



# NORWICH City Council

**Committee Name:** Sustainable development panel

**Committee Date:** 08/06/2022

**Report Title:** March 2022 Norwich City Centre Shopping and Town Centre Floorspace Monitor

**Portfolio:** Councillor Stonard, Cabinet member for inclusive and sustainable growth

**Report from:** Head of planning and regulatory services

**Wards:** Mancroft and Thorpe Hamlet

## OPEN PUBLIC ITEM

### Purpose

To report and discuss the key findings of the March 2022 Norwich City Centre Shopping and Town Centre Floorspace Monitor.

The Norwich City Centre Shopping and Town Centre Floorspace Monitor is the council's monitoring report advising of vacancy rates and changes of shop type across the city centre. 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 or to take an alternative approach taking into consideration market demands and trends. The March 2022 monitor is an update to the July 2021 monitor rather than containing a full analysis.

### Recommendation:

It is recommended that Members note the findings of the March 2022 Norwich City Centre Shopping and Town Centre Floorspace Monitor.

### Policy Framework

The Council has five corporate aims, which are:

- People live independently and well in a diverse and safe city.
- Norwich is a sustainable and healthy city.
- Norwich has the infrastructure and housing it needs to be a successful city.
- The city has an inclusive economy in which residents have equal opportunity to flourish.
- Norwich City Council is in good shape to serve the city.

This report addresses the first four aims.

This report also helps to implement the local plan for the city and supports the delivery of the Greater Norwich local plan's policies.

This report helps to meet the business and the local economy objective of the COVID-19 Recovery Plan.

## Report Details

1. This report presents the key findings of the March 2022 survey of Norwich city centre which measures vacancy rates and changes of shop type for both retail and town centres uses. The last survey was undertaken in July 2021 and due to unprecedented change taking place within the city, members of this Sustainable Development (SD) Panel agreed in November 2021 that the survey work should be undertaken more frequently. However members of the SD panel acknowledged that this is a resource intensive piece of work and rather than producing a full report each time, it would be appropriate to only report the key findings every six months with a full report being produced annually. This March 2022 survey therefore is an update to the July 2021 report and only reports the key figures and findings rather than providing a full analysis.
2. It is proposed to produce a full report later in 2022 which will enable officers to gain a better understanding of how our centres have recovered from the pandemic and also how the city centre is coping with additional challenges such as rising inflation and the cost of living crisis. The next survey will also include the Local and District Centres, which were not surveyed in March 2022.

### Main findings

3. The [July 2021 report](#) showed that there had been a significant rise in retail vacancy rates since the previous full report which was produced in October 2019 with vacant floorspace reaching 14.5% and vacant units reaching 14.1%. This was unsurprising given the challenging circumstances faced by retailers and given that there have been three lockdowns due to the pandemic when all shops and leisure facilities have been forced to close other than essential retail. Furthermore for much of the period footfall within the city centre had been extremely low partly due to the 'work at home' message and also due to people choosing to either shop locally or turning to online retailing. The findings did however show how important our smaller independent retailers were with the high vacancy rates largely being attributed to the closure of a number of multiples with large floorspaces whereas the smaller shops in the secondary retail area and within the Magdalen Street, Anglia Square and St Augustine's Large District Centre were much more resilient.
4. The March 2022 survey shows an overall improvement in shop vacancy rates for shop units (reduction from 14.1% in July 2021 to 13.8% in the city centre as a whole) and other than within the Large District Centre, the city is moving in a positive direction. In terms of all vacant floorspace, parts of the city centre are seeing a reduction in vacancies whilst other areas continue to see an increase. This further supports the findings from the July 2021 monitor that it is the smaller retailers (of which many are independent) that are performing better whereas many of the larger units remain vacant.
5. It is noticeable how busy and vibrant the city centre is and footfall data from Centre for Cities<sup>1</sup> supports this observation. Data from the Centre for Cities tracker shows that overall footfall (and spend) is now higher than it was pre pandemic.

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<sup>1</sup> [High streets recovery tracker | Centre for Cities](#)

6. The next year will continue to be a challenge for our high street as retailers and other town centre businesses continue to recover from the pandemic. However as we emerge from the pandemic, there are other factors that could impact upon the high street this year. In particular with inflation at a near 30 year high, retailers will be faced with rising costs whilst consumers will see their real income and disposable income reduced.
7. Despite this context, investment is taking place or being planned in the city centre. For example Royal Arcade has recently changed hands and its new owners are understood to be planning investment. Other changes include Morrisons moving into the former Top Shop building, the redevelopment of the former Tesco Metro on Gaol Hill for hotel and retail use, and further planned investment in both Chantry Place and Castle Quarter shopping centres. In addition Hay Hill is due to benefit from investment through the Towns Fund to enhance this key public space, which will encourage its extended use and enable hosting of cultural activities and events.
8. It will therefore be important to carry out another survey in around six to nine months time to see how the city centre and our local and district centres are performing. Further to a full analysis later in 2022 it will also be useful to consider and discuss what implications the findings have both in terms of informing planning decisions and considering the future direction of our planning policies, particularly as we look at commencing work on the review of Norwich's Development Management Policies Plan.

## **Consultation**

9. Due to the nature of the report, no public or stakeholder consultation has taken place. The portfolio holder has been briefed on the findings of the report.

## **Implications**

10. This report is a largely for information only and a more comprehensive report will be produced later in the year following another survey in around six months' time. The findings of these retail monitoring reports do however have implications both in terms of informing planning decisions and in terms of considering future policies. The past few monitoring reports have flagged up that there is a need to be more flexible and therefore it will be necessary to review our existing Development Management Policies and to consider which are still fit for purpose. These monitoring reports can help us consider the likely direction of travel for our town centre policies in the future. Furthermore, it will be necessary to consider what implications there are in terms of any site allocations, particularly in terms of strategic allocations such as Anglia Square.

## **Financial and Resources**

11. Any decision to reduce or increase resources or alternatively increase income must be made within the context of the council's stated priorities, as set out in its Corporate Plan 2019-22 and Budget.
12. There are no proposals in this report that would reduce or increase resources. Staff time to carry out the monitor is met from existing budgets.

## Legal

13. There are no legal implications.

## Statutory Considerations

Consideration	Details of any implications and proposed measures to address:
Equality and Diversity	The report is not likely to affect people because of their protected characteristics.
Health, Social and Economic Impact	Whilst the report itself does not have any health, social and economic impacts, the findings of the retail monitor should be used to inform future planning decisions and the future direction of travel in terms of town centre and retailing policies. These could have quite significant social and economic impacts. These impacts will need to be assessed as part of the decision making process or when considering what changes will need to be made to our policies in the future.
Crime and Disorder	No likely implications
Children and Adults Safeguarding	No likely implications
Environmental Impact	No likely implications

## Risk Management

Risk	Consequence	Controls Required
No risks have been identified in terms of the publication of this report.	n/a	n/a

## Other Options Considered

14. The findings of the last few monitoring reports would indicate that changes will be needed to our policies in the future. One option could be to review the policies now; however, we do not have the resources to do this currently and it is felt best to await the outcome of the public examination of the GNLP and greater clarity on planning reforms.

## Reasons for the decision/recommendation

15. The recommendation is to note the findings. Further to the next monitor, which will be undertaking in around 6 months' time, consideration will need to be given to what implications the findings have both in terms of informing planning decisions and considering the future direction of our planning policies. It is not recommended to make changes to policies at this point in time due to resource implications and the need for greater clarity on proposed changes to the planning system; however, it is useful to begin discussions.

**Background papers:** None

**Appendix 1:** Norwich City Centre Shopping and Town Centre Floorspace Monitor  
Survey at March 2022

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# Norwich City Centre Shopping and Town Centre Floorspace Monitor

## Survey at March 2022 (Update to survey July 2021)

### Introduction

1. Norwich City Centre is the pre-eminent regional centre in the East of England and in order to get a picture of how our high street is performing and how it changes over time regular monitoring of our city centre is carried out. The last full survey of the city centre was carried out in July 2021 and a report was published entitled [Norwich City Centre Shopping and Town Centre Floorspace Monitor & Local & District centres Monitor \(Survey at July 2021\)](#). In previous years the report has only measured vacancy rates for retail and provided data on the total amount of retail floorspace; however in 2021 for the first time the report also considered vacancy rates for all town centre uses which better reflects the policy approach for allowing greater flexibility so our high streets can evolve in order for them to thrive.
2. Norwich city centre is seeing unprecedented change and as a result it is important to monitor our high street more frequently. However this is very resource intensive and therefore whilst it is proposed to undertake the survey work for the city centre every six to nine months, rather than producing a full report every time, it is planned to alternate between producing a full report and an update to the previous report. This March 2022 survey therefore is to be reported as an update to the July 2021 report and it is then proposed to carry out a further survey of the city centre towards the end of the year and to produce a full report at that time. It is considered that an additional six to nine months will enable officers to gain a better understanding of how our centres have recovered from the pandemic and also how it is coping with additional challenges such as the cost of living crisis. The next survey will also include the Local and District Centres, which were not surveyed in March 2022.

### Summary of findings from July 2021

3. The July 2021 report showed that there had been a significant rise in retail vacancy rates since the previous full report which was produced in October 2019. This was unsurprising given the challenging circumstances faced by retailers and given that there have been three lockdowns due to the pandemic when all shops and leisure facilities have been forced to close other than essential retail. Furthermore for much of the period footfall within the city centre had been extremely low partly due to the 'work at home' message and also due to people choosing to either shop locally or turning to online retailing.
4. The headline figures and main findings from the July 2021 report were as follows:
  - a) The vacant available retail *floorspace* in the city centre was 14.5% which was a significant increase from 2019's figure of 5.5%.
  - b) The percentage of vacant *units* also increased from 10.1% to 14.1%. Whilst this was a significant increase of +4% it did still compare favourably to the

average GB retail vacancy rate of 15.8% (Local Data Company, September 2021<sup>1</sup>).

- c) In terms of all town centre uses, vacant floorspace in July 2021 was 16.2% and vacant units was 15.2% which were both around 1% higher than retail only vacancies.
- d) Overall the amount of retail floorspace in the city centre decreased slightly over the monitoring period. The amount of retail floorspace reduced by 1,534m<sup>2</sup> which was a 0.7% decrease.
- e) Between October 2019 and July 2021 a large number of national chains were lost from the city centre whereas independent shops, particularly within the secondary retail area and the Magdalen Street Large District centre, were more resilient.
- f) Within the Primary retail area vacant available floorspace increased from an extremely low rate of 4.1% in October 2019 to 14.5% in July 2021.
- g) Retail vacancies continued to increase in the secondary retail areas and in terms of available floorspace increased to 23.1%. The high vacancy rate was primarily due two out of four units within the Cathedral Retail Park being vacant. If these two vacant units were omitted from both the vacant floorspace and total floorspace, the vacancy rate in the secondary retail area was only 6.7% which was well below the national average and one of the lowest in the city centre. This showed that this secondary retail area (excluding the Cathedral retail park) was performing well in providing independent retail diversity and by adapting rapidly it appeared that it has remained resilient during the pandemic.
- h) In the Large District Centres, vacancy rates increased from 3.3% in 2019 to 9.1% in July 2021. This was still considered a low figure for a shopping area which did not form a central part of the city's retail offer. The vacancy rate in Riverside was 13.7% for floorspace and 19.0% for units whereas the Magdalen Street, Anglia Square and St Augustine's Large District Centre had significantly lower rates of vacancies at 7.0% for floorspace and 10.8% for units. The low vacancy rates in the Magdalen Street, Anglia Square and St Augustine's Large District Centre also corresponded to the Local Data Companies findings that independents continued to be more resilient than multiples with growth in independents being driven by the convenience (convenience stores, grocers, butchers and bakers) and leisure sector (cafes and fast food).
- i) In the rest of the city centre (streets outside the defined areas), vacant available floorspace increased significantly from 5.9% in 2019 to 13.7% in 2021. Historically available vacancy rates have been fairly high in the rest of the city centre with for example in 2014 vacancies being 18.3%; however in October 2019 the rate was exceptionally low at only 5.9% which was a bit of an anomaly. The percentage of vacant retail *units* in the rest of the city centre more than doubled from 22 units (9.2%) in October 2019 to 25 units (19.4%)

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<sup>1</sup> Local Data Company, "Looking Beyond Lockdown: GB Retail and Leisure Market Analysis, H1 2021" (September 2021)



in July 2021. Whilst this was a significant increase it is no higher than it was in June 2018.

### **Main findings of the March 2022 survey**

5. A survey of the city centre was carried out in March 2022. Tables 1 to 10 set out the main figures for Norwich city centre from the March 2022 survey. The main findings of the monitor are as follow:
- a) Vacant available retail floorspace in the city centre as a whole is 15.0% which is an increase from the 2021 figure of 14.5%. However city centre retail vacancy rates 'as a proportion of all retail floorspace' (included premises under refurbishment) has remained stable at 15.2% (see table 1). Given the pandemic it is not a surprise that vacancy rates for floorspace are high particularly given the number of multiples that have closed in the last few years many of which have significant floorspaces.
  - b) The percentage of vacant retail *units* in the city centre has decreased from 14.1% in July 2021 to 13.8% in March 2022 (see table 1). This would indicate that some of Norwich's smaller vacant units have been occupied. Nationally GB vacancy rates have also seen a decrease. The Local Data Company<sup>2</sup> report that during the first quarter of 2022 14.1% of retail units were vacant which is a 0.3 percentage point down from Q4 2021.
  - c) When taking account of all town centre uses the vacancy rates from Norwich city centre increases by around 0.5%. In July 2021 the difference was around 1% (see tables 2 and 3).
  - d) Overall the amount of retail floorspace in the city centre has decreased since the last survey which continues an ongoing trend. It reduced by a further 2,304sqm which is around a 1% decrease. The number of units has also fallen by five units which is a decrease of around 0.5%(see table 1). This continued fall in retail suggests that the city centre is continuing to diversify which is unsurprising given that planning policies are now promoting more flexibility. Furthermore the recent changes to the Use Classes Order now makes it much easier and quicker for landlords to offer their premises to a wider range of commercial businesses, which is important as the city recovers from the pandemic.
  - e) Total vacant floorspace (including refurbishments) in the primary retail area has increased slightly from 14.9% in July 2021 to 15.1% in March 2022. The percentage of vacant retail units however has reduced from 15.2% to 14.6% (see table 4).
  - f) Most of the primary area retail frontage zones are still performing reasonably well in terms of their retail function with all of them being within their recommended minimum percentage rate of A1 retail. Four of the seven monitored frontages have actually seen an increase in the proportion of shops in the retail frontage since 2021 which are PC02: Castle Mall (now known as Castle Quarter), PC03: Chapelfield (now known as Chantry Place), PR01: Back of the Inns/Castle Street and PR03: St Stephens Street/Westlegate. There has however been a reduction in retail in three frontage areas which

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<sup>2</sup> [Local Data Company Vacancy Monitor, Q1 2022](#)

are PC01: Gentleman's Walk/Haymarket/Brigg Street, PR02: The Lanes east and PR06: Timberhill/Red Lion Street (see table 5).

- g) Long term vacancies have been a concern for the Castle Quarter for several years and whilst the diversification into the leisure sector has prevented a number of units sitting empty and has helped increase footfall, there remain high vacancy rates within this shopping centre. In March 2022 17% of retail floorspace is vacant and 33% of units are vacant. When considering all town centre uses the percentage of vacant floorspace increases to 21% and the number of vacant units to 40%. On a positive note, compared to July 2021 there has been a reduction in vacancies both in terms of retail floorspace and retail units; however when taking into account all town centre uses there has been an increase in vacancy rates. This increase however can largely be attributed to the closure of the vaccination clinic which was temporarily using the former food court. The former food court is soon to be refurbished as a new street food and live music venue.
- h) Chantry Place (formerly Chapelfield) on the other hand remains very well occupied and at the time of the survey only eight units were vacant out of a total of 93 (8.6%) and in terms of floorspace only 3.4% was vacant.
- i) Retail vacancies have remained relatively stable in the secondary retail areas, fluctuating by only 0.1%. Vacant floorspace is however very high and at 23.2% is by far the highest in the city centre. However the high vacancy rate is a result of two units remaining closed in the Cathedral Retail Park with the retail park itself having a vacant floorspace figure of 72%. If the Cathedral Retail Park is removed from the figures then the vacancy rate for the secondary retail area would be only 7.4%.
- j) Vacancy rates '*as a proportion of all retail units*' are lower in the secondary area than any other area within the city. In March 2022 only 8.9% of units were vacant, which compares to 9.8% in July 2021. This indicates that the smaller shops in the Lanes are generally performing very well and have been very resilient during the pandemic (See table 6).
- k) In terms of retail frontages within the secondary area, there has been no change in two of the three zones. SR03: St Benedicts is already below the minimum threshold as set out in the Main Town Centre Uses and Retail Frontages Supplementary Planning Document (December 2014) and has seen a slight reduction in its proportion of retail from 59.4% to 58.1% (see table 7).
- l) In the Large District Centres, vacancy rates have increased from 9.1% to 9.4% and vacant units have increased from 10.9% to 12.7%; however they are still regarded as low for a shopping area which does not form a central part of the city's retail offer (See table 8). Within the Riverside Large District Centre 14.5% of retail floorspace is vacant and 17.6% of units. The Magdalen Street, Anglia Square and St Augustine's LDC on the other hand has very low vacancy rates of 4.5% for floorspace and 12% for units which is very competitive especially in terms of retail floorspace vacancy rates.
- m) In the rest of the city centre (streets outside the defined areas), vacancy rates have decreased from 19.2% in 2021 to 17.8% in 2022 and in terms of retail

units it has reduced from 19.4% to 18.5%. In terms of units vacancy rates are now as they were back in June 2018 (See table 9).

6. The July 2021 retail monitor reported significant increases in vacancy rates which was unsurprising given the pandemic. As has been the case nationally, over the past couple of years, many national chains have struggled within the impacts of COVID and national lockdowns and many have unfortunately closed permanently. The picture back in July 2021 was however not as bad as it could have been and in particular Norwich's strong independent sector, showed just how robust and competitive it was.
7. In terms of shop units the March 2022 survey does show an overall improvement in shop vacancy rates and other than within the Large District Centre, the city is moving in a positive direction. In terms of all vacant floorspace, parts of the city centre are seeing a reduction in vacancies whilst other areas continue to see an increase. This further supports the findings from the July 2021 monitor that it is the smaller retailers (of which many are independent) that are performing better whereas many of the larger units remain vacant.
8. The city centre does remain busy and vibrant and as people's confidence has returned, footfall within the city has increased. The Centre for Cities<sup>3</sup> have a tracker that shows how quickly high streets in the UK's largest cities and town are returning to their previous levels of activities. The most recent survey results show the average footfall for the final week of March 2022, compared to pre-lockdown levels. For Norwich the overall recovery index (which is everyone who was in the city centre at any time of the day, compared to a pre-lockdown baseline of 100) is 115 and the spend index is 102. This shows that footfall and spend are higher than pre pandemic. Centre for Cities also produce a weekday, weekend and night-time index and the findings from these are as follows (the pre-lockdown baseline is 100). The weekday index is 112, the weekend index is 142 and the night-time (Friday and Saturdays only) index is 76. This is a very positive sign for Norwich and has resulted in the Centre for Cities classifying Norwich's economy as strong.
9. The next year will continue to be a challenge for our high street as retailers and other town centre businesses continue to recover from the pandemic. However as we emerge from the pandemic, there are other factors that could impact upon the high street this year. In particular with inflation at a near 30 year high, retailers will be faced with rising costs whilst consumers will see their real income and disposable income reduced. It will therefore be important to carry out another survey in around six to nine months' time to see how the city centre and our local and district centres are performing.

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<sup>3</sup> [High streets recovery tracker | Centre for Cities](#)

**Table 1: Norwich city centre – provision of A1 retail floorspace<sup>4</sup>**

<b>Retail floorspace (use class A1)</b>				
	<b>All</b>	<b>Trading</b>	<b>Vacant</b>	<b>Under construction/ refurbishment</b>
<b>March 2022</b>	<b>213,701</b>	<b>181,137</b>	<b>32,050</b>	<b>514</b>
July 2021	216,005	183,211	31,409	1,385
October 2020	215,949	193,658	21,686*	605
October 2019	217,539	195,891	11,992	9,656
June 2018	223,770	198,519	16,265	8,986
June 2016	223,987	208,342	13,006	2,639
Sept 2015	223,762	210,509	11,028	2,225
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
<b>Retail units (use class A1)</b>				
	<b>All</b>	<b>Trading</b>	<b>Vacant</b>	<b>Under construction/ refurbishment</b>
<b>March 2022</b>	<b>966</b>	<b>833</b>	<b>128</b>	<b>5</b>
July 2021	971	834	130	7
October 2020	976	833	140**	3
October 2019	971	873	88	10
June 2018	992	885	98	9
June 2016	1023	906	110	7
Sept 2015	1020	908	103	10
April 2014	1048	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
<b>Retail vacancy rate (use class A1)</b>				
	<b>As a proportion of all retail floorspace</b>	<b>As a proportion of retail floorspace excluding space being built or refitted</b>	<b>As a proportion of all retail units</b>	
	<i><u>Vacant+Refurbishment</u></i> <i>All</i>	<i><u>Vacant</u></i> <i>All</i>	<i><u>Vacant+Refurbishment</u></i> <i>All</i>	
<b>March 2022</b>	<b>15.2%</b>	<b>15.0%</b>	<b>13.8%</b>	

<sup>4</sup> The following tables still refer to Use Class A1 (shops). Changes to the Use Class Order came into force on 1<sup>st</sup> September 2020. This therefore now monitors Use Class E(a) (commercial, business and service for the display or retail sale of good, other than hot food, principally to visiting members of the public). The tables will be updated to reflect this when the next full monitor is produced.

July 2021	15.2%	14.5%	14.1%
October 2020	10.3%	10.0%	14.7%
October 2019	10.0%	5.5%	10.1%
June 2018	11.3%	7.3%	10.8%
June 2016	7.0%	5.8%	11.4%
Sept 2015	5.9%	4.9%	11.1%
April 2014	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%
<b>Overall retail floorspace change</b>			
Since July 2021	<b>Decreased by 2,304 sqm (1.0% decrease)</b>		
Since July 2008	<b>Decreased by 15,419 sqm (6.7% decrease)</b>		

**Table 2: Summary of all town centre uses vacancy rates**

	As a proportion of all floorspace <i><u>Vacant+Refurbishment</u></i> <i>All</i>	As a proportion of all units <i><u>Vacant+Refurbishment</u></i> <i>All</i>
Norwich City Centre	15.8%	14.3%
Primary retail area	15.6%	16.3%
Secondary Retail area	20.3%	10.0%
Large District Centre	9.6%	12.6%
Rest of Centre	17.8%	15.0%

**Table 3: Summary of retail only vacancy rates**

	As a proportion of all retail floorspace <i><u>Vacant+Refurbishment</u></i> <i>All</i>	As a proportion of all retail units <i><u>Vacant+Refurbishment</u></i> <i>All</i>
Norwich City Centre	15.2%	13.8%
Primary retail area	15.1%	14.6%
Secondary Retail area	23.2%	8.9%
Large District Centre	9.4%	12.7%
Rest of Centre	17.8%	18.5%

**Table 4: Primary shopping area**

Retail floorspace (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>147,573</b>	<b>125,219</b>	<b>22,136</b>	<b>218</b>
July 2021	148,263	126,098	21,564	601
October 2020	148,498	135,424	12,469*	605
October 2019	150,094	134,405	6,148	9,541
June 2018	155,555	139,261	8,265	8,029
June 2016	155,389	143,867	8,883	2,639
Sept 2015	155,139	145,445	7,711	2,017
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
Retail units (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>521</b>	<b>445</b>	<b>73</b>	<b>3</b>
July 2021	521	442	76	3
October 2020	524	442	79**	3
October 2019	523	465	50	8
June 2018	530	479	48	3
June 2016	562	484	72	7
Sept 2015	559	481	72	7
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
Retail vacancy rate (use class A1)				
	As a proportion of all retail floorspace  <i><u>Vacant+Refurbishment</u></i> <i>All</i>	As a proportion of retail floorspace excluding space being built or refitted  <i><u>Vacant</u></i> <i>All</i>	As a proportion of all retail units  <i><u>Vacant+Refurbishment</u></i> <i>All</i>	
<b>March 2022</b>	<b>15.1%</b>	<b>15.0%</b>	<b>14.6%</b>	
July 2021	14.9%	14.5%	15.2%	
October 2020	8.8%	8.4%	15.6%	

October 2019	10.5%	4.1%	11.1%
June 2018	10.5%	5.3%	9.8%
June 2016	7.4%	5.7%	14.0%
Sept 2015	6.3%	5.0%	14.1%
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%

\* of which 642 sqm appears to be closed due to COVID (still set up for trading).

\*\* of which 6 appear to be closed due to COVID (still set up for trading).

**Table 5: Primary Area Retail Frontage Zones - Retail frontages in March 2022**

Frontage zone	Total frontage (m)	Total non-retail frontage Oct 2019	% A1 retail March 2022 (frontage)	% A1 retail July 2021 (frontage)	Minimum threshold (from 2014 SPD)
<b>Primary retail area core frontage zones</b>					
PC01: Gentleman's Walk/ Haymarket/Brigg Street	856.4	108.8	87.3%	88.1%	80%
PC02: Castle Mall (Levels 1 & 2)	898.1	145.1	83.8%	83.0%	80%
PC03: Chapelfield, upper & lower Merchants Hall and St Stephens Arcade	641.0	27.0	95.8%	95.7%	80%
<b>Frontage zones in the rest of the primary retail area</b>					
PR01: Back of the Inns/Castle Street area	663.8	197.7	70.2%	67.7%	65%
PR02: The Lanes east (Bedford Street/Bridewell Alley)	1116.3	318.5	71.5%	71.8%	70%
PR03: St Stephens Street/Westlegate	821.5	114.9	86.0%	83.6%	80%
PR04: Castle Meadow north		N/A <sup>5</sup>			
PR05: Chapelfield Plain		N/A <sup>6</sup>			
PR06: Timberhill/Red Lion Street	434.2	151.35	65.1%	66.0%	60%

Key:

Green denotes no change or increase in A1 retail since 2019

Red denotes decrease in A1 retail since 2019.

Blue denotes frontage is within minimum A1 threshold.

Orange denotes minimum A1 frontage threshold has been breached.

<sup>5</sup> There is no defined frontage in this zone

<sup>6</sup> There is no defined frontage in this zone



**Table 6: Secondary Shopping**

Retail floorspace (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>21,826</b>	<b>16,752</b>	<b>5,074</b>	<b>0</b>
July 2021	21,859	16,775	5,060	24
October 2020	21,933	17,180	4,753*	0
October 2019	21,611	17,651	3,960	0
June 2018	21,772	17,921	3,741	110
June 2016	21,858	21,243	615	0
Sept 2015	21,793	21,148	594	51
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
Retail units (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>179</b>	<b>163</b>	<b>16</b>	<b>0</b>
July 2021	183	165	17	1
October 2020	185	169	16**	0
October 2019	181	167	14	0
June 2018	182	168	12	2
June 2016	185	172	13	0
Sept 2015	184	173	10	1
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
Retail vacancy rate (use class A1)				
	As a proportion of all retail floorspace  <i><math>\frac{\text{Vacant} + \text{Refurbishment}}{\text{All}}</math></i>	As a proportion of retail floorspace excluding space being built or refitted  <i><math>\frac{\text{Vacant}}{\text{All}}</math></i>	As a proportion of all retail units  <i><math>\frac{\text{Vacant} + \text{Refurbishment}}{\text{All}}</math></i>	
<b>March 2022</b>	<b>23.2%</b>	<b>23.2%</b>	<b>8.9%</b>	

July 2021	23.3%	23.1%	9.8%
October 2020	21.7%	21.7%	8.6%
October 2019	18.3%	18.3%	7.7%
June 2018	17.7%	17.2%	7.7%
June 2016	2.8%	2.8%	7.0%
Sept 2015	3.0%	2.7%	6.0%
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%

\* of which 186 sqm appears to be closed due to COVID (still set up for trading).

\*\* of which 2 appear to be closed due to COVID (still set up for trading).

**Table 7: Secondary area retail frontage zones**

Frontage zone	Total frontage (m)	Total non-retail frontage March 2022	% A1 retail March 2022 (frontage )	% A1 retail July 2021 (frontage )	Minimum threshold (from 2014 SPD)
<b>Primary retail area core frontage zones</b>					
SR01	404.1	96.5	<b>76.1%</b>	76.1%	70%
SR02	121.7	39.4	<b>67.6%</b>	67.6%	60%
SR03	638.0	267.6	<b>58.1%</b>	59.4%	60%
SR04	No defined frontage				
SR05	No defined frontage				
SR06	No defined frontage				

**Table 8: Large District Centres (Magdalen Street, St Augustine's Street, Anglia Square & Albion Way Riverside)**

Retail floorspace (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March</b>	<b>32,695</b>	<b>29,623</b>	<b>3,051</b>	<b>21</b>
July 2021	32,379	29,426	2,932	21
October 2020	32,015	29,974	2,041*	0
October 2019	32,164	31,043	1,071	50
June 2018	32,609	30,421	1,748	440
June 2016	32,353	30,534	1,750	69
Sept 2015	32,353	31,237	1,047	69
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
Retail units (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>142</b>	<b>124</b>	<b>17</b>	<b>1</b>
July 2021	138	123	14	1
October 2020	138	120	18**	0
October 2019	137	123	13	1
June 2018	140	124	14	2
June 2016	139	125	13	1
Sept 2015	139	129	9	1
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
Retail vacancy rate (use class A1)				
	As a proportion of all retail floorspace  <i><math>\frac{Vacant+Refurbishment}{All}</math></i>	As a proportion of retail floorspace excluding space being built or refitted  <i><math>\frac{Vacant}{All}</math></i>	As a proportion of all retail units  <i><math>\frac{Vacant+Refurbishment}{All}</math></i>	
<b>March 2022</b>	<b>9.4%</b>	<b>9.3%</b>	<b>12.7%</b>	

July 2021	9.1%	9.1%	10.9%
October 2020	6.4%	6.4%	13.0%
October 2019	3.5%	3.3%	10.2%
June 2018	6.7%	5.4%	11.4%
June 2016	5.6%	5.4%	10.0%
Sept 2015	3.4%	3.2%	7.2%
April 2014	3.2%	2.4%	7.1%
August 2013	4.1%	1.0%	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%	16.0%

\* of which 25 sqm appears to be closed due to COVID (still set up for trading).

\*\* of which 2 appear to be closed due to COVID (still set up for trading).

**Table 9: Rest of city centre**

Retail floorspace (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>11,607</b>	<b>9,544</b>	<b>1,788</b>	<b>275</b>
July 2021	13,503	10,912	1,852	739
October 2020	13,503	11,080	2,423	0
October 2019	13,670	12,792	813	65
June 2018	13,834	11,769	1,658	407
June 2016	14,387	12,629	1,758	0
Sept 2015	14,475	12,711	1,676	88
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
Retail units (use class A1)				
	All	Trading	Vacant	Under construction/ refurbishment
<b>March 2022</b>	<b>124</b>	<b>101</b>	<b>22</b>	<b>1</b>
July 2021	129	104	23	2
October 2020	129	104	25	0
October 2019	130	118	11	1
June 2018	135	110	23	2
June 2016	137	125	12	0
Sept 2015	138	125	12	1
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
<b>Retail vacancy rate (use class A1)</b>				
	As a proportion of all retail floorspace <i><u>Vacant+Refurbishment</u></i> <i>All</i>	As a proportion of retail floorspace excluding space being built or refitted <i><u>Vacant</u></i> <i>All</i>	As a proportion of all retail units <i><u>Vacant+Refurbishment</u></i> <i>All</i>	
<b>March 2022</b>	<b>17.8%</b>	<b>15.4%</b>	<b>18.5%</b>	
July 2021	19.2%	13.7%	19.4%	
October 2020	17.9%	17.9%	19.4%	
October 2019	6.4%	5.9%	9.2%	
June 2018	15%	12%	18.5%	
June 2016	12.2%	12.2%	8.8%	
Sept 2015	12.2%	11.6%	9.4%	
April 2014	19.3%	18.3%	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%	

\* of which 145 sqm appears to be closed due to COVID (still set up for trading).

\*\* of which 3 appear to be closed due to COVID (still set up for trading).

**Table 10: 'At a Glance' The direction of travel of vacancy rates and retail floorspace in Norwich between July 2021 and March 2022**

Area	Available vacant floor space	All vacant floor space including refurbishment	Number of vacant Units	Overall Floor Area	Overall units
City Centre	↑		↓	↓	↓
Primary Area	↑	↑	↓	↓	
Secondary Area	↑	↓	↓	↓	↓
Large District Centres	↑	↑	↑	↑	↑
Rest of city centre	↑	↓	↓	↓	↓

Key

↑ = increase

↓ = decrease

Red = Moving in a negative direction

Green = Moving in a positive direction

Grey = No change