Nathaniel Lichfield & Partners
Planning. Design. Economics.

Breckland Retail Study

Retail Study Update 2014

Breckland Council

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Contents

1.0 Introduction

Background

1.1 Breckland Council commissioned a Retail and Commercial Leisure in 2010, prepared by Nathaniel Lichfield & Partners (NLP). NLP has been commissioned by the Council to prepare a comprehensive update of the 2010 study. The purpose of this update study is to:

1. update evidence in light of changes in national policy, in particular the requirements of the NPPF and recent changes to permitted development rights and retail and leisure trends;
2. refresh the evidence base to aid the implementation of the Local Plan up to its end date of 2031 / 36 through provision of a new household survey, expenditure forecasts and floorspace projections;
3. review the existing retail hierarchy advising if it is still appropriate;
4. identify and advice on addressing any deficiencies in provision and potential new planning policy;
5. advise on the scope of growth and the most appropriate locations for future development and the balance between centres, along with future policy options to address the identified needs;
6. assess the potential for leisure and other town centre uses in the district; and
7. provide guidance for considering planning applications and proposals for retail and all main town centre uses over the plan period.

1.2 The study seeks to provide a robust and sound baseline evidence to inform the preparation of the Council's emerging single Local Plan DPD. It will inform choices about the nature and extent of retail growth to be accommodated throughout the district in the future, in particular, it is expected to play a key role in guiding the spatial vision and strategic objectives set in the Local Plan in the context of predicted population growth over the plan period.

Report Structure

1.3 Section 2 of this report summarises describes the shopping hierarchy. Section 3 outlines recent trends and Section 4 provides an updated retail capacity and need assessment. Section 5 assesses the need for commercial leisure and other town centre uses. Section 6 explores opportunities for accommodating growth and Section 7 provides the recommendations and conclusions.

1.4 A glossary of terms is set out in Appendix 1.

2.0 The Hierarchy of Centres

Introduction

2.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. Local Plans are expected to define a network and hierarchy of centres that is resilient to anticipated future economic changes.

2.2 The recently published Planning Practice Guidance (PPG) places emphasis on developing strategies for town centres that are appropriate and realistic to the role of centres in the hierarchy. Town centre strategies should be based on the current state of a centre and opportunities to meet development needs (in full). These town centre strategies should seek to support the town centre vitality and viability, and should assess if changes to the role and hierarchy of centres are appropriate.

2.3 This section provides an overview of the shopping hierarchy in Breckland and the surrounding sub-region.

Centres in Breckland and the Surrounding Area

2.4 Thetford and Dereham are the main shopping centres within Breckland, followed by Attleborough, Swaffham and Watton and the Local Service Centre Villages. Thetford and Dereham attract shoppers from across the district, while Attleborough, Swaffham and Watton perform a more local shopping function, with a more limited range of comparison goods retailers. The centres compete with major shopping destinations just outside the district, including Norwich, Kings Lynn and Bury St Edmunds, particularly for comparison retailing. Most notably, Norwich has a strong influence over the eastern part of the district.

2.5 A household telephone survey has been undertaken for this study (see Appendix 6) in order to establish the catchment areas of centres and shopping patterns in general.

2.6 Norwich, Cambridge, Peterborough and Ipswich town centres are at the top of the shopping hierarchy in the northern part of the East of England Region, competing with other large regional/ sub-regional centres.

2.7 Venuescore ranks the UK's top 2,500 plus retail destinations including town centres, malls, retail warehouse parks and factory outlet centres. Each destination is given a weighted score for the number of multiple retailers present, and the score attached to each retailer is weighted depending on their overall impact on shopping patterns.

2.8 Venuescore's score does not necessarily reflect the overall size of the centre or the number of shops, but the presence of national multiples and the relative draw and importance that stores have. Each centre is given a weighted score which takes account of its provision of multiple retailers and anchor store strengths. For example, anchor department stores such as John Lewis or

Debenhams receive a higher score than other multiple operators, in order to reflect their major influence on non-food shopping patterns. A location which has stronger retailers which attract more visitors to the centre and have a greater influence on shopping patterns will receive a higher score than those that do not.

2.9 Four of the five town centres within the district are listed within Venuescore's data. The results for these two destinations and other relevant centres are shown in Table 2.1. These centres are shown on the plan Figure 2.1 overleaf.

Table 2.1 Venuescore UK Shopping Index 2013

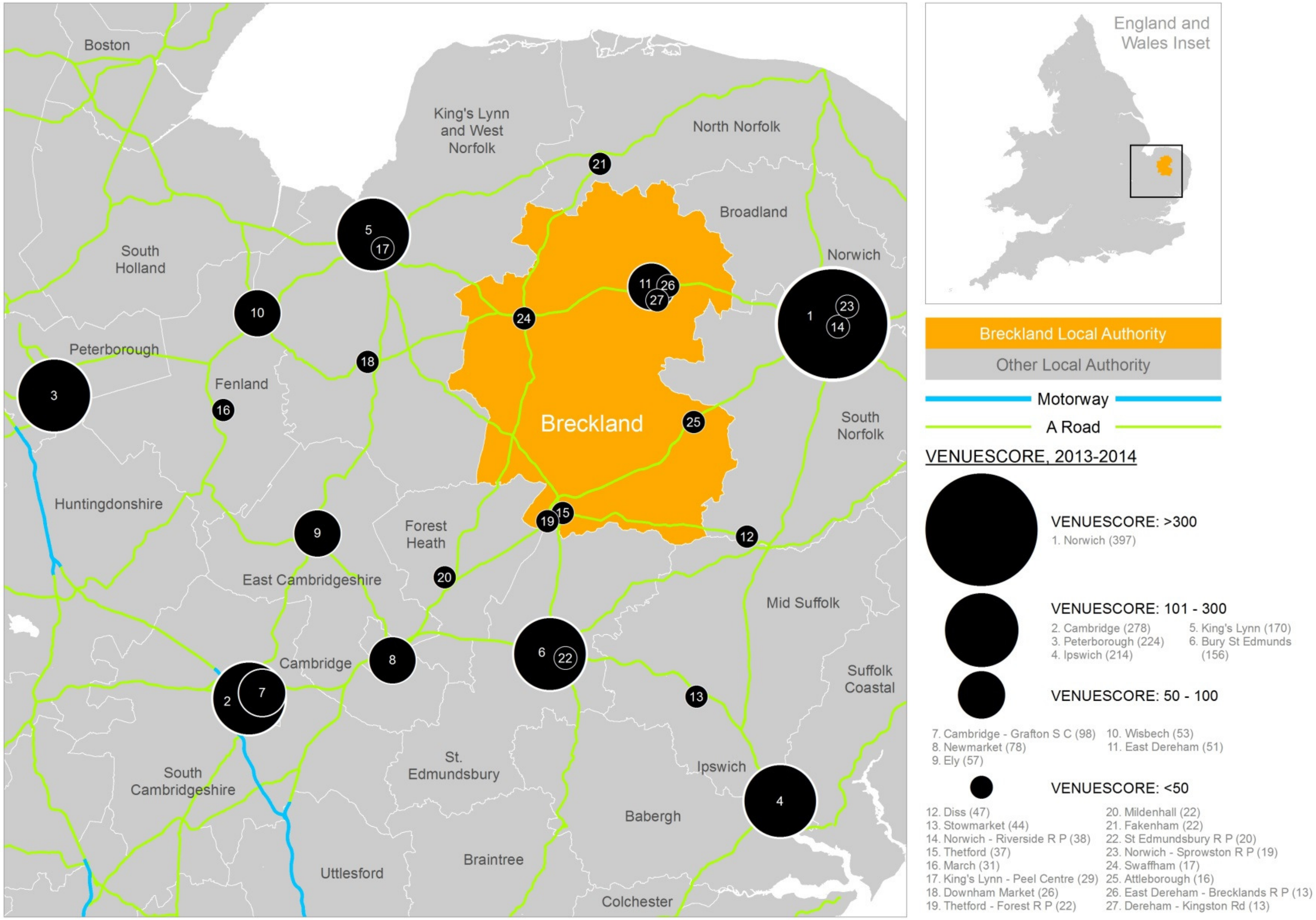
Centre	UK Rank	Venuescore
Norwich	13	397
Cambridge	34	278
Peterborough	54	224
Ipswich	58	214
Kings Lynn	106	170
Bury St Edmunds	128	156
Cambridge Grafton Centre	239	98
Newmarket	317	78
Ely	450	57
Wisbech	495	53
East Dereham	**522**	**51**
Diss	573	47
Stowmarket	612	44
Thetford	**714**	**37**
March	864	31
Downham Market	1024	26
Mildenhall	1204	22
Fakenham	1204	22
Swaffham	**1524**	**17**
Attleborough	**1604**	**16**

Source: Venuescore, Javelin Group 2013

2.10 Norwich, Cambridge, Peterborough and Ipswich are regional/sub-regional centres at the top of the shopping hierarchy. Kings Lynn and Bury St Edmunds are smaller centres at the next tier down. Dereham and Thetford are third tier centres, comparable with Ely, Diss, Stowmarket and Wisbech. Swaffham and Attleborough are fourth tier centres at the same level as Mildenhall and Fakenham.

2.11 Figure 2.1 indicates that residents in Breckland have good access to surrounding regional and sub-regional centres, as well as having a choice of smaller centres for day to day shopping needs. The outflow of retail expenditure from the district, particularly comparison goods, is significant and this is likely to remain high in the future.

Figure 2.1: Venuescore Shopping Hierarchy



Existing Retail Provision in Breckland

2.12 An assessment of the existing retail and service provision in the main centres is provided in the centre audits included at Appendix 5. A summary of existing retail provision in provided in Table 2.2 below.

Table 2.2 Existing Retail Shop Provision

Centre	Town Centre Class A1 Shop Units	Convenience Goods Floorspace (sq.m net)	Comparison Goods Floorspace (sq.m net)
Thetford	77	6,918	19,438
Dereham	136	8,662	22,718
Swaffham	68	6,028	3,567
Watton	57	2,290	3,038
Attleborough	63	2,735	3,431
Total	**401**	**26,633**	**52,192**

Source: Breckland Land Use Survey 2014

2.13 Dereham and Thetford contain the main concentrations of comparison goods floorspace within the district. The audit of centres in Appendix 5 also confirms that Dereham and Thetford are the two main shopping destinations within the district. Swaffham, Watton and Attleborough support the two main centres by providing shops and services to meet day to day needs of their towns and rural hinterland. There is only limited retail provision in the remaining service centres and villages within the district.

2.14 The district falls within the regional catchment area of Norwich. In addition, the catchment areas of Kings Lynn and Bury St Edmunds all extend into the district.

3.0 Recent Trends

The National Planning Policy Framework

3.1 The previous 2010 Retail Study was based on the guidance set out in PPS4: 'Planning for Sustainable Growth' published in December 2009. This guidance has now been superseded by the NPPF published by the Department for Communities and Local Government on 27 March 2012. It sets out the Government's planning policies for England and replaces all previously issued Planning Policy Statements (PPSs) and Planning Policy Guidance Notes (PPGs) with a single national planning policy document (including PPS4)

3.2 At the heart of the NPPF is a presumption in favour of sustainable development, which should be seen as a golden thread running through both plan-making and decision-taking. In terms of plan-making this means that (para. 14):

- local planning authorities should positively seek opportunities to meet development needs of their area;
- local Plans should meet objectively assessed needs, with sufficient flexibility to adapt to rapid change, unless:
  - any adverse impacts of doing so would significantly and demonstrably outweigh the benefits, when assessed against the policies in this Framework taken as a whole; or
  - specific policies in this Framework indicate development should be restricted.

3.3 All plans should be based upon and reflect the presumption in favour of sustainable development, with clear policies that will guide how the presumption should be applied locally (para. 15).

3.4 A set of 12 core land-use planning principles should underpin both plan-making and decision-taking (para. 17), including:

- proactively drive and support sustainable economic development to deliver the homes, business and industrial units, infrastructure and thriving local places that the country needs. Every effort should be made objectively to meet the needs of an area, and respond positively to wider opportunities for growth. Plans should take account of market signals, such as land prices and housing affordability, and set out a clear strategy for allocating sufficient land which is suitable for development in their area, taking account of the needs of residential and business communities;
- take account of the different roles and character of different areas, promoting the vitality of main urban areas;
- encourage the effective use of land by reusing land that has been previously developed (brownfield land), provided that it is not of high environmental value.

3.5 Local Planning Authorities should plan proactively to meet the development needs of business and support an economy fit for the 21st century (para. 20).

3.6 In terms of plan making, the NPPF (para. 161) states that Local Planning Authorities should use their evidence base to assess:

- the need for land or floorspace for economic development, including both quantitative and qualitative needs for all foreseeable types of economic activity over the plan period, including retail and leisure development.
- the role and function of town centres and the relationship between them, including any trends in the performance of centres.
- the capacity of existing centres to accommodate new development.

3.7 In terms of retail development, the NPPF states (para. 23) that planning policies should be positive, promote competitive town centre environments and set out policies for the management and growth of centres over the plan period. In drawing up Local Plans, local planning authorities should:

- recognise town centres as the heart of their communities and pursue policies to support their viability and vitality;
- define a network and hierarchy of centres that is resilient to anticipated future economic changes;
- define the extent of town centres and primary shopping areas, based on a clear definition of primary and secondary frontages in designated centres, and set policies that make clear which uses will be permitted in such locations;
- promote competitive town centres that provide customer choice and a diverse retail offer and which reflect the individuality of town centres;
- retain and enhance existing markets and, where appropriate, re-introduce or create new ones, ensuring that markets remain attractive and competitive;
- allocate a range of suitable sites to meet the scale and type of retail, leisure, commercial, office, tourism, cultural, community and residential development needed in town centres. It is important that needs for retail, leisure, office and other main town centre uses are met in full and are not compromised by limited site availability. Local planning authorities should therefore undertake an assessment of the need to expand town centres to ensure a sufficient supply of suitable sites;
- allocate appropriate edge of centre sites for main town centre uses that are well connected to the town centre where suitable and viable town centre sites are not available. If sufficient edge of centre sites cannot be identified, set policies for meeting the identified needs in other accessible locations that are well connected to the town centre;
- set policies for the consideration of proposals for main town centre uses which cannot be accommodated in or adjacent to town centres;
- recognise that residential development can play an important role in ensuring the vitality of centres and set out policies to encourage residential development on appropriate sites; and

- where town centres are in decline, local planning authorities should plan positively for their future to encourage economic activity.

3.8 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will be assessed against NPPF policies and the key sequential and impact tests.

3.9 In terms of the sequential test, the policy requirements are largely unchanged from PPS4. Applications for main town centre uses should be located in town centres, then in edge of centre locations and only if suitable sites are not available should out of centre sites be considered. When considering edge and out of centre proposals, preference should be given to accessible sites that are well connected to the town centre. Both applicants and local planning authorities should demonstrate flexibility on issues such as format and scale (para. 24).

3.10 The NPPF states that Local Planning Authorities should require an impact assessment for applications for retail, leisure and office development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq m (para. 26). This should include an assessment of:

- the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal; and
- the impact of the proposal on town centre vitality and viability, including local consumer choice and trade in the town centre and wider area, up to five years from the time the application is made. For major schemes where the full impact will not be realised in five years, the impact should be assessed up to ten years from the time the application is made.

3.11 Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact on one of more of the above factors, it should be refused (para. 27).

3.12 The National Planning Policy Guidance (NPPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

3.13 The NPPG also introduces the requirement to consider a range of plausible scenarios, including a ‘no development’ scenario, which should not assume that all centres are likely to benefit from expenditure growth.

3.14 Recent and proposed changes to the General Permitted Development Order (GPDO) may also have an impact on town centres. These measures allow for greater flexibility for changes of use e.g. Class A uses to C3 residential use and Class A1 to A2 use. These measures could change the composition of town centres across the country, in particular the amount of Class A1 space could reduce.

Overview

3.15 This section considers the changes in the retail sector nationally and the implications for Breckland.

3.16 The economic downturn had a significant impact on the retail sector. A number of national operators have failed (e.g. Blockbuster, Comet, HMV, JJB Sports, Jessops, Clinton Cards, Woolworths, MFI, Land of Leather, Borders, Game, Firetrap, Peacocks, La Senza, Past Times, Barratts and Habitat), leaving major voids within town centres and on retail parks. This trend has had some impact on Breckland, but most of the affected businesses did not have stores within the district.

3.17 Many town centre development schemes have been delayed and the demand for traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth. A number of unimplemented retail development proposals e.g. Wrights Walk Phase 2 and the Cowper Road/Georgeis Road site in Dereham and the extension to Thetford Retail Park may be an indication of this drop in operator demand.

3.18 Assessing future expenditure levels needs to take into account the economic downturn and the likely pace of recovery. This retail study establishes the appropriate level of expenditure growth to be adopted over the study period, taking a long term view and recognising the cyclical nature of expenditure growth. Trends in population growth, home shopping/internet sales and growth in turnover efficiency also need to be carefully considered and a balanced approach taken.

3.19 An overview of national trends within the retail sector is set out below.

Expenditure Growth

3.20 Historic national retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However the recovery from the economic downturn is expected to result in slower growth in the short term.

3.21 In the past, expenditure growth has fuelled growth in retail floorspace, including major out-of-centre development, particularly in the 1980s and 1990s. The speed of recovery from the economic downturn suggests that high past rates of growth are unlikely to be achieved in the short term, but the underlying trend over the medium and long terms is expected to lead to a need for further modern retail floorspace, even allowing for continued growth in home shopping. These national trends are anticipated to be mirrored in Breckland.

3.22 For convenience goods, Experian anticipates limited national growth up to 2015, but stronger growth thereafter (0.8% per annum). For comparison goods, higher levels of growth are expected in the future (2.9% per annum after 2015), still at a lower rate than previous pre-recession trends.

3.23 Low expenditure growth and deflationary pressures in the non-food sector have had an impact on the high street in the last few years. As a result of these trends, the national shop vacancy rate (based on Goad Plan data) has increased from around 10% in 2005 to over 12% in 2014.

New Forms of Retailing

3.24 New forms of retailing (multi-channel shopping) have continued to grow, as an alternative to more traditional shopping. Home/electronic shopping has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect shopping has become more popular. The future growth of multi-channel retailing including home computing, internet connections and interactive TV will continue to have an effect on retailing in the high street and from traditional stores. Trends within this sector will have implications for retailing within Breckland.

3.25 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. The household survey results suggest 1.9% of households in Breckland did their last main food and grocery shopping via the internet/ delivery. The comparable figure within the 2010 study was 0.7%, which suggests home food and grocery shopping has increased in line with national trends. The Breckland figure still represents a lower proportion than the internet's national share of retail expenditure (about 7% in 2012 – Experian, October 2013).

3.26 The household survey results suggest 5.2% of households in Breckland do most of their non-food shopping at home via the internet, TV or catalogue. The comparable figure within the 2010 study was 1.7%, which suggests home non-food shopping has also increased in line with national trends. Again the Breckland figure represents a lower proportion than the internet's national share of retail expenditure (about 14% in 2012 – Experian, October 2013).

3.27 More details on internet shopping habits in the district are set out in the results of the household survey, summarised in Appendix 6. The internet shopping figures for Breckland do not indicate higher levels of home shopping than the national average, however internet sales in Breckland should increase in the future and this assumption is reflected in the allowance made for a growth in the proportion of non-store spending, as set out in the retail capacity methodology in Appendix 1. Recent trends suggest continued strong growth in this sector. Experian's Retail Planning Note 11 (October 2013) states:

"The strong increase in online shopping in the past decade has lifted the share of special forms of trading (SFT) to a level where it now accounts for around a tenth of total retail sales...

The rising share of internet sales in total retail transactions dominates the picture of SFT. Internet sales' share of total retail sales stood at near 10% in mid-2013 against 4.7% in June 2008 and just 2.9% as recently as March 2007…

Non-store retailing continues to grow rapidly, outpacing traditional forms of spending. We retain our assumption that non-store retailing will increase at a faster pace than total retail sales well into the long term. There were 52.7 million internet users in the UK (representing 84.1% of the population) in mid-year 2012 according to Internet World Stats. So growth of the internet user base will be less of a driver than in the past decade. But growth momentum will be sustained as new technology such as browsing and purchasing through mobile phones and the development of interactive TV shopping boost internet retailing. We expect that the SFT market share will continue to increase over the forecast period, although the pace of e-commerce growth will moderate markedly after about 2020. Our forecast has the SFT share of total retail sales reaching 17.4% by 2020 (15.4% in Retail Planner Briefing Note 9 of September 2011), rising to 20% by the end of the 2020s (15.5% previously)."

3.28 Experian indicates that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. Experian provides adjusted deductions for SFT and projections. These projections are widely adopted for retail planning purposes. Experian suggests a deduction of 2.1% should be made for convenience goods expenditure at 2012 and this figure is projected to increase to 4% by 2019 and 5.9% by 2024. For comparsion goods expenditure a deduction of 10.5% in 2012 is recommended, increasing to 15.1% by 2019 and 15.9% by 2024.

3.29 Reflecting Experian's recommendations, this Study makes an allowance for future growth in e-tailing and SFT expenditure reductions . It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

3.30 The implications on the demand for retail space need to be carefully considered. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators and click and collect operations, therefore growth in on-line sales may not always mean there is a reduction in the need for retail floorspace.

3.31 Given the likelihood that multi-channel shopping is likely to grow at a faster pace than total retail expenditure, the retail study assessment has adopted relatively cautious growth projections for retail expenditure (as set out in the retail capacity methodology, Appendix 1), and allowance has been made for retailers to increase their turnover density, due to growth in home shopping and click and collect.

3.32 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller store formats capable of being accommodated within town centres (such as the Tesco Express/Metro, Sainsbury's Central/ Local store and Marks and Spencer's Simply Foods formats). The number of Tesco Express and Sainsbury's Local stores has increased significantly during the last decade, due to the operator's national expansion in this sector, and perhaps also due to the absence of available sites for larger food stores. To date this trend has had a limited impact in Breckland, with one Tesco Express in Thetford. The main food store operators have also increasingly sought representation in small towns in predominantly rural areas. There has been interest from Morrison's and Asda to open large stores in Thetford. Tesco has recently opened a new store in Swaffham.

3.33 The expansion of European discount food operators Aldi and Lidl has been rapid during the last decade. There are three discount food operators located within Breckland. Lidl is planning to open a new store in Thetford and has extended existing stores in Attleborough and Dereham.

3.34 Food store operators have also implemented a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have often increased the sale of non-food products within their food stores, including clothing and electrical goods. The recent recession halted this trend for extensions nationally. A previous planning permission to extend the Tesco store in Thetford has not been implemented.

3.35 Comparison retailers have also responded to market conditions. The bulky goods warehouse sector has rationalised, including a number of mergers and failures, and scaled down store sizes.

3.36 Other traditional high street retailers often seek large out-of-centre stores, for example Boots, Next, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon have also expanded out-of-centre.

3.37 The charity shop sector has grown steadily over the past 20 years and there is no sign this trend will halt. Charity shops are Class A1 uses and planning policy cannot control the prolifation of these uses through the Use Class Order. In many centres, charity shops have occupied vacated Class A shop premises during the recession. Charity shops can generally afford higher rents than small independent occupiers because of business rate discounts, therefore it does not follow that these charity shops will be replaced by traditional shops when the market recovers, particularly in secondary frontages. There is no policy mechanism to encourage the replacement of charity shops with other retail uses. The audit of town centres in Appendix 5 indicates that the proportion of charity shops within the district is relatively high when compared with the national average.

3.38 The discount comparison sector has also grown significantly in recent years e.g. pound shops. Based on our experience, this trend is not particularly evident in Breckland, but there are Poundland stores in Thetford and Dereham and a Poundstretcher in Thetford.

3.39 Within town centres, many high street multiple comparison retailers have changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation of activity into the larger regional and sub-regional centres, e.g. Norwich, Peterborough, Ipswich and Cambridge. Operator demand for space has decreased during the recession and, of those national multiples looking for space many prefer to locate in larger centres.

3.40 The demand for premises within the bulky goods sector, i.e. furniture, carpets, electrical and DIY goods, was particularly weak during the recession. This has led to voids on retail warehouse parks and proposals to extend the range of goods sold to non-bulky goods. A planning permission to extend Forest Retail Park in Thetford has not been implemented

3.41 The economic downturn had a significant impact on the retail sector. A key effect the economic downturn has had on high streets is the increase in vacant shop units. The average unit vacancy rate increased from below 9% before the recession began in 2008 to the current figure of around 12% (source: Experian Goad Plans).

3.42 Breckland appears to have withstood the effects of the recession reasonably well in terms of shop vacancies. The current vacancy rate is below the national average in all five main centres, but the number of vacant shop units in these centres increased slightly between 2010 and 2014.

3.43 The vacancy rate in Breckland's five main centres was 8.6% in 2010, below the national average at that time 11.4%. The vacancy rate in 2014 is 9.5% suggesting a small increase in shop vacancies between 2010 and 2014. The vacancy rate remains marginally below the current national 12.1%.

3.44 The town centre audits in Appendix 5 indicate that the number of comparison shops has fallen since 2010 and the number of non-retail services (particularly Class A1 non retail services and Class A2 financial/professional services) has increased. The growth in these non-retail services has prevented a significant increase in shop vacancy levels across the district.

3.45 The continuation of these trends will influence future operator requirements in Breckland's centres with smaller vacant units becoming less attractive for new multiple occupiers, and retailers increasingly looking to relocate into larger units in higher order centres. However smaller vacant units should still be attractive to independent traders and non-retail services. Independent retailers make up the majority of occupiers in Attleborough, Swaffham and Watton.

High Street Retail Trends

3.46 The number of shop units within town centres has declined consistently since the early 1970s. The Centre for Retail Research's "Retail In 2018" (CRR) figures show a decline from over 300,000 units in 2001 to 282,000 in 2012. The CRR "Retail In 2018" report predicts nearly 62,000 high street stores across Great Britain (22% in total) will close between 2012 and 2018.

3.47 Online/multi-channel shopping and increasing retail operating costs are cited as the main culprits. Similar predictions of the High Street's decline were made during previous recessions in the early 1980s and 1990s, which subsequently proved to be exaggerated. On this basis, it is important to examine these predictions within the context of longer terms structural trends.

3.48 These trends hide underlying structural changes in the retail sector. These changes are not new and have been affecting the High Street for many years. In response to these trends, town centres have changed and diversified. The food and drink, leisure and non-retail service sectors have been successful in occupying space no longer suitable for shopping. There have been cyclical trends in vacancy rates reflecting the macro economic trends, but in most cases town centres recovered during periods of stronger growth. The High Street is more resilient than many commentators give it credit.

3.49 There is an underlying trend towards fewer but larger retail stores. Valuation Office data indicates the amount of retail floorspace in England and Wales has grown by over 3% during the economic downturn (2008 to 2012), despite a period of poor expenditure growth and an increase in on-line shopping.

3.50 Shopping behaviour will continue to change and the High Street will need to continue to respond. All town centres will need to focus on the advantages they have over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail and leisure experience. There will always be demand for a day out and customers cannot eat or drink on-line.

3.51 Experian data indicates that retail expenditure reduced by 1.3% during 2009 to 2012, with the food/grocery and bulky comparison goods sectors hardest hit. These expenditure trends explain why the High Street has performed better than out-of-centre retail parks. During this period the proportion of expenditure attributed to non-store trading (including home shopping) increased from 7.1% to 11.5%. These figure help to explain why High Streets and retail parks have struggled.

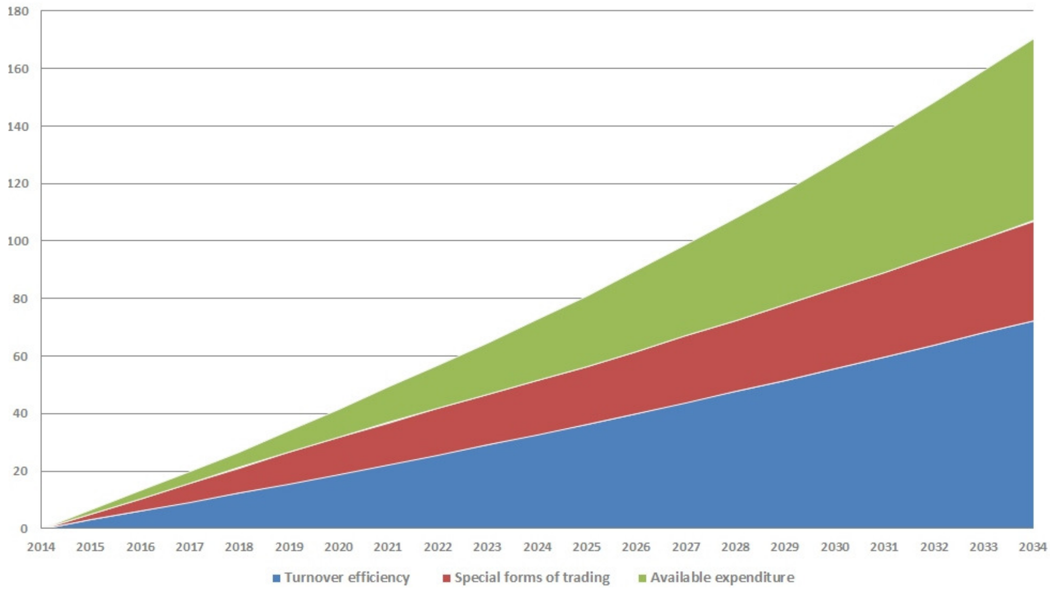
3.52 Experian's most recent forecasts suggest comparison goods expenditure per person will increase on average by 2.9% per annum, in real terms over and above inflation. If this forecast growth rate is achieved then comparison goods expenditure per person will increase by a third over the next 10 years and by 77% over 20 years. Taking into account ONS population projections, comparison goods expenditure in England will double over the next 20 years.

3.53 Not all projected expenditure growth will be available to support new retail floorspace. Non-store expenditure (special forms of trading) is expected to grow at a faster rate than expenditure and in proportional terms will absorb more growth. Continuing trends towards more modern and higher density stores, and the replacement of inefficient space will result in growth in turnover efficiency – Experian suggests a growth rate of 2% per annum for comparison floorspace. Figure 3.2 below shows how much expenditure growth may be available for new development over the next 20 years.

3.54 Allowing for growth in multi-channel shopping and increased turnover efficiency, there could still be £33 billion of growth available for new retail development in England over the next 10 years and £72 million over the next 20 years.

3.55 The challenge for town centres generally, and centres in Breckland specifically, will be to capitalise on this growth by securing much needed investment. There will be continued scope for centres to diversify, for example the evening economy, leisure and entertainment and more focus on convenience and service, but comparison retail will still be the driver of growth in many centres.

Figure 3.2: Growth in Comparison Goods Expenditure in England 2014 to 2034 (£ billion)



3.56 The delivery of town centre redevelopment opportunities will be the priority. There will be a requirement to build more retail floorspace within Breckland town centre, not only to boost its retail offer and compete effectively with other centres, but also to secure investment in the centre.

4.0 Retail Need Assessment

Introduction

4.1 The National Planning Policy Framework (NPPF) indicates (paragraph 14) that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs.

4.2 The Planning Policy Guidance (PPG) indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses.

4.3 The PPG also introduces the requirement to consider a range of plausible scenarios, including a ‘no development’ scenario, which should not assume that all centres are likely to benefit from expenditure growth.

4.4 This section objectively assesses the quantitative and qualitative scope for new retail floorspace in Breckland in the period up to 2036. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken as part of the town centre audits in Appendix 5.

Methodology

Price Base

4.5 All monetary values expressed in this study are at 2012 prices, consistent with Experian’s base year expenditure figures for 2012 (Retail Planner Briefing Note 11, October 2013) which is the most up to date information available.

Study Area

4.6 The quantitative analysis covers the primary catchment areas of the main shopping destinations in Breckland District. The extent of the study area comprises the majority of district and parts of neighbouring authorities, based on the influence of existing centres outside the district boundary. The study area is sub-divided into six zones based on postcode sector boundaries as shown in Appendix 1.

4.7 Shopping catchment areas do not always relate to local authority administrative boundaries. Retail studies should assess the need for new facilities generated by the catchment area population of each shopping destination. The study area adopted for the retail assessment within this study seeks to cover the primary catchment areas of the five main shopping destinations (Attleborough, Dereham, Thetford, Swaffham and Watton) within Breckalnd District using postcode sector boundaries.

4.8 Household shopper survey results confirm Thetford's primary catchment area extents into the rural areas south and west of the Breckland District LA boundary, and to reflect this Zone 1 extends into St. Edmundsbury, Fotrest Heath and King's Lynn/West Norfolk. Attleborough is close to the Breckland boundary and the town's primary catchment area extends into South Norfolk.

Retail Expenditure

4.9 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2012 have been obtained.

4.10 Experian's EBS national expenditure information (Experian Retail Planner Briefing Note 11) has been used to forecast expenditure within the study area. Experian's forecasts are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

4.11 Experian's EBS growth forecast rates for 2012 to 2015 reflect the current economic circumstances and provide an appropriate growth rate for the short term (for convenience goods: -0.6% for 2012-2013, -0.3% for 2013 to 2014 and +0.1% for 2014 to 2015; for comparison goods: 3.2% for 2012-2013, 2.3% for 2013-2014 and 2.8% for 2014-2015).

4.12 In the longer term it is more difficult to forecast year on year changes in expenditure. Experian's longer term growth average forecasts have been adopted i.e. 0.8% per annum for convenience goods after 2015 and 2.9% per annum growth for comparison goods. These growth rates are relatively cautious when compared with past growth rates, but in our view represent realistic forecast for future growth. These growth figures relate to real growth and exclude inflation.

4.13 Special Forms of Trading (SFT) or non-store activity is included within Experian's Goods Based Expenditure (GBE) estimates. SFT includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship with the demand for retail floorspace. The growth in home computing, internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing. This Experian information suggests that non-store retail sales in 2012 is:

- 7% of convenience goods expenditure; and
- 14% of comparison goods expenditure.

4.14 Experian predicts that these figures will increase in the future. However, Experian recognises that not all of this SFT expenditure should be excluded from a retail capacity analysis, because some of it relates to internet sales through traditional retail businesses, rather than internet companies. The turnover attributable to e-tail through retail businesses is included in the company average turnovers, and therefore expenditure figures should not exclude this expenditure. Experian has provided adjusted deductions for SFT and projections. These projections have been used to exclude only e-tail expenditure attributed to non-retail businesses, which will not directly impact on the demand for retail floorspace. The adjusted figures suggest that SFT sales in 2012 are:

- 2.1% of convenience goods expenditure; and
- 10.5% of comparison goods expenditure.

4.15 The projections provided by Experian suggest that these percentages could increase to 4% and 15.1% by 2019 respectively, and estimated at 5.9% and 15.9% by 2024. These figures have been adopted in this assessment.

4.16 Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the internet. This study makes an allowance for future growth in e-tailing based on Experian projections. It will be necessary to monitor the amount of sales attributed to home shopping in the future in order to review future policies and development allocations.

4.17 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains a relatively low percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector, but Experian's projections suggest this growth will level off by 2020.

4.18 The implications on the demand for retail space are unclear. For example, some retailers operate on-line sales from their traditional retail premises e.g. food store operators. Therefore, growth in on-line sales may not always mean there is a reduction in the need for retail floorspace. Given the uncertainties relating to internet shopping and the likelihood that it will increase in proportional terms, this assessment has adopted relatively cautious growth projections for retail expenditure.

Market Shares/Penetration Rates

4.19 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the July 2014 household survey.

4.20 The total turnover of shops within the district is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict (UK Food and Grocery Retailers) and Mintel Retail Rankings information, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Land Use and Floorspace

4.21 Land use and retail floorspace data has been derived from Breckland Council's Land Use Survey 2014, Valuation Office (VOA) for large out-of-centre retail warehouses, ORC's Storepoint database for large food stores and NLP's site survey in 2014.

4.22 The town centre audits in Appendix 5 assess uses within Breckland Council's adopted town centre boundaries, with the exception of Lime Kiln Retail Park in Thetford town centre (for consistency with Goad Plan national data). The retail capacity analysis set out in Appendix 2, 3 and 4 takes into account both in-centre and out of centre retail facilities.

Benchmark Turnover Levels

4.23 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.

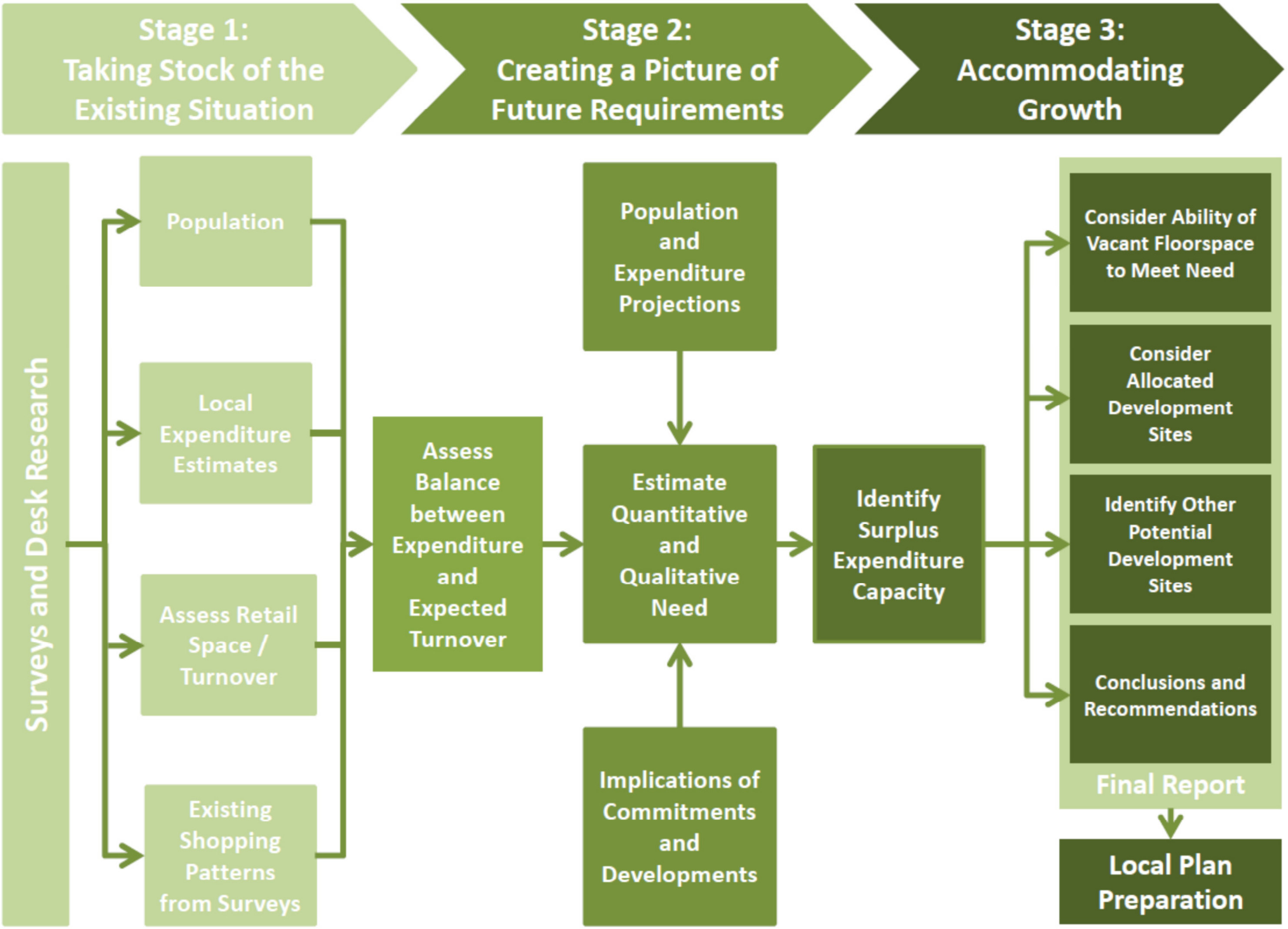
4.24 The estimated convenience goods sales areas have been derived from a combination of the Institute of Oxford Retail Consultants (ORC) StorePoint database, GOAD plans, Valuation Office data and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.

4.25 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each centre within the district and our experience of trading levels of small independent shops informed by household shopper surveys elsewhere, we have adopted an average sales density of £5,000 per sq.m net for convenience shops/stores in the study area. This is consistent with NLP's experience of retail studies across the South East and East regions. The total benchmark turnover of identified convenience sales floorspace within Breckland is £261.52 million (Table 12 - Appendix 2).

4.26 Mintel's Retail Rankings provides company average sales density information for a selection of national comparison retailers. This data suggests a notional average sales density for national high street comparison retailers of around £5,000 per sq.m net. For retail warehouse operators the average sales density is generally lower at around £2,500 per sq.m net.

4.27 The methodology is summarised in Figure 4.1 overleaf.

Figure: 4.1 Methodology for Estimating Future Requirements for Retail Floorspace



Study Area

4.28 The quantitative analysis is based on a defined study area that covers the catchment areas of the main shopping destinations in the district. The study area is sub-divided into six zones as shown in Appendix 1. The survey zones are based on postcode boundaries and take into consideration the extent of the primary catchment areas of Attleborough, Dereham, Thetford, Swaffham and Watton.

4.29 The primary catchment areas are the area where each centre will attract the vast majority of its retail trade. There will be retail expenditure leakage from the study area to centres outside, but conversely expenditure inflow from surrounding areas.

Population and Expenditure

4.30 The study area population for 2011 to 2036 is set out in Table 1 in Appendix 2. Population data has been obtained from Experian for each zone based on the 2011 Census. The 2011 base year population for each zone has been projected to 2036 based on the 2012 Sub-National Population Projections. The distribution of population between the study area zones is based on the expected distribution of new housing development, with major developments proposed in Thetford and Attleborough.

4.31 Table 2 in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2036. Forecasts of comparison goods spending per capita are shown in Table 2 in Appendix 3.

4.32 Based on the baseline population projection, as a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 31% from £324.18 million in 2014 to £425.44 million in 2036, as shown in Table 3 (Appendix 2).

4.33 Comparison goods spending is forecast to double between 2014 and 2036, increasing from £458.73 million in 2014 to £935.42 million in 2036, as shown in Table 3 (Appendix 3).

4.34 It should be noted that comparison goods spending is forecast to increase more than convenience spending as the amount spent on food and drink does not increase proportionately with disposable income, whereas spending on non-food goods is more closely linked to income.

4.35 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2014

4.36 Existing convenience goods retail sales floorspace within Breckland is 27,662 sq.m net, as set out in Table 12 in Appendix 2. This floorspace figure excludes comparison sales floorspace within food stores. About 40% of this food and grocery sales floorspace is located within the four largest food superstores in

Thetford and Dereham i.e. Tesco and Sainsbury's in Thetford and Tesco and Morrison's in Dereham. The amount of convenience goods sales floorspace has increased from 22,747 sq.m in 2010, primarily due to the new Tesco store in Swaffham, store extensions and the Lidl store under construction in Thetford.

4.37 Comparison goods retail floorspace within Breckland is estimated to be 52,192 sq.m net, as shown in Table 12 in Appendix 3, of which about 81% is located in Thetford and Dereham.

Existing Spending Patterns 2014

4.38 The results of the household shopper questionnaire survey undertaken by NEMS in July 2014 have been used to estimate existing shopping patterns within the study area zones. A summary of the methodology and results is shown in Appendix 6.

Convenience Shopping

4.39 The results of the household shopper survey relating to main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The estimates of market share or penetration within each study area zone are shown in Table 4, Appendix 2. A summary of the household shopper surveys is found in Appendix 6.

4.40 NLP's analysis of the household survey results (summarised in Appendix 6) suggests Breckland district retains a relatively high proportion of convenience goods expenditure within the study area as a whole, and therefore 23% leaks to other centres. It should be noted that the study area extends beyond the Breckland district boundary, and a high proportion of this expenditure 'leakage' relates to areas outside the district, i.e. particularly to the south and south east. Overall Breckland district has a high retention of convenience goods expenditure and there is only limited potential to increase this level of retention.

4.41 Table 4 (Appendix 2) indicates the proportion of convenience goods expenditure within each zone that is spent within Breckland ranges from 53.7% in Zone 6 (South East Breckland) to 97.2% in Zone 4 (Watton). The influence of stores outside the district is evident, particularly Morrison's and Tesco stores in Diss, which serve the south east of the Breckland study area.

4.42 Breckland's market share of total convenience expenditure in the study area as a whole is estimated to be over 77% (£249.78 million out of £324.18 million). The comparable figure suggested by the 2010 household survey was 76%, which suggest shopping patterns have not changed significantly since 2010 despite the increase in convenience goods floorspace. New food store developments recently competed, in particular Tesco at Swaffham, may not have achieved full and settled trading levels and as a result have yet to have a significant effect on shopping patterns.

4.43 The level of convenience goods expenditure attracted to shops/stores in Breckland in 2014 is estimated to be £269.40 million as shown in Table 5, Appendix 2. This includes estimates of inflow from beyond the study area, applying the market shares set out in Table 4. The turnover of convenience goods floorspace within the five main towns in the district is £262.11 million.

4.44 The total benchmark turnover of identified existing convenience sales floorspace within the five main centres in Breckland is £264.75 million (Table 12, Appendix 2).

4.45 These figures suggest that convenience goods retail sales floorspace in the district is collectively trading in line with the benchmark turnover in 2014, with a small deficit of available convenience expenditure of -£2.64 million, as shown in Table 13 in Appendix 2. An analysis of trading levels and quantitative aspects of need for the five main towns is set out below. A qualitative assessment of need is set out in this Section.

4.46 Table 13 indicates that convenience goods trading levels within the five main towns in the district vary significantly. Convenience floorspace in Thetford is estimated to be trading 16.7% (£12.52 million) above the benchmark turnover, taking into account the Lidl store under-construction). This surplus may explain operator interest from Asda and Morrison's to open new stores in Thetford.

4.47 In Swaffham there is a significant expenditure deficit (-£30.63 million), with food stores trading half the expected benchmark levels. This is due in part to the new Tesco store, which is unlikely to have achieved full and settled trading levels.

4.48 In Dereham, convenience floorspace is estimated to be trading 8% (£7.07 million) above the benchmark turnover. This expenditure surplus may reduce if Swaffham's market share of expenditure increases in the future i.e. when the new Tesco store's turnover builds up.

4.49 In Watton, convenience floorspace is estimated to be trading around the benchmark turnover. The extended Tesco store in Watton has absorbed expenditure capacity within the town.

4.50 In Attleborough, convenience floorspace is estimated to be trading over 36% (£8.38 million) above the benchmark turnover (taking into account the Lidl extension under-construction).

4.51 These figures suggest the priorities for new food store development are Thetford and Attleborough. There are food store proposals with planning permission within Thetford and Attleborough that if implemented will address these two priorities. These commitments are taken into account within the retail capacity projections set out in this Section.

Comparison Shopping

4.52 Table 4 (Appendix 3) indicates the proportion of comparison goods expenditure within each zone that is spent within Breckland ranges from 20.6% in Zone 6 (South East Breckland) to 57.5% in Zone 4 (Watton).

4.53 NLP's analysis of the household survey results suggests Breckland district retains a much lower proportion (less than 43%) of comparison goods expenditure within the study area as a whole, and therefore 57% leaks to other centres. It should be noted that the study area extends beyond the Breckland district boundary, and an element h proportion of this expenditure 'leakage' relates to areas outside the district. Breckland retains around half the comparison goods expenditure within the district.

4.54 Breckland falls within the catchment area of larger sub-regional centres e.g. Norwich and Bury St Edmunds. Based on NLP's experience across the county, predominantly rural districts within the catchment area of larger sub-regional centres tend to retain less than 50% of the total comparison goods expenditure generated by their residents.

4.55 The retention of comparison goods expenditure is generally lower than for convenience goods. This reflects the propensity of customers to do food and grocery shopping locally, whilst for comparison shopping, customers are more likely to shop around and/or travel longer distances to visit larger centres that have more choice. The ability to increase comparison goods market share will be constrained by larger centres in the sub-region.

4.56 Breckland's market share of total comparison expenditure in the study area as a whole is estimated to be less than 43% (£196.11 million out of £458.73 million). The comparable figure suggested by the 2010 household survey was just over 44%. Breckland's market share has not changed significantly since 2010, but the small reduction may be due to the decrease in the number of comparison shops in some centres. It should be noted that these market shares exclude internet/home shopping, which has grown in proportional terms since 2010.

4.57 The estimated comparison goods expenditure currently attracted by shopping facilities within Breckland is £205.9 million in 2014, as shown in Table 5, Appendix 3. This includes estimates of inflow from beyond the study area. The turnover of comparison goods floorspace within the five main towns in the district is £204.23 million.

4.58 Based on this expenditure estimate, the average sales density for existing comparison goods sales floorspace in the five main towns in the district (52,192 sq.m net) is £3,913 per sq.m net. The analysis of existing comparison shopping patterns in 2014 suggests the following average sales density figures for the five towns in Breckland shown in Table 4.1 below.

4.59 Based on NLP's experience across the country average sales densities for comparison floorspace can range from £2,000 to £7,000 per sq.m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers.

Table 4.1: Comparison Goods Average Sales Densities

Town	Average Sales Density 2014 (£ per sq.m net)
Thetford	£3,960
Dereham	£3,831
Swaffham	£3,023
Watton	£5,014
Attleborough	£4,142
Breckland Average	**£3,913**

4.60 Table 4.1 indicates that trading levels amongst comparison facilities in Breckland vary throughout the district. The average sales density figures should be viewed in the context of the type of floorspace in each town.

4.61 Comparison facilities in Watton and Attleborough are trading at a higher sales density, compared with Thetford, Dereham and Swaffham. Retail warehouses generally trade at a lower density than high street shops, which helps to explain why the averages are lower in Thetford and Dereham. Watton and Attleborough sales densities are relatively high because these town centres have predominantly small high street shop units with limited sales areas trading at a higher density.

4.62 There is no evidence to suggest existing comparison sales floorspace is over-trading anywhere in the district, or that there is surplus comparison expenditure available to support new development at present. On balance, existing floorspace in the district to be trading, at best satisfactorily in difficult, but improving market conditions.

Capacity for Convenience Goods Floorspace

4.63 As a minimum it is appropriate and realistic to plan to maintain the district's market share of convenience goods expenditure in the future. Planning for a decline in market share would not be sustainable and would not address the needs of local residents. It should be noted that as the forecast increase in internet spending is taken into account in projecting available expenditure in the future, this will have the effect of reducing the actual requirement for additional floorspace.

4.64 Food store commitments (listed at the foot of Table 13 in Appendix 2) and the build-up of the new Tesco store in Swaffham will change food and grocery shopping patterns in the future, and are likely to increase Breckland's market share of expenditure within the study area.

4.65 Based on adjusted market shares (Table 7 – Appendix 2) and population projections, the future level of available convenience goods expenditure at 2016, 2021, 2026, 2031 and 2036 is shown at Tables 8 to 11 in Appendix 2.

4.66 The total level of convenience goods expenditure available for shops in the district between 2014 and 2036 is summarised in Table 13 (Appendix 2). Convenience expenditure available to shopping facilities in the district is expected to increase from £269.40 million in 2014 to £368.41 million in 2036. This assumes commitments as identified within Attleborough and Thetford will come forward, as set out in the footnote to Table 13 (Appendix 2) and the adjusted market shares set out in Table 6 (Appendix 2).

4.67 Table 13 subtracts the benchmark turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for further development (the turnover efficiency for the convenience benchmark figures remain constant over this period). Within the district food store commitments, there is an expenditure deficit of -£40.64 million convenience goods expenditure in 2016. This deficit will reduce to -£23.13 million in 2021 and -£2.18 million in 2026. Continued future growth produces a surplus of +£18.64 million in 2031, increasing to £41.57 million in 2036. However projections vary significantly from town to town.

4.68 Food store commitments in Thetford (if implemented) will absorb expenditure capacity up to and beyond 2021, as will commitments in Attleborough. However continued expenditure growth will generate surplus expenditure in both towns at 2026 and beyond. These commitments are identified in Table 13 (Appendix 2).

4.69 The expenditure surplus in Dereham should fall slightly in the short term, if the new Tesco store in Swaffham increases the town's market share, but continued growth will generate a surplus of £20.78 million by 2036. The expenditure deficit in Swaffham will not be offset by this uplift in Tesco's market share and expenditure growth up to 2036. There will be a small expenditure surplus in Watton in the long term (2026 and beyond).

4.70 The surplus expenditure projections have been converted into potential new floorspace estimates in Table 14 in Appendix 2. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £13,000 per sq.m, based on the average turnover of the main food supermarket operators.

4.71 The previous retail study in 2010 suggested a convenience goods floorspace requirement for the district as a whole of 5,103 sq.m net by 2026. The revised projection for 2026 is -167 sq.m net. This projection is lower because of recent food store developments and commitments e.g. Tesco in Swaffham (1,576 sq.m net), Lidl in Thetford (1,029 sq.m net), Thetford Enterprise Park food store commitment (2,578 sq.m net) and the Banham Poultry site food store commitment (1,638 sq.m net).

4.72 Table 4.2 provides a summary of the convenience floorspace projections up to 2036.

Table 4.2: Summary of Convenience Goods Floorspace Projections at 2036

Centre	Net Sales Floorspace	Gross Floorspace
Thetford*	1,793	2,561
Dereham	1,599	2,284
Swaffham	-	-
Watton	221	315
Attleborough*	1,180	1,685
Other Breckland	88	126
Total	**4,881**	**6,971**

Source: Table 14 in Appendix 2 * projections include SUE population

4.73 Construction has not started on the food store commitments at Thetford Enterprise Park and the Banham Poultry site in Attleborough. If these commitments are not implemented then the convenience goods floorspace capacity figures will increase as shown in Table 15 in Appendix 2. The total Breckland district 2036 floorspace projection would increase from 4,881 sq.m net (6,971 sq.m gross) to 8,064 sq.m net (11,521 sq.m gross). The projections would increase primarily in Thetford and Attleborough.

Capacity for Comparison Goods Floorspace

4.74 The household survey suggests that the district's retention of comparison goods expenditure is generally lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, in particular Norwich and Bury St. Edmunds.

4.75 Future improvements to comparison retail provision within the district could help to claw back some additional expenditure leakage from the study area. However, major developments in neighbouring authorities will limit the ability of shopping facilities in the district to increase their market share of expenditure. Some retail development will be necessary in Breckland in order to maintain existing market share in the future. An appropriate strategy for Breckland should be to seek to maintain existing 2014 market shares for the district, in the face of increasing future competition in nearby centres, whilst maintaining the vitality and viability of centres.

4.76 Planned retail commitments in Attleborough (Banham Poultry site) should help to increase the town's market share within its local zone. Adjusted future market shares are shown in Table 6 in Appendix 3. Elsewhere in the district it is realistic and appropriate for the district as a whole to plan to maintain market shares.

4.77 Based on population projections, available comparison goods expenditure has been projected forward to 2016, 2021, 2026, 2031 and 2036 in Tables 7 to 11 in Appendix 3, and summarised in Table 13. Available comparison expenditure to facilities within the district is expected to increase from £205.90 million in 2014 to £425.68 million in 2036.

4.78 As indicated earlier, existing comparison goods floorspace is at best trading satisfactorily and equilibrium in 2014. However in order to maintain the vitality and viability of these existing facilities this base year turnover will need to increase in real terms in the future. Table 13 assumes that the turnover of comparison floorspace will increase in real terms in the future. A growth rate of 2% per annum is adopted, and this growth is required to maintain the health and viability of town centres, as recommended by Experian. Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

4.79 Within Breckland as a whole, retail commitments will absorb expenditure growth up to and beyond 2016. Continued growth will generate a small surplus by 2021, but his will increase to £24.82 million by 2026. This surplus increases to £51.90 million in 2031 and £85.47 million by 2036.

4.80 Surplus comparison expenditure has been converted into net comparison sales floorspace projections at Table 14 in Appendix 3, adopting an average sales density of £5,000 per sq.m in 2016, which is projected to grow by 2% in the future due to improved turnover efficiency. The surplus expenditure at 2036 could support 11,504 sq.m net of sales floorspace (15,339 sq.m gross).

4.81 The previous retail study in 2010 suggested a comparison goods floorspace requirement for the district as a whole of 21,739 sq.m net (28,985 sq.m gross) by 2026. The updated projections within this study update are significantly lower because of the effects of the recession on expenditure growth between 2010 and 2014 and lower future growth forecasts. Table 4.3 provides a summary of comparison floorspace projections up to 2036.

Table 4.3: Summary of Comparison Goods Floorspace Projections 2036 (sq.m)

Centre	Net Sales Floorspace	Gross Floorspace
Thetford*	5,394	7,193
Dereham	3.275	4,366
Swaffham	409	546
Watton	768	1,024
Attleborough*	1,588	2,117
Other Breckland	70	93
Total	**11.504**	**15,339**

Source: Table 14 in Appendix 3 * projections include SUE population

Sustainable Urban Extensions

4.82 Up to 5,000 new dwellings are proposed to the north of Thetford and 4,000 dwellings at Attleborough. Tables 4.4 below estimates the retail expenditure that could be generated by these two residential developments, and then estimates how much of this spending that could be retained within any local provision provided within the development. Table 4.4 converts retained expenditure into floorspace requirements. In undertaking these calculations, the following assumptions have been made:

1. the needs of the new residential development has been considered in isolation, with no inflow from existing residents in the surrounding area;
2. development will be completed between 2016 and 2036, and an average household size of 2.4 people per dwelling (2.4) for the proposed new development is adopted;
3. available convenience and comparison goods expenditure per person is based on the average for the study area zones in 2036;
4. not all of the convenience and comparison goods expenditure will be available to support local retail facilities in the proposed new housing development, as expenditure will continue to be attracted to existing facilities;
5. given the size of the residential developments and using our judgement based on schemes elsewhere, up to 30% of convenience goods expenditure and 10% of comparison goods expenditure could be retained to support the proposed local retail floorspace;
6. for convenience goods, the estimated retention figure reflects the fact that top-up convenience shopping in particular can be carried out locally where appropriate facilities are provided;
7. for comparison goods, a much lower proportion of available expenditure will be retained, recognising that while the scale of any centres proposed within the residential development are such as to justify an element of comparison shopping, consistent with the role of the centres, they would not offer the full range of higher order comparison shopping provided by centres at the upper end of the retail hierarchy; and
8. an average sales density for local shopping facilities of £5,000 per sq.m have been applied, to convert the retained expenditure to floorspace requirements.

4.83 The provision of local shopping facilities is appropriate within developments of this size, in order to ensure residents have day to day shops and services within walking distance of their home, which will reduce car travel.

4.84 Table 4.4 indicates that the number of new dwellings proposed in Thetford is theoretically sufficient to support around 1,900 sq.m gross of Class A1 retail floorspace, as a minimum. The Class A1 estimate for Attleborough is around 1,500 sq.m gross.

Table 4.4: Potential Retail Floorspace Requirements within Strategic Residential Developments

	Thetford	Attleborough
Population		
No. of dwellings	5,000	4,000
Average household	2.4	2.4
Total Population	12,000	9,600
Convenience Goods		
Convenience Goods Expenditure per capita at 2036	£2,157	£2,157
Total Available Convenience Goods Expenditure	£25.88 million	£20.70 million
Retained Convenience Goods Expenditure (30%)	£7.77 million	£6.21 million
Convenience Goods Floorspace Turnover, £ per sq.m	£13,000	£13,000
Floorspace sq.m net	598 sq.m net	478 sq.m net
Floorspace sq.m gross	854 sq.m gross	683 sq.m gross
Comparison Goods		
Comparison Goods Expenditure per capita (2030)	£4,743	£4,743
Total Available Comparison Goods Expenditure	£56.92 million	£45.53 million
Retained Comparison Goods Expenditure (10%)	£5.69 million	£4.53 million
Comparison Goods Floorspace Turnover, £ per sq.m	£7,430	£7,430
Floorspace sq.m net	766 sq.m net	610 sq.m net
Floorspace sq.m gross	1,021 sq.m gross	813 sq.m gross

4.85 The two urban extensions could accommodate around 3,400 sq.m gross of Class A1 retail floorspace. Local shopping provision within the two urban extensions could accommodate about 23% (1,600 sq.m gross out of 6,971 sq.m gross) of the Breckland district convenience goods floorspace projection up to 2036. Local shopping provision could accommodate about 12% (1,800 sq.m gross out of 15,339 sq.m gross) of the Breckland district comparison goods floorspace projection up to 2036.

4.86 Local shopping provision within centres of this scale would not be capable of meeting both main and top-up convenience shopping needs. Typically, local centres serving relatively small catchments would primarily serve top-up food shopping needs. Local centres may typically include a small convenience store under the Sunday Trading Act threshold (280 sq.m net), supported by small units such as a butchers, greengrocers, newsagents etc. and a limited range of comparison and service units typically found in local centres such as a chemist, hairdressers, post office, take away, dry cleaners etc.

4.87 The figures in Table 4.4 suggest a total requirement of around 1,500 to 1,900 sq.m gross of Class A1 retail floorspace. Non-retail services (Class A2 to A5) could increase the size of centre to 1,900 sq.m gross in Attleborough and 2,400 sq.m gross in Thetford.

4.88 Although the population within a strategic residential development scheme could potentially support a local centre, it is essential to ensure that any local centre proposed is both commercially viable and capable of delivery. Further work would need to be produced to support any reserved matters/full planning application for retail floorspace in this location to demonstrate that the development proposed is appropriate in terms of its scale and position within the development, the context of the surrounding area, and whether it is likely to be of interest to retailers.

Qualitative Need for Retail Floorspace

4.89 The section above quantifies the theoretical capacity to support new retail floorspace within Breckland, based on the population projections. The qualitative need for retail facilities also needs to be considered. Qualitative need can be assessed through consideration of the following factors:

- deficiencies or 'gaps' in existing provision;
- consumer choice and competition;
- levels of expenditure retention and leakage;
- overtrading, congestion and overcrowding of existing stores;
- location specific needs such as underserved markets; and
- the quality of existing provision.

Diversity of Town Centre Uses

4.90 Figure 4.3 overleaf shows the composition of each retail centre in terms of the mix and proportion of different uses, i.e. the proportion of shop units within each use class. This is compared to the Goad average mix for all centres across the country. More detailed information on the mix of uses within each centre is shown within the town centre audits in Appendix 5.

4.91 Dereham and Swaffham town centres have a reasonable proportion of comparison shops when compared to the national average. Thetford has a particularly low proportion of comparison for a centre of its size. Generally, larger centres have a higher proportion of comparison shop units than smaller centres. Larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. Smaller centres tend to have a higher proportion of convenience goods units and non-retail service uses, serving the local/day to day needs of their catchment area.

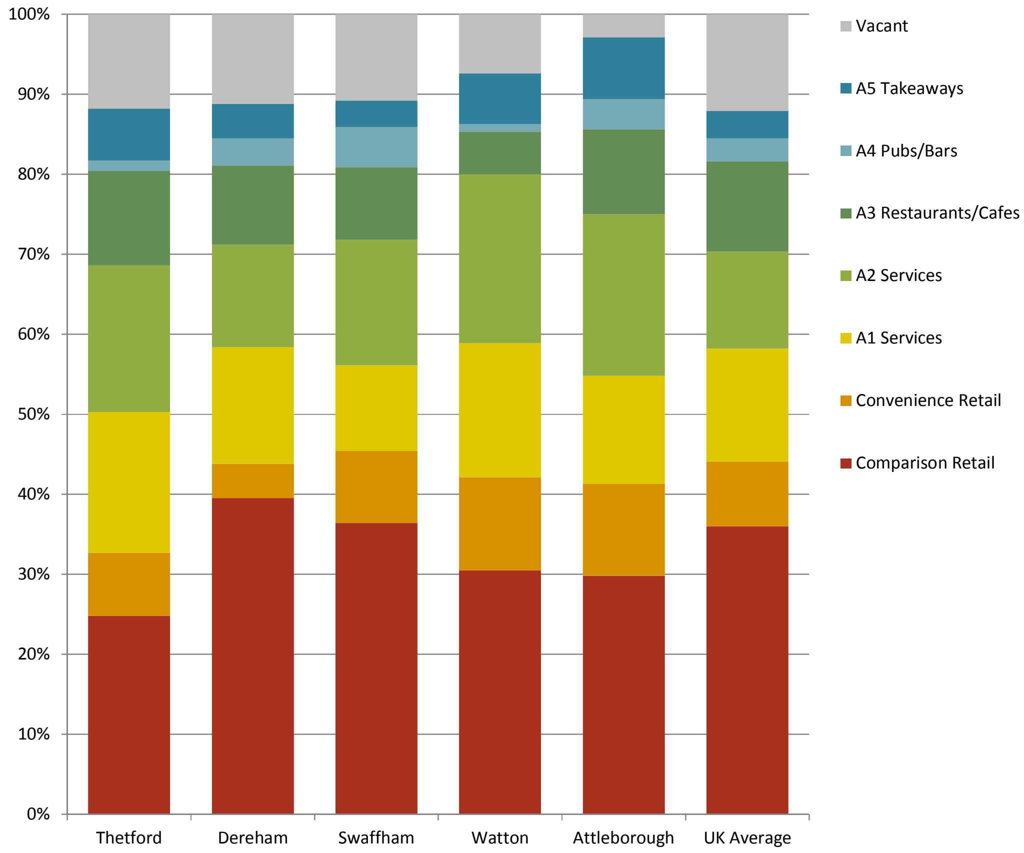
4.92 All the centres have a reasonable or high proportion of Class A1 non-retail services and Class A2 financial /professional services. Thetford, Watton and Attleborough have a relatively high proportion of Class A5 takeaways.

4.93 Watton and Attleborough have a lower proportion of comparison goods shops, but a higher proportion of convenience goods retail. This reflects their day to day shopping and service roles.

4.94 Vacancy rates are comparable to the national average in Thetford, Dereham and Swaffham, and below average in Watton and Attleborough.

4.95 Evening economy uses (restaurants, café, bars and pubs) area comparable with the national average in Thetford, Dereham and Swaffham, but below average in Watton and Attleborough.

Figure 4.3: Mix of Uses by Unit (%)



Convenience Goods Shopping

4.96 The household survey results indicate that most residents in the study area undertake both a main shopping trip and top-up shopping trips. Main shopping trips are generally made once a week or less often, and the household survey identified that over 89% of respondents travel to do their main food shopping by car (both driver and passenger). The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores are the usual destination for these types of shopping trip.

4.97 There are four food superstores over 2,500 sq.m net within the district, i.e. Tesco stores in Thetford and Dereham and a Sainsbury's store in Thetford and a Morrison's store in Dereham (see Table 12 in Appendix 2). These superstores are supported by a good range and choice of smaller supermarkets and discount retailers. There are planning permissions for a new superstore and Lidl store in Thetford. Thetford and Dereham retain a reasonably high proportion (64% and 81% respectively) of convenience goods expenditure within their respective study area zones. The retention rate is lower in Thetford because Zone 1 includes Brandon and Lakenheath. There is no qualitative deficiency in existing/proposed food store provision in Thetford or Dereham.

4.98 Swaffham has five large food stores, including Waitrose and Tesco stores of around 2,000 sq.m net, which are suitable for main and bulk food shopping. There is an excellent range and choice of food and grocery shopping provision in Swaffham. Swaffham retains a high proportion (66%) of convenience goods expenditure within its respective study area zone, bearing in mind much of Zone 3 includes villages that are closer to Dereham. The retail capacity figures suggest Swaffham has an over-provision of convenience good floorspace for the foreseeable future. There is no quantitative or qualitative need for further convenience goods retail provision in Swaffham.

4.99 Watton has two food stores, i.e. Tesco and Co-op stores. The Tesco store has been extended (to around 1,500 sq.m net) and is suitable for main and bulk food shopping. The Co-op store caters for basket and top-up shopping. Watton retain about half of the convenience goods expenditure within its study area zone. Much of Zone 4 includes villages that are closer to Dereham. The retail capacity figures suggest there is limited expenditure capacity in Watton to support new food store development for the foreseeable future. There is no quantitative or qualitative need for further convenience goods retail provision in Watton.

4.100 Attleborough two food stores, i.e. Sainsbury's and Lidl. The Sainsbury's store (1,433 sq.m net) is suitable for main and bulk food shopping and the Lidl store is being extended (to 1,220 sq.m net). Attleborough retains a reasonably high proportion (62%) of convenience goods expenditure within its respective study area zone, bearing in mind Zone 5 includes villages that are closer to Norwich and Watton.

4.101 There is planning permission for a new food store (2,340 sq.m net) at the Banham Poultry site. This commitment is expected to increase Attleborough's market share in Zone 5 from 62% to 67%. There is no qualitative deficiency in existing/proposed food store provision in Attleborough.

4.102 The audit of main centres in Appendix 5 indicates that Swaffham, Watton and Attleborough have a good choice of smaller convenience goods shops. Thetford has a reasonable provision of small shops, but Dereham has a below average proportion of small convenience good shops in the town centre.

High Street Comparison Shopping

4.103 Thetford and Dereham are the main comparison shopping centres in Breckland, and provide a reasonable range of comparison shops. The other smaller centres (Swaffham, Watton and Attleborough) have a more limited selection of comparison shops. The lower order comparison shopping facilities within these smaller centres, including comparison sales in food stores, help to ensure that day to day shopping needs of residents are served locally and prevent the need for residents to travel to larger towns for all forms of shopping.

4.104 Thetford and Dereham have a reasonable selection of national multiples for centres of their size, supported by a good selection of specialist independent traders. However the number of comparison good shops within the town centres has reduced since 2010.

4.105 Thetford and Dereham have the highest levels of comparison goods expenditure retention within the district (41% and 47% in their respective zones). Based on NLP's experience these retention rates are reasonable for towns of this size within the catchment areas of sub-regional centres e.g. Norwich and Bury St Edmunds.

4.106 The smaller centres (Swaffham, Watton and Attleborough) have a number of independent retailers that provide specialist shopping and a much smaller number of national multiples. The number of multiple retailers within Thetford and Dereham is not comparable with those available in Norwich, Kings Lynn, Bury St Edmunds or Cambridge. Swaffham, Watton and Attleborough have much lower levels of comparison goods expenditure retention within their respective zones (17%, 25% and 17% respectively).

4.107 The centre audits in Appendix 5 indicate that Dereham and Swaffham have slightly higher proportions of comparison retail units when compared with the national average. The three other centres have a below average proportion of comparison goods shops. Dereham has the best representation of comparison goods retailers (92 units) in the town centre. Swaffham has 44 comparison shops compared with 38 in Thetford. However comparison shops within Thetford are generally much larger than the small historic shop premises in Swaffham.

4.108 Given the scale, quality and range of shopping facilities available in these larger centres a high proportion of comparison expenditure within the study area is spent outside the district, particularly in the south and east of the district. Investment will be needed in the district in order to retain existing levels of comparison goods expenditure. The objective of the retail development strategy for Breckland should be to maintain the district's shopping role and market share within the sub-region, in the face of increasing competition. The economic projections in this section assume that new development will retain the district's share of comparison expenditure in the study area and will help to maintain this share in the future.

4.109 The district has a good selection of retail warehouse stores, mostly located in Thetford and Dereham. Retail warehouses in Thetford and Dereham account for 21% of comparison goods retail floorspace within the district, which based on NLP's experience within predominantly rural districts is a relatively high figure. There is planning permission for an additional retail warehouse unit (859 sq.m net) at Thetford Retail Park. A planning permission for another phase of development at Forest Retail Park in Thetford has now lapsed.

4.110 There are three large DIY stores Wickes and B&Q in Thetford and Homebase in Dereham. Both towns also have Carpetright, Halfords and pet stores.

4.111 There is planning permission for two bulky goods retail warehouse units (totalling 1,200 sq.m net) on the Banham Poultry site in Attleborough, which if implemented will improve retail warehouse provision.

4.112 The bulky goods sector has been hit hard by the economic downturn and operator demand for premises is weak, and this is likely to continue in the short term. In the longer term there may be potential to improve this sector. Thetford and Dereham are the most likely locations for this form of retailing.

5.0 Requirements for Other Town Centre Uses

Introduction

5.1 This section assesses the potential for commercial leisure and other town centre uses in Breckland, including for a cinema, tenpin bowling, bingo, theatres, nightclubs, private health/fitness clubs and catering/pubs/bars.

Commercial Leisure

5.2 There is a relatively limited range of large commercial leisure and entertainment facilities within the district, with many residents utilising facilities in neighbouring authorities i.e. Norwich and Bury St Edmunds.

5.3 Based on NLP's experience and household surveys from across the country, commercial leisure facilities usually draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

5.4 The Breckland Study Area population has good access to major leisure facilities in Norwich and Bury St Edmunds. The proximity of major leisure facilities in these surrounding local authorities may limit the potential for major commercial leisure facilities within the district.

Cinemas

5.5 Breckland has one small cinema, i.e. Hollywood Cinema in Dereham (3 screens). Major competing centres, including Bury St Edmunds, Stowmarket, Norwich and Cambridge have several large multiplex facilities as outlined below, which may restrict the catchment area of potential additional cinema provision in Breckland:

- Cineworld Cinemas, Bury St Edmunds (9 screens);
- Regal Cinema, Stowmarket (1 screen);
- Hollywood Cinemas, Anglia Square, Norwich (3 screens);
- Vue Cinema, Golden Ball Street, Norwich (8 screens);
- Odeon Cinema, Riverside Leisure Park, Norwich (12 screens);
- Cinema City, St. Andrew's Street, Norwich (3 screens);
- Cineworld Cinemas, Cambridge Leisure Park, Cambridge (9 screens);
- Vue Cinema, The Grafton Centre, Cambridge (8 screens); and
- Hollywood Cinema, Fakenham (3 screens).

5.6 The household survey results indicate that most residents within the study area visit cinemas in Norwich (42%), Bury St Edmunds (30%) and Dereham (21%).

Large multiplex cinemas in competing settlements will restrict the catchment area of potential additional cinema provision within Breckland.

5.7 To assess the theoretical demand for cinema provision within the district, it is assumed that up to 50% of cinema trips can be retained within the area (compared with the current figure of only 21.3%). The area's catchment population has been converted into a total number of cinema screens and seats based on the current national average (16,300 people per screen and 78 people per seat – NLP CineScope). The results are shown in Table 5.1 below.

Table 5.1 Cinema Potential in Breckland Study Area

	2016	2021	2026	2031	2036
Study Area Population	174,415	180,725	186,869	192,306	197,244
Market Retention	50%	50%	50%	50%	50%
Catchment potential	85,708	90,363	93,435	96,153	98,622
Cinema Screen Potential	**5.3**	**5.5**	**5.7**	**5.8**	**6.1**
Cinema Seat Potential	**1099**	**1159**	**1198**	**1233**	**1264**

5.8 The analysis above suggests there is scope for between 5 and 6 screens within the district. The existing Hollywood Cinema in Dereham (3 screens) and the proposed 3 screen cinema at the former Anchor Hotel site in Thetford will meet this demand.

Theatres

5.9 Dereham Theatre Company is the only theatre provision located within the district. The household survey indicates that 40% of respondents in the study area visit theatres, and of these 69% last visited a theatre in Norwich, followed by 15% in Central London. Only 1.2% last visited the theatre in Dereham.

5.10 The accessibility of Breckland to Norwich has an impact on the likely demand for theatre facilities in the district. The relatively short journey to Norwich will help meet the district's need for high profile, national performances. There is no clear need for additional theatre provision in the district, however if proposals were brought forward they should be considered favourably because this would enhance the overall offer of Breckland and improve the retention of theatre trips in the district.

Private Health and Fitness Clubs

5.11 There are a number of private health and fitness clubs in Breckland as follows:

- Barretts Health & Fitness, High Street, Dereham;
- Everybody Health & Fitness, Whitsands Road, Swaffham;
- Body Concept, Roman Way, Thetford;
- Vinnies Gym, Queens Square, Attleborough;
- Park Fitness, Attleborough;
- Watton Sports & Social Club, Watton;

- Old Hall Country Club and Leisure Centre, Thetford.

5.12 There are four private finance initiative run facilities below, one in each town centre in the district:

- Breckland Leisure Centre & Waterworld, Thetford;
- Swaffham Leisure Centre, Swaffham;
- Attleborough Sports Hall, Attleborough (evenings/weekends only); and
- Dereham Leisure Centre, Dereham.

5.13 Sport England identifies 7 public run health and fitness suites (including 3 educational facilities) in Breckland and 3 private sector suites, 10 in total.

5.14 Breckland has at least 11 public and private health and fitness clubs. The household survey indicates that 24% of respondents or their families visit a health/fitness club. Of these, 56% did so at destinations within the main towns in the district.

5.15 Breckland Study area's adult population (18 and over) is approximately 137,600 in 2014, which could generate demand for about 16,500 public and private gym membership places, based on the national average membership rate (12%). Information provided by Sport England's Local Sport Profile Tool suggests that the proportion of adults in Breckland who are physically active (52.8%) is slightly lower than the England average (56.6%) and East of England average (57.1%). Similarly, the participation in sport (at least once a week) in Breckland is 27.9%, compared to the England average of 35.7%. On this basis, while it is robust to adopt the national average membership and participation rates, these rates are likely to be higher than the actual participation levels in Breckland.

5.16 This potential membership estimate and the 11 health and fitness clubs identified above, imply an average of around 1,500 members per club, which is higher than the national average for private fitness clubs (1,375 members). However the lower than average participation rates suggest existing facilities in Breckland are sufficient to meet existing demand.

5.17 The adult population of Breckland is expected to increase by around 20,000 between 2014 and 2036. This population growth could generate demand for about two additional health and fitness clubs, based on national participation rates.

Tenpin Bowling

5.18 Breckland has one bowling alley, Strikes in East Dereham (12 lanes). Within other towns outside the study area there is: Namco Funscape in Norwich (30 Lanes), Hollywood Bowl in Norwich (26 lanes), Ten Pin Ltd at Cambridge Leisure Park (28 lanes), Bury Bowl in Bury St Edmunds (12 lanes) and Fakenham Superbowl (6 lanes).

5.19 The household survey indicates that residents who visit bowling facilities in the district mainly go to Dereham (39% of respondents), followed by Norwich (32% of respondents). The household survey results suggest that about 28% of households in the study area visit tenpin bowling facilities. The study area population as a whole (172,049 in 2014) could theoretically support about 14 lanes, based on one lane per 12,000 people, or 16 lanes in 2036. There is only theoretical capacity for an additional four lanes within the study area up to 2036, assuming 100% trip retention. A further ten pin bowling facility is unlikely to be commercially viable, although Thetford has the best prospects for attracting an operator.

Bingo

5.20 Just over 7% of respondents to the household survey stated that they play bingo, of these 46% play bingo in Thetford, 11% in Dereham and 19% in Norwich.

5.21 Breckland Study Area’s adult population (about 137,600 adults) could generate about 240,800 admissions based on the national participation rate (1.75 per adult). The national average is 113,000 admissions per annum per club.

5.22 Based on national average figures (113,000 admissions per club), Breckland’s adult population could support two bingo facilities.

5.23 The study area has two bingo clubs, Breckland Bingo and Social Club, Thetford and Winners Bingo and Social Club, Thetford. These figures suggest existing bingo provision in the study area is sufficient to meet demand.

5.24 The adult population of Breckland is expected to increase by around 20,000 between 2014 and 2036. This population growth is not sufficient to support an additional bingo facility.

Nightclubs

5.25 There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 adults (source: Mintel). Large nightclubs (capacity of up to 2,000 people) are generally located in large towns with a population of over 100,000 people.

5.26 Only 7.4% of households interviewed in the study area indicated they visit nightclubs, and of these over 80% visit Norwich and 5% visit Cambridge.

5.27 There are a small number of late night venues in Breckland, including Club Ice in Thetford, but there are no large branded clubs within the district. There are venues that hold live music events.

5.28 Breckland Study Area’s adult population (about 137,600 adults) could in theory support 4-5 nightclubs, however the district’s relatively dispersed population and nightclub facilities within larger centres, particularly Norwich, will limit potential within Breckland.

Other Services, Restaurants, Bars and Takeaways

5.29 Service uses perform an important role in the overall offer of a centre, and encourage customers to shop locally. The service uses are categorised as follows:

- **Class A1 services** cover a range of uses, including hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as Class A3), funeral parlours and post offices.
- **Class A2 services** include banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies.
- **Class A3/A5** includes restaurants, cafés (A3) and takeaways (A5).
- **Class A4** pubs/bars (Class A4).

5.30 Food and beverages is a fast moving and creative sector, with a steady flow of new concepts emerging. Within this sector there has been a significant increase in the number of national multiple chains. These national chains have sought to increase their geographical coverage. These types of food and drink operators (Class A3 and A4) i.e. restaurants, bars and pubs have supported other major leisure uses, in particular cinema developments. Within town centres the demand has increased, including a significant expansion in the number of coffee shops, such as Starbucks, Costa Coffee and Coffee Republic.

5.31 National branded pub/restaurant chains have invested heavily and not exclusively in larger centres. Themed restaurants have also expanded rapidly. The key categories for food and beverage offers are:

1 **impulse:** characterised by their produce range that is typically highly visual and hand-held so that it can be eaten “on the go”;

2 **speed eating fast food:** food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;

3 **refuel and relax:** a drink and snacks and a short break in a pleasant environment rather than focusing on eating a main meal; and

4 **casual dining/leisure dining:** incorporating a number of food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.

5.32 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks and are important services within town and local centres. National information available from Experian Goad indicates that the proportion of non-retail uses within town centres across the country has increased significantly. A balance between Class A1 and Class A3 to A5 uses needs to be maintained. The mix of uses in the main centres in the district is shown in Table 5.2.

5.33 Breckland town centre's proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) generally mirror the national average. The proportion of takeaways within Swaffham is higher than the national average, but only by 1.6%. The proportion of restaurants/cafés is slightly below the national average in all centres, excluding Thetford, particularly so in Watton. The proportion of pubs and bars is higher than the national average in all centres.

Table 5.2 Breckland Centres Use Class Mix

Use Class	Proportion of Total Number of Units (%)					
	Thetford	Dereham	Swaffham	Watton	Attleboro'	UK
A1 (Retail)	32.7	43.8	45.4	42.1	41.3	44.1
A1 (Service)	17.6	14.6	10.7	16.8	17.3	14.1
A2	18.3	12.8	15.7	21.1	20.2	12.1
A3	11.8	9.9	9.1	5.3	9.6	11.3
A4	6.5	4.3	3.3	6.3	6.8	2.9
A5	1.3	3.4	5.0	1.0	1.9	3.4
Vacant	11.8	11.2	10.8	7.4	2.9	12.1
Total	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Breckland Lane Use Survey 2014 and Experian Goad Plans

Food and Beverage Expenditure

5.34 Experian's latest 2012 local expenditure figures have been adopted. Food and beverage (FAB) expenditure per capita projections are shown in Table 2, Appendix 4. These figures indicate that the average expenditure in the study area for food and beverages consumed away from the home plus takeaways eaten at home is £861 per capita in 2014. The total FAB expenditure in the study area is £148.16 million.

5.35 FAB expenditure per capita is expected to increase in real terms (excluding inflation) by 36% between 2014 and 2036. Taking into account population growth, total FAB expenditure within the study area is expected to increase from £148.16 million in 2014 to £230.56 million in 2036, an increase of about 56% (Table 3, Appendix 4).

Food and Beverage Expenditure Patterns

5.36 Existing FAB expenditure patterns have been modelled based on the household survey results within the study area zones.

5.37 Base year (2014) penetration rates are shown in Table 4, Appendix 4 and expenditure patterns are shown in Table 5. The estimated expenditure currently attracted to facilities within Breckland is £71.92 million in 2014. The retention rate is reasonably high across all zones, ranging from 25.6% to 52.1%. There is likely to be limited potential to increase market share in the future due to competing larger destinations.

Future Food and Beverage Capacity

5.38 The household survey suggests that the district's retention of FAB expenditure is reasonable. An appropriate strategy for Breckland is to seek to maintain existing market shares, and the capacity projections in Appendix 4 are based on this approach.

5.39 Available FAB expenditure has been projected forward to 2036 based on constant 2014 market shares in Tables 5 to 10. Existing facilities are expected to increase their turnover by 1% per annum. Future available expenditure is compared with the projected turnover of existing facilities in Table 12 in Appendix 4.

5.40 Surplus expenditure has been converted into floorspace projections in Table 13, Appendix 4, using an average sales density of £5,000 per sq.m gross, inflated by 1% per annum. The floorspace projections are broken down in Table 5.3 below.

Table 5.3 Food and Drink Floorspace Projections

Centre	Floorspace (sq.m gross - cumulative)			
	By 2021	By 2026	By 2031	By 2036
Thetford	490	852	1,196	1,526
Dereham	154	268	381	496
Swaffham	33	57	82	106
Watton	28	49	69	89
Attleborough	337	587	823	1,050
Rest of district	142	246	347	446
Total	**1,185**	**2,059**	**2,897**	**3,715**

Source: NLP FAB capacity model Table 13 in Appendix 4

Other Class A1 and A2 Service Uses

5.41 The retail, food and drink floorspace projections do not include non-retail Class A1 services or Class A2 services. The demand for non-retail service floorspace cannot be calculated in the same way as retail and food/ beverage sectors, because there is no direct link between population, expenditure and floorspace required. The demand for Class A2 and B1office space should form part of an employment land assessment rather than a retail/town centre study.

5.42 Notwithstanding these difficulties in quantifying the likely need for non-retail service floorspace, a qualitative analysis of existing provision compared with the national average mix of uses within town centres provides some guidance on the likely requirement for new floorspace in this sector.

5.43 Based on the Goad national average, one would expect around 20% of shop premises to be occupied by these non-retail service uses within centres, or about 10% of total floorspace.

5.44 The proportion of Class A1 and Class A2 services is relatively high in Thetford (35.9%), Watton (37.9%) and Attleborough (37.5%), compared with the Goad national average of 26.2%. The figures for Dereham (27.4%) and Swaffham (26.4%) are above but similar to the national average.

5.45 Given the relatively high provision of Class A1/A2 service uses in the district, development should provide around 5% of total new floorspace for these service uses.

5.46 Floorspace projections for other non-retail services are shown in Table 6.1 later in this report.

Conclusions

5.47 It is important to maintain a reasonable proportion of leisure and service uses in the district and additional floorspace should be provided over the plan period.

5.48 Breckland's relatively dispersed population and the availability of commercial leisure facilities within larger centres such as Norwich and Bury St Edmunds will constrain the potential for new facilities in Breckland. The key conclusions are:

1. existing and proposed facilities are sufficient to meet the demand for cinemas, bingo halls and theatres;
2. population growth could generate demand for about two additional health and fitness clubs;
3. a further ten pin bowling facility is unlikely to be commercially viable, although Thetford has the best prospects for attracting an operator.
4. there is a potential requirement for an additional 3,715 sq.m gross of Class A3/A4/A5 floorspace in the district up to 2036.

6.0 Accommodating Growth

Introduction

6.1 The National Planning Policy Framework (NPPF) indicates (paragraph 23) that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. The need for development should be met in full and should not be compromised by limited site supply. In order to accommodate growth, local planning authorities should assess the need to expand town centres to ensure a sufficient supply of suitable sites. The NPPF (paragraphs 23 and 24) indicates local planning authorities should apply a sequential approach for development.

6.2 The National Planning Policy Guidance indicates that development plans should develop (and keep under review) town centre strategies that plan for a 3-5 year period, whilst also giving a Local Plan lifetime view. Plans should identify the scale of need for main town centre uses and assess whether the need can be met on town centre sites or through expanding centres, with the sequential test to be followed.

6.3 The PPG acknowledges that not all successful town centre regeneration projects are retail-led, or will involve significant new developments. Public realm, transport and accessibility improvements can play important roles. Town centre car parking strategies, in a move away from resisting parking in town centres, are to encourage improvements to both the quality and quantity of car parking provision, where required to enhance the performance of town centres.

6.4 This section assesses the scope to accommodate growth within and on the edge of Breckland's main centres.

Floorspace Projections

6.5 The floorspace projections set out in the previous sections assume that new shopping facilities within Breckland can maintain and in some cases improve their current market share of expenditure within the study area, recognising that other competing centres will improve in the future. There are a number of issues that may influence the scope for new floorspace and the appropriate location for this development, as follows:

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections;
- the effect of internet/home shopping on the demand for retail property;
- the level of operator demand for floorspace in Breckland;

- the likelihood that Breckland's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

6.6 The PPG suggests town centre strategies should plan for a 3-5 year period, but the longer term plan period should be considered. Projections up to 2021 are realistic and are based on up to date forecasts, which take into account the effects of the recession. The long term floorspace projections (up to 2026 and beyond) should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development management decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review.

6.7 The expenditure projections in this study take into account home shopping made through non-retail businesses, because special forms of trading have been excluded. The study assumes that special forms of trading will increase in the future, including the growth of internet shopping. The impact of internet growth on the demand for retail floorspace is unclear. Some retailers' home delivery and internet services utilise existing stores rather than warehouses, for example Tesco Direct. Growth in internet sales will not always reduce the demand for shop floorspace. In addition, some of the growth in internet sales may divert trade away from mail order companies rather than retail operators. Overall the long term impact of home shopping on expenditure projections is uncertain.

6.8 The quantitative and qualitative assessment of the potential for new retail floorspace within the previous sections suggests there is scope for new retail development within Breckland district during the Plan period (to 2036). This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

6.9 The projections up to 2036 suggest there is scope for 6,972 sq.m gross of convenience goods floorspace, 15,339 sq.m gross of comparison goods floorspace and 3,715 sq.m gross of Class A3 to A5 space. Table 6.1 below summarises the floorspace projections by centre in 2036.

6.10 These projections take into account population growth within Sustainable Urban Extensions (SUE) in Thetford and Attleborough. The convenience goods floorspace projections indicate there is significant over-provision within Swaffham over the plan period. The floorspace capacity projections assume this over-provision will continue in the future i.e. expenditure capacity in other towns in the district has not be transferred to Swaffham, which if achieved would reduce the need for new convenience goods floorspace within other towns.

6.11 These projections relate to Class A1 retail uses and Class A3 to A5 uses only. Based on the current mix of floorspace within centres in Breckland, there should also be scope for around 5% of additional floorspace that can be occupied by Class A1 non-retail services and Class A2 uses.

Table 6.1: Summary of Floorspace Projections 2036 (sq.m gross)

Centre	Convenience	Comparison	Food/Drink	Service Uses	Total
Thetford*	2,561	7,193	1,529	594	11,877
Dereham	2,284	4,366	496	376	7,522
Swaffham	-	546	106	34	686
Watton	315	1,024	89	75	1,503
Attleborough*	1,685	2,117	1,050	255	5,107
Other Breckland	126	93	446	35	700
Total	**6,971**	**15,339**	**3,715**	**1,369**	**27,394**

Source: Table 14 in Appendix 2, Table 14 in Appendix 3, Table 13 in Appendix 4

* projections include SUE population

Accommodating Future Growth

6.12 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development.

6.13 The existing stock of premises will have a role to play in accommodating projected growth, during the economic recovery. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. For comparison goods, a growth rate of 2% per annum is assumed. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

6.14 There are currently 67 vacant shop units within the five main centres (Thetford, Dereham, Swaffham, Watton and Attleborough), which equates to an overall vacancy rate of 10.5%, which is just below the Goad national average (12.1%). The amount of vacant floorspace is about 7,400 sq.m gross.

6.15 Vacant premises should help to accommodate growth. For example, if the current vacancy level fell to 5% in each town centre then the number of reoccupied units would be 33, which could accommodate about 3,600 sq.m gross of Class A1 to A5 retail space. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows.

- Thetford 900 sq.m gross;
- Dereham 1,800 sq.m gross;
- Swaffham 600 sq.m gross; and
- Watton 300 sq.m gross.

6.16 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2036 would reduce from 27,400 sq.m gross to 23,800 sq.m gross.

6.17 The short term priority should be the reoccupation of vacant floorspace, but this should not preclude investment within appropriate town centre locations.

Potential Development Opportunities

6.18 The 2010 Study identified a list of 14 potential development sites (town and edge of centre) as having 'good' or 'reasonable' potential for retail and/or leisure uses. Key changes relating to the potential availability of sites since the 2010 study is summarised below.

Thetford

6.19 As indicated above, the reoccupation of vacant units could reduce the Class A1 to A5 floorspace projection marginally from 11,900 sq.m gross to 11,000 sq.m gross.

6.20 As indicate above, these projections take into account population growth within the SUE in Thetford (about 5,000 new dwellings). Policy TH31 requires two local centres within the SUE totalling 1,700 sq.m net (about 2,400 sq.m gross) of comparison and convenience goods retail space. NLP's capacity assessment in Section 4 suggest a similar amount of Class A1 to A5 (2,400 sq.m gross, 1,700 sq.m net) could be provided within the Thetford SUE at 2036.

6.21 The outline planning permission for the SUE allocates around 2.5 hectares for local centres but does not specify the amount of retail floorspace. The planning committee report refers to 510 sq.m gross of Class A1 floorspace within the primary centre and up to 170 sq.m gross within seven neighbourhood centres (up to 1,190 sq.m gross). The total amount of Class A1 retail could therefore total 1,700 sq.m gross.

6.22 The committee report also refers to 450 sq.m gross of Class A2, A3 and A4 and 150 sq.m gross of Class A5, but it is not clear whether this is the total for all centres or the limit within each centre. The report implies that the precise mix of uses within the primary and local centres will be determined as part of the reserved matters application.

6.23 Six potential development sites were identified in Thetford in the 2010 Study. The status of three of sites remains unchanged since 2010, and still have 'good' to 'reasonable' potential to accommodate future development, as follows:

- **Site T1**: Carnegie Community Hall up to 1,000 sq.m gross;
- **Site T4**: Riverside Walk up to 2,000 sq.m gross;
- **Site T5**: Tanner Street Car Park up to 500 sq.m gross.

6.24 All three sites are located within the Primary Shopping Area.

6.25 **Site T2**: the Minstergate area was identified as two separate opportunity sites in the 2010 study. The area was identified as an opportunity area in the Thetford Area Action Plan and is within the Primary Shopping Area, and part of the site has emerging proposals for a new bus interchange.

6.26 The vacant buildings between Minstergate and St Nicholas Street were identified as having potential for refurbishment and reuse for commercial uses. This area is being developed for residential uses. A residential development has been implemented on land adjacent to the Burrell Museum.

6.27 The area south of Minstergate is still occupied by Wilkinson and Poundstetcher, but retail/leisure use could be intensified i.e. two levels. If comprehensively redeveloped the area south of Minstergate could accommodate an additional 3,000 sq.m gross of commercial floorspace.

6.28 **Site T3**: Bridge Street Car Park/Anchor Hotel was vacant in 2010 and has now been demolished. The bus station will be relocated from the site. The 2010 study indicated that the site could accommodate up to 4,000 sq.m gross of retail/commercial space at ground floor level, within the Primary Shopping Area. The education centre use proposed on the hotel site was not implemented.

6.29 There is a new planning permission for a hotel, 3-screen cinema and about 1,000 sq.m gross of retail/restaurant uses on the former Anchor Hotel site.

6.30 At Thetford Retail Park, there is planning permission for infill development. This commitment has been taken into account within the capacity figures. The opportunity area to the south west of the retail park has been occupied since 2010.

6.31 In total the identified opportunities in Thetford town centre could provide up to 7,500 sq.m gross of additional floorspace. Vacant shop units and these development opportunities (if implemented) could accommodate the majority (70%) of the Thetford floorspace projections up to 2036.

6.32 Local shopping facilities within the Thetford Urban Extension area could assist in meeting much of the remaining need for new Class A1 to A5 floorspace.

Dereham

6.33 The reoccupation of vacant units could reduce the Class A1 to A5 floorspace projection from 7,500 sq.m gross to 5,700 sq.m gross.

6.34 Three potential development sites were identified in Dereham in the 2010 Study.. The status of these sites remains broadly unchanged, and these sites still have ‘good’ or ‘reasonable’ potential to accommodate future development, as follows:

- **Site D1:** TA Centre/Car sales garage up to 2,500 sq.m gross;
- **Site D2:** Land north of Georges Road up to 2,000 sq.m gross; and

- **Site D3:** Inland Revenue building approximately 200 sq.m gross.

6.35 The TA Centre is outside the Primary Shopping Area but is within the town centre boundary. In terms of the sequential approach for retail development it is in an edge-of-centre location.

6.36 The Wrights Walk Phase 2 planning permission has lapsed. The site was expected to accommodate about 1,800 sq.m gross. This site still has good development prospects and should assist in meeting future growth as and when the market improves.

6.37 No additional development opportunities have been identified. In total these three development opportunities and reoccupied vacant shop units within Dereham town centre could provide up to 8,100 sq.m gross of additional Class A floorspace.

6.38 If implemented these opportunities are more than sufficient to meet the overall projection for Dereham (7,500 sq.m gross).

Swaffham

6.39 The retail analysis suggests there is a significant over-provision of convenience goods sales floorspace in Swaffham. It is possible some of this floorspace will become available for other town centre uses.

6.40 The reoccupation of vacant units could reduce the Class A1 to A5 floorspace projection marginally from 700 sq.m gross to 100 sq.m gross. Vacant shop premises could meet most of the projected need up to 2036.

6.41 Only one potential development site was identified in Swaffham in the 2010 Study. The Post Office was identified as having ‘reasonable’ development potential in the medium to long term. The adjacent Sixth Form Centre was identified as a potential alternative development site with the Post Office. This amended site could accommodate up to 1,000 sq.m gross, if additional floorspace is required in Swaffham. This site and vacant units are sufficient to meet projected capacity up to 2036.

Watton

6.42 The reoccupation of vacant units could reduce the Class A1 to A5 floorspace projection marginally from 1,500 sq.m gross to 1,200 sq.m gross.

6.43 The proposed extension to the Tesco store has been implemented and taken into accounted within the retail capacity projections.

6.44 The only site still potentially available for retail development is the Memorial Car Park, which could provide up to 500 sq.m gross. Land south of the High Street has been developed for residential use (Saxon House) and land south of Tesco is now used for allotments.

6.45 Vacant shop units and this opportunity site (if implemented) could accommodate about half of the floorspace projections up to 2036. Remaining capacity could be transferred to Dereham and Thetford.

Attleborough

6.46 There is limited potential for vacant units to accommodate growth in Attleborough. The planning permission for the food store and bulky goods retail warehousing at the Banham Poultry site has been taken into account within the retail capacity projections. These developments are expected to increase Attleborough's market share of expenditure. If these increased market shares are maintained up to 2036, then this is scope for an additional 5,100 sq.m gross.

6.47 As indicate above, these projections take into account population growth within the SUE in Attleborough (about 4,000 new dwellings). NLP's capacity assessment in Section 4 suggest at least 1,900 sq.m gross of Class A1 to A5 could be provided within the Attleborough SUE at 2036

6.48 Three potential development sites were identified in Attleborough town centre in the 2010 Study, as follows:

- Sainsbury/Telephone Exchange up to 1,000 sq.m gross;
- Esso Garage up to 1,000 sq.m gross;
- Griffin Lane Exchange St up to 500 sq.m gross.

6.49 The Sainsbury/Telephone Exchange is now considered unlikely to become available. The status of the two other sites remains broadly unchanged, and both sites are located within the Primary Shopping Area. No additional development opportunities have been identified in the town centre.

6.50 These two opportunity sites (if implemented) could accommodate about 30% of the floorspace projections up to 2036. In the longer term (after 2021) much of the remaining capacity could be accommodated within local centres to serve major residential development in Attleborough.

7.0 Conclusions and Recommendations

Introduction

7.1 This report provides an update of the district wide needs assessment for retail and commercial leisure development in Breckland. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in Breckland

7.2 The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail and commercial leisure development over the plan period up to 2036.

7.3 When planning for growth in their town centres, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability.

7.4 Long term forecasts up to and beyond 2026 may be more susceptible to change, due to unforeseen circumstances. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the district should be monitored along with the effect proposals may have on the demand for additional development in Breckland.

Convenience Goods Retail

7.5 The quantitative assessment of the potential capacity for retail floorspace suggests that there is scope for new development within Breckland, over and above planned commitments. The convenience goods projections, suggest new floorspace could be distributed as follows:

Table 7.1: Convenience Goods Retail Floorspace Projections (Net Sales)

Location	Additional Convenience Retail Floorspace (sq.m net)			
	2014 - 2021	**2021 - 2026**	**2026 - 2036**	**Total 2014 - 2036**
Thetford	0	346	1,447	**1,793**
Dereham	645	296	658	**1,599**
Swaffham	0	0	0	**0**
Watton	0	60	155	**215**
Attleborough	0	369	797	**1,166**
Other Breckland	0	24	62	**86**
Total	**645**	**1,095**	**3,119**	**4,859**

Source: Table 14, Appendix 2

Table 7.2: Convenience Goods Retail Floorspace Projections (Gross)

Location	Additional Convenience Retail Floorspace (sq.m gross)			
	2014 - 2021	2021 - 2026	2026 - 2036	Total 2014 - 2036
Thetford	0	494	2,067	**2,561**
Dereham	922	423	939	**2,284**
Swaffham	0	0	0	**0**
Watton	0	94	221	**315**
Attleborough	0	547	1,138	**1,685**
Other Breckland	0	38	88	**126**
Total	**922**	**1,596**	**4,453**	**6,971**

Source: Table 14, Appendix 2

7.6 There is no qualitative deficiency in existing/proposed food store provision in Thetford, Dereham or Attleborough. Swaffham has an excellent range and choice of food and grocery shopping provision and the retail capacity figures suggest Swaffham has an over-provision of convenience good floorspace for the foreseeable future. The retail capacity figures suggest there is limited expenditure capacity in Watton to support new food store development for the foreseeable future. There is also limited capacity showing for the remaining district outside of the 5 main centres.

7.7 The figures above include population growth within Sustainable Urban Extensions. Local retail provision within SUEs in Thetford and Attleborough would need to be subtracted from the floorspace projections for these two towns shown in Tables 7.1 and 7.2.

Comparison Goods Retail

7.8 The comparison goods projections, suggest new floorspace could be distributed as shown in Tables 7.3 and 7.4. These figures include population growth within Sustainable Urban Extensions. Local retail provision within SUEs in Thetford and Attleborough would need to be subtracted from the floorspace projections for these two towns.

Table 7.3: Comparison Goods Retail Floorspace Projections (Net Sales)

Location	Additional Comparison Retail Floorspace (sq.m net)			
	2014 - 2021	2021 - 2026	2026 - 2036	Total 2014 - 2036
Thetford	52	1,749	3,593	**5,394**
Dereham	370	913	1,992	**3,275**
Swaffham	50	113	246	**409**
Watton	129	204	435	**768**
Attleborough	0	383	1,121	**1,504**
Other Breckland	5	20	45	**65**
Total	**606**	**3,382**	**7,432**	**11,415**

Source: Table 14, Appendix 3

Table 7.4: Comparison Goods Retail Floorspace Projections (Gross)

Location	Additional Comparison Retail Floorspace (sq.m gross)			
	2014 - 2021	**2021 - 2026**	**2026 - 2036**	**Total 2014 - 2036**
Thetford	70	2,331	4,792	**7,193**
Dereham	494	1,216	2,656	**4,366**
Swaffham	67	151	328	**546**
Watton	171	272	581	**1,024**
Attleborough	0	623	1,494	**2,117**
Other Breckland	6	28	59	**93**
Total	**808**	**4,621**	**9,910**	**15,339**

Source: Table 14, Appendix 3

7.9 Thetford and Dereham are the main comparison shopping centres in Breckland, and provide a reasonable range of comparison shops. The other smaller centres (Swaffham, Watton and Attleborough) have a more limited selection of comparison shops.

7.10 The economic projections in this section assume that new development will retain the district's share of comparison expenditure in the study area and will help to maintain this share in the future.

7.11 The district has a good selection of retail warehouse stores, mostly located in Thetford and Dereham. The bulky goods sector has been hit hard by the economic downturn and this is likely to continue in the short term. In the longer term there may be potential to improve this sector. Thetford and Dereham are the most likely locations for this form of retailing.

Food and Beverage/Non-retail Services

7.12 The Class A3/A5 food/drink and other non-retail services projections, suggest new floorspace could be distributed as shown in Table 7.5 below.

Table 7.5: Non-Retail Service Floorspace Projections (Gross)

Location	Additional Non-Retail Service Floorspace (sq.m gross)			
	2014 - 2021	**2021 - 2026**	**2026 - 2036**	**Total 2014 - 2036**
Thetford	519	530	1,074	**2,123**
Dereham	237	206	429	**872**
Swaffham	38	33	69	**140**
Watton	38	41	84	**163**
Attleborough	355	325	626	**1,306**
Other Breckland	149	113	218	**480**
Total	**1,336**	**1,248**	**2,500**	**5,084**

Source: Table 13 Appendix 4 and Table 5.3

7.13 Breckland town centre's proportion of restaurants/cafés (A3), pubs/bars (A4) and takeaways (A5) generally mirror the national average. The proportion of

Class A1 and Class A2 services is relatively high in Thetford, Watton and Attleborough. Dereham and Swaffham are above but closer to the national average. Given the relatively high provision of Class A1/A2 service uses in the district, development should provide around 5% of total new floorspace for these service uses.

Commercial Leisure

7.14 Breckland has a reasonable range of commercial leisure, entertainment and culture facilities. Residents in the study area also have access to facilities outside the district, including Bury St Edmunds and Cambridge, which may limit potential for further facilities.

7.15 Most of the key sectors are provided for e.g. cinemas, theatres, ten pin bowling, bingo, health clubs and nightclubs. The assessment suggests that existing level of facilities is sufficient to support the catchment population, but perhaps with emerging potential for further health clubs, restaurants and bars in line with population growth. The key conclusions are:

1 existing and proposed facilities are sufficient to meet the demand for cinemas, bingo halls and theatres;

2 population growth could generate demand for about two additional health and fitness clubs;

3 a further ten pin bowling facility is unlikely to be commercially viable, although Thetford has the best prospects for attracting an operator.

4 there is a potential requirement for an additional 3,715 sq.m gross of Class A3/A4/A5 floorspace in the district up to 2036.

Strategy Recommendations

Hierarchy of Centres

7.16 Emerging Local Plan policies should continue to seek to maintain and enhance the vitality and viability of the five main town centres in Breckland and maintain local shopping facilities within villages. The hierarchy of centres should continue to be clearly defined in the Local Plan.

7.17 The previous strategy identified Thetford as the key centre for development and change, and Dereham as the main town and administrative centre serving mid-Norfolk. The analysis within this report confirms that Thetford and Dereham should continue to be designated as the main town centres within the district.

7.18 The previous strategy identified Attleborough as a medium size town centre serving a wide rural catchment. Attleborough was identified as having potential for substantial growth, due in part to the proposed urban extension. Swaffham and Watton were also described as medium sized town centres serving local need. These three towns are generally at the same level within the hierarchy, and are similar in terms of:

1 range, scale and nature of retail and service facilities;

2 extent of rural catchment area and proportional retention of retail expenditure.

7.19 Service centre villages are expected to provide for basic or everyday local needs for their immediate rural catchment.

7.20 This approach to the hierarchy of centres remains appropriate and should be carried forward within the emerging Local Plan. The approach to the impact tests for each tier of centre is outlined below.

7.21 In addition to maintaining the hierarchy of centres, the Local Plan should continue to:

1 permitting appropriate retail and leisure proposals in order to meet the needs of residents and accommodate sustainable growth;

2 focus retail and leisure proposals within town centres (with retail uses focused within the Primary Shopping Areas;

3 restricting retail and leisure development outside the defined centres where it fails the sequential (except where it serves a local need) and/or impact tests. The retail and impact tests should reflect the NPPF;

4 define Primary and Secondary retail frontages within the main centres allow control over types of new development and change of uses at ground floor level to ensure that there is a healthy retail core and a vibrant mix of uses.

Thetford

7.22 The retail floorspace capacity projection is around 11,900 sq.m gross of additional Class A1 to A5 floorspace in Thetford up to 2036, over and above commitments (but not including potential facilities with outline permission within the SUE).

7.23 Local shopping facilities within the SUE could reduce the Thetford floorspace projection from 11,900 sq.m gross to 9,500 sq.m gross, a based on NLP's capacity assessment (2,400 sq.m gross of Class A1 to A5 within the SUE). The precise scale and mix of uses within the SUE will need to be access at the reserved matters application stage.

7.24 Vacant shop units can only accommodate a small element of the 11,900 sq.m gross floorspace projection (probably less than 8%). The priority should be the implementation of the commercial commitment at the former Anchor Hotel/Bridge Street car park site and to explore further the redevelopment of Riverside Walk and Tanner Street car park. These three sites could deliver around 3,500 sq.m gross and could accommodate most of the projected capacity for Class A1 to A5 up to 2026. As indicated above, local centres within the Thetford SUE could accommodate a further 2,400 sq.m gross.

7.25 In the longer term (after 2026) the potential to intensify commercial uses on the south site of Minstergate and the redevelopment of Carnegie Hall could be considered.

Dereham

7.26 The capacity projections suggest around 7,500 sq.m gross of Class A1 to A5 could be provided in Dereham by 2036, of which around 4,400 sq.m gross is for comparison goods floorspace. The reasonable proportion (perhaps 25%) of this projection could be accommodated in vacant premises. The short term priority up to 2021 should be the reoccupation of vacant shop units. In the medium term (2021 to 2026) development of Wrights Walk Phase 2 should be revisited. In the longer term (perhaps after 2026) the development of the TA Centre/car sales garage and land north of Georges Road should be considered.

Swaffham

7.27 In Swaffham there is an over-provision of convenience goods retail floorspace. The capacity projections suggest around 700 sq.m gross of other Class A1 to A5 could be required by 2036, which includes around 500 sq.m gross comparison retail floorspace. Vacant shop units could accommodate most of this projection. In the longer term (after 2026) redevelopment of the Post Office in Swaffham town centre could be considered.

Watton

7.28 The capacity projections suggest around 1,500 sq.m gross of other Class A1 to A5 could be required by 2036. Vacant shop units can only accommodate a small element of this floorspace projection (probably less than 20%). In the medium term (after 2021 to 2026) the development of the Memorial car park could be considered.

Attleborough

7.29 The capacity projections suggest around 5,100 sq.m gross of Class A1 to A5 could be provided in Attleborough by 2036. There is limited potential for vacant premised to accommodate this growth.

7.30 The priority should be to explore redevelopment of Griffin Lane/Exchange Street and/or the Esso Garage. These sites could deliver around 1,500 sq.m gross. Local centres within the Attleborough SUE could accommodate at least 1,900 sq.m gross of Class A1 to A5, which would reduce the overall Attleborough projection from 5,100 sq.m gross to 3,200 sq.m gross.

Service Centre Villages

7.31 New local centres to serve sustainable urban extensions are addressed within the recommended strategies for Thetford and Attleborough. A small element of the projection floorspace figures for the five main towns could be provided within existing local centres/parades within the settlement urban areas, through the reoccupation of vacant units or small scale expansion.

7.32 The capacity projections suggest around 700 sq.m gross of Class A1 to A5 could be provided in villages within Breckland. This growth could again be accommodated via the reoccupation of vacant units or small scale expansion.

7.33 If development is potentially serves more than a local role then it should be the subject of the sequential and impact tests.

7.34 Policies could be considered to safeguard local shopping facilities, where the loss would have an adverse impact on residents' access to vital day to day facilities.

Impact Tests

7.35 The NPPF does not require development to be of an appropriate scale and nature in relation to the centre in which it is located. The NPPF states that, when assessing applications for retail, leisure and office development outside of town centres which are not in accordance with an up to date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set threshold. If there is no locally set threshold, the default threshold is 2,500 sq.m gross.

7.36 The CLG Practice Guidance states that where authorities decide not to set out specific floorspace thresholds in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sq.m gross. The Guidance acknowledges that it may occasionally be relevant to consider the impact of proposals below this floorspace threshold, for example if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or 'tip the balance' of a vulnerable centre.

7.37 If the NPPF threshold was adopted, then a single development proposal could exceed the entire short to medium term (2021 and 2026) floorspace projections for centres within the district without the need for a retail impact assessment. Proposals that significantly exceed the floorspace projections for each centre are likely to significantly reduce the turnover of existing floorspace and this impact should be carefully tested on a case by case basis.

7.38 The NPPF threshold of 2,500 sq.m gross is inappropriate as a blanket threshold within all towns in Breckland, as this scale of development would represent a significant proportion of the overall retail projections in the authority area. Development smaller than 2,500 sq.m gross could have a significant adverse impact on the smaller town centres. The projections suggest that in some centres less than 500 sq.m gross of comparison or convenience goods retail floorspace is required. A reduced threshold of 500 sq.m gross is recommended by NLP in Swaffham, Watton and Attleborough and villages.

7.39 In Thetford and Dereham the floorspace projections are generally higher and the centres are larger, capable of absorbing more trade diversion and impact. In these centres NLP recommends an impact threshold of 1,000 sq.m gross.

7.40 NLP suggests that the impact of edge-of-centre and out-of-centre retail and leisure proposals should be assessed having regard to the recommended floorspace thresholds above. The Council should include these local impact thresholds within the emerging Local Plan.

7.41 The NPPF (paragraph 26) indicates that the key considerations relating to main town centre uses is the impact on town centres in terms of:

1 impact on existing, committed and planned investment in centres; and

2 impact on town centre's vitality and viability, including local consumer choice and trade within the town centre and wider area.

7.42 More generally the NPPF (paragraph 14) suggests that the wider impacts (positive and negative) of all developments need to be considered. Development should be granted unless any adverse impacts would significantly and demonstrably outweigh the benefits of the proposals.

7.43 Local Plan policies should reflect this holistic approach. The town centre impacts outlined in NPPF paragraph 26 and above, are only one element of this overall balance between the benefits and impacts. Other material considerations and locally important impacts will also be relevant. In NLP's view it is not necessary to include or refer to these other considerations within retail and town centre policies, because these issues are more appropriately considered in other policies in the plan e.g. policies relating to the environment, countryside and conservation/heritage issues.

Town Centre Boundaries and Frontages

7.44 The 2010 retail study provided a review of adopted Core Strategy and Development Control Policies relating to Town Centre Inset Areas, Primary and Secondary Frontages and Primary Shopping Areas for Thetford, Dereham, Attleborough, Swaffham and Watton. These policies and designations were reviewed in line with new policy in PPS4.

7.45 The level of guidance now contained within the NPPF and supporting NPPG has reduced significantly when compared with PPS4. Consistent with PPS4, the NPPF suggests that in drawing development plans, local authorities should, in addition to defining the extent of town centres and primary shopping areas, define primary and secondary frontages within designated centres, and set policies that make clear which uses will be permitted in such locations. However the NPPF provides limited guidance on the approach policies should adopt. The NPPF glossary indicates that primary frontages are likely to include a high proportion of retail uses which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

7.46 The NPPF (paragraph 23) also suggests competitive town centres should be promoted that provide customer choice and a diverse retail offer reflecting the individuality of town centres. This implies the most appropriate approach is likely to vary from centre to centre.

7.47 Development plans should set clear policies that make clear which uses will be permitted in such locations. The Core Strategy and Development Control Policies are consistent with this guidance.

7.48 Annex 2 of the NPPF (previously in Annex B of PPS4) provides definitions of the different types of location, as follows:

Town Centre: area defined on the local authority's proposals map, including the primary shopping area and areas of predominantly occupied by main town centre uses within or adjacent to the primary shopping area.

Primary Shopping Area: defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are adjoining and closely related to the primary shopping frontage).

Primary and Secondary Frontage: primary frontages are likely to include a high proportion of retail uses, which may include food, drinks, clothing and household goods. Secondary frontages provide greater opportunities for a diversity of uses such as restaurants, cinemas and businesses.

7.49 These NPPF definitions have remained relatively unchanged from the definitions in PPS4.

7.50 The 2010 study concluded that Development Control Policy DC9 relating to primary and secondary shopping frontages and Policy CP7 relating to the Primary Shopping Area, were consistent with guidance in PPS4. Changes within the NPPF indicate that a change of approach is unnecessary.

7.51 Other recommendation set out in the 2010 Study are summarised below:

1. The south side of Riverside Walk could be designated as Secondary Frontage if the Council wish to re-establish retail and other town centre uses in this area.
2. The Primary Shopping Area in Thetford is generously drawn, extending beyond the area covered by primary and secondary frontages. This approach is appropriate if the Council is seeking to encourage retail development into new areas i.e. MInstergate, Bridge Street car park and Raymond Street.
3. The primary and secondary frontages in Dereham town centre appear to be appropriately drawn, but there may be potential to define retail uses on Norwich Street (east of the Commercial Road junction) as secondary frontage.
4. The Primary Shopping Area has been generously drawn in Dereham, extending beyond the area covered by primary and secondary frontages. This approach is appropriate if the Council is seeking to encourage retail

uses/development into new areas i.e. Wellington Road (south side), Georges Road (north side).

5 The primary and secondary frontages in Attleborough town centre appear to be appropriately drawn. However, commercial premises at the west end of Connaught Road could be included as secondary frontage, and the Lloyds pharmacist and M&Co store could be included within the primary frontage.

6 The primary and secondary frontages and town centre boundaries in Swaffham and Watton are appropriately drawn.

7.52 Changes in national policy and other changes identified in this report do not suggest a radical change to shopping frontage policy and designations is required.

Future Strategy Implementation and Monitoring

7.53 There are a number of broad areas of possible action the Council could pursue in order to maintain and enhance the role of shopping centres within the district, as follows:

- application of guidance within the NPPF, particularly relating to the sequential approach and impact tests for locally set thresholds in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres;
- maintaining the generally high quality environment within each centre; and
- bring forward development opportunities through the Local Plan process to improve the availability of modern premises suitable for new occupiers.

7.54 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development in the short – medium term up to 2026, with longer term forecast up to 2031 and 2036. Projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available, in particular longer-term projections up to 2031 and beyond should be treated with caution.

7.55 Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;

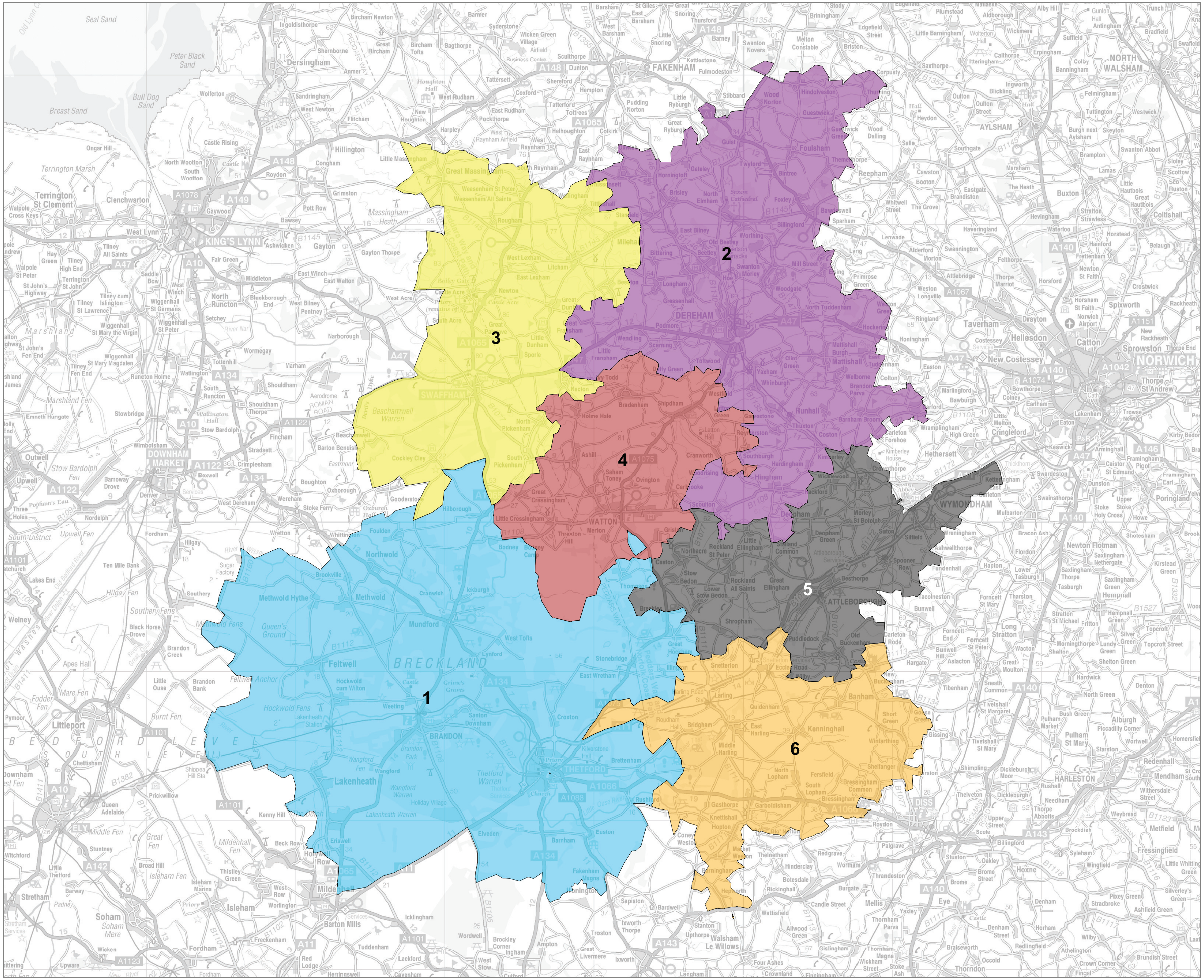
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian regularly provides projections for internet shopping and these projections will need to be updated at the same time as expenditure and population figures);
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

7.56 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections.

Appendix 1 Study Area and Glossary

Breckland Study Area Zones

Zone	Zone Name	Postal Sectors
1	Thetford	IP24 1, IP24 2, IP24 3, IP26 4, IP26 5, IP27 0, IP27 9
2	Dereham	NR19 1, NR19 2, NR20 3, NR20 4, NR20 5, NR9 4
3	Swaffham	PE32 2, PE37 7, PE37 8
4	Watton	IP25 6, IP25 7
5	Attleborough	NR17 1, NE17 2, NR18 9
6	South East Breckland	NR16 2, IP22 2



Key

Study Area Zone

1	Thetford
2	Dereham
3	Swaffham
4	Walton
5	Attleborough
6	South East Breckland

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Project	Breckland Retail Study Update
Title	Study Area Zones
Client	Breckland District Council
Date	23.06.2014
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Drg. No	GIS12299/04-01

N

GIS Reference: S:\CL12299 - Breckland Retail Study\CL12299-04 - Breckland Retail Study Update - Zones - 23.06.2014.mxd

GLOSSARY OF TERMS

Benchmark Turnover - The expected turnover of existing retail facilities based on sales floorspace data and expected average sales densities.

Class A1 - Commercial units classed as retail or shop uses within the Use Classes Order.

Class A1 Services - Non-retail uses classed as A1 within the Use Classes Order, such as hairdressers, travel agents and dry cleaners.

Class A2 - Commercial units classed as financial or professional services, for example banks and building societies, within the Use Classes Order.

Class A3/A4/A5 - Commercial units classed as food or drink outlets, for example pubs, restaurants and takeaways, within the Use Classes Order.

Convenience Goods - Consumer goods purchased on a regular basis, including food and groceries and cleaning materials.

Comparison Goods - Durable goods such as clothing, household goods, furniture, DIY and electrical goods.

Experian - A data consultancy who are widely used for retail planning information.

Goad Plans - Town centre plans prepared by Experian, which a based on occupier surveys of over 1,200 town centres across the country.

Gross floorspace - Total external floorspace including exterior walls.

Higher order comparison goods - Durable goods which tend to be high value, bought on an occasional basis and/or where customers are most likely to shop around and compare products in different shops e.g. adult fashion items, high value electrical goods, jewellery, furniture etc. Customers are usually prepared to tend to travel further to purchase these items.

Lower order comparison goods - Durable goods which tend to be lower value, bought on a regular basis and/or where customers are less likely to shop around e.g. small household goods, books, pharmaceutical and toiletries. Customers are less likely to travel long distances to purchase these items.

Market share /Penetration rate - The proportion of total consumer expenditure within a given area taken by a particular town centre or shopping facility.

Multiple traders - National or regional ‘chain store’ retailers.

Net floorspace - Retail floorspace devoted to the sale of goods, excluding storage and backstage space.

Special forms of trading (SFT) - Non-store retail activity (SFT) includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling.

Turnover efficiency - allowance for a retailer's ability to improve their turnover efficiency or sales density and the potential for existing floorspace to increase its productivity in the future. This may be achieved through spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio.

Appendix 2 Convenience Goods Assessment

Table 1: Study Area Population

Zone	2011	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,276	58,624	62,221	65,723	68,822	71,637
Zone 2 - Dereham	44,466	45,490	45,548	45,702	45,852	45,985	46,106
Zone 3 - Swaffham	16,610	16,993	17,014	17,072	17,128	17,178	17,223
Zone 4 -Watton	18,168	18,587	18,610	18,673	18,734	18,789	18,838
Zone 5 - Attleborough	21,203	21,691	22,591	24,988	27,323	29,389	31,265
Zone 6 - South East Breckland	11,742	12,012	12,028	12,068	12,108	12,143	12,175
Total	**168,175**	**172,049**	**174,415**	**180,725**	**186,869**	**192,306**	**197,244**

Sources: *Experian 2011 Census of Population and ONS 2012 Projections*

Table 2: Convenience Goods Expenditure per person (£)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	1,774	1,781	1,827	1,891	1,957	2,037
Zone 2 - Dereham	1,950	1,957	2,007	2,078	2,151	2,238
Zone 3 - Swaffham	1,926	1,933	1,982	2,052	2,124	2,211
Zone 4 -Watton	1,805	1,812	1,858	1,924	1,991	2,072
Zone 5 - Attleborough	1,929	1,937	1,986	2,056	2,129	2,215
Zone 6 - South East Breckland	2,143	2,151	2,206	2,283	2,364	2,460

Sources: *Experian Local Expenditure 2012 (2012 prices)*
Growth Rates: -0.6% 2012-2013, -0.3% 2013-2014, 0.1% 2014-2015 and 0.8% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	101.62	104.41	113.65	124.27	134.71	145.92
Zone 2 - Dereham	88.69	89.15	91.74	95.28	98.91	103.20
Zone 3 - Swaffham	32.72	32.89	33.84	35.15	36.49	38.07
Zone 4 -Watton	33.55	33.72	34.70	36.04	37.42	39.04
Zone 5 - Attleborough	41.85	43.75	49.64	56.19	62.56	69.26
Zone 6 - South East Breckland	25.74	25.87	26.62	27.65	28.70	29.95
Total	**324.18**	**329.79**	**350.20**	**374.58**	**398.80**	**425.44**

Source: Tables 1 and 2

Table 4: Base Year 2014 Convenience Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Sainsbury's, Thetford	16.8%	0.4%	0.5%	0.7%	2.0%	5.7%	10.0%
Tesco, Kilverstne, Thetford	23.0%	0.3%	0.0%	4.3%	6.7%	12.2%	10.0%
Other Thetford	24.0%	0.0%	0.1%	4.1%	1.3%	5.3%	10.0%
Thetford Sub-Total	**63.8%**	**0.7%**	**0.6%**	**9.1%**	**10.0%**	**23.2%**	
Morrison's, Dereham	0.1%	33.0%	4.3%	8.6%	3.0%	0.0%	5.0%
Tesco, Dereham	0.3%	30.8%	6.1%	12.8%	1.8%	0.0%	5.0%
Other Dereham	0.0%	17.6%	2.6%	6.3%	0.2%	0.0%	5.0%
Dereham Sub-Total	**0.4%**	**81.4%**	**13.0%**	**27.7%**	**5.0%**	**0.0%**	
Waitrose, Swaffham	0.3%	1.3%	14.9%	2.0%	0.0%	0.0%	15.0%
Tesco, Swaffham	0.3%	0.0%	27.4%	3.0%	0.5%	0.0%	15.0%
Other Swaffham	0.2%	0.3%	24.1%	2.6%	0.0%	0.0%	10.0%
Swaffham Sub-Total	**0.8%**	**1.6%**	**66.4%**	**7.6%**	**0.5%**	**0.0%**	
Tesco, Watton	1.4%	0.1%	0.0%	39.5%	2.2%	0.2%	2.0%
Other Watton	0.1%	0.0%	0.0%	9.5%	0.0%	0.0%	2.0%
Watton Sub-Total	**1.5%**	**0.1%**	**0.0%**	**49.0%**	**2.2%**	**0.2%**	
Sansbury's, Attleborough	0.1%	0.5%	0.0%	0.0%	43.5%	7.5%	5.0%
Other Attleborough	0.0%	0.0%	0.0%	0.2%	18.4%	5.2%	5.0%
Attleborough Sub-Total	**0.1%**	**0.5%**	**0.0%**	**0.2%**	**61.9%**	**12.7%**	
Local Shops in Breckland	0.2%	2.1%	1.1%	3.5%	1.7%	11.0%	2.0%
Breckland DC Total	**66.8%**	**86.4%**	**81.1%**	**97.1%**	**81.3%**	**47.1%**	
Outside Breckland DC	**33.2%**	**13.6%**	**18.9%**	**2.9%**	**18.7%**	**52.9%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey March 2014

Table 5: Base Year 2014 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2014	**101.62**	**88.69**	**32.72**	**33.55**	**41.85**	**25.74**		**324.18**
Sainsbury's, Thetford	17.07	0.35	0.16	0.23	0.84	1.47	2.24	22.37
Tesco, Kilverstne, Thetford	23.37	0.27	0.00	1.44	2.80	3.14	3.45	34.47
Other Thetford	24.39	0.00	0.03	1.38	0.54	1.36	3.08	30.78
Thetford Sub-Total	**64.83**	**0.62**	**0.20**	**3.05**	**4.19**	**5.97**	**8.76**	**87.62**
Morrison's, Dereham	0.10	29.27	1.41	2.89	1.26	0.00	1.84	36.76
Tesco, Dereham	0.30	27.32	2.00	4.29	0.75	0.00	1.82	36.49
Other Dereham	0.00	15.61	0.85	2.11	0.08	0.00	0.98	19.64
Dereham Sub-Total	**0.41**	**72.20**	**4.25**	**9.29**	**2.09**	**0.00**	**4.64**	**92.89**
Waitrose, Swaffham	0.30	1.15	4.88	0.67	0.00	0.00	1.24	8.24
Tesco, Swaffham	0.30	0.00	8.97	1.01	0.21	0.00	1.85	12.34
Other Swaffham	0.20	0.27	7.89	0.87	0.00	0.00	1.03	10.25
Swaffham Sub-Total	**0.81**	**1.42**	**21.73**	**2.55**	**0.21**	**0.00**	**4.11**	**30.83**
Tesco, Watton	1.42	0.09	0.00	13.25	0.92	0.05	0.32	16.06
Other Watton	0.10	0.00	0.00	3.19	0.00	0.00	0.07	3.36
Watton Sub-Total	**1.52**	**0.09**	**0.00**	**16.44**	**0.92**	**0.05**	**0.39**	**19.41**
Sansbury's, Attleborough	0.10	0.44	0.00	0.00	18.21	1.93	1.09	21.77
Other Attleborough	0.00	0.00	0.00	0.07	7.70	1.34	0.48	9.59
Attleborough Sub-Total	**0.10**	**0.44**	**0.00**	**0.07**	**25.91**	**3.27**	**1.57**	**31.36**
Local Shops in Breckland	0.20	1.86	0.36	1.17	0.71	2.83	0.15	7.29
Breckland DC Total	**67.88**	**76.63**	**26.54**	**32.58**	**34.03**	**12.12**	**19.62**	**269.40**
Outside Breckland DC	**33.74**	**12.06**	**6.18**	**0.97**	**7.83**	**13.62**	**n/a**	**74.40**
TOTAL	**101.62**	**88.69**	**32.72**	**33.55**	**41.85**	**25.74**	**n/a**	**343.80**

Source: Table 3 and 4

Table 6: Future Convenience Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	68.9%	0.8%	1.0%	10.9%	8.0%	24.0%	10.0%
Dereham	0.3%	80.9%	11.0%	26.6%	4.0%	0.0%	5.0%
Swaffham	1.0%	2.0%	70.0%	8.0%	0.5%	0.0%	15.0%
Watton	1.4%	0.1%	0.0%	46.7%	2.0%	0.2%	2.0%
Attleborough	0.1%	0.5%	0.0%	1.5%	67.0%	20.0%	10.0%
Local Shops in Breckland	0.2%	2.1%	1.1%	3.5%	1.7%	9.5%	2.0%
Breckland DC Total	**71.9%**	**86.4%**	**83.1%**	**97.2%**	**83.2%**	**53.7%**	
Outside Breckland DC	**28.1%**	**13.6%**	**16.9%**	**2.8%**	**16.8%**	**46.3%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey March 2014 with NLP adjustments to reflect commitments/proposals

Table 7: Future 2016 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2016	**104.41**	**89.15**	**32.89**	**33.72**	**43.75**	**25.87**		**329.79**
Thetford	71.94	0.71	0.33	3.68	3.50	6.21	9.60	95.96
Dereham	0.31	72.12	3.62	8.97	1.75	0.00	4.57	91.34
Swaffham	1.04	1.78	23.02	2.70	0.22	0.00	5.08	33.84
Watton	1.46	0.09	0.00	15.75	0.88	0.05	0.37	18.60
Attleborough	0.10	0.45	0.00	0.51	29.32	5.17	3.95	39.50
Local Shops in Breckland	0.21	1.87	0.36	1.18	0.74	2.46	0.14	6.96
Breckland DC Total	**75.07**	**77.02**	**27.33**	**32.78**	**36.40**	**13.89**	**23.70**	**286.20**
Outside Breckland DC	**29.34**	**12.12**	**5.56**	**0.94**	**7.35**	**11.98**	**n/a**	**67.29**
TOTAL	**104.41**	**89.15**	**32.89**	**33.72**	**43.75**	**25.87**	**n/a**	**353.49**

Source: Table 3 and 6

Table 8: Future 2021 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	**113.65**	**91.74**	**33.84**	**34.70**	**49.64**	**26.62**		**350.20**
Thetford	78.31	0.73	0.34	3.78	3.97	6.39	10.39	103.91
Dereham	0.34	74.22	3.72	9.23	1.99	0.00	4.71	94.21
Swaffham	1.14	1.83	23.69	2.78	0.25	0.00	5.24	34.93
Watton	1.59	0.09	0.00	16.21	0.99	0.05	0.39	19.32
Attleborough	0.11	0.46	0.00	0.52	33.26	5.32	4.41	44.08
Local Shops in Breckland	0.23	1.93	0.37	1.21	0.84	2.53	0.15	7.26
Breckland DC Total	**81.72**	**79.26**	**28.12**	**33.73**	**41.30**	**14.30**	**25.28**	**303.71**
Outside Breckland DC	**31.94**	**12.48**	**5.72**	**0.97**	**8.34**	**12.33**	**n/a**	**71.77**
TOTAL	**113.65**	**91.74**	**33.84**	**34.70**	**49.64**	**26.62**	**n/a**	**375.48**

Source: Table 3 and 6

Table 9: Future 2026 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	**124.27**	**95.28**	**35.15**	**36.04**	**56.19**	**27.65**		**374.58**
Thetford	85.63	0.76	0.35	3.93	4.49	6.64	11.31	113.11
Dereham	0.37	77.08	3.87	9.59	2.25	0.00	4.90	98.06
Swaffham	1.24	1.91	24.61	2.88	0.28	0.00	5.46	36.37
Watton	1.74	0.10	0.00	16.83	1.12	0.06	0.41	20.25
Attleborough	0.12	0.48	0.00	0.54	37.64	5.53	4.92	49.24
Local Shops in Breckland	0.25	2.00	0.39	1.26	0.96	2.63	0.15	7.63
Breckland DC Total	**89.35**	**82.32**	**29.21**	**35.03**	**46.75**	**14.85**	**27.15**	**324.66**
Outside Breckland DC	**34.92**	**12.96**	**5.94**	**1.01**	**9.44**	**12.80**	**n/a**	**77.07**
TOTAL	**124.27**	**95.28**	**35.15**	**36.04**	**56.19**	**27.65**	**n/a**	**401.73**

Source: Table 3 and 6

Table 10: Future 2031 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	**134.71**	**98.91**	**36.49**	**37.42**	**62.56**	**28.70**		**398.80**
Thetford	92.82	0.79	0.36	4.08	5.00	6.89	12.22	122.16
Dereham	0.40	80.02	4.01	9.95	2.50	0.00	5.10	101.99
Swaffham	1.35	1.98	25.54	2.99	0.31	0.00	5.68	37.85
Watton	1.89	0.10	0.00	17.47	1.25	0.06	0.42	21.19
Attleborough	0.13	0.49	0.00	0.56	41.91	5.74	5.43	54.27
Local Shops in Breckland	0.27	2.08	0.40	1.31	1.06	2.73	0.16	8.01
Breckland DC Total	**96.86**	**85.46**	**30.32**	**36.37**	**52.05**	**15.41**	**29.01**	**345.48**
Outside Breckland DC	**37.85**	**13.45**	**6.17**	**1.05**	**10.51**	**13.29**	**n/a**	**82.32**
TOTAL	**134.71**	**98.91**	**36.49**	**37.42**	**62.56**	**28.70**	**n/a**	**427.80**

Source: Table 3 and 6

Table 11: Future 2036 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	**145.92**	**103.20**	**38.07**	**39.04**	**69.26**	**29.95**		**425.44**
Thetford	100.54	0.83	0.38	4.26	5.54	7.19	13.19	131.92
Dereham	0.44	83.49	4.19	10.38	2.77	0.00	5.33	106.60
Swaffham	1.46	2.06	26.65	3.12	0.35	0.00	5.94	39.58
Watton	2.04	0.10	0.00	18.23	1.39	0.06	0.45	22.27
Attleborough	0.15	0.52	0.00	0.59	46.40	5.99	5.96	59.60
Local Shops in Breckland	0.29	2.17	0.42	1.37	1.18	2.85	0.17	8.44
Breckland DC Total	**104.92**	**89.17**	**31.64**	**37.95**	**57.62**	**16.08**	**31.03**	**368.41**
Outside Breckland DC	**41.00**	**14.04**	**6.43**	**1.09**	**11.64**	**13.87**	**n/a**	**88.07**
TOTAL	**145.92**	**103.20**	**38.07**	**39.04**	**69.26**	**29.95**	**n/a**	**456.48**

Source: Table 3 and 6

Table 12: Base Year Convenience Goods Floorspace and Benchmark Turnover

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover Density (£ per sq.m)	Total Turnover (£m)
Zone 1	Aldi, Thetford	778	85%	661	£8,116	£5.37
Thetford	Iceland, Thetford	402	98%	394	£7,295	£2.87
	Sainsbury, Thetford	3,779	55%	2,078	£13,619	£28.31
	Farm Foods, Thetford	303	100%	303	£1,000	£0.30
	Tesco Express, Thetford	131	98%	128	£11,080	£1.42
	Tesco, Kilverstone Lane, Thetford	4,260	65%	2,769	£11,080	£30.68
	Lidl, Thetford (under construction)	1,286	80%	1,029	£3,138	£3.23
	Other town centre	596	98%	584	£5,000	£2.92
	Sub-Total	**11,535**		**7,947**		**£75.10**
Zone 2	Co-op, Market Place, Dereham	232	98%	227	£7,661	£1.74
Dereham	Iceland, East Dereham	555	98%	544	£7,295	£3.97
	Morrisons, East Dereham	3,512	85%	2,985	£12,649	£37.76
	Roys of Wroxham (conv. only)	250	100%	250	£5,000	£1.25
	Tesco, Dereham	4,948	60%	2,969	£11,080	£32.89
	Co-op, Old Swaffham Road, Dereham	232	98%	227	£7,661	£1.74
	Co-op, Shipdham Road, Dereham	277	98%	271	£7,661	£2.08
	Lidl, Dereham (extended)	1,045	80%	836	£3,138	£2.62
	Other town centre	352	100%	352	£5,000	£1.76
	Sub-Total	**11,403**		**8,662**		**£85.82**
Zone 3	Co-op (Rainbow), Swaffham	479	95%	455	£7,661	£3.49
Swaffham	Asda, Swaffham	1,052	90%	947	£13,418	£12.70
	Iceland, Swaffham	555	98%	544	£7,295	£3.97
	Other town centre	816	100%	816	£5,000	£4.08
	Waitrose, Swaffham	1,989	85%	1,691	£11,685	£19.76
	Tesco, Swaffham	1,970	80%	1,576	£11,080	£17.46
	Sub-Total	**6,861**		**6,028**		**£61.46**
Zone 4	Co-op, Watton	438	95%	416	£7,661	£3.19
Watton	Tesco, Watton	1,500	75%	1,125	£11,080	£12.47
	Other town centre	749	100%	749	£5,000	£3.75
	Sub-Total	**2,687**		**2,290**		**£19.40**
Zone 5	Lidl, Attleborough (as extended)	1,220	80%	976	£3,138	£3.06
Attleborough	Sainsbury, Attleborough	1,433	90%	1,290	£13,619	£17.56
	Other town centre	469	100%	469	£5,000	£2.35
	Sub-Total	**3,122**		**2,735**		**£22.97**
Breckalnd DC Total		**35,608**		**27,662**	**£9,571**	**£264.75**

Table 13: Summary of Convenience Goods Expenditure 2014 to 2036

Centre	2014	2016	2021	2026	2031	2036
Available Expenditure in Breckland (£m)						
Thetford	87.62	95.96	103.91	113.11	122.16	131.92
Dereham	92.89	91.34	94.21	98.06	101.99	106.60
Swaffham	30.83	33.84	34.93	36.37	37.85	39.58
Watton	19.41	18.60	19.32	20.25	21.19	22.27
Attleborough	31.36	39.50	44.08	49.24	54.27	59.60
Other Breckland	7.29	6.96	7.26	7.63	8.01	8.44
Total	**269.40**	**286.20**	**303.71**	**324.66**	**345.48**	**368.41**
Turnover of Existing Facilities (£m)						
Thetford (1)	75.10	108.61	108.61	108.61	108.61	108.61
Dereham	85.82	85.82	85.82	85.82	85.82	85.82
Swaffham	61.46	61.46	61.46	61.46	61.46	61.46
Watton	19.40	19.40	19.40	19.40	19.40	19.40
Attleborough (2)	22.97	44.26	44.26	44.26	44.26	44.26
Other Breckland	7.29	7.29	7.29	7.29	7.29	7.29
Total	**272.03**	**326.83**	**326.83**	**326.83**	**326.83**	**326.83**
Surplus/Deficit Expenditure (£m)						
Thetford	12.52	-12.65	-4.70	4.50	13.55	23.31
Dereham	7.07	5.52	8.39	12.24	16.18	20.78
Swaffham	-30.63	-27.61	-26.53	-25.08	-23.60	-21.87
Watton	0.02	-0.80	-0.08	0.85	1.79	2.87
Attleborough	8.38	-4.77	-0.18	4.98	10.01	15.34
Other Breckland	0.00	-0.32	-0.03	0.34	0.72	1.15
Total	**-2.64**	**-40.64**	**-23.13**	**-2.17**	**18.65**	**41.57**

Source: Tables 5 to 10

(1) food store at Thetford Enterprise Park (2,578 sq.m net - £33.51 million) added at 2016
(2) food store at Banham Poultry site (1,638 sq.m net - £21.29 million) added at 2016

Table 14: Convenience Goods Floorspace Expenditure Capacity 2016 to 2036

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Thetford	-973	-362	346	1,042	1,793
Dereham	425	645	941	1,244	1,599
Swaffham	-2,124	-2,041	-1,929	-1,816	-1,683
Watton	-62	-6	66	138	221
Attleborough	-367	-14	383	770	1,180
Other Breckland	-25	-2	26	55	88
Total	**-3,126**	**-1,779**	**-167**	**1,434**	**3,198**
Floorspace Requirement (sq.m gross)					
Thetford	-1,390	-517	494	1,489	2,561
Dereham	606	922	1,345	1,778	2,284
Swaffham	-3,034	-2,915	-2,756	-2,594	-2,404
Watton	-88	-8	94	197	315
Attleborough	-524	-20	547	1,100	1,685
Other Breckland	-36	-3	38	79	126
Total	**-4,466**	**-2,542**	**-239**	**2,049**	**4,568**

Source: Table 13

Table 15: Convenience Goods Floorspace Capacity 2016 to 2036 - constant market shares and excl. unimplmented commitments

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£13,000	£13,000	£13,000	£13,000	£13,000
Floorspace Requirement (sq.m net)					
Thetford	1,136	1,715	2,383	3,041	3,750
Dereham	588	817	1,125	1,438	1,805
Swaffham	-2,295	-2,217	-2,114	-2,008	-1,884
Watton	14	73	149	226	314
Attleborough	742	1,047	1,388	1,721	2,072
Other Breckland	5	29	59	89	123
Total	**191**	**1,464**	**2,990**	**4,507**	**6,180**
Floorspace Requirement (sq.m gross)					
Thetford	1,622	2,449	3,405	4,345	5,358
Dereham	840	1,168	1,606	2,055	2,578
Swaffham	-3,278	-3,168	-3,020	-2,869	-2,692
Watton	21	105	213	323	448
Attleborough	1,060	1,495	1,983	2,458	2,960
Other Breckland	8	42	84	127	176
Total	**272**	**2,091**	**4,271**	**6,439**	**8,829**

Appendix 3 Comparison Goods Assessment

Table 1: Study Area Population

Zone	2011	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,276	58,624	62,221	65,723	68,822	71,637
Zone 2 - Dereham	44,466	45,490	45,548	45,702	45,852	45,985	46,106
Zone 3 - Swaffham	16,610	16,993	17,014	17,072	17,128	17,178	17,223
Zone 4 -Watton	18,168	18,587	18,610	18,673	18,734	18,789	18,838
Zone 5 - Attleborough	21,203	21,691	22,591	24,988	27,323	29,389	31,265
Zone 6 - South East Breckland	11,742	12,012	12,028	12,068	12,108	12,143	12,175
Total	**168,175**	**172,049**	**174,415**	**180,725**	**186,869**	**192,306**	**197,244**

Sources: *Experian 2011 Census of Population and ONS 2012 Projections*

Table 2: Comparison Goods Expenditure per person (£)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	2,491	2,593	2,899	3,336	3,844	4,435
Zone 2 - Dereham	2,808	2,924	3,268	3,761	4,334	5,000
Zone 3 - Swaffham	2,572	2,678	2,993	3,445	3,970	4,580
Zone 4 -Watton	2,429	2,529	2,827	3,254	3,749	4,325
Zone 5 - Attleborough	2,865	2,983	3,334	3,838	4,422	5,101
Zone 6 - South East Breckland	3,106	3,233	3,615	4,160	4,794	5,530

Sources: *Experian Local Expenditure 2012 (2012 prices)*
Growth Rates: 3.2% 2012-2013, 2.3% 2013-2014, 2.8% 2014-2015 and 2.9% p.a. from 2015
Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	142.67	152.02	180.37	219.27	264.58	317.71
Zone 2 - Dereham	127.75	133.16	149.36	172.46	199.30	230.53
Zone 3 - Swaffham	43.71	45.56	51.10	59.01	68.19	78.87
Zone 4 -Watton	45.15	47.07	52.79	60.96	70.44	81.48
Zone 5 - Attleborough	62.15	67.38	83.32	104.85	129.96	159.50
Zone 6 - South East Breckland	37.31	38.89	43.62	50.37	58.21	67.33
Total	**458.73**	**484.08**	**560.56**	**666.92**	**790.68**	**935.42**

Source: Tables 1 and 2

Table 4: Base Year 2014 Comparison Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	41.3%	0.1%	0.9%	3.4%	12.1%	12.4%	5.0%
Dereham	0.6%	46.8%	17.4%	26.6%	3.9%	0.0%	5.0%
Swaffham	0.4%	0.7%	17.4%	2.6%	0.0%	0.0%	5.0%
Watton	1.3%	0.3%	0.6%	24.6%	2.0%	0.2%	2.0%
Attleborough	0.2%	0.2%	0.0%	0.1%	17.0%	6.3%	5.0%
Other Breckland	0.1%	0.4%	0.3%	0.2%	0.2%	1.7%	2.0%
Breckland District Total	**43.9%**	**48.5%**	**36.6%**	**57.5%**	**35.2%**	**20.6%**	
Outside Breckland DC	**56.1%**	**51.5%**	**63.4%**	**42.5%**	**64.8%**	**79.4%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey July 2014

Table 5: Base Year 2014 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2014	**142.67**	**127.75**	**43.71**	**45.15**	**62.15**	**37.31**		**458.73**
Thetford	58.92	0.13	0.39	1.54	7.52	4.63	3.85	76.97
Dereham	0.86	59.79	7.60	12.01	2.42	0.00	4.35	87.03
Swaffham	0.57	0.89	7.60	1.17	0.00	0.00	0.54	10.78
Watton	1.85	0.38	0.26	11.11	1.24	0.07	0.30	15.23
Attleborough	0.29	0.26	0.00	0.05	10.57	2.35	0.71	14.21
Other Breckland	0.14	0.51	0.13	0.09	0.12	0.63	0.03	1.67
Breckland District Total	**62.63**	**61.96**	**16.00**	**25.96**	**21.88**	**7.69**	**9.79**	**205.90**
Outside Breckland DC	**80.04**	**65.79**	**27.71**	**19.19**	**40.27**	**29.62**	**n/a**	**262.62**
TOTAL	**142.67**	**127.75**	**43.71**	**45.15**	**62.15**	**37.31**	**n/a**	**468.52**

Source: Tables 3 and 4

Table 6: Future Comparison Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	41.3%	0.1%	0.9%	3.4%	11.0%	12.3%	5.0%
Dereham	0.6%	46.8%	17.4%	26.6%	3.6%	0.0%	5.0%
Swaffham	0.4%	0.7%	17.4%	2.6%	0.0%	0.0%	5.0%
Watton	1.3%	0.3%	0.6%	24.6%	2.0%	0.2%	2.0%
Attleborough	0.2%	0.2%	0.0%	0.1%	23.0%	8.0%	5.0%
Other Breckland	0.1%	0.4%	0.3%	0.2%	0.2%	1.6%	2.0%
Breckland District Total	**43.9%**	**48.5%**	**36.6%**	**57.5%**	**39.8%**	**22.1%**	
Outside Breckland DC	**56.1%**	**51.5%**	**63.4%**	**42.5%**	**60.2%**	**77.9%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey July 2014 with NLP adjustments

Table 7: Future 2016 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2016	**152.02**	**133.16**	**45.56**	**47.07**	**67.38**	**38.89**		**484.08**
Thetford	62.79	0.13	0.41	1.60	7.41	4.78	4.06	81.18
Dereham	0.91	62.32	7.93	12.52	2.43	0.00	4.53	90.64
Swaffham	0.61	0.93	7.93	1.22	0.00	0.00	0.56	11.25
Watton	1.98	0.40	0.27	11.58	1.35	0.08	0.32	15.97
Attleborough	0.30	0.27	0.00	0.05	15.50	3.11	1.01	20.24
Other Breckland	0.15	0.53	0.14	0.09	0.13	0.62	0.03	1.71
Breckland District Total	**66.74**	**64.58**	**16.67**	**27.06**	**26.82**	**8.59**	**10.52**	**220.99**
Outside Breckland DC	**85.29**	**68.58**	**28.88**	**20.00**	**40.56**	**30.30**	**n/a**	**273.61**
TOTAL	**152.02**	**133.16**	**45.56**	**47.07**	**67.38**	**38.89**	**n/a**	**494.60**

Source: Tables 3 and 6

Table 8: Future 2021 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	**180.37**	**149.36**	**51.10**	**52.79**	**83.32**	**43.62**		**560.56**
Thetford	74.49	0.15	0.46	1.79	9.17	5.37	4.81	96.24
Dereham	1.08	69.90	8.89	14.04	3.00	0.00	5.10	102.02
Swaffham	0.72	1.05	8.89	1.37	0.00	0.00	0.63	12.66
Watton	2.34	0.45	0.31	12.99	1.67	0.09	0.36	18.20
Attleborough	0.36	0.30	0.00	0.05	19.16	3.49	1.23	24.60
Other Breckland	0.18	0.60	0.15	0.11	0.17	0.70	0.04	1.94
Breckland District Total	**79.18**	**72.44**	**18.70**	**30.35**	**33.16**	**9.64**	**12.18**	**255.66**
Outside Breckland DC	**101.19**	**76.92**	**32.40**	**22.44**	**50.16**	**33.98**	**n/a**	**317.08**
TOTAL	**180.37**	**149.36**	**51.10**	**52.79**	**83.32**	**43.62**	**n/a**	**572.74**

Source: Tables 3 and 6

Table 9: Future 2026 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	**219.27**	**172.46**	**59.01**	**60.96**	**104.85**	**50.37**		**666.92**
Thetford	90.56	0.17	0.53	2.07	11.53	6.20	5.85	116.91
Dereham	1.32	80.71	10.27	16.21	3.77	0.00	5.91	118.20
Swaffham	0.88	1.21	10.27	1.58	0.00	0.00	0.73	14.67
Watton	2.85	0.52	0.35	15.00	2.10	0.10	0.43	21.34
Attleborough	0.44	0.34	0.00	0.06	24.12	4.03	1.53	30.52
Other Breckland	0.22	0.69	0.18	0.12	0.21	0.81	0.05	2.27
Breckland District Total	**96.26**	**83.65**	**21.60**	**35.05**	**41.73**	**11.13**	**14.49**	**303.90**
Outside Breckland DC	**123.01**	**88.82**	**37.41**	**25.91**	**63.12**	**39.24**	**n/a**	**377.51**
TOTAL	**219.27**	**172.46**	**59.01**	**60.96**	**104.85**	**50.37**	**n/a**	**681.41**

Source: Tables 3 and 6

Table 10: Future 2031 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	**264.58**	**199.30**	**68.19**	**70.44**	**129.96**	**58.21**		**790.68**
Thetford	109.27	0.20	0.61	2.40	14.30	7.16	7.05	140.98
Dereham	1.59	93.27	11.86	18.74	4.68	0.00	6.85	136.99
Swaffham	1.06	1.40	11.86	1.83	0.00	0.00	0.85	17.00
Watton	3.44	0.60	0.41	17.33	2.60	0.12	0.50	24.99
Attleborough	0.53	0.40	0.00	0.07	29.89	4.66	1.87	37.42
Other Breckland	0.26	0.80	0.20	0.14	0.26	0.93	0.05	2.65
Breckland District Total	**116.15**	**96.66**	**24.96**	**40.51**	**51.72**	**12.86**	**17.17**	**360.03**
Outside Breckland DC	**148.43**	**102.64**	**43.23**	**29.94**	**78.23**	**45.34**	**n/a**	**447.82**
TOTAL	**264.58**	**199.30**	**68.19**	**70.44**	**129.96**	**58.21**	**n/a**	**807.85**

Source: Tables 3 and 6

Table 11: Future 2036 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	**317.71**	**230.53**	**78.87**	**81.48**	**159.50**	**67.33**		**935.42**
Thetford	131.22	0.23	0.71	2.77	17.54	8.28	8.46	169.21
Dereham	1.91	107.89	13.72	21.67	5.74	0.00	7.94	158.88
Swaffham	1.27	1.61	13.72	2.12	0.00	0.00	0.99	19.71
Watton	4.13	0.69	0.47	20.04	3.19	0.13	0.58	29.25
Attleborough	0.64	0.46	0.00	0.08	36.68	5.39	2.28	45.52
Other Breckland	0.32	0.92	0.24	0.16	0.32	1.08	0.06	3.10
Breckland District Total	**139.48**	**111.81**	**28.87**	**46.85**	**63.48**	**14.88**	**20.31**	**425.68**
Outside Breckland DC	**178.24**	**118.72**	**50.01**	**34.63**	**96.02**	**52.45**	**n/a**	**530.06**
TOTAL	**317.71**	**230.53**	**78.87**	**81.48**	**159.50**	**67.33**	**n/a**	**955.74**

Source: Tables 3 and 6

Table 12: Base Year Comparison Goods Floorspace

Zone	Store	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1	Thetford town centre	10,979	6,587
Thetford	Thetford Retail Park, Lime Kiln	1,500	1,275
	Forest Retail Park	6,900	5,865
	Other retail warehouses/garden centres	2,800	2,380
	Comparison sales in food stores	n/a	3,331
	Sub-Total	**22,179**	**19,438**
Zone 2	Dereham town centre	17,853	10,712
Dereham	Retail warehouses	10,900	9,265
	Comparison sales in food stores	n/a	2,741
	Sub-Total	**28,753**	**22,718**
Zone 3	Swaffham town centre	4,557	2,734
Swaffham	Comparison sales in food stores	n/a	833
	Sub-Total	**4,557**	**3,567**
Zone 4	Watton town centre	4,401	2,641
Watton	Comparison sales in food stores	n/a	397
	Sub-Total	**4,401**	**3,038**
Zone 5	Attleborough town centre	5,074	3,044
Attleborough	Comparison sales in food stores	n/a	387
	Sub-Total	**5,074**	**3,431**
Breckalnd DC Total		**64,964**	**52,192**

Source: ORC Storepoint 2014, VOA, Breckland Land Use Survey (2014) and NLP site survey 2014

Table 13: Summary of Comparison Goods Expenditure 2014 to 2036

Centre	2014	2016	2021	2026	2031	2036
Available Expenditure in LB Enfield (£m)						
Thetford	76.97	81.18	96.24	116.91	140.98	169.21
Dereham	87.03	90.64	102.02	118.20	136.99	158.88
Swaffham	10.78	11.25	12.66	14.67	17.00	19.71
Watton	15.23	15.97	18.20	21.34	24.99	29.25
Attleborough	14.21	20.24	24.60	30.52	37.42	45.52
Other Breckland	1.67	1.71	1.94	2.27	2.65	3.10
Breckland District Total	**205.90**	**220.99**	**255.66**	**303.90**	**360.03**	**425.68**
Turnover of Existing Facilities (£m)						
Thetford (1) (2) (3)	77.78	86.90	95.95	105.93	116.96	129.13
Dereham	87.03	90.55	99.97	110.38	121.87	134.55
Swaffham	10.78	11.22	12.39	13.68	15.10	16.67
Watton	15.23	15.85	17.49	19.32	21.33	23.54
Attleborough (4) (5)	14.21	22.70	25.06	27.67	30.55	33.73
Other Breckland	1.67	1.73	1.91	2.11	2.33	2.58
Breckland District Total	**206.71**	**228.95**	**252.77**	**279.08**	**308.13**	**340.20**
Surplus/Deficit Expenditure (£m)						
Thetford	n/a	-5.72	0.29	10.98	24.02	40.08
Dereham	n/a	0.09	2.04	7.82	15.13	24.33
Swaffham	n/a	0.04	0.28	0.99	1.90	3.04
Watton	n/a	0.13	0.71	2.03	3.67	5.70
Attleborough	n/a	-2.46	-0.46	2.85	6.87	11.80
Other Breckland	n/a	-0.03	0.03	0.15	0.32	0.52
Total	**n/a**	**-7.95**	**2.88**	**24.82**	**51.90**	**85.47**

Source: Tables 5 to 11

(1) Lidl store in Thetford (257 sq.m net - £0.81 million) added at 2014
(2) food store at Thetford Enterprise Park (859 sq.m net - £6.01 million) added at 2016
(3) infill site at Thetford Retail Park (859 sq.m net - £6.01 million) added at 2017
(4) food store at Banham Poultry site (702 sq.m net - £4.91 million) added at 2016
(5) bulky goods stores at Banham Poultry site (1,200 sq.m net - £3 million) added at 2016

Table 14: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,520	£6,095	£6,729	£7,430
Floorspace Requirement (sq.m net)					
Thetford	-1,144	52	1,801	3,570	5,394
Dereham	17	370	1,283	2,248	3,275
Swaffham	7	50	163	283	409
Watton	25	129	333	545	768
Attleborough	-492	-84	467	1,021	1,588
Other Breckland	-6	5	25	47	70
Total	**-1,591**	**522**	**4,072**	**7,713**	**11,504**
Floorspace Requirement (sq.m gross)					
Thetford	-1,525	70	2,401	4,760	7,193
Dereham	23	494	1,710	2,997	4,366
Swaffham	9	67	218	377	546
Watton	34	171	443	726	1,024
Attleborough	-655	-112	623	1,361	2,117
Other Breckland	-7	6	34	63	93
Total	**-2,121**	**696**	**5,429**	**10,284**	**15,339**

Source: Table 13

Appendix 4 Food and Beverage Assessment

Table 1: Study Area Population

Zone	2011	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,276	58,624	62,221	65,723	68,822	71,637
Zone 2 - Dereham	44,466	45,490	45,548	45,702	45,852	45,985	46,106
Zone 3 - Swaffham	16,610	16,993	17,014	17,072	17,128	17,178	17,223
Zone 4 -Watton	18,168	18,587	18,610	18,673	18,734	18,789	18,838
Zone 5 - Attleborough	21,203	21,691	22,591	24,988	27,323	29,389	31,265
Zone 6 - South East Breckland	11,742	12,012	12,028	12,068	12,108	12,143	12,175
Total	**168,175**	**172,049**	**174,415**	**180,725**	**186,869**	**192,306**	**197,244**

Sources: *Experian 2011 Census of Population and ONS 2012 Projections*

Table 2: Food and Bverage (FAB) Expenditure per person (£)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	820	843	904	969	1,039	1,113
Zone 2 - Dereham	906	932	999	1,070	1,148	1,230
Zone 3 - Swaffham	815	838	898	963	1,032	1,107
Zone 4 -Watton	793	815	874	937	1,004	1,077
Zone 5 - Attleborough	916	942	1,010	1,082	1,160	1,244
Zone 6 - South East Breckland	959	986	1,057	1,133	1,215	1,302

Sources:
Experian Local Expenditure 2012 (2012 prices)
Growth Rates: -0.2% 2012-2013, 0.7% 2013-2014, and 1.4% from 2014

Table 3: Total FAB Expenditure (£m)

Zone	2014	2016	2021	2026	2031	2036
Zone 1 - Thetford	46.97	49.43	56.24	63.68	71.48	79.76
Zone 2 - Dereham	41.21	42.43	45.64	49.08	52.77	56.72
Zone 3 - Swaffham	13.85	14.26	15.34	16.49	17.73	19.06
Zone 4 -Watton	14.74	15.17	16.32	17.55	18.87	20.28
Zone 5 - Attleborough	19.87	21.28	25.23	29.57	34.10	38.89
Zone 6 - South East Breckland	11.52	11.86	12.76	13.72	14.75	15.85
Total	**148.16**	**154.43**	**171.52**	**190.10**	**209.70**	**230.56**

Source: Tables 1 and 2

Table 4: Base Year 2014 FAB Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	40.4%	0.5%	0.0%	6.4%	0.7%	0.3%	5.0%
Dereham	0.2%	43.1%	11.5%	9.6%	0.7%	0.0%	5.0%
Swaffham	0.9%	0.2%	22.9%	0.6%	0.0%	0.0%	2.0%
Watton	0.6%	0.8%	0.0%	18.2%	0.0%	0.7%	2.0%
Attleborough	1.5%	2.2%	0.0%	0.7%	39.8%	12.6%	2.0%
Other Breckland	3.5%	5.3%	9.6%	11.1%	7.5%	12.0%	2.0%
Breckland District Total	**47.1%**	**52.1%**	**44.0%**	**46.6%**	**48.7%**	**25.6%**	
Outside Breckland DC	**52.9%**	**47.9%**	**56.0%**	**53.4%**	**51.3%**	**74.4%**	n/a
TOTAL	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	n/a

Source: NEMS Household Survey July 2014

Table 5: Base Year 2014 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2014	**46.97**	**41.21**	**13.85**	**14.74**	**19.87**	**11.52**		**148.16**
Thetford	18.97	0.21	0.00	0.94	0.14	0.03	1.07	21.37
Dereham	0.09	17.76	1.59	1.41	0.14	0.00	1.11	22.11
Swaffham	0.42	0.08	3.17	0.09	0.00	0.00	0.08	3.84
Watton	0.28	0.33	0.00	2.68	0.00	0.08	0.07	3.44
Attleborough	0.70	0.91	0.00	0.10	7.91	1.45	0.23	11.30
Other Breckland	1.64	2.18	1.33	1.64	1.49	1.38	0.20	9.86
Breckland District Total	**22.12**	**21.47**	**6.09**	**6.87**	**9.68**	**2.95**	**2.74**	**71.92**
Outside Breckland DC	**24.85**	**19.74**	**7.76**	**7.87**	**10.19**	**8.57**	**n/a**	**78.98**
TOTAL	**46.97**	**41.21**	**13.85**	**14.74**	**19.87**	**11.52**	**n/a**	**150.90**

Source: Tables 3 and 4

Table 6: Future 2016 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2016	**49.43**	**42.43**	**14.26**	**15.17**	**21.28**	**11.86**		**154.43**
Thetford	19.97	0.21	0.00	0.97	0.15	0.04	1.12	22.46
Dereham	0.10	18.29	1.64	1.46	0.15	0.00	1.14	22.77
Swaffham	0.44	0.08	3.26	0.09	0.00	0.00	0.08	3.97
Watton	0.30	0.34	0.00	2.76	0.00	0.08	0.07	3.55
Attleborough	0.74	0.93	0.00	0.11	8.47	1.49	0.24	11.98
Other Breckland	1.73	2.25	1.37	1.68	1.60	1.42	0.21	10.26
Breckland District Total	**23.28**	**22.11**	**6.27**	**7.07**	**10.36**	**3.04**	**2.86**	**74.99**
Outside Breckland DC	**26.15**	**20.32**	**7.98**	**8.10**	**10.91**	**8.82**	**n/a**	**82.30**
TOTAL	**49.43**	**42.43**	**14.26**	**15.17**	**21.28**	**11.86**	**n/a**	**157.28**

Source: Tables 3 and 4

Table 7: Future 2021 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	**56.24**	**45.64**	**15.34**	**16.32**	**25.23**	**12.76**		**171.52**
Thetford	22.72	0.23	0.00	1.04	0.18	0.04	1.27	25.48
Dereham	0.11	19.67	1.76	1.57	0.18	0.00	1.23	24.52
Swaffham	0.51	0.09	3.51	0.10	0.00	0.00	0.09	4.29
Watton	0.34	0.37	0.00	2.97	0.00	0.09	0.08	3.84
Attleborough	0.84	1.00	0.00	0.11	10.04	1.61	0.28	13.89
Other Breckland	1.97	2.42	1.47	1.81	1.89	1.53	0.23	11.32
Breckland District Total	**26.49**	**23.78**	**6.75**	**7.61**	**12.29**	**3.27**	**3.17**	**83.34**
Outside Breckland DC	**29.75**	**21.86**	**8.59**	**8.72**	**12.94**	**9.49**	**n/a**	**91.35**
TOTAL	**56.24**	**45.64**	**15.34**	**16.32**	**25.23**	**12.76**	**n/a**	**174.68**

Source: Tables 3 and 4

Table 8: Future 2026 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	**63.68**	**49.08**	**16.49**	**17.55**	**29.57**	**13.72**		**190.10**
Thetford	25.73	0.25	0.00	1.12	0.21	0.04	1.44	28.78
Dereham	0.13	21.16	1.90	1.69	0.21	0.00	1.32	26.39
Swaffham	0.57	0.10	3.78	0.11	0.00	0.00	0.09	4.65
Watton	0.38	0.39	0.00	3.19	0.00	0.10	0.08	4.15
Attleborough	0.96	1.08	0.00	0.12	11.77	1.73	0.32	15.98
Other Breckland	2.23	2.60	1.58	1.95	2.22	1.65	0.25	12.48
Breckland District Total	**29.99**	**25.57**	**7.26**	**8.18**	**14.40**	**3.51**	**3.50**	**92.42**
Outside Breckland DC	**33.69**	**23.51**	**9.24**	**9.37**	**15.17**	**10.21**	**n/a**	**101.19**
TOTAL	**63.68**	**49.08**	**16.49**	**17.55**	**29.57**	**13.72**	**n/a**	**193.61**

Source: Tables 3 and 4

Table 9: Future 2031 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	**71.48**	**52.77**	**17.73**	**18.87**	**34.10**	**14.75**		**209.70**
Thetford	28.88	0.26	0.00	1.21	0.24	0.04	1.61	32.24
Dereham	0.14	22.74	2.04	1.81	0.24	0.00	1.42	28.40
Swaffham	0.64	0.11	4.06	0.11	0.00	0.00	0.10	5.02
Watton	0.43	0.42	0.00	3.43	0.00	0.10	0.09	4.48
Attleborough	1.07	1.16	0.00	0.13	13.57	1.86	0.36	18.16
Other Breckland	2.50	2.80	1.70	2.09	2.56	1.77	0.27	13.70
Breckland District Total	**33.67**	**27.49**	**7.80**	**8.79**	**16.61**	**3.78**	**3.86**	**102.00**
Outside Breckland DC	**37.81**	**25.28**	**9.93**	**10.08**	**17.49**	**10.97**	**n/a**	**111.56**
TOTAL	**71.48**	**52.77**	**17.73**	**18.87**	**34.10**	**14.75**	**n/a**	**213.56**

Source: Tables 3 and 4

Table 10: Future 2036 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	**79.76**	**56.72**	**19.06**	**20.28**	**38.89**	**15.85**		**230.56**
Thetford	32.22	0.28	0.00	1.30	0.27	0.05	1.80	35.92
Dereham	0.16	24.45	2.19	1.95	0.27	0.00	1.53	30.54
Swaffham	0.72	0.11	4.36	0.12	0.00	0.00	0.11	5.43
Watton	0.48	0.45	0.00	3.69	0.00	0.11	0.10	4.83
Attleborough	1.20	1.25	0.00	0.14	15.48	2.00	0.41	20.47
Other Breckland	2.79	3.01	1.83	2.25	2.92	1.90	0.30	15.00
Breckland District Total	**37.57**	**29.55**	**8.39**	**9.45**	**18.94**	**4.06**	**4.24**	**112.19**
Outside Breckland DC	**42.19**	**27.17**	**10.67**	**10.83**	**19.95**	**11.79**	**n/a**	**122.61**
TOTAL	**79.76**	**56.72**	**19.06**	**20.28**	**38.89**	**15.85**	**n/a**	**234.80**

Source: Tables 3 and 4

Table 11: Town Centre Food and Drink Units/Floorspace 2014

Centre	Class A3	Class A4	Class A5	Total Units	Total Floorspace
Thetford town centre	18	2	10	30	1,800
Dereham town centre	23	8	10	41	2,300
Swaffham town centre	11	6	4	21	1,600
Watton town centre	5	1	6	12	700
Attleborough town centre	9	2	7	18	1,400
Breckland Centres Total	**66**	**19**	**37**	**122**	**7,800**

Source: Breckland Land Use Survey 2014

Table 12: Summary of FAB Expenditure 2014 to 2036

Centre	2014	2016	2021	2026	2031	2036
Available Expenditure in Breckland (£m)						
Thetford	21.37	22.46	25.48	28.78	32.24	35.92
Dereham	22.11	22.77	24.52	26.39	28.40	30.54
Swaffham	3.84	3.97	4.29	4.65	5.02	5.43
Watton	3.44	3.55	3.84	4.15	4.48	4.83
Attleborough	11.30	11.98	13.89	15.98	18.16	20.47
Other Breckland	9.86	10.26	11.32	12.48	13.70	15.00
Breckland District Total	**71.92**	**74.99**	**83.34**	**92.42**	**102.00**	**112.19**
Turnover of Existing Facilities (£m)						
Thetford	21.37	21.80	22.91	24.08	25.30	26.59
Dereham	22.11	22.55	23.70	24.91	26.18	27.52
Swaffham	3.84	3.92	4.12	4.33	4.55	4.78
Watton	3.44	3.51	3.69	3.88	4.08	4.29
Attleborough	11.30	11.53	12.12	12.73	13.38	14.07
Other Breckland	9.86	10.06	10.58	11.11	11.68	12.28
Breckland District Total	**71.92**	**73.37**	**77.11**	**81.05**	**85.18**	**89.52**
Surplus Expenditure (£m)						
Thetford	n/a	0.66	2.57	4.71	6.94	9.33
Dereham	n/a	0.22	0.81	1.48	2.21	3.02
Swaffham	n/a	0.05	0.17	0.32	0.47	0.64
Watton	n/a	0.04	0.15	0.27	0.40	0.55
Attleborough	n/a	0.46	1.77	3.24	4.78	6.40
Other Breckland	n/a	0.19	0.75	1.36	2.02	2.72
Total	**n/a**	**1.62**	**6.23**	**11.37**	**16.82**	**22.66**

Source: Tables 5 to 10

Table 13: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036

Centre	2016	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,000	£5,255	£5,523	£5,805	£6,101
Floorspace Requirement (sq.m gross)					
Thetford	133	490	852	1,196	1,529
Dereham	43	154	268	381	496
Swaffham	9	33	57	82	106
Watton	8	28	49	69	89
Attleborough	91	337	587	823	1,050
Other Breckland	39	142	246	347	446
Total	**323**	**1,185**	**2,059**	**2,897**	**3,715**

Source: Table 12

Appendix 5 Town Centre Audits

A. THETFORD

Thetford town centre is located to the south of the district, approximately 20km north of Bury St Edmunds. Thetford town centre is comparable in size to Dereham town centre, and these two centres are the largest shopping centres in Breckland. Thetford town has a larger urban population than Dereham. The town centre serves shoppers in the southern half of the district, including parts of Forest Heath District and St. Edmundsbury Borough.

Mix of Uses and Occupier Representation

The diversity of uses present in Thetford town centre on the basis of the number of units is shown in Table A.1 below. This is derived from Breckland Council's 2014 town centre floorspace data, and we have excluded units outside the designated town centre boundary including retail parks (e.g. Forest Retail Park) and also Lime Kiln Lane which is within the designated town centre boundary. The results are compared with land use information adopted within the 2010 study.

Table A.1 Thetford Town Centre Use Class Mix by Unit (Class A Uses Only)

Type of Unit	Units 2010	Units 2014	% of Total Number of Units	
			Thetford %	UK Average (1)
Comparison Retail	56	38	24.8	36.0
Convenience Retail	12	12	7.9	8.1
A1 Services (2)	17	27	17.6	14.1
A2 Services	28	28	18.3	12.1
A3/A5	21	28	18.3	14.7
A4 Pubs/bar	3	2	1.3	2.9
Vacant (3)	13	18	11.8	12.1
Total	**150**	**153**	**100.0**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

The centre has a much lower proportion of comparison goods retailers compared with the national average, and the number of comparison shops has fallen significantly since 2010. The decline in comparison shops has resulted in a small increase in the number of vacant units (13 to 18 vacant shops). However the reduction of comparison shops has been replaced by non-retail services e.g. Class A3/A5 uses and Class A1 beauty/hair related outlets.

The proportions of non-retail services (Class A1 service uses, A2 and A3/ A5 uses) are above the national average. The percentage of vacant units is similar to the national average.

In addition to the 153 Class A units, Thetford town centre has 2 Sui Generis outlets (pet grooming and an amusement arcade).

Retailer Representation

Thetford has retained a reasonable selection of comparison shops reflecting the centre's role as one of the main town centres in Breckland. Major national comparison retailers present in the centre include Argos, WH Smiths, M & Co, Boots the Chemist and Wilkinsons. Table A.2 provides a breakdown of comparison shop uses by goods categories.

Table A.2 Thetford Town Centre Breakdown of Comparison Units

Type of Unit	Thetford			% UK Average*
	Units 2010	Units 2014	%	
Clothing and footwear	12	6	15.8	25.0
Furniture, carpets and textiles	0	1	2.6	7.4
Booksellers, arts, crafts and stationers	5	3	7.9	10.6
Electrical, gas, music and photography	6	5	13.2	9.4
DIY, hardware and homewares	2	0	0	6.4
China, glass, gifts and fancy goods	3	1	2.6	4.6
Cars, motorcycles and motor accessories	2	1	2.6	1.3
Chemists, drug stores and opticians	7	8	21.1	10.0
Variety, department and catalogue	5	5	13.2	1.6
Florists, nurserymen and seedsmen	3	1	2.6	2.3
Toys, hobby, cycle and sport	1	0	0	5.2
Jewellers	2	1	2.6	5.0
Charity, second-hand shops	-	6	15.8	8.4
Other comparison retailers	8	0	0	2.9
Total	**57**	**38**	**100.0**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
*UK average for all town centres surveyed by Goad Plans (March, 2014)

Thetford has outlets within most of the Goad comparison goods categories but the choice of shops within each category is relatively limited, except for chemists/opticians and charity shops. The choice of clothing shops is poor when compared with the national average. Three categories have no representation i.e. DIY/hardware, toys/hobby/cycles/sport and other retailers.

In terms of convenience retailers, the centre contains Aldi, Iceland, Tesco Express and Farm Foods stores, together with a range of independent convenience retailers, in addition to the out-of-centre Tesco and Sainsbury stores.

Service Uses

Thetford has a good range of non-retail service uses, with all categories represented as shown in Table A.3. These sectors have grown significantly since 2010.

The number of Class A2 banks/financial/professional services has increased significantly since 2010, in particular employment agencies. The number of hairdressers/beauty parlours has also increased significantly, whilst the number of travel agents and estate agents has fallen.

Table A.3 Thetford Town Centre Analysis of Selected Service Uses

Type of Unit	Thetford			% UK Average*
	Units 2010	Units 2014	%	
Restaurants/cafés	21	18	22.8	23.3
Fast food/takeaways	-	10	12.7	15.2
Pubs/bars	3	2	2.5	7.6
Banks/other financial professional services	12	20	25.3	12.9
Betting shops/casinos	-	3	3.8	4.0
Estate agents/valuers	7	5	6.3	9.5
Travel agents	4	2	2.5	2.5
Hairdressers/beauty parlours	11	18	22.8	22.9
Laundries/dry cleaners	0	1	1.3	2.2
Sub- Total	**58**	**79**	**100.0**	**100.0**
Other A1 Services	-	6	-	-
Total	**69**	**85**	**-**	**-**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.

*UK average for all town centres surveyed by Goad Plans (March, 2014)

The centre also contains a number of non-retail/service uses, including hotels, a museum, an art gallery and bingo hall.

Vacant Units

There were 18 vacant units in Thetford town centre at the time of the land use survey in 2014. The vacancy rate (11.8%) is similar to the national average (12.1%), however the number of vacant units has increase since 2010 due to the effects of the economic downturn.

Summary of Thetford's Strengths and Weaknesses

Strengths

- Thetford is a historic market town with numerous listed and period buildings. It is the largest shopping and commercial centre in the southern half of Breckland. The household survey results indicate that 33% of residents normally use Thetford town centre for non-food shopping in the Thetford study area zone.
- The town centre also provides a range of non-retail service facilities including banks and building societies, restaurants and bars.
- The central shopping area is pedestrianised providing a traffic free shopping environment, and there is a natural circuit for pedestrians. There is good paving and street furniture throughout the centre.
- The centre has several public car parks which are distributed around the centre, within close proximity of the main shopping areas. Only 3.7% of survey respondents felt they would shop more often in Thetford Town Centre if more car parking was available.

Weaknesses

- The number of comparison goods shops has fallen significantly since 2014 and the centre has become more focused on day to day services rather than non-food shopping.
- The buildings on Riverside Walk (1960s/70s) are unattractive and detract from the overall attractiveness of the town centre.
- Although possessing a number of national retailers, 26% of respondents to the household survey claimed they would shop in Thetford more often if there was a greater number, type, range and/or quality of shops in the town centre.
- There is a limited supply of available retail units within the centre. Most vacant units are small premises in secondary shopping areas. There are a limited number of large modern retail units suitable for multiple retailers.
- The town centre has limited redevelopment potential in the core area, due to the historic character of the town centre and conservation area.

B. DEREHAM

Dereham town centre is located in the north east of the district, approximately 25km to the west of Norwich City Centre. Dereham town centre is comparable in size to Thetford, and these two centres are the largest shopping centres in Breckland. Dereham town has a smaller urban population but the centre serves shoppers from across the northern half of the district.

Mix of Uses and Occupier Representation

The diversity of uses present in Dereham town centre on the basis of the number of units is shown in Table B.1 below. This is derived from Breckland Council's 2014 town centre floorspace data, and we have excluded other out of centre units e.g. on Yaxham Road. The results are compared with land use information adopted within the 2010 study.

Table B.1 Dereham Town Centre Use Class Mix by Unit (Class A Uses Only)

Type of Unit	Units 2010	Units 2014	% of Total Number of Units	
			Dereham %	UK Average (1)
Comparison Retail	108	92	39.5	36.0
Convenience Retail	17	10	4.3	8.1
A1 Services (2)	28	34	14.6	14.1
A2 Services	31	30	12.8	12.1
A3/A5	24	33	14.2	14.7
A4 Pubs/bar	7	8	3.4	2.9
Vacant (3)	22	26	11.2	12.1
Total	**238**	**233**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

The centre has a slightly higher proportion of comparison goods retailers compared with the national average, but the number of comparison shops has fallen by 16 units since 2010. There has also been a notable decline in the number of convenience stores in the centre. The decline in comparison and convenience shops is explained by an increase in the number of service unis (A1, A3-A5) and small rise in the number of vacant shops. 5 units have also been lost from retail use altogether since 2010.

Whilst the number of non-retail services has increased since 2010 (apart from A2) the proportions of these uses is lower than the national average. The percentage of vacant units is slightly lower than the national average.

In addition to the 233 Class A units within Dereham town centre has two Sui Generis uses, i.e. tattooists/body piercing outlets.

Retailer Representation

Dereham has retained a reasonable selection of comparison shops reflecting the centre's role as one of the main town centres in Breckland. Major national comparison retailers present in the centre include Wilkinsons, Peacocks, New Look, M&Co, Edinburgh Woollen Mill, Phones 4U and Poundland. Table B.2 provides a breakdown of comparison shop uses by goods categories.

Table B.2 Dereham Town Centre Breakdown of Comparison Units

Type of Unit	Dereham			% UK Average*
	Units 2010	Units 2014	%	
Clothing and footwear	14	14	15.2	25.0
Furniture, carpets and textiles	13	4	4.3	7.4
Booksellers, arts, crafts and stationers	9	9	9.8	10.6
Electrical, gas, music and photography	17	9	9.8	9.4
DIY, hardware and homewares	12	8	8.7	6.4
China, glass, gifts and fancy goods	5	2	2.2	4.6
Cars, motorcycles and motor accessories	1	0	0	1.3
Chemists, drug stores and opticians	8	9	9.8	10.0
Variety, department and catalogue	4	2	2.2	1.6
Florists, nurserymen and seedsmen	2	4	4.3	2.3
Toys, hobby, cycle and sport	8	3	3.3	5.2
Jewellers	4	5	5.4	5.0
Charity, second-hand shops	-	13	14.1	8.4
Other comparison retailers	11	10	10.9	2.9
Total	**108**	**92**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
*UK average for all town centres surveyed by Goad Plans (March, 2014)

Dereham has outlets within most of the Goad comparison goods categories. The choice of clothing shops is poor when compared with the national average and the centre has a higher proportion of charity shops. In terms of convenience retailers, the centre contains Iceland, Co-op and an edge-of-centre Morrison's store, together with a range of independent convenience retailers, in addition to the out-of-centre Tesco and Lidl stores.

Service Uses

Dereham has a reasonable range of non-retail service uses, with all categories represented as shown in Table B.3. These sectors have grown significantly since 2010. The number of food and beverage units and hairdressers/beauty parlours has increased significantly since 2010.

Table B.3 Dereham Town Centre Analysis of Selected Service Uses

Type of Unit	Dereham			% UK Average*
	Units 2010	Units 2014	%	
Restaurants/cafés	24	23	22.6	23.3
Fast food/takeaways	-	10	9.8	15.2
Pubs/bars	7	8	7.8	7.6
Banks/other financial professional services	15	19	18.6	12.9
Betting shops/casinos	-	3	2.9	4.0
Estate agents/valuers	9	8	7.8	9.5
Travel agents	2	2	2.0	2.5
Hairdressers/beauty parlours	22	27	26.5	22.9
Laundries/dry cleaners	3	2	2.0	2.2
Sub- Total	**82**	**102**		**100.0**
Other A1 Services	-	3	n/a	n/a
Total	**90**	**105**	**n/a**	**n/a**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.

*UK average for all town centres surveyed by Goad Plans (March, 2014)

The centre also contains a number of non-retail/service uses, including a hotel, dental surgeries, cinema and bingo hall.

Vacant Units

There were 26 vacant units in Dereham town centre at the time of the land use survey in 2014. The vacancy rate (11.1%) is similar to the national average (12.1%), however the number of vacant units has increase since 2010 due to the effects of the economic downturn. The vacant units were spread throughout the centre so not to detract from its overall appearance.

Summary of Dereham's Strengths and Weaknesses

Strengths

- Dereham is the largest shopping centre in the north of Breckland. The household survey results indicate that Dereham is the most popular town within the district for residents for non-food shopping and 60% of people in the Dereham zone do most of the their non-food shopping in Dereham.
- All facilities are within walking distance with the retail units forming a compact centre.
- The centre is served by a number of public car parks which are free. These are distributed throughout the centre ensuring easy access by car.
- The town centre provides a good range of service facilities including banks and building societies, restaurants and bars and hairdressers/ beauty salons.
- The historic character of the town centre provides an attractive town centre destination.
- There is a good mix of national multiple retailers and smaller independent retailers offering a more unique offer.

Weaknesses

- Whilst the centre is compact, the centre can be difficult to navigate. There is no natural shopping circuit and the centre has a number of streets which lead to a dead end.
- Despite having a higher than average proportion of national multiple retailers, there is a low proportion of clothing and footwear stores, especially for a centre of this size. Household survey respondents (7%) suggested they would shop more often in Dereham if there was a better choice of shops.
- There is a shortage of large modern premises suitable for national multiple retailers although recent development is seeking to meet this constraint.

C. SWAFFHAM

Swaffham is a small market town in the north west of the district, primarily serving the day-to-day shopping and service needs of local residents.

Mix of Uses and Occupier Representation

The diversity of uses present in Swaffham town centre on the basis of the number of units is shown in Table C.1 below. This is derived from Breckland Council's 2014 town centre floorspace data, and we have excluded units outside the designated town centre boundary. The results are compared with land use information adopted within the 2010 study.

Table C.1 Swaffham Town Centre Use Class Mix by Unit (Class A Uses Only)

Type of Unit	Units 2010	Units 2014	% of Total Number of Units	
			Swaffham %	UK Average (1)
Comparison Retail	44	44	36.4	36.0
Convenience Retail	12	11	9.0	8.1
A1 Services (2)	9	13	10.7	14.1
A2 Services	20	19	15.7	12.1
A3/A5	14	15	12.4	14.7
A4 Pubs/bar	6	6	5.0	2.9
Vacant (3)	16	13	10.8	12.1
Total	**121**	**121**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

The number of retail units within Swaffham has remained the same since 2010, and this is reflected by a broadly consistent number of retail units across the main categories, as shown in Table C.1. In fact, the only notable change is a 4 unit increase in the number of A1 service units, and a 3 unit decline in the number of vacant units.

In terms of the proportion of units when assessed against the national average, the centre has a similar proportion of comparison and convenience goods retailers compared with the national average. The proportions of non-retail services (Class A1 service uses and A3/ A5 uses) is below the national average. The percentage of vacant units is also below the national average.

In addition to the 121 Class A units within Swaffham town centre, there are 4 Sui Generis uses e.g. tyres sales.

Retailer Representation

Swaffham has retained a reasonable selection of comparison shops reflecting the centre’s role as one of the main town centres in Breckland. Major national comparison retailers present in the centre are limited to Boots the Chemist and the Co-operative Pharmacy with most of the offer being provided by independent retailers. Table C.2 provides a breakdown of comparison shop uses by goods categories.

Table C.2 Swaffham Town Centre Breakdown of Comparison Units

Type of Unit	Swaffham			% UK Average*
	2010	2014	%	
Clothing and footwear	4	4	9.1	25.0
Furniture, carpets and textiles	4	4	9.1	7.4
Booksellers, arts, crafts and stationers	4	3	6.8	10.6
Electrical, gas, music and photography	4	4	9.1	9.4
DIY, hardware and homewares	4	4	9.1	6.4
China, glass, gifts and fancy goods	3	2	4.5	4.6
Cars, motorcycles and motor access	2	2	4.5	1.3
Chemists, drug stores and opticians	6	5	11.5	10.0
Variety, department and catalogue	1	2	4.5	1.6
Florists, nurserymen and seedsmen	1	1	2.3	2.3
Toys, hobby, cycle and sport	3	3	6.8	5.2
Jewellers	2	4	9.1	5.0
Charity, second-hand shops	-	4	9.1	8.4
Other comparison retailers	6	2	4.5	2.9
Total	**44**	**44**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
*UK average for all town centres surveyed by Goad Plans (March, 2014)

Swaffham has outlets within all of the Goad comparison goods categories but the choice of shops within most categories is relatively limited. The choice of clothing shops is poor when compared with the national average. In terms of convenience retailers, the centre contains Asda, Iceland and the Co-op, together with a range of independent convenience retailers. There is also a good provision of out of centre food stores serving Swaffham including Waitrose and Tesco just outside the centre.

Service Uses

Swaffham has a good range of non-retail service uses, with all categories represented as shown in Table C.3. Unlike other towns in the district there has been limited growth in these sectors since 2010.

Table C.3 Swaffham Town Centre Analysis of Selected Service Uses

Type of Unit	Swaffham			% UK Average*
	Units 2010	Units 2014	%	
Restaurants/cafés	14	11	22.0	23.3
Fast food/takeaways	-	4	8.0	15.2
Pubs/bars	6	6	12.0	7.6
Banks/other financial professional services	12	10	20.0	12.9
Betting shops/casinos	-	3	6.0	4.0
Estate agents/valuers	6	6	12.0	9.5
Travel agents	1	1	2.0	2.5
Hairdressers/beauty parlours	6	7	14.0	22.9
Laundries/dry cleaners	1	2	4.0	2.2
Sub- Total	**46**	**50**	**100**	**100.0**
Other A1 Services	3	3	n/a	n/a
Total	**49**	**53**	**n/a**	**n/a**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.

*UK average for all town centres surveyed by Goad Plans (March, 2014)

In addition to these service uses, Swaffham also contains a hotel, museum, social club and other non-retail services.

Vacant Units

There were 13 vacant units in Swaffham town centre at the time of the land use survey in 2014. The vacancy rate (10.8%) is similar to the national average (12.1%), and the number of vacant units has declined which is positive given the economic down turn.

Summary of Swaffham's Strengths and Weaknesses

Strengths

- There are attractive buildings throughout Swaffham, many of which are listed. This contributes to a high quality environment within the centre.
- The Market Place provides a central focus for the town centre ensuring an easy to navigate centre.
- There is a good selection of specialist independent shops and all of the comparison goods categories identified by Goad are represented within the centre.
- The vacancy rate is lower than the national average, and the number of vacant units has declined since 2010.

Weaknesses

- The centre has a limited number of larger retail units to accommodate national multiple retailers. Given the historic nature of the centre development opportunities to meet this demand are constrained.

- As expected for a lower order centre, the range of comparison shops is limited, especially clothing shops. 13% of respondents to the household survey claimed they would shop in Swaffham more often if there was a greater number, type, range and/or quality of shops in the town centre.

D. WATTON

Watton is a small town located centrally in the district. The centre lies on the A1075, 12 miles to the north of Thetford and 10 miles to the south of Dereham, which are the two largest centres within the district. The centre is anchored by a recently extended Tesco store and a smaller Co-op store. The centre primarily serves the day-to-day shopping and service needs of local residents.

Mix of Uses and Occupier Representation

The diversity of uses present in Watton town centre on the basis of the number of units is shown in Table D.1 below. This is derived from Breckland Council's 2014 town centre floorspace data, and we have excluded units outside the designated town centre boundary. The results are compared with land use information adopted within the 2010 study.

Table D.1 Watton Town Centre Use Class Mix by Unit (Class A uses Only)

Type of Unit	Units 2010	Units 2014	% of Total Number of Units	
			Watton %	UK Average [(1)]
Comparison Retail	35	29	30.5	36.0
Convenience Retail	11	11	11.6	8.1
A1 Services [(2)]	13	16	16.8	14.1
A2 Services	20	20	21.1	12.1
A3/A5	12	11	11.6	14.7
A4 Pubs/bar	2	1	1.0	2.9
Vacant [(3)]	7	7	7.4	12.1
Total	**100**	**95**	**100.0**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

The centre has a lower proportion of comparison goods retailers compared with the national average, and the number of comparison shops has fallen since 2010. The decline in comparison shops has resulted in a small increase in the number of A1 service units, however, there has been a loss of 5 retail units within the town centre. The other categories have remained broadly consistent.

The percentage of vacant units is lower than the national average.

In addition to Watton town centre's 95 Class A untis there are 3 Sui Generis uses i.e. motorcycle sales, amusement arcade and tattooist.

Retailer Representation

Watton has a limited selection of comparison shops, reflecting its role as a local service centre. The majority of retailers are independent providing specialist shopping provision.

Table D.2 provides a breakdown of comparison shop uses by goods categories.

Table D.2 Watton Town Centre Breakdown of Comparison Units

Type of Unit	Watton			% UK Average*
	Units 2010	Units 2014	%	
Clothing and footwear	5	2	6.7	25.0
Furniture, carpets and textiles	4	2	6.7	7.4
Booksellers, arts, crafts and stationers	3	1	3.3	10.6
Electrical, gas, music and photography	5	5	16.7	9.4
DIY, hardware and homewares	4	3	10.0	6.4
China, glass, gifts and fancy goods	2	0	0	4.6
Cars, motorcycles and motor accessories	0	0	0	1.3
Chemists, drug stores and opticians	2	4	13.2	10.0
Variety, department and catalogue	0	0	0	1.6
Florists, nurserymen and seedsmen	2	2	6.7	2.3
Toys, hobby, cycle and sport	0	0	0	5.2
Jewellers	2	2	6.7	5.0
Charity, second-hand shops	-	6	20.0	8.4
Other comparison retailers	6	3	10.0	2.9
Total	**35**	**30**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
*UK average for all town centres surveyed by Goad Plans (March, 2014)

Watton has outlets in only some of the Goad comparison goods categories and the choice of shops is relatively limited. The choice of clothing shops is poor when compared with the national average. Three categories have no representation i.e. china/gifts, variety/department and toys/hobby/cycles/sport. In terms of convenience retailers, the centre contains a Tesco and a Co-op suitable for main and top up food shopping.

Service Uses

Watton has a reasonable range of non-retail service uses, with all categories represented as shown in Table D.3 excluding travel agents. These sectors have grown slightly since 2010. Restaurants/cafés are significantly below the average and there is a higher proportion of estate agents.

Table D.3 Watton Town Centre Analysis of Selected Service Uses

Type of Unit	Watton			% UK Average*
	Units 2010	Units 2014	%	
Restaurants/cafés	12	5	11.6	23.3
Fast food/takeaways	-	6	14.0	15.2
Pubs/bars	2	1	2.3	7.6
Banks/other financial professional services	10	11	25.6	12.9
Betting shops/casinos	-	2	4.7	4.0
Estate agents/valuers	7	7	16.2	9.5
Travel agents	0	0	0	2.5
Hairdressers/beauty parlours	9	10	23.3	22.9
Laundries/dry cleaners	1	1	2.3	2.2
Sub- Total	**41**	**43**	**100**	**100.0**
Other A1 Services	6	5	n/a	n/a
Total	**47**	**48**	**n/a**	**n/a**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.

*UK average for all town centres surveyed by Goad Plans (March, 2014)

In addition to these service uses, Watton also contains a hotel, dental surgery, veterinary surgery and an auction centre.

Vacant Units

There were 7 vacant units in Watton town centre at the time of the land use survey in 2014. This is the same number as in 2010. The vacancy rate (7.4%) is much lower than the national average (12.1%) which is a sign of a healthy centre.

Summary of Watton's Strengths and Weaknesses

Strengths

- The centre serves the day to day shopping and service needs of local residents, reflected by a higher than average convenience and A1/A2 service unit provision.
- The centre has an attractive historic environment with many period buildings providing a pleasant shopping environment.
- The centre has an interesting selection of independent specialist retailers serving a niche retailer offer.
- Watton has a low vacancy rate which suggests demand for premises is relatively strong, and the number of vacant units in the centre has remained unchanged since the 2010 Study.
- The High Street is easy to navigate with its linear form.

Weaknesses

- There are limited large format units and the historic environment may limited the potential for redevelopment opportunities to meet this need.

- As expected for a lower order centre, the range and choice of shops is relatively limited, and not all of the comparison retailer categories are represented in the centre. 12% of respondents to the household survey claimed they would shop in Watton more often if there was a greater number, type, range and/or quality of shops in the town centre.
- The main High Street is separated from the Tesco store which does not easily provide linked trips.
- Traffic along the High Street can act as a barrier to pedestrian movement.

E. ATTLEBOROUGH

Attleborough town centre is located to the south east of the district. It lies on the A11 about 15 miles to the south west of Norwich and 14 miles north eats of Thetford. The centre is anchored by Sainsbury's and Lidl food stores. The centre primarily serves the day-to-day shopping and service needs of local residents.

Mix of Uses and Occupier Representation

The diversity of uses present in Attleborough town centre on the basis of the number of units is shown in Table E.1 below. This is derived from Breckland Council's 2014 town centre floorspace data, and we have excluded units outside the Council's designated town centre boundary. The results are compared with land use information adopted within the 2010 study.

Table E.1 Attleborough Town Centre Use Class Mix by Unit (Class A Uses Only)

Type of Unit	Units 2010	Units 2014	% of Total Number of Units	
			Attleborough %	UK Average (1)
Comparison Retail	33	31	29.8	36.0
Convenience Retail	13	12	11.5	8.1
A1 Services (2)	16	14	13.5	14.1
A2 Services	22	21	20.2	12.1
A3/A5	14	19	18.3	14.7
A4 Pubs/bar	2	4	3.8	2.9
Vacant (3)	3	3	2.9	12.1
Total	**103**	**104**	**100.0**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
(1) UK average for all town centres surveyed by Goad Plans (March 2014)
(2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience good

The centre has a lower proportion of comparison goods retailers compared with the national average, and the number of comparison shops has fallen by two units since 2010. The decline in comparison shops has resulted in an increase in the number of Class A2/A3/A4/A5 units. The remaining uses have remained broadly similar since 2010.

Whilst there has been limited change to the number of units, we note the centre has a higher than average proportion of Class A2 and A3-A5 service units. There is also a higher proportion of convenience units reflecting the local service role the centre plays in the retail hierarchy. The percentage of vacant units is significantly lower than the national average and the number has not increased since 2010.

In addition to Attleborough town centre's 104 Class A units there are 4 Sui Generis uses i.e. pet grooming, launderette and petrol filling stations.

Retailer Representation

Attleborough has a limited selection of comparison shops reflecting the centre's role as one of the smaller centres in Breckland. The centre generally comprises independent retailers to provide specialist shopping facilities. Table E.2 provides a breakdown of comparison shop uses by goods categories.

Table E.2 Attleborough Town Centre Breakdown of Comparison Units

Type of Unit	Attleborough			% UK Average*
	Units 2010	Units 2014	%	
Clothing and footwear	2	1	3.2	25.0
Furniture, carpets and textiles	3	1	3.2	7.4
Booksellers, arts, crafts and stationers	3	1	3.2	10.6
Electrical, gas, music and photography	5	5	16.1	9.4
DIY, hardware and homewares	2	3	9.7	6.4
China, glass, gifts and fancy goods	2	2	6.5	4.6
Cars, motorcycles and motor accessories	0	0	0	1.3
Chemists, drug stores and opticians	4	5	16.1	10.0
Variety, department and catalogue	2	2	6.5	1.6
Florists, nurserymen and seedsmen	1	2	6.5	2.3
Toys, hobby, cycle and sport	4	2	6.5	5.2
Jewellers	0	1	3.2	5.0
Charity, second-hand shops	-	5	16.1	8.4
Other comparison retailers	5	1	3.2	2.9
Total	**33**	**31**	**100**	**100.0**

Source: 2010 Retail Study, Breckland Land Use Survey 2014.
*UK average for all town centres surveyed by Goad Plans (March, 2014)

Attleborough has outlets within most of the Goad comparison goods categories but the choice of shops within most categories is relatively limited. The choice of clothing shops is poor when compared with the national average. The proportion of electrical/gas/ music/ photography and chemists/opticians is higher than the national average. Only one category has no representation i.e. cars/motorcycles accessories.

In terms of convenience retailers, the centre contains a Lidl and a Sainsbury's together with a range of independent convenience retailers. The Lidl is currently being extended.

Service Uses

Attleborough has a good range of non-retail service uses, with all categories represented as shown in Table E.3. These sectors have grown slightly since 2010.

The number of Class A3-A5 units has increased significantly since 2010, albeit the proportion is still below the national average.

In addition to these service uses, Attleborough also contains a hotel, veterinary surgery, dentist surgery and a dog grooming centre.

Table E.3 Attleborough Town Centre Analysis of Selected Service Uses

Type of Unit	Attleborough			% UK Average*
	Units 2010	Units 2014	%	
Restaurants/cafés	14	11	19.3	23.3
Fast food/takeaways	-	8	14.0	15.2
Pubs/bars	2	4	7.0	7.6
Banks/other financial professional services	10	12	21.0	12.9
Betting shops/casinos	-	3	5.3	4.0
Estate agents/valuers	6	5	8.9	9.5
Travel agents	1	1	1.7	2.5
Hairdressers/beauty parlours	12	11	19.2	22.9
Laundries/dry cleaners	2	2	3.5	2.2
Sub- Total	**47**	**57**	**100.0**	**100.0**
Other A1 Services	7	1	n/a	n/a
Total	**54**	**58**	**n/a**	**n/a**

Source: 2010 Retail Study, Independent Survey 2014 (Cllr J North).

*UK average for all town centres surveyed by Goad Plans (March, 2014)

Vacant Units

There were 3 vacant units in Attleborough town centre at the time of the land use survey in 2014. The vacancy rate (2.9%) is significantly below the national average (12.1%) which is a sign of a healthy centre.

Summary of Attleborough's Strengths and Weaknesses

Strengths

- The centre plays a local service shopping role; primarily serving the day to day shopping and service needs of local residents.
- The Sainsbury's store is a key anchor store and generates some linked shopping trips.
- Attleborough is a traditional market town. It provides a high quality shopping environment, with the original period buildings complemented by new developments to maintain the character of the area.
- Attleborough has a very low vacancy rate. This suggests demand for retail units is high.
- St Mary's Church provides an attractive focal point in the heart of the town.

Weaknesses

- Traffic flow was high at the time of the survey, which inhibits pedestrian movement through the centre.

- There is a lower than average proportion of restaurants and cafes which may suggest visitors are going elsewhere for these services, especially in the evening.
- There is a limited range and choice of retail shops and services. 8% of respondents to the household survey claimed they would shop in Attleborough more often if there was a greater number, type, range and/ or quality of shops in the town centre.

Appendix 6 Household Survey Results

Household Survey Results

Survey Structure

NEMS Market Research carried out a telephone survey of 1,000 households across the Breckland study area in July 2014. The study area was split into six zones, based on ward boundaries. The number of interviews undertaken reflects the population in each zone in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and top up grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - other non-food items (e.g. books, CDs, DVDs, toys and gifts).

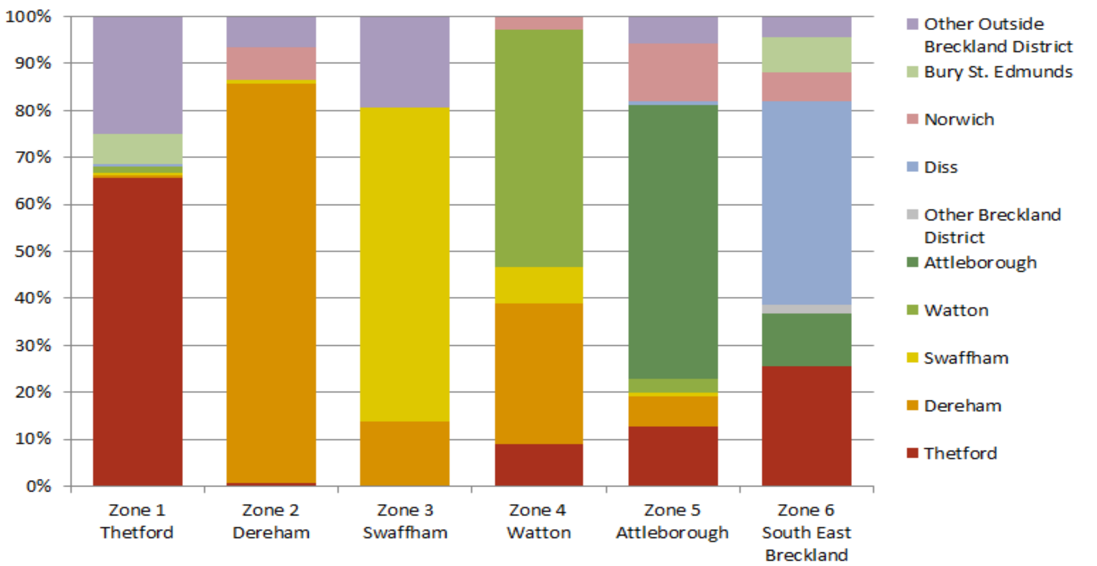
Main Food Shopping

Respondents were asked where they last undertook their main food and grocery shopping.

The Morrison's store in East Dereham was the most popular destination within Breckland, attracting 13.7% of main food shopping trips for the district as a whole, closely followed by the Tesco store on Kilverstone Lane, Thetford attracting 12.4% of trips and the Tesco store in Dereham attracting 11.4% of trips. The internet was used by 1.6% of respondents. The market share of main food shopping for the main centres is shown in Figure A below.

Zone 4 (Watton) retains the highest proportion of main food shopping within the district (97.1%). Zone 2 (Dereham) retains 86.5% of main food shopping within the district, followed by Zone 5 (Attleborough – 81%), Zone 3 (Swaffham – 80.6%) and Zone 1 (Thetford – 68.3%). Zone 6 (South East Breckland) retains the lowest proportion (38.5%), with spending leaking to stores and centres outside, in particular Diss, Norwich and Bury St. Edmunds. The influence of centres outside of Breckland is evident in Figure A below.

Figure A Main Food Shopping



Source: NEMS Household Survey July 2014

Mode of Travel for Main Food Shopping

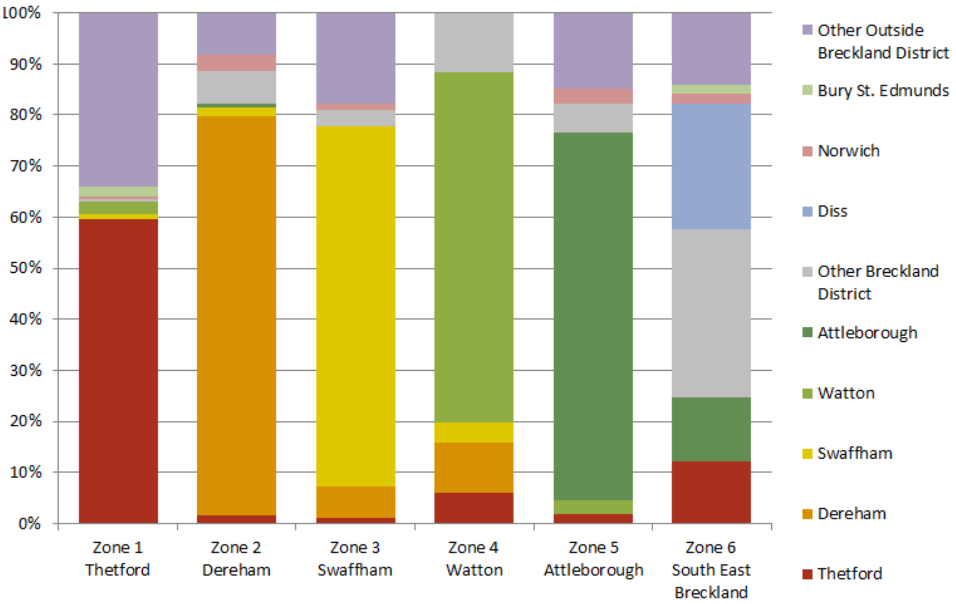
In the whole study area, 89.3% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). This is typical for a rural district. A lower proportion walk to their main food shopping destination (6.7%) compared to the NLP average of 11.7%, and a lower proportion of households travel by bus (1.3%) compared to the NLP averages derived from other surveys of 8.6%.

Top-Up Food Shopping

Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. 79.1% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips. The market share of top-up food shopping for each centre is shown in Figure B below.

The Tesco store in Dereham attracts the highest proportion of top-up trips (5.4%), however the patterns of top-up food shopping are more diverse, with a wide range of stores within the district each capturing a small proportion of the market share. All zones except Zone 1 retain a higher proportion of top-up spending within the district than for main food shopping. Zone 4 retains 100% of top-up spending in the district, with the lowest proportion retained in Zone 6 (58%).

Figure B Top Up Food Shopping



Source: NEMS Household Survey July 2014

Non-Food Shopping

Respondents were asked in which location they buy most of their household's non-food shopping.

For the study area as a whole, Norwich was the most popular destination with 26.9% of all respondents shopping there, followed by Dereham (22.3%). 12.5% do most of their non-food shopping in Bury St. Edmunds and 11.4% in Thetford. This demonstrates that two of the most popular destinations are outside the district and over 50% of non-food shopping is carried out outside the district. Overall 4.1% of respondents buy most of their non-food shopping on the internet or have it delivered. The South East Breckland zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/by mail order (7.8%), followed by the Watton zone (7.3%) and the Thetford zone (4.5%).

The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 81% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (6.9%) followed by walking (5.8%).

Non-Food Shopping Destinations

The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping. The market share for each non-food goods category within Breckland is shown in the graphs below and overleaf. The influence of Diss (mainly for Zone 6), Norwich and Bury St. Edmonds outside the district is clearly evident.

Figure C Clothing and Shoes

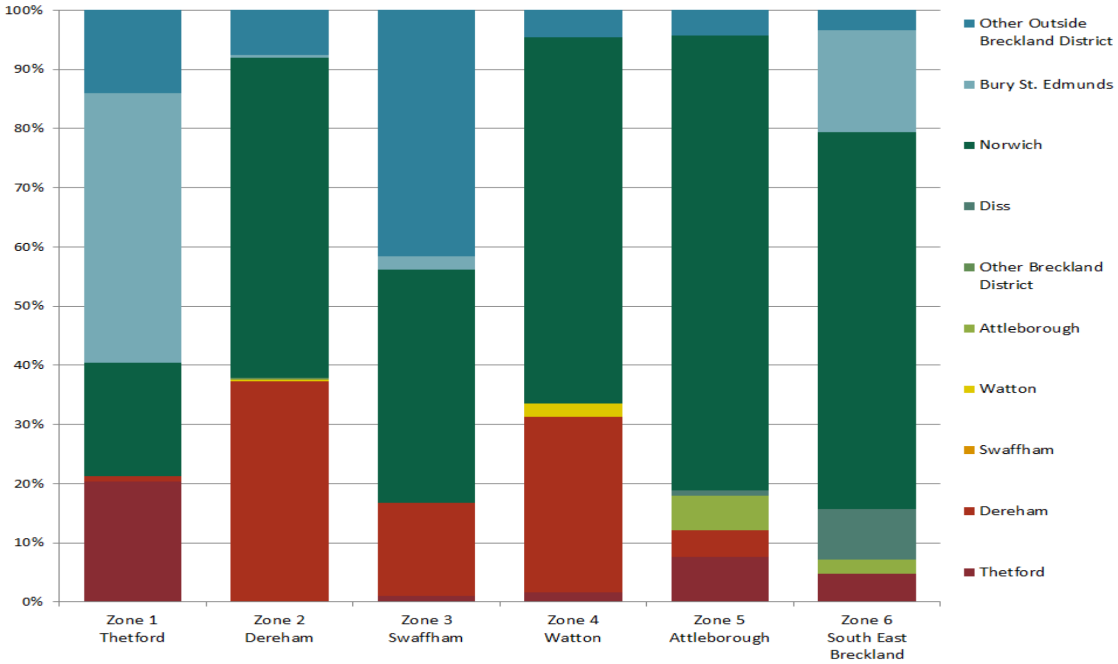
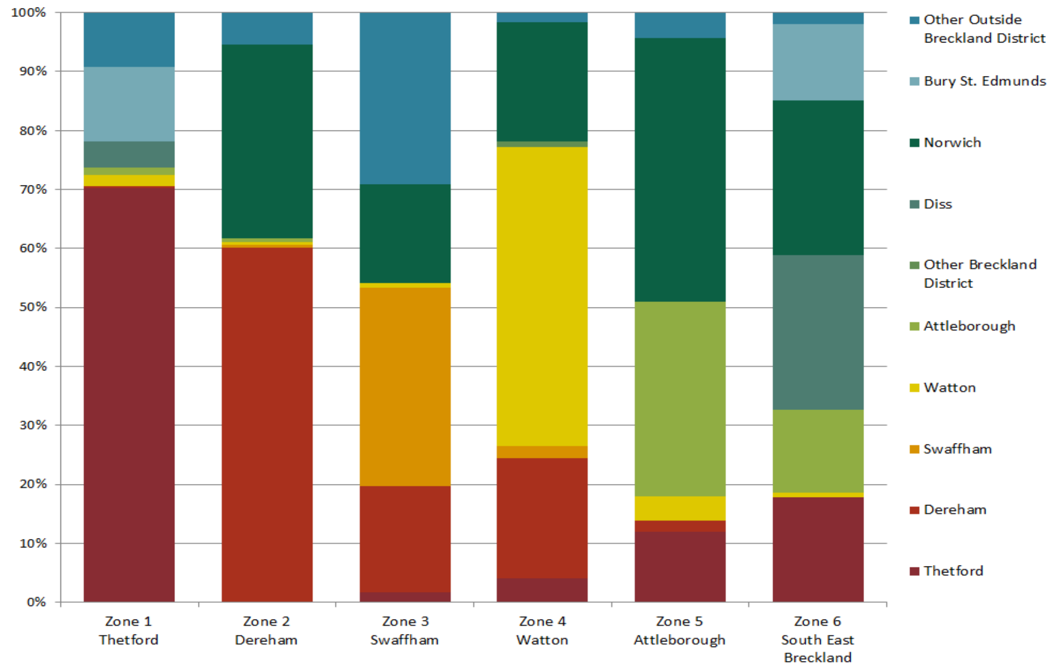


Figure D Domestic Electrical Appliances



Source: NEMS Household Survey July 2014

Figure E Other Electrical Goods

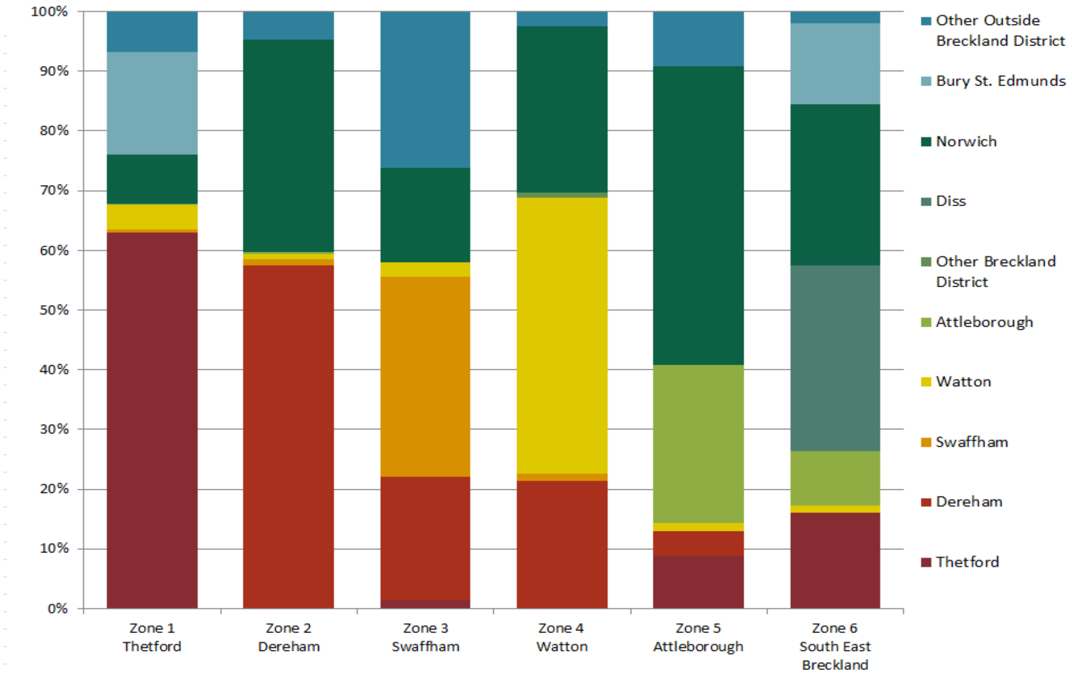
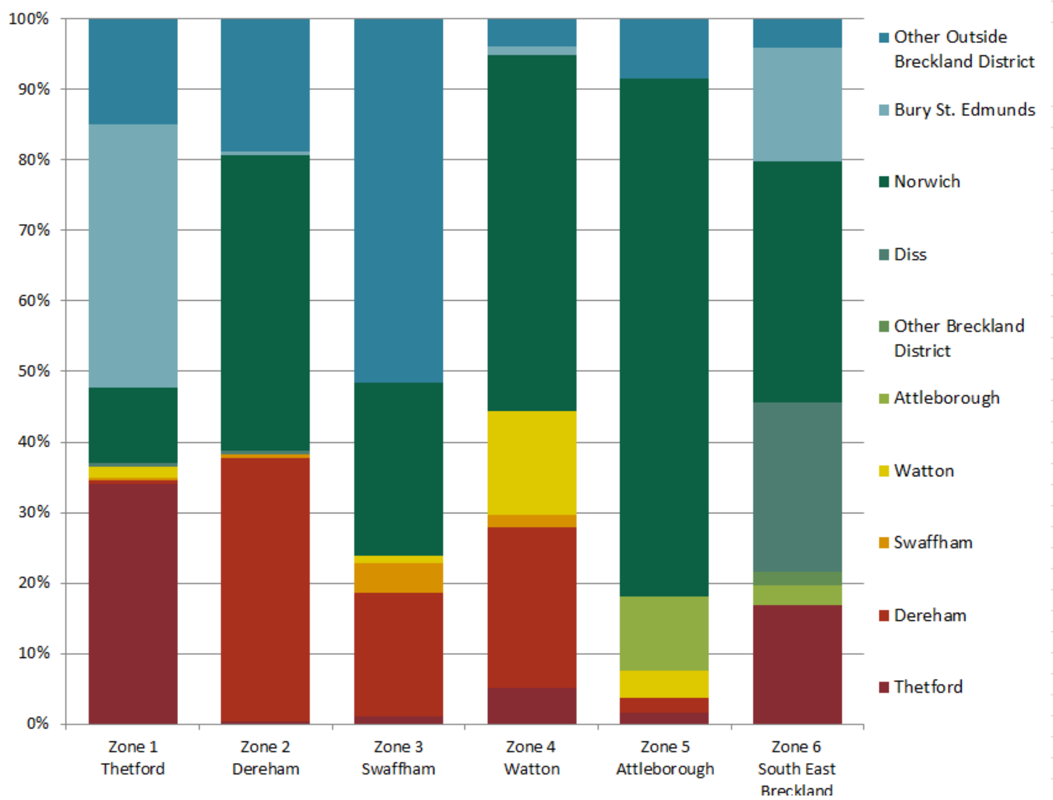


Figure F Furniture, Soft Furnishings and Floor Coverings



Source: NEMS Household Survey July 2014

Figure G DIY, Hardware and Garden Items

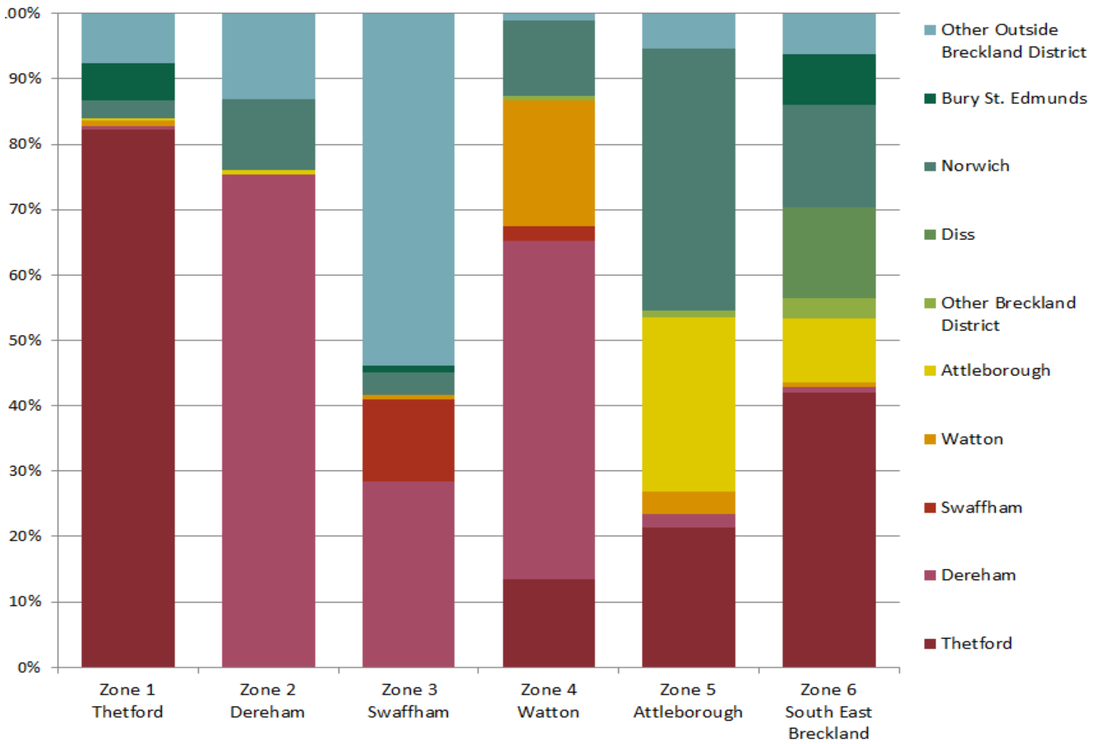
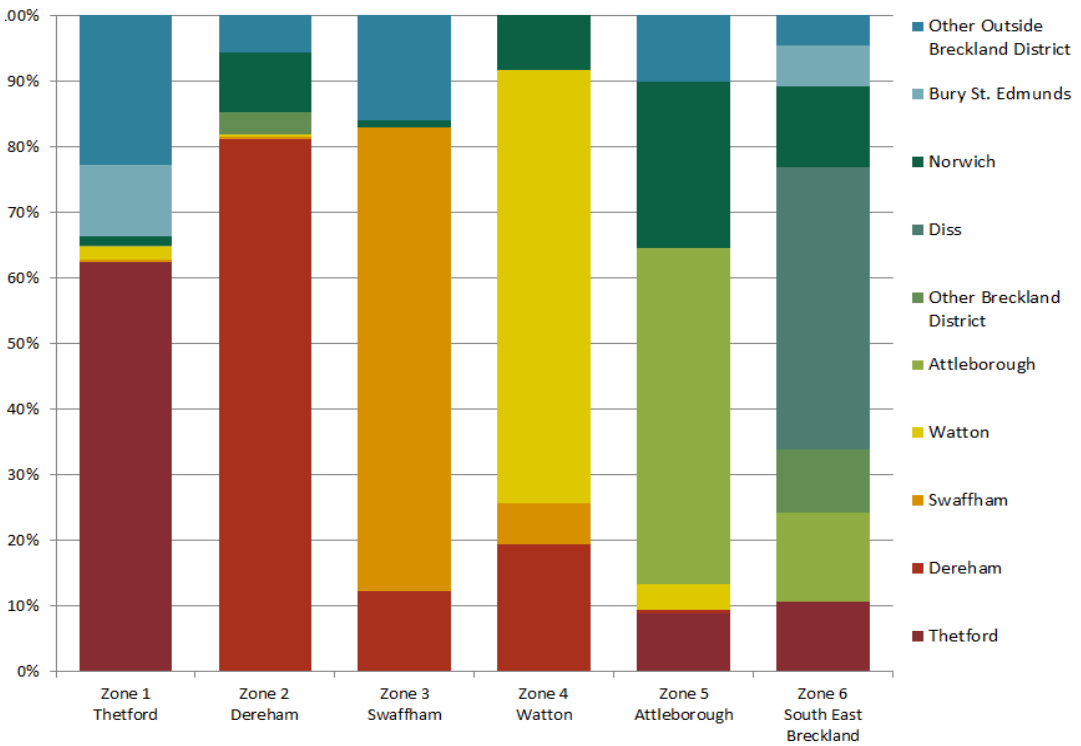
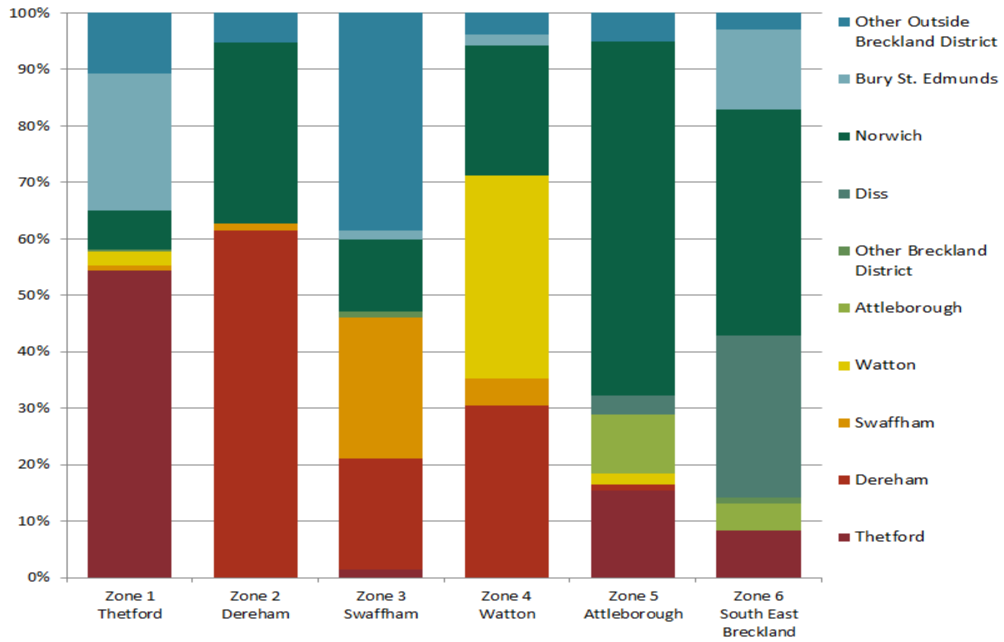


Figure H Health, Beauty and Chemist



Source: NEMS Household Survey July 2014

Figure I Books, CDs, Toys and Gifts



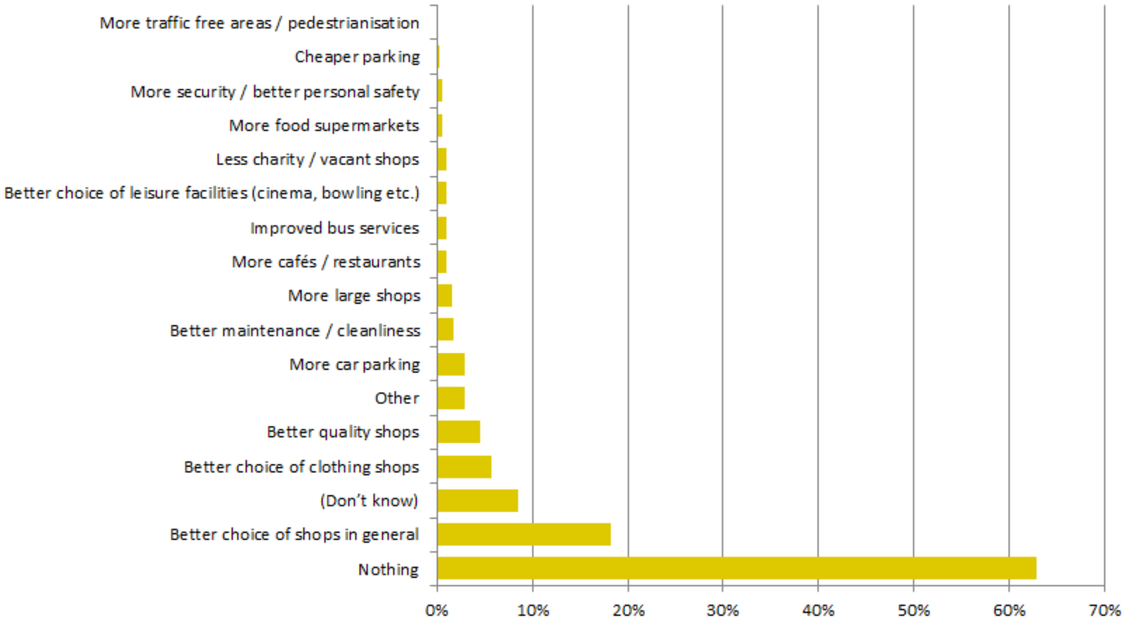
Source: NEMS Household Survey July 2014

Shoppers' Views

The household survey asked respondents what would make them visit the main centres more often. The results are shown in Figures J to N below.

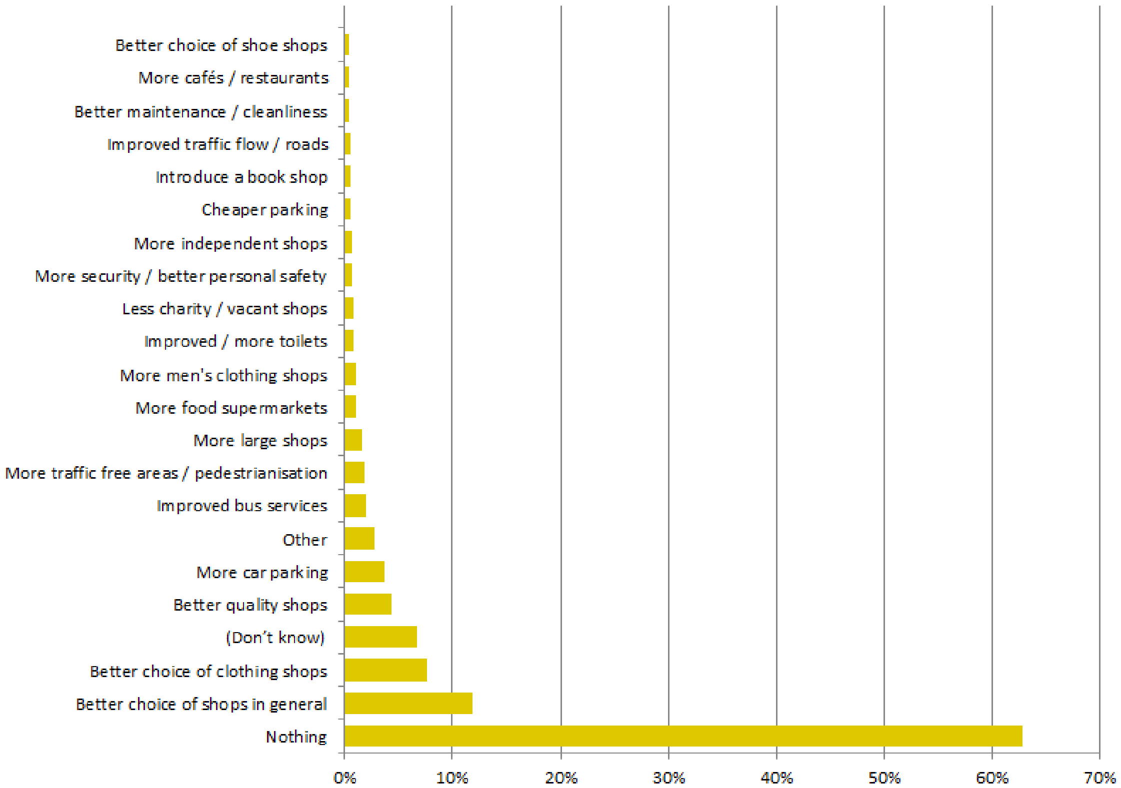
- **Thetford Town Centre**: 62.8% responded that nothing would make them visit Thetford town centre more often. 18.3% responded a better choice of shops, and specifically 5.7% responded better choice of clothing shops. 4.5% said better quality shops would make them visit the town centre more often whilst 2.9% said more car parking. 8.6% said they didn't know what would make them visit Thetford town centre more often.
- **Dereham Town Centre**: 62.8% responded that nothing would make them visit Dereham town centre more often. 11.9% responded a better choice of shops, and specifically 7.6% responded better choice of clothing shops. 4.3% said better quality shops would make them visit the town centre more often whilst 3.8% said more car parking. 6.7% said they didn't know what would make them visit Dereham town centre more often.

Figure J Things that Residents Feel Would Make Them Visit Thetford Town Centre More Often



Source: NEMS Household Survey July 2014

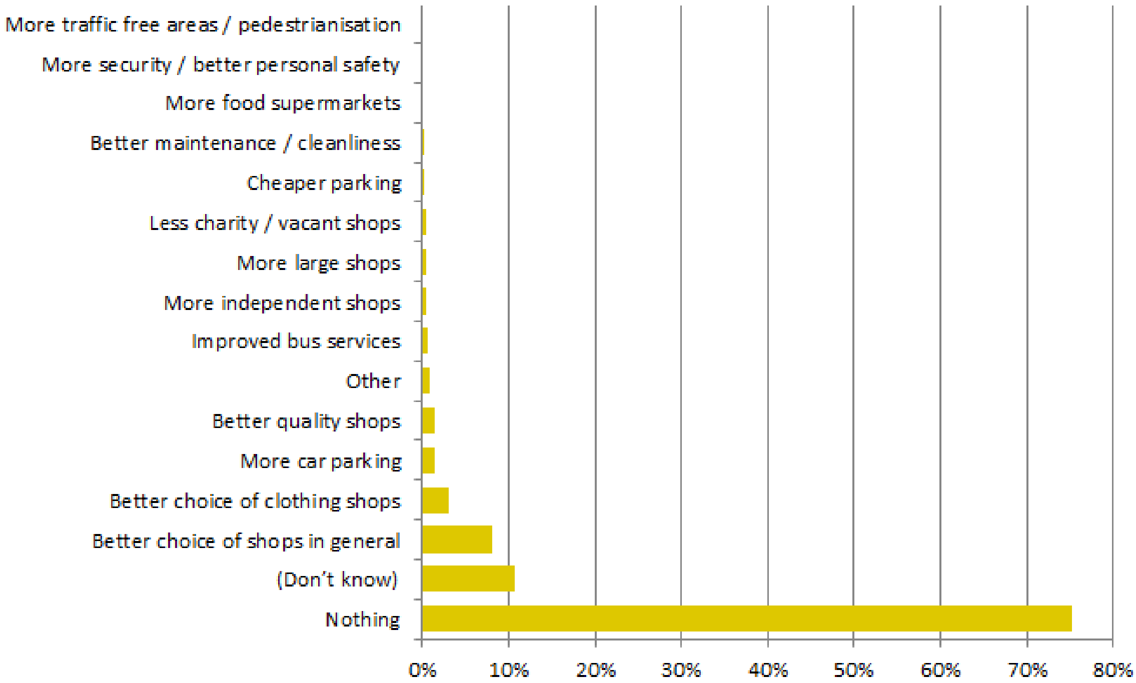
Figure K Things that Residents Feel Would Make Them Visit Dereham Town Centre More Often



Source: NEMS Household Survey July 2014

- **Swaffham Town Centre**: 75.2% responded that nothing would make them visit Swaffham town centre more often. 8% responded a better choice of shops, and specifically 3.1% responded better choice of clothing shops. Only 1.5% responded more car parking and only 1.4% said better quality shops would make them visit the town centre more often. 10.8% said they didn't know what would make them visit Swaffham town centre more often.

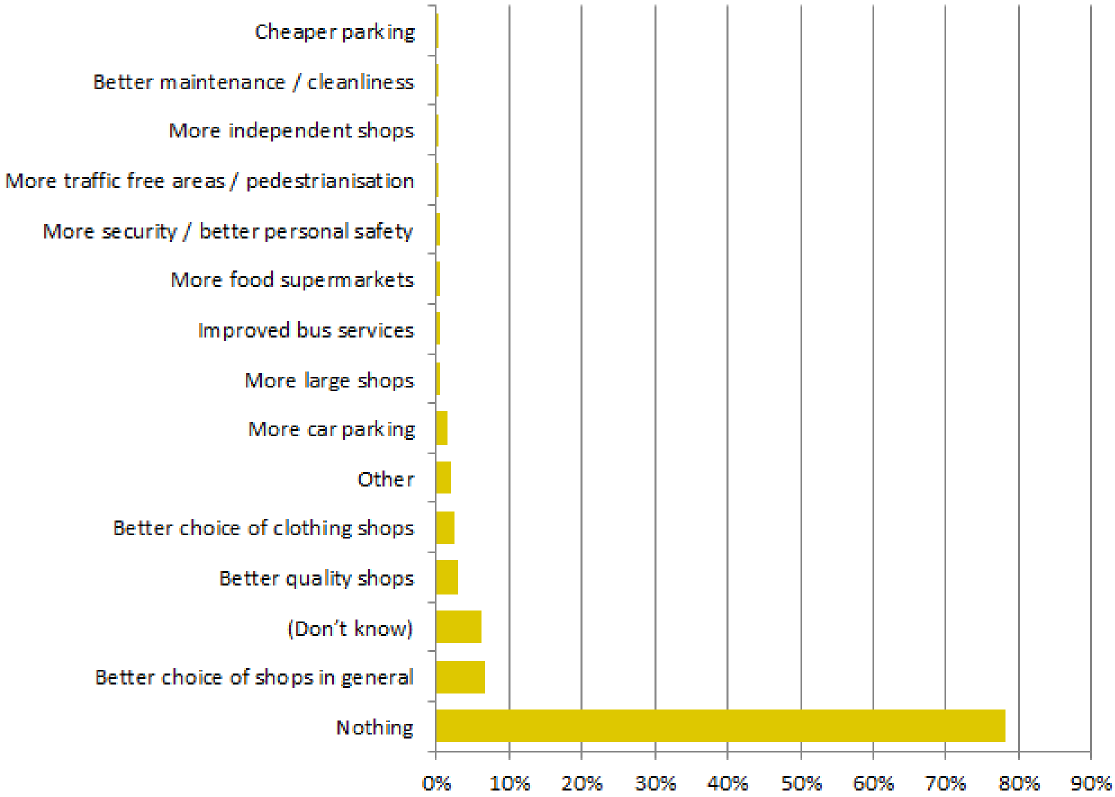
Figure L Things that Residents Feel Would Make Them Visit Swaffham Town Centre More Often



Source: NEMS Household Survey July 2014

- **Watton Town Centre**: 78.2% responded that nothing would make them visit Watton town centre more often. 6.7% responded a better choice of shops, and specifically 2.4% responded better choice of clothing shops. 3.1% said better quality shops would make them visit the town more often whilst 1.6% said more car parking. 6.3% said they didn't know what would make them visit Watton town centre more often.

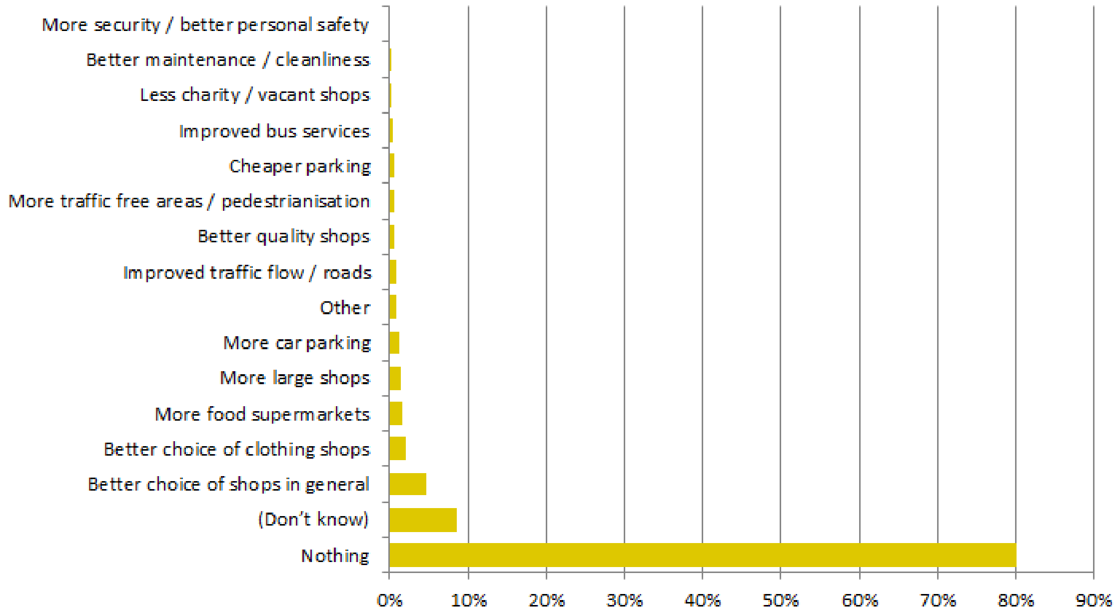
Figure M Things that Residents Feel Would Make Them Visit Watton Town Centre More Often



Source: NEMS Household Survey July 2014

- **Attleborough Town Centre**: 80% responded that nothing would make them visit Attleborough town centre more often. 4.7% responded a better choice of shops, and specifically 2.1% responded better choice of clothing shops. Only 1.2% responded more car parking and only 0.7% said better quality shops would make them visit the town centre more often. 8.7% said they didn't know what would make them visit Attleborough town centre more often.

Figure N Things that Residents Feel Would Make Them Visit Attleborough Town Centre More Often

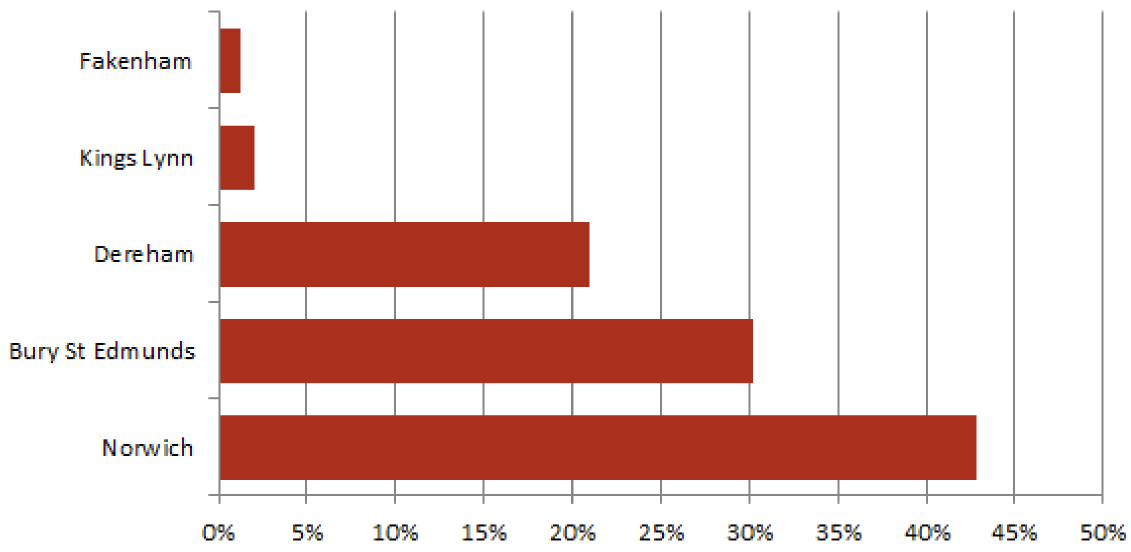


Source: NEMS Household Survey July 2014

Leisure Activities

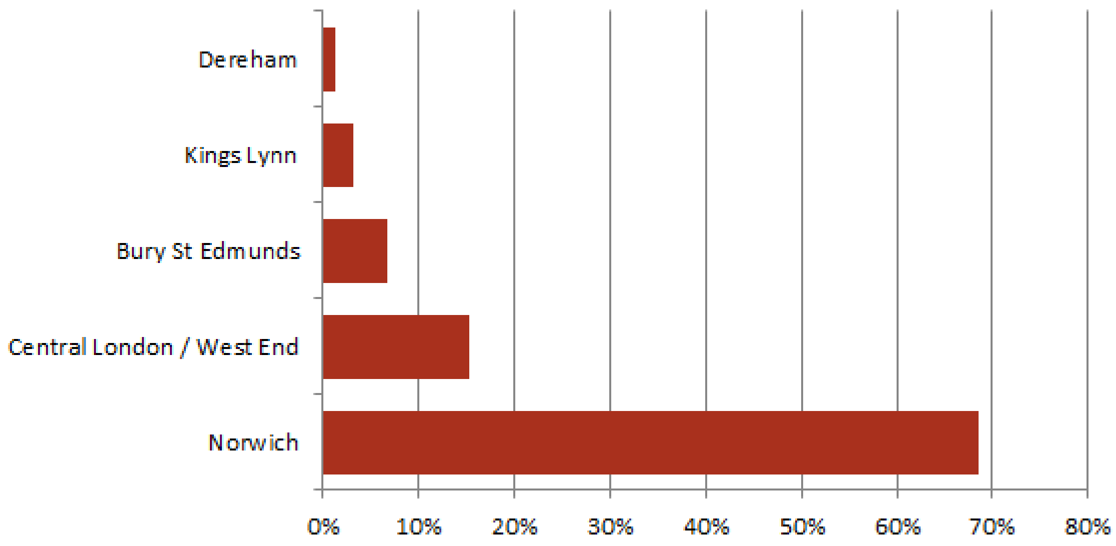
The household survey asked respondents what leisure activities they or their family participate in in their spare time. The figures below show the most popular destinations, for those who responded that they partook in the various leisure activities.

Figure O Visits to Cinemas



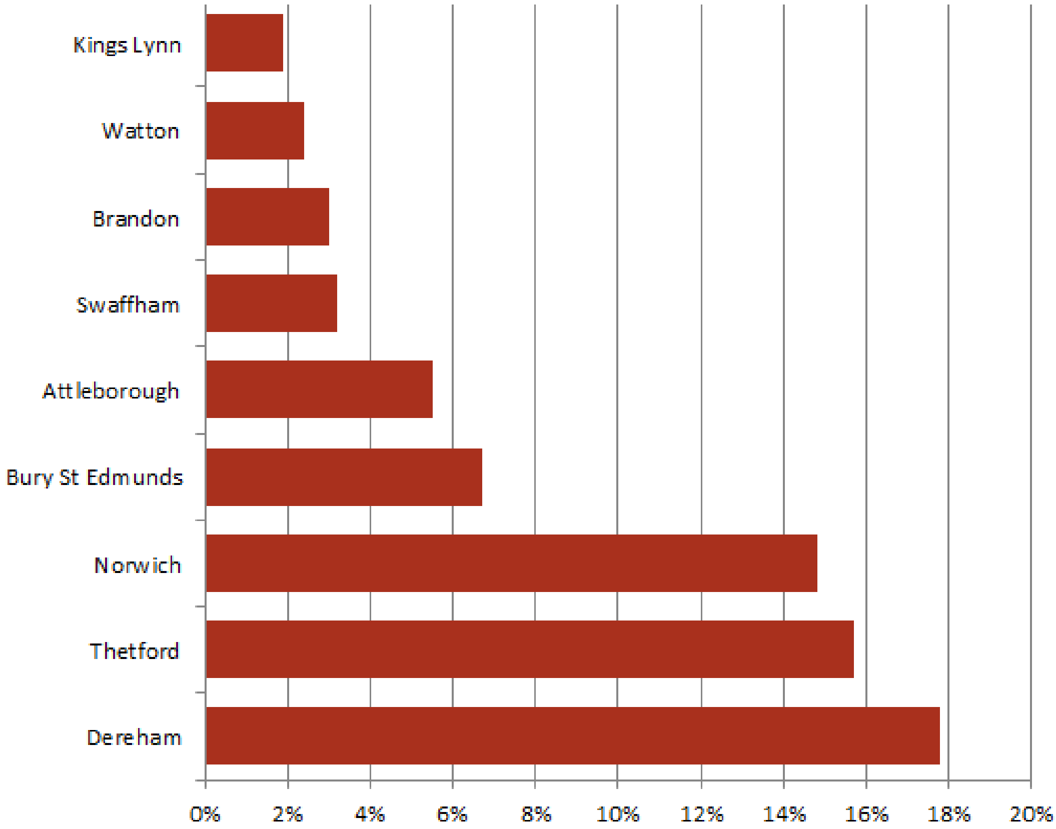
Source: NEMS Household Survey July 2014

Figure P Visits to Theatre



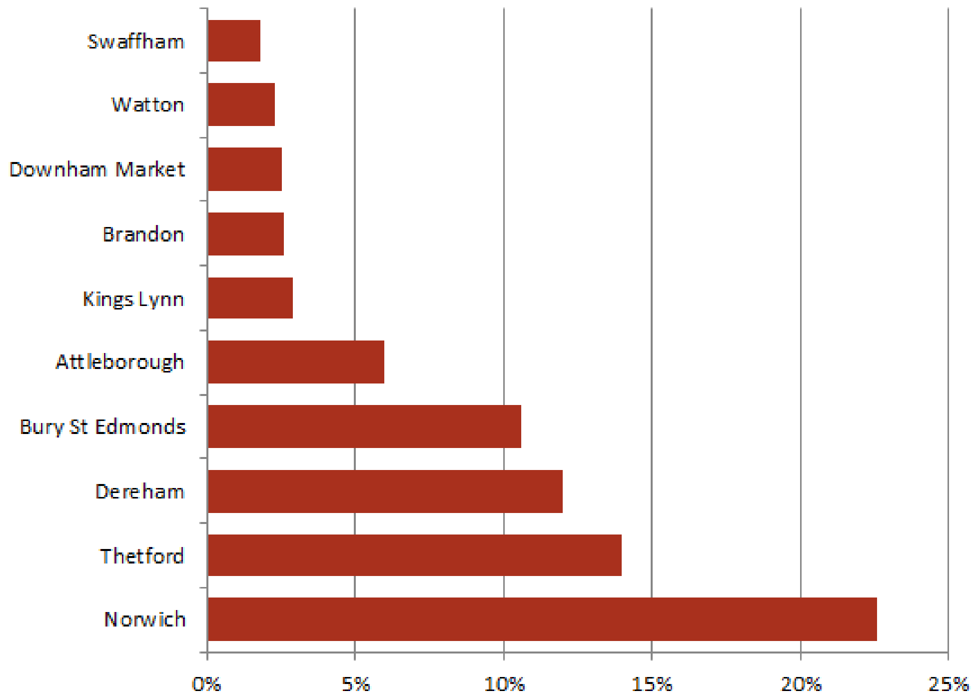
Source: NEMS Household Survey July 2014

Figure Q Visits to Pubs/Bars



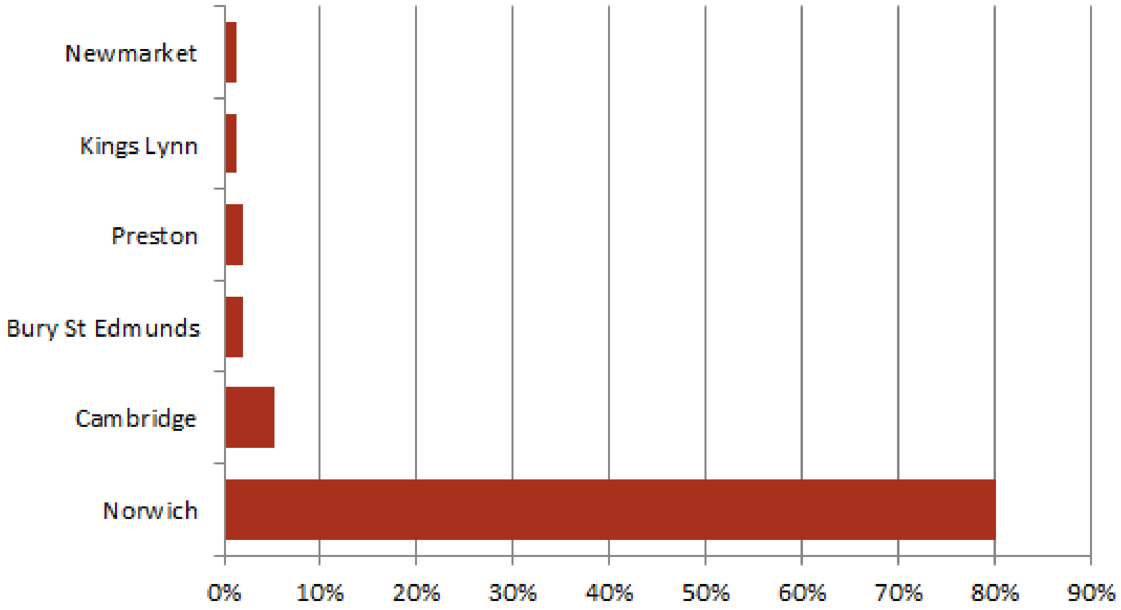
Source: NEMS Household Survey July 2014

Figure R Visits to Restaurants



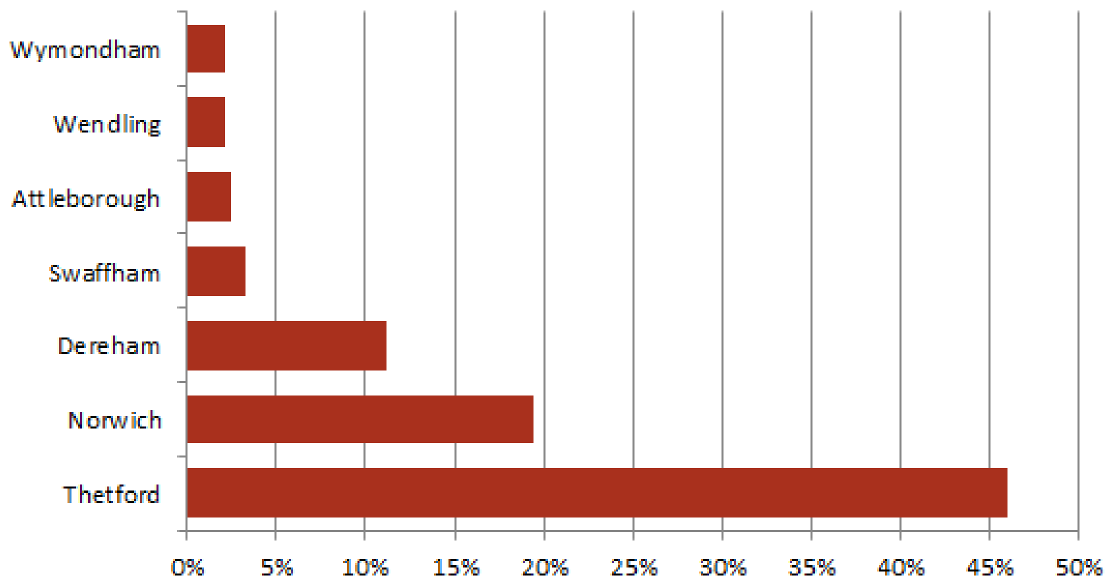
Source: NEMS Household Survey July 2014

Figure S Visits to Nightclubs



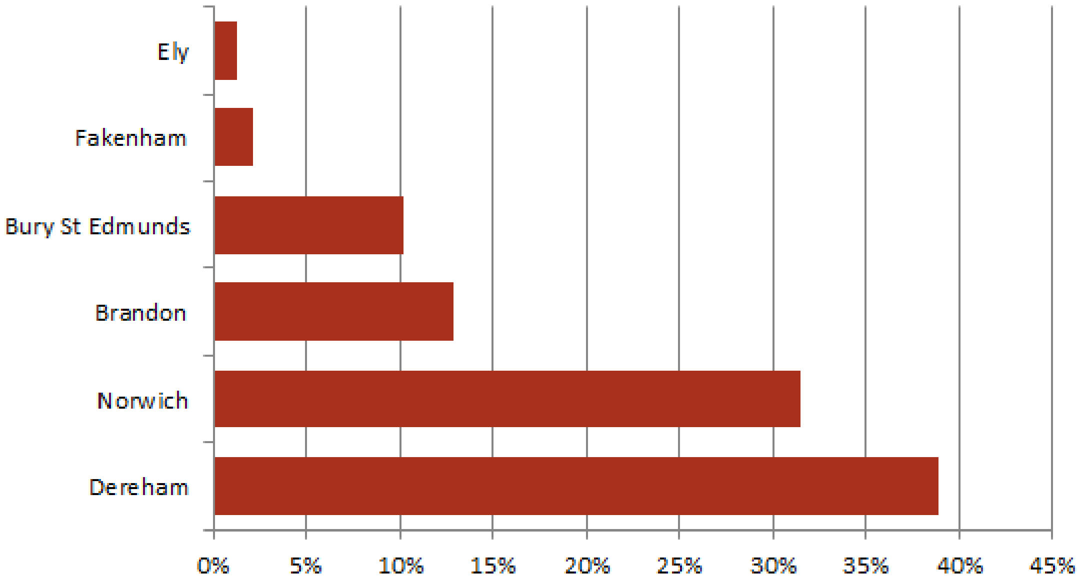
Source: NEMS Household Survey July 2014

Figure T Visits to Bingo



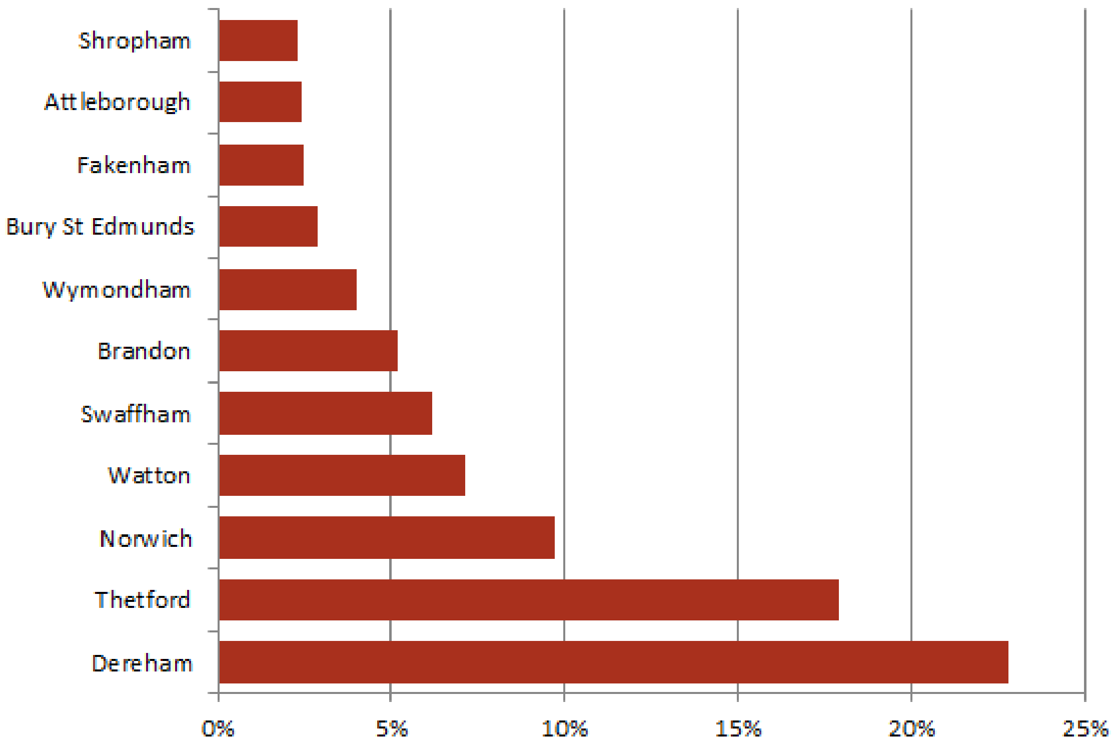
Source: NEMS Household Survey July 2014

Figure U Visits to Ten Pin Bowling



Source: NEMS Household Survey July 2014

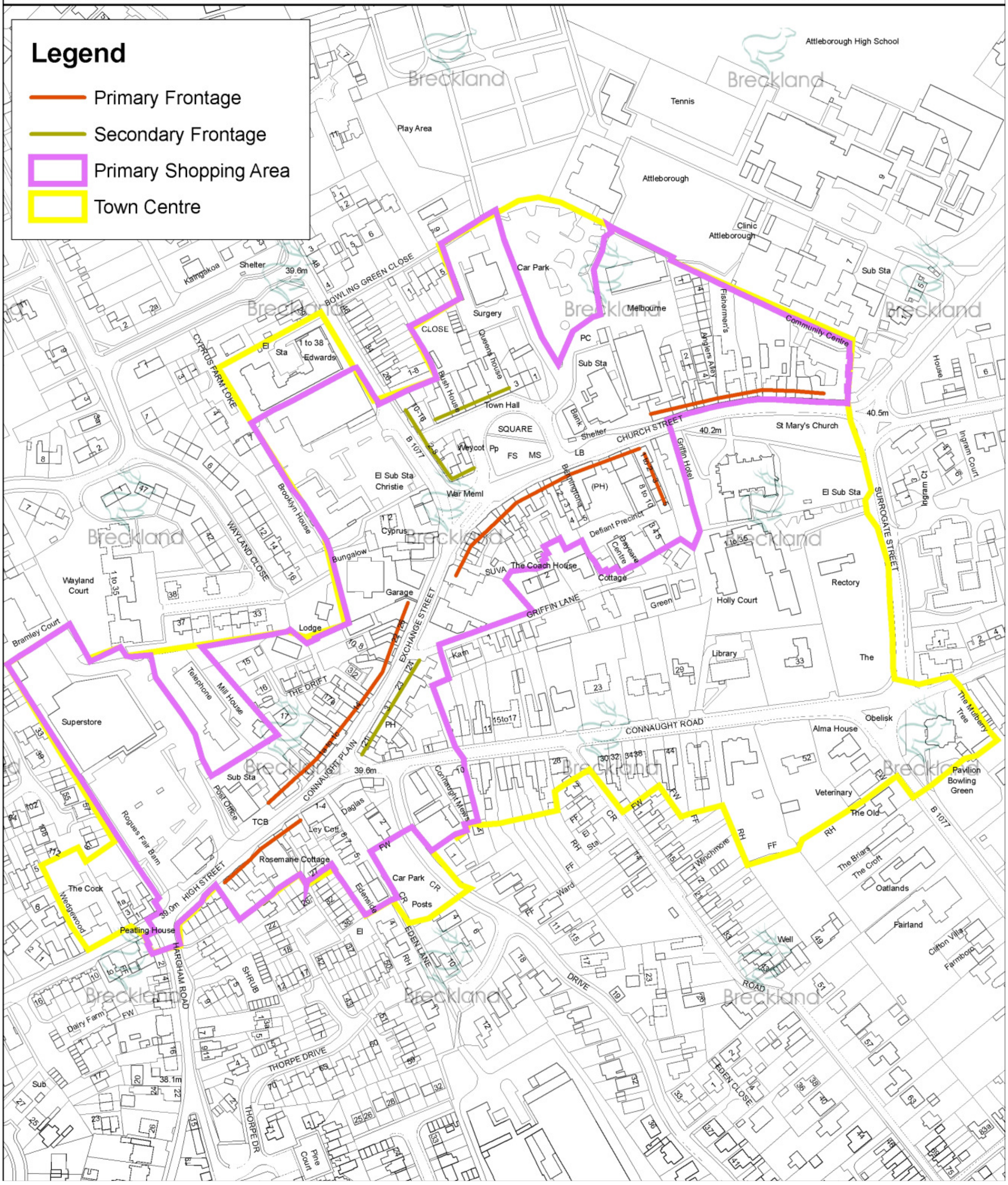
Figure V Visits to Health clubs/Gyms



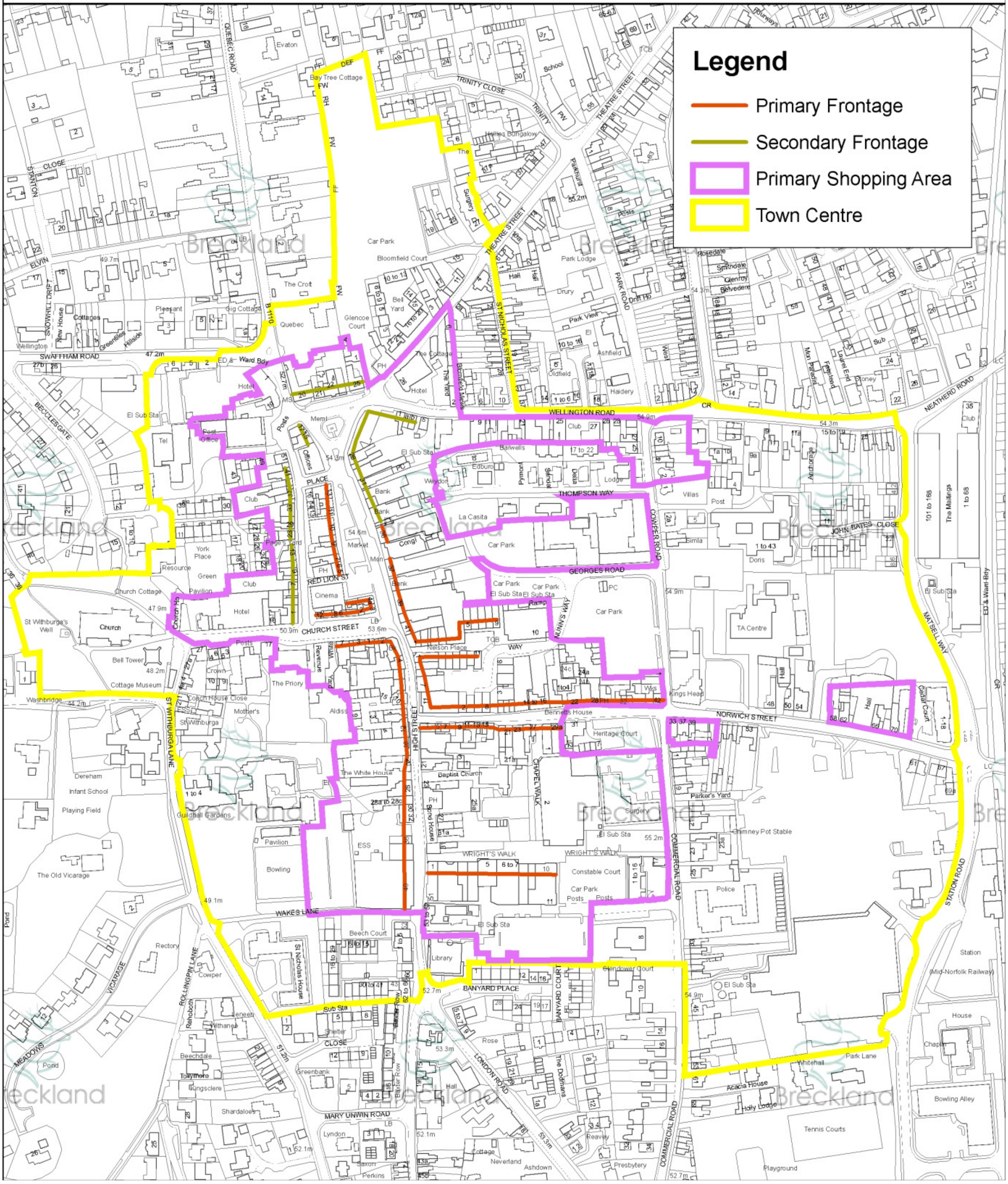
Source: NEMS Household Survey July 2014

Appendix 7 Centre Boundaries and Frontages

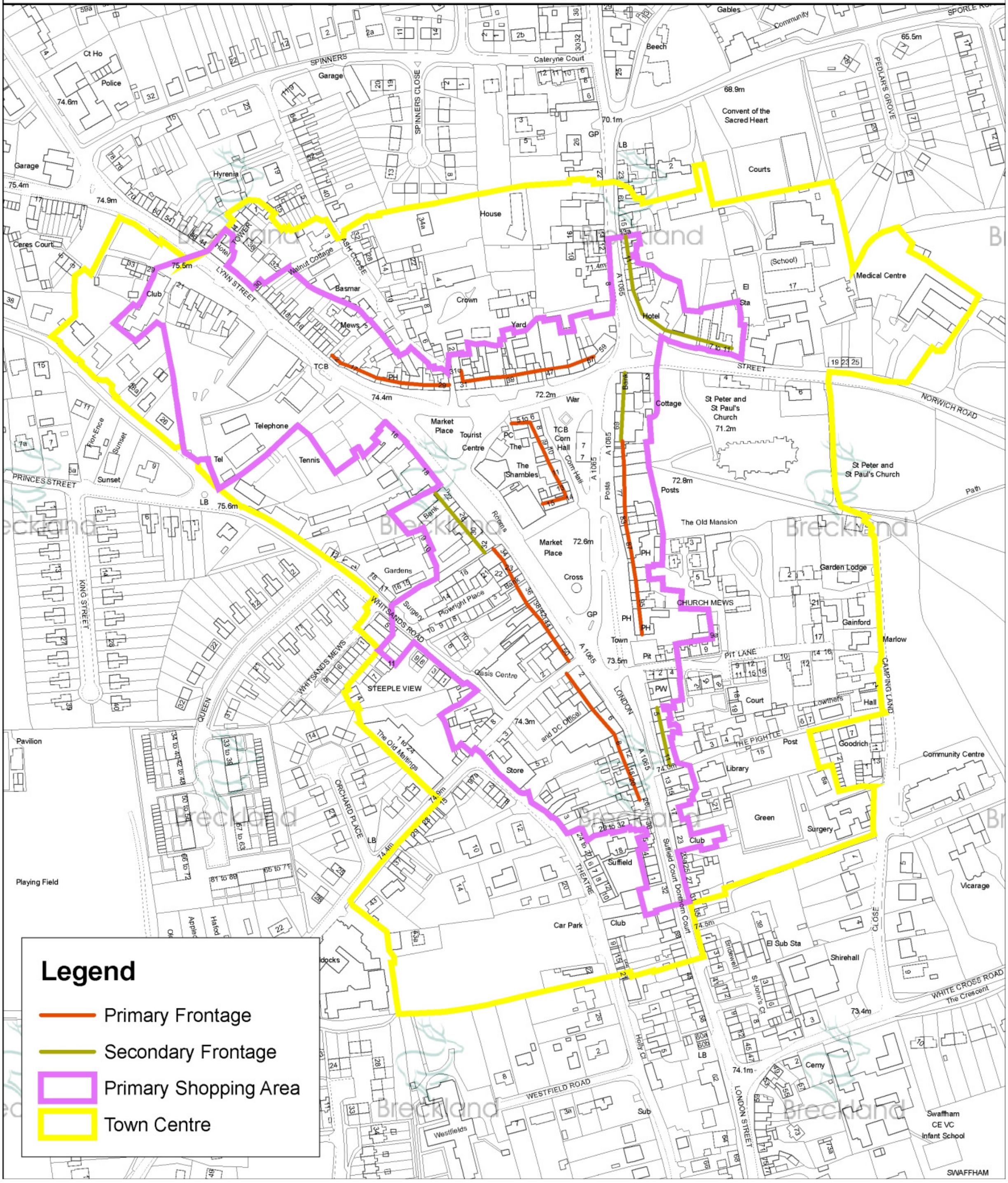
Attleborough Town Centre



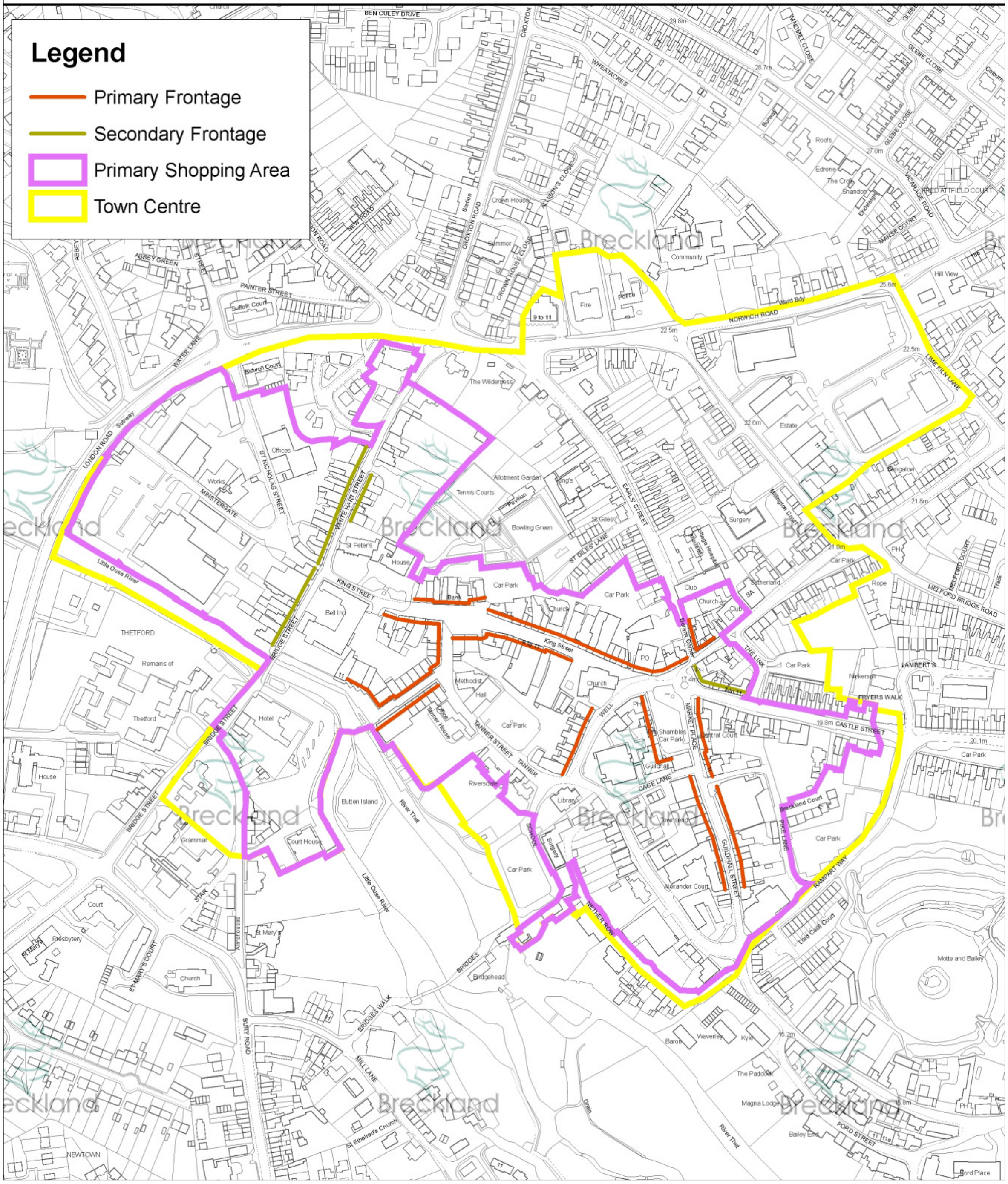
Dereham Town Centre



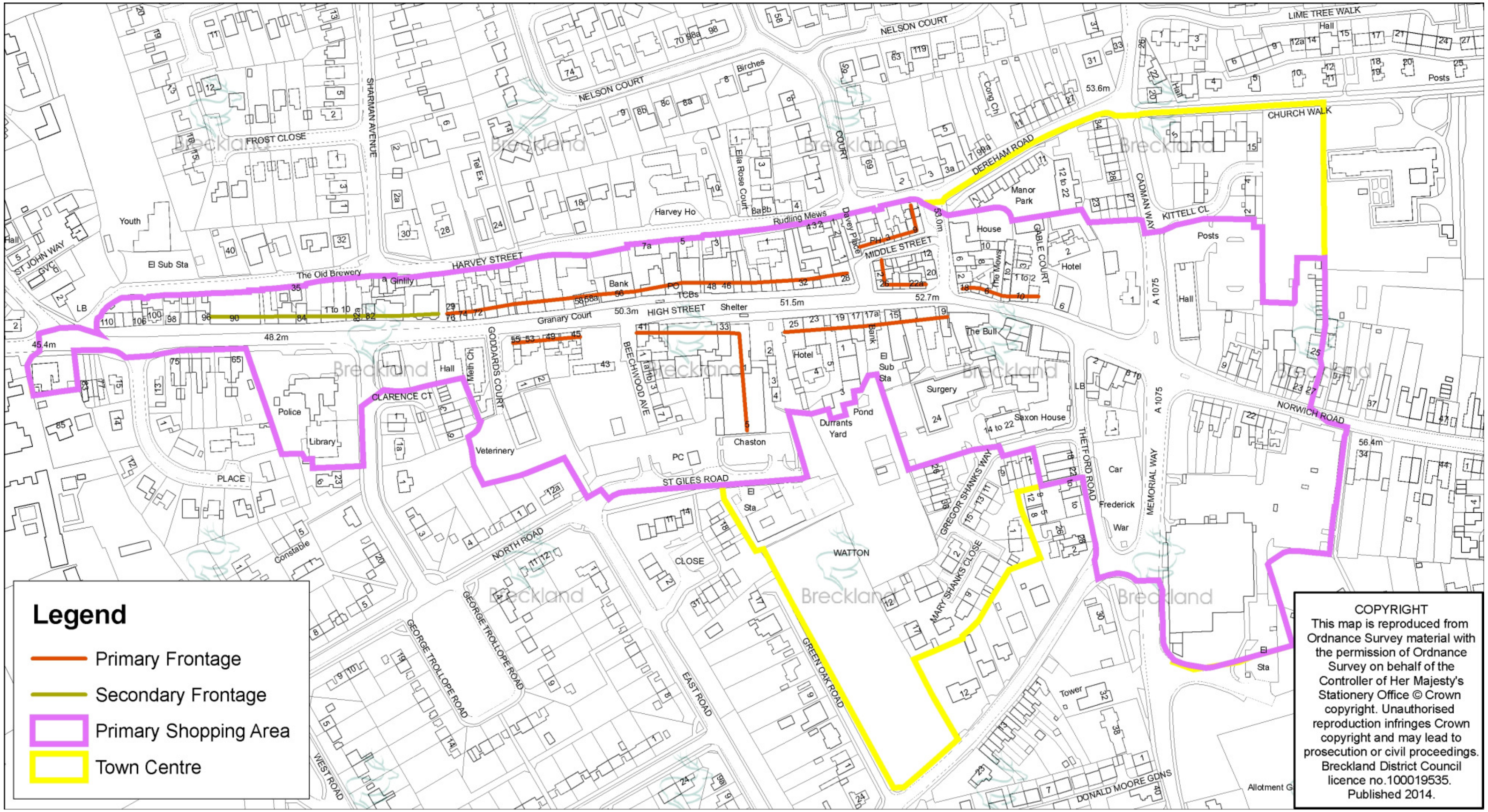
Swaffham Town Centre



Thetford Town Centre



Watton Town Centre



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