

Report to Sustainable development panel

23 July 2014

Report of Head of planning service

Subject Retail Monitor 2014

Item

5

Purpose

To consider the June 2014 Retail Monitor and note the success of Norwich City Centre as a retail destination with low vacancy rates compared to national vacancy rates.

The Retail Monitor is the council's monitoring report advising of vacancy rates and changes of shop type across the city. Monitoring ensures that the council can measure the implementation of policies on retail monitoring and consider whether to implement them in a more flexible manner taking into consideration market demands and trends.

Recommendation

That the sustainable development panel notes the low vacancy rates across Norwich in all areas and the city's success as a retail destination

Corporate and service priorities

The report helps to meet the corporate priority a prosperous city.

Financial implications

There are no direct financial considerations. The retail success of the city centre will have financial implications for business rates.

Ward/s: All wards

Cabinet member: Councillor Stonard – Environment, development and transport

Contact officers

Mike Burrell, Planning Policy Team Leader 01603 212525

Sarah Ashurst, Planner (Policy) 01603 212500

Background documents

None

Report

Introduction:

1. The Retail Monitor is the council's monitoring report advising of vacancy rates and changes of shop type in the city. Monitoring ensures that the council can assess the implementation of its retail policies.
2. This report updates members from the last monitor in August 2013. The purpose of this report is to highlight to members the success of the city in terms of the current low retail vacancies. Members are asked to note this success but no further action is required.

National Policy and the Joint Core Strategy:

3. The National Planning Policy Framework (NPPF) states in paragraph 23 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".
4. The Joint Core Strategy (JCS) was adopted in March 2011, with amendments adopted in January 2014 by the three local planning authorities in the Greater Norwich Development Partnership (GNDP). The plan covers the period from 2008 to 2026.
5. Policy 11 of the JCS for Norwich city centre states that its regional centre role will be strengthened and that the retail, cultural and leisure facilities offered in the city will be expanded and enhanced through intensification of retail uses in the primary retail area and its expansion if necessary. The policy also promotes the strengthening of specialist shopping areas in secondary areas of the city centre.
6. Policy 19 promotes the strengthening of the large district centres (LDCs) at Anglia Square/Magdalen Street/St. Augustine's and at Riverside, which are at the second level of the retail hierarchy headed by the city centre. The essential role of district and local centres in meeting everyday shopping needs is also supported.
7. Development Management policies provide the detail to enable the strategic aims above to be implemented and to protect the vitality and viability of centres. This is done through policies which apply specific thresholds in different retail areas of the city for the percentage of retail uses as opposed to other leisure and service uses typically found in centres.

Norwich: An Overview

8. Norwich city centre is a thriving retail and visitor destination and, in terms of retail spend and attractiveness, among the top fifteen retail centres nationally. The city centre is the most accessible and sustainable location in the greater Norwich area for retail, leisure, office, cultural and tourism related development.

9. 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, cafés, financial services, leisure and cultural uses and offices help to support the economic vitality and health of the city centre for people of all ages throughout the day and evening.
10. Regular monitoring of change in retail frontages ensures that any thresholds applied remain relevant and necessary. The survey data reported here was collected in April 2014. It should be noted that the data reported is based on the frontages as defined in Appendix 4 of the emerging Development Management Policies DPD, some of which differ from those in the existing Replacement Local Plan, adopted in 2004. The data collected in this retail monitor is therefore not directly comparable to the retail monitor results of 2013.
11. This retail monitor report will be used to inform the Supplementary Planning Document (SPD) on retail frontages and thresholds being reported separately to this meeting.
12. Conclusions and main issues will form part of the Annual Monitoring Report (AMR) published by the GNDP.

Main Findings of the Retail Monitor:

City centre:

13. 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.
14. The vacant available floorspace in the city centre as a whole is 4.2%, a fall from 2013's figure of 5.3%. This has reduced significantly from the worst figure in the plan period of over 12% in 2010, and compares favourably to a national average of 12.2% (Local Data Company – February 2014). However, direct comparison with national rates is difficult due to methodological differences in different surveys.
15. The recent trend, of a reduction in total retail floorspace in the city centre overall since 2008, has not continued. The small increase in floorspace can be attributed to an update to data following the completion of the extension to Marks & Spencer.
16. Although the 2% decrease in retail floorspace since the start of the plan period runs counter to the aims of JCS Policy 11 to increase the amount of retailing in the city centre, it is in support of the policy's aim to increase other uses such as the early evening economy, employment and cultural and visitor functions to enhance vitality and viability.

Retail Vacancy:

17. The *floorspace* vacancy rate is 3.8% in the primary retail area. This is a significant decrease in vacant floorspace from the peak vacancy rate of 11.7% in 2010, but is marginally higher than the rate of 2.8% at the start of the plan period in 2008.

18. The current vacancy rate for retail *units* is 13.8%, the highest figure in the plan period. This negative trend, taking into consideration the reduction in the floorspace vacancy rates, implies that it is the smaller shops which are struggling in the primary area.
19. It will be important to establish whether the pattern of vacancy is concentrated in particular defined frontages or is spread more widely throughout the primary retail area.
20. The policy team is committed to investigating this issue further and the emerging Supplementary Planning Document (SPD) on Main Town Centre Uses and Retail frontages will, if necessary, advocate further flexibility in the application of the policy DM20 if a particular defined frontage is identified as having high levels of vacancy. If, however, a *widespread* pattern of vacancy is found then no further action will be taken.
21. The decrease in overall floor space by approximately 20,000 square metres in the plan period partially results from Riverside being removed from the primary area and re-designated as an LDC through the adoption of the JCS in 2011.

Retail Frontages:

22. Emerging policy DM20 divides the primary area into a number of smaller 'frontage zones' (as defined on the emerging policies map and as identified in appendix 4 to the emerging DM policies plan). The retail threshold to be applied in each of these areas, and within the secondary areas and large district centres where applicable, is set out in the Main Town Centre Uses and Retail Frontages SPD. Any threshold will be calculated with reference to the total length of ground floor frontage within the zone concerned. This measure is used, rather than floorspace or number of units, because the effect of the shop frontage presented to the street is considered to have the most obvious impact on overall character, diversity and vitality.

District and Local Centres

23. Emerging policy DM21 of the Development management policies plan establishes A1 retail use thresholds of 60% for district centres and 50% for local centres.
24. Vacancy rates in district and local centres have decreased from 2013 and are now 4.4% and 6.1% respectively. There have been increases in the total number of units which has skewed the vacancy figure, rather than the total number of vacant units decreasing.
25. The worst two performing district centres for vacancy rates in August 2013 were DC06: Earlham House and DC07: The Larkman. However, the April 2014 figures show a fall in vacancy rates compared to the previous year in these centres. At Earlham House significant work has been undertaken to improve the flatted dwellings surrounding the centre, the public open spaces and the retail units. The change at the Larkman centre can be attributed to the removal of a unit from the centre following conversion to residential, thereby reducing the number of total units which in turn pushes the vacancy percentage up.

26. The Aylsham Road/Mile Cross district centre is the second worst performing centre, with an 8.7% vacancy rate. It is hoped that the approved Morrison's food store, once built, will have a positive impact on the area as a whole. This centre is also close to exceeding the 40% non-retail threshold in policy DM21, currently standing at 39.1%.

Comparators:

27. Research has been carried out into Norwich's comparators and the availability of retail floorspace. The information presented here is taken from the Bidwells Databook for Spring 2014 which compares Norwich with Cambridge, Ipswich and Chelmsford. In addition, Oxford is now included in the databook survey. The data for Spring 2014 is displayed in the table below. As can be clearly seen, Norwich and Cambridge are the 2 most successful centres in the region.

28. Bidwells note that supply is higher in the secondary shopping areas, which although not defined as the same area as the City Council, supports the trends highlighted in our retail monitor (see paragraphs 29 and 30 of the retail monitor). Further, Chapelfield is noted as having the main supply of prime units when compared to Castle Mall. It will be interesting to note if and how this changes in future years following the investment being made by the new owners of Castle Mall.

29. In addition, Bidwells reported that Norwich's Prime Zone A rental value has risen for the first time in 5 years and now stands at £170 per sq ft. This is projected to continue to rise reaching circa £190 per sq ft by 2016. This is a strong indicator that the fortunes of the high street are changing.

Table 1: Available¹ retail floorspace in Norwich as compared to other regional centres (Source: Bidwells databook Spring 2014).

| <u>Area</u> | <u>Vacancy rate</u> | <u>Date of survey</u> |
|----------------|---------------------|-----------------------|
| Norwich | 7% | Spring 2014 |
| Cambridge | 5% | Spring 2014 |
| Ipswich | 25% | Spring 2014 |
| Chelmsford | 16% | Spring 2014 |
| Oxford | 8% | Spring 2014 |

30. The databook highlights that take up and retailer demand reached their highest levels in 2 years with the most significant letting activity relating to 15,000 sq ft of floorspace at 13-25 London Street to Cosmos restaurants group. Planning permission has been granted for change of use from retail (A1) to restaurant (A3) use (see application number 13/00903/F for more information).

¹ 'Available' floorspace is defined in the Bidwells Retail & Leisure Databook as vacant floorspace that is actively being marketed for take up.

Next Stage:

31. The Retail Monitor 2014 will be published on the website following this meeting and will be circulated to all staff in Development Management and Economic Development. In addition, Norwich BID will also be notified of publication.

Appendix 1: Retail Monitor 2014



Norwich City Council Local Plan

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



June 2014

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Introduction

Policy background

1. The National Planning Policy Framework (NPPF) states in paragraph 23 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”.
2. The Joint Core Strategy (JCS) was adopted in March 2011, with amendments adopted in January 2014 by the three local planning authorities in the Greater Norwich Development Partnership (GNDP)². The plan covers the period from 2008 to 2026.
3. Policy 11 of the JCS for Norwich city centre states that its regional centre role will be strengthened and that the retail, cultural and leisure facilities offered in the city will be expanded and enhanced through intensification of retail uses in the primary retail area and its expansion if necessary. The policy also promotes the strengthening of specialist shopping areas in secondary areas of the city centre.
4. Policy 19 promotes the strengthening of the large district centres (LDCs) at Anglia Square/Magdalen Street/St. Augustines and at Riverside, which are at the second level of the retail hierarchy headed by the city centre. The essential role of district and local centres in meeting everyday shopping needs is also supported.
5. Development Management policies provide the detail to enable the strategic aims above to be implemented and to protect the vitality and viability of centres. This is done through policies which apply specific thresholds in different retail areas of the city for the percentage of retail uses as opposed to other leisure and service uses typically found in centres.
6. This document provides monitoring details for 2013/2014 on these thresholds and on retail vacancy rates. This monitoring data is used both to assess the performance of policies and to enable their implementation.

Norwich: An Overview

7. Norwich city centre is a thriving retail and visitor destination and, in terms of retail spend and attractiveness, among the top fifteen retail centres nationally. The city centre is the most accessible and sustainable location in the greater Norwich area 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, cafés, financial services, leisure and cultural uses and offices help to support the economic

² The GNDP is made up of Broadland District Council, Norwich City Council and South Norfolk Council, working in partnership with Norfolk County Council and the Broads Authority

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 April 2014. It should be noted that the data reported is based on the frontages as defined in Appendix 4 of the emerging Development Management Policies DPD, some of which differ from those in the existing Replacement Local Plan, adopted in 2004. The data collected in this retail monitor is therefore not directly comparable to the retail monitor results of 2013.
10. This retail monitor report will be used to inform the Supplementary Planning Document (SPD) on retail frontages and thresholds currently being prepared and likely to be consulted on later in 2014.
11. Conclusions and main issues will form part of the Annual Monitoring Report (AMR) published by the GNDP.

Main Findings

1. City centre overview

12. 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.
13. The vacant available floorspace in the city centre as a whole is 4.2%, a fall from 2013's figure of 5.3%. This has reduced significantly from the worst figure in the plan period of over 12% in 2010, and compares favourably to a national average of 12.2% (Local Data Company – February 2014). However, direct comparison with national rates is difficult due to methodological differences in different surveys.
14. The recent trend of a reduction in total retail floorspace in the city centre overall since 2008 has not continued. The small increase in floorspace can be attributed to an update to data following the completion of the extension to Marks & Spencer.
15. Although the 2% decrease in retail floorspace since the start of the plan period runs counter to the aims of JCS Policy 11 to increase the amount of retailing in the city centre, it is in support of the policy's aim to increase other uses such as the early evening economy, employment and cultural and visitor functions to enhance vitality and viability.
16. Table 1 provides city centre overview data on retail floorspace, enabling comparison over the time period of the plan:

Table 1

| Norwich city centre – provision of A1 retail floorspace (totals) (sqm net) | | | | |
|--|--|---|--|---|
| | <i>ALL</i> | <i>TRADING</i> | <i>VACANT</i> | <i>CONSTRUCTION/ REFURBISHMENT</i> |
| TOTAL FLOORSPACE | | | | |
| April 2014 | 224,653 | 213,652 | 9,513 | 1,488 |
| 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 2008 | 229,120 | 213,902 | 14,248 | 970 |
| | | | | |
| TOTAL SHOP UNITS | | | | |
| April 2014 | 1,048 | 930 | 107 | 11 |
| 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 2008 | 1084 | 967 | 109 | 8 |
| 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) |
| April 20124 | | 4.9% | 4.2% | 11.3% |
| 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 2008 | | 6.2% | 6.2% | 10.0% |
| OVERALL RETAIL FLOORSPACE CHANGE | | | | |
| Since August 2013 | Increased by 544sqm (0.2% increase)⁴ | | | |
| Since July 2008 | Decreased by 2.0% | | | |

³ Not counting space which is under construction or refurbishment.

⁴ This is due to the addition of the new floorspace following the completion of the extension to Marks & Spencer.

2. The Primary Area

Retail vacancy

17. The extent of the primary area, containing the malls and main comparison goods stores, is shown on the map on page 22.
18. The *floorspace* vacancy rate is 3.8% in the primary retail area. This is a significant decrease in vacant floorspace from the peak vacancy rate of 11.7% in 2010, but is marginally higher than the rate of 2.8% at the start of the plan period in 2008.
19. The current vacancy rate for retail *units* is 13.8%, the highest figure in the plan period. This negative trend, taking into consideration the reduction in the floorspace vacancy rates, implies that it is the smaller shops which are struggling in the primary area.
20. It will be important to establish whether the pattern of vacancy is concentrated in particular defined frontages or is spread more widely throughout the primary retail area.
21. The policy team is committed to investigating this issue further and the emerging Supplementary Planning Document (SPD) on Main Town Centre Uses and Retail frontages will, if necessary, advocate further flexibility in the application of the policy DM20 if a particular defined frontage is identified as having high levels of vacancy. If, however, a *widespread* pattern of vacancy is found then no further action will be taken.
22. Table 2 provides retail floorspace data for the primary area:

Table 2

| Primary shopping area (excluding Riverside from 2013 onwards as removed by JCS Adoption in March 2011) – A1 retail floorspace (sqm net) | | | | |
|---|----------------|---|---|--|
| | <i>ALL</i> | <i>TRADING</i> | <i>VACANT</i> | <i>CONSTRUCTION/ REFURBISHMENT</i> |
| TOTAL FLOORSPACE | | | | |
| April 2014 | 155,884 | 149,059 | 5,865 | 960 |
| 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 2008 | 175,028 | 168,511 | 6,434 | 83 |
| | | | | |
| TOTAL SHOP UNITS | | | | |
| April 2014 | 579 | 499 | 74 | 6 |
| 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 2008 | 584 | 537 | 46 | 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 FLOORSPACE ⁵ <i>(Vacancy / All x 100)</i> | VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i> |
| April 2014 | | 4.4% | 3.8% | 13.8% |
| 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 2008 | | 3.7% | 3.7% | 7.9% |

⁵ Not counting space which is under construction or refurbishment.

Retail Frontages

23. Emerging policy DM20 divides the primary area into a number of smaller 'frontage zones' (as defined on the emerging policies map and as identified in appendix 4 to the emerging DM policies plan). The retail threshold applicable in each of these areas is yet to be set, but will be contained in the SPD, to be consulted on later in 2014. Any threshold will be 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.
24. The Timberhill/Red Lion Street area is a new frontage zone resulting from consolidation of areas previously in separate frontages and the reclassification of some units from the secondary area to the primary area. At this time it is not possible to comment on the high levels of non-retail in this frontage, but future development proposals in this area will need to take account of any thresholds in the emerging SPD.
25. Table 3 provides data on the percentage of retail and non-retail uses in the primary area retail frontage zones in April 2014. This data will be used as the basis for establishing the new thresholds in the SPD.

Table 3

| PRIMARY AREA REATAIL FRONTAGE ZONES | | | |
|--|-----------------------------|------------------------------------|---|
| Retail and Non-retail uses in April 2014 | | | |
| FRONTAGE ZONE ⁶ | TOTAL MEASURED FRONTAGE (M) | TOTAL NON-RETAIL FRONTAGE (APR 14) | % A1 RETAIL / NON A1 RETAIL SPLIT (APR 14) (Frontage) |
| <i>PRIMARY RETAIL AREA CORE FRONTAGE ZONES</i> | | | |
| PC01: Gentleman's Walk/Haymarket/Brigg Street | 872.9 | 101.4 | 88.4% / 11.6% |
| PC02: Castle Mall (Levels 1 & 2) | 875.1 | 38.3 | 95.6% / 4.4% |
| PC03: Chapelfield, upper & lower Merchants Hall and St Stephens Arcade | 686.0 | 19.5 | 97.2% / 2.8% |
| <i>FRONTAGE ZONES IN THE REST OF THE PRIMARY RETAIL AREA</i> | | | |
| PR01: Back of the Inns/Castle Street area | 729.6 | 204.9 | 71.9% / 28.1% |
| PR02: The Lanes east (Bedford Street/Bridewell Alley) | 1151.2 | 218.7 | 81% / 19% |
| PR03: St Stephens Street/Westlegate | 822.4 | 118.5 | 85.6% / 14.4% |
| PR04: Castle Meadow north | SEE FOOTNOTE 7 | | |
| PR05: Chapelfield Plain ⁷ | SEE FOOTNOTE 7 | | |
| PR06: Timberhill/Red Lion Street | 436.0 | 129.8 | 70.2% / 29.8% |

⁶ See Section 9 for definitions and maps.

⁷ There is no defined frontage in this zone

3. The Secondary Area

26. Map 3 on page 24 shows the extent of the secondary area.

27. In the secondary area the vacant *unit* rate is 4.3%, the lowest rate in the plan period and significantly lower than the peak vacant unit rate of 11.2% in 2009. This shows that smaller independent shops in areas like the Norwich Lanes and St. Benedict's Street are thriving unlike those in the primary area.

28. The *floorspace* vacancy rate in the secondary area is 1.2%, the lowest figure in the plan period by a significant margin.

Table 4

| Secondary Shopping Areas - A1 retail floorspace (sqm net) | | | | |
|---|---------------|---|---|--|
| | <i>ALL</i> | <i>TRADING</i> | <i>VACANT</i> | <i>CONSTRUCTION / REFURBISHMENT</i> |
| TOTAL FLOORSPACE | | | | |
| April 2014 | 21,958 | 21,569 | 273 | 116 |
| 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 2008 | 18,167 | 17,604 | 1,022 | 81 |
| | | | | |
| TOTAL SHOP UNITS | | | | |
| April 2014 | 185 | 177 | 5 | 3 |
| 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 2008 | 194 | 176 | 15 | 3 |
| | | | | |
| 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 ⁸ <i>(Vacancy / All x 100)</i> | VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i> |
| April 2014 | | 1.8% | 1.2% | 4.3% |
| August 2013 | | 3.9% | 3.3% | 5.9% |
| January 2011 | | 6.6% | 4.9% | 6.8% |
| January 2010 | | 7.1% | 6.6% | 9.3% |
| July 2008 | | 5.6% | 5.7% | 7.7% |

⁸ Not counting space which is under construction or refurbishment.

4. Large District Centres

29. Limited direct comparison in changes over the plan period is possible for the LDCs as there have been changes to the areas covered with the re-designation of Riverside. Map 4 on page 24 shows the extent of the LDCs.
30. Vacant floorspace in the LDCs now stands at 2.4%. This is an increase on 2013's figure of 1%. However only 2 monitors have been produced since the re-designation of Riverside. Future monitoring will highlight any trends regarding vacancy.
31. Riverside continues to have a strong offer as a largely car based retail destination with historically low vacancy rates. However, emerging policy DM18 (Retail, leisure and other main town centre uses) of the Development management policies plan seeks to resist further development at Riverside unless it provides for "sustainable transport improvements to significantly enhance accessibility by public transport and pedestrian and cycle linkages from the retail park to the primary and secondary retail areas, sufficient to offset any potentially harmful impacts on traffic congestion and highway safety arising from additional trip generation associated with the new development."
32. The Anglia Square/Magdalen Street/St Augustine's LDC offers a diverse range of local convenience retailing and services, with only 10 vacant units out of 140, or 7.1%. This relatively low percentage vacancy rate compares favourably with the highest unit vacancy rates of up to 20.7% early in the plan period. Floorspace vacancy rates (3.2% in April 2014) also compare highly favourably against the highest rates of up to 18.8% early in the plan period.

Table 5

| Magdalen Street / St Augustines Street / Anglia Square / Albion way (Riverside) – A1 Retail floorspace (sqm net) (including Riverside from 2013 onwards due to JCS adoption and re-designation) | | | | |
|---|---------------|---|---|--|
| | <i>ALL</i> | <i>TRADING</i> | <i>VACANT</i> | <i>REFURBISHMENT</i> |
| TOTAL FLOORSPACE | | | | |
| April 2014 | 32,647 | 31,594 | 784 | 269 |
| 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 2008 | 18,139 | 15,017 | 3,031 | 91 |
| | | | | |
| TOTAL SHOP UNITS | | | | |
| April 2014 | 140 | 130 | 8 | 2 |
| 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 2008 | 135 | 111 | 22 | 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 ⁹ <i>(Vacancy / All x 100)</i> | VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i> |
| April 2014 | | 3.2% | 2.4% | 7.1% |
| 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 2008 | | 16.7% | 16.8% | 16% |

⁹ Not counting space which is under construction or refurbishment.

5. Rest of the City Centre

- 33. This area covers all shops within the city centre but not included in the defined areas discussed above.
- 34. Since the 2013 retail monitor this now excludes St. Stephens Road and parts of Ber Street as a result of their re-designation following submission on the Development management policies plan.
- 35. Vacancy rates in terms of both the number of units and percentages in the rest of the city centre have declined slightly over the plan period. However, there has been a small increase since 2013.

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 | | | | |
| April 2014 | 14,164 | 11,430 | 2,591 | 143 |
| 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 2008 | 17,786 | 13,310 | 3,761 | 765 |
| | | | | |
| TOTAL SHOP UNITS | | | | |
| April 2014 | 144 | 124 | 19 | 1 |
| 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 2008 | 171 | 143 | 26 | 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 FLOORSPACE¹⁰ <i>(Vacancy / All x 100)</i> | VACANCY AS A PROPORTION OF ALL SHOP UNITS <i>((Vacant + Refurbishment) / All x 100)</i> |
| April 2014 | | 19.3% | 3% | 13.9% |
| 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 2008 | | 21.1% | 22% | 15.2% |

¹⁰ Not counting space which is under construction or refurbishment.

6. District and Local Centres

36. Emerging policy DM21 of the Development management policies plan establishes A1 retail use thresholds of 60% for district centres and 50% for local centres.
37. Vacancy rates in district and local centres have decreased from 2013 and are now 4.4% and 6.1% respectively. There have been increases in the total number of units which has skewed the vacancy figure, rather than the total number of vacant units decreasing.

District Centres

38. Out of the 180 units in the 9 district centres, 8 units are vacant. This figure is the same as at January 2011 and August 2013. However, given the increase in the number of centres following policy changes, and as a result an increase in total units, the vacancy percentage has decreased from 8.7% to 4.4%. This figure is similar to the 3.1% vacancy rate in district centres at the start of the plan period.
39. The worst two performing district centres for vacancy rates in August 2013 were DC06: Earlham House and DC07: The Larkman. However, the April 2014 figures show a fall in vacancy rates compared to the previous year in these centres. At Earlham House significant work has been undertaken to improve the flatted dwellings surrounding the centre, the public open spaces and the retail units. The change at the Larkman centre can be attributed to the removal of a unit from the centre following conversion to residential, thereby reducing the number of total units which in turn pushes the vacancy percentage up.
40. The Aylsham Road/Mile Cross district centre is the second worst performing centre, with an 8.7% vacancy rate. It is hoped that the approved Morrisons food store, once built, will have a positive impact on the area as a whole. This centre is also close to exceeding the 40% non-retail threshold in policy DM21, currently standing at 39.1%.
41. Of the 180 units in the district centres, the percentage of non-retail units is 41.6%, lower than the 2013 and 2011 levels, despite the increase in numbers of units.
42. Four of the 10 centres have exceeded the 60% threshold for non-retail uses in emerging policy DM21:
- a. DC01 – Bowthorpe
 - b. DC03 – Eaton centre
 - c. DC04 – Plumstead Road
 - d. DC07 – The Larkman
43. In August 2013 policy thresholds were exceeded in 5 of the then 7 district centres. This has fallen to 4 of 10 district centres in April 2014.

Table 7 District Centres

| DC ref | DC name | Total Units | Vacant units | % vacant | Non retail units | % non-retail | Commentary |
|--------------|--------------------------------|----------------|--------------|----------|------------------|--------------|--|
| DC01 | Bowthorpe | 17 | 1 | 5.9% | 8 | 47.1 % | |
| DC02 | Drayton Road | 15 | 0 | 0% | 4 | 26.7 % | |
| DC03 | Eaton centre | 19 | 0 | 0% | 10 | 52.6 % | 3 new units added including the Eaton Post Office. |
| DC04 | Plumstead Road | 32 | 1 | 3.1% | 16 | 50% | 5 new units added |
| DC05 | Aylsham Road/Mile Cross | 23 | 2 | 8.7% | 9 | 39.1 % | |
| DC06 | Earlham House | 17 | 2 | 11.8% | 4 | 23.5 % | Vacancy levels have fallen from 2013 following completion of the renovation works. |
| DC07 | The Larkman | 13 | 0 | 0% | 6 | 46.2 % | 1 unit removed following conversion to residential |
| DC08 | Dereham Road/Distillery Square | 37 | 2 | 5.4% | 16 | 5.4% | Newly defined as a District centre. Boundary amended to remove Exeter Street car park – now developed for housing. |
| DC09 | Hall Road | Not yet built. | | | | | |
| DC10 | Sprowston Road/Shipfield | 7 | 0 | 0% | 2 | 28.6 % | Newly defined as district centre. Upgraded following completion of Aldi. |
| TOTAL | | 180 | 8 | | 75 | | |

Local centres

44. Table 8 below shows vacancy and non-retail units and percentages of units for the 28 local centres. Limited comparison is made to 2013 figures given the changes in boundaries, the addition of three new local centres, and the upgrading of Sprowston Road/Shipfield and Dereham Road/Distillery Square to district centres resulting from changes in policy in the emerging local plan.
45. Of the 327 units, the number of vacant units is 20, representing a vacancy rate of 6.1% compared to the 2013 figure of 9.7%.
46. The percentage of non-retail units fell to 39.4%, a decrease from 2013 when 40.6% was recorded. Whilst these figures are not directly comparable due to policy changes, they do show the strong performance of local centres across the city.
47. The DM21 policy threshold of not less than 50% retail has been exceeded in the following local centres:
- a. LC02: Hall Road / Queens Road
 - b. LC07: St Augustine's Gate
 - c. LC12: Woodcock Road
 - d. LC15: Sprowston Road/Silver Road
 - e. LC26: UEA
 - f. LC28: Magdalen Road/Clarke Road
 - g. LC29: Aylsham Road/Copenhagen Way, and;
 - h. LC30: St Stephens Road
48. The following local centres are recorded as having close to 50% non-retail. Any planning approvals for non-retail uses are likely to cause the policy threshold to be exceeded:
- a. LC06: Unthank Road and;
 - b. LC20: Colman Road, The Parade.

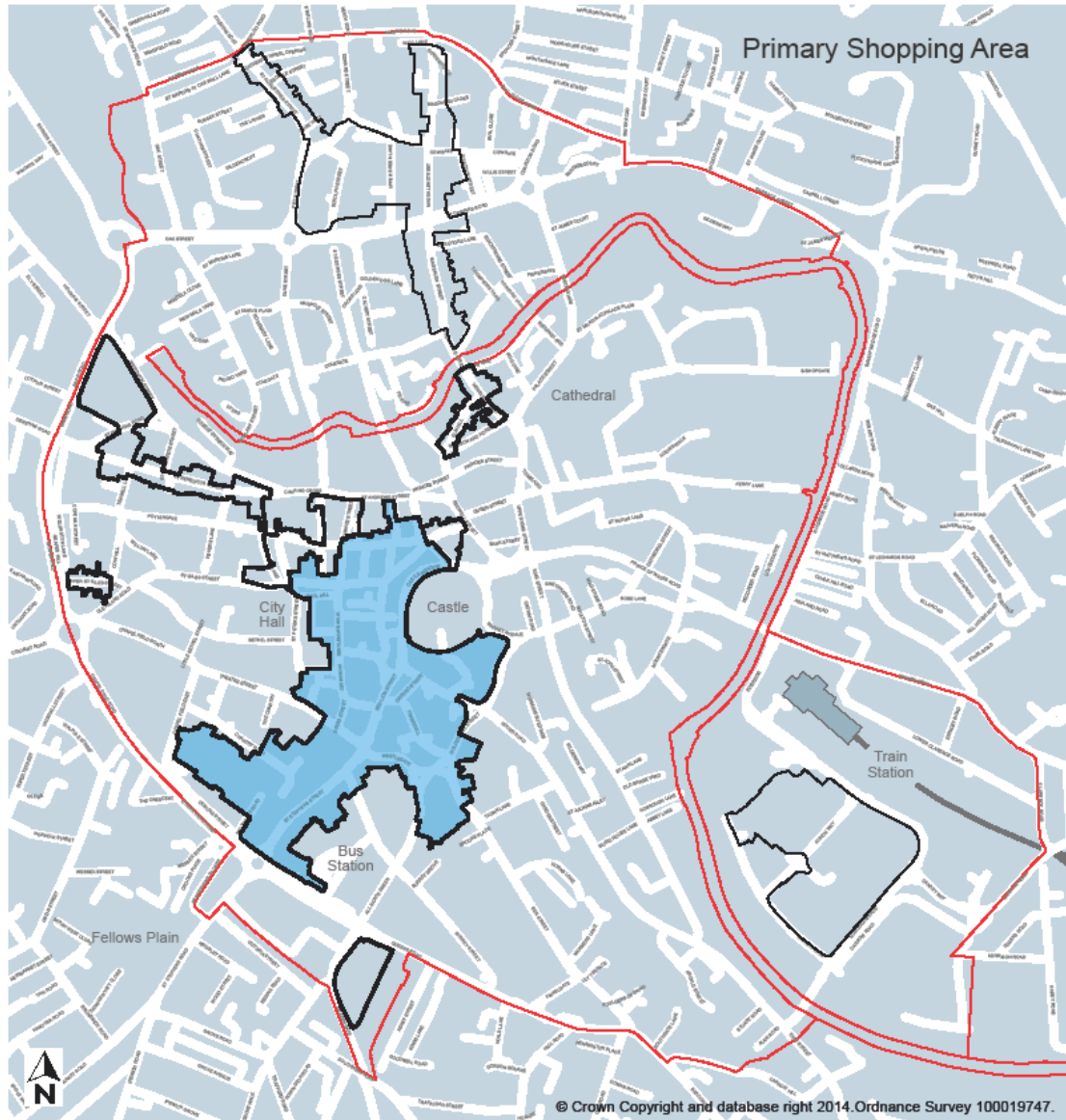
Table 8 Local Centres

| LC ref | LC name | Total Units | Vacant units | % vacant | Non retail units | % non-retail |
|--|-------------------------------|-------------|--------------|----------|------------------|--------------|
| LC01 | Hall Road/Trafalgar Street | 7 | 0 | 0% | 2 | 28.6% |
| LC02 | Hall Road/Queens Road | 28 | 4 | 14.3% | 14 | 50.0% |
| LC03 | Hall Road/Southwell Road | 7 | 0 | 0% | 3 | 42.9% |
| LC04 | Grove Road | 14 | 0 | 0% | 5 | 35.7% |
| LC05 | Suffolk Square | 9 | 0 | 0% | 4 | 44.4% |
| LC06 | Unthank Road | 42 | 4 | 9.5% | 20 | 47.5% |
| LC07 | St Augustine's Gate | 7 | 1 | 14.3% | 5 | 71.4% |
| LC08: Dereham Road/Distillery Square – Local centre upgraded to District centre. | | | | | | |
| LC09 | Aylsham Road/Junction Road | 8 | 1 | 12.5% | 0 | 0% |
| LC10 | Aylsham Road/Glenmore Gardens | 12 | 2 | 16.7% | 5 | 41.7% |
| LC11 | Aylsham Road/Boundary Road | 12 | 1 | 8.3% | 3 | 25% |
| LC12 | Woodcock Road | 6 | 0 | 0% | 3 | 50% |
| LC13 | Catton Grove Road/Ring Road | 12 | 0 | 0% | 3 | 25% |
| LC14 | Magdalen Road | 12 | 1 | 8.3% | 5 | 41.7% |
| LC15 | Sprowston Road/Silver Road | 8 | 1 | 12.5% | 4 | 50% |
| LC16: Sprowston Road/Shipfield – Local centre upgraded to District centre | | | | | | |
| LC17 | Bishop Bridge Road | 7 | 2 | 28.6 | 2 | 28.6 |
| LC18 | Earlham West Centre | 20 | 1 | 5% | 8 | 40% |
| LC19 | Colman Road/The Avenues | 16 | 1 | 6.3% | 4 | 25% |
| LC20 | Colman Road, The Parade | 11 | 1 | 9.1% | 5 | 45.5% |
| LC21 | Woodgrove Parade | 10 | 0 | 0% | 3 | 30% |
| LC22 | St John's Close/Hall Road | 10 | 0 | 0% | 3 | 30% |
| LC23 | Tuckswood centre | 5 | 0 | 0% | 1 | 20% |
| LC24 | Witard Road, Heartsease | 9 | 0 | 0% | 3 | 33.3% |
| LC25 | Clancy Road, Heartsease | 5 | 0 | 0% | 2 | 40% |
| LC26* | UEA | 8 | 0 | 0% | 6 | 75% |
| LC27* | Long John Hill | 5 | 0 | 0% | 1 | 20% |
| LC28* | Magdalen Road/Clarke Road | 8 | 0 | 0% | 4 | 50% |
| LC29* | Aylsham Road/Copenhagen Way | 5 | 0 | 0% | 4 | 80% |
| LC30* | St Stephens Road | 12 | 0 | 0% | 7 | 58.3% |
| TOTAL | | 327 | 20 | | 129 | |

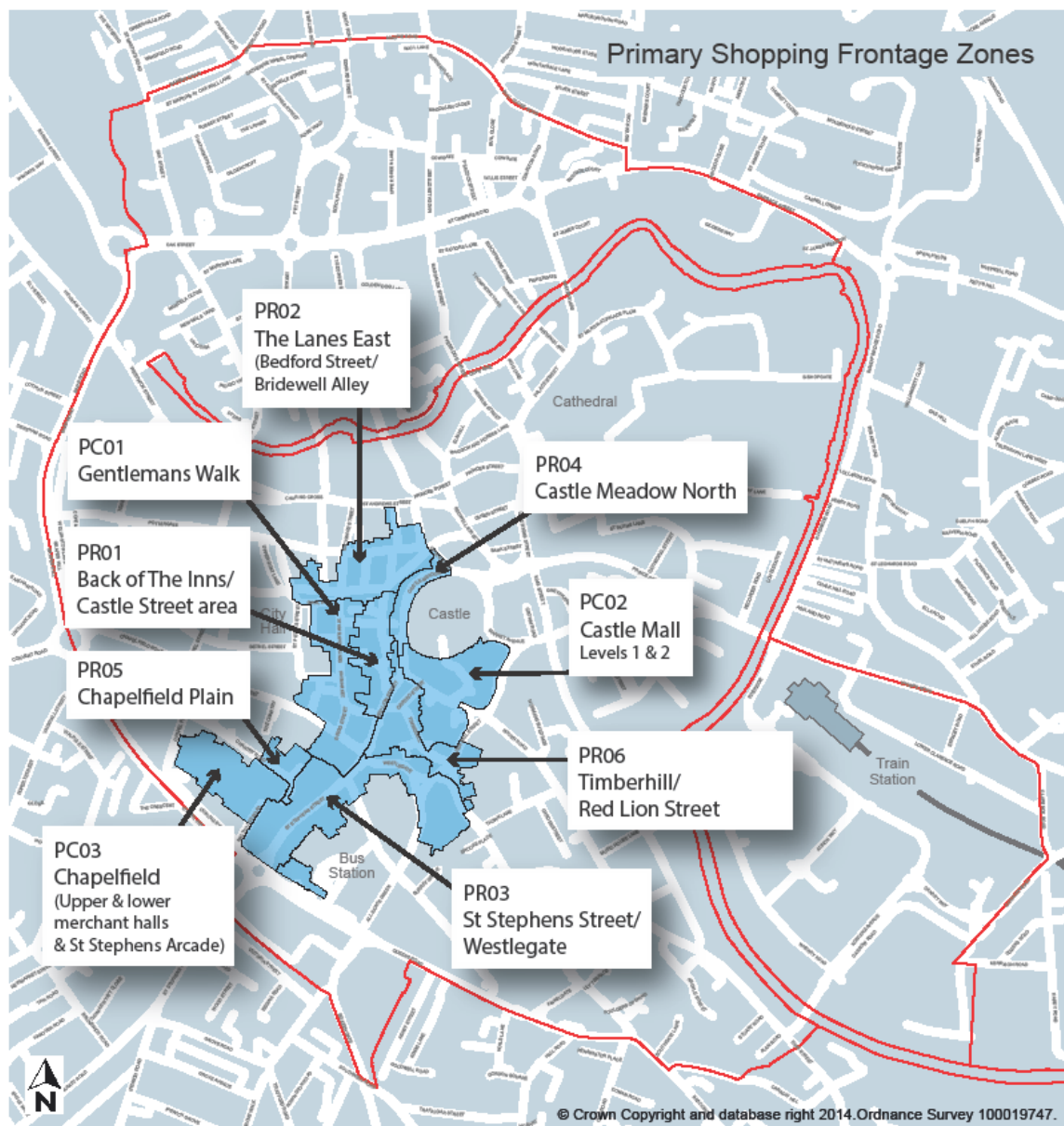
*Denotes new local centre

Supporting Maps:

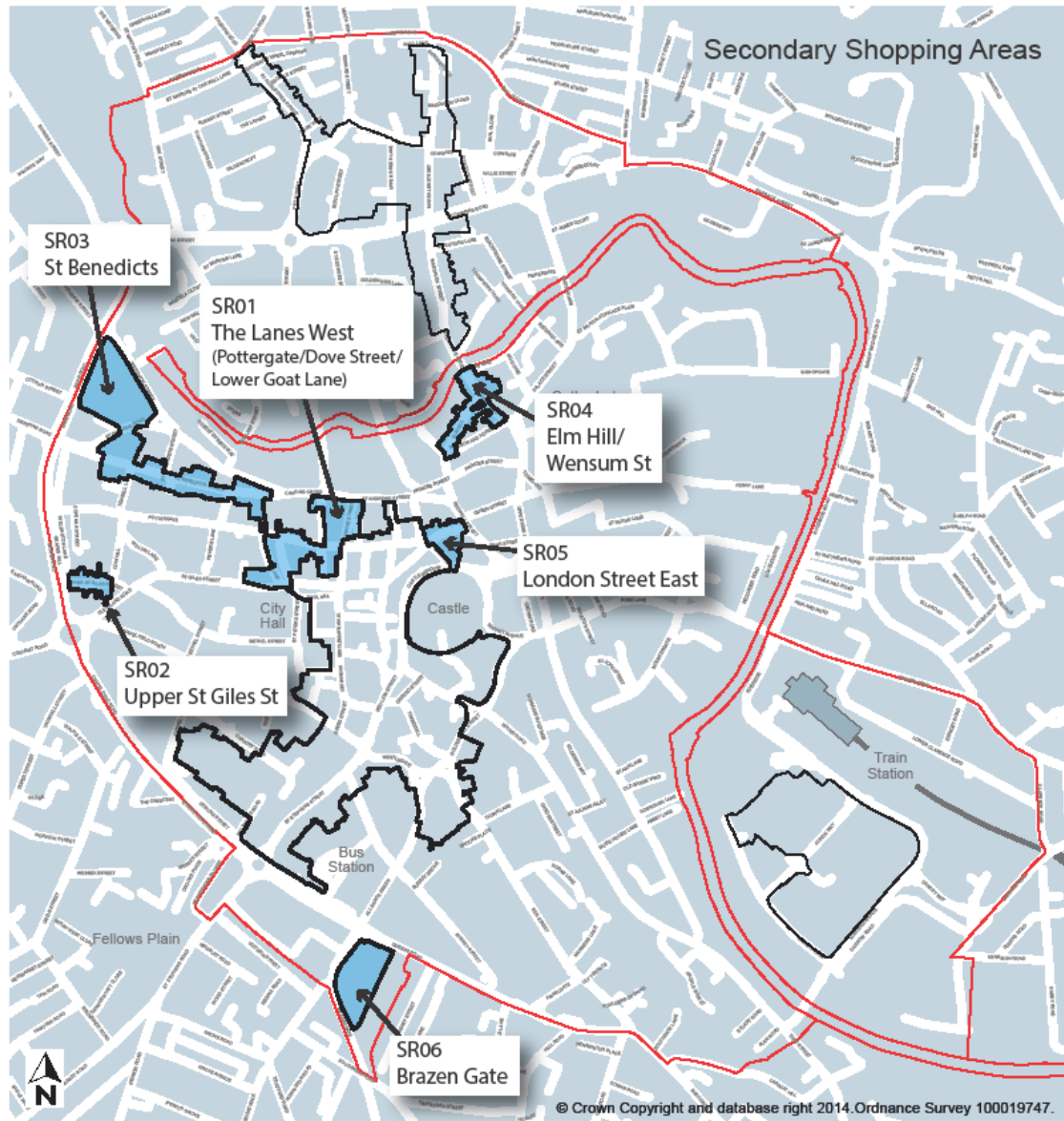
1. Primary shopping area



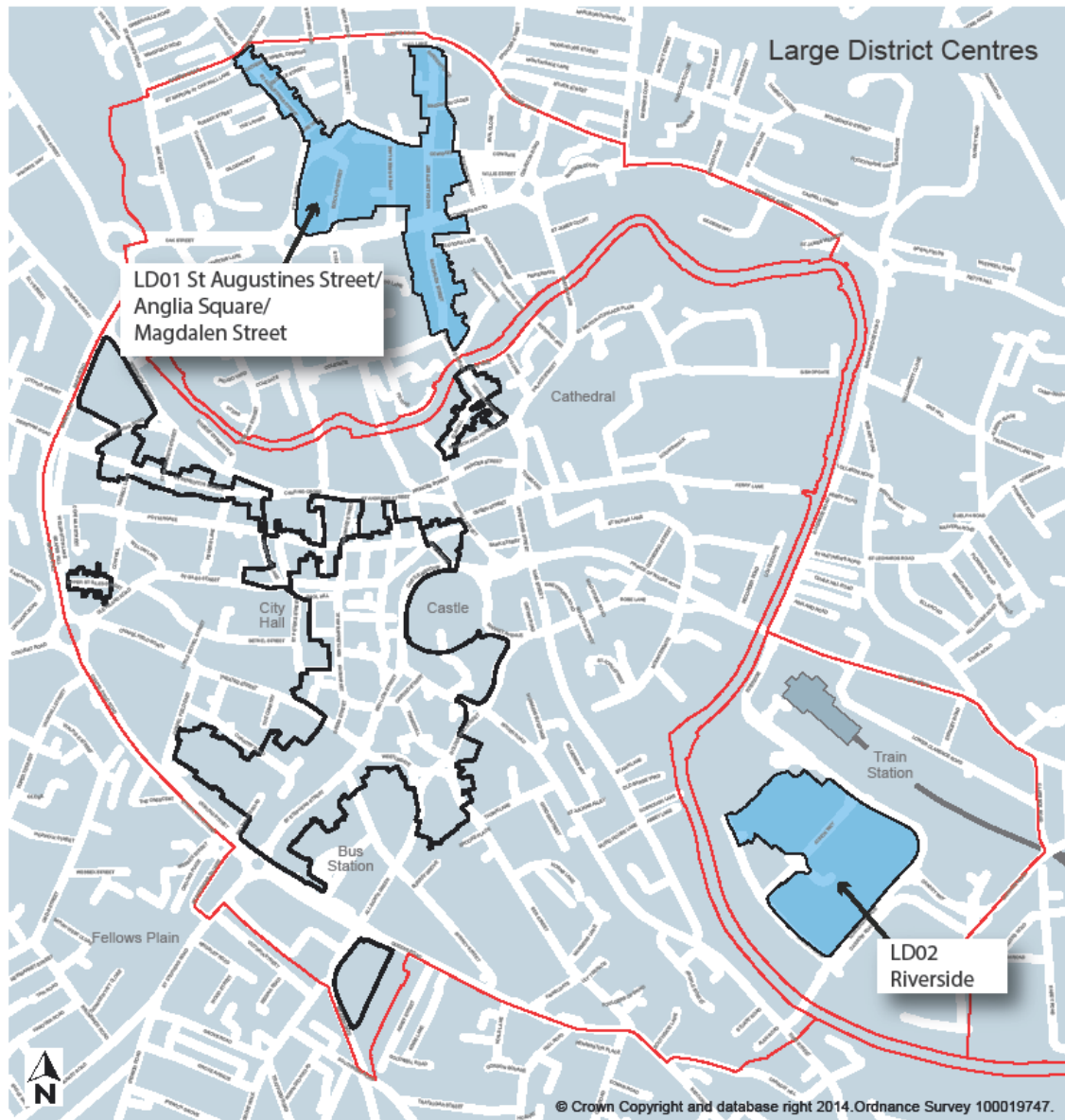
2. Primary area frontage zones:



3. Secondary shopping areas



4. Large district centres (Magdalen Street / Anglia Square / St Augustine's Street / Riverside)



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