto a defined retail frontage, including residential use will be permitted where it is compatible with surrounding uses.

Norwich Local Development Framework

Norwich City Centre Shopping Floorspace Monitor

January 2007

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