BRECKLAND COUNCIL

FUTURE BRECKLAND

EVIDENCE ENCYLOPEDIA

DRAFT: JULY 2022

HATCH

WE MADE THAT

Evidence **Encyclopedia Contents**

Page Number

1.1

Introduction & Context

Breckland **Evidence Encyclopedia**

Introducing Breckland's evidence base…

This evidence base is split into two parts – the first focuses on the socio-economic performance of Breckland and its market towns and the second provides a deep dive into the role and function of Dereham, Attleborough, Thetford, Watton and Swaffam. The evidence is structured around the following themes:

+ **Economy** – understanding Breckland's business landscape, employment characteristics and specialisms;
+ **People** – understanding Breckland's resident and worker population to ensure that the five market towns better serve their needs and aspirations; and,
+ **Place** – understanding the spatial, social and environmental factors affecting the prosperity and vitality of Breckland's places.

The evidence base is guided by three principles:

1. **Fusing quantitative and qualitative insight.** Evidence marries robust quantitative data with a rich qualitative review of local challenges and opportunities to provide a holistic picture of town performance;
2. **Contextualizing the role of market towns.** The data unpicks the challenges and opportunities both at a district level and within each specific town to understand the role and function of each town within the wider local, regional and national socio-economic context; and,
3. **Focused on implications for Breckland.** The evidence base is action orientated to create a compelling narrative for place. This is achieved by focusing on the policy implications for the district council and its partners to ensure Town Delivery Plans are evidence-led.

Evidence encyclopaedia structure

Evidence: **Part 1**

Building a district-wide investment case…

Part 1 of this evidence base presents the socio-economic performance of Breckland as a whole and its five market towns.

Grouping the evidence in this way ensures an easy read-across from the district level to individual towns. It provides a clear picture of the function, importance and socio-economic character of each town in the context of wider sub-regional performance.

The district wide analysis defines the challenges for Breckland as a whole (including its rural population) meaning that the town-specific data can be used to help address these district wide concerns.

Under each thematic area (economy, people and places) the evidence is firstly presented at the district-level to understand how Breckland performs before drilling down to 'in focus' sections looking at the socio-economic performance of the five market towns. Where possible, data for all five market towns has been presented collectively to show how each town performs against each other and against competitors.

This evidence is brought together through the **Making the Case for Breckland** section. This pulls together the key statistics on need and opportunity to build a rationale for investment in both the district and its constituent market towns.

Part 1 evidence structure

Evidence **Part 1**

Breckland's economy

1. Headline economic performance
2. Business and innovation
3. Sector deep-dive
4. Employment
5. Impact of COVID-19

Breckland's people

1. Demographics
2. Skills and qualifications
3. Social mobility
4. Occupations
5. Health and wellbeing
6. Impact of COVID-19

Breckland's places

1. Deprivation
2. Digital infrastructure
3. Public transport
4. Impact of COVID-19
5. Commercial property
6. Environment
7. Housing

Making the case for Breckland

Bringing together the key metrics which articulate Breckland's investment need and opportunity

The first phase of the evidence baseline answers the following types of questions:

- What are the key challenges and opportunities facing the district?
- What is the rationale for focusing on Breckland's five market towns?
- What are the key challenges and opportunities for Breckland's five market towns?
- What are the key 'hard hitting' metrics to underpin a strong investment case for Breckland centred on both need and opportunity?
- How do district-wide challenges affect market town performance, vitality and prosperity?

Evidence: **Part 2**

Building a deep understanding of Breckland's five market towns…

Building on the data presented in the first part of the evidence base, Part 2 provides detailed drill downs for each of the five market towns to clarify the current role and function of each town and their current strengths, weaknesses, opportunities, and threats.

These include a summary of a place-based environmental assessment undertaken by We Made That which ensures that there is a quantitative and qualitative assessment of the function and character of each place.

This process provides insights into which towns are best placed to address district-wide challenges and where investment should be targeted to realise Breckland's growth opportunities.

Part 2 evidence structure

Evidence **Part 2**

Town Deep Dive: Dereham

Town Deep Dive: Attleborough

Town Deep Dive: Thetford

Town Deep Dive: Watton

Town Deep Dive: Swaffham

The second phase of the evidence baseline answers the following types of questions:

- Which town(s) will have a future-proofed town centre that meets that district's day-to-day retail/leisure needs?
- Which town(s) will be the advanced manufacturing hub and contribute to the Cambridge-Norwich Tech corridor?
- Which town(s) will provide workspace that allows businesses and workers to live outside of major cities?
- Which town(s) will attract people from London and the wider South East to live in the area?
- Which town(s) will provide the homes that Norwich and Cambridge need?
- Which town(s) will provide logistics space to take advantage of online retailing?

Study **geographies**

Ensuring a robust approach to understanding Breckland's market towns...

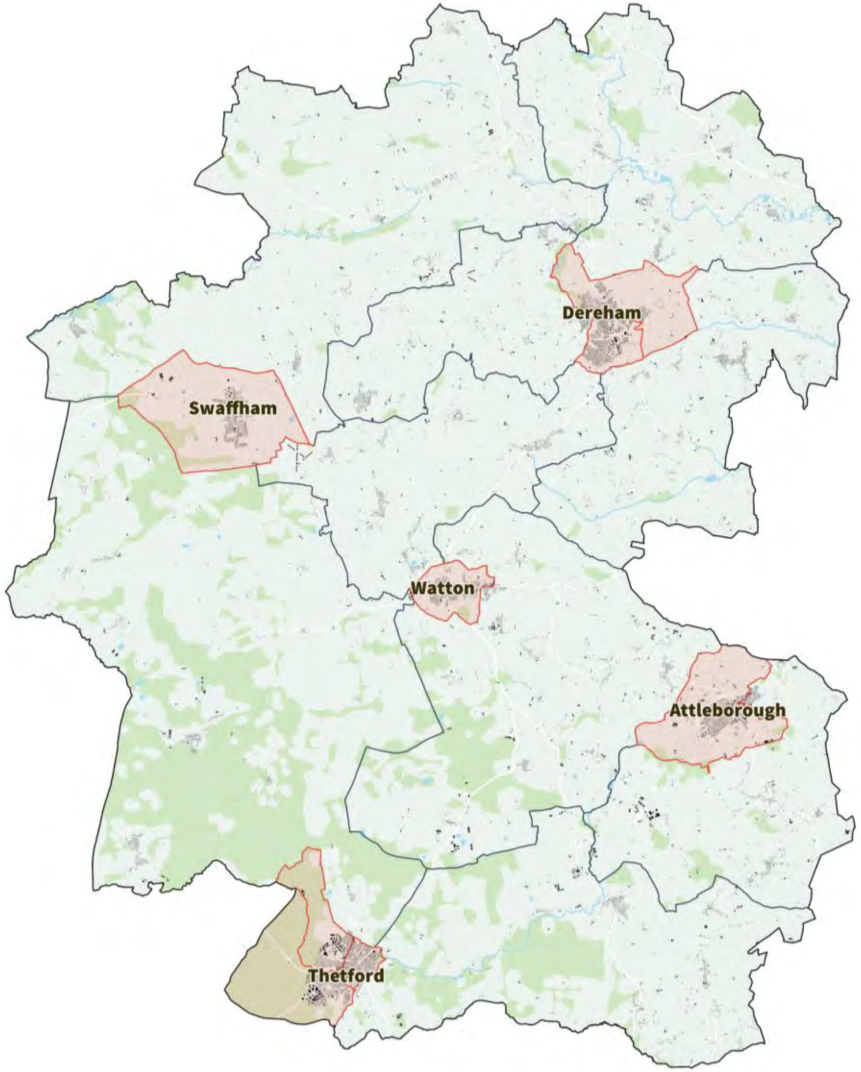
Due to the availability of ONS data it is important to define statistical geographies for each of Breckland's five market towns. Because of the rural character of the area, just one statistical area can cover a lot of land. It is therefore necessary to define 'best fit' statistical areas.

In line with best practice, we have used Major Super Output Areas (MSOAs) to define Breckland's five market towns as shown on the map. This is the lowest statistical level that most ONS data goes down to.

It should be noted that best-fit statistical geographies are rarely perfect and there is a risk that the MSOAs fail to capture important economic activity which sits outside of their boundaries. For example, in Watton, half of the Threxton Road Industrial Estate sits outside of the Watton MSOA. To avoid missing this important economic data, we have cross referenced all business data with wider sources, such as the Interdepartmental Business Register (IDBR), where available.

Where data is not recorded at MSOA level, we have assessed the wider built-up area. This approach ensures that the study considers the wider socio-economic function of each town ranging from the vitality and diversity of the town centres to the performance and contribution of business parks on the peripheries of Breckland's towns.

MSOA definitions of Breckland's five market towns



Comparator **geographies**

Contextualising the performance of Breckland and its market towns…

To contextualise the socio-economic performance of the district, the evidence base includes several comparator areas. These have been used to demonstrate the need and opportunity for investing in Breckland compared to areas that have recently been successful in obtaining government funding. The following comparators have selected:

+ **Norfolk, East of England, England**: *to analyse Breckland's performance against regional and national averages to understand the district's function and role in the regional economy;*

+ **North West and North East of England:** *these regions have recently been successful in obtaining government funding and are frequently highlighted to be at the centre of the Government's 'Levelling up' agenda. Comparing Breckland's performance against these regions has been used to strengthen Breckland's investment case; and,*

+ **Newark and Sherwood:** *has a similar economic geography to Breckland (I.e. no coastal assets, size of constituent towns and its prosperity) and has recently been successful in securing £25m from the Stronger Towns. Fund .*

To obtain a better understanding of the performance of Breckland's market towns, the study has benchmarked performance against five comparator towns. This includes a mix of geographically relevant competitor towns and more aspirational places that Breckland's towns could work towards through the Town Delivery Plan process. The following comparators have been selected:

+ **Southwell, Nottinghamshire:** *successful independent retail offering, and is a similar size and economic geography to Breckland's smaller market towns;*

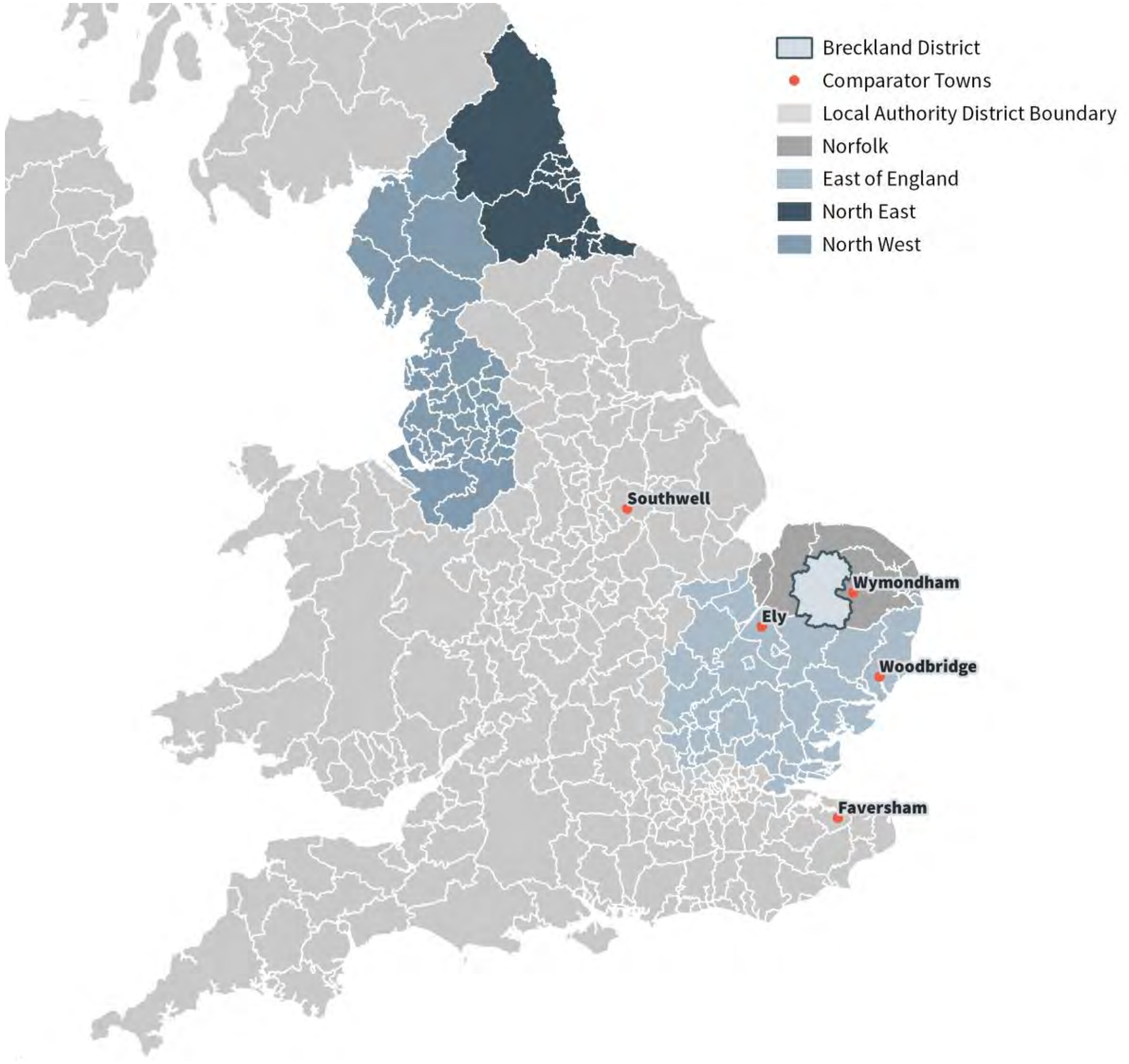
+ **Ely, Cambridgeshire:** *Larger market town in the East of England that is successful in its own right, but is also defined economically by its relationship and proximity to Cambridge;*

+ **Faversham, Kent:** *Similar sized market town that has become more prosperous in recent years;*

+ **Woodbridge, Suffolk:** *Successful small market town with strong independent offer which levers its natural capital; and,*

+ **Wymondham, Norfolk:** *Size, proximity to Breckland's market towns, and its location on the A11 means that it is a direct competitor to Breckland's market towns.*

Breckland's comparator areas



Executive **Summary (1)**

Breckland's economy

Breckland's economic growth has lagged behind the national and regional averages. Between 1998 and 2018, the district's economy grew by 101% to almost £2.4bn (13% of Norfolk's GVA). Growth is becoming increasingly concentrated amongst specific businesses and sectors. Whilst 10-year business growth was below the England average, employment growth was significantly higher (16% compared to 13% nationally.

COVID-19 will result in an 11% loss in Breckland's economic output. This results in a total loss of £268m for the district's economy. Accommodation and Food Services, the sector most exposed to social distancing and lockdown, has been the hardest hit – losing £44m in 2020.

The district retains business and employment specialisms across several sectors. Breckland hosts growing and highly-specialised business activity in Agriculture and Higher Tech Manufacturing.

Business and employment base exposed to macro-economic trends. Over the last decade, the number of retail businesses fell by 5%. Despite strong business growth in manufacturing and agriculture, employment fell – potentially as a result of technological advances, increased efficiency and automation in these sectors

Economic participation is very high indicating a resilient labour market which can underpin the district's rapid post-COVID recovery.

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Breckland's people

Breckland has an ageing but growing population. 57% of Breckland's residents are working age compared to 62% of England. Over the past 20 years, the district's population has grown by 18% which is higher than the England (15%) and the Norfolk (15%) averages.

The district is home to a large proportion of migrants reflecting the district's agricultural heritage and sector mix. Despite this, international migration from the EU fell by 71% in 2020 which has potentially significant impacts on Breckland's key sectors and labour market.

Breckland's residents are less well qualified than the national average. Just over a quarter (27%) of residents are educated to degree-level (NVQ 4+) compared to the England average of 40%.

Social mobility in Breckland is very low. Breckland ranks 306th out of 346 local authorities nationally.

Resident health outcomes are poor. Over two thirds (68%) of residents are either obese or overweight compared to 62% of people nationally.

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Breckland's places

Access to Education, Skills and Training is the biggest driver of deprivation in Breckland. 54% of neighbourhoods within Breckland fall within the top 30% most deprived nationally in terms of education, skills and training.

Breckland's digital infrastructure and connectivity currently lags behind national averages.

Breckland's commercial property market is dominated by low quality industrial space. Whilst average rental prices are lower than the national and regional averages, space is frequently low quality.

Rising retail vacancies represent a key threat to economic vitality and place perception. High street vacancy rates are highest in Watton (14%) and Thetford (12%).

Whilst house prices are low, affordability remains a challenge for many of Breckland's residents. Over the course of the COVID-19 pandemic, house prices have risen by 10% - meaning the district is becoming increasingly unaffordable for many of Breckland's residents.

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Making the case for Breckland

There is a clear need to 'level up' Breckland:

1. Social mobility and educational attainment are amongst the worst in the country.
2. Demographic and health challenges are likely to limit the district's competitiveness.
3. Severe local economic and health impacts from the COVID-19 pandemic.
4. Weak long-term economic resilience challenges due to macro economic factors threatening Breckland's employment and business base
5. Insufficient transport and digital infrastructure constraining growth and opportunity
6. Struggling town centres requiring investment and diversification

But also an unprecedented opportunity for growth and renewal:

1. Housing and population growth to bring new opportunities for Breckland's residents and businesses
2. Building on strong economic foundations such as low unemployment and nationally significant sector specialisms
3. An opportunity to create market towns fit for the 21st century by championing strengths and addressing structural barriers to growth

Executive **Summary (2)**

Implications for Breckland's Economy

- Need to increase value of economy by harnessing benefits of being close to the Cambridge-Norwich Tech Corridor, Logistics Triangle, Oxford-Cambridge Arc and two major cities
- Investment is required in business infrastructure to make it a more business friendly location
- This includes consideration of incubator and grow-on space to support the range of start-ups locating in Breckland's market towns
- Need to think creatively about the future of town centres to manage the decline of retail. Several of Breckland's market towns retain business specialisms in retail.

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Implications for Breckland's people

- Need to balance attracting working-aged residents to live and work in Breckland's market towns with ensuring service provision meets local needs
- Accommodating housing growth within market towns will be an important component of Breckland's future vitality
- Providing social and green infrastructure to support happy, healthy lives is integral for place prosperity
- Targeted investment in deprived areas will help narrow inequality
- Investment is needed in skills and education to address the district's low-skill, low wage economy

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Implications for Breckland's places

- Investment is needed in digital infrastructure to increase the district's competitiveness as business destination
- Breckland's lack of public transport and active travel connectivity needs addressing to support residents and businesses
- New high quality commercial space could help attract high value economic activity to the area
- Tailored policy responses are required in each market town to address rising retail vacancies and falling footfall
- Affordable housing provision is important to reduce brain drain

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Priority Areas for Investment

- Skills and education
- Town centre regeneration and diversification
- Public transport and active travel
- Digital infrastructure
- Deprivation and inclusion
- Housing and affordable housing
- Social and green infrastructure
- High quality commercial space
- Town centre activation

Executive Summary (3)

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Strengths

- Wide range of natural, cultural, heritage and leisure assets
- Highly attractive, liveable and safe place to live and do business
- Unemployment and economic inactivity are comparatively low
- Five attractive market towns that represent the urban form of tomorrow
- Steady economic mix that has been more resilient to COVID-19 than other locations
- Proximity to the logistics triangle and several globally-significant ports
- Position on the Norwich-Cambridge Tech Corridor and location on the edge of the Oxford-Cambridge Arc

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Weaknesses

- Economic growth has lagged behind the region and national averages
- The economy is dominated by low-wage and low productivity industries
- Skills levels are below the national average and there are pockets of significant deprivation
- Social mobility is poor for people living and growing up in the district
- Digital infrastructure and connectivity lags behind national averages
- Public transport and active travel options are limited
- The commercial property market is constrained and dominated by low quality stock
- House prices are comparatively low but are not affordable based on average local wages
- Lack of flexible workspace to support small, start-up and scale up businesses
- Retail vacancies are rising and COVID-19 has reduced footfall in town centres

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Opportunities

- COVID-19 has shifted working patterns which has made places like Breckland more attractive to people and businesses looking to move out of costly urban areas
- Major opportunities to harness benefits of being close to or part of the Cambridge-Norwich Tech Corridor, Logistics Triangle, Oxford-Cambridge Arc and two major cities
- Population and housing growth has been rapid and provided enhanced human capital that can help address economic and social challenges
- Availability of highly attractive land that can be used to meet demand for housing and commercial space
- High demand for high quality logistics and warehousing space in strategic locations like the A11 corridor
- Demand expected to increase for flexible workspaces close to where people live
- Government interested in investing in places that support their ‘levelling up’ agenda

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Threats

- Brain drain of educated young people expected to continue
- Local economy relies on migrant labour from the EU which is under threat from Brexit and COVID-19
- Macro-economic shifts to the retail sector threatens the vitality of the five market towns
- COVID-19 is expected to exacerbate issues for deprived and marginal groups
- Breckland’s market towns and economy could be left behind if they do not adapt to macro-economic trends related to retail, working patterns and commercial property
- Other districts may harness the locational benefits of being close to the Cambridge-Norwich Tech Corridor and Oxford-Cambridge Arc ahead of Breckland leaving fewer opportunities for the district
- COVID-19 may make people more reluctant to return to town centres in their current form
- Public sector funding cuts could threaten the region’s natural, cultural, heritage and leisure assets which are already suffering from a lack of investment

Executive **Summary (4)**

The evidence presented in this document illustrates that while Breckland is unique it has characteristics in common with many predominantly rural districts. Its issues, for example, resonate with rural communities in the West Country and North Wales despite its closer proximity to major economic hubs such as Norwich and Cambridge.

Even though Breckland benefits from natural assets (e.g. Pingo Trail), important heritage assets (e.g. Thetford Hill Fort) and highly attractive market towns it faces a range of significant economic, social and environmental challenges.

For example, the district's economy has grown comparatively slowly over the last two decades and is characterised by low wage and low productivity sectors. Levels of enterprise, entrepreneurialism and innovation are also poor. There are several barriers holding back economic performance, business investment and inward investment – these include:

- A low skilled resident population and tight labour market;
- A highly constrained commercial property market dominated by low quality space;
- A lack of dedicated space for small businesses, start ups and scale ups;
- Poor public transport and active travel options to connect residents and places of work; and,
- Significant gaps in access to adequate digital connectivity.

The district also faces a range of social challenges that are linked to these challenges. These impact the wellbeing of residents and the provision of sustainable public services and relate to issues like the district's ageing population, access to education, social mobility and obesity.

Perhaps the greatest social challenge is that prospects for those living and growing up in deprived areas are poor. Evidence related to social mobility, access to Higher Education and housing affordability show that it is difficult for deprived young people growing up in the area to access opportunities available to people in areas with higher social mobility.

The economic growth that has been observed over the last two decades has not addressed these deeply embedded social issues which provides impetus for direct and targeted intervention.

Unlike many rural areas, however, Breckland's strategic position and competitive advantages leave it uniquely placed to deliver growth that can help tackle many of these economic and social challenges. Some of its most prominent advantages include:

- Its strategic position between Norwich and Cambridge, which are both important and growing economic hubs that are struggling to meet demand for housing, services and commercial space;
- The position of Thetford and Attleborough within the Cambridge-Norwich Tech Corridor and next to the A11 that defines it;
- The growing regional specialisms in high value industries, including agri-tech, life science, clean growth and ICT/Digital;
- The district's accessibility by the A11 and A47 to the UK's Logistics Triangle and ports at Great Yarmouth, Felixstowe and Lowestoft; and,
- The availability of desirable land for housing and commercial development.

These opportunities have not yet been harnessed due to a lack of investment in business infrastructure.

The challenge for Breckland Council and partners will be to capitalise on these economic opportunities while also ensuring that benefits spread to all communities. The region's strong and engaged public sector, which is focused on improving wellbeing for all residents, can support this and build community wealth.

Executive **Summary (5)**

The district's five market towns, which are Breckland's primary economic, social and community hubs, also provide opportunities to drive growth. Their size, assets, land and unique characteristics make them ideally placed to catalyse district-wide change.

As important economic centres they also require dedicated investment to help them adapt to macro-economic shifts relating to the retail, hospitality and leisure sector and the impact the COVID-19 has had on town centre footfall. Significant investment will be required to protect town centre economies and drive footfall in local centres.

The blend of strengths, weaknesses, opportunities and threats highlighted throughout this document present a compelling case for investing in Breckland. They demonstrate a clear need *and* opportunity to invest in the district and its five market towns.

Alongside the other evidence presented in this document, particularly related to the five market towns, these factors also provide a clear indication of the types of issues and interventions that the Town Delivery Plans and the overarching Breckland prospectus should prioritise addressing.

Following a thorough consideration of the evidence presented in this document, we believe that the most important areas for investment in Breckland are: (a) improving physical and digital infrastructure; (b) supporting business and enterprise; (c) tackling inclusion and skills deprivation; (d) regenerating and diversifying town centres; (e) enhancing culture and heritage; and, (f) activating and programming town centres. Further town-specific work will clarify these priorities as the programme progresses.

The five market towns are the ideal engines for growth and locations for this investment as discussed later in this report.

These priority investment areas are summarised in the table on the right. These could form a set of overarching objectives that the Breckland Prospectus and Town Delivery Plans aspire to deliver against and the golden thread that binds all the documents together. These will be refined through further consultation and engagement with stakeholders throughout the commission.

Example Priority Investment Areas	***Example Focus of Priority Areas***
Inclusion and Skills	Improving education and skills provision to tackle Breckland's entrenched education, skills and training deprivation, particularly in deprived areas which will be prioritised for community-focused investment
Town Centre Regeneration	Regenerating Breckland's town centres to help them adapt to changing macro-economic conditions and attract people and businesses looking to move away from major urban centres
Physical and Digital Infrastructure	Enhancing physical and digital connectivity to make it easier for Breckland's residents, visitors and workers to move, connect and do business
Business and Enterprise	Providing high quality business space and support to increase the size, value and diversity of Breckland's agriculture-led economy
Culture and Heritage	Enhancing, restoring and adding to Breckland's rich culture, heritage and leisure assets to meet the demands of a rapidly growing population and attract people to visit the area
Activation and Programming	Activating town centres through careful programming to attract locals, visitors and tourists and tackle Breckland's rising retail vacancies

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Policy Context

Local Policy **Context**

Document	Relevance to Town Delivery Plans

Breckland Local Plan (2019)	• Development to be centred on the following development hierarchy:
	  ◦ Key Settlements: Attleborough and Thetford – chosen due to Attleborough's planned housing growth and Thetford's role as the principal retail, service and employment centre for the south of the district.
	  ◦ Market Towns: Dereham, Swaffham and Watton.
	• Housing: A commitment to deliver 15,298 new homes between 2011 and 2036 (average of 612 per year). This follows the settlement hierarchy, with over 8,000 homes planned for Attleborough and Thetford, and just under 5,000 in the other market towns with the rest spread between the district's local service centres and rural areas.
	• Transport: all new development should minimize the need for travel, promote opportunities for sustainable transport modes and improve accessibility to services.
	• Economy and Employment: 64 hectares of employment land have been allocated. The plan recommends that new provision of office space follows an enterprise centre type model, with small units for small and medium enterprises (SMEs) and local start-ups and shared workspace and networking opportunities. It is also recommended that any new office space is focused upon Breckland's town centres, benefiting from a more attractive working environment and range of facilities for staff.
	• Community: The creation, enhancement and expansion of community facilities will be supported where this would enhance the existing offer, benefit the local economy and be of a suitable scale and type for its location and in locations in close proximity to the area that they will serve.

Breckland Corporate Plan (2019-2023)	• Place priorities:
	  ◦ Use Market Town Initiative to ensure that the five market towns are attractive places that people want to visit with a vibrant economy while still meeting the needs of their communities.
	  ◦ Adopt a proactive approach to land management and maintenance of council owned land to ensure the Council gets best value from its land assets (the Breckland Asset Management Strategy is now expired).
	  ◦ Enable the effective planning and delivery of housing solutions to meet local needs and aspirations to ensure that residents including veterans have access to a range of housing options in the district.
	• Opportunity priorities:
	  ◦ Identify funding opportunities and deliver a clear 'open for business' approach.
	  ◦ Maximise benefits of the 'Cambridge Norwich Tech Corridor' to business growth.
	  ◦ Stimulate housing and employment growth with a particular focus on Thetford, Snetterton and Attleborough.
	  ◦ Develop an inward investment strategy.
	  ◦ Address barrier to better opportunities by lobbying NALEP and using the Breckland Community Reserve.

Regional Policy **Context**

Document	Relevance to Town Delivery Plans
New Anglia Draft Local Industrial Strategy	• Building on the SEP, New Anglia LEP is working with the Government to develop a Local Industrial Strategy for Norfolk and Suffolk. • This prioritises a sector focus on clean energy, agri-food and ICT and Digital/Creative • The strategy notes the importance of agri-food for rural economies but also notable concentrations in and around market towns (specifically Thetford)
New Anglia Economic Strategy for Norfolk and Suffolk	• Commitment to secure the dualling of the A47 between east Anglia and the Midlands as a key opportunity to improve job opportunities in Swaffham and Dereham
Norfolk Strategic Infrastructure Delivery Plan	• The 2020 version of the NSIDP reflects the latest update on all the collectively agreed strategic infrastructure projects (both newly added and existing projects) across the County. As fresh schemes emerge, a new section called Regeneration has been added to this year's plan to capture developing schemes that encompass a wide range of activities that have a profound regenerating and revitalising effect on an area and community and will require supporting infrastructure.

Norfolk & Suffolk COVID-19 Restart Plan	• Sets out specific local actions to support the COVID-19 recover. In Breckland, this focuses on:
	    • Working with business and partners to unlock the economy safely and positively, including enabling physical changes on high streets, and supporting upskilling where necessary.
	    • Following a twin-track approach to maximising survival and job retention, whilst also enabling growth and regrowth on the principles of 'building back better' and finding opportunity to create a more inclusive Breckland economy with the skills to grow.
	    • Mobilising the whole Council in response to the economic challenge, and ensure our regulatory powers are directed at enabling survival and promoting growth.

National Policy **Context**

Document	Relevance to Town Delivery Plans
National Infrastructure Strategy (2020)	• Priority to level up the UK's infrastructure committing to 'revitalising towns'. • This includes a commitment to enhancing digital connectivity through £5 billion to support gigabit broadband rollout, a Shared Rural Network extending 4G mobile, and £250 million to ensure resilient and secure 5G networks • £5bn for bus services and cycle infrastructure, restoring rail services lost through the Beeching review, and record investment in strategic roads
10-point Plan for a Green Industrial Revolution	• Government priorities relevant to market towns include accelerating the shift to zero emission vehicles. This will require enabling infrastructure in town centres, residential areas and business parks and the government will invest £1.3bn to accelerate the roll out of charging infrastructure • Prioritising investment in green public transports and interventions that enhance walking and cycling • The proximity of market towns to Breckland's rich natural capital is a major competitive advantage. Government commits to safeguard cherished landscapes, restore habitats for wildlife in order to combat biodiversity loss and adapt to climate change, all whilst creating green jobs.
Central Government Regeneration funding	• Community Renewal Fund: provide local areas across the UK with access to £220 million of additional funding as they prepare for the UK Shared Prosperity Fund due to launch in 2022 • Plan for Jobs: offering tailored support to help people find work, including through Youth Hubs, Restart, and Kickstart • Levelling Up Fund: the most significant funding in terms of scale (£4bn) and scope. This will seek to address socio-economic imbalances nationally through targeted regeneration investment through a broad range of investment typologies

Left out: Government regeneration funding in Norfolk

In recent years, only Norfolk's coastal towns have received regeneration funding from the Future High Street Fund and Towns Fund. Similarly, only Great Yarmouth and King's Lynn and West Norfolk received Priority 1 status for the Levelling Up Fund. As a result, the Evidence Encyclopedia has articulated a strong investment case centered on levelling up need and Breckland's unique offer to UK PLC.

Locations of recent government regeneration funding

Source: .gov.uk

Aligning with **government methodologies**

Responding to government funding priorities…

The government has published its methodology note for prioritizing places to receive the first rounds of Levelling up and Community Renewal funding.

This evidence base has been designed to enable Breckland District Council officers and its partners to quickly mobilise to respond to calls for projects and bids.

Although this socio-economic baseline is significantly broader in scale and scope than the government's prioritization assessment, the tables to the right show where the data to respond to the government's prioritization framework can be found within the encyclopedia.

LUF Prioritisation methodology

	Category	Metric	Page
Levelling Up Fund Prioritisation	Need for economic recovery and growth	Productivity (GVA)	27
		Unemployment (16+ unemployment estimates)	39
		Skills (Proportion with no qualifications)	50
	Need for improved transport connectivity	Journey times to employment centres	66
	Need for regeneration	Commercial vacancy	73-74

Community Renewal Fund Prioritisation methodology

	Characteristic	Page
CRF	Productivity	27
	Household Income	24
	Skills	50
	Unemployment rate	39
	Population density	21

1.3

Breckland’s economic geography

Economic **context**

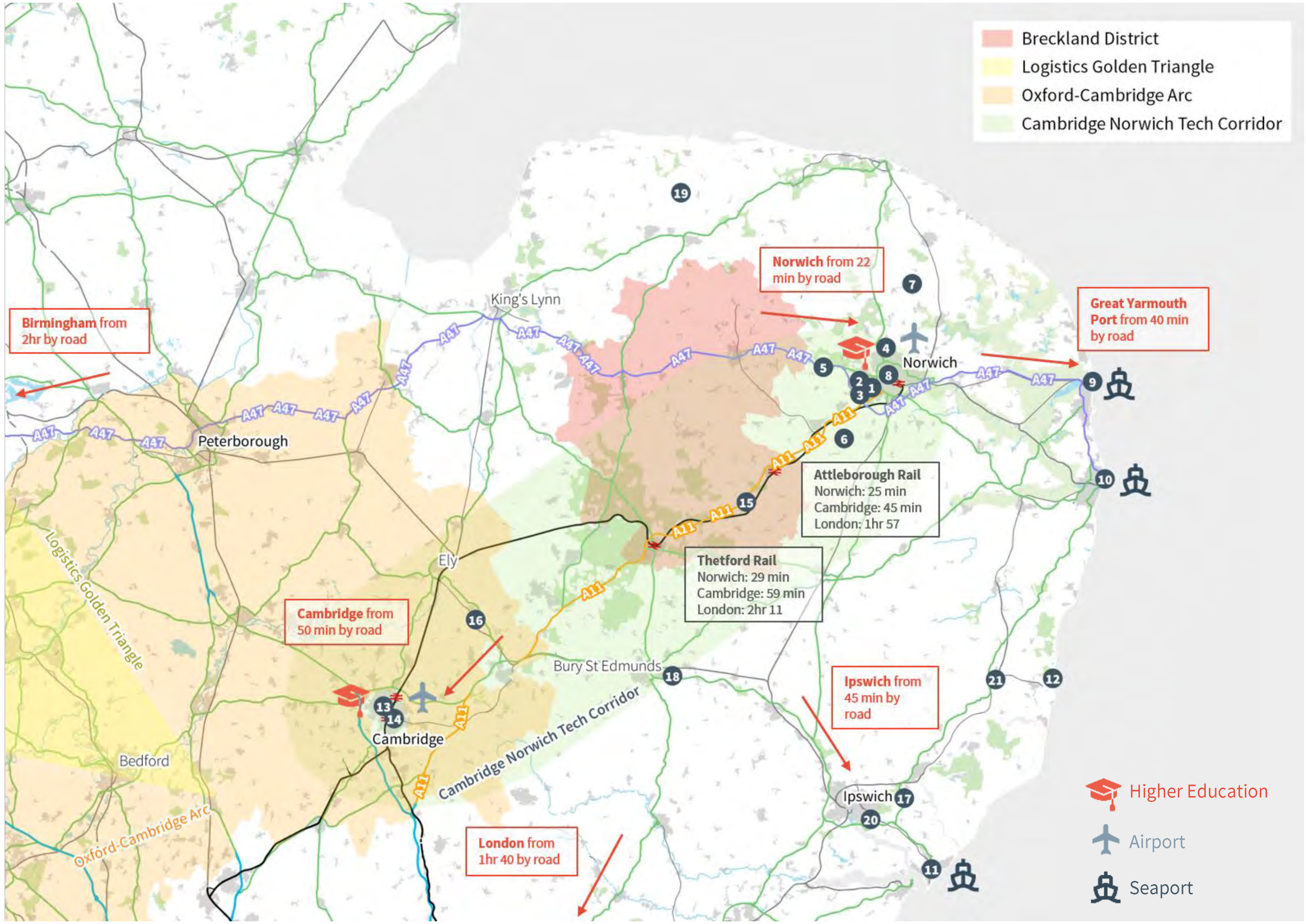
Located at the heart of the east of England's growth opportunity...

Breckland is located on the eastern fringe of the Oxford Cambridge Arc, between the east of England's most significant high-value growth cities of Norwich and Cambridge. Two of Breckland's market towns, Attleborough and Thetford, are located on the A11 'Cambridge Norwich Tech Corridor' and maximising the benefits of this will be integral to the growth, diversification and evolution of the district's economy. To the north, the A47 provides the key artery which links Dereham and Swaffham with Norwich, King's Lynn, Peterborough and Great Yarmouth.

Although many assets are outside of the district's boundaries, there are numerous regionally significant resources which will influence the vitality and prosperity of Breckland's people and places. This includes three universities, high-quality and sector-specific business parks and easy access to three of the UK's busiest ports.

1. University of East Anglia
2. Norwich Research Park
3. Norfolk and Norwich University Hospital
4. Norwich Airport
5. Food Enterprise Park
6. Hethel Engineering Centre
7. Scottow Enterprise Park
8. City College Norwich
9. Great Yarmouth Port
10. Lowestoft Port
11. Felixstowe Port
12. Sizewell C
13. University of Cambridge
14. Anglia Ruskin University
15. Snetterton Business Park
16. NIAB Eastern Agri-Tech Innovation Hub
17. Adastral Park
18. Suffolk Park
19. Egmere Business Zone
20. Futura Park
21. Saxmundham Creative Industries Hub

Breckland economic context map



Rationale for **market town focus**

Hubs of population:

1

52% of Breckland's population live within its five main towns

Breckland's economic drivers:

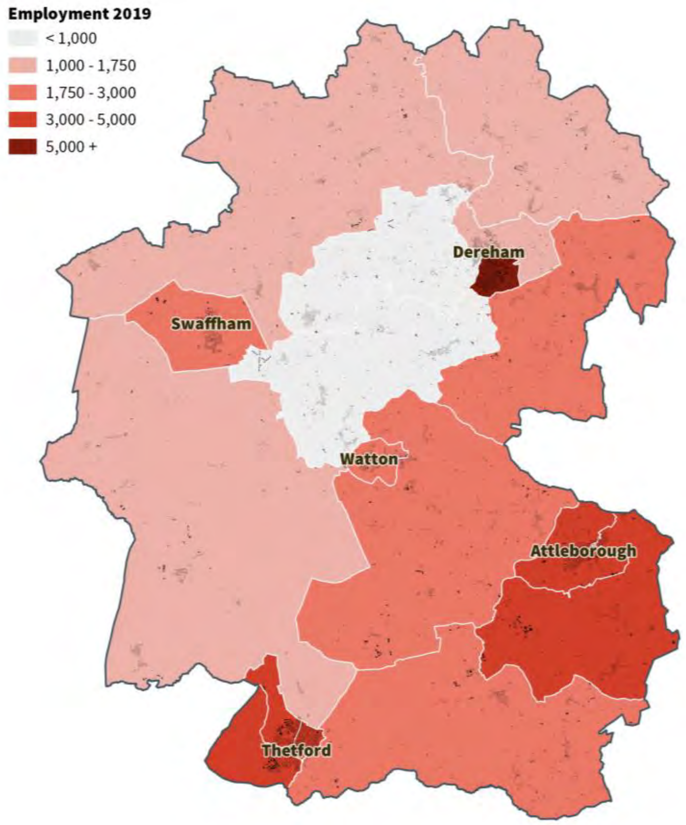
2

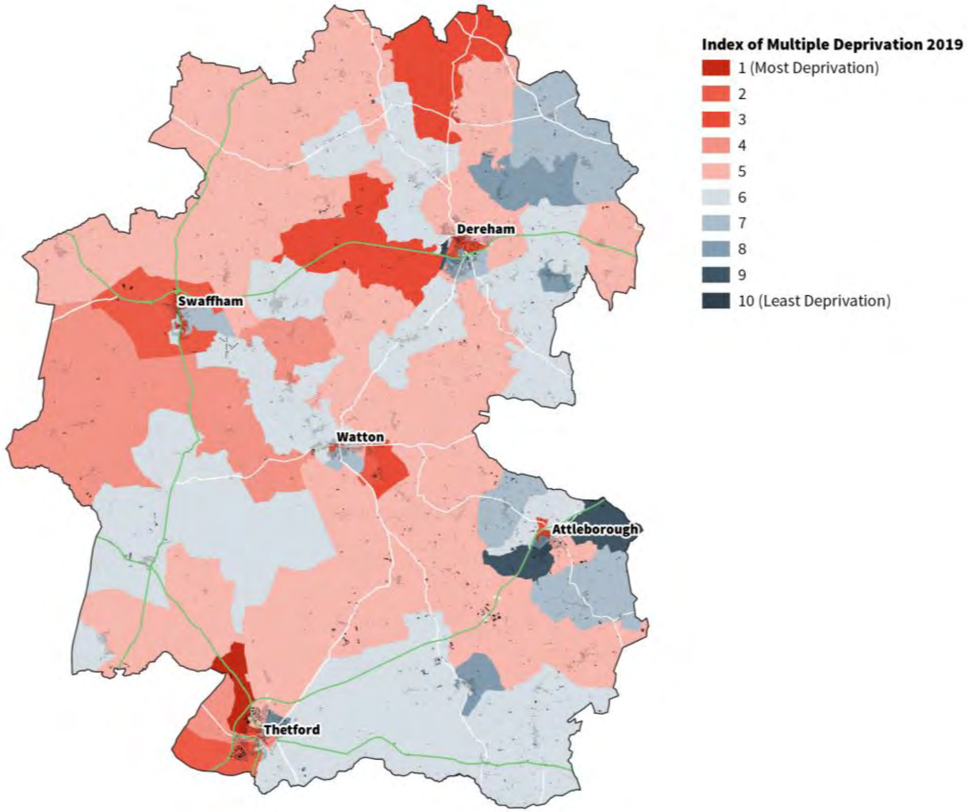
59% of the district's jobs are hosted within its five main towns

A need for levelling up:

3

Severe deprivation is primarily concentrated within towns





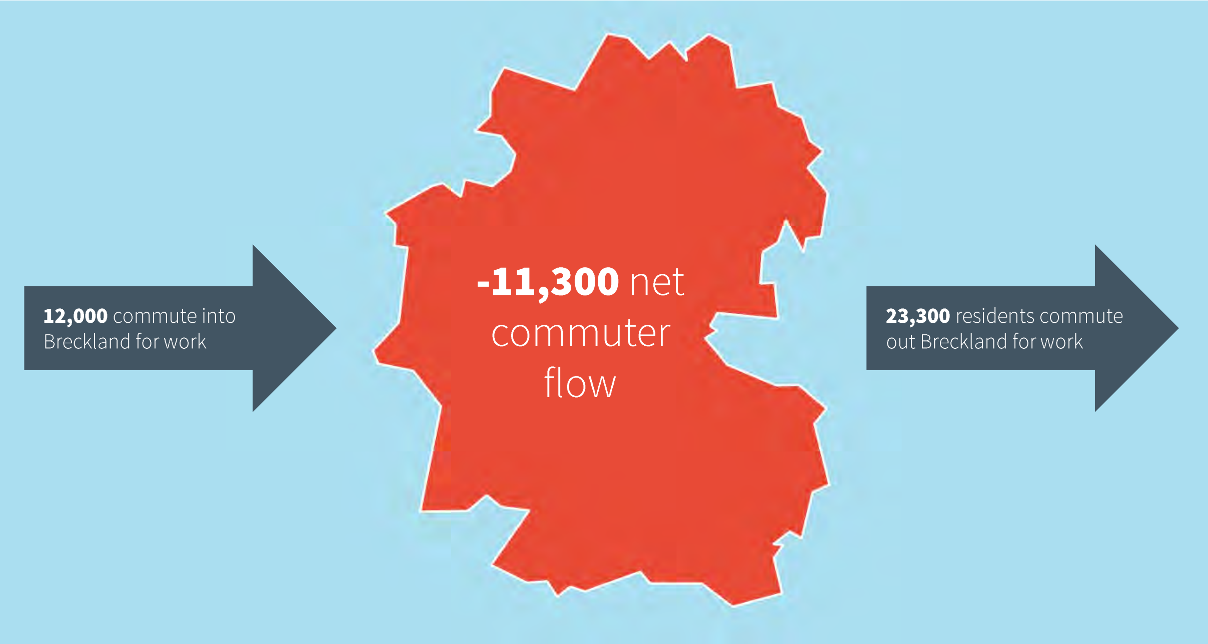
Source: ONS Mid Year Population Estimates, BRES, Ministry of Housing, Communities and Local Government

Commuting **patterns**

Breckland is a net exporter of labour...

According to the most recently available Census (2011) around 12,000 people commute into Breckland for work. Of those commuting into Breckland from other districts, around 8,000 (or 64% of all commuters) commute in from other parts of Norfolk with South Norfolk (2,700 people) and King's Lynn and West Norfolk (1,700) and Norwich (1,500) ranking highest. Around 23,300 people commute out of Breckland for work, of which around 15,000 (or 64%) commuted to the rest of Norfolk with the highest-ranking destinations including Norwich (4,600), South Norfolk (4,200) and King's Lynn and West Norfolk (2,500). There is potential to retain these workers locally by providing enhanced employment and commercial space opportunities within the district.

Breckland's net commuting flows



Where Breckland's outward employment migration is going: top 10 commuting outflow destinations

	Total Outflow	% of commuting outflow	Net Outflow
Norwich	4628	20%	-3,124
South Norfolk	4201	18%	-1,504
King's Lynn and West Norfolk	2549	11%	-888
Forest Heath	2404	10%	-1,217
St Edmundsbury	2303	10%	-1,466
Broadland	1871	8%	-714
North Norfolk	1338	6%	-623
Mid Suffolk	579	3%	-114
Cambridge	244	1%	-193
South Cambridgeshire	217	1%	-176

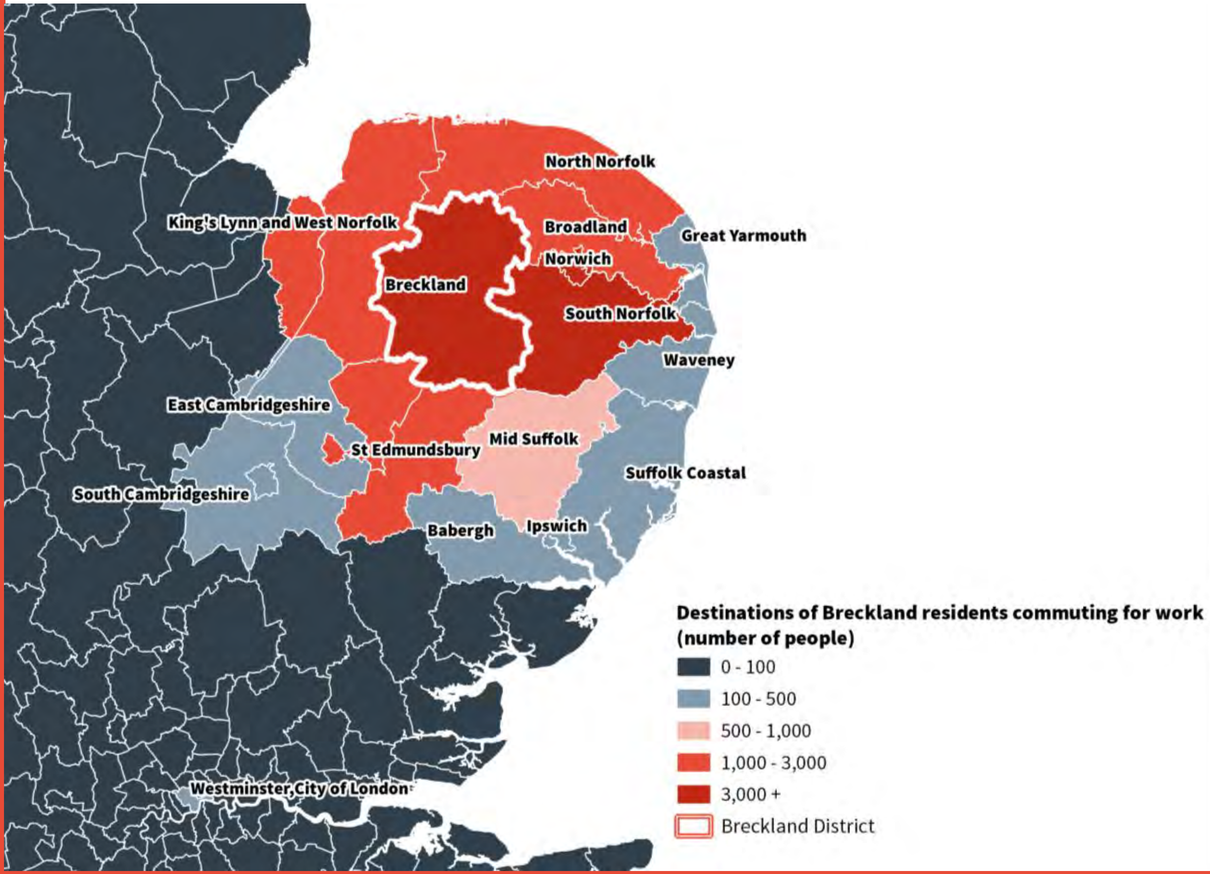
Source: 2011 Census

Mapping **Breckland's commuting**

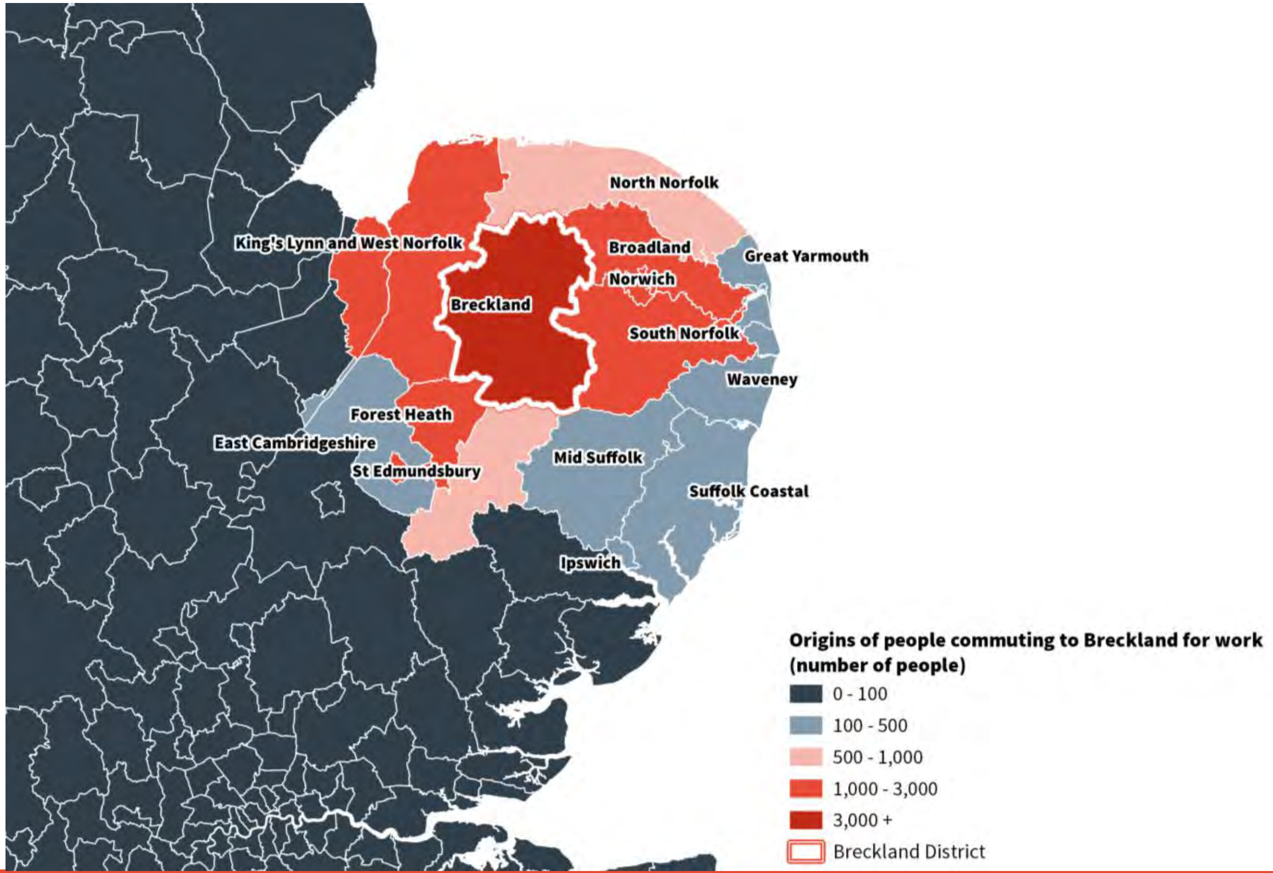
Most of Breckland's exported labour is contained within Norfolk...

Despite a significant net outflow from the district, over X% of this is to bordering local authorities in Norfolk. This shows that there is relatively high levels of leakage, and a significant proportion of residents are travelling to Norwich. 4,628 residents travel to Norwich for work, suggesting that there is potentially a significant skilled labour pool that could be retained locally within Breckland's market towns and employment areas to drive local economic growth.

Employment destinations for Breckland's residents



Breckland's labour pool

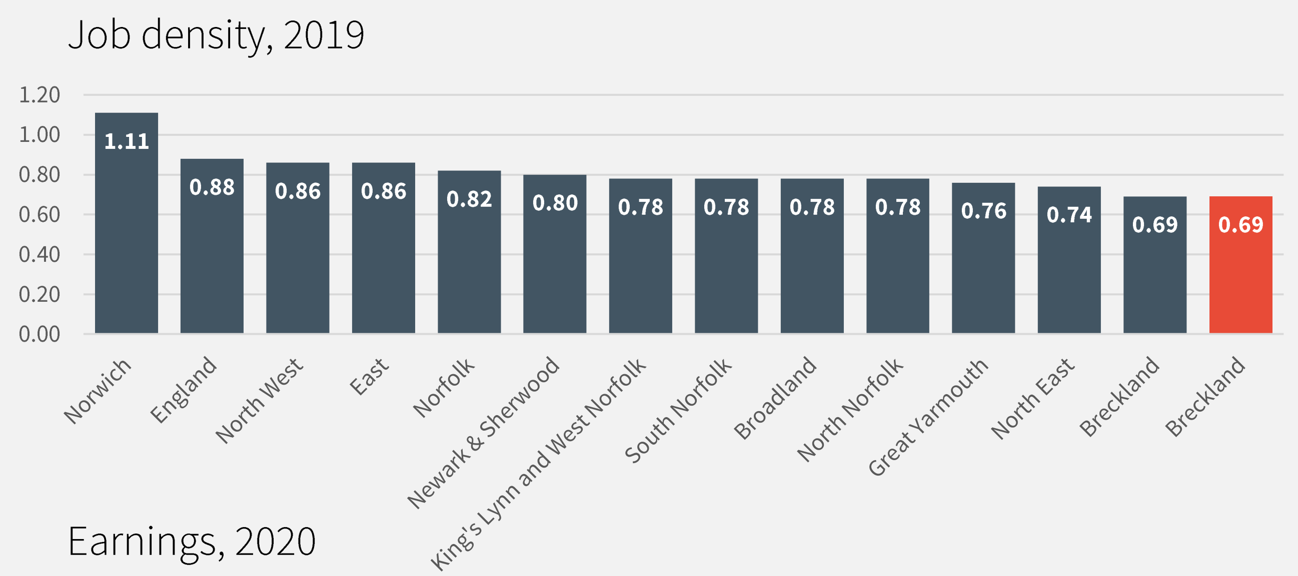


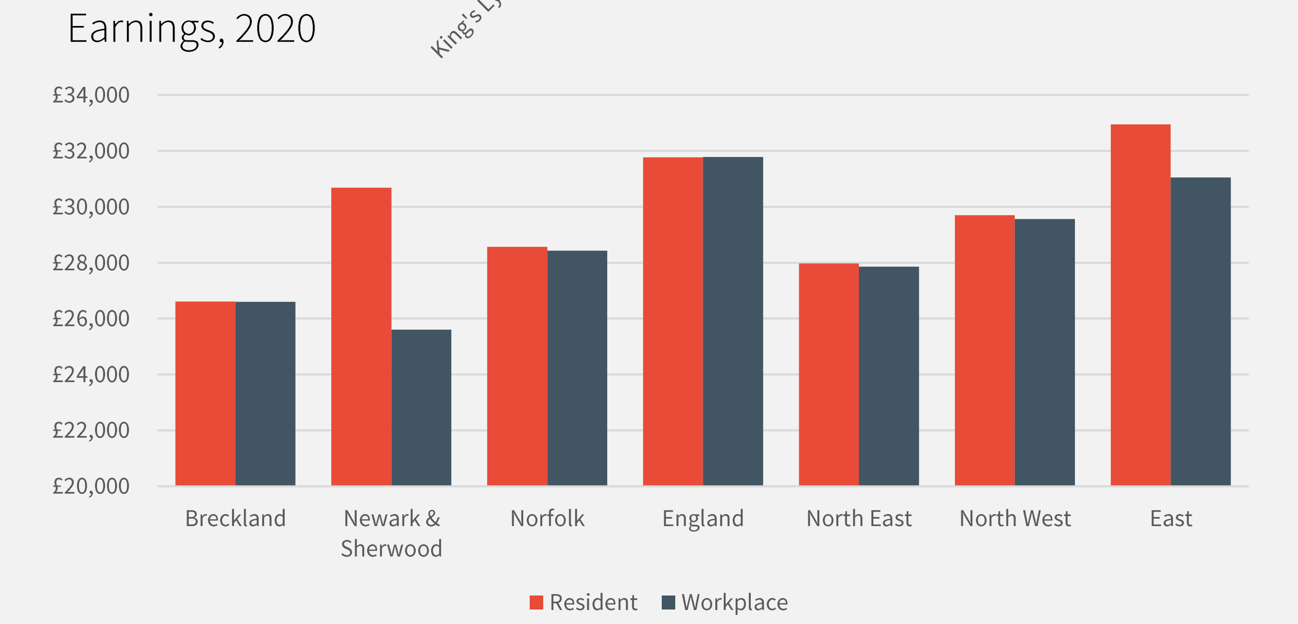
Breckland's **job density and earnings**

Labour market characterised by limited local opportunities and low earnings...

Job density is defined as the number of jobs in an area divided by the resident population aged 16-64 in that area. For example, a job density of 1.0 would mean that there is one job for every resident aged 16-64. Breckland has the lowest job density out of all comparator areas – with only 0.69 jobs per working-age resident. Limited opportunities within the district may explain why Breckland is a net exporter of labour with many residents needing to travel to their places of work.

Both resident (£26,613) and workplace (£26,597) earnings are notably lower than the national average of £31,800 per year. However, there are signs of improvement with long term annual wage growth of 26% in both resident and workplace earnings since 2010 which is faster than Norfolk (23%) and England (21%) over the same period.





Source: ONS Mid-Year Population estimates, BRES, ASHE

1.4

Breckland's Economy

Economy **Summary**

Breckland's economy

Breckland's economic growth has lagged behind the national and regional averages. Between 1998 and 2018, the district's economy grew by 101% to almost £2.4bn (13% of Norfolk's GVA) compared to 115% in England and 111% for the East of England.

Growth is becoming increasingly concentrated amongst specific businesses and sectors. Whilst 10-year business growth was below the England average, employment growth was significantly higher (16% compared to 13% nationally.

Manufacturing is a defining sector for the district's prosperity and productivity contributing 17% of total GVA. Despite this, office-based roles in Administrative and Professional Services have the fastest growing productivity.

COVID-19 will result in an 11% loss in Breckland's economic output. This results in a total loss of £268m from the district's economy. Accommodation and Food Services, the sector most exposed to social distancing and lockdown, has been the hardest hit – losing £44m in 2020.

Agriculture, Construction, and Financial and Professional Services are the district's largest sectors in terms of busines numbers. Together, these sectors account for 42% of Breckland's businesses.

The district has business and employment specialisms across several sectors. Breckland hosts growing and highly-specialised business activity in Agriculture and Higher Tech Manufacturing

Business and employment base exposed to macro-economic trends. Over the last decade, the number of retail businesses fell by 5%. Despite strong business growth in manufacturing and agriculture, employment fell – potentially as a result of technological advances, increased efficiency and automation in these sectors

Economic participation is very high indicating a resilient labour market which can underpin the district's rapid post-COVID recovery. Although the number of benefit claimants has grown since the start of the pandemic, increases have been much more modest than the national average and uptake of government support has been lower.

Policy implications for Breckland's market towns

Nationally significant employment specialisms within Breckland's market towns. Several market towns are highly specialised in Food Manufacturing. Agri-food represents a key sector for Norfolk and the East of England with Agri-food representing a priority sector in New Anglia LEP's Local Industrial Strategy.

The visible effects of the economic impacts of COVID-19 will be felt most acutely in market towns. Several of Breckland's market towns retain business specialisms in retail. There is a risk that the pandemic could accelerate wider economic trends that pre-date the pandemic such as the growth of online shopping.

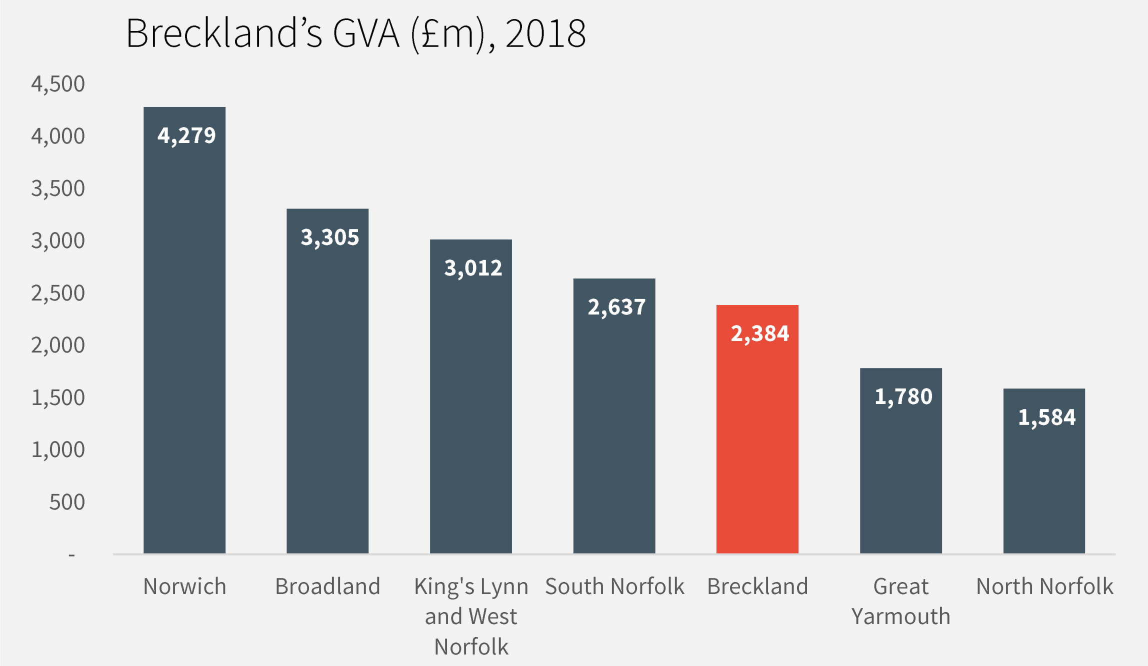
Business specialisms currently do not reflect the growth opportunity of Breckland's market towns. Like many market towns, local business specialisms include Public Administration and Retail. However, there is an opportunity for market towns to leverage their unique position on the A11 Corridor - and proximity to the East of England's primary productivity drivers - to support the growth of high-potential businesses.

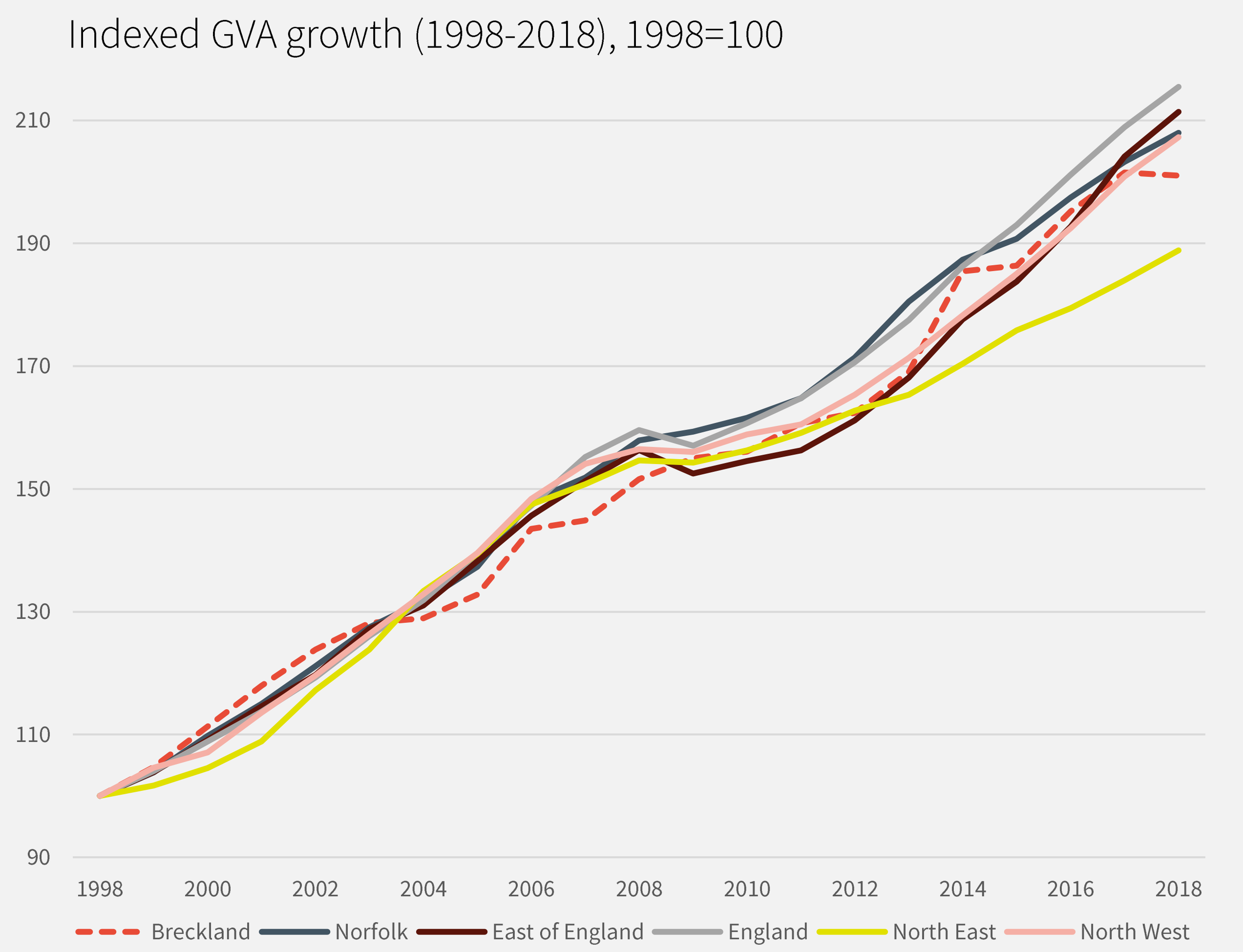
Market towns are the location of choice for Breckland's start-ups. 60% of new businesses set up across the district since 2018 have chosen to locate in market towns. Providing the appropriate commercial space and business support to incubate and grow these businesses will be integral to the future success and vitality of the Breckland's market towns.

Headline **economic performance**

Economic growth has lagged behind the England average…

Breckland contributed around £2.4 billion to the economy in 2018, equivalent to 13% of Norfolk's GVA. Whilst Breckland's productivity growth has been slower than that for Norfolk and the East of England over the long term, the district has doubled its GVA since 1998 from £1.2 bn.





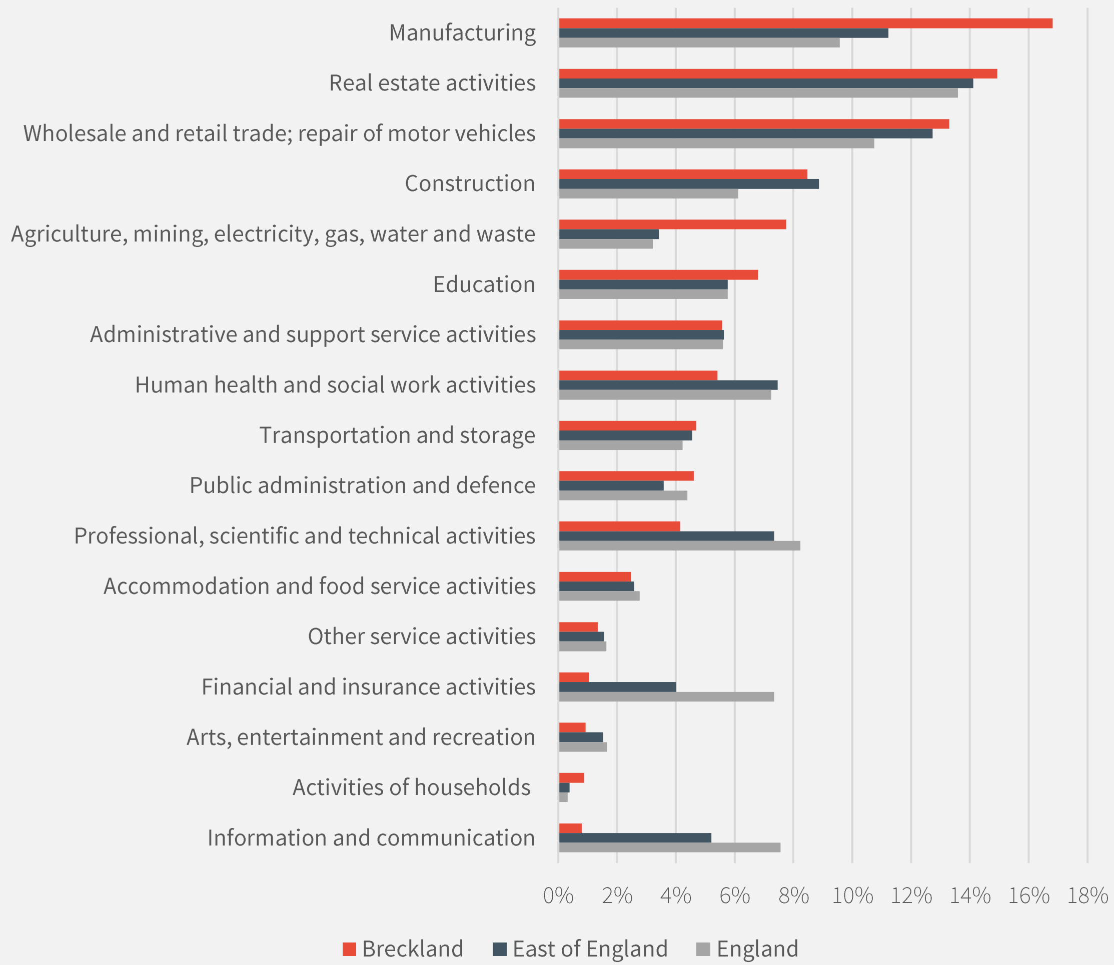
Source: ONS Regional GVA by industry (2018)

Economic output **by sector**

Manufacturing and is integral to Breckland's economy but fastest growth is in office-based roles…

Manufacturing is the largest contributor to GVA for Breckland, equivalent to £401m and accounting for 17% of total GVA in 2018. Other important sectors include Real Estate, Wholesale and Construction. Over the past decade, office-based roles such as Admin and Support Services (+87%) and Professional Services (+62%) have experienced the strongest productivity growth. Some of Breckland's largest contributors (specifically Real Estate and Manufacturing) have experienced weaker growth (+21% and +7% respectively). Agriculture is also a key sector for the district – contributing 8% of Breckland's GVA in 2018 compared to only 3% in England as a whole. Breckland's agricultural sector has also experienced output growth well above the national average – growing by 50% over the last 10 years, compared with only 19% nationally.

GVA by sector, 2018



GVA growth by sector, 2008-2018

Source: ONS Regional GVA by industry (2019)

COVID-19 impact: **economic output (1)**

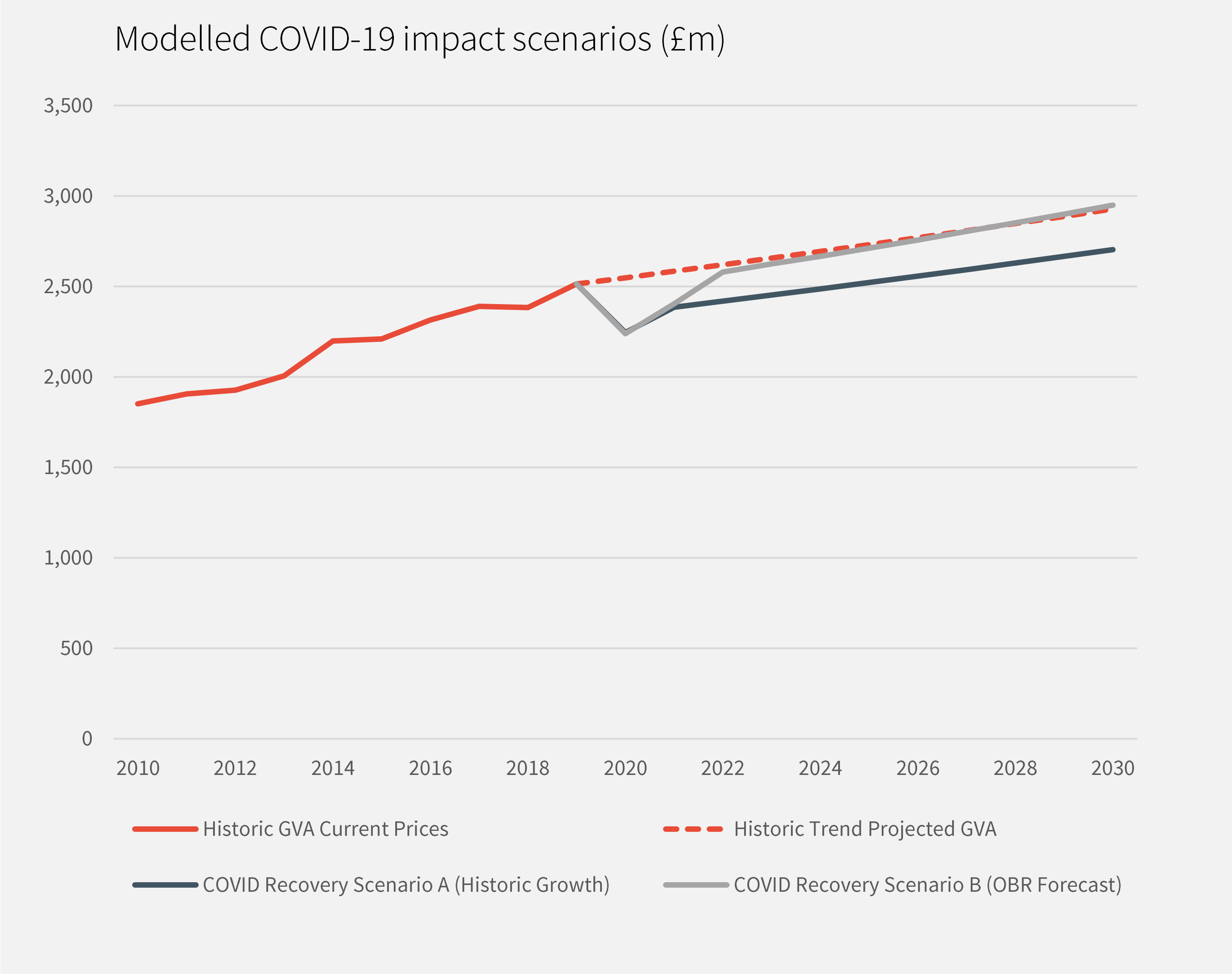
Breckland's economic output fell by an estimated 11% due to the impacts of COVID-19…

The latest Office of Budget Responsibility (OBR) sectoral impact estimates have been used to provide a central estimate of the impacts of COVID-19 on Breckland's economy.

It is estimated that Breckland's GVA was £2.5bn in 2019 and that £268m, or 11%, of that was lost during 2020 which is slightly higher than for the national economy.

The graph on the right shows two scenarios for recovery in Breckland - Scenario A is based on a historic 1.4% real growth rate per annum going forward whilst Scenario B is based on OBR's March growth forecast for the national economy. The OBR forecasts growth to be about 4% in 2021, 7% in 2022, then around 1.7% thereafter.

As the graph illustrates, Breckland needs to achieve a growth rate well above its historic rate to get back to its pre-COVID trajectory over the next decade.



Source: Hatch analysis of OBR Economic and Fiscal Outlook, March 2021 and ONS Regional GVA by industry (2019)

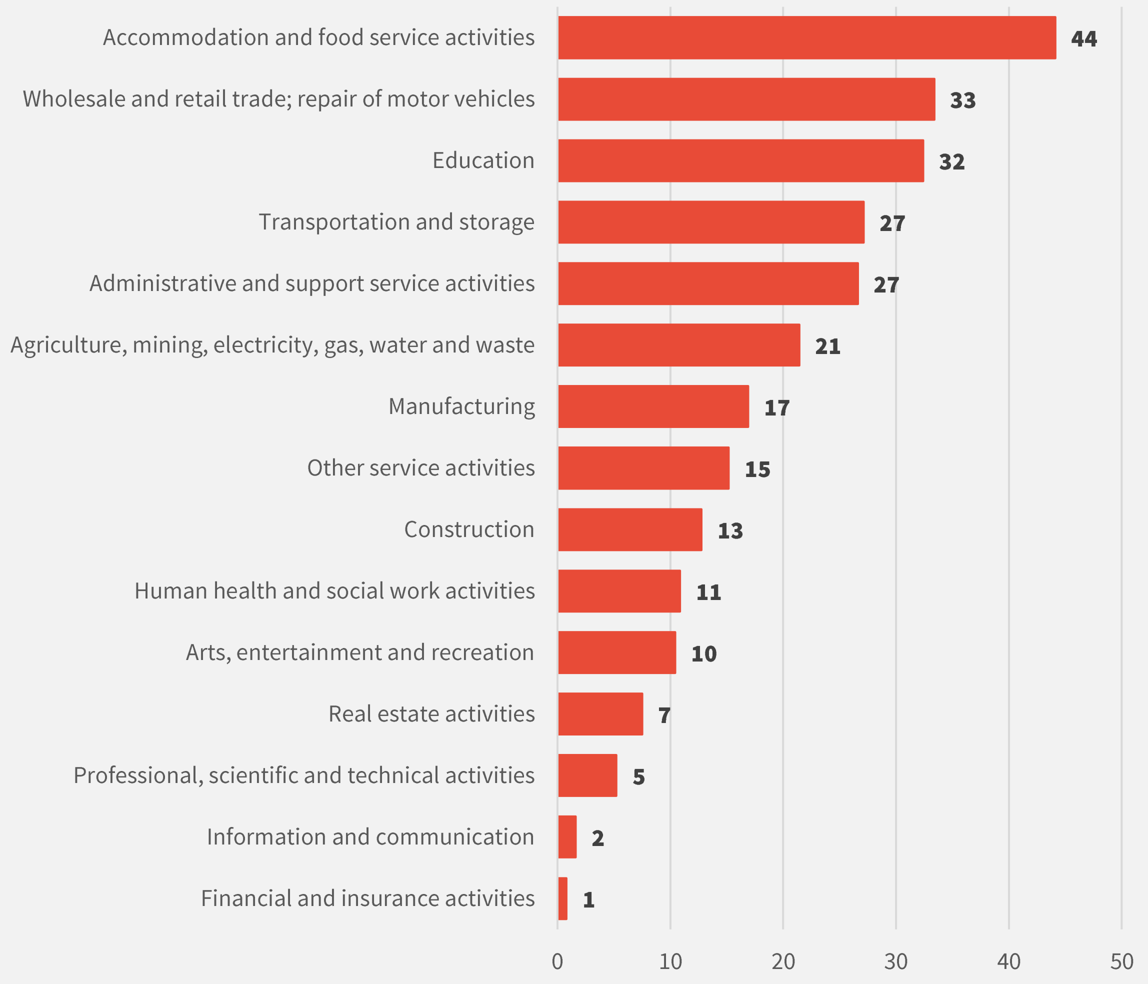
COVID-19 impact: **economic output (2)**

Losses were greatest for sectors most affected by social distancing and lockdown restrictions…

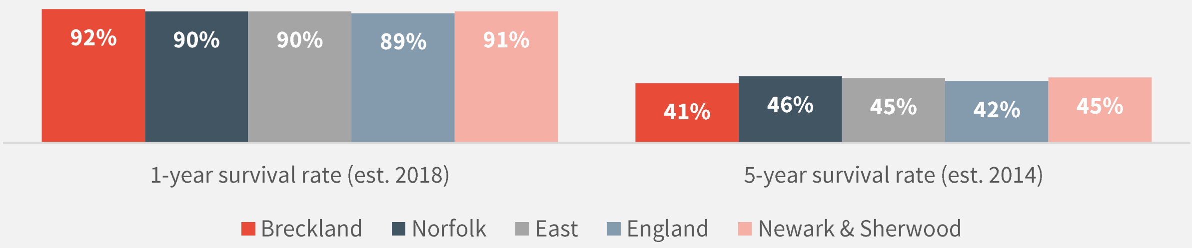
Applying the OBR Reference Scenario to Breckland's individual sectors shows that Accommodation and Food Services was the worst hit sector. The sector is modelled to have experienced an absolute loss of £44m, followed by Wholesale & Retail (-£33m) and Education (-£32m). This reflects the significant contribution these sectors make to the area's GVA (2%, 7% and 5%, respectively).

COVID-19 impacts could also exacerbate existing challenges in terms of business survival across the district. Before the pandemic, long-term business survival was low compared to other areas. Only 41% of Breckland businesses established in 2014 were still operating in 2019 compared to the Norfolk average of 46%. If Accommodation and Food Service businesses were unable to withstand the effects of the pandemic, this could affect the economic vitality of Breckland's market towns as these businesses are more likely to have a visible high street presence.

Breckland estimated GVA loss by sector (£m)



Breckland estimated GVA loss by sector (£m)



Source: Hatch analysis of OBR Economic and Fiscal Outlook, March 2021 and ONS Regional GVA by industry (2019)

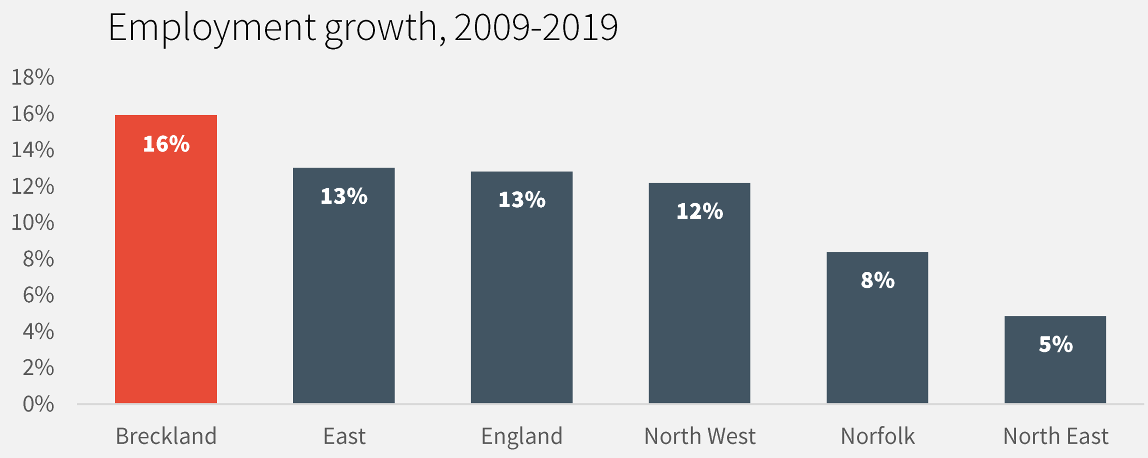
Breckland's **growth**

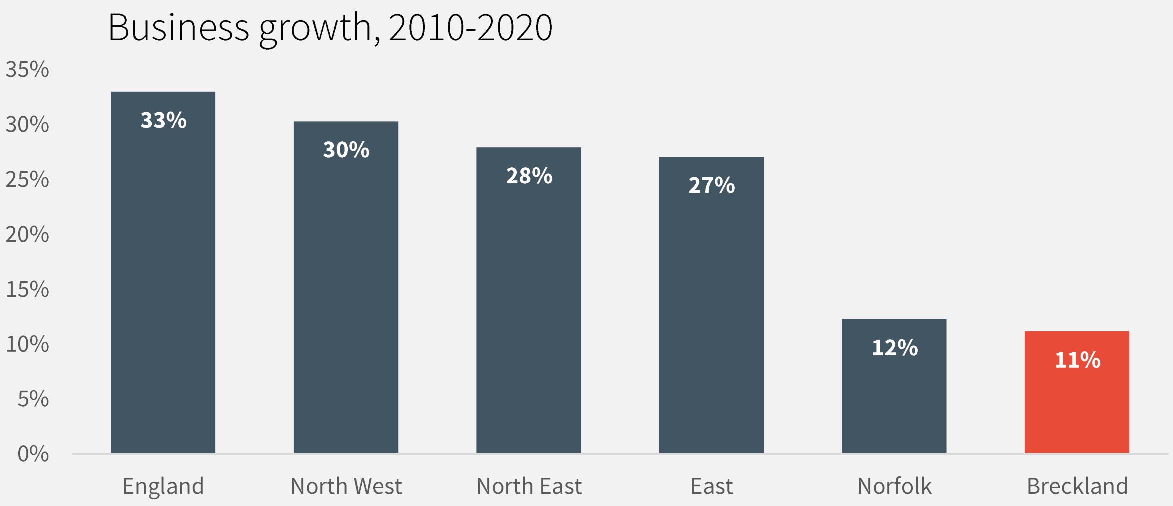
Weak business growth but with strong employment growth…

Over the last decade, Breckland's business base has grown by 510 businesses (or 11%) to 5,100 businesses in 2020. This is significantly lower than the regional (27%) and England (33%) averages.

Despite this, employment in Breckland has increased by 7,000 jobs (or 16%) over the last decade, with 51,000 people in employment in 2019 – this was notably higher than the East of England (+13%) and England (+13%) averages.

Wider evidence presented within this baseline suggests that this is likely to be driven by two principal factors: (1) anchor businesses expanding within the district, and (2) long-term business survival rates are low which is hindering overall business growth numbers.





Source: BRES, ONS Business Counts

Breckland's **sector profile**

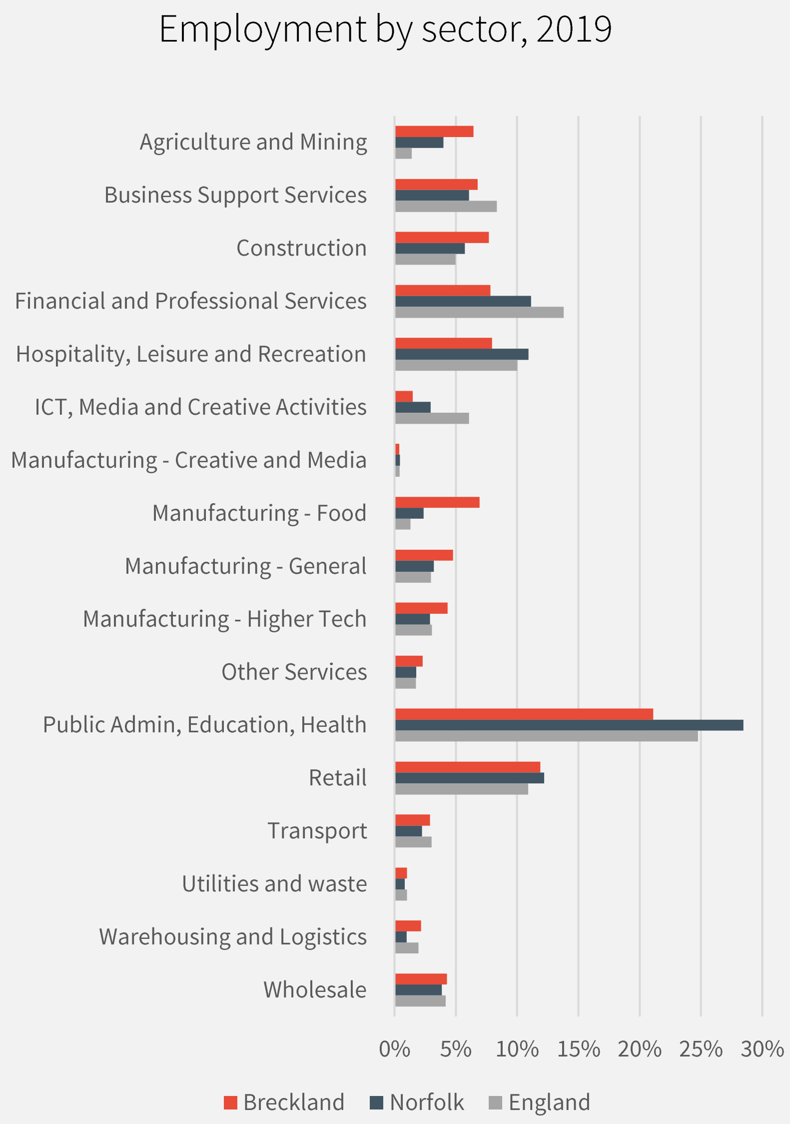
The area differences between employment and business composition…

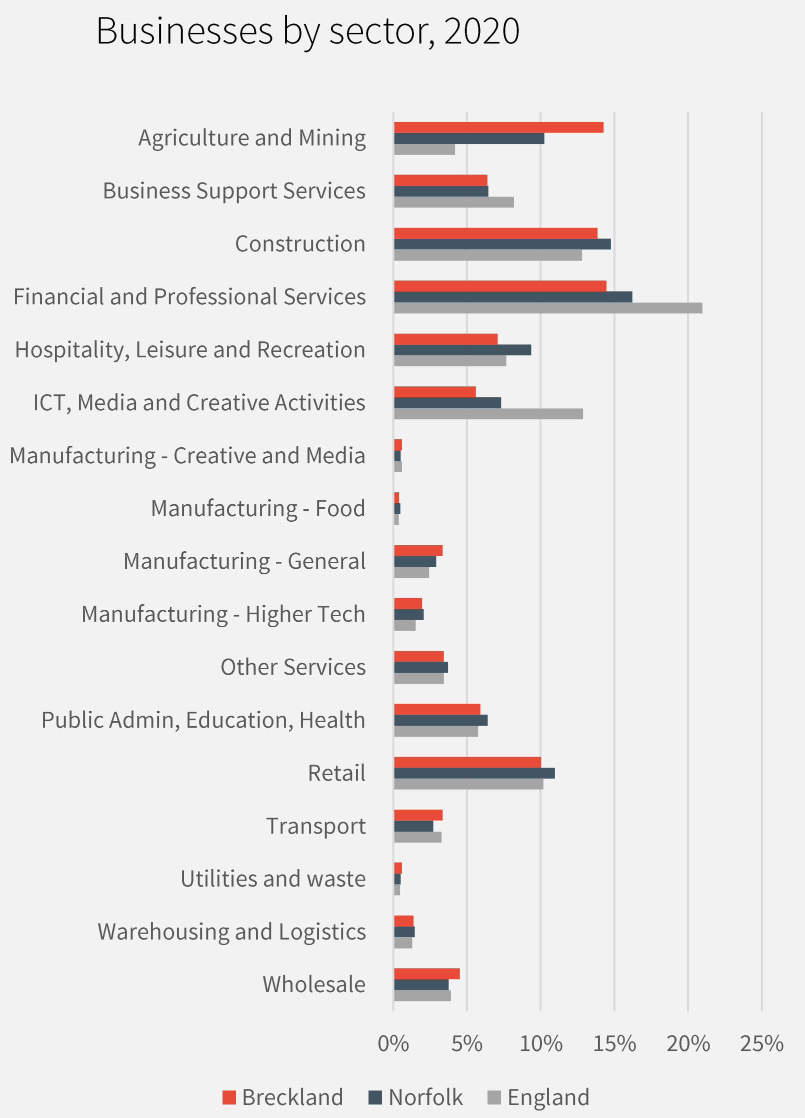
Although Agriculture, Financial and Professional Services and Construction account for 43% of Breckland's businesses, they only account for 22% of the district's total employment.

This indicates that there are a significant number of sole traders and micro enterprises operating in these sectors. It is very common for both agricultural and construction workers to be self-employed and these activities typically have low employment densities compared to office-based roles.

Breckland's largest sector in employment terms is Public Administration, Education and Health – accounting for over 1 in 5 jobs in the district (21%). Other important employment sectors include town centre industries such as Retail and Hospitality, Leisure and Recreation.

The sub sectors that comprise Manufacturing is Breckland's second largest sector in employment terms (16% of all jobs). However, manufacturing only accounts for 6% of the district's business base, indicating that there are several larger manufacturing businesses across the area.



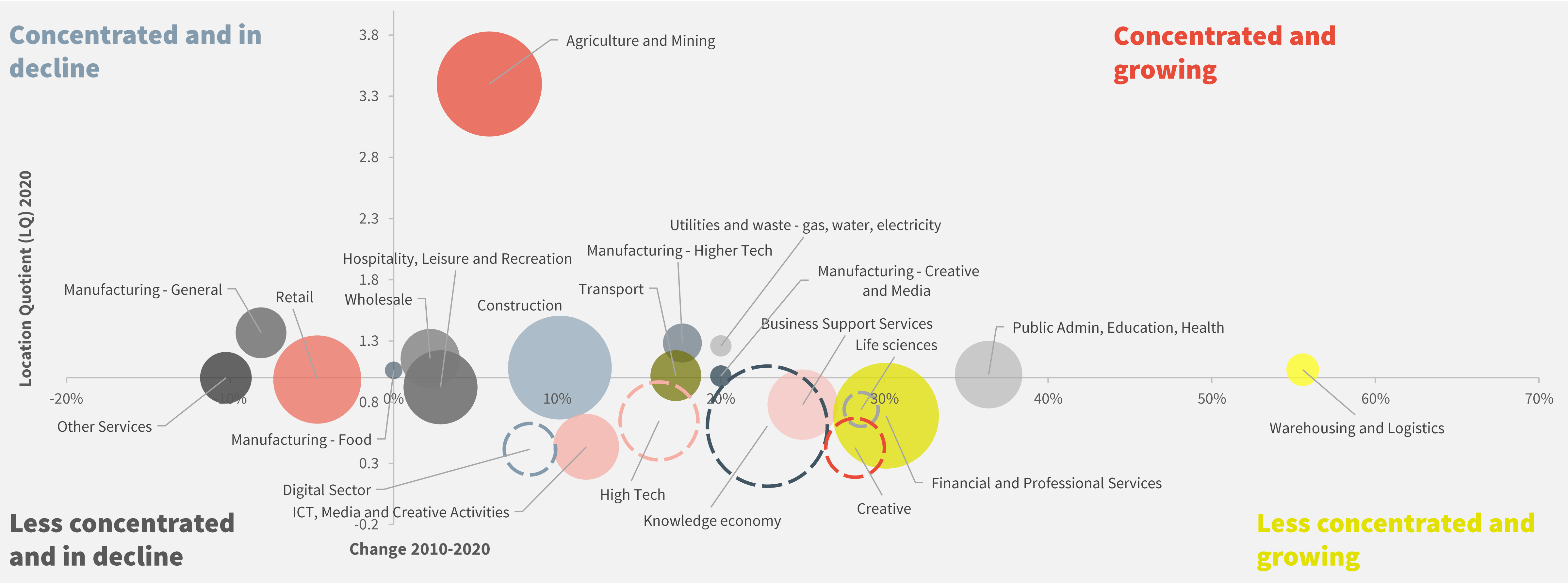


Source: BRES, ONS Business Counts

Breckland's **business specialisms**

Agriculture represents a key growing sector specialism for the district...

Sectors with the greatest number of businesses in Breckland include Agriculture and Mining (14% of all businesses), Construction (14%), Financial and Professional services (14%) and Retail (10%). Agriculture and Mining is 3.4 times more specialised than at the national level. The district also contains business specialisms in General Manufacturing, Higher Tech manufacturing, and utilities and waste. Challenges facing the retail sector across the UK are well established and the sector is in decline locally, with the number of Retail businesses falling by 5% over the last decade. Conversely, Warehousing and Logistics represents a key growth sector for Breckland, growing by 56% over the past 10 years.



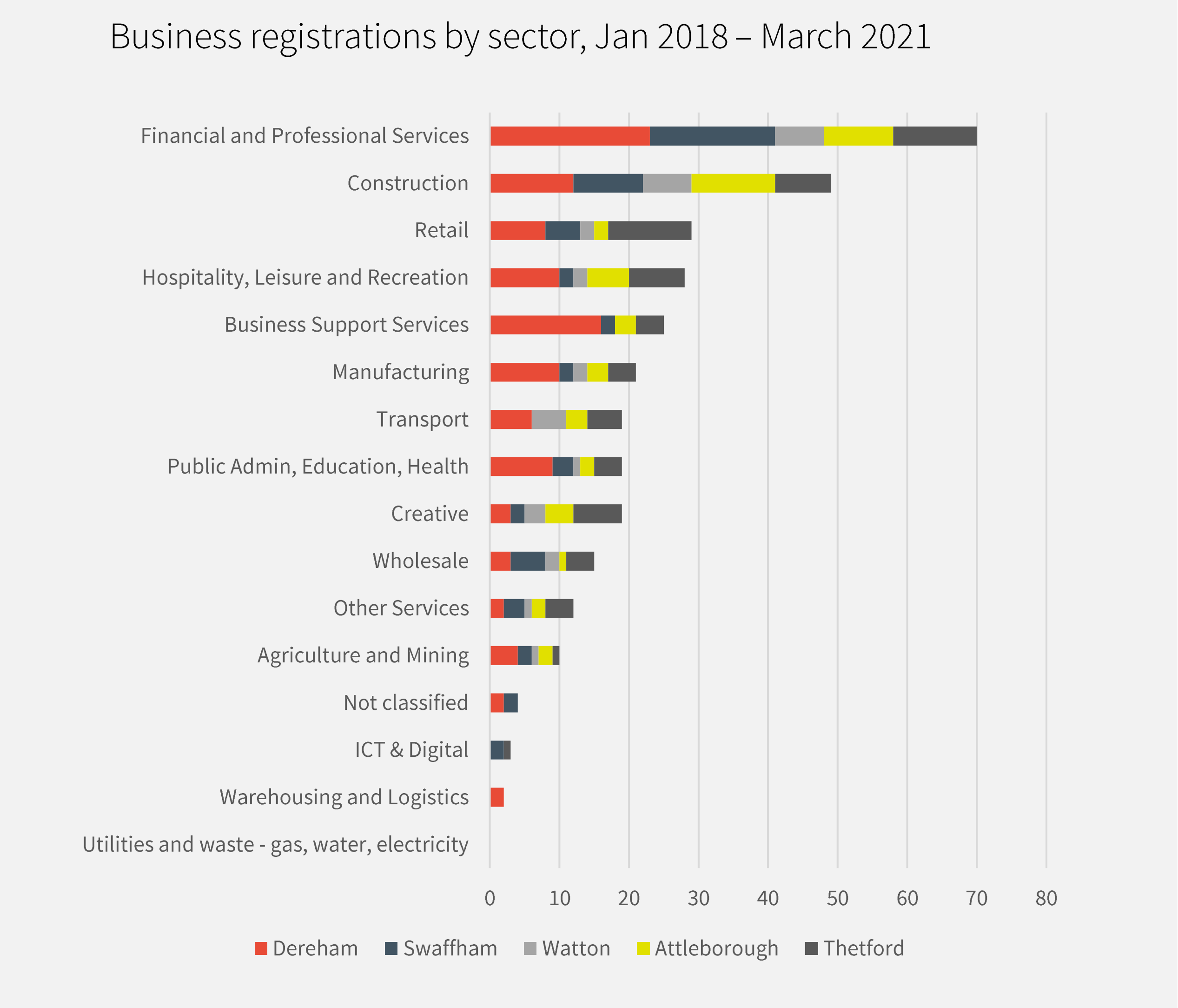
Breckland's **Start-ups**

Financial and Professional Services and Construction drive business start-ups in Breckland's market towns...

Since 2018, 541 new businesses have been established in Breckland.

Sectors with the greatest number of start-ups include Financial and Professional Services (20%), Construction (15%), Hospitality, Leisure and Recreation (9%) and Business Support Services (9%).

60% of Breckland's business start-ups selected a market town as its business location, with the greatest number of market town start-ups in Dereham (34%) and Thetford (23%). Of these 325 businesses that have registered in Breckland's market towns, Financial and Professional Services accounted for 22% of total start-ups with a further 15% in the Construction sector.



In focus: **Business specialisms**

Significant business specialisms across public sector organisations, manufacturing and retail…

Manufacturing and Retail are significantly specialised across Breckland's market towns. A sector is typically considered specialised if it has a Location Quotient (LQ) over 1.2. LQ is a method of quantifying how concentrated a particular industry is in a region as compared to the nation. It can reveal what makes a particular region "unique" in comparison to the national average.

Therefore, for a sector to be specialised in Breckland's market towns, there needs to be at least 1.2 times the number of businesses within that sector as a proportion of the overall business base than the England average. For example, in Watton, there are 4.7 times more food manufacturing businesses as a proportion of the town's business than the England average.

There is a high concentration of businesses within the Higher Tech Manufacturing sector in Thetford and Watton, in addition to Food Manufacturing specialism in Watton and Creative Manufacturing in Attleborough. Dereham (1.6) and Swaffham (1.8) retain business specialisms in retail. As a result, these towns could be more exposed to macro economic trends in relation to changing consumer habits and the growth of online shopping.

Business specialisms in Breckland's market towns (LQ), 2021

Specialism Rank	1.	2.	3.
Attleborough	Utilities and Waste (2.6)	Creative Manufacturing (2.1)	General Manufacturing (2.0)
Dereham	Public Admin, Education, Health (2.2)	Business Support Services (1.8)	Retail (1.6)
Swaffham	Public Admin, Education, Health (2.2)	Life Sciences (2.1)	Retail (1.8)
Thetford	Higher Tech Manufacturing (3.1)	General Manufacturing (2.6)	Manufacturing (2.4)
Watton	Food Manufacturing (4.7)	Public Admin, Education, Health (2.0)	Higher Tech Manufacturing (1.7)

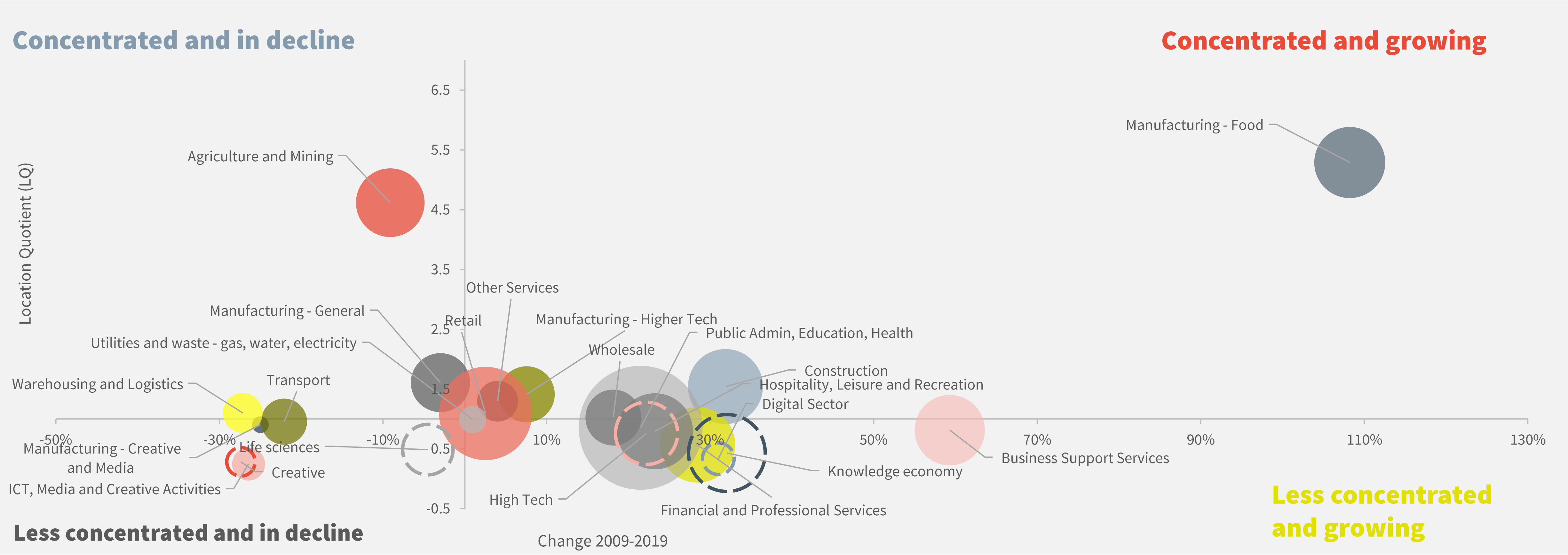
Note: numbers in brackets indicate Location Quotient versus the England average

Source: IDBR

Breckland's **employment specialisms**

Breckland's employment specialisms are potentially more exposed to automation…

Breckland's most specialised sectors in employment terms are Agriculture and Mining and Food Manufacturing. Despite this, employment in Agriculture and Mining fell by 9% over the last decade. Advances in agri-tech is likely to lead to increased future efficiencies within the sector which could put some of this employment at risk but may increase economic output. However, food manufacturing represents a key specialised and high-growth sector for the district. The sector is five times more concentrated in Breckland than the England average, employing over 3,500 people and it grew by 108% between 2009 and 2019. Conversely, despite strong business growth over the last decade Breckland's Warehousing and Logistics sector shrunk in employment terms - over the last 10 years the sector has shrunk by over a quarter (27%).



Source: BRES

In focus: **Employment specialisms**

Regionally significant specialisms in manufacturing-based employment represents a key USP for the five market town economies…

Due to the size of the employment bases of each of the towns, a small number of large local employers can generate significant employment specialisms. The majority of this is concentrated within manufacturing or one of its sub-sectors (such as food manufacturing).

Norfolk and Suffolk is renowned for its well developed and nationally significant food and drink sector, with globally renowned companies. Food manufacturing is the most specialised employment sector in Attleborough, Thetford and Watton. Agri-food is a key sector for the New Anglia LEP and is one of its key sectors within the Local Industrial Strategy. This identifies a substantial opportunity to add value to the economy with an increase in processing and high-tech production methods, automation, enhanced use of information technology and other innovations.

Employment specialisms in Breckland's market towns (LQ), 2021

Specialism Rank	1.	2.	3.
Attleborough	Food Manufacturing (16.7)	Manufacturing (3.9)	Agriculture and Mining (3.5)
Dereham	Business Support Services (4.9)	N/a	N/a
Swaffham	Retail (2.1)	Agriculture and Mining (1.8)	Public Admin, Education, Health (1.4)
Thetford	Food Manufacturing (5.0)	Higher Tech Manufacturing (4.4)	Manufacturing (3.8)
Watton	Food Manufacturing (15.9)	Manufacturing (3.1)	Business Support Services (2.0)

Note: numbers in brackets indicate Location Quotient versus the England average

Source: IDBR

Breckland's **major employers**

Major employers concentrated in the district's largest sectors…

17 organisations in Breckland employ more than 250 people, classifying them as 'large' businesses.

Large employers are distributed throughout the district – with 60% of the 10 largest choosing to locate in Breckland's five market towns. However, the other four are based in rural areas and surrounding villages, reinforcing their importance to Breckland's overall prosperity.

Reflecting the employment and business specialism picture on previous pages, many of the district's largest businesses operate in the Food Manufacturing Sector. The public sector is also one of Breckland's largest employers – with prisons (such as HMP Wayland), schools, hospitals and local authorities employing hundreds of the district's residents.

Largest employers in Breckland by number of employees

Business	Location	Sector
Banham Poultry Ltd	Attleborough	Manufacturing – Food
2 Sisters Food Group	Thetford	Manufacturing – Food
Cranswick Country Foods	Watton	Agriculture
Baxter Healthcare Limited	Thetford	Advanced Manufacturing
HM prison and probation	HMP Wayland	Public Admin, Education, Health
RFT Repairs Ltd	Dereham	Construction
Meryn Lambert Plant Ltd	Garboldisham	Construction
Kerry Foods Ltd	Little Ellingham	Manufacturing - Food
BAM Nuttall Ltd	Shipdham	Construction
Easy Cleaning Solutions Ltd	Thetford	Business Support Services

Economic **participation and employment**

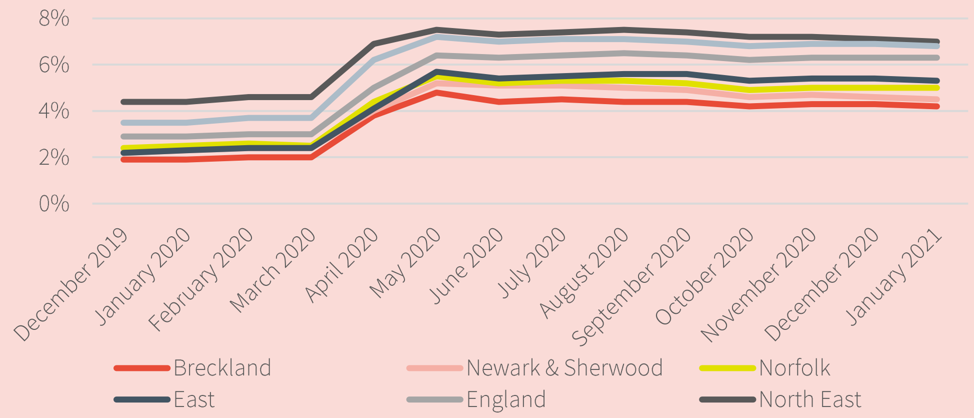
Higher levels of economic participation can underpin Breckland's post COVID recovery…

Breckland performs strongly across a range of employment measures. Unemployment is very low and economic activity is high meaning the district is well positioned to deal with the economic effects of COVID-19.

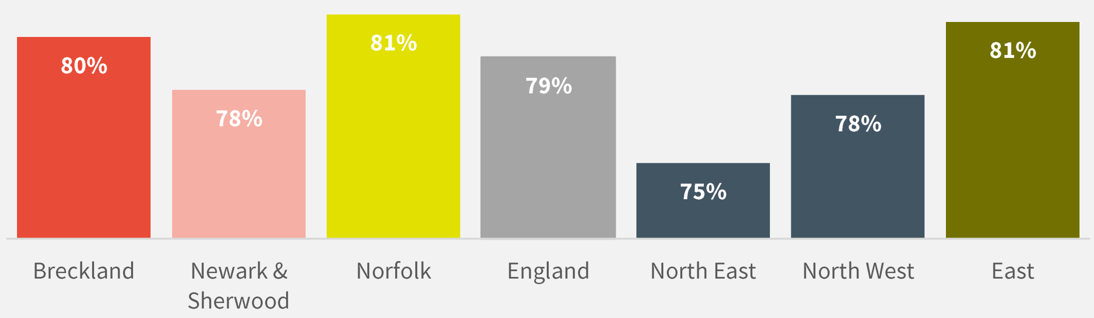
Unemployment is around 3% which is lower than the Norfolk and England averages (4%). Similarly, economic activity is high – 80% of Breckland's residents are economically active which is slightly higher than the England average (79%).

Evidence suggests that Breckland's strong employment position going into the pandemic could help to reinforce the district's economic resilience as the country begins to reopen. Although Breckland's claimant count peaked at 5% in May 2020, it has remained consistently lower than the national and regional averages over the past 18 months.

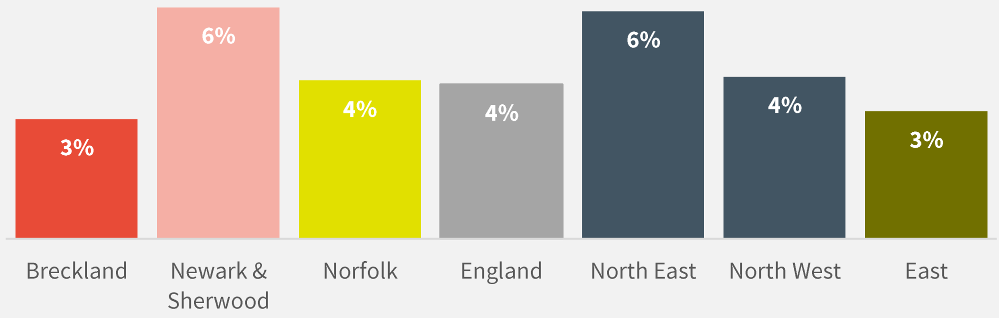
COVID-19 impacts: Claimant count, 2019-2021



Economic activity rate, 2019



Unemployment rate, 2019



Source: ONS Claimant Count

COVID-19 impact: **employment**

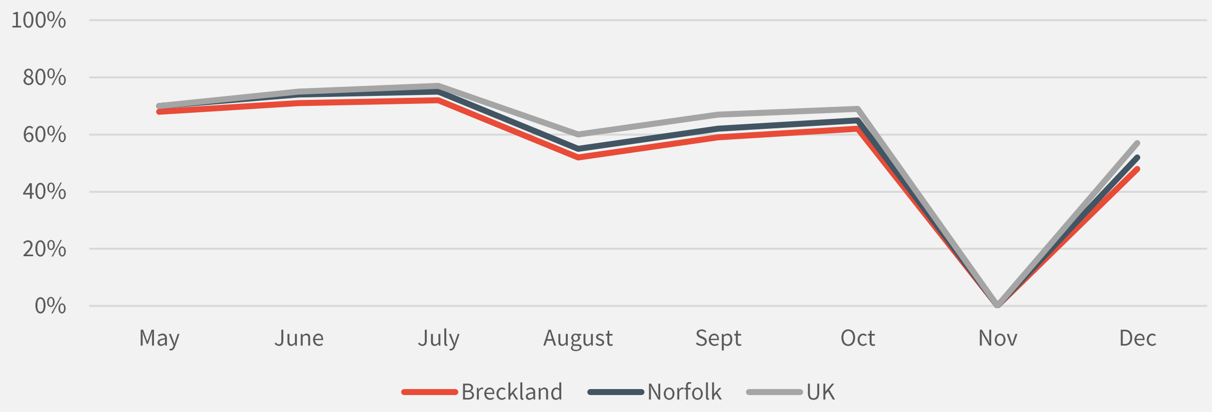
Uptake of COVID-19-related government support is lower than the national and regional averages indicating a less exposed employment structure…

Data from the Family Resources Survey shows that between 2007 and 2018 full time employees were on average £4,000 per year better off than those who are self-employed at the national level. Lower earnings are likely to link directly to lower levels of financial resilience during a prolonged economic downturn.

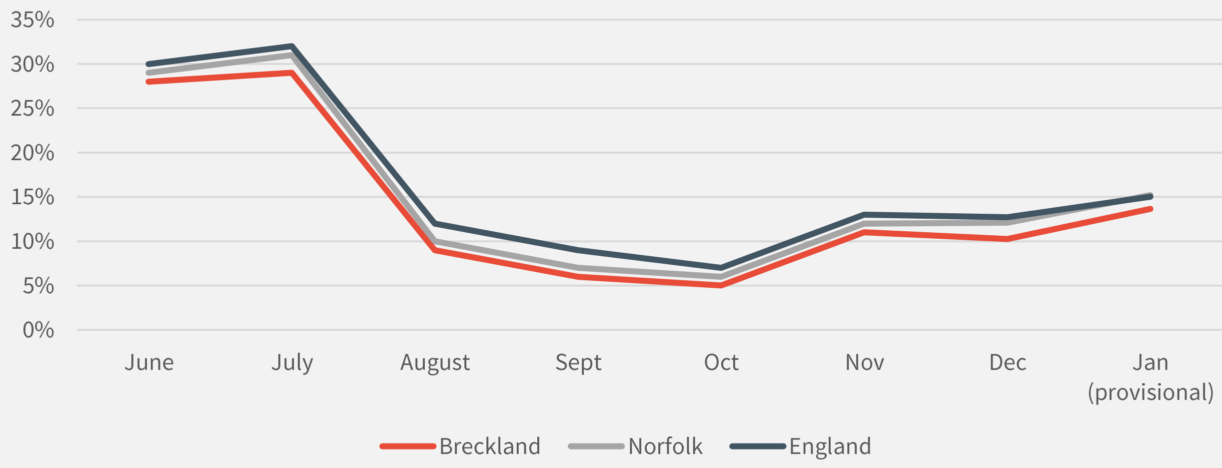
To combat this, many self-employed people have been able to claim Self-Employment Income Support Scheme (SEISS) to top-up lost income as a result of the pandemic. Overall, self-employment in Breckland (5% of adults) is well below the national average (11%) which may have helped to underpin the district's employment resilience.

Despite having a higher proportion of people in employment, the proportion of Breckland residents on furlough has been consistently lower than the England and Norfolk average throughout 2020. This could reflect Breckland's employment structure - with lower amounts of employment in sectors worst affected by the pandemic such as leisure and hospitality and the creative and cultural industries.

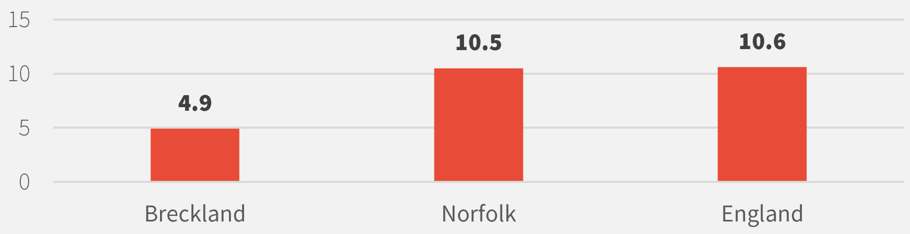
SEISS: Self-employment support take-up, May-December 2020



Coronavirus Job Retention Scheme uptake, June 2020-Jan 2021



% aged 16-64 who are self-employed



Source: HM Treasury, APS, Family Resources Survey

COVID-19 impact: **home working**

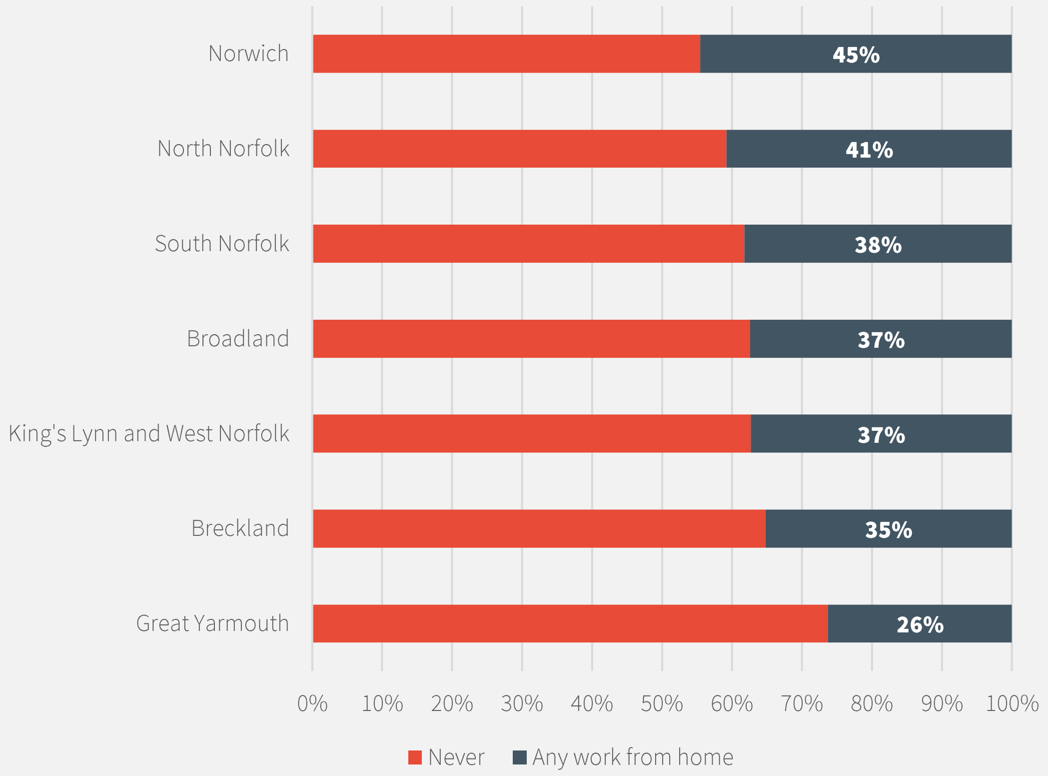
Pre-pandemic, only a small proportion of Breckland's residents worked from home…

Data from Using three variables on the Annual Population Survey (APS), the analysis combines three homeworking statuses to comprise 'any work from home' category:

- **Mainly** – those who report their main place of work as "in their own home" as opposed to "home as a base", "same ground as home" or" another place entirely" (offices, factories, and so on)
- **Recently** – those who do not 'mainly' work at home, but reported doing some work at home in the reference week
- **Occasionally** – those who do not 'mainly' work at home, and did not report doing any work at home in the reference week, but say they do "ever" work from home

In 2020, just over a third (35%) of residents worked from home at any point. This was the lowest out of any of the Norfolk local authorities except for Great Yarmouth (26%). This may have increased the district's health exposure to COVID-19 as shown in the health analysis overleaf.

Proportion of workers that completed work from home, 2020

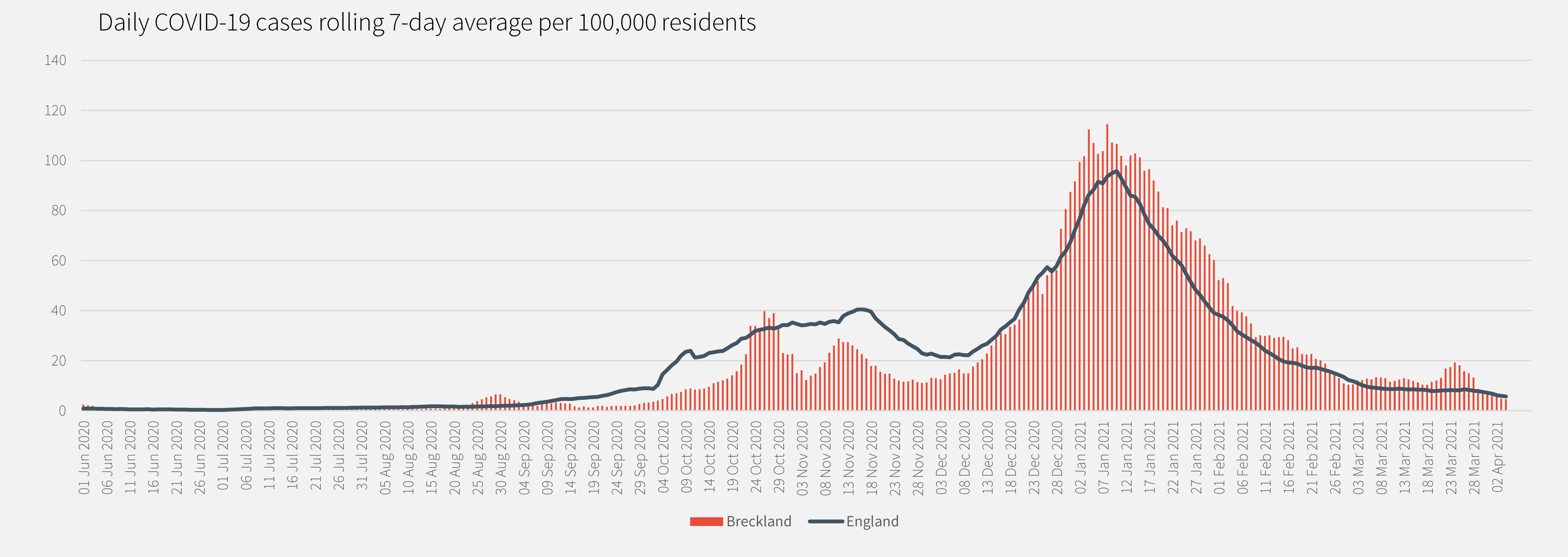


Source: Annual Population Survey, 2020

COVID-19 impact: **health**

Despite resilient economic performance, Breckland was significantly affected by the 2nd wave of the pandemic…

Data on the public health impacts of the pandemic shows that Breckland had a higher case rate in the second wave of the pandemic than the England average. Breckland's seven-day average case rate peaked at 114 cases per 100,000 of the population compared to the peak in England of 95 on the 12th January. This demonstrates that Breckland's economic resilience to the pandemic is underpinned by structural factors that define the district's economy rather than it being less badly affected by the public health emergency.



Source: Gov.uk

1.5

Breckland's People

People **Summary**

Breckland's people

Breckland has an ageing population. 57% of Breckland's residents are of working age compared to 62% of England. Residents aged 65+ is the district's fastest growing age group, growing by 33% over the last 20 years which is significantly higher than the national average (+23%).

Breckland's population has grown significantly. Over the past 20 years, the district's population has grown by 18% which is higher than the England (15%) and the Norfolk (15%) averages.

The district is home to a large proportion of migrants reflecting the district's agricultural heritage and sector mix. International National Insurance registrations from the EU fell by 71% in 2020.

Breckland's residents are less well qualified than the national average. Just over a quarter (27%) of residents are educated to degree-level (NVQ 4+) compared to the England average of 40%.

Social mobility in Breckland is very low. Breckland ranks 306th out of 346 local authorities nationally. The district is considered a social mobility 'cold spot' and means local disadvantaged young people are less likely to achieve good educational and employment outcomes.

Resident health outcomes are poor. Over two thirds (68%) of residents are either obese or overweight compared to 62% of people nationally.

Crime rates are low. In 2020, 58.3 crimes per 1,000 residents were committed in Breckland compared to the England average (82.8)

Policy implications for Breckland's market towns

1. **Need to balance attracting working-aged residents to live and work in Breckland's market towns with ensuring service provision meet local needs**. Currently, Thetford and Dereham (the district's largest market towns) have the largest proportion of young and working aged residents. Town Delivery Plans should consider local demographics to reflect the role and function of each town and ensure they better meet local need.

2. **Accommodating housing growth within market towns will be an important component of Breckland's future vitality.** Over 15,000 new homes are planned for Breckland's market towns- these should be delivered as part of an integrated strategy for place through the Town Delivery Plans to create balanced communities and local economies that meet local need.

3. **Providing social and green infrastructure to support happy and healthy lives is integral for place prosperity.** Breckland's worst performing neighbourhoods for access to healthy assets are predominantly found within market towns. The Town Delivery Plans should consider the local infrastructure requirements to enable residents to live healthy, active lifestyles.

4. **Raising aspiration key to addressing low-skill, low wage economy.** Higher Education participation rates for young people living in Breckland's market towns are amongst some of the lowest in the country. Town Delivery Plans should consider providing the educational and social infrastructure to improve attainment locally, enhance aspiration and ensure that all residents are able to achieve their potential regardless of background or circumstance.

5. **Celebrating what makes Breckland's places great.** Town Delivery Plans should look to celebrate and improve on key factors influencing people's choices of where to live and work (such as low crime rates).

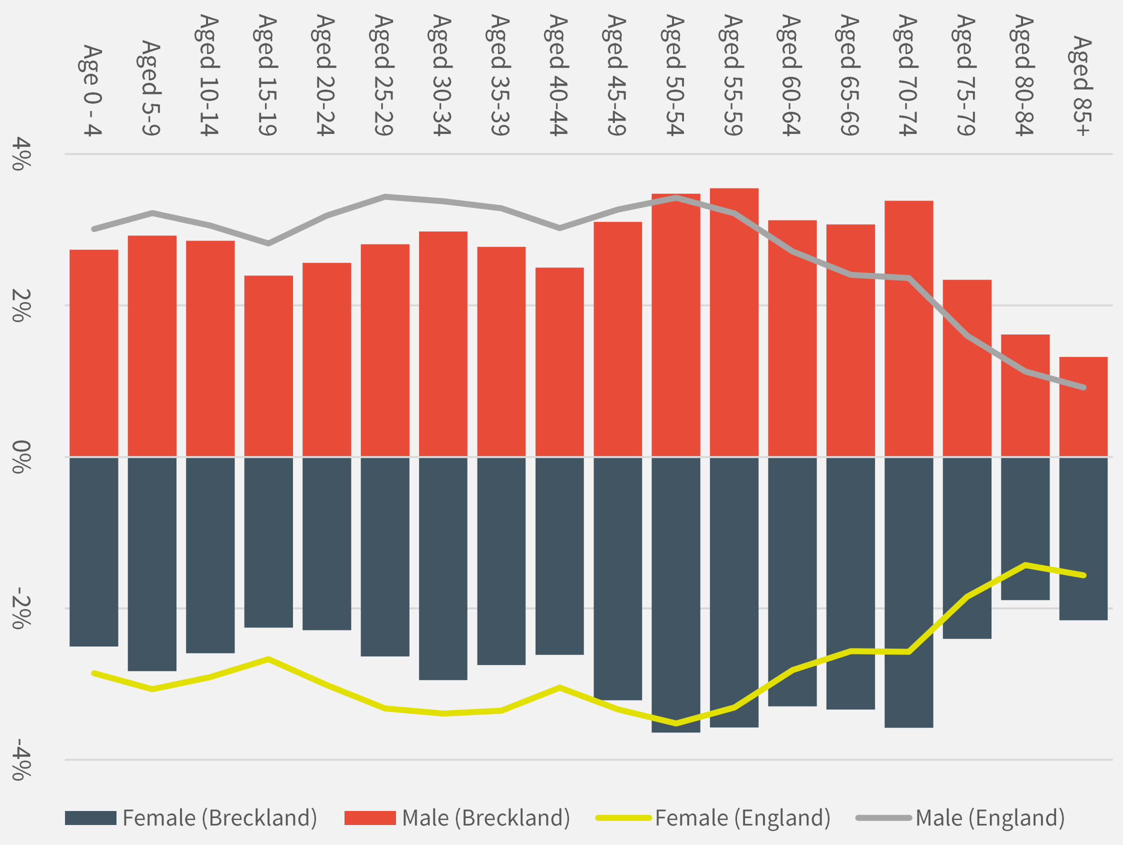
Breckland's **demographics**

Breckland has an ageing population which could lead to economic and public service challenges…

Breckland has a population structure that has direct implications for its current and future economic performance:

- **The working age population (aged 16-64) accounts for 57%** of people in Breckland compared to 58% in Norfolk and 62% in England. This comparatively low proportion of working-age residents could affect the district's growth as some businesses base their decision to locate in an area based on local workforce availability .
- **The population aged 65+ accounts for 25%** of people compared to 25% in Norfolk and 18% in England. This group has seen a 56% increase over the last 20 years and 30% rise over the last 10 years which compares to 33% over the last 20 years and 23% over the last 10 years at the national level. Breckland's ageing population could put increased pressure on public services.
- **The population aged 0 to 15 accounts for 17%** of Breckland's population, which is in line with Norfolk but lower than the national average (20%). This means that without significant changes to local demographics, Breckland's ageing population is likely to get more acute compared to the national average.

Breckland's population structure, 2019



Source: ONS Mid Year Population Estimates

Breckland's **demographics**

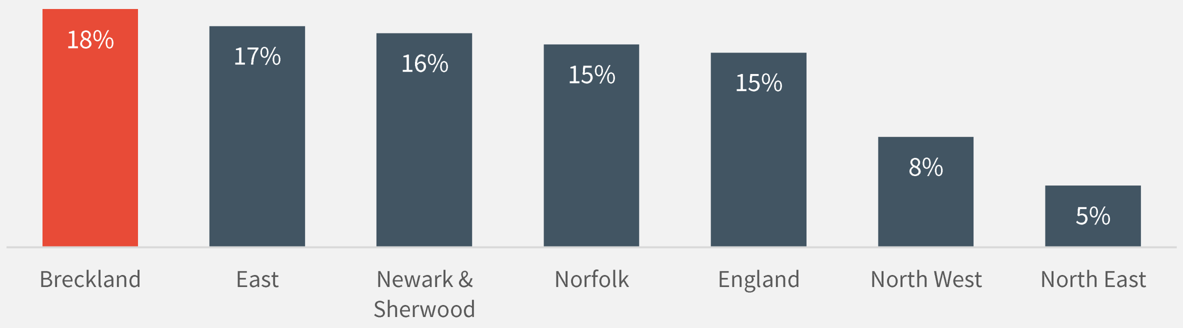
Breckland's population has consistently outgrown comparator areas over the last two decades…

Despite challenges of an ageing population, Breckland's population has grown significantly in recent years. The total population is around 140,000 and this number has increased by around 21,500 since 1999, equivalent to a growth rate of 18% (vs 15% in Norfolk and England). Of this, the population has increased by around 10,500 people since 2009, which is equivalent to an 8% population growth rate over the past 10 years (vs 7% in Norfolk and 8% in England).

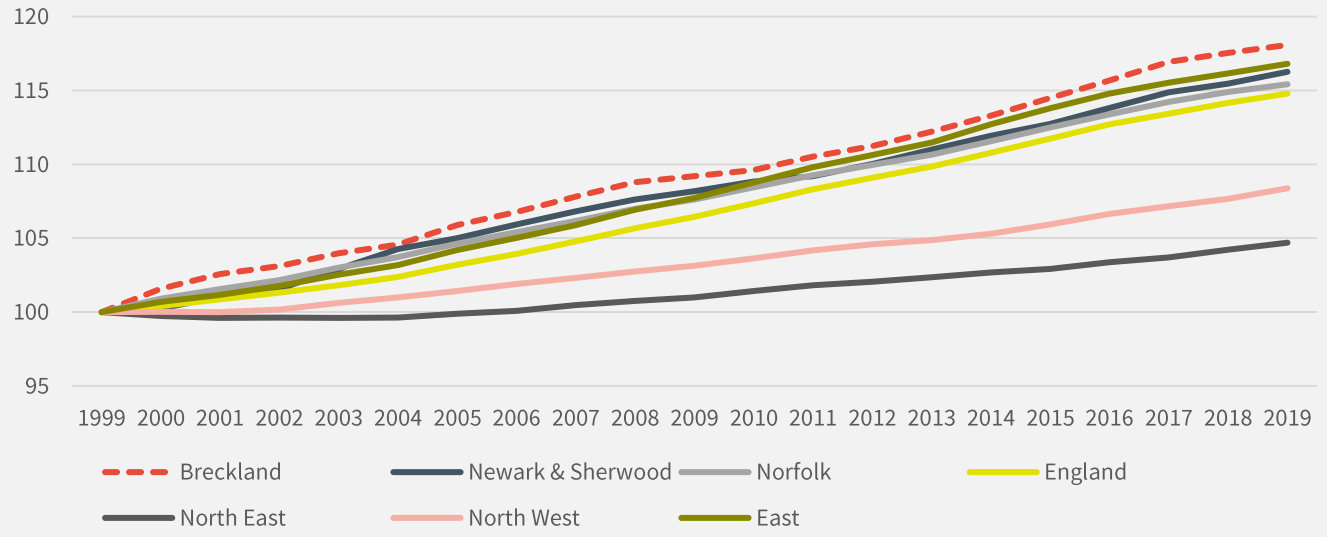
Whilst this is partly due to the district starting from a relatively low base compared to other areas, the district has also been very successful in meeting its housing targets. The government ranks the housing delivery of every plan making authority on an annual basis using the Housing Delivery Test. The 2020 test showed that between 2017-18 and 2019-20, 1,870 homes had been delivered across the District which represents 110% of the homes required. Ensuring housing delivery supports a growing population will be important for local affordability.

This population growth could put increasing pressures on local physical infrastructure such as roads and housing. Unless proactively addressed, it will also increase demand for council and wider public services – notably local health and education provision. As a result, it is important that in conjunction with the Breckland Local Plan, the Future Breckland programme takes a holistic approach to development. This will ensure the growth and evolution of the district's market towns continues to support balanced, healthy and thriving communities.

% population growth, 2019 vs 1999



Indexed population growth, 1999-2019 (1999 =100)



In focus: **Strategic Urban Extensions**

Breckland's population will continue to grow rapidly…

Breckland's local plan contains two ambitious proposals for Strategic Urban Extensions in Attleborough and Thetford. This will deliver 4,000 new homes – accommodating an estimated 21,000 new residents.

These urban extensions will create new opportunities for Breckland's market towns – creating a critical mass of people to enhance the vitality of both towns. The proposals will also enhance the importance of both places on the Cambridge Norwich Tech Corridor.

As the population grows in both towns, it will be important that appropriate transport, economic, social and health infrastructure is provided to create healthy, balanced communities. Proposals for Attleborough also includes:

- A new 30-minute bus service connecting the development to the town centre and train station
- Improved pedestrian and cycle links to the town centre including a new footbridge over the railway line
- Two x 2 Form Entry Primary Schools (with land safeguarded for future expansion to 3 Forms of Entry) and contributions to Secondary Education
- A new Local Centre with 4,000 sqm of space for shops, cafes, a pub and small offices - all providing local employment opportunities
- A 2,100 sq m Community Centre
- Around 90 ha of publicly accessible recreational open space

The Thetford Strategic Urban Extension will deliver:

5,000 new homes

28 hectares of employment land

The Attleborough Strategic Urban Extension will deliver:

4,000 new homes in total

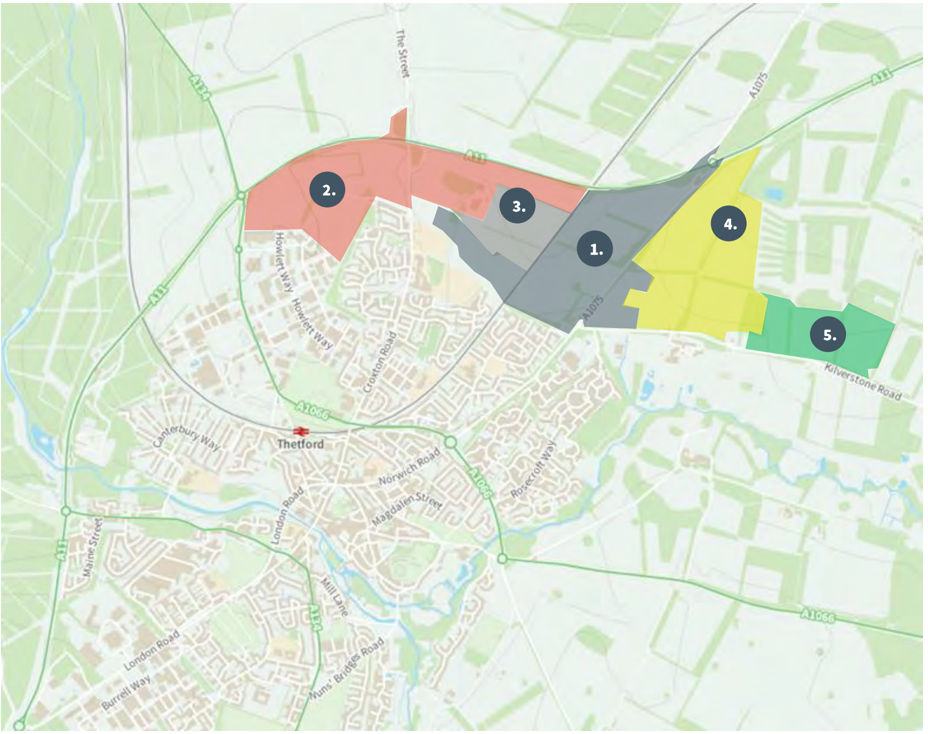
2,680 in this planning period

Upon completion, this could result in the following increase in Breckland's resident population:

12,000 new residents*

*Based on MHCLG estimates of population per dwelling in England which stood at 2.3 in 2020

Thetford Urban Extension Phasing (2018-2043)



1. Phase 1: 1050 houses (2018–2024)
2. Phase 2: 965 houses (2025–2029)
3. Phase 3: 985 houses (2030–2033)
4. Phase 4: 1291 houses (2034–2039)
5. Phase 5: 709 houses (2040–2043)

Breckland's **diversity and migration**

Inward migration is an important characteristic of Breckland's labour market but numbers have fallen significantly in 2020....

White British is Breckland's dominant ethnic group – accounting for 90% of the district's population in the 2011 Census. The district is also home to small established African and South Asian Communities. However, in the years following the Census, migration has shifted Breckland's demographics and the local labour market has relied significantly on migration from the European Union.

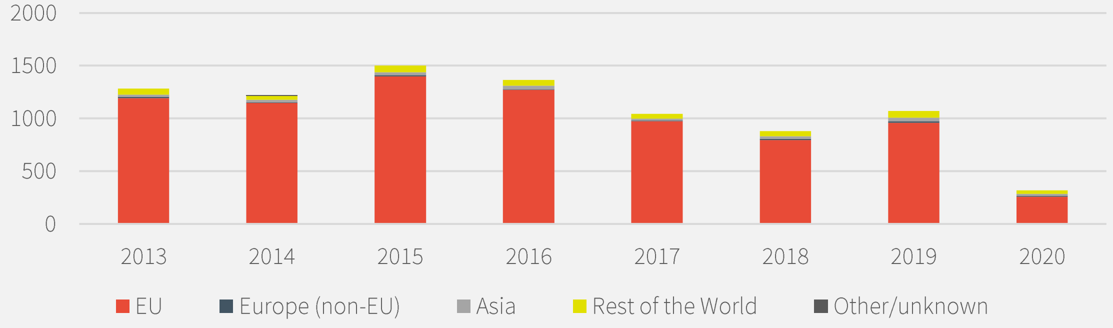
Between 2013 and 2020, Breckland hosted 18% (8,674) of Norfolk's economic migrants*. The primary source of Breckland's international inward migration is from the EU (92% of National Insurance Number registrations between 2013 and 2020).

Despite this, there are signs that this previously consistent labour pool is being impacted by Brexit and COVID-19 related travel restrictions – potentially affecting Breckland's economic vitality in key sectors such as agriculture. National Insurance Number (NINO) registrations from the EU fell by 73% in 2020 compared to 2019 levels.

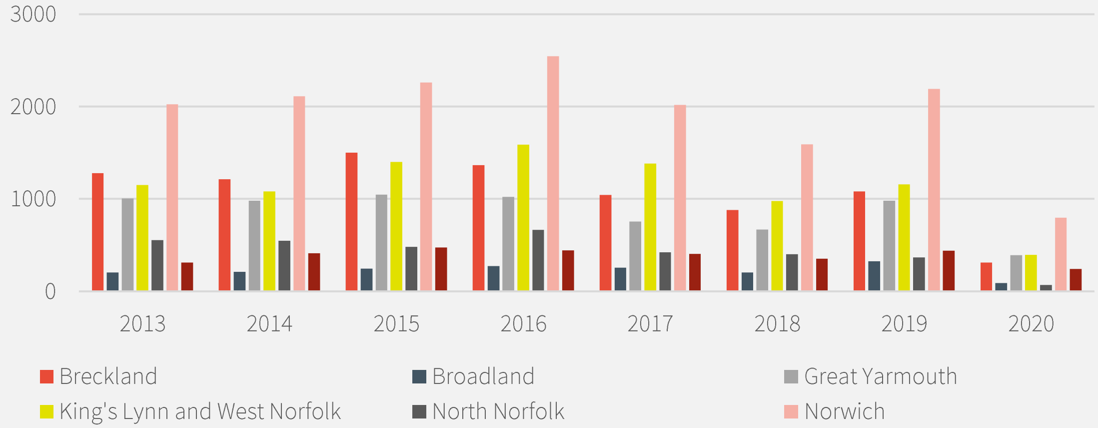
Country of birth: white and ethnic minority, 2020

	Breckland	Newark and Sherwood	East	England	Norfolk	North East	North West
White UK born	90.7%	93.3%	82.8%	77.6%	90.6%	92.2%	84.6%
White not UK born	8%	3.1%	7.2%	7.0%	6.3%	2.8%	4.0%
Ethnic minority UK born	0%	3.7%	5.0%	8.0%	1.4%	2.1%	6.0%
Ethnic minority not UK born	1%	0.0%	5.0%	7.4%	1.7%	2.9%	5.4%

NINO Registrations for Adult Overseas Nationals in Breckland by origin destination, 2013-2020



Total NINO Registrations To Adult Overseas Nationals Entering The UK, 2013-2020



Source: Census,2011, Annual Population Survey, DWP NINO Registrations to overseas adults
* Note: only includes migrants with NI Number

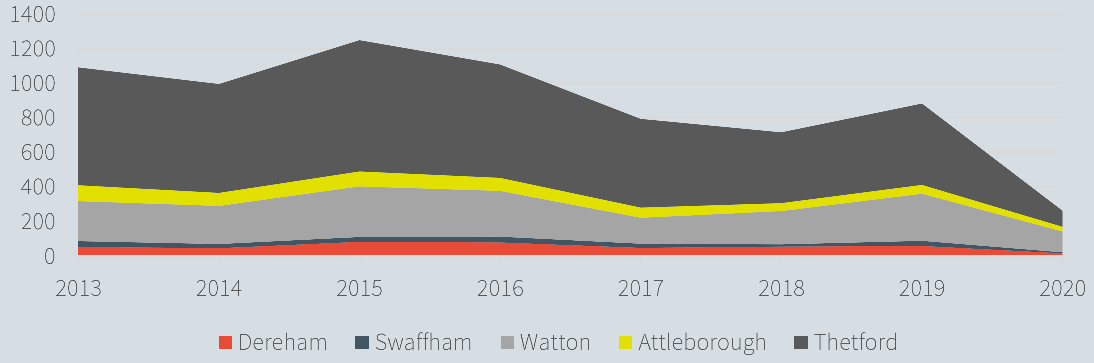
In focus: Market town **demographics**

There are higher concentrations of young people in Breckland's market towns, and local demographics reflect and shape their form, role and function…

Thetford (26,837 people) and Dereham (19,464) are Breckland's largest market towns. Demographics within each town will dictate the function and character of each place. Thetford, for example, has the highest proportion of working age people (63%) – providing a strong rationale for it to be one of the district's primary economic drivers. Conversely, over a third (34%) of Swaffham's residents are aged 65+, meaning that it is Town Delivery Plans should focus on strengthening it as a key service centre.

The impact of reduced EU migration (see previous page) has been more acute in specific market towns. Between 2013 and 2020, 97% of international National Insurance registrations in Watton were from the EU. Managing the short-term drop off in international migration is therefore likely to be an important factor in the economic vitality of each town as well as the Breckland's economy as a whole.

NINO registrations by market town, 2013-2020



Source: ONS Annual Population Estimates, NINO Registrations

Population estimates for Breckland's market towns, 2020

	Population Estimate	Aged 0-15	Aged 16-64	Aged 65+
Dereham	19,464	18%	57%	25%
Swaffham	8,278	16%	50%	34%
Watton	8,248	15%	55%	30%
Attleborough	9,953	17%	59%	24%
Thetford	26,837	21%	63%	16%
Ely	21,646	21%	60%	19%
Southwell	7,387	15%	55%	30%
Faversham	20,105	19%	59%	22%
Woodbridge	8,228	15%	50%	34%
Wymondham	17,325	20%	59%	21%

Total NINO registrations by origin destination, 2013-2020

	Total Migration*	EU	Non-EU Europe	Asia	Rest of the world
Dereham	446	379 (85%)	10	25	30
Swaffham	186	152 (81%)	5	22	15
Watton	1,740	1,687 (97%)	12	15	22
Attleborough	518	471 (91%)	8	13	23
Thetford	4,223	3,985 (94%)	26	73	126

*Note: excludes 'other/unknown'

Skills levels **and qualifications**

Low levels of degree-educated residents and lower levels of educational attainment...

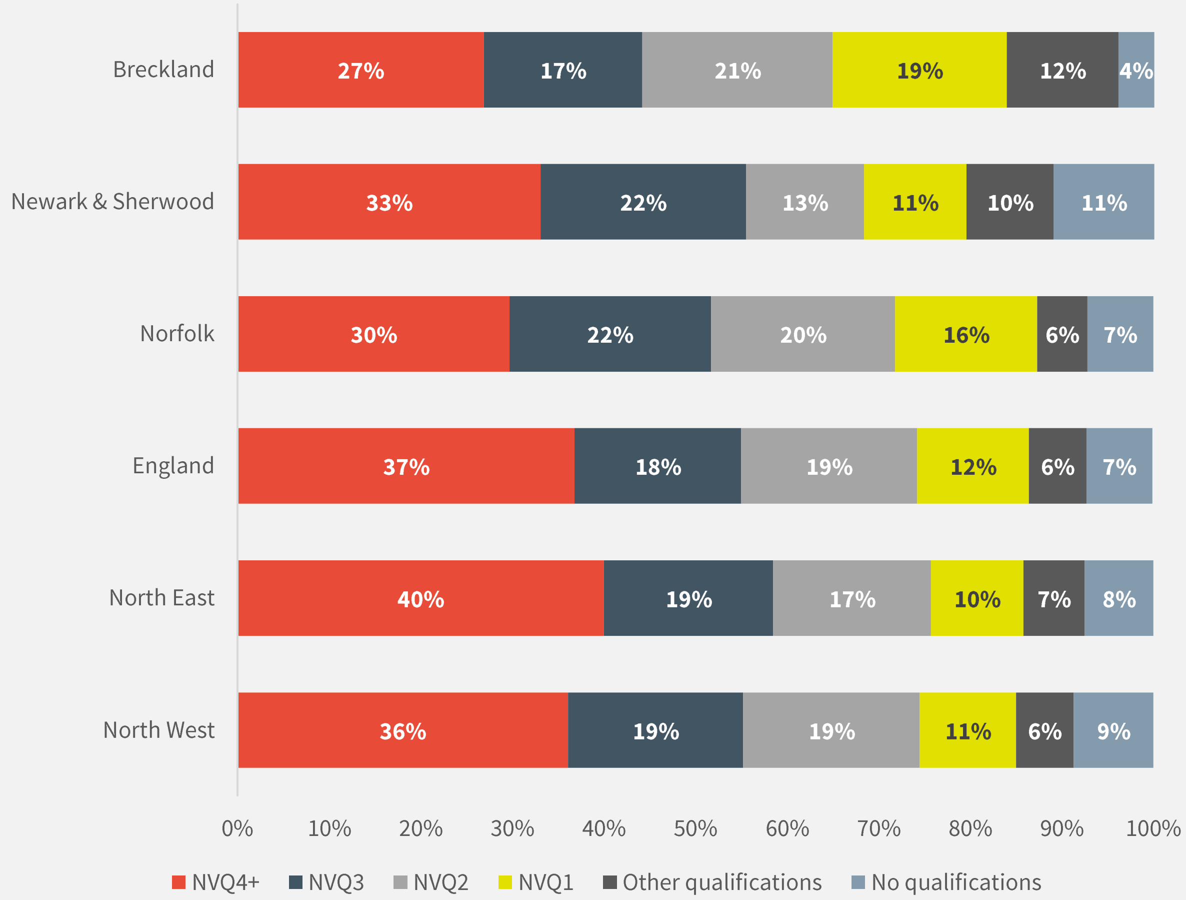
Breckland's qualification profile is as follows:

- **17% of residents are educated at NVQ Level 3. This is the equivalent of A-Levels/BTEC National Certification/diploma accreditations**
- **21% of residents are educated at NVQ Level 2.** This is the equivalent of achieving GCSE grades A*-C/Intermediate GNVQ, BTEC first certificate.
- **19% of residents are educated at NVQ Level 1.** This is the equivalent of achieving GCSE grades D-G.

Just over a quarter (27%) of Breckland's residents are educated to degree level. This is lower than all of the comparator areas and significantly lower than the England average (40%). Breckland also has a significantly lower proportion of degree educated residents than the north east (40%) and the north west (36%) which is interesting as these places are commonly perceived to be 'left behind'.

Whilst the District has a lower proportion of the population with no qualifications (4%), it has a high proportion of mid-level qualifications suggesting progression into Higher/Further Education is a challenge locally.

Breckland Qualification profile, 2019



Source: Annual Population Survey

In focus: **market town HE participation**

Low levels of Higher Education participation can be found in Breckland's market towns…

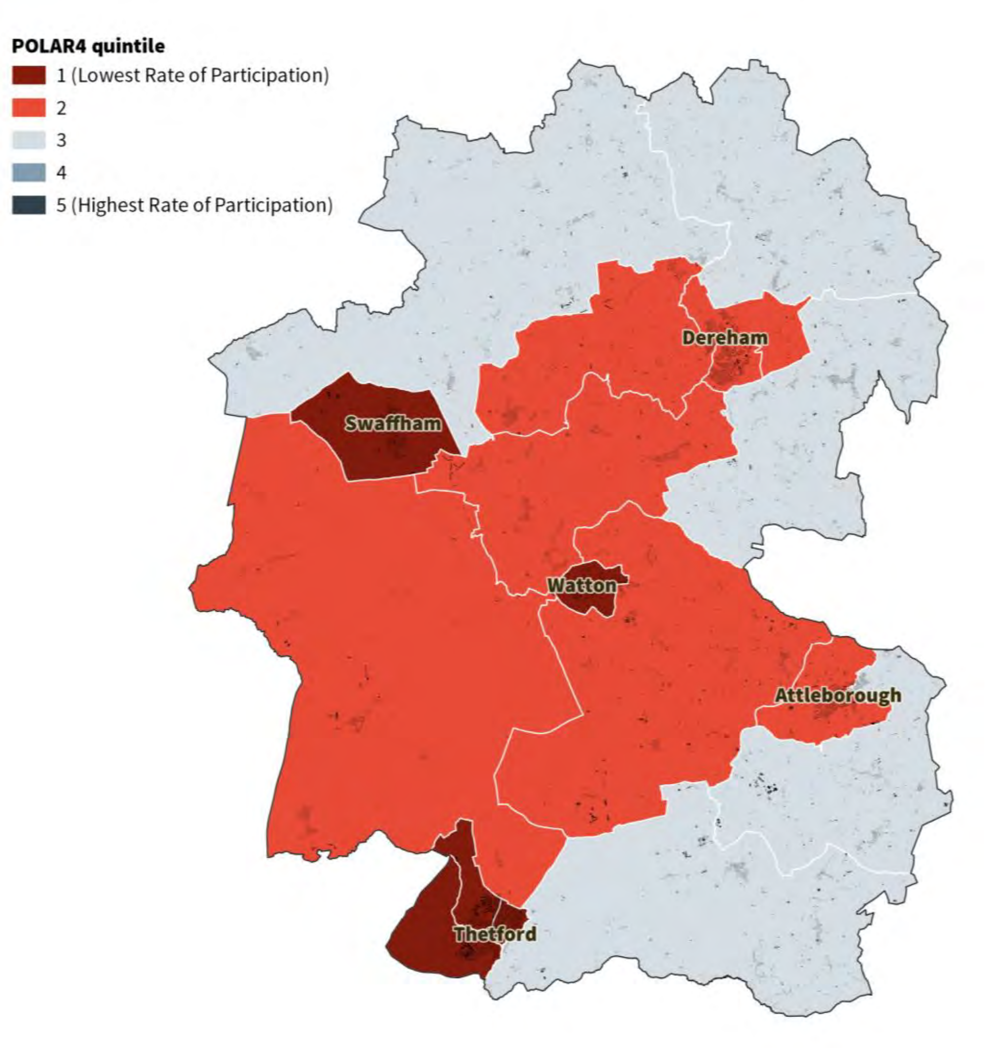
POLAR4 classifies local areas across the UK according to the participation rate of young people in higher education using MSOAs for England and Wales. A 'young participation rate' is calculated by dividing the number of young people from each area who enter higher education aged 18 or 19 by the young population of that area.

Despite being Breckland's hubs of employment and population, school leavers living in the five market towns are unlikely to go to university. Thetford, Swaffham and Watton all rank within the lowest quintile of MSOAs nationally in terms of rate of participation in Higher Education. Rate of participation across all towns in Breckland ranks within the bottom 40% nationally.

POLAR4 ranking of Breckland's market towns

Town	POLAR4 quintile	Participation rate (%)
Watton	1	17.7
Swaffham	1	23.4
Attleborough	2	28.8
Thetford	1	17.6
Dereham	2	26.6
Ely	4	43.0
Wymondham	4	41.3
Southwell	5	62.3
Faversham	2/3	29.3
Woodbridge	5	54.9

Mapping Breckland's HE participation, 2014



Source: Polar4

Breckland's **social mobility**

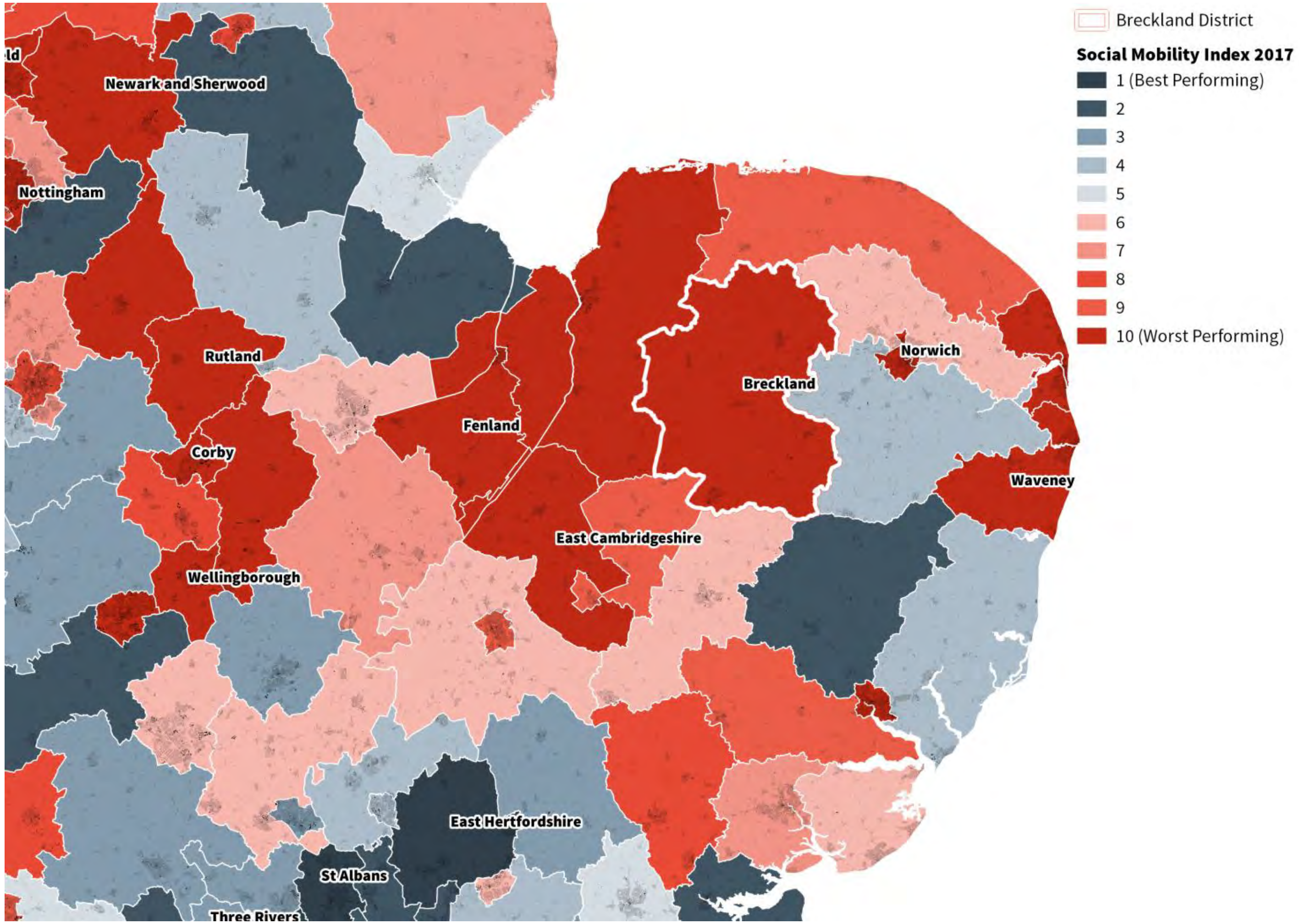
Breckland has some of the lowest social mobility in the country…

The Social Mobility Commission provides a view of social mobility in England. The index measures social mobility prospects in each local authority through 16 key performance indicators* and compares the opportunities for young people from disadvantaged backgrounds to succeed based on where they live. The index demonstrates which parts of the country have the best social mobility outcomes and highlights the presence of a social mobility cold spot in Breckland compared to the wider region, with Breckland ranking 306 out of 346 local authorities in terms of performance.

Whilst Breckland performs relatively well for Early Years social mobility (top 25% of local authorities nationally) , Breckland scores particularly poorly across the following categories:

- School age:
  - Breckland ranks 316th out of 346 local authorities for '% of children eligible for free school meals attending a primary school rated 'outstanding' or 'good' by Ofsted'.
  - 321st for '% of children eligible for free school meals achieving at least a level 4 in reading, writing and maths at the end of Key Stage 2'.
- Adulthood
  - 306th for '% of people that live in the local area who are in managerial and professional occupations (SOC 1 and 2)'.
  - 320th for '% of jobs that are paid less than the applicable Living Wage Foundation living wage'.

Social mobility index, 2017



*Indicators include: % of nursery providers rated 'outstanding' or 'good' by Ofsted; % of disadvantaged children achieving a 'good level of development' at the end of the Early Years Foundation Stage; % of disadvantaged children attending a primary school rated 'outstanding' or 'good' by Ofsted; % of disadvantaged children achieving at least a level 4 in reading, writing at maths at the end of Key Stage 2; % of disadvantaged children achieving 5 good GCSEs including English and maths; % of disadvantaged young people not in education, employment or training one year after completing Key Stage 4; Average points score per entry for disadvantaged young people taking A-level or equivalent qualifications; % of disadvantaged young people achieving 2 or more A levels or equivalent qualifications by the age of 19; % of disadvantaged young people entering higher education by the age of 19; % of disadvantaged young people entering higher education at a selective university (most selective third by UCAS tariff scores) by age 19; Median weekly salary of employees who live in the local area; Average house prices compared to median annual salary of employees who live in the local area; % of people that live in the local area who are in managerial and professional occupations (SOC 1 and 2); % of jobs that are paid less than the applicable Living Wage Foundation living wage; % of families with children who own their own home

Source: Social Mobility Index

Breckland's **occupational profile**

Polarised occupational profile, dominated by mid and lower skilled occupations reflects Breckland's low skill base…

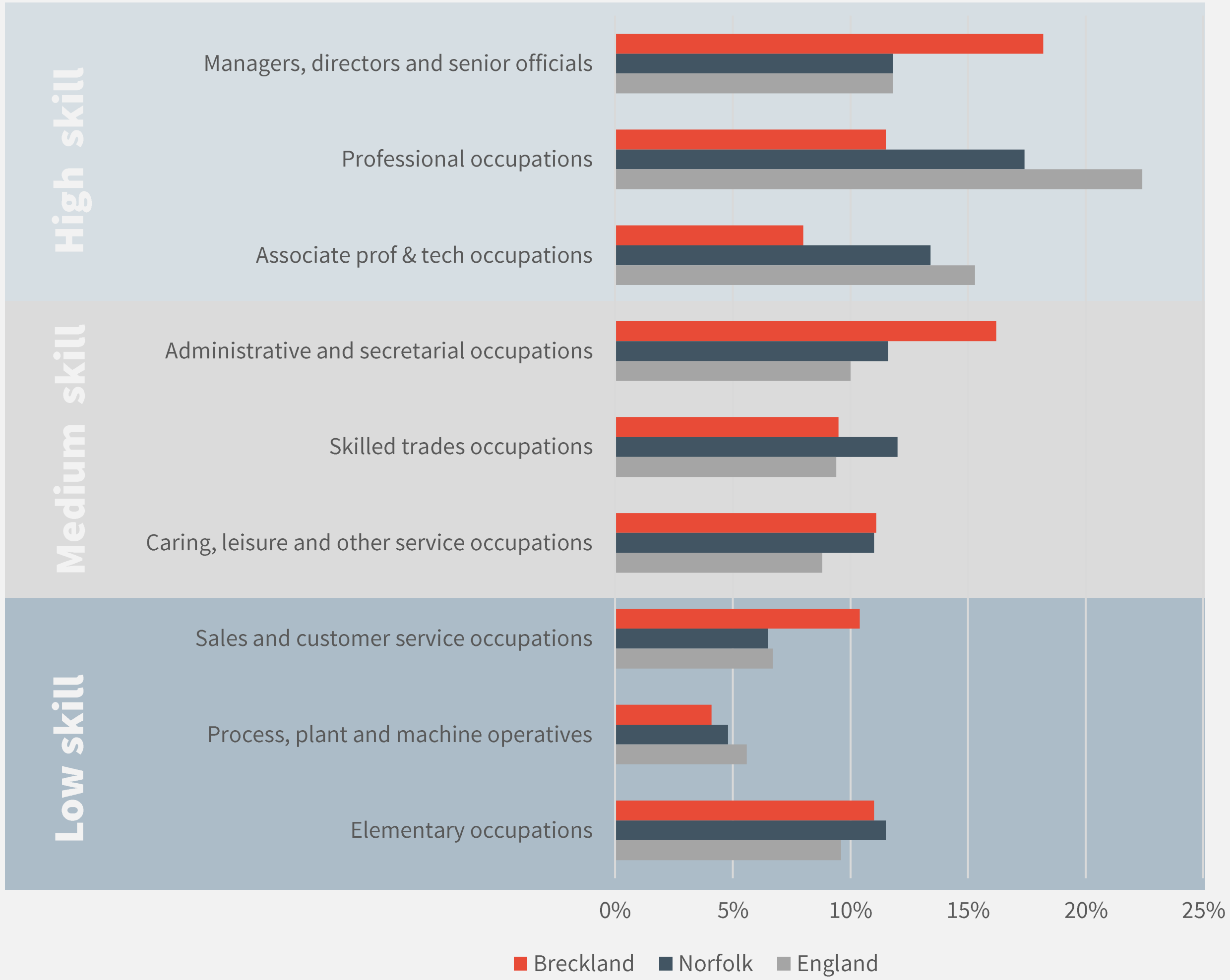
Breckland resident's highest occupational concentrations are within the highest level occupations (Managers, Directors and Senior Officials comprising 18% of all employment) and Administrative and Secretarial occupations (16%). Other significant occupational roles include Professional (12%), Caring, Leisure and Other Services (11%) and Elementary (11%).

Using Standard Occupation Classifications (SOC) from the ONS, it is possible to use the occupational profile to obtain an approximation of jobs that are typically considered to be high, medium and low skill:

- High skill (SOC 1-3): these roles generally require graduate level education to access.
- Medium skill (SOC 4-6): mostly require a level 3-5 qualification.
- Low skill (SOC 7-9): mostly qualification level 2 and below.

Despite high levels of employment in managerial roles, employment within the top three highest skills levels in Breckland accounts for 38% of all employment and trails behind Norfolk (43%) and national averages (50%). Meanwhile, the proportion of employment in middle-level occupations and lower level occupations in Breckland is higher than regional and national averages.

Occupational profile, September 2020



Source: Annual Population Survey

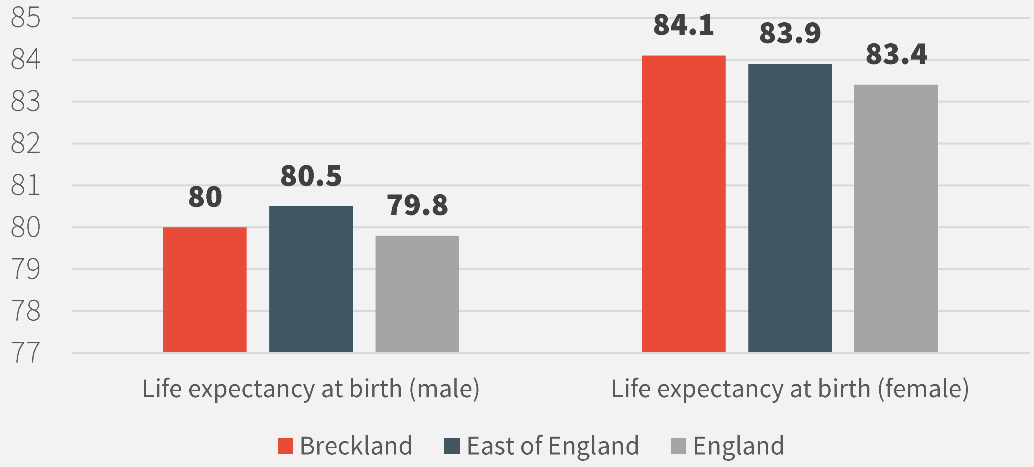
Breckland's **health and wellbeing**

Good overall life expectancy but unhealthy weight is a serious challenge…

Life expectancy in Breckland is broadly in-line with national and regional averages – life expectancy at birth is 80 for men and 84 for women. The district also has lower average mortality across a range of health metrics than at the national and regional levels. Breckland outperforms national and regional comparators across all measures with the exception of the suicide rate which is marginally higher.

Despite this, the long-term health of the district's population could be impacted by unhealthy weight of residents. Over two thirds (68%) of Breckland's residents are classified as overweight or obese. This is significantly higher than the regional (63%) and England (62%) averages , as well as comparator regions such as the North West and North East (65%), indicating an acute challenge locally.

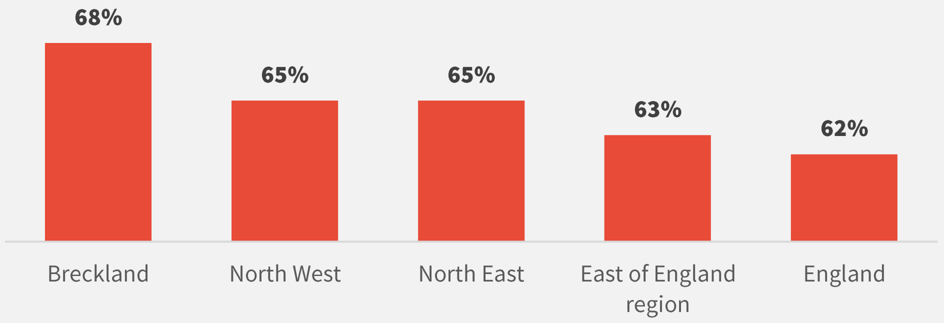
Life expectancy at birth, 2017-2019



Wider health measures, 2017-19

Measure	Under 75 mortality rate from all causes (per 100,000)	Under 75 mortality rate from all cardiovascular diseases (per 100,000	Under 75 mortality rate from cancer (per 100,000)	Suicide rate (per 100,000)
Breckland	286	58.9	117.4	12.3
East of England	298	62.9	122.6	10.5
England	326	70.4	129.2	10.1

% of adults classified as overweight or obese, 2018/19



Source: PHE Fingertips

In focus: **access to green space**

Lowest levels of active green spaces found in Breckland's market towns…

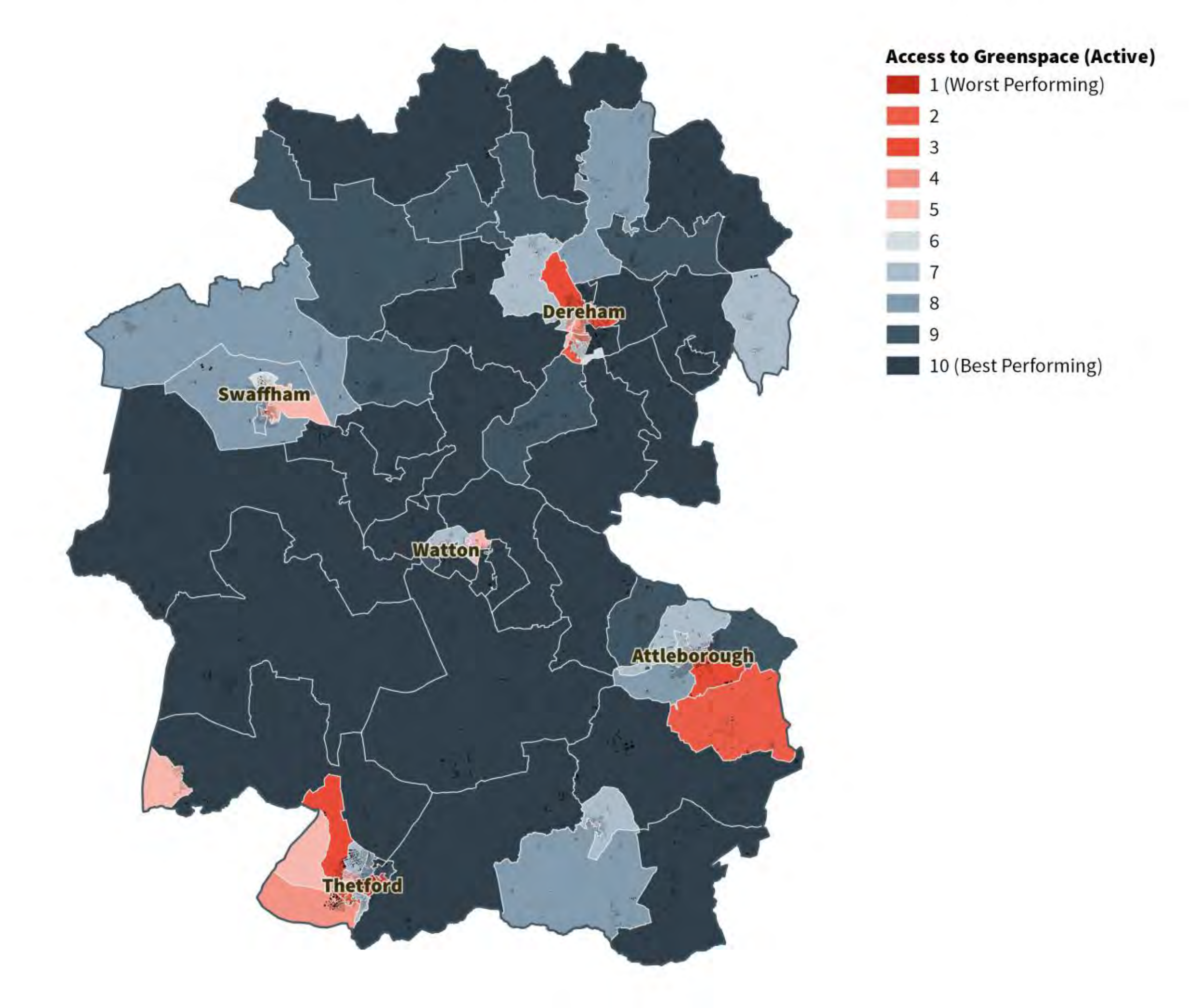
Access to Health Assets and Hazards (AHAH) is a multi-dimensional index for Great Britain measuring how "healthy" neighbourhoods are derived from data on:

- Access to retail outlets (fast food outlets, pubs, off-licences, tobacconists, gambling outlets);
- Access to health services (GPs, hospitals, pharmacies, dentists, leisure services);
- Air quality (green space, air pollution); and,
- Access to natural environment (green spaces including parks and recreational spaces, blue space including rivers, canals and lakes).

It allows researchers and policymakers to understand which areas have poor environments for health and helps to move away from treating features of the environment in isolation to provide a comprehensive measure of neighbourhood quality.

This index shows that access to active greenspace is unequal across the district with many market town neighbourhoods within the worst performing decile nationally Consequently, the Town Delivery Plans may seek to address this disparity – with the built environment playing an important role in delivering healthy, prosperous communities.

Access to greenspace (active)



Source: Access to Healthy Assets and Hazards, 2019

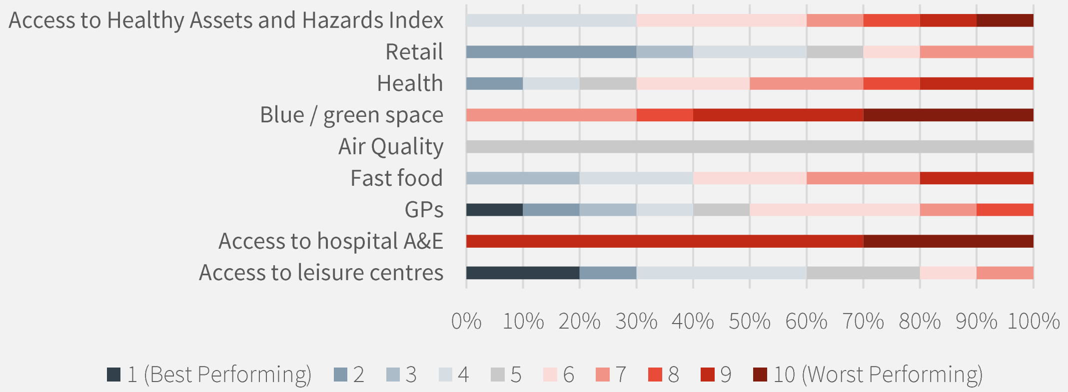
Environmental factors **on health outcomes**

Poor air quality is most prevalent in Breckland's market towns and along key road networks…

The National Atmospheric Emissions Inventory (NAEI) estimates annual pollutant emissions from 1970 to the present day for most pollutants including Nitrogen Oxides (NOx). In areas of high vehicle traffic the amount of nitrogen oxides emitted into the atmosphere as air pollution can be significant. The highest NOx levels in Breckland are found on the key A roads (A11 and A47) and within the five market towns.

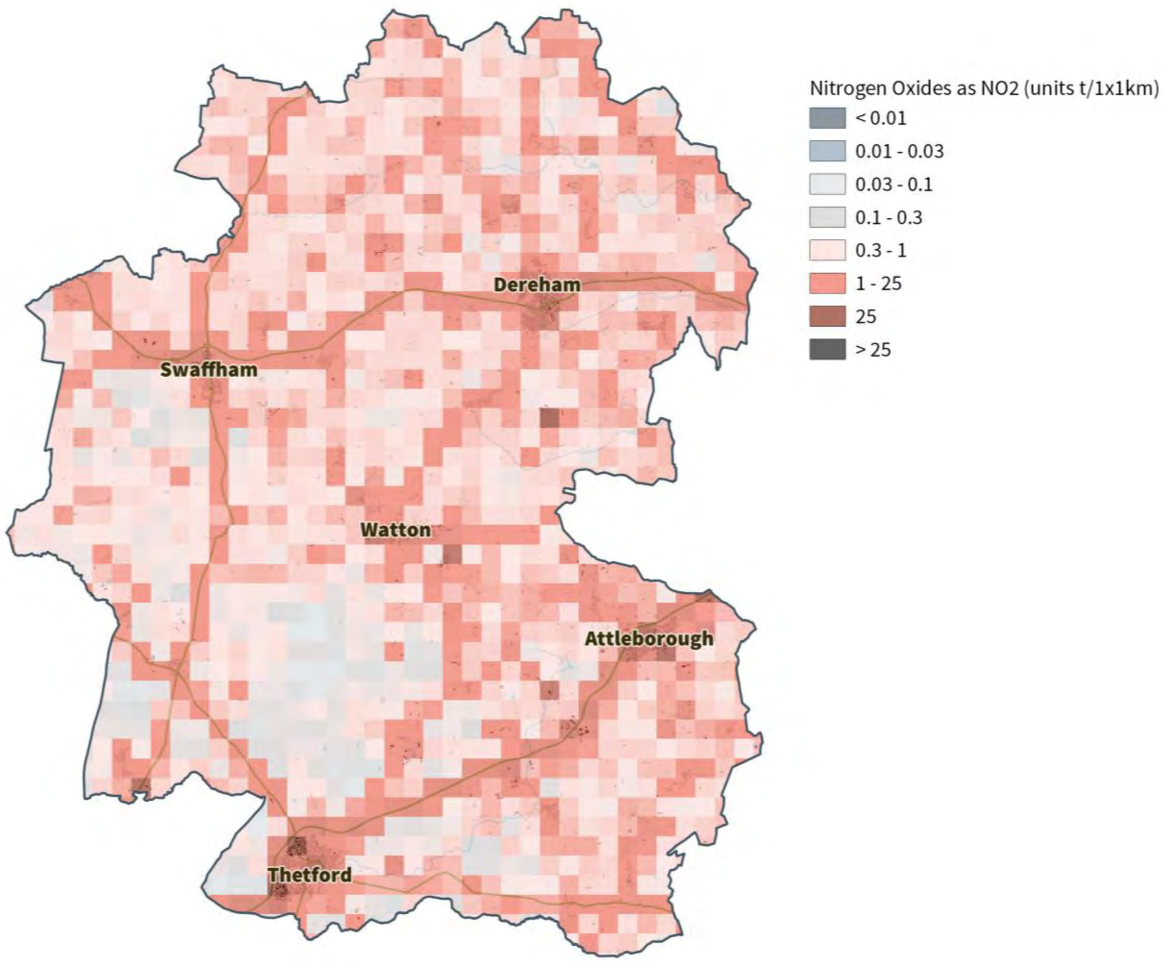
The Access to Health Assets and Hazards (AHAZ) index for Breckland shows that most neighbourhoods in the district are within the worst performing half of areas nationally for access to healthy assets. Access to blue/green space and hospital/A&E are the district's worst performing indicators which could have negative impacts on resident health outcomes.

Access to Healthy Assets and Hazards Index, rank of Breckland's LSOAs by index rating*



*The AHAZ provides a score for every neighbourhood (Lower Super Output Area) based on a range of indicators contributing to resident health. The chart above shows the proportion of LSOAs in Breckland in each decile for each measure. For example, the access to leisure centres domain shows that 80% of LSOAs within Breckland are within the top 50% best performing neighbourhoods nationally.

NOx emissions in Breckland, 2018



Source: AHAZ, NAEI

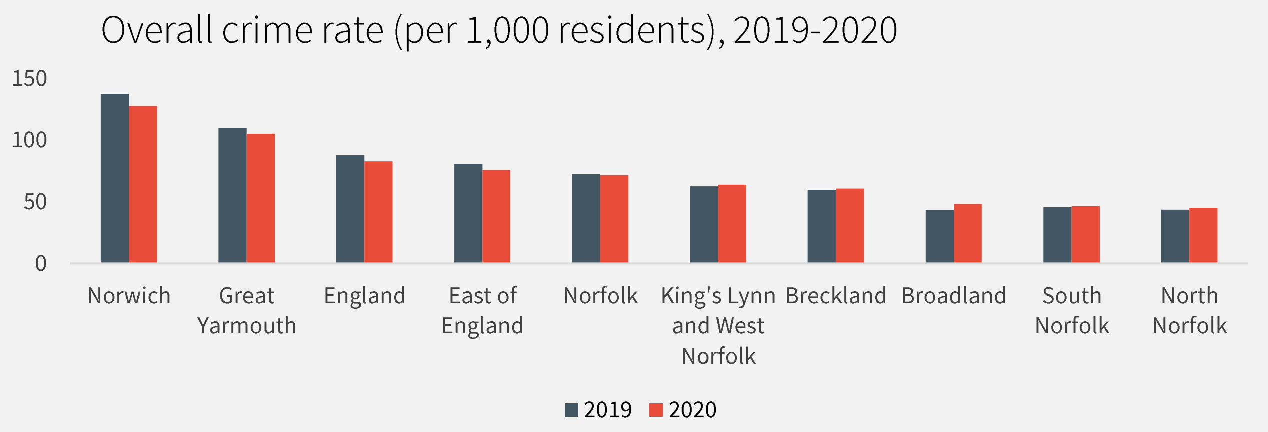
Breckland's **Crime**

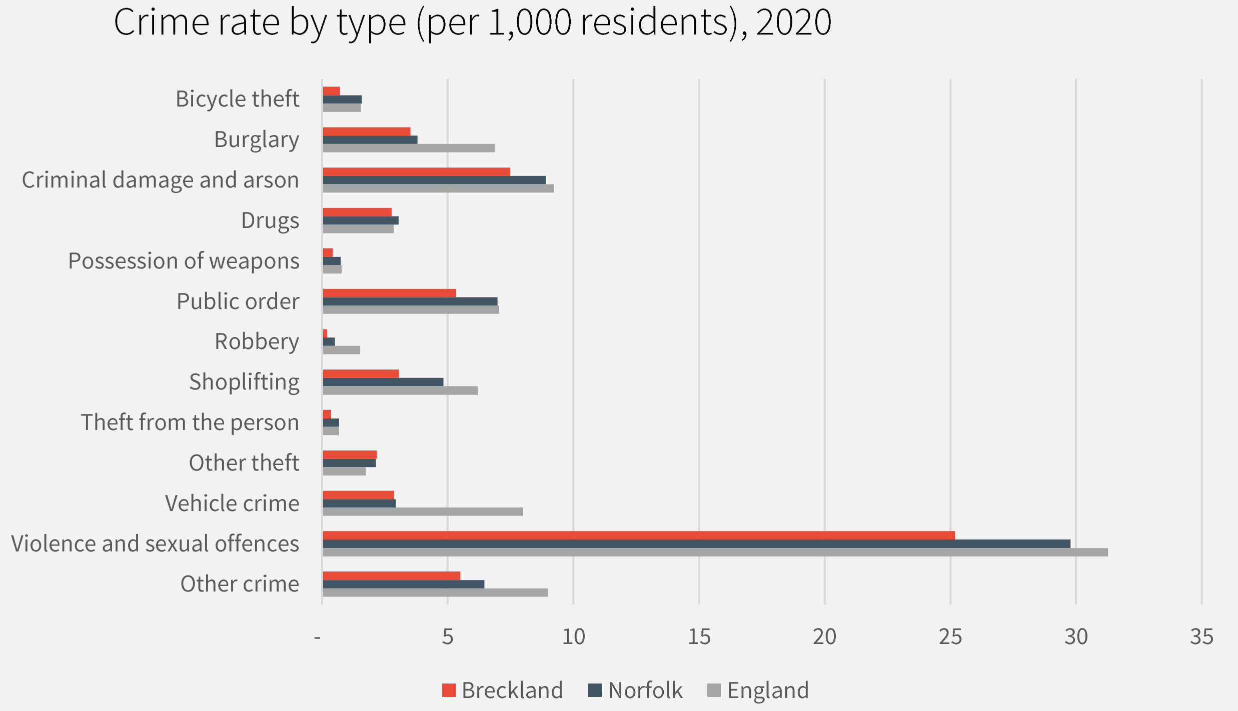
Crime in Breckland is low…

Breckland has some of the lowest crime rates in Norfolk. In 2020, 61 crimes per 1,000 residents were committed in Breckland, which is considerably lower than the Norfolk (71) and England (82.8) averages.

Crime typologies broadly reflect the national and regional averages with the most common crimes in Breckland being anti-social behaviour (20% of all crimes) and violent and sexual offences 40% of all crimes).

Local partnerships have been formed between the Breckland Council and the Norfolk Constabulary through the Breckland Operational Partnership Team. The team works together with local policing teams and other agencies and authorities, to help address anti social behaviour and to support victims and witnesses who have been affected negatively by the behaviour of others.





Source: data.police.uk

In focus: **crime in market towns**

Highest crime rates are in Breckland's largest market towns…

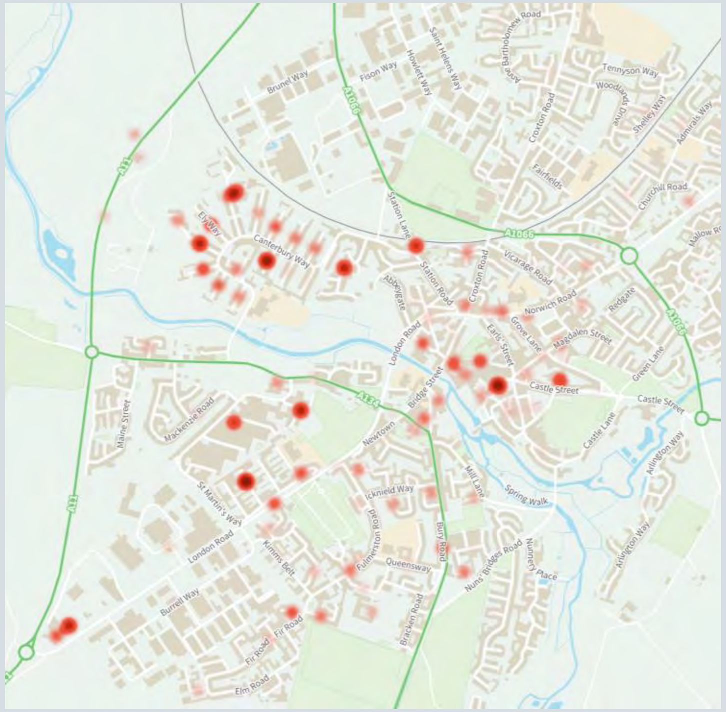
Thetford and Dereham have the highest rates of crime amongst all of Breckland's market towns. In 2020, there were 3,129 crimes committed in Thetford with the largest concentrations to the west of the town centre. Dereham experienced 1,680 crimes over the same period with most in and around the town centre.

Crime rates are broadly consistent with comparator market towns. Whilst 2020 crime statistics in Southwell were very low (23 per 1,000 people), all other towns averaging around 70 which is similar to most towns in Breckland.

Market town crime statistics, 2020

Town	Crimes (Jan 19 – Dec 19)	Crimes (Feb 20 – Jan 21)	Crime per 1,000 people (2020)
Thetford	2,839	3,129	117
Dereham	1,623	1,680	86
Attleborough	504	630	63
Swaffham	791	703	85
Watton	461	600	73
Ely	1,439	1,582	73
Wymondham	1,021	1,241	72
Southwell	201	166	23
Faversham	2,401	2,285	114
Woodbridge	516	605	74

Crime hotspots in Thetford (left) and Dereham (right), 2020



Source: data.police.uk

1.6

Breckland’s Places

Place **Summary**

Breckland's places

Access to Education, Skills and Training is the biggest driver of deprivation in Breckland. 54% of neighbourhoods within Breckland fall within the top 30% most deprived nationally in terms of education, skills and training.

Breckland's digital infrastructure and connectivity currently lags behind national averages. The district performs worse than the national average across all measures of connectivity including: % of properties that meet the Universal Service Obligation; and access to Superfast and Ultrafast broadband

Breckland's rurality means that residents are more reliant on private cars as their primary form of transport. Accessing the nearest 8 key services in Breckland takes an additional 20 minutes by public transport / walking than it does by car. This gap is much wider than the average for East of England (9 minutes) and nationally (6 minutes).

Breckland's commercial property market is dominated by low quality industrial space. Whilst average rental prices are lower than the national and regional averages, space is frequently low quality.

Rising retail vacancies represent a key threat to economic vitality and place perception. High street vacancy rates are highest in Watton (14%) and Thetford (12%).

Whilst house prices are low, affordability remains a challenge for many of Breckland's residents. Over the course of the COVID-19 pandemic, house prices have risen by 10% - meaning the district is becoming increasingly unaffordable for many of Breckland's residents.

Policy implications for Breckland's market towns

1. **Whilst deprivation across Breckland is low, the districts most deprived neighbourhoods are within its market towns.** Almost a third (31%) of neighbourhoods in Breckland's five market towns fall within the most deprived 30% of LSOAs nationally compared to the district average of 21%. Town Delivery Plans could consider targeting interventions where they are likely to have greatest impact.

2. **Slow broadband speeds in market towns could restrict their competitiveness as business destinations unless addressed.** Currently, Ultrafast availability in town centres is limited which could limit the potential for high-street and town centre diversification.

3. **Breckland's lack of public transport connectivity significantly limits the catchments of their market towns.** Transport accessibility is vital for the economic vitality of places and the prosperity of residents that live there. Without good road and rail infrastructure, an area is unlikely to be attractive to business; similarly, without effective public transport, low-income residents without access to a car are excluded from accessing job opportunities and public services.

4. **Quality of commercial space constraining Breckland's growth potential.** The majority of Breckland's commercial property inventory is Grade C space, with some Grade B retail in Thetford and a small amount of Grade B office space in Swaffham. A lack of available, high-quality commercial property

5. **Unique retail characteristics require a bespoke policy response.** Whilst all high streets are required to adapt to technological and consumer behaviour changes, the role and function of Breckland's five centres means that the impact of COVID-19 and the strategic policy response required varies from town-to-town.

Breckland's **Deprivation**

Lack of educational attainment and skills levels in the local population is a key driver of overall deprivation across Breckland…

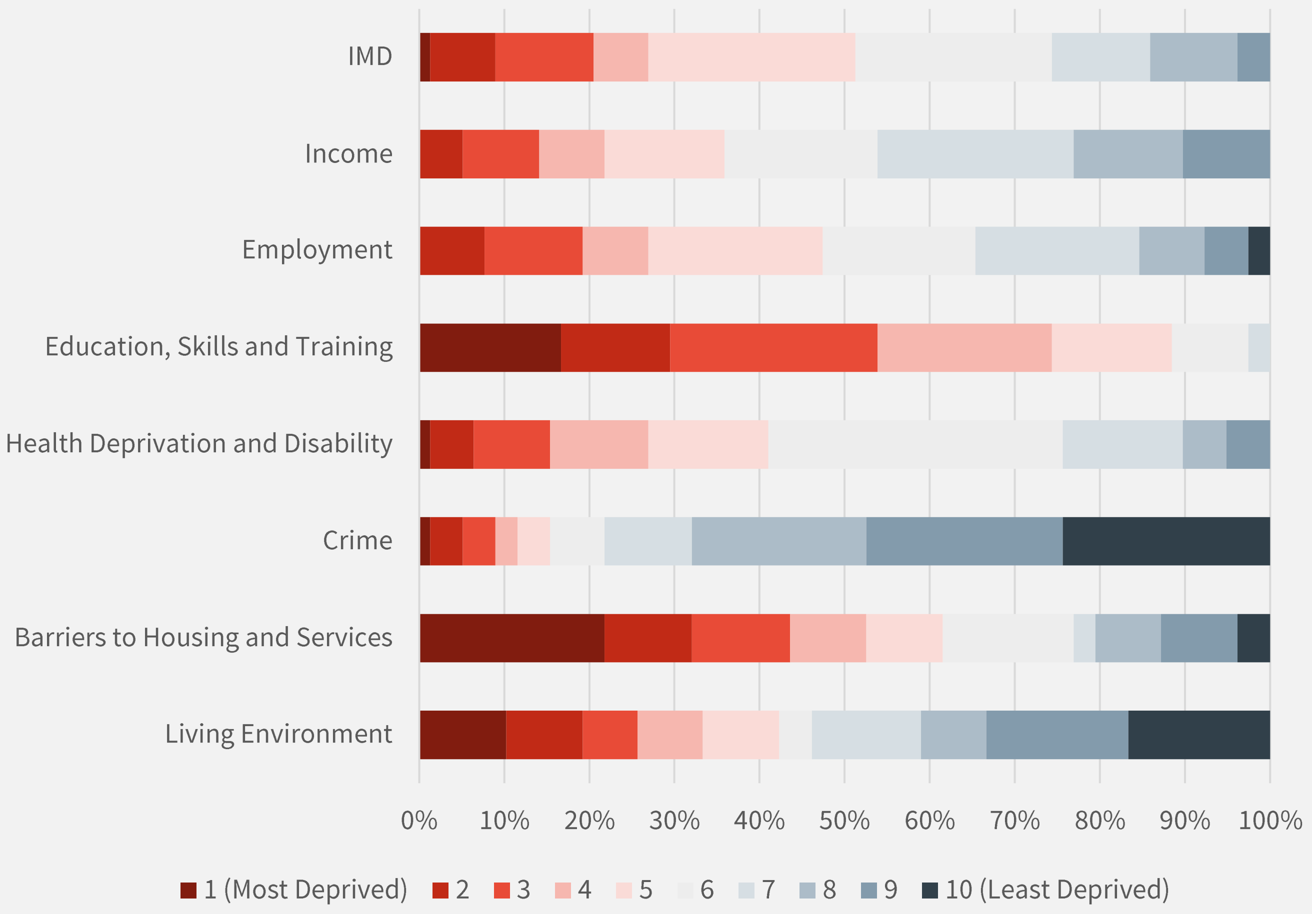
Breckland ranks 127th out of 317 local authorities on the Index of Multiple Deprivation. 21% of neighbourhoods within the district fall within the top 30% most deprived neighbourhoods in the country (Lower Super Output Areas).

54% of neighbourhoods within Breckland fall within the top 30% most deprived nationally in terms of **education, skills and training** – **reflecting the findings in the 'People' section**. This covers a broad range of indicators for both children and young people including:

- **Children and young people:** KS2/KS4 attainment; Secondary school absence; staying in education post 16; entry to Higher Education.
- **Adult skills:** Adults with no or low qualifications; adults who cannot speak English or cannot speak English well.

A high proportion of neighbourhoods also have high levels of deprivation within the barriers to housing and services domain (44% of LSOAs) and living environment (26% of LSOAs).

Proportion of neighbourhoods in Breckland which fall in each decile by deprivation domain



Source: Index of Multiple Deprivation, Ministry of Housing, Communities and Local Government. 2019

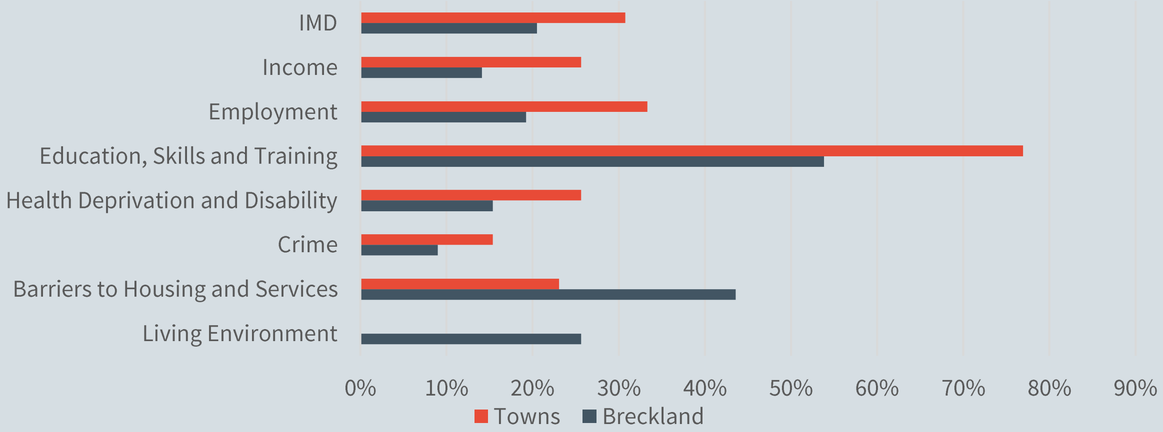
In focus: **deprivation in market towns**

Deprivation is concentrated in Breckland's market towns...

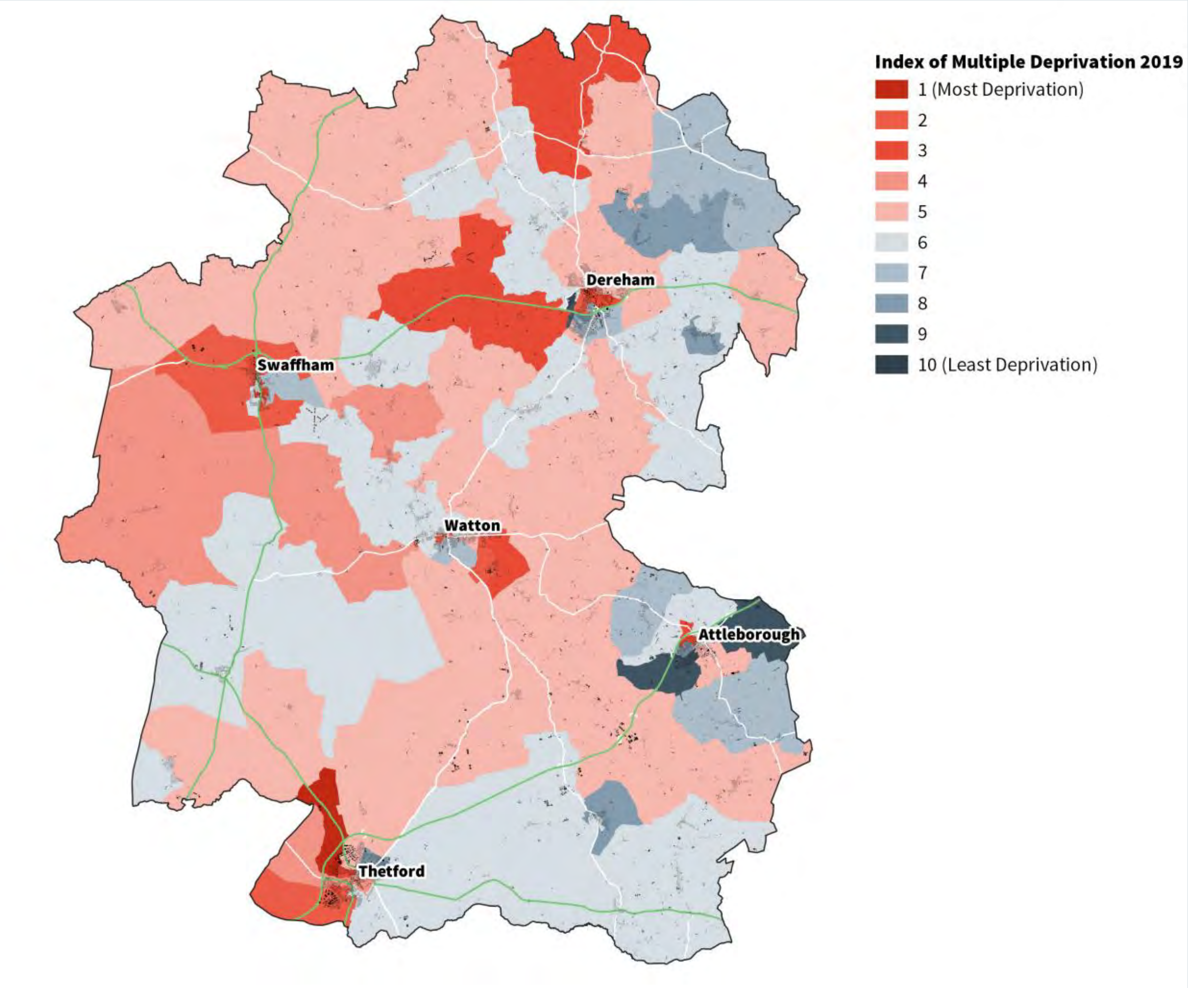
The most deprived neighbourhoods in Breckland are to the west of Thetford, in the centres of Watton, Attleborough and Dereham and to the North of Swaffham. The lowest levels of deprivation are in Breckland's rural areas – indicating a compelling rationale for market town focus and a clear policy imperative for addressing local geographic inequalities.

A higher proportion of neighbourhoods in Breckland's market towns fall within the top 30% most deprived neighbourhoods nationally compared to the district average. Neighbourhoods within market towns have higher concentrations of severe deprivation across education, skills and training, employment, income and crime domains than Breckland as a whole. Breckland's market towns are less deprived with respect to barriers to housing and services and living environment domains than seen at the Breckland level.

Proportion of neighbourhoods which fall in the top 30% most deprived nationally across Breckland's towns and whole district



Index of Multiple Deprivation across Breckland, 2019



Source: Index of Multiple Deprivation, Ministry of Housing, Communities and Local Government. 2019

Breckland's **Digital infrastructure**

Breckland's digital infrastructure lags behind national averages with a lack of ultrafast speeds in market towns...

1 Below the USO

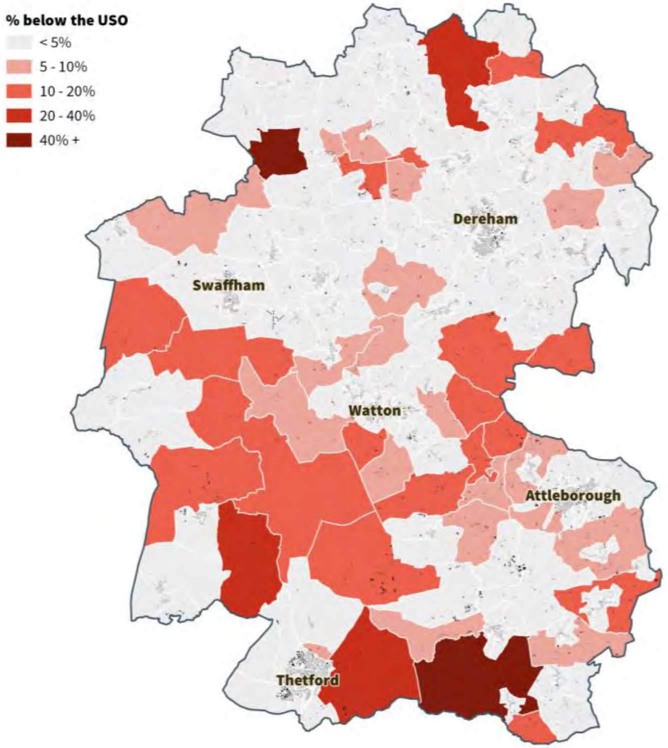
Around **2,000 premises** (3% of all premises) do not have access to the Universal Service Obligation (10 Mbit/s download and 1 Mbit/s upload) compared to only 1% nationally.

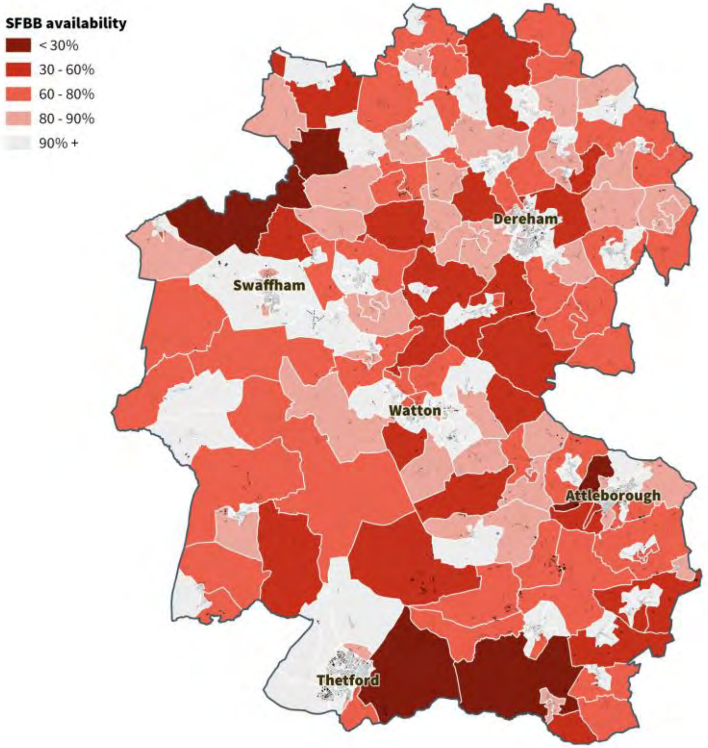
2 Superfast Broadband

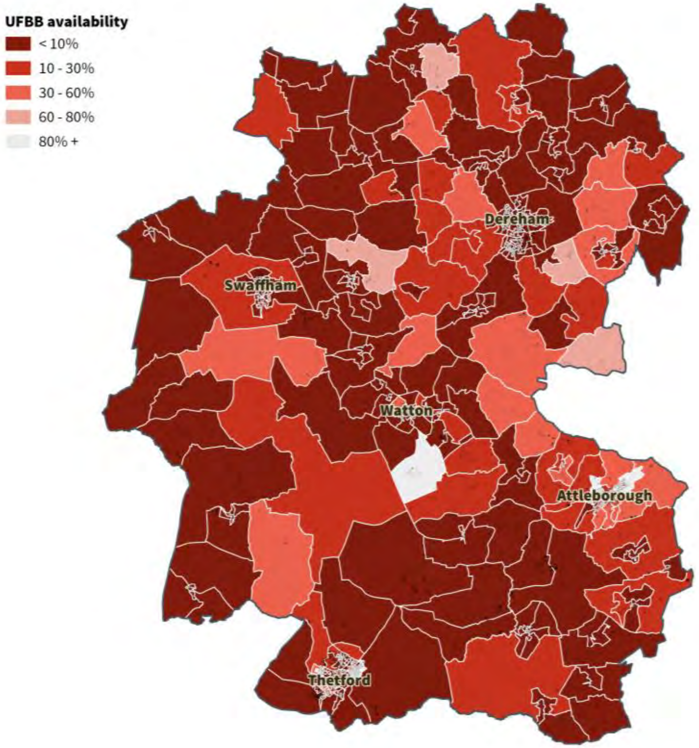
90% of all premises in Breckland can access Superfast speeds (30Mbit/s download) compared to 96% nationally, with **good availability in market towns.**

3 Ultrafast Broadband

Only 16% of all premises in Breckland can access Ultrafast speeds (100Mbit/s download) with particularly **poor coverage in market towns**. This compares to 61% nationally.







Source: Fixed coverage 2011 census output area data, Connected Nations 2020, Ofcom.

In focus: Market Town **digital connectivity**

Digital connectivity varies significantly between market towns which could affect their competitiveness and post-COVID growth opportunity…

The majority of premises within Breckland's market towns meet the Universal Service Obligation with lower proportions falling short than is seen at the Breckland and national level.

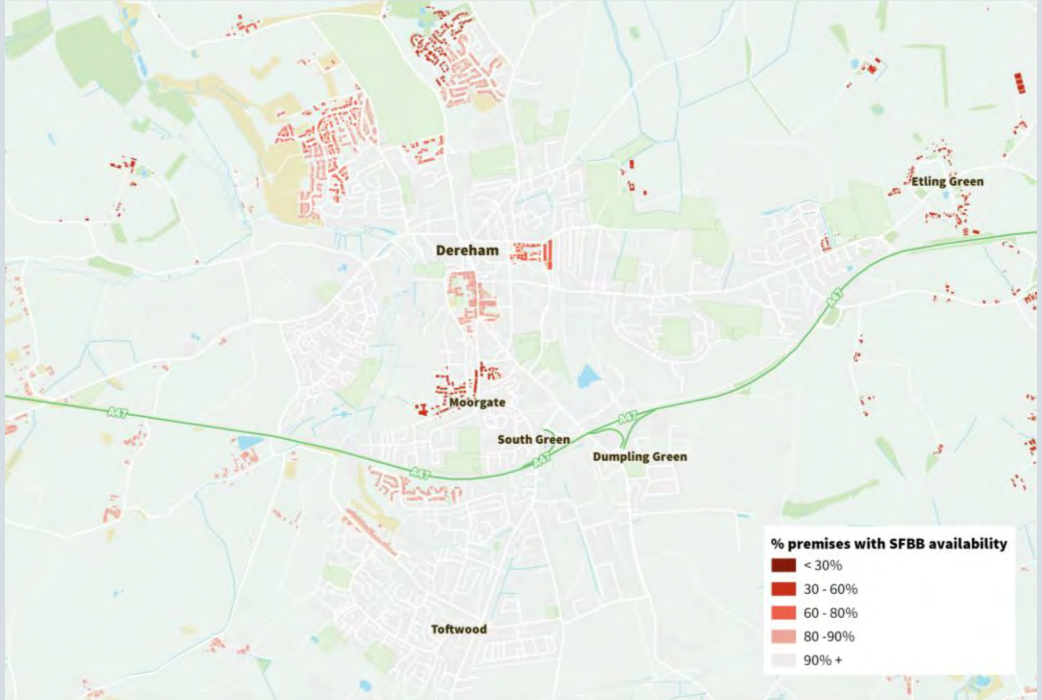
Superfast broadband availability is widespread across all of Breckland's market towns, whilst ability to receive Ultrafast broadband is more variable. Attleborough has the highest proportion of premises able to receive Ultrafast broadband (48%) but availability in Dereham, Watton and Swaffham is particularly low at less than 5% of all premises.

Digital connectivity: number of premises

Town	Proportion of total premises			
	Below the USO	Superfast availability	Ultrafast availability	Total premises
Attleborough	0.8	86.9	47.8	5,041
Dereham	0.2	93.9	0.5	9,389
Swaffham	0.3	97.3	5.0	4,421
Thetford	0.2	96.9	19.7	11,470
Watton	0.1	96.5	3.0	4,359

Source: Fixed coverage 2011 census output area data, Connected Nations 2020, Ofcom.

SFBB connectivity in Dereham



COVID-19 impacts: Remote working

The ability for residential premises to access good quality digital connectivity has been increasingly important during changing working conditions and in particular those jobs which have been asked to work from home, a shift which may continue in the short-term. Breckland's market towns have good access to Superfast speeds (download 30Mbit/s) but availability of Ultrafast speeds (download 100Mbit/s and above) is much lower.

Public transport **in Breckland**

Breckland's residents are reliant on private transport for access to employment and key services, with wider disparities than comparator areas…

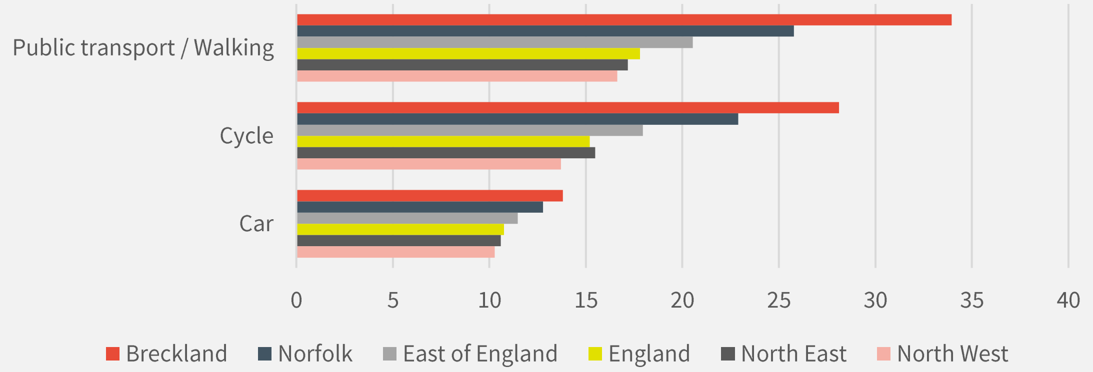
Transport accessibility is vital for the economic vitality of places and the prosperity of residents that live there. Without good road and rail infrastructure, an area is unlikely to be attractive to business; similarly, without effective public transport, low income residents without access to a car are excluded from accessing job opportunities and public services.

Private transport is the predominant travel to work method for Breckland's residents, with transport by car also providing the shortest journey times to key services.

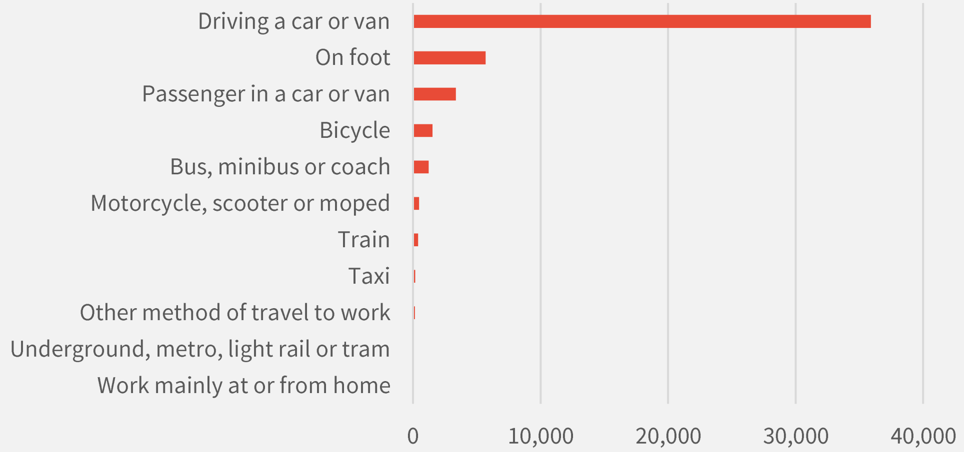
Accessing the nearest key services in Breckland takes an additional 20 minutes on average by public transport / walking than it does by car. This gap is much wider than the average for East of England (9 minutes) and nationally (6 minutes).

A recent All-Party Parliamentary Group report for 'left behind' neighbourhoods showed that counties such as Norfolk contain some of the countries most poorly connected 'left behind' neighbourhoods which is exacerbating challenges of economic vitality and inequality. Many of these areas have seen a reduction in both commercial and local authority supported bus provision which is likely to increase public transport travel times and further isolate rural communities.

Average minimum travel time (minutes) to reach nearest 8 key services



Breckland residents' method of travel to work, 2011



Source: Location of usual residence and place of work by method of travel to work, Census 2011; DfT, Average minimum travel time to reach the nearest key services by mode of travel,, Local Authority, Region and England (2017); Google COVID-19 Community Mobility Reports

In focus: market town **accessibility**

Breckland's market towns are less well connected than their comparators…

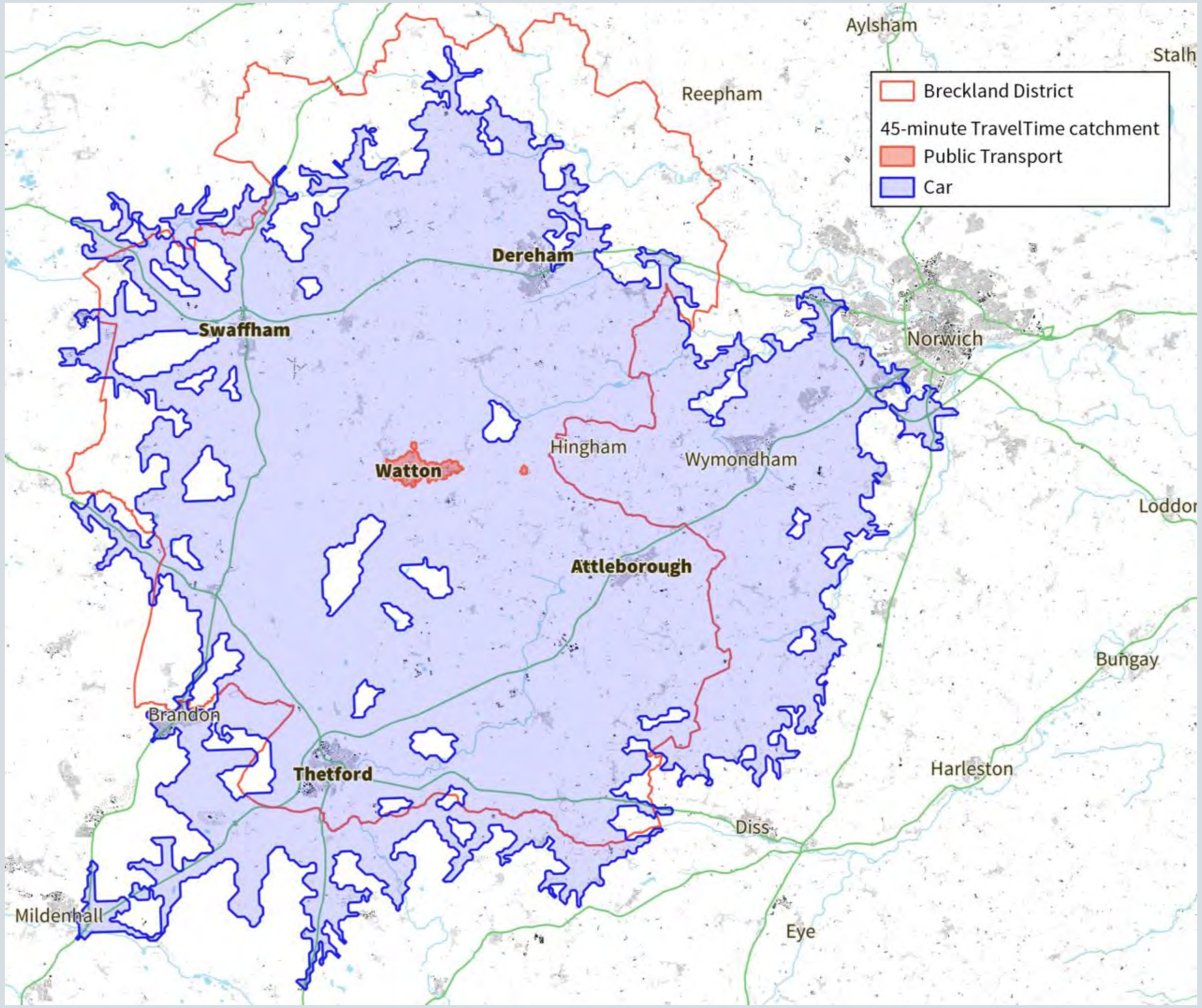
The accessibility of Breckland's five market towns by public transport is very limited. This means that each town is likely to be heavily reliant on private car journeys to access employment opportunities. As a result, providing reliable, effective and affordable public transport solutions will be important for reducing inequality and challenges of low earnings across the district.

45-minute travel time catchments by car and public transport

Town	Total population		Working-aged population (16-64)	
	45min PT	45min drive	45min PT	45min drive
Dereham	70,046	158,907	43,058	90,953
Attleborough	23,291	496,617	13,707	302,654
Watton	8,248	218,404	4,575	127,390
Thetford	22,027	300,942	13,493	177,663
Swaffham	46,358	227,203	26,446	130,195
Ely	20,334	167,427	12,307	102,834
Wymondham	49,931	446,660	31,010	290,389
Southwell	26,605	501,723	15,376	305,547
Faversham	90,787	1,386,494	60,497	848,834
Woodbridge	45,949	277,933	26,217	165,398

Source: iGeolise, ONS Mid Year Population Estimates

Watton's 45-minute travel time catchments by car and public transport

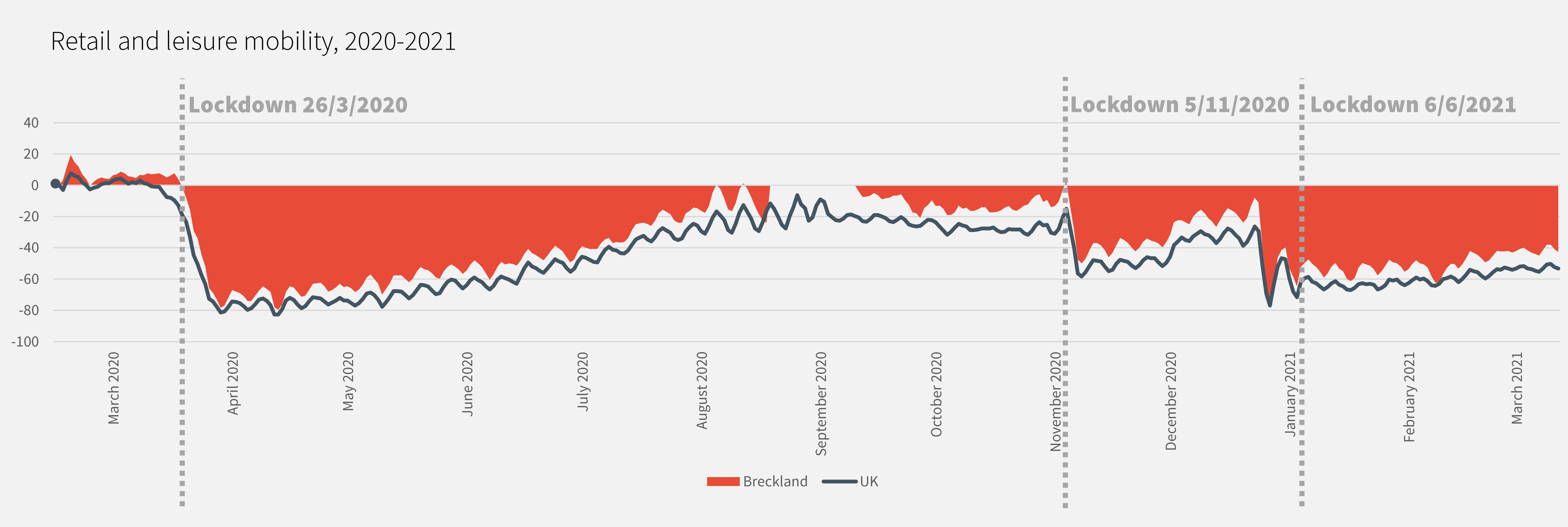


COVID-19 impact: **mobility (1)**

Mobility across retail and leisure destinations was less impacted by lockdowns in Breckland than at the national level…

Since February 2020, Google has recorded the daily movements of people to track the impacts of lockdown on mobility. The mobility statistics are measured against a baseline of zero, which is the median mobility value from the five-week period before COVID-19 (3 January – 6 February 2020).

Following the first national lockdown in March 2020, retail and leisure mobility across Breckland fell to 80% of 2019 levels reinforcing the scale of the challenge facing the district's independent retailers and small businesses. Impacts on other mobility typologies are explored overleaf.



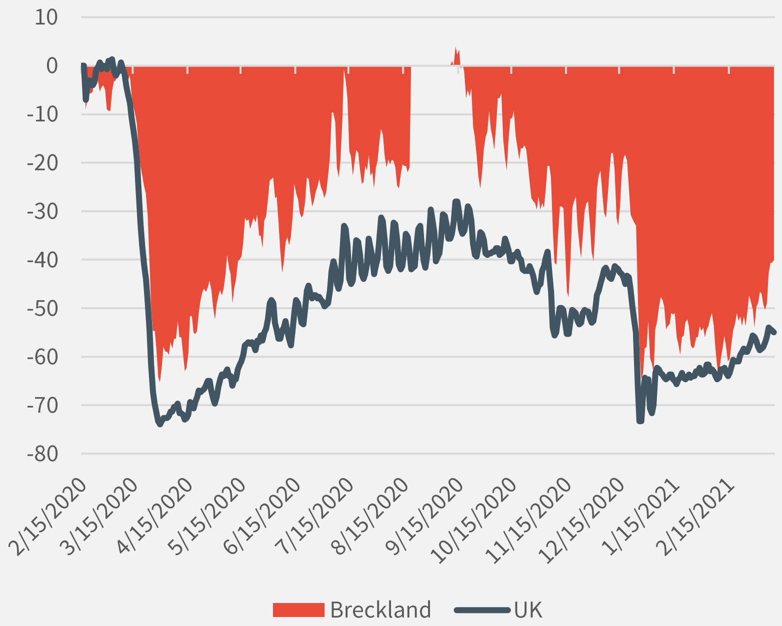
Source: Google COVID-19 Community Mobility Reports

COVID-19 impact: **mobility (2)**

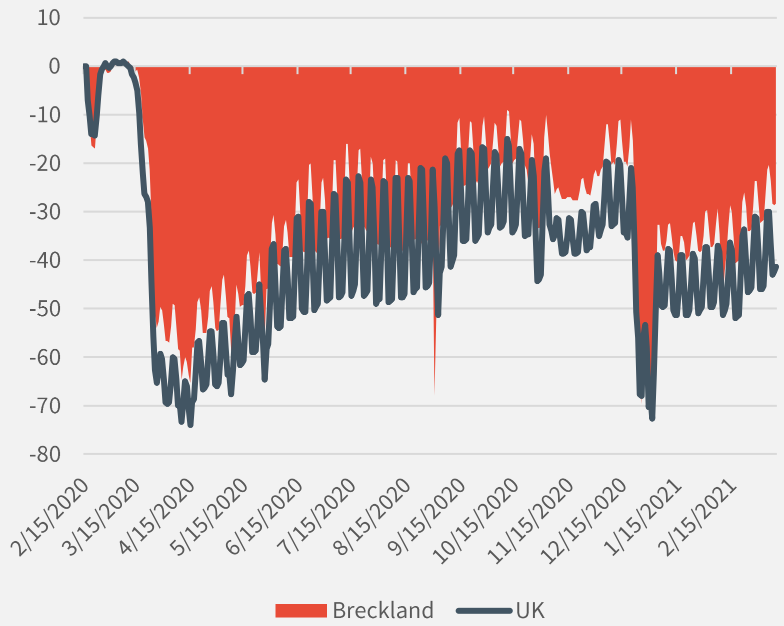
Although mobility impacts across the district were less pronounced than the national averages, there have been fundamental shifts to the way Breckland's residents live, work and travel…

Whilst public transport usage in Breckland is low, for Breckland's residents who do use public transport, their reliance on this method of travel has continued throughout the COVID-19 pandemic, with Google Mobility data demonstrating a lower drop-off in mobility in Breckland's transit hubs compared to the UK average. This is likely to be because those who use public transport are likely to work in sectors that were still operational during national lockdowns and were unable to work from home.

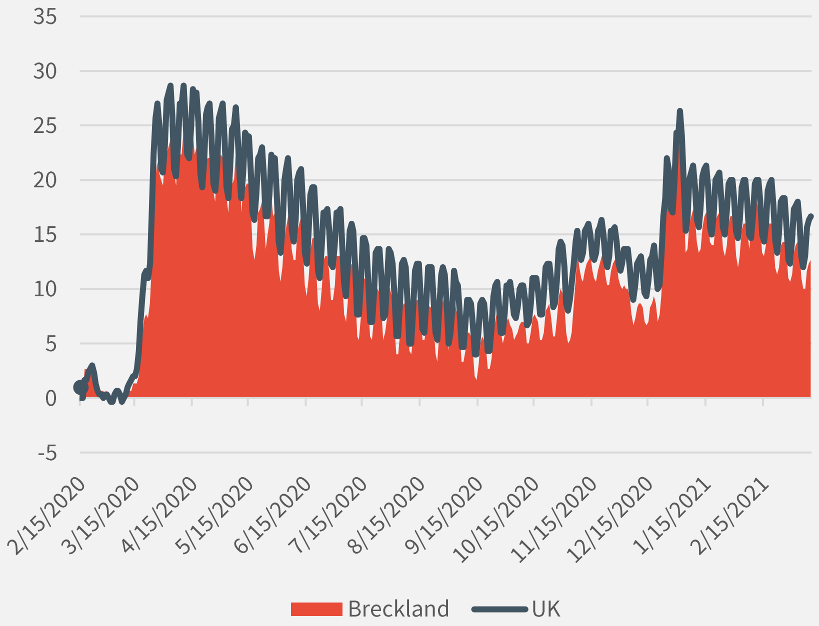
Transit station mobility, 2020-2021



Workplace mobility, 2020-2021



Residential mobility, 2020-2021



Source: Google COVID-19 Community Mobility Reports

Breckland's **commercial property (1)**

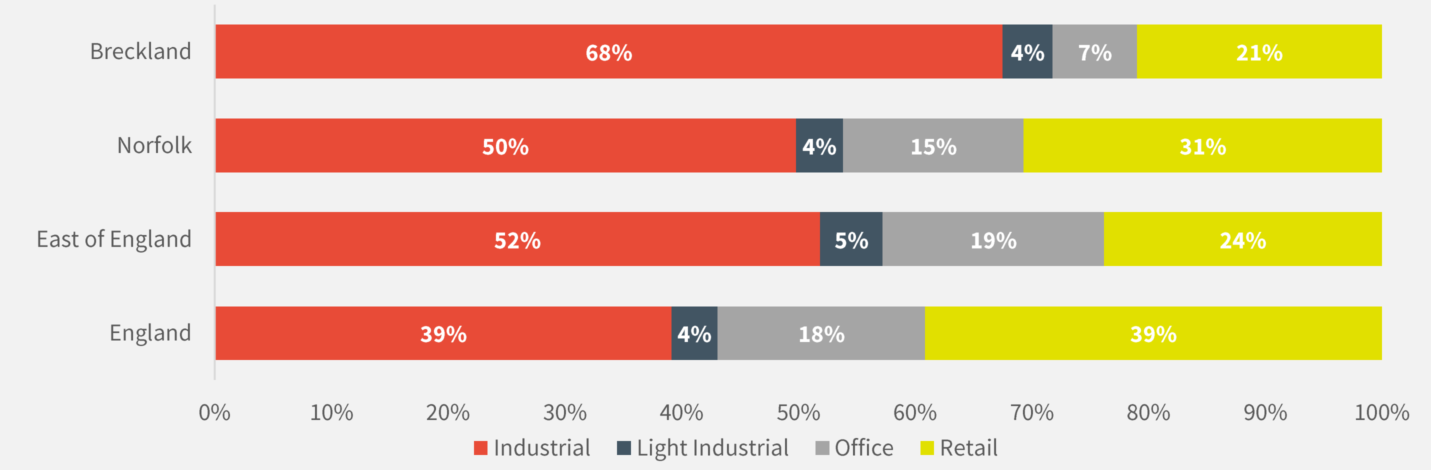
Breckland's commercial property market is dominated by industrial space...

There is 8 million sq ft of commercial floorspace within Breckland, which is comprised of:

+ 5,400,000 sq ft industrial
+ 1,700,000 sq ft retail
+ 578,000 sq ft office
+ 344,000 sq ft light industrial

Industrial floorspace dominates Breckland's commercial property market, with smaller proportions of retail and office floorspace than is seen regionally and nationally as a result.

Property type by floorspace, 2020

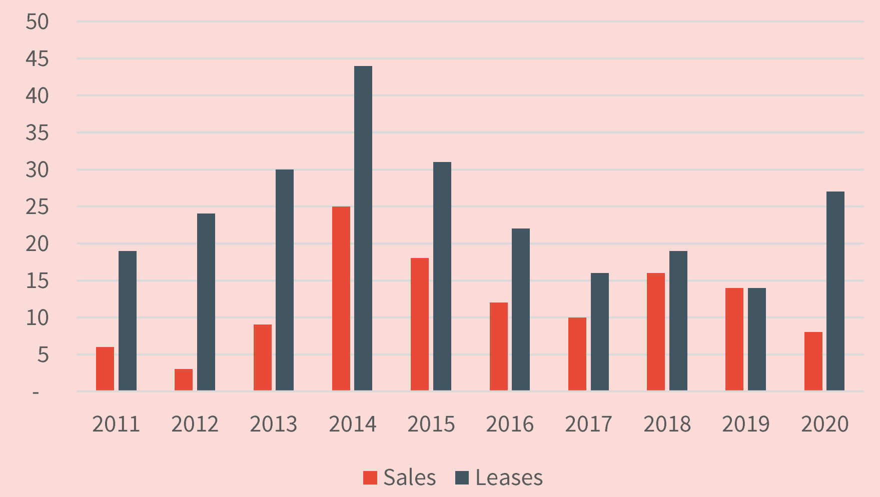


COVID-19 impacts

In 2020, commercial sales in Breckland reached their lowest level since 2012 with sales by floorspace 45% lower in 2020 compared to 2019.

Meanwhile, commercial leases in Breckland reached their highest levels since 2015. The total floorspace leased in Breckland, however, was 47% lower in 2020 compared to 2019. This suggests that commercial leases of smaller space may have been more favourable in Breckland in 2020 than in previous years.

Count of sales and leases in Breckland, 2011-2021



Source: CoStar, 2021

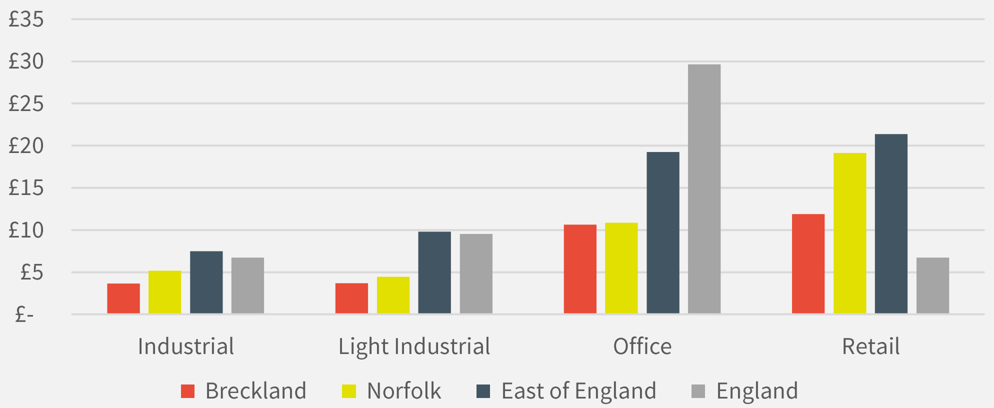
Breckland's **commercial property (2)**

Commercial property market is characterised by low rents and low-quality space...

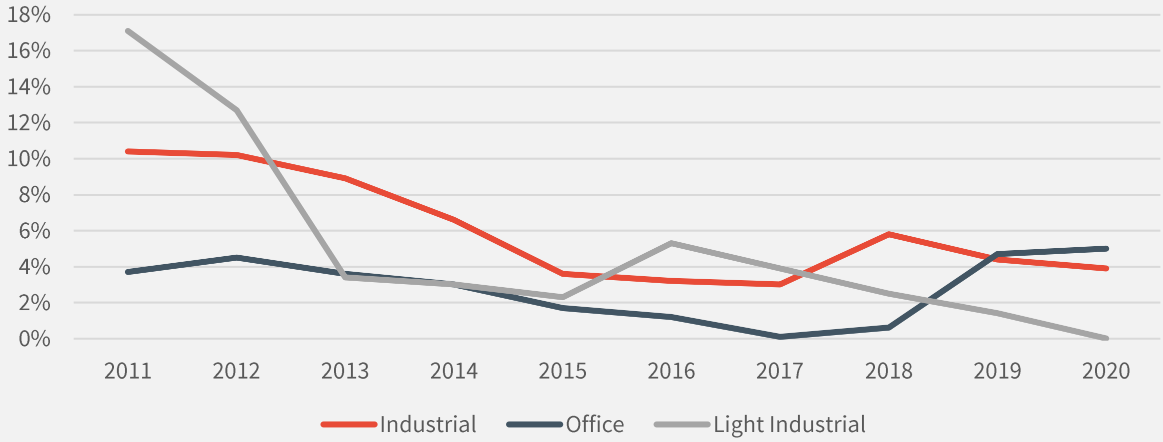
Breckland's commercial property stock is dominated by industrial space, with proportionally more than Norfolk, East of England and England.

Vacancy rates across all industrial and light industrial properties have fallen over the last decade, whilst office vacancy rates have climbed slightly in recent years. Retail vacancy rates have remained consistently lower than other property types over the last decade. Vacancy rates for all are very low and indicate a constrained market.

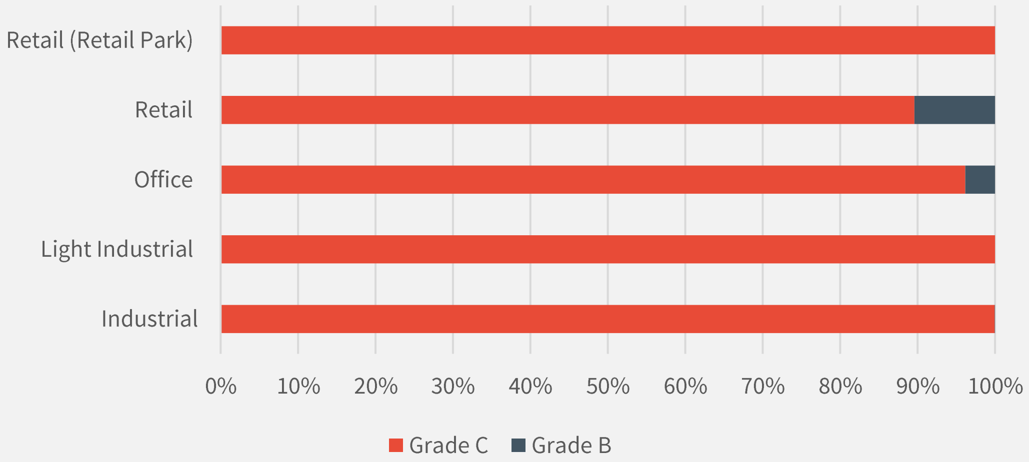
Rent per sq ft by property type, 2020



Vacancy rates in Breckland, 2011-2020



Proportion of floorspace by quality in Breckland, 2020



Source: CoStar, 2021

Breckland's **commercial property (3)**

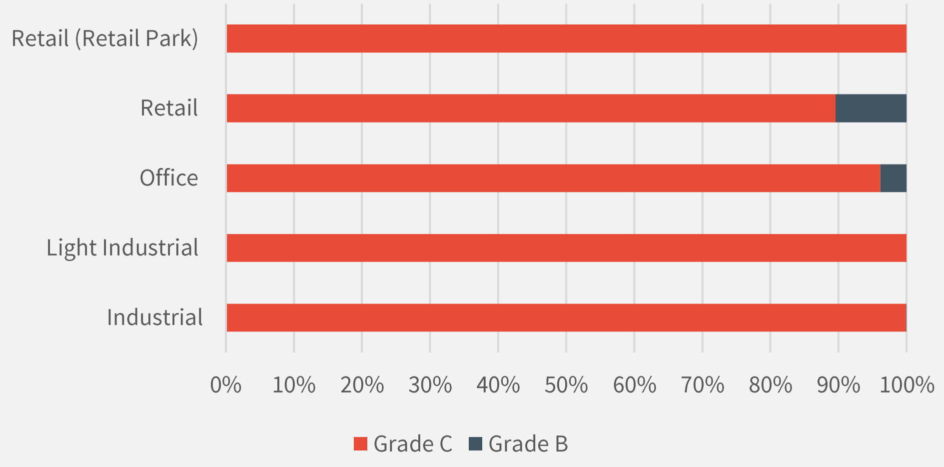
Most of Breckland's commercial property stock is older, lower quality space..

Across the entire district, Breckland only has 22,243sqft of Grade B office space, with the rest (556,131sqft) Grade C – meaning that 99% of commercial space is low quality. The lack of good quality space could affect Breckland's competitiveness with businesses looking to locate in areas with access to high-quality commercial property.

Buildings are classed on relative parameters such as age, location, infrastructure, technology, architecture and amenities. Once assigned, a building's class reflects not only characteristics and attributes evaluated objectively, but also the subjective evaluations of finishes and amenities. Commercial space grades can broadly be categorized as follows:

- **Class A:** typically highly sought-after spaces in desirable locations. Besides their location, what makes them especially enticing is their modern, high-end infrastructure, features and amenities. It may have been built within the last 5-10 years, but if it is older, it has been renovated to maintain its status and provide it many amenities.
- **Class B:** It will typically have ordinary architectural design and structural features, with average interior finish, systems, and floor plans, adequate systems and overall condition. It will typically not have the abundant amenities and location that a class A building will have. They lack prestige and primarily depend lower price to attract tenants and investors. Typical investors are mostly local.
- **Class C:** In general, a class C building is a no-frills, older building that offers basic space. The property has below-average maintenance and management, a mixed or low tenant prestige, and inferior elevators and mechanical/electrical systems. As with Class B buildings, they lack prestige and must depend chiefly on lower price to attract tenants and investors.

Proportion of floorspace by quality in Breckland, 2020



Source: CoStar, 2021

Commercial **property demand**

Sector	Demand	Implications
Industrial/Warehousing/ Logistics	• Effect of the pandemic on online retailing likely to give sector demand a large boost (CBRE Research) • Demand for larger spaces has increased significantly over the last decade (Savills) • Future demand from automotive and manufacturing sectors could trigger significant additional demand for space. Research from Savills suggests that for every £1bn of investment by UK manufacturers triggers a ripple effect for 175,000 sq ft of additional warehouse space needed in the supply chain (Savills).	• With strong demand and weaker supply, rents will rise further, especially for well-located property close to urban centres • The strength of occupier activity in recent years has prompted a wave of speculative development, particularly at the larger end of the market. For units in excess of 50,000 sq ft, an all-time high of 11.5m sq ft of speculative development was under construction at the end of 2020, while a further 13.7m sq ft is expected to come forward during 2021 (LSH) • Despite this, supply remains relatively constrained across most of the UK meaning rents are expected to rise across the east of England. At the end of 2020, availability amounted to 73.4m sq ft, down 6% on a year earlier. Current supply is equivalent to only 1.5 years of average annual take-up (LSH) • Strong demand for well located property on the road network such as the A11/A47
Retail	• Mixed picture for retail with demand further weakened by the pandemic, however opportunities exist in grocery sector, retail parks and exceptional retail assets (i.e. the best units in the best locations) (CBRE)	• Need to reposition and consolidate a significant proportion of town centre retail space • Focus on less but better floorspace with fewer, but fitter operators (Knight Frank)
Office	• Based on CBRE survey evidence a high proportion of corporates are looking to reduce their office footprint, support increased remote working and start to shift towards more agile choice-based work patterns, including greater use of flex space. • Flexibility in employee working locations will be a big theme for 2021, but the long-term trend of office densification and space efficiency seems likely to remain a big driver of office demand. (CBRE)	• Supply & Demand Study conducted for BDC in April 2021 identified a future growth in demand for flexible workspaces, and strongest historic occupier office space demand for smaller spaces

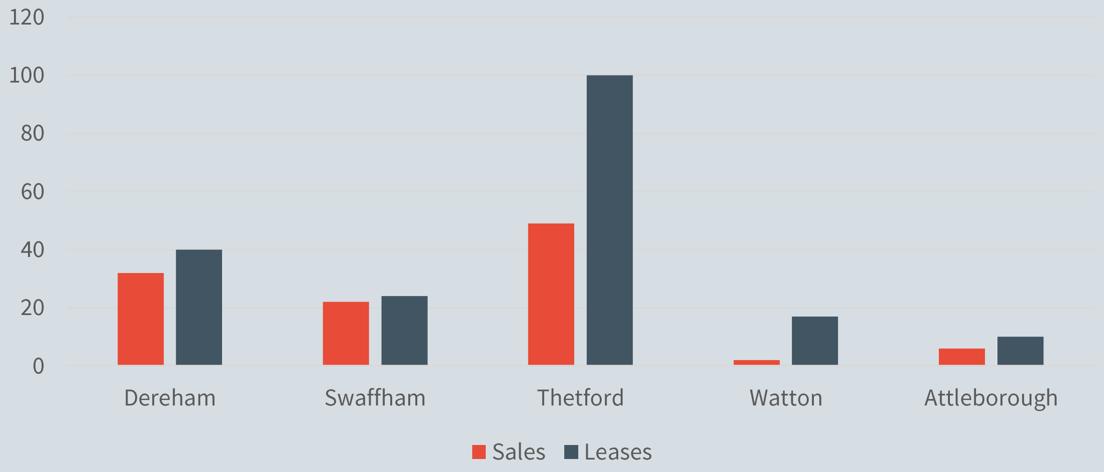
In Focus: market town **commercial property**

Supply of commercial property in market towns is highly constrained, reflected by low vacancies and the need to diversify…

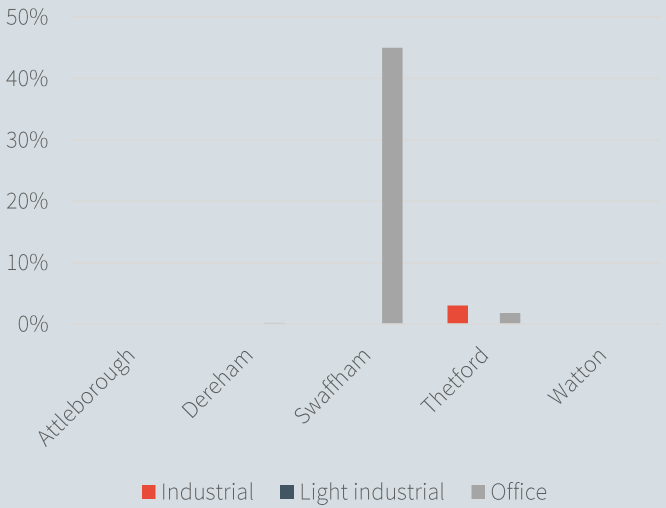
The majority of Breckland's commercial property inventory is Grade C space, with some Grade B retail in Thetford and a small amount of Grade B office space in Swaffham. Thetford contains the district's most active commercial property market with 149 sale and lease completions between 2011 and 2021. Whilst industrial floorspace dominates in the majority of the towns, Dereham is Breckland's most mature office market – containing just under 850,000sqft in 2020.

Vacancy rates by property type are generally low, with the exception of particularly high office vacancy (45%) in Swaffham, and some vacant space (less than 3%) across office and industrial in Thetford. High office vacancy is predominantly being driven by the Green Britain Centre (GBC) which is currently vacant. In 2020, the GBC accounted for 40% of office space in the town.

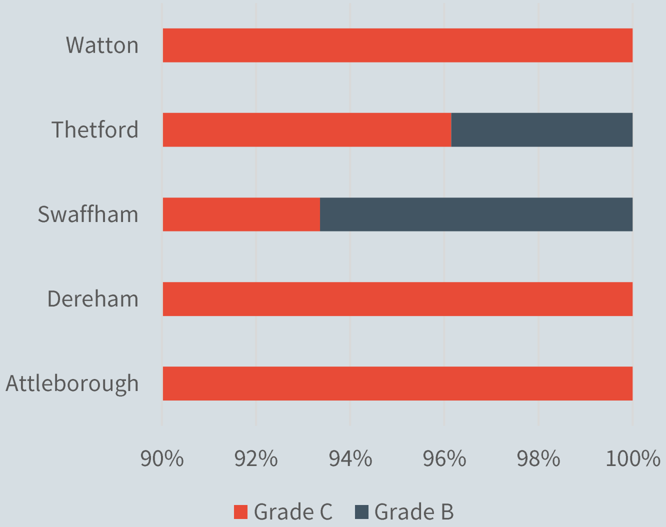
Commercial property transactions, 2011-2021



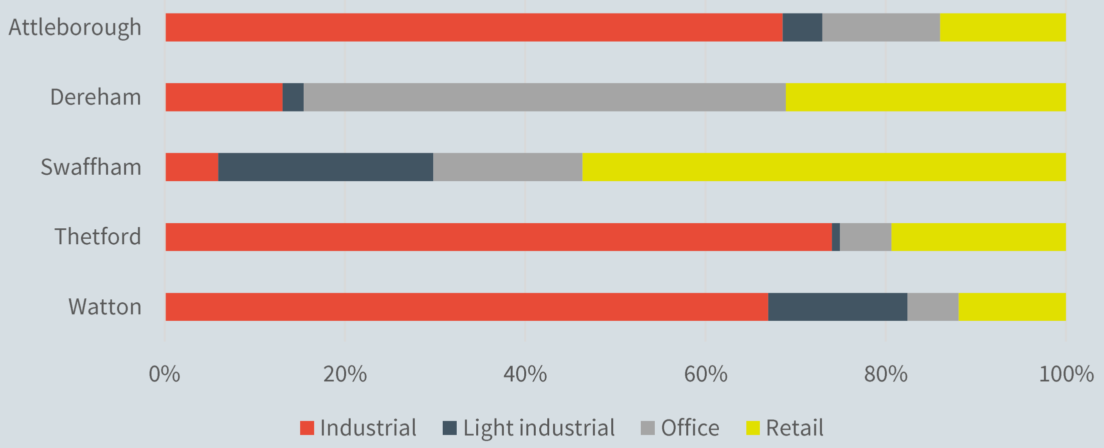
Vacancy rates, 2020



Proportion of floorspace by quality, 2020



Property by floorspace in each town, 2020



Source: CoStar, 2021

In Focus: **Market town retail vacancies**

Rising vacancy rates across Breckland's market towns threaten economic vitality, vibrancy and place perception…

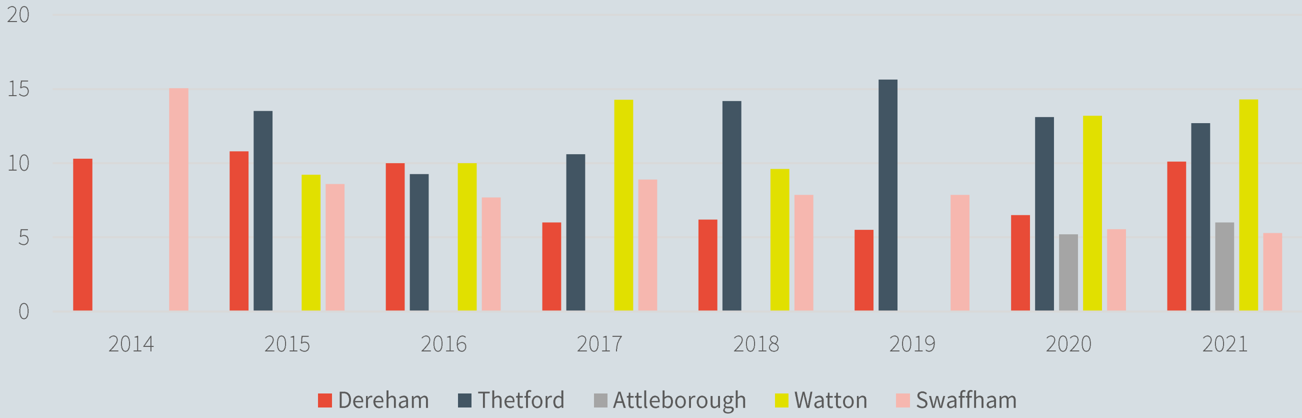
High street vacancy is important as it is the most visible indicator to the public of a place's trajectory and economic performance. Over the last year, vacancy has increased across all market towns except Swaffham. In 2021, the highest vacancy rates were in Watton (14%) and Thetford (13%). This is considerably higher than the comparator market towns, most notably Wymondham which has a vacancy rate of just 1%.

Watton and Thetford also have the highest proportion of persistent vacancies (defined as 3 years + vacant). The Local Data Company consider this to be the most significant indicator of decline in a location. Decline can be considered in different ways but in the context of locations which have a high persistence of long-term vacant units then this indicates an oversupply of space or the wrong format of space. Oversupply can result from shrinking demand as a result of competing centres, demographics or location strategies of 'anchor retailers' along with new channels such as online.

Persistent retail vacancies, 2014-2021

	2014	2015	2016	2017	2018	2019	2020	2021
Swaffham	2.2%	3.3%	2.8%	2.1%	2.7%	2.1%	2.1%	1.0%
Thetford	6.9%	5.6%	6.9%	4.3%	4.6%	4.9%	4.2%	6.6%
Watton	0%	0%	1.8%	1.9%	3%	3.5%	7%	7%
Dereham	1.1%	1.7%	2.5%	2.4%	2.4%	2.2%	1.6%	2.2%
Attleborough							0.0%	0.8%

Retail vacancy, 2014-2021



Retail vacancy versus comparator towns, 2014-2021

	2014	2015	2016	2017	2018	2019	2020	2021
Swaffham	15.1%	8.6%	7.7%	8.9%	7.9%	7.9%	5.6%	5.3%
Thetford		13.5%	9.3%	10.6%	14.2%	15.6%	13.1%	12.7%
Watton		9.2%	10.0%	14.3%	9.6%		13.2%	14.3%
Dereham	10.3%	10.8%	10.0%	6.0%	6.2%	5.5%	6.5%	10.1%
Attleborough							5.2%	6.0%
Ely	8.2%	5.0%	3.8%	1.4%	5.7%	4.3%	6.6%	7.0%
Faversham		10.2%	5.6%	9.8%	6.7%	5.5%	9.2%	6.3%
Woodbridge	5.7%	6.3%	8.3%	7.4%	7.3%	6.7%	9.2%	9.9%
Wymondham		1.3%	7.5%	5.1%	5.1%	6.3%	5.3%	1.2%
Southwell							4.3%	4.2%

Note: blank cells indicate that no field visit took place in that year

Source: Local Data Company

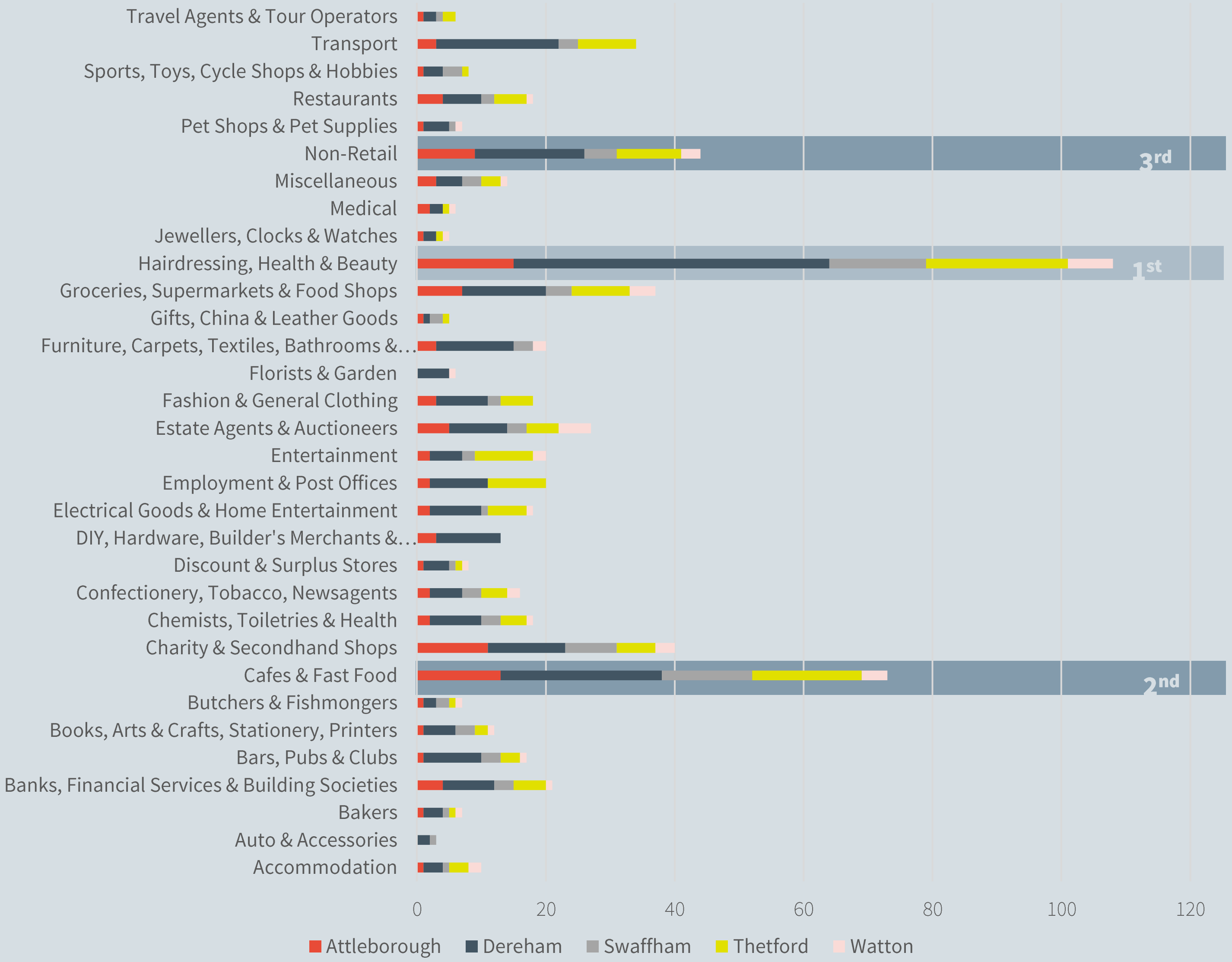
In focus: Market town **retailer mix**

Experience-led retail can help to underpin Breckland's future resilience…

Although traditional retail stores account for a significant proportion of units on market town high streets, hairdressing, health and beauty; cafes and fast food; and non-retail are the most common category across Breckland's market towns.

Due to the direct competition from online retailers and changing consumer behaviour, it has become increasingly difficult for physical retailers to keep pace in terms of value and convenience. As a result, by offering 'experiences' on the high street (though cafes and beauticians etc.) for services that cannot be purchased online can help to combat rising high street vacancies. This should be seen as part of an integrated strategy to diversify and reimagine these centres as places for social, economic and cultural exchange.

Retailer mix in Breckland's market towns, 2021



Source: Local Data Company

In focus: **COVID-19 retail impacts**

The of COVID impact on town centres will be dictated by local retail mix…

England's lockdown restrictions have impacted the retail vitality of certain centres to a greater extent than others. Whilst all non-essential retail was closed in the first and second national lockdowns, 'essential' retail such as pharmacists, off licences and supermarkets could remain open.

The proportion of essential retail amongst the five market towns varies significantly. Whilst over a third (35%) of Attleborough's retail units are deemed essential, only 20% of Thetford's units could remain open. Whilst some retailers established online/'click & collect' models many stores have gone several months without trading between March 2020 and April 2021.

It has been suggested that lockdown has accelerated the decline of high street retail whilst boosting the growth of online sales. The most recent data published by the Office for National Statistics shows that as of November 2020, online sales in businesses in this category grew by 157% compared to the same month in the previous year.

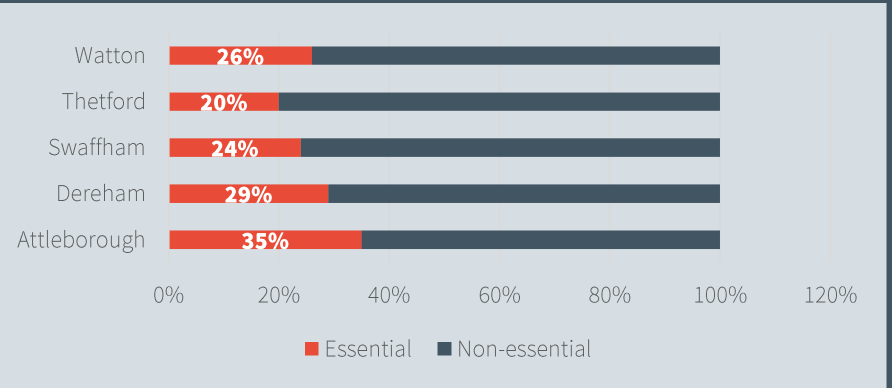
To assess the impact this is having on vacancies, the Local Data Company has analysed reopening rates across Breckland's market towns. The field visit date largely dictates reopening rates based on ability to trade depending on the national/local restrictions at the time of visit, however the data shows a notable uptick in the proportion of premises recorded as 'closed to vacant'. This shows that Swaffham has seen the greatest rise in vacancies – rising by 12% compared to the last field visit pre-lockdown.

Reopening rates, 2020/2021

	Field visit date	Closed	Closed to vacant	Reopened
Dereham	Oct-20	6%	9%	55%
Watton	Oct-20	0%	6%	65%
Swaffham	Nov-20	61%	12%	11%
Thetford	Nov-20	54%	6%	20%
Wymondham	Oct-20	0%	5%	72%
Woodbridge	Nov-20	52%	11%	16%
Ely	Jan-21	59%	10%	13%
Faversham	Jan-21	42%	7%	30%

Note: Southwell and Attleborough have not had a field visit since lockdown

COVID-19 impacts: Essential retail



Source: Local Data Company, ONS

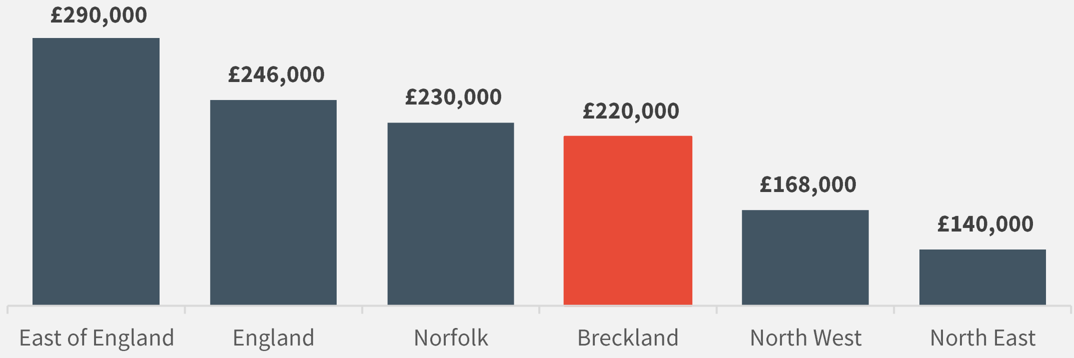
Breckland's **housing**

Breckland's house prices are significantly lower than national and regional averages...

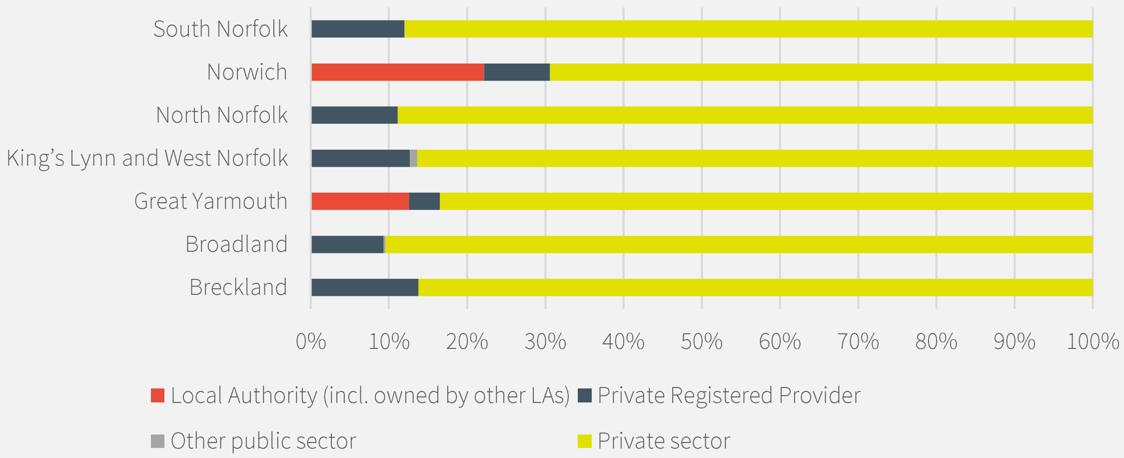
Median house prices in Breckland are £220,000 which is lower than the Norfolk, regional and national averages. House price growth over the last 20 years demonstrates house prices in Breckland have consistently trailed below regional averages, with 10-year growth rates of 43% in Breckland compared to 45% in Norfolk and 57% across the East of England.

Breckland, like most of the Norfolk's housing stock is privately held. 86% is private sector housing, and the other 14% comprises Private Registered Provider (PRP) stocks. PRPs range from charities and Community Interest Companies, to not-for-profit housing associations, to for-profit specialist housing providers.

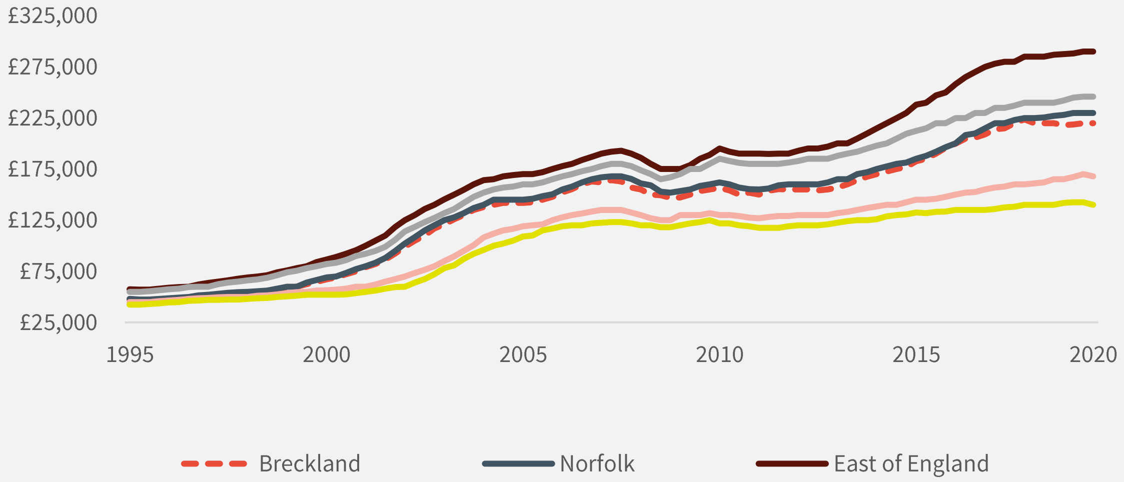
Median house price, June 2020



Housing by tenure, 2019



Median house price 1995-2020



Source: MHCLG

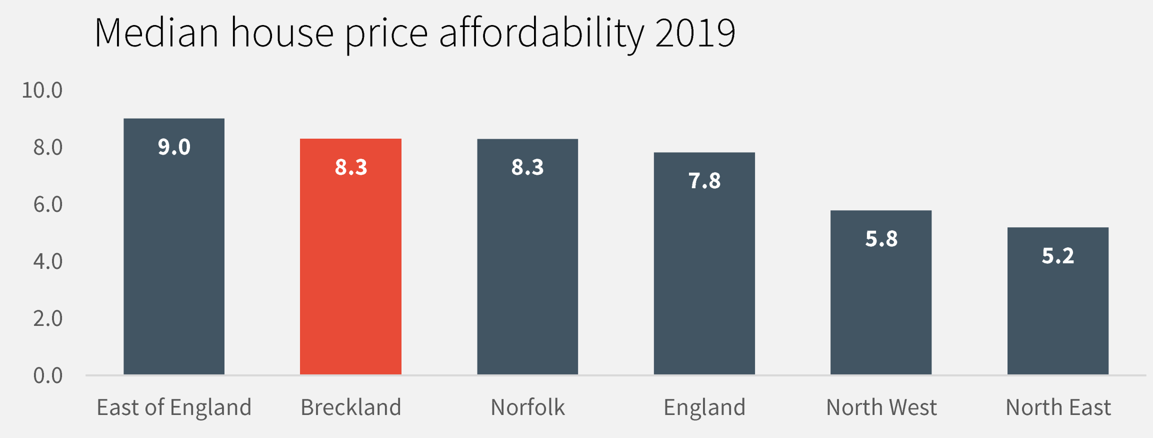
Housing **affordability**

Despite low median property prices, affording a home is still out of reach for many of Breckland's residents...

Whilst average house prices across the district are lower than the national and regional averages, housing affordability is an issue due to low average wages of Breckland's residents.

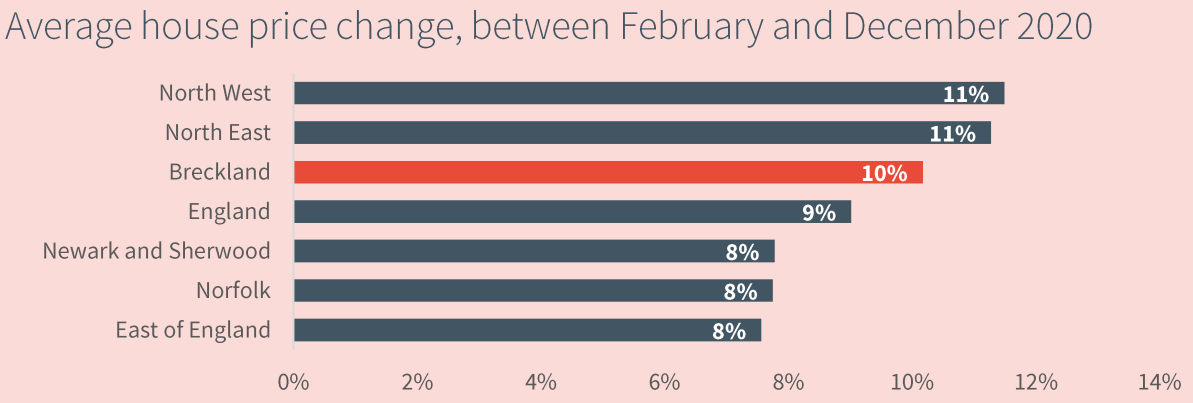
In 2019, the average cost of a property in Breckland was over 8 times average annual earnings. This is considerably higher than the national average (7.3x) and comparator regions such as the North East (5.2x) and North West (5.8x). Recent data shows that this is likely to be exacerbated by the pandemic, with house prices rising sharply throughout 2020. Over that period, average house prices grew by 10% which was higher than the England (9%) and regional (8%) averages.

Property search website Rightmove has reported increased searches for properties outside of cities, leading some commentators to suggest that the pandemic has catalysed an urban exodus for people in search of more space. Whilst this could create opportunities to attract a new highly-skilled workforce to support Breckland's future growth, it will be important that housing provision keeps pace with demand to ensure that Breckland's existing population can still afford to live and work in the district.



COVID-19 impacts

House prices increased by an average of 10% between February and December 2020, exceeding growth seen regionally and nationally.



Source: MHCLG, ASHE, Rightmove

1.7

Making the case for Breckland

HATCH

The need to **'level up' Breckland**

Social mobility and attainment

306th

Local authority out of 346 for social mobility, limiting the life chances of our most disadvantaged residents

27%

of residents are educated to degree-level, which is 10% less than the England average and well below the North East and North West…

However…

57%

Have NVQ Levels 1-3, showing that attainment, aspiration and progression are key challenges for residents…

…Breckland's market towns are Higher Education coldspots, with only 17% of Thetford's young people going into higher education

Demographics and health

68%

of residents are overweight or obese which is higher than the England average of 62% and the North East and West

25%

of residents are over 65+ meaning Breckland has an ageing population…

…65+ is the district's fastest growing age group, growing by 56% over the last 2 decades

COVID-19 impact

£268m

of output lost due to COVID-19…

…sectors most affected by lockdown are accommodation and food services losing £44m of output in 2020

Economic resilience

Largest business sectors of manufacturing and agriculture have seen a reduction of jobs over the last decade which is likely to increase due to technological advancements and automation. There is therefore a need to diversify the local economy to protect jobs and livelihoods.

Transport and digital infrastructure

34 minutes

Is the average minimum walking and public transport travel time to reach the nearest 8 key services which is nearly 2x longer than the England average…

…this means that Breckland residents are heavily reliant on private vehicles to get to work and access services. This disadvantages poorer residents who cannot afford a car, excluding them from accessing local opportunities *and* creates air pollution problems

36,000 residents' drive a car or van to work

Only 16%

of all premises in Breckland can access Ultrafast speeds (100Mbit/s download) with particularly poor coverage in market towns. This compares to 61% nationally.

Place vitality

99%

Of all of Breckland's commercial property is low quality…

…whilst vacancy rates are low, the lack of diversity of commercial property is limiting potential for investment and economic diversification

12%

Retail vacancy in Thetford affecting place perception and vitality

Realising **Breckland's growth opportunity**

Housing delivery and population growth

15,000+
New homes to be delivered by 2036

110%
Of MHCLG home target requirement delivered over the last 3 years

10%
Average house price growth in 2020. This is higher than the England (9%) and Norfolk (8%) averages…

…A unique opportunity for Breckland and its market towns to capture the urban exodus catalysed by COVID-19. Using the Town Delivery Plans to make Breckland the district of choice for urban professionals to accelerate growth and the diversification of Breckland's economy

Breckland's population has grown by 18% since 1999

Building on solid economic foundations

23,000+
Of Breckland's residents commute outside of the district for work due to the district only having 0.7 jobs for every working age resident

+

3%
Unemployment rate in 2019…

…indicates a constrained local labour market. By creating more opportunities for residents to live and work locally can retain wealth within the local economy

Economic and employment structure can catalyse a strong economic recovery from COVID-19. Uptake of government COVID-19 support and increases in benefit claimants have remained significantly lower than the national average

3x
More specialised in Agriculture businesses than the UK average. The success of the sector is vital for the region's economic prosperity and the country's food security

108%
Growth in food manufacturing employment over the last 10 years. Breckland retains several highly-specialized sectors which can be leveraged to support the district's future prosperity

21st century market towns

Safe places

Building on what makes market towns attractive places to live. 61 crimes per 100,000 residents in Breckland compared to the England average of 83

Reimagining retail

Hairdressing, Health and Beauty are the most common retail outlet on Breckland's high streets. Responding to trends in consumer behaviour by curating an experiential led high-street can underpin their growth and resilience

Green and social infrastructure

Whilst Breckland as a whole has high natural capital, access to green space in market towns is limited. Town Delivery Plans offer the opportunity to take a holistic view of growth – prioritising both economic prosperity and wellbeing

1.2m sqft
Of office space across Breckland's market towns. However, the majority of this is located in Dereham. There is an opportunity to provide the right mix of commercial property to create the conditions for growth

2.1

Town Deep-Dive: Dereham

Dereham's economic **history**

Commerce and industry defining 'new' Dereham

Following a long agricultural past, multiple fires destroyed the original architecture of the town. The oldest parts of new Dereham are Georgian in character – with commercial prosperity driven by the brewing and building industries. This created the wealth to build the historic buildings still found concentrated around the market square and surrounding streets today.

1

Connecting Dereham to the world

A combination of the agricultural revolution and the construction of the town's gasworks in 1835 meant that efficient bulk transport was needed to support economic growth. This was addressed by the railway which arrived in 1847. The new line to Wymondham linked Dereham to the national rail network, allowing an array of heavy industry to establish, such as the St. Nicholas ironworks.

2

A rich industrial past

The railway enabled a core of heavy industry in Dereham which helped to underpin the town's prosperity throughout the 19th and 20th Centuries. A modern waterworks was built in 1881 on Cemetery Road and is still one of Dereham's most distinctive buildings. The malting industry established a complex near the railway station, and there were steam powered leather and shoe industries, a world class coach maker, and in the twentieth century the UK's largest maker of clocks, Metamec – employing 800 people at its peak.

3

Architecture for a changing town

The transition to industrial and post-industrial economies was accompanied by a change in the nature of the urban space. Widely spaced Georgian architecture gave way to Victorian terraced housing, and more recently, high density estate developments of the 1970/80s. This later style of estate housing has left little room in the town for greenspace which remains a key spatial deficit for the town today.

4

Source: Dereham Green Infrastructure Study and Implementation Strategy

Local **policy review**

Over the planning period, Dereham is expected to accommodate at least:

1,784 new homes

3 hectares of new employment land

To deliver this, key sites include:

1. **Greenfields Road:** 48 dwellings
2. **Swanton Road:** 216 dwellings
3. **Etling View**: 60 dwellings
4. **Shipdham Road (west):** 130 dwellings
5. **Shipdham Road (east):** 290 dwellings
6. **Dereham Hospital:** 60 dwellings
7. **Employment designation**

Dereham's key development sites and Local Plan allocations

Source: Breckland Local Plan

Economic **Function**

Dereham's businesses

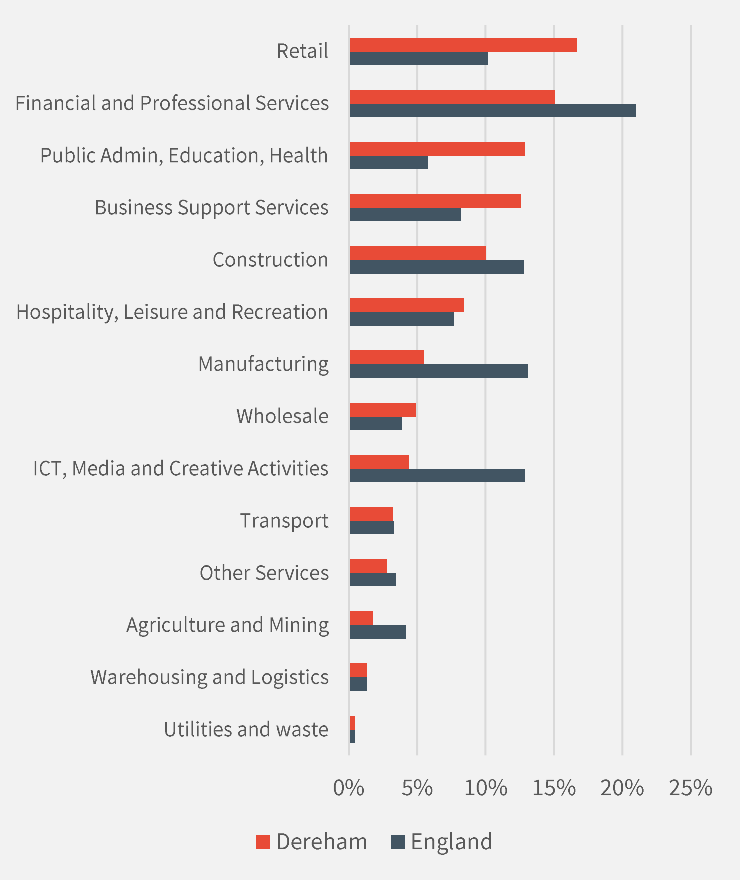
Dereham is home to around 680 businesses.

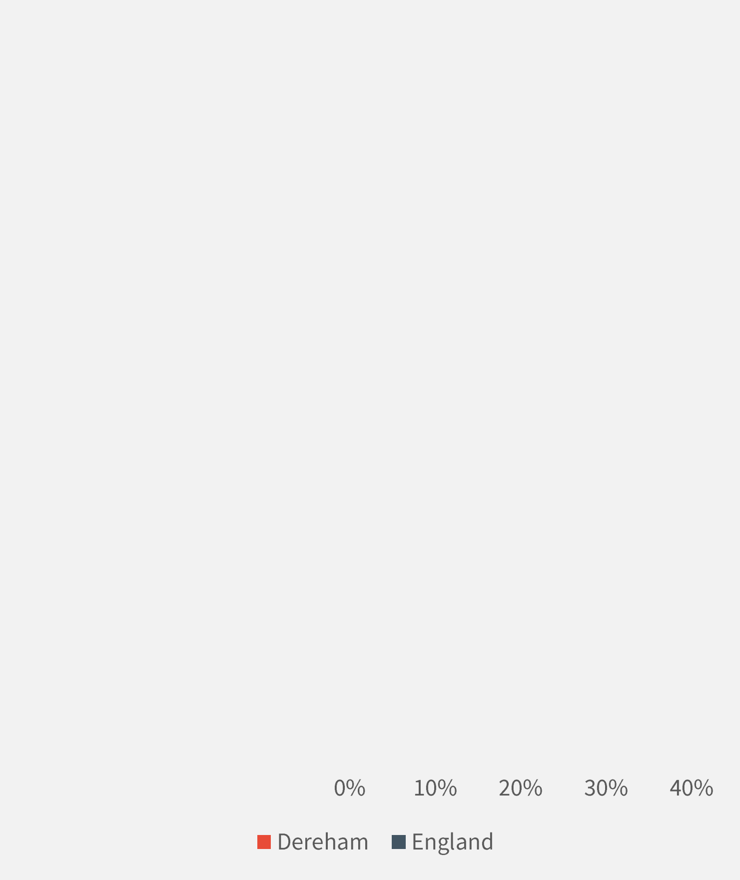
1

Dereham's jobs

Around 9,100 jobs are supported by employment in Dereham.

2





Dereham's economy:

- Dereham's business base has decreased by 3% since 2015.
- Some of Dereham's largest sectors by number of businesses include Retail (17% of total businesses), Financial and Professional Services (15%) and Public Administration, Education and Health (13%).
- There are around 9,100 jobs in Dereham, with jobs falling by 24% since 2015.
- Dereham's largest employment sectors are Public Administration, Education and Health (31% of total employment), Retail (17%) and Business Support Services (13%).
- Higher levels of businesses and employment within Retail than is seen nationally means that Dereham has likely been more exposed to the impacts of COVID-19 than other places.
- High levels of employment within Public Admin, Education and Health and Business Support Services in Dereham may enable the town to withstand some of the economic impacts of COVID-19 through increased demand for work within these sectors.

3

Source: IDBR, BRES, and UK Business Count. Analysis of Dereham's economy draws on the ONS Inter-Departmental Business Register to provide a more granular understanding of the local economy, whilst statistics for England draw on the Business Register and Employment Survey and UK Business Count data sources, also from the ONS.

Dereham's **major employers**

Using the Inter-Departmental Business Register, Dereham's top 10 largest businesses by number of employees have been mapped across the town.

The analysis has excluded businesses which have their registered address in Dereham, but do not have employees based on site. Typically, this includes recruitment agencies or cleaning businesses which are registered to a residential address.

This shows the importance of retail, public administration and manufacturing to the town's economy.

Top 10 largest employers

1. Tesco Stores Ltd
2. RFT Repairs Limited
3. Home Support Matters CIC
4. Breckland District Council
5. Zip Heaters (UK) Ltd
6. Norfolk County Council
7. Jeesal Akman Care Corporation
8. WM Morrison Supermarkets Plc
9. Flagship Housing Group Ltd
10. Enrich Learning Trust (Dereham Neatherd High School)

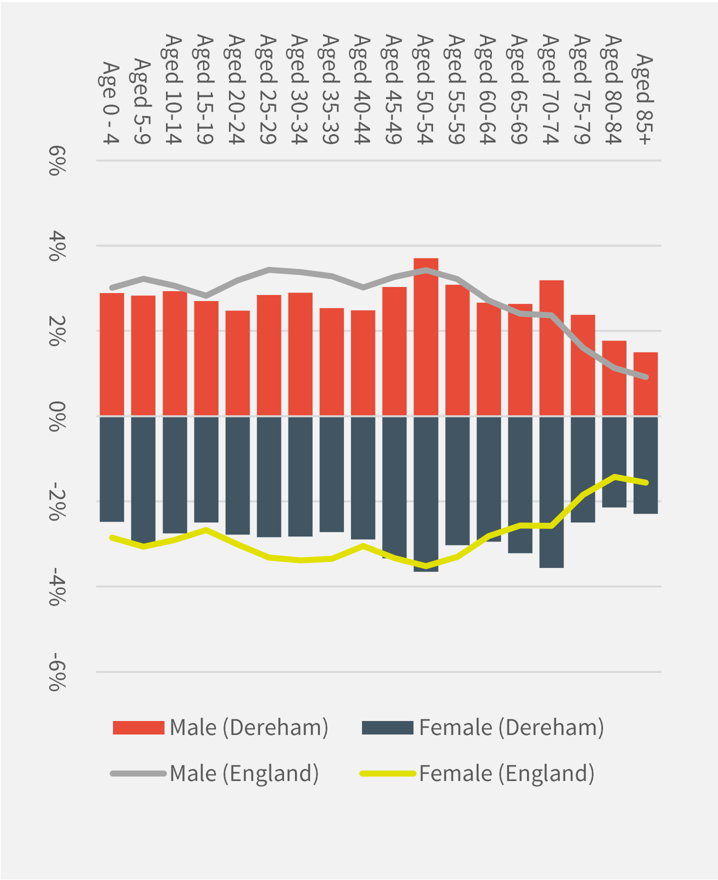
Source: IDBR

People: **labour market characteristics**

Dereham's demographics

Dereham has an ageing population with 25% of its residents aged 65 or over…

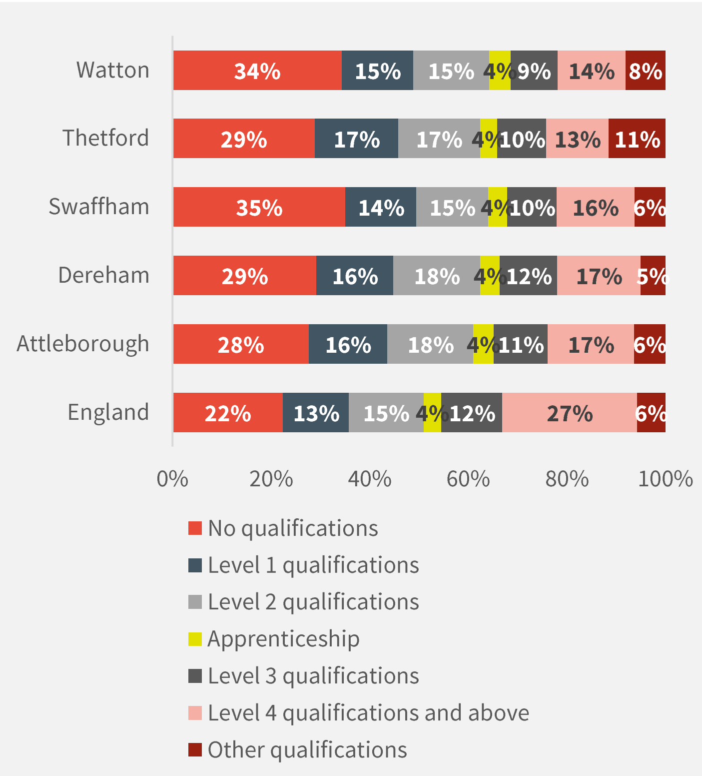
1



Dereham's skills + employment

Qualification levels are predominantly low and mid level, with only 17% holding level 4 in 2011

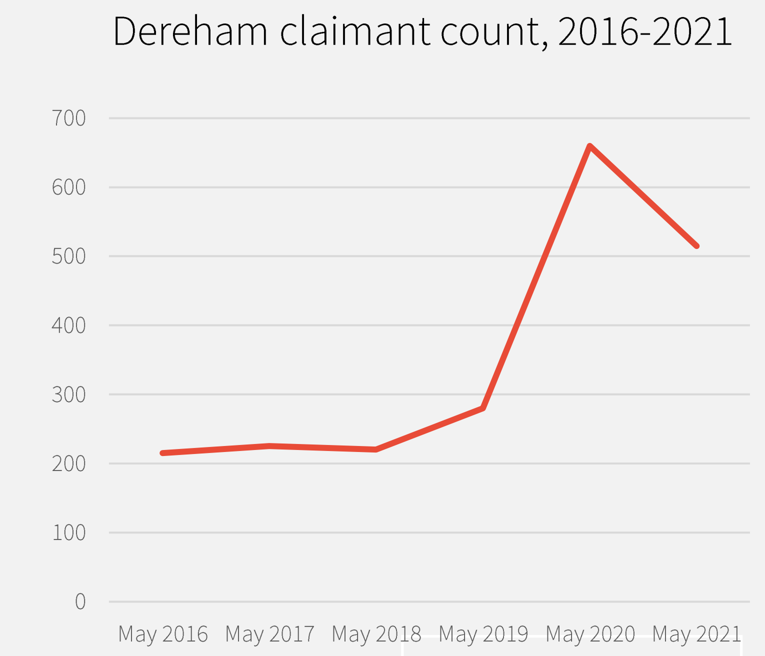
2



Note: 2011 Census provides latest picture of qualification levels across at a town-level. This data cannot be directly compared to other datasets such as the Annual Population Survey, as the 2011 Census profiles the entire population whilst other datasets focus on the population aged 16-64.

Dereham's people:

- Higher Education participation in Dereham is low. Only 26.6% of Dereham's young people go to university
- Dereham's claimant count rose significantly during the first few months of the pandemic. Rising by 135% in May 2020 compared to the same month in 2019.



Source: Population Estimates. ONS

Place: **Dereham's vitality**

Dereham's vitality

Dereham's deprivation challenges most acutely affect the town centre with further deprivation in the north of the town…

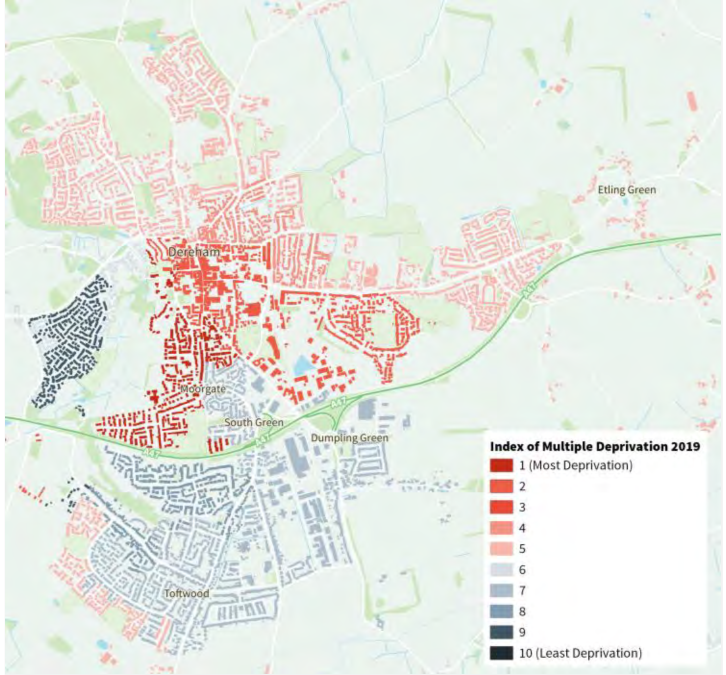
1

Dereham's infrastructure

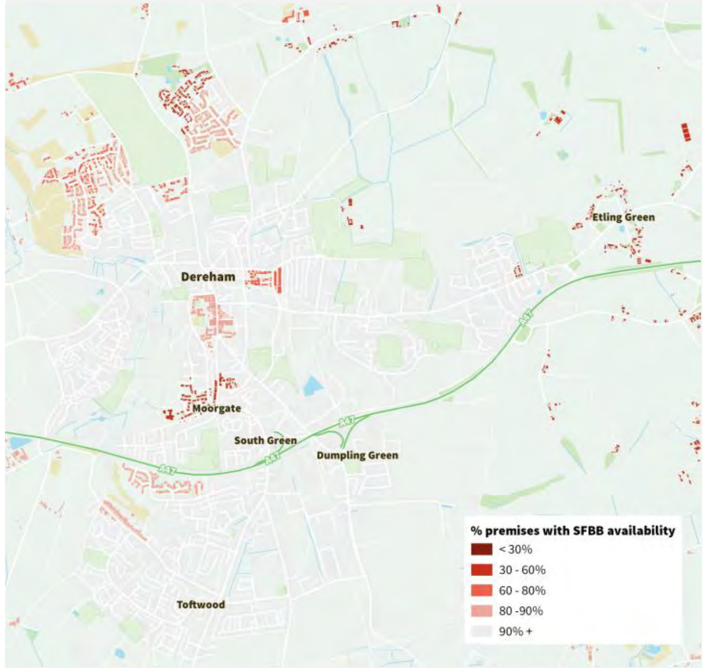
Digital connectivity is poor with only 0.5% of premises across the town having access to the fastest broadband speeds…

2

Index of Multiple Deprivation, 2019



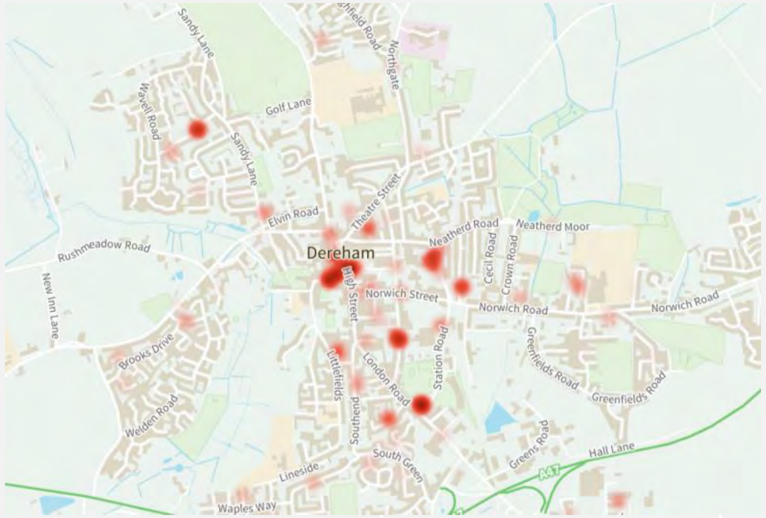
Superfast broadband connectivity, 2020



Dereham's place vitality:

- Retail vacancies in Dereham have grown significantly in recent months. Retail vacancy rates increased from 6.5% in 2020 to 10.1% in 2021. Despite this, persistent vacancies (premises that are empty for 3 years+) remain low. In 2021, only 2.2% of retail units were persistently vacant, meaning the town centre could be well-placed to bounce back from the effects of COVID-19
- Between February 2020 and January 2021, around 1,700 criminal offences within Dereham accounted for 17% of total incidents across Breckland and 25% of all criminal offences within the District's five market towns.

Dereham crime hotspots, 2020



Source: Ministry of Housing, Communities and Local Government; Ofcom.

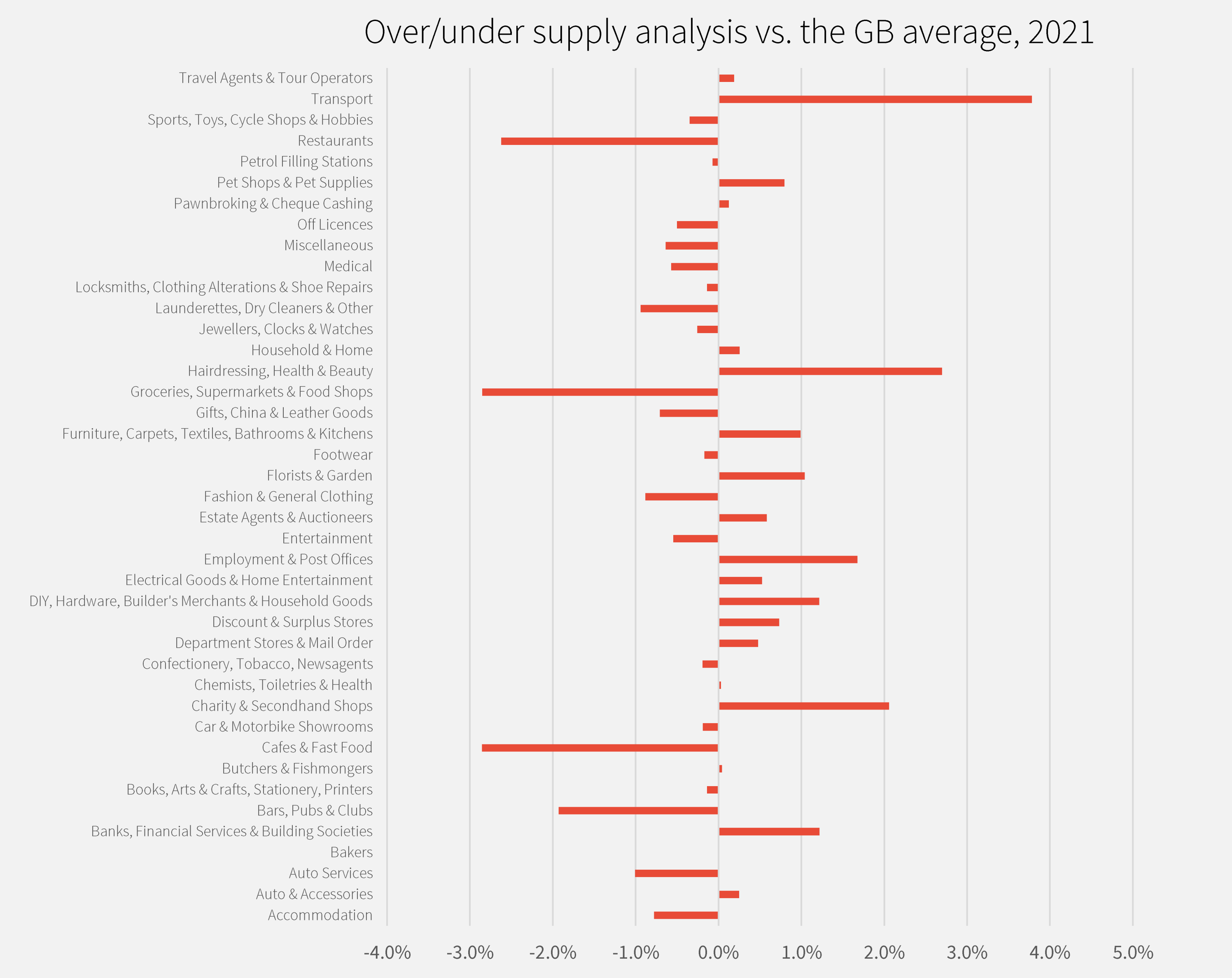
Dereham's **retail vitality (1): Supply**

Under supply of essential retail and food options which could undermine future place vitality...

The Local Data Company's supply data analyses the proportion of retail categories in a town versus the national average. This shows that relative to the national picture, Dereham has an oversupply of transport-related retail (such as taxi firms); Hairdressing, Health and Beauty; and Charity and Second Hand shops. Conversely, Dereham has an undersupply of Restaurants; Cafes and Fast Food; and Groceries, Supermarkets and Food Shops.

Undersupply typologies can broadly be categoried as leisure and essential retail uses. Due to restrictions imposed during the COVID-19 pandemic, essential retail has been significantly more resilient to closures. This undersupply could mean that Dereham's residents have had to travel further to access essential retail during the pandemic.

Similarly, whilst restaurants have been affected by COVID-19, as restrictions ease, many centres are exploring options such as al-fresco dining to encourage people back into town centres as part of a wider experiential offer.



Source: Local Data Company

Dereham's **retail vitality (2): Change**

Significant growth in Hairdressing, Health and Beauty shops matching national trends…

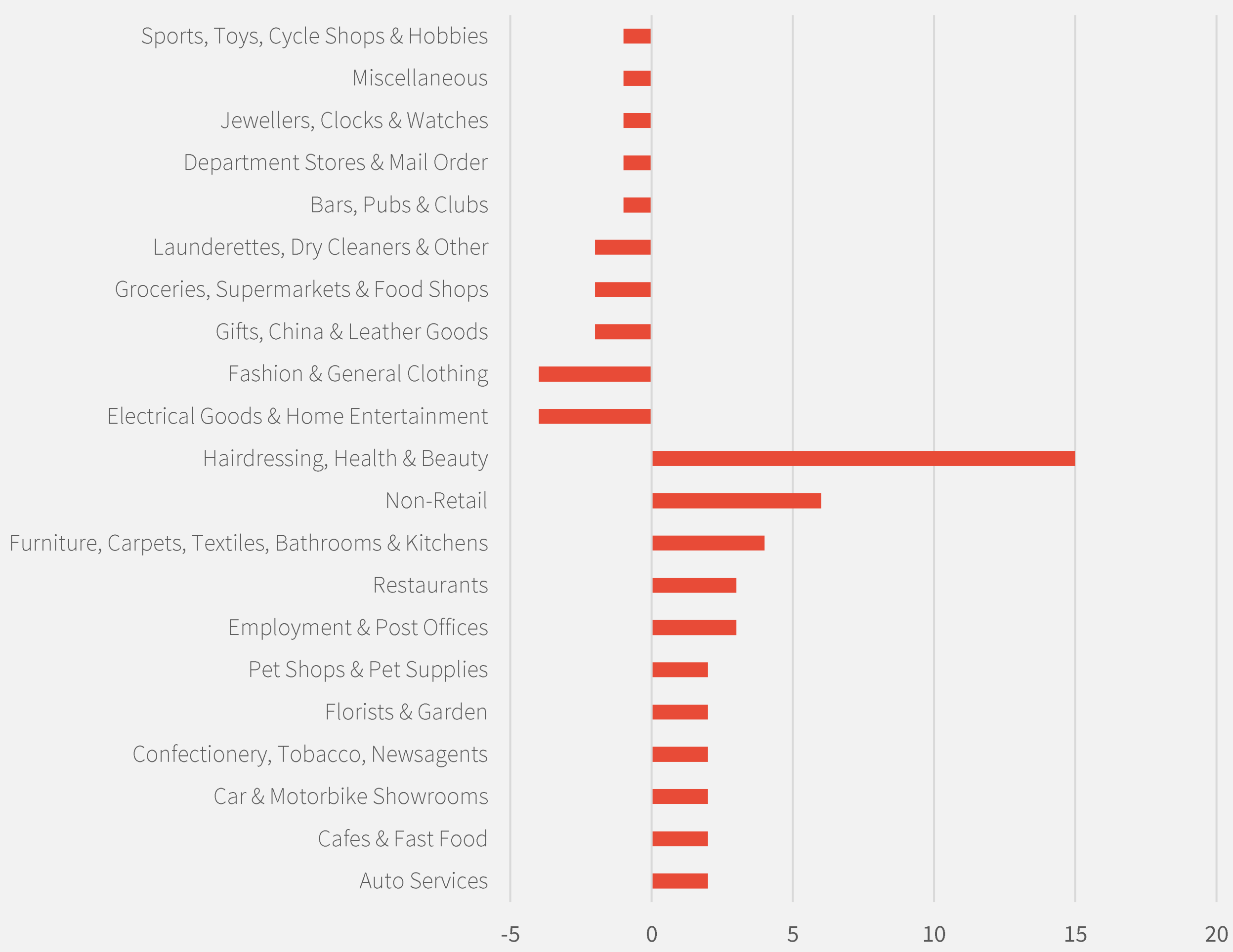
The chart on the right assesses net openings/closings by category of retail.

This shows that between 2014 and 2021, Dereham's largest net gains have been in Hair, Health and Beauty businesses (+15) and non-retail (+6). Non-retail businesses include professional service businesses typically found on high streets such as accountants and solicitor's offices.

The largest net closings have been in 'traditional' comparison retail. Comparison goods have a higher value and are purchased less often, such as household items, electrical goods, clothes and shoes. People tend to go to several shops to compare products before buying them. As a result, comparison retail is typically most exposed to the growth of online shopping.

Challenges relating to the growth of online shopping are present in Dereham. Largest net losses are in Electrical Goods and Entertainment (-4 stores) and Fashion and General Clothing (-4 stores).

Largest net increase/decrease by category, 2014/15-2020/21



Source: Local Data Company

Dereham's **commercial property**

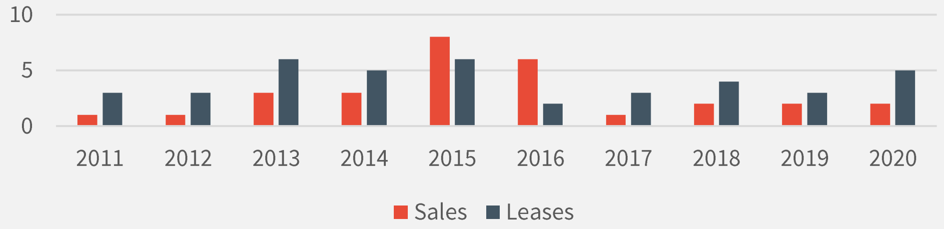
Dereham has the largest inventory of office space of any town in Breckland...

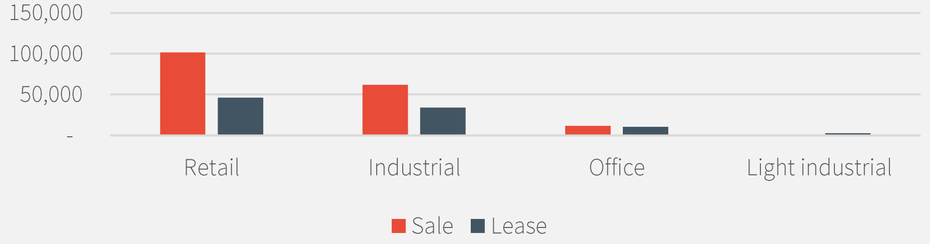
Dereham's commercial floorspace is predominantly office space with some retail and a small amount of industrial property.

Commercial floorspace take-up is primarily driven by demand for retail and industrial property, although the number of transactions within Dereham has been relatively low in recent years. However, vacancy rates across all categories is also very low, suggesting that Dereham hosts a significant number of long-term tenants and commercial property owners.

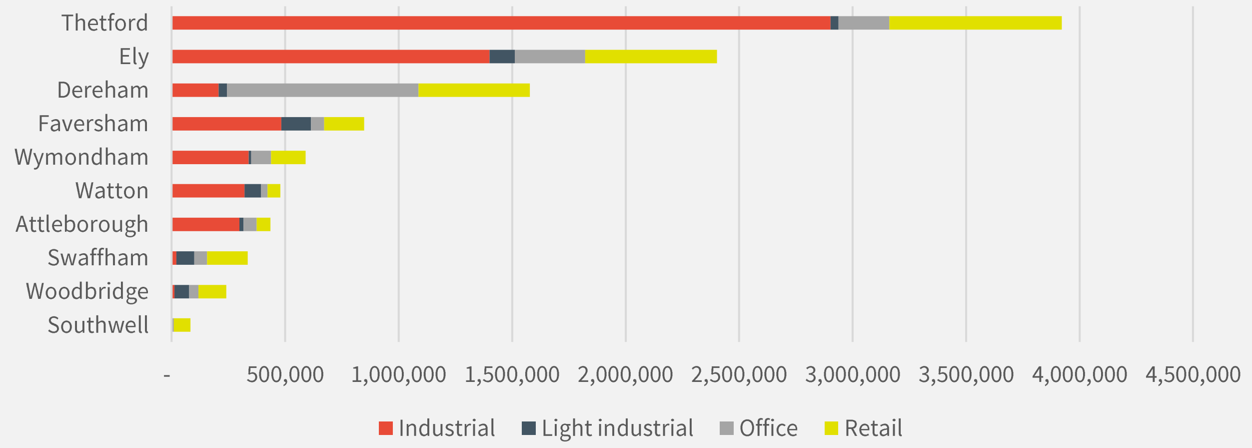
Retail and office rental values are relatively high in Dereham compared to comparator areas, despite all commercial floorspace being of Grade C quality. Growth in high value sectors to the town is likely to be significantly limited by the lack of high quality commercial property within the town.

Commercial transactions, 2011-2020

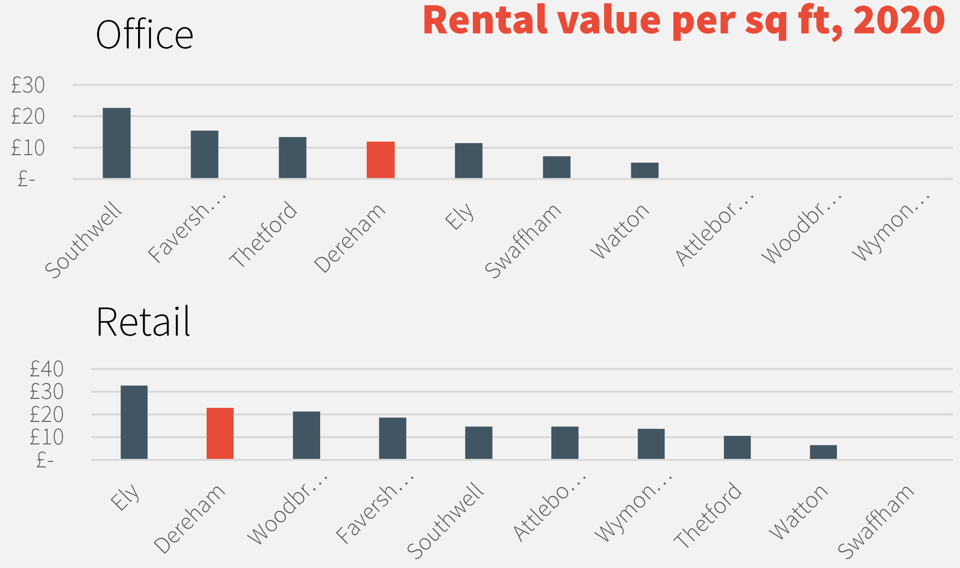




Commercial floorspace by town, 2020



Rental value per sq ft, 2020



Source: Costar

Dereham's **accessibility (1)**

Dereham's accessibility picture is mixed…

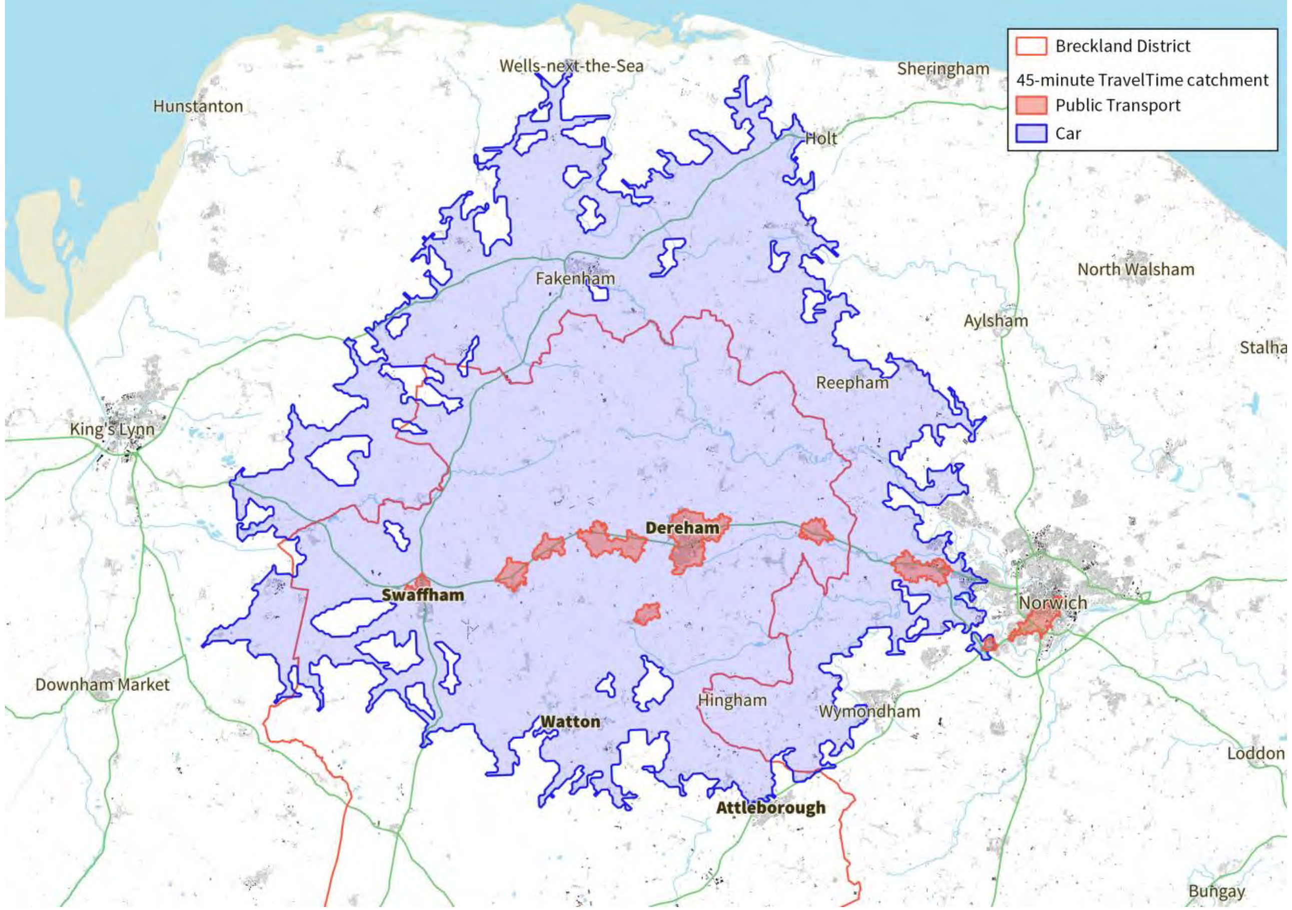
Almost a quarter of Breckland's residents can reach Dereham on public transport within 45 minutes, whilst six in every ten residents can reach Dereham by car in this same time.

Dereham's main public transport links stretch east-west between Swaffham and Norwich, with coaches to Norwich in 40 minutes.

The Dereham Railway Station and railway remains closed for passenger travel only hosting heritage services on the Mid-Norfolk railway.

Dereham has a large driving catchment stretching from Wells-next-the-Sea in north Norfolk to Attleborough in the South. This is underpinned by good road connectivity to neighbouring towns via the A47 towards Swaffham and the A1065 towards Fakenham and the Norfolk coast.

Dereham's 45-minute travel time catchments by car and public transport



Dereham's catchment population by mode of travel

45-minute catchment	Total catchment population	Proportion of Breckland's residents
Public Transport	70,000	23%
Car	159,000	62%

Source: iGeolise, ONS Mid Year Population Estimates

Dereham's **accessibility (2)**

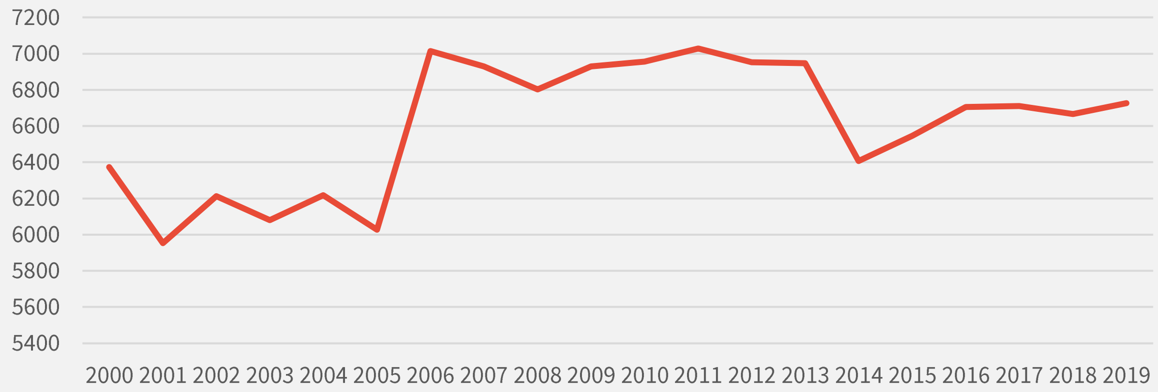
Increasing private vehicle usage and low levels of active travel…

A reliance on the car to access Dereham from surrounding areas is evidenced by increased car usage over the last twenty years. This is shown in the graph on the right which uses the Department for Transport's Traffic Count data which provides street-level data for every junction-to-junction link on the motorway and 'A' road network.

The graph shows that in 2019 the average number of vehicles using the Dereham exit of the A47 was 6,726 every day. Vehicle numbers have gradually increased since 2000, indicating that the town is becoming more congested.

Traffic counts within Dereham town centre reinforces a picture of car reliance and limited active transport uptake. Cowper Road which runs adjacent to Market Place and intersects with Norwich Street is heavily dominated by cars which accounted for almost 9 in every 10 vehicles in 2019. Conversely, pedal cycles accounted for only 0.4% of all journeys – potentially suggesting that more needs to be done to incentivise active travel alternatives.

Total vehicle count on the Dereham exit of the A47, 2000-2019



Annual average daily flow by mode – Cowper Road, 2019

Pedal cycle - 26 (0.4%)

Bus/coach - 23 (0.3%)

Motorbike - 65 (1.0%)

LGV - 500 (8.1%)

Cars/taxis – 5,506 (89.5%)

HGV - 54 (0.8%)

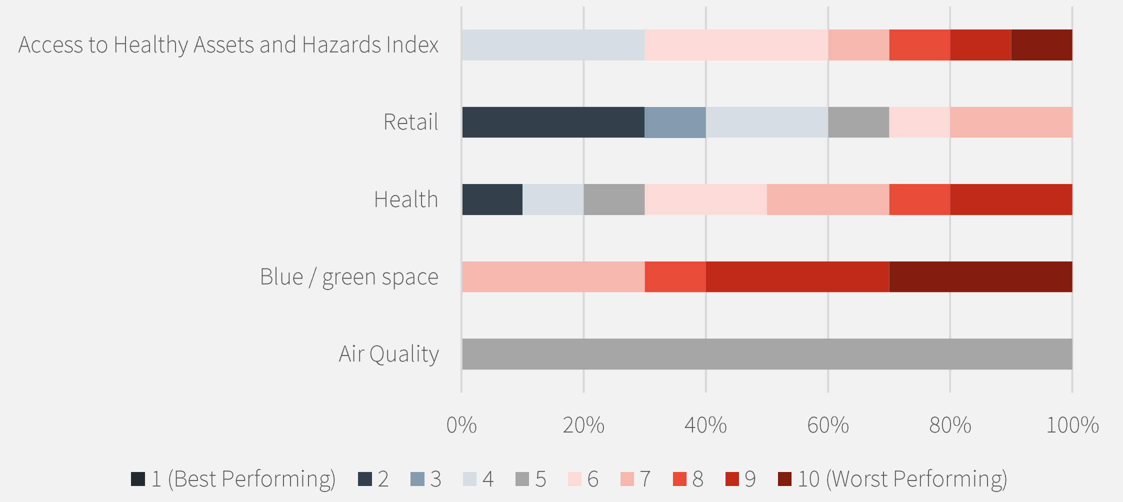
Source: DfT Traffic Counts

Social **infrastructure and healthy living**

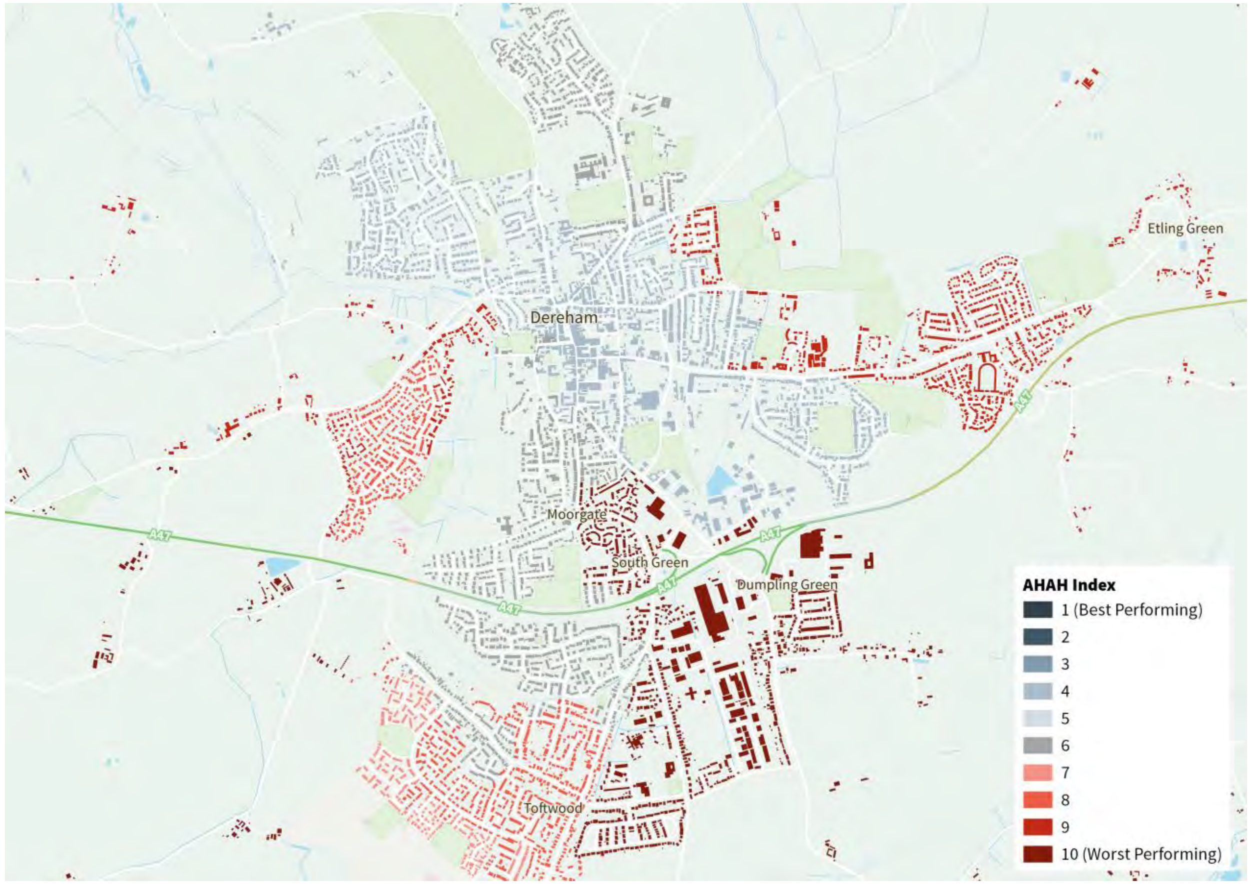
Access to the natural environment is the most prevalent challenge for Dereham's neighbourhoods, with access to healthy assets most acutely affecting the town's periphery…

Overall scoring of by the multi-dimensional AHAH index demonstrates poor performance most acutely affecting the town's periphery particularly to the south of the town centre. The majority of Dereham's neighbourhoods fall within the top 30% worst performing in terms of the access to the natural environment, including access to green spaces such as parks and recreational spaces, and blue space such as rivers, canals and lakes.

Access to Health Assets and Hazards Index in Dereham



Access to Health Assets and Hazards Index by neighbourhood



Source: Access to Healthy Assets and Hazards

Dereham: **Observational analysis**

Relevant policy & literature review

These documents, studies and records of consultation were reviewed as part of the appraisal process. They are summarised here but further analysis is extracted and reflected upon within maps throughout the document, informing an approach to understanding Dereham's public realm.

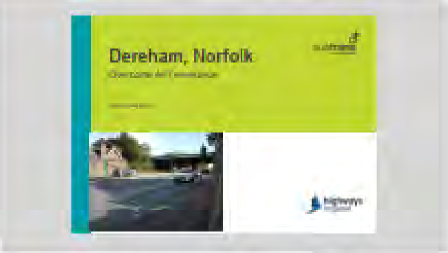
Together, the adjacent series of documents describe the policy context and ambitions for Dereham that will affect how the town can become better connected, greener, more socially, economically and culturally diverse and inclusive and in turn robust as a growing market town.

The policy and literature review will help to identify pipeline and proposed projects that will inform an intervention long list for the Delivery Plan.

↑ Dereham Neighbourhood Plan, June 2019
The Dereham Neighbourhood Plan sets out a number of policies that build on extensive engagement with local residents. As an overview, some of these policies include South East Dereham as an opportunity area for inclusive growth, specialist housing for older people, protecting employment land, strategies for diversifying uses in the town centre, sustainable transport, climate change, green infrastructure and celebrating Dereham's heritage.

↑ Dereham Town Centre Plan, December 2017
The Town Centre Plan forms the basis of some of the policies of the Neighbourhood Plan and highlights the strengths and weaknesses of the town centre and opportunities for its changing role in relation to future growth. Key topics in the document include retail floorspace needs, development opportunities such as Policy D6 allocation, and Wrights Walk Phase 2, parking issues, market place improvements and strategies supporting a 'town centre first' approach.

↑ Dereham Network Improvement Strategy, March 2019
The Dereham Network Improvement Strategy is an evidence base for the commissioned Future Scenario Testing Technical Note, Cycle Corridors Report and Town Centre Parking and Access Report. In summary, the strategy identifies key junctions that require improvements, key cycle corridors and associated improvements that would encourage active travel and a review of signage and wayfinding.



↑ Dereham, Norfolk: Overcome A47 severance, February 2020
The aim of the project is to create an 'access for all' corridor from the south west to North East of Dereham for pedestrians, families with pushchairs, disabled buggies and cyclists, to overcome the A47 severance. The ambition is that the route is traffic free and will link the residential areas in Toftwood to the employment areas, schools, 6th Form College and new open space park to the North East.

↑ Play Provision and Open Spaces Assessment, February 2021
This document assesses Dereham's network of play and open spaces and identifies that there is a deficit in the south whilst there is potential for enhancement of spaces in the north. The strategy advises on how these points should be addressed alongside providing recommendations for new development open space should meet both the quantity and quality requirements of the Local Plan.

↑ Dereham Town Plan Working Group (DTPWG) meetings and vision development
Key points extracted from the minutes of the DTPWG include: Dereham is in need of public realm improvements (more trees, benches etc), the town centre would benefit from improved dining offer and conveniences, an integrated approach to traffic management is needed and that greening, parks, open and play spaces should be looked at as part of the proposed growth strategy for Dereham.

↑ Suggestions for the Dereham Town Plan 2021, Dereham Heritage Trust
The Dereham Heritage Trust has set out a list of priorities in response to the Dereham Town Plan. These priorities revolve around a key concern that the town centre is being neglected due to the investment in the growth of the south of Dereham. In addition to this they think the market place needs attention, a new major traffic study is required, public toilets are needed, a heritage centre should be established, the Town Council offices should be moved and more green spaces should be prioritised as part of the growth strategy for Dereham.

↑ Statement of Significance St Nicholas' Dereham DAC, 2021
This document sets out the historic significance of St Nicholas' Church. The document details the proposal that is being developed for how the Nave of the church can become more of a community space. The proposal for this includes creating a key social space for the community alongside the provision of public toilets.

↑ Dereham LCWIP (Local cycling and walking infrastructure plans)
A draft scheme list and initial Network Planning for Cycling and Walking is currently being developed for public consultation on the proposed plan. Project and strategies suggested include traffic calming measures, contra-flow, advanced stop signs, early starts and signage.

Other transport related studies for Dereham:
- Norfolk Rail Prospectus 2020; includes plans for new passenger services from Wymondham to Dereham
- Cycling Assessment 2019
- Bus re-routing feasaiblity study
- NCC pedestrianisation options for Market Place

1.1
CURRENT POLICY & DEVELOPMENT

Potential projects: pipeline & suggested projects

Town centre regeneration

1.1 Major re-development of Nelson's Place, Cowpers Road Car Park and surrounding shops
1.2 Introduce a community toilet scheme
1.3 Celebrate the character and enhance the street scene of Norwich Street
- public realm improvements should be made so this route is more pedestrian & cycle friendly
- two-way cycle route proposed

1.4 Improved appearance
1.5 Major re-design and re-configuration of the marketplace and town centre
- to create a more pleasant environment and focal point
- parking reduced
- bus route reconfigured

1.6 Pocket public spaces located off key connecting routes into the town centre could be enhanced
- e.g. Nelsons place square, community garden, Aldiss Court

1.7 Community infrastructure should be more present in the public realm

Physical and digital infrastructure

2.1 Delivery of enhanced active travel infrastructure around the town and into the centre
- through the delivery of commitments set out in the Local Cycling & Walking Infrastructure Plan
- 'Welcome back funds' such as LSF & RHSS used to implement cycle infrastructure

2.2 Conversion of the inactive northern sections of the Mid-Norfolk Railway into a greenway for cycling, walking and leisure
2.3 Re-connection of the Mid-Norfolk Railway to the commercial network
- or extend and re-connect with the heritage rail extending into Sheringham

2.4 Build a new bus station and interchange on Cowpers Road car park
2.5 South West to North East segregated 'active travel' route
- linking the residential areas in Toftwood to the employment areas, schools, 6th Form College and new open space park to the North East

2.6 Re-directing bus routes so they travel along Quebec street rather than the market place
2.7 Improve wayfinding and signage
- signs and wayfinding that celebrate local histories have been recently commissioned

2.8 Road and safety improvements
- Draytonhall Lane which is currently a casualty "hotspot"
- B1135 roundabout to address congestion
- more crossings on Wellington Road (a key school route with nowhere safe to cross)

2.9 Town centre free WiFi

Business and enterprise

3.1 Activation of the major employment site between the council offices and A11
- through the delivery of high quality light industrial and industrial space

3.2 Refurbishment of the Breckland Business Centre
- to provide higher quality flexible and/or affordable workspace

3.3 Development of the council's industrial units on Bertie Ward Way
- to provide higher quality light industrial and industrial space for higher value sectors

3.4 Long-term redevelopment of Robertson Barracks into a new business park

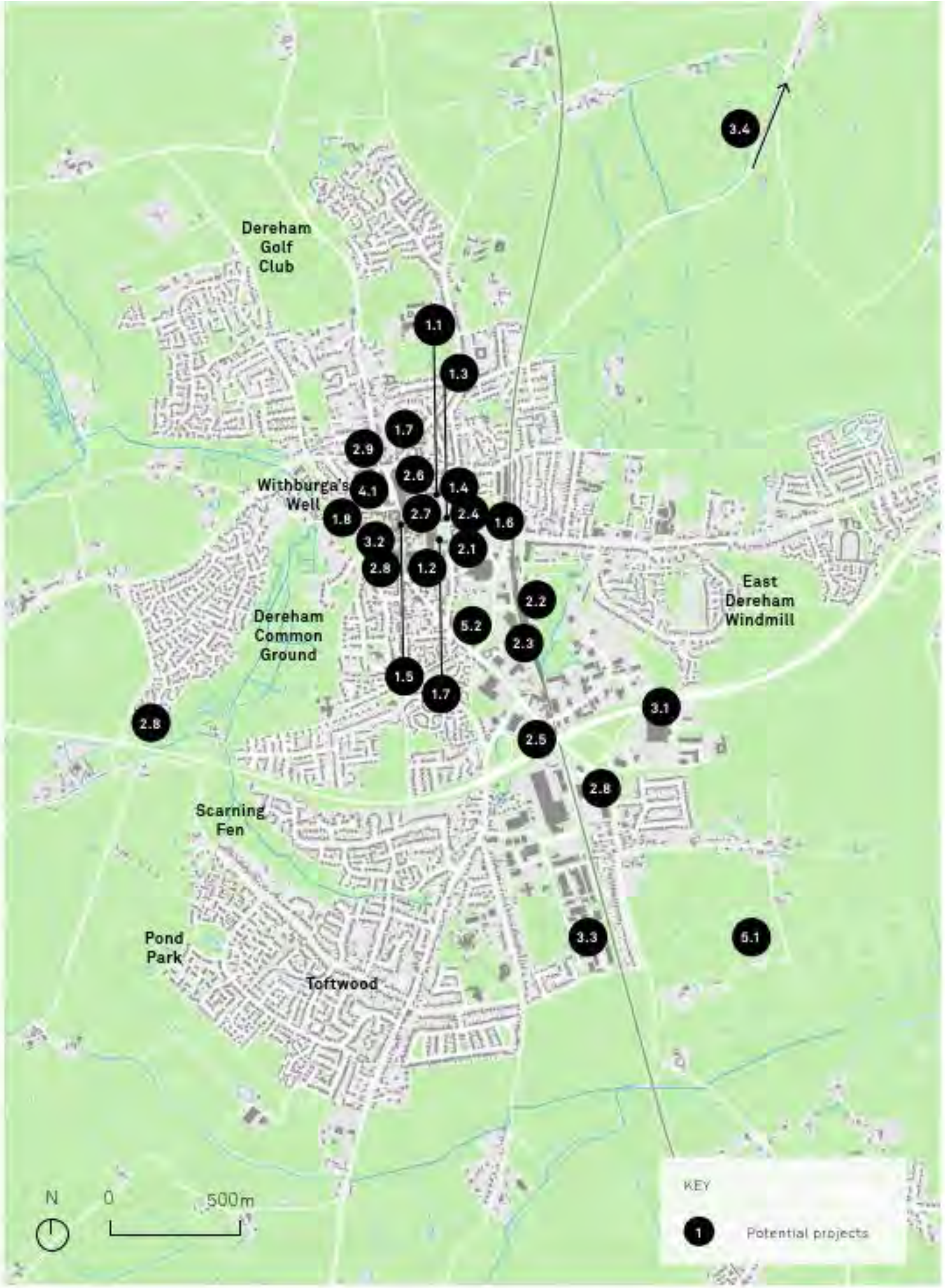
Culture and heritage

4.1 New Heritage and Archive centre for Dereham in the existing Town Council Offices or close to the church entrance

Environment and sustainability

5.1 Purchase and activate new open green space and sports pitches on the edge of the town
- deficit in the south of Dereham
- north of Dereham spaces have potential for enhancement

5.2 Enhance green spaces in and around the town centre
- Garden on St Withburga Lane underused & Fleece Meadow



1.2

LOCAL ASSETS, HERITAGE & USES

Denominations of open space

The adjacent map shows that the nature of publicly accessible green space in Dereham is predominantly playing fields and sports provision. Most of these spaces incorporate open access play areas which are fairly evenly distributed across the town. It is notable that there is also a surplus of large community allotments and growing spaces.

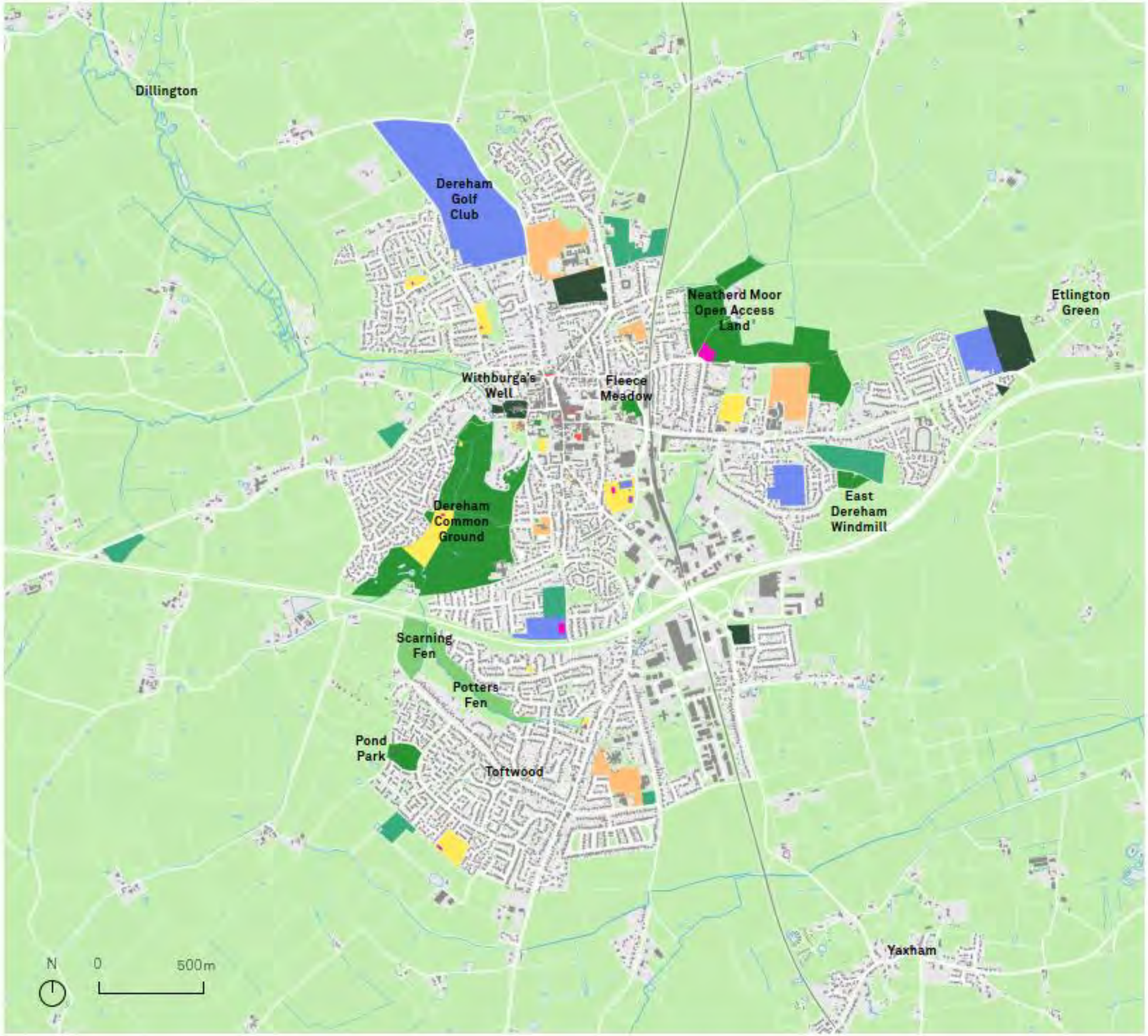
However, public parks are limited and seem to have unclear identities in Dereham. The small public parks/gardens that are located in the town centre such as Fleece Meadow and the garden adjacent to St Nicholas' Parish Church are not visible in the public realm, badly signposted and therefore underused. Due to their location and charming character, they have the potential to become lively public places which will in turn deter any anti-social behaviour that is common place in this scale of park.

In the town centre, there are a series of 'pocket public spaces' that could also be better celebrated. They have potential to become a 'network' of sociable destinations due to their locations along key connecting routes.

The Wendling Beck Exemplar Partnership (WBEP) is a large scale restoration project proposed for the edge of Dereham, near Gressnehall, which could link with proposed LCWIP cycling and walking improvements.

KEY

- Public park
- Nature reserve / wildlife site
- Allotments / community growing space
- Religious grounds / cemetery
- Playing fields / recreation grounds
- Sports provision (football pitches, golf courses, basketball & tennis courts)
- School grounds
- Open access play area
- 'Pocket' public spaces in town centre



1.2 LOCAL ASSETS, HERITAGE & USES

Cultural, heritage & leisure infrastructure

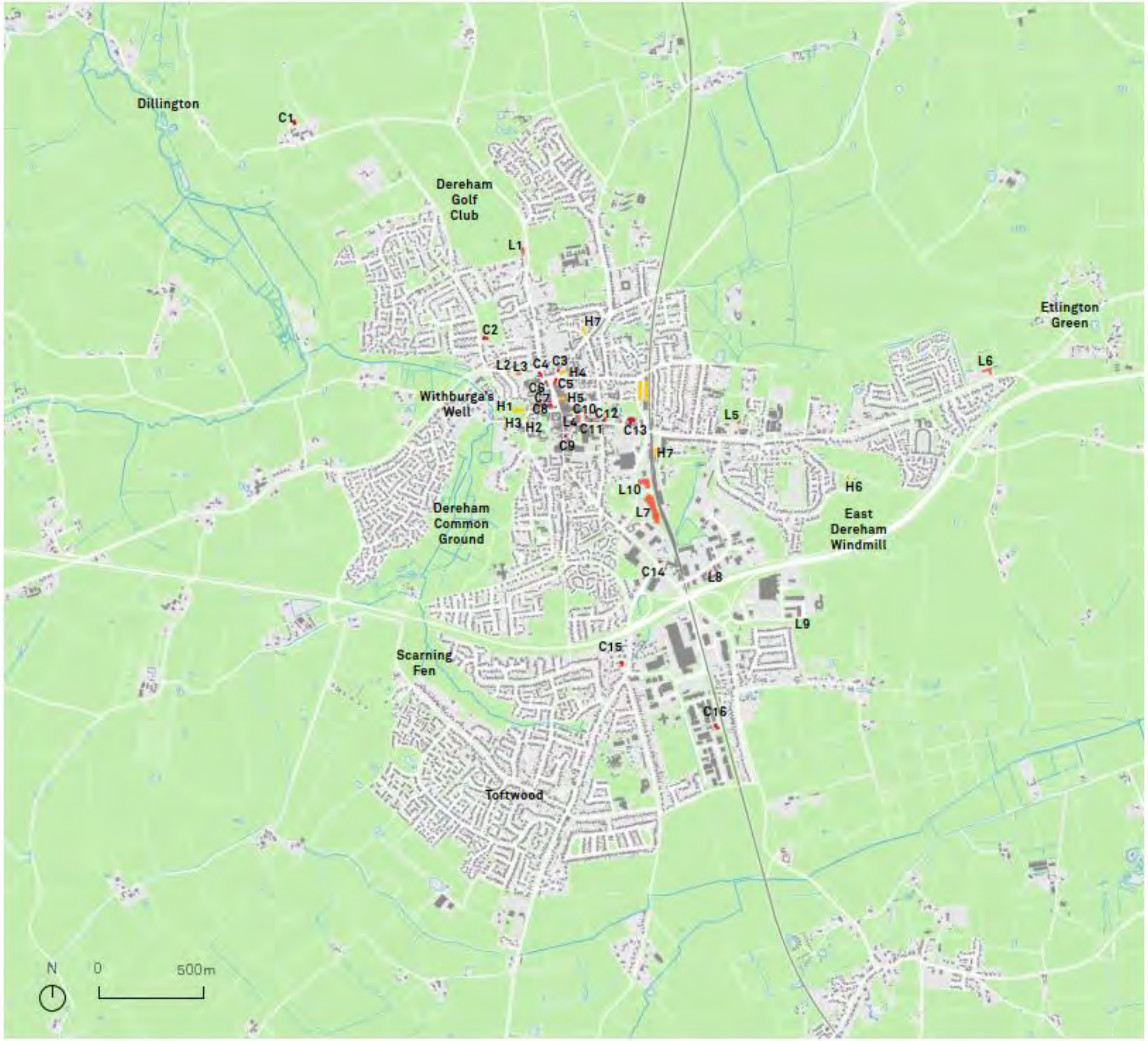
The adjacent map highlights that cultural, heritage and leisure infrastructure is predominantly located within the town centre. These spaces could contribute to an active public realm, through hosting more regular events for example, strengthening the pull of the town centre and its importance as an anchor as development intensifies in the south. The Blues Festival is a key annual event that the town celebrates - there is interest in developing the town's events programme to further celebrate the culture of Dereham.

KEY

Culture
C1 Collectair Limited Edition Art Gallery
C2 Gemini Pub (Blues Festival location)
C3 The Cherry Tree Pub (Blues Festival location)
C4 The George Pub (Blues Festival location)
C5 The Old Eagle Pub (Blues Festival location)
C6 DC's Bar (Blues Festival location)
C7 The Metro (Blues Festival location)
C8 Orion Cinema (Blues Festival Location)
C9 The Bull Pub (Blues Festival location)
C10 Norski Noo's Gallery
C11 The Cock Pub (Blues Festival location)
C12 The Kings Head Pub (Blues Festival location)
C13 Dereham Memorial Hall (Blues Festival location) + At the Gallery Dereham
C14 The Railway Tavern Pub
C15 Busybodies Stage School & Norfolk Institute of Performing Arts
C16 Dance With Me Academy

Heritage
H1 St Nicholas' Church and St Withburga's Well
H2 Bishop Bonner's Cottage
H3 The Bell Tower
H4 Former home of John and Ellenor Fenn
H5 Cowper Memorial Church
H6 East Dereham Windmill
H7 Dereham Mid-Norfolk Railway (Blues Festival location)
H8 Trinity Methodist Church
H9 Maltings Buildings

Health & leisure
L1 Dereham Golf Club
L2 Lloyds Total Fitness
L3 Big Andy's Gym
L4 NR Health & Fitness Dereham
L5 Dereham Cricket Club
L6 Dereham Town Football Club
L7 Dereham Leisure Centre
L8 Salter's Family Karate
L9 Barretts Health & Fitness
L10 Strikes Bowl



1.2

LOCAL ASSETS, HERITAGE & USES

Council owned assets

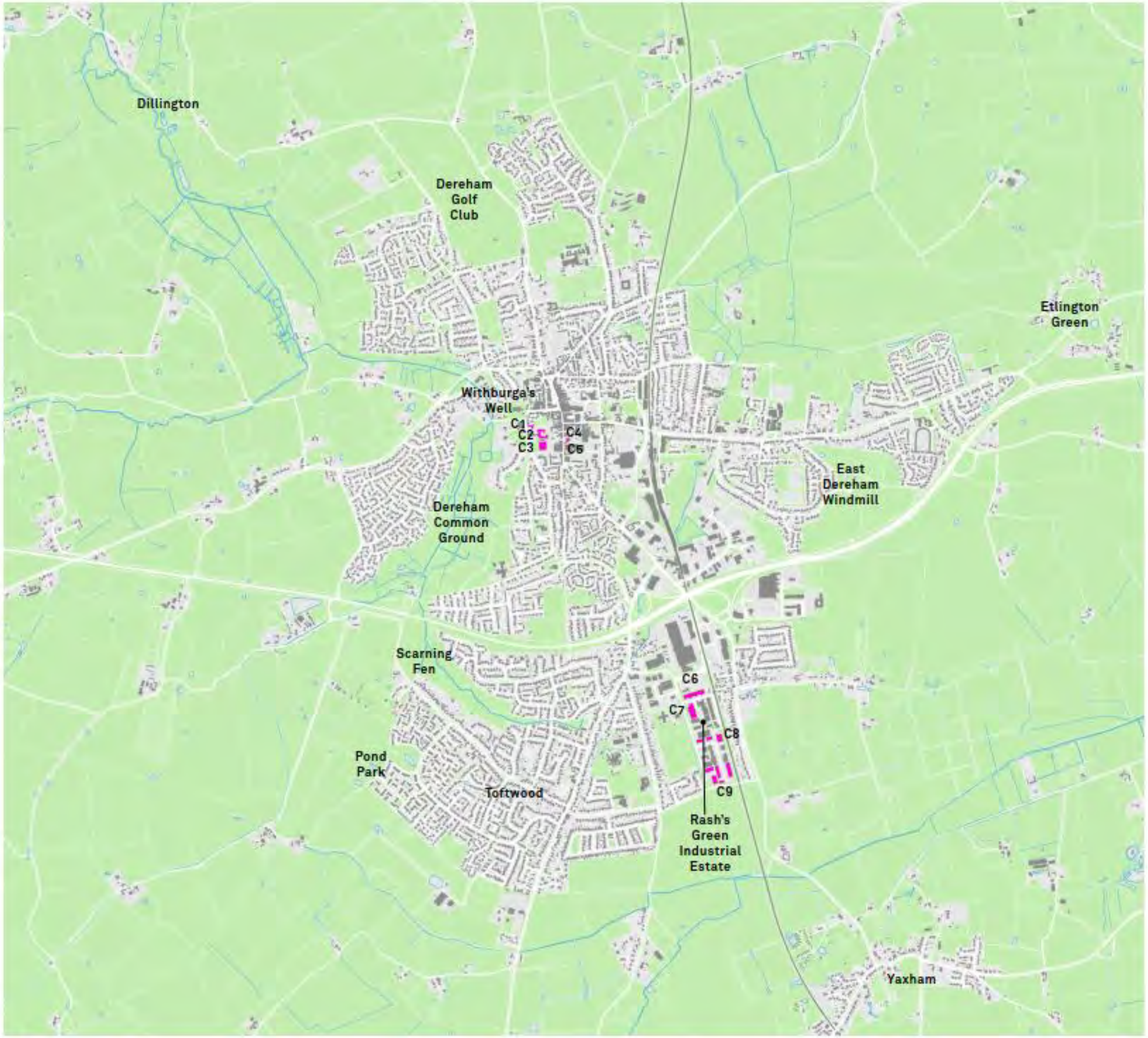
The adjacent map shows that there are two clusters of council owned assets, in the town centre, and in the industrial area in the south of Dereham, outside of the town centre.

The industrial estate units currently predominantly house motor and vehicle businesses, as well as manufacturers. These spaces could contribute to a wider skills and educational offer, through partnerships with the businesses using the space.

In the town centre, council owned assets include Breckland Business Centre, The Jubilee Suite within the Guildhall, and the St Nicholas Bowling Club which could all be used to host more regular cultural or community events.

KEY

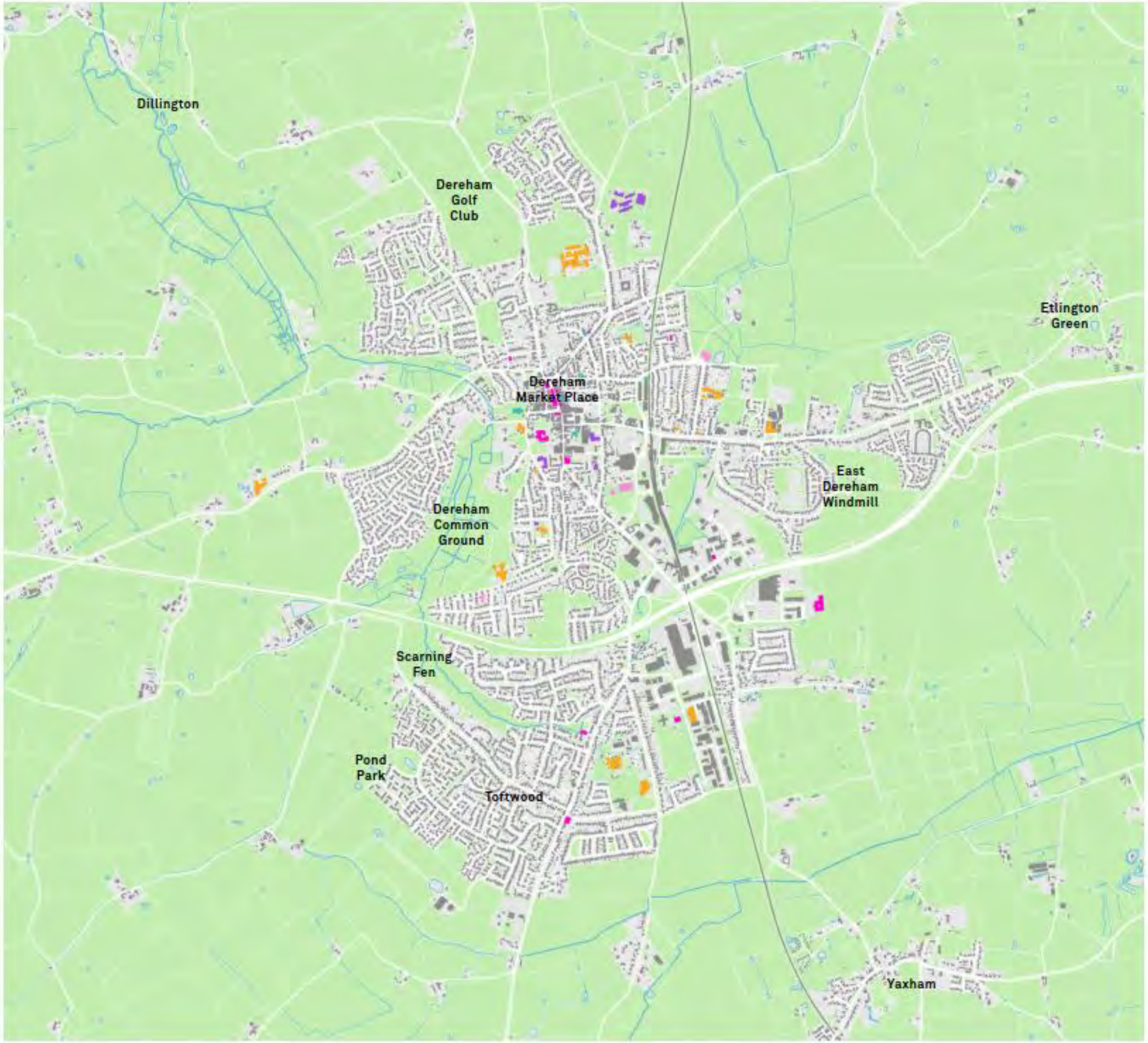
Council owned assets
C1 The Jubilee Suite, The Guildhall, St Withburga Lane
C2 Breckland Business Centre
C3 St Nicholas Bowling Club, St Withburga Lane
C4 Bond House, High Street
C5 31 High Street
C6 1-7 Charles Wood Road, Rash's Green Industrial Estate
C7 9 Rash's Green, Rash's Green Industrial Estate
C8 1-11B Bertie Ward Way, Rash's Green Industrial Estate
C9 12-31 Bertie Ward Way, Rash's Green Industrial Estate



1.2 LOCAL ASSETS, HERITAGE & USES

Social and community infrastructure

Dereham Town Centre has a strong offer, with community and social infrastructure clustered around the historic heart of the town centre. Important civic and anchor institutions such as Dereham Town Council, Dereham Library and Breckland District Council offices are also present. A number of banks are still open which is a key strength. Schools, colleges and family play areas are dotted around the residential edges of Dereham along with GP services.



KEY

- Community spaces
- Education institutions
- Religious spaces
- Medical services
- Family play areas

1.3

TRANSPORT & MOVEMENT

Public transport & active travel

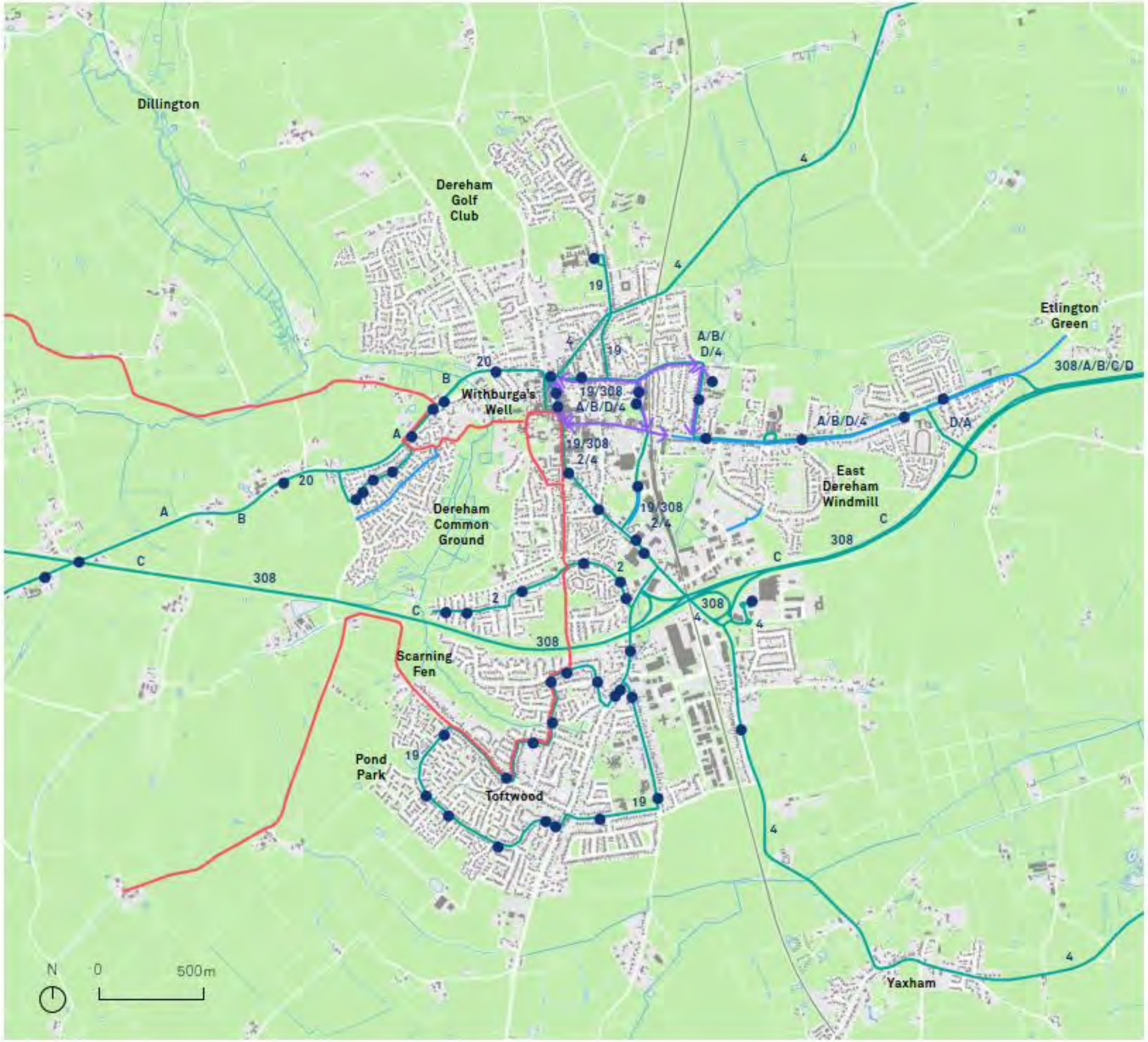
This map highlights that in a number of locations, the busy bus routes that are host to many different and often clashing bus timetables, impacts on cycle movement.

Coordination of bus timetables is required to alleviate congestion in the town centre, especially around the market place, while ensuring that cycleways and safe cycle movement are not affected by unnecessary heavy traffic that currently dominates the width of the carriageway.

The adjacent map also shows the 'cycle corridor route 2' that is outlined in the Dereham Network Improvement Strategy 2019 and includes cycle corridor additions that should be taken forward for further assessment. The cycle corridor works/improvements that are coming forward and that have since been set out as part Dereham LCWIP Scheme List, include strategies such as traffic calming measures, contra-flow, advanced stop signs, early starts and signage.

However, as shown on the map, this cycle corridor clashes with bus routes A, B, D and 4 which means appropriate measures will have to be taken to ensure bus movement does not impact on cycle paths.

A consolidated walking and cycling strategy for Dereham is due to go to consultation in June 2021.



KEY

- Bus routes (market place: buses A, D, 4, 19, 20)
- Bus stops
- Existing National Cycle Route 13
- Existing shared footway & cycleway
- Proposed cycle corridor additions (Option 2, Dereham Network Improvement Strategy 2019)

1.3
TRANSPORT & MOVEMENT

Perceptive study of the public realm

Town centre regeneration

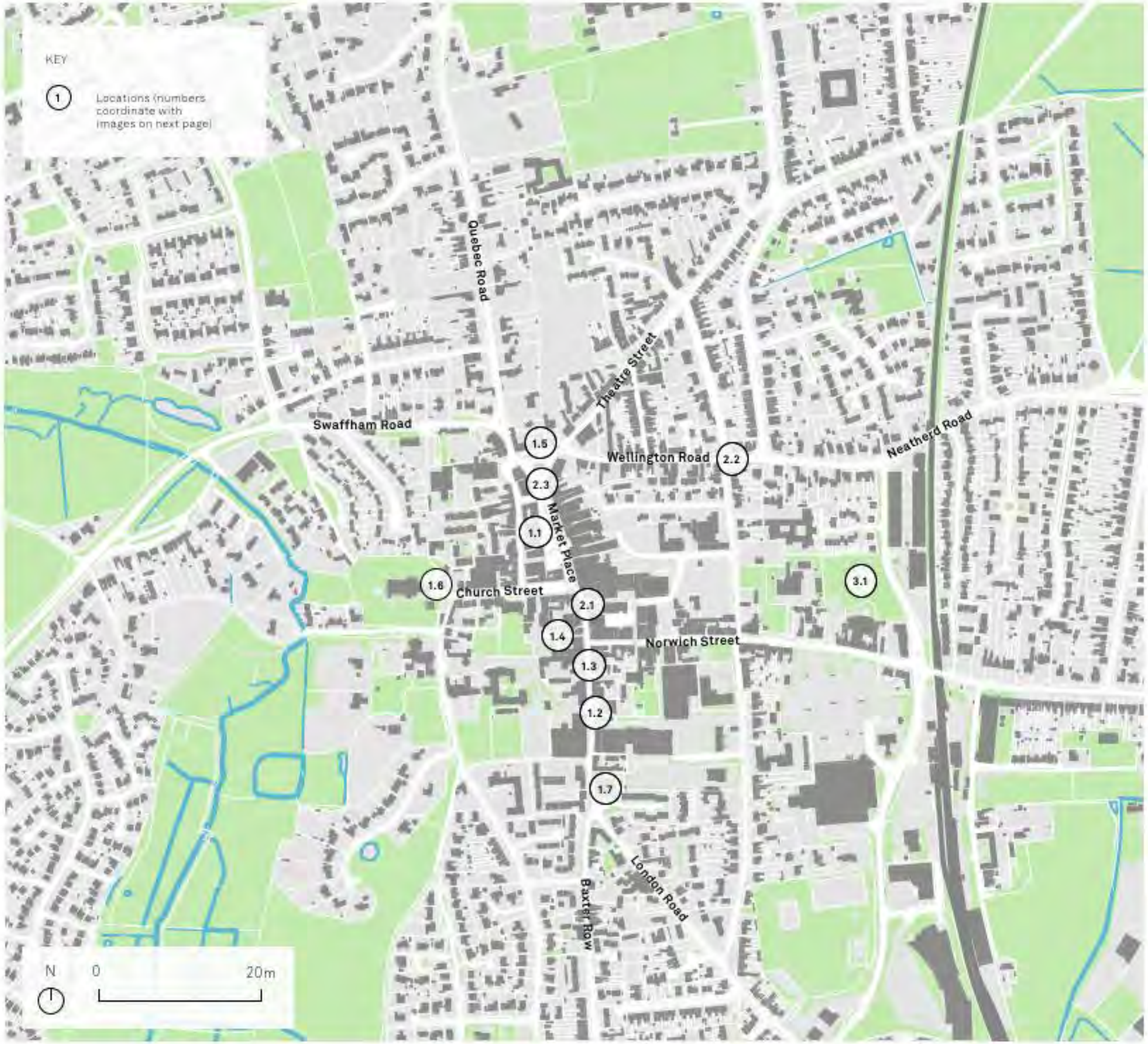
1.1 Unnecessary surplus space for parking and traffic that could be reduced to allow for more civic space in the market place
1.2 The public realm can be generous in some locations, allowing for spill out space and a sociable public realm - improvements to the quality of the public realm would further enhance this
1.3 The town centre would benefit from public realm improvements - restricted pavement widths, cluttered walkways and ineffective drainage solutions impact on pedestrian movement
1.4 There are a number of 'pocket' civic spaces along connecting routes in the town centre that could be enhanced to become key social spaces in the town (refer to the 'denominations of open space' map for other locations)
1.5 'Leftover' and inactive civic space that could be enhanced to extend the activity of the market place across the street
1.6 Historic walls/public seating and tree benches could be extended throughout the town centre to emphasise the distinct identity of the public realm
1.7 Key community infrastructure is either badly signposted or not fully visible in the public realm and therefore does not feel present in the town centre

Physical and digital infrastructure

2.1 Wide one-way roads into the market place compromises the width of pedestrian walkways whilst creating a traffic-dominated town centre
2.2 No crossings along Wellington Road, despite it being a key school route
2.3 Badly located crossings affect traffic flow around the market place that in turn impacts on pedestrian and cycle movement

Environment and sustainability

3.1 Limited public parks in the town centre could be better celebrated/signposted to become more present in the public realm and active (refer to the 'denominations of open space' map for other locations)



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2.2

Town Deep-Dive: Attleborough

Attleborough's economic **history**

A11 as the catalyst for the town's growth and evolution

Like most of Norfolk's market towns, Attleborough's marketplace was the focal point for traffic along the main Thetford Road. The modern A11 was the catalyst for growth in the town which has brought both benefits and challenges through the centuries. In 1695, a turnpike was established between Attleborough and Wymondham to cover the costs of repair. Although the A11 is vital for the town's prosperity and connectivity – challenges of north-south congestion persist.

Business clustering around the railway station

Levering the town's rural and agricultural heritage, Attleborough's economy was defined by major food and drink businesses which clustered around the train station during the 20th Century. Cider makers Gaymers were located in the town for most of the 1900s before withdrawing from Attleborough in 1980. Other notable station-based businesses include Coller & Sons (corn, coal, cake and seed merchants) and the Anglo-American Oil Company

New housing estates to support the town's growth

Whilst change and the growth of the town remained mainly stagnant during the 1950s, the 1970s brought significant changes to the town's population and urban fabric.

The first estate programme began with the building of the council-owned Cyprus Estate which has since been complemented by other private housing schemes such as Fairfields and Ollands built mainly in the 1970s and a large estate on the south side of the town in the 1990s.

Urban extension to transform the town

In March 2019, Breckland District Council voted unanimously to approve the Attleborough Sustainable Urban Extension project. The project will see the town grow significantly, including:

- A strategic link road designed to reduce traffic in the town centre
- Two x 2 Form Entry Primary Schools (with land safeguarded for future expansion to 3 Forms of Entry) and contributions to Secondary Education
- A new Local Centre with 4,000 sqm of space for shops, cafes, a pub and small offices - all providing local employment opportunities
- Two smaller Neighbourhood Centres with shops and community facilities
- A 2,100 sq m Community Centre
- Around 90 ha of publicly accessible recreational open space

Source: Exploring the Norfolk Market Town, Attleborough Town Council

Local **policy review**

Over the planning period, Attleborough is expected to accommodate at least:

2,680 new homes

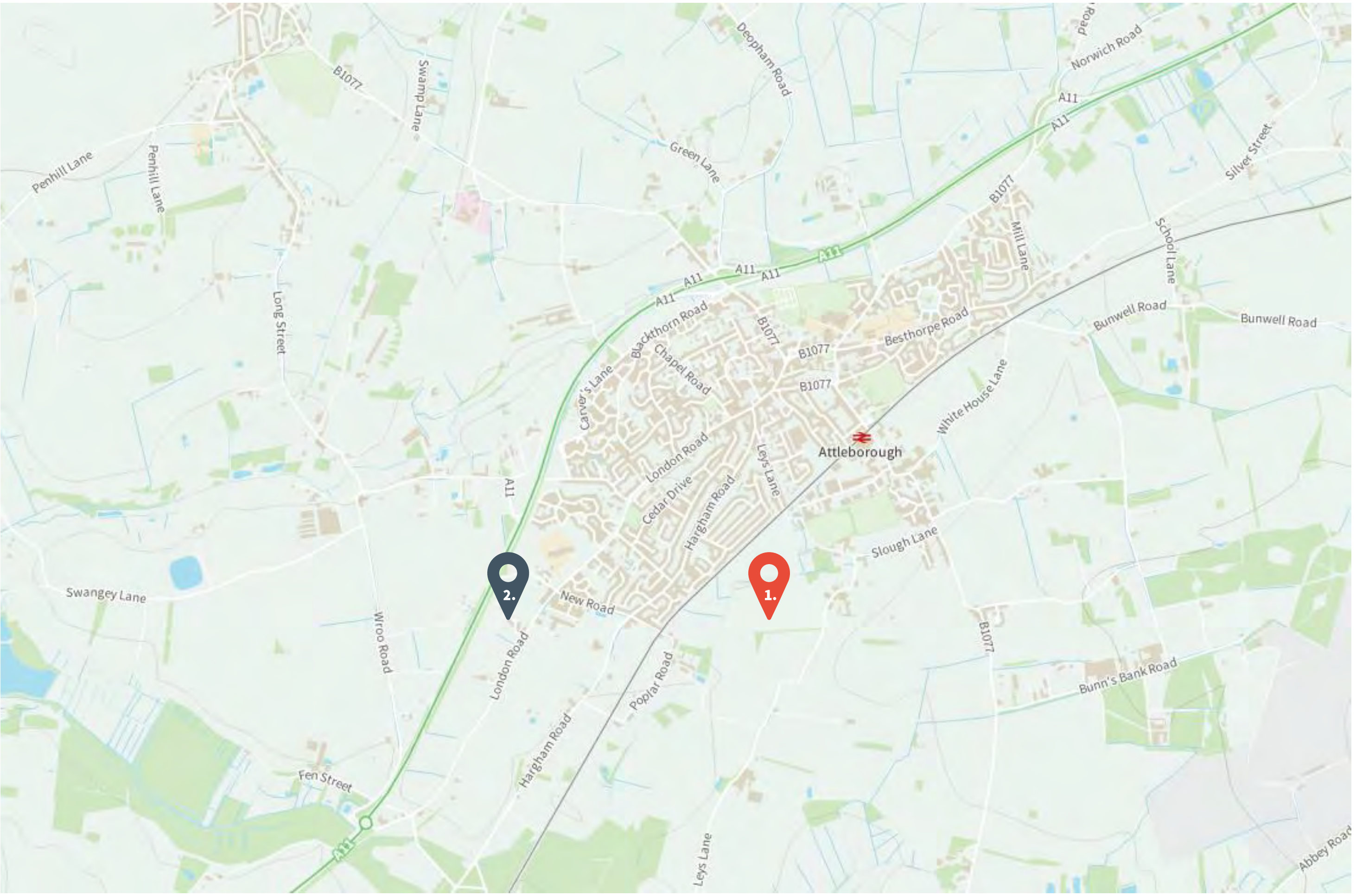
10 hectares of new employment land

To deliver this, key sites include:

1. **Attleborough Strategic Urban Extension:** Land to the southwest of Attleborough amounting to approximately 217ha allocated for a Strategic Urban Extension
   - At least 2,680 net new dwellings (1,320 dwellings anticipated beyond the plan period)
   - A strategic link road designed to reduce traffic in the town centre
   - Two x 2 Form Entry Primary Schools (with land safeguarded for future expansion to 3 Forms of Entry) and contributions to Secondary Education
   - A new Local Centre with 4,000 sqm of space for shops, cafes, a pub and small offices - all providing local employment opportunities
   - Two smaller Neighbourhood Centres with shops and community facilities
   - A 2,100 sq m Community Centre
   - Around 90 ha of publicly accessible recreational open space

2. **Land to the west of London Road:** at least 10 hectares for office employment uses

Attleborough's key development sites and Local Plan allocations



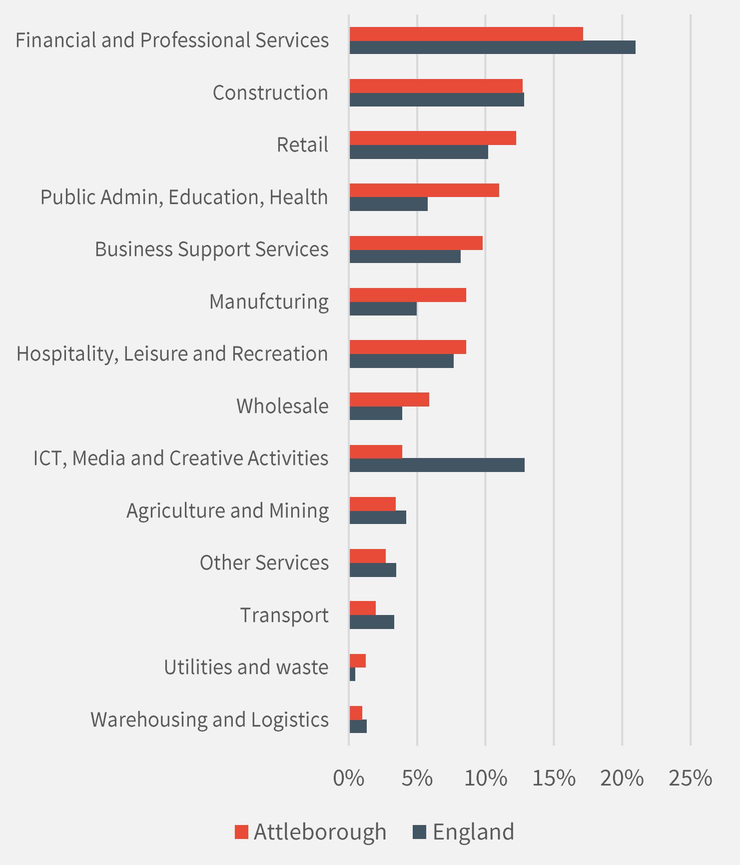
Source: Breckland Local Plan

Economic **Function**

Attleborough's businesses

Attleborough is home to around 410 businesses.

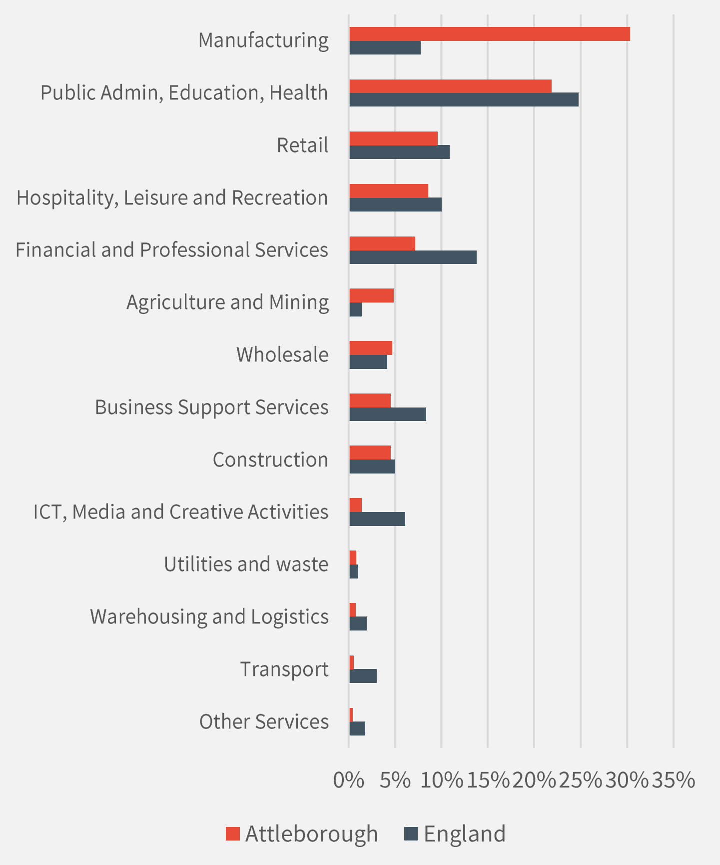
1



Attleborough's jobs

There are around 5,000 jobs in Attleborough.

2



Attleborough's economy:

- Some of Attleborough's largest sectors by number of businesses include Financial and Professional Services (17% of total businesses), Construction (13%) and Retail (12%). The business base has grown significantly over the last decade, growing by 27% since 2010.
- There are around 5,000 jobs in Attleborough. Between 2015 and 2019, the number of jobs in Attleborough has grown by 11%
- Attleborough's largest employment sectors are Manufacturing (30% of total employment), Public Administration, Education and Health (22%) and Retail (10%).
- Higher levels of businesses and employment within Manufacturing and specifically Food Manufacturing may mean that Attleborough has been less exposed to COVID-19 impacts as this industry has continued to function throughout the pandemic and lockdowns.
- High levels of employment within Public Admin, Education and Health in Attleborough may enable the town to withstand some of the economic impacts of COVID-19 through increased demand for work within this sector.

3

HATCH

Source: IDBR, BRES, and UK Business Count. Analysis of Attleborough's economy draws on the ONS Inter-Departmental Business Register to provide a more granular understanding of the local economy, whilst statistics for England draw on the Business Register and Employment Survey and UK Business Count data sources, also from the ONS.

Attleborough's **major employers**

Using the Inter-Departmental Business Register, Attleborough top 10 largest businesses by number of employees have been mapped across the town.

The analysis has excluded businesses which have their registered address in Attleborough, but do not have employees based on site. Typically, this includes recruitment agencies or cleaning businesses which are registered to a residential address.

This shows the importance of food manufacturing and agriculture. It also demonstrates the importance of the town's relationship with its villages and rural hinterlands which contain many of the town's largest businesses.

Top 10 largest employers

1. Banham Poultry Ltd
2. Lee & Plumpton Limited
3. Sainsburys Supermarkets Ltd
4. Priority Central Services Ltd (Ellingham Hospital)
5. Breckland Lodge Ltd
6. Westward Care Homes Ltd
7. Dominions Pubs and Bars Limited
8. Norfolk Academies
9. Norfolk County Council
10. Banham Group Ltd

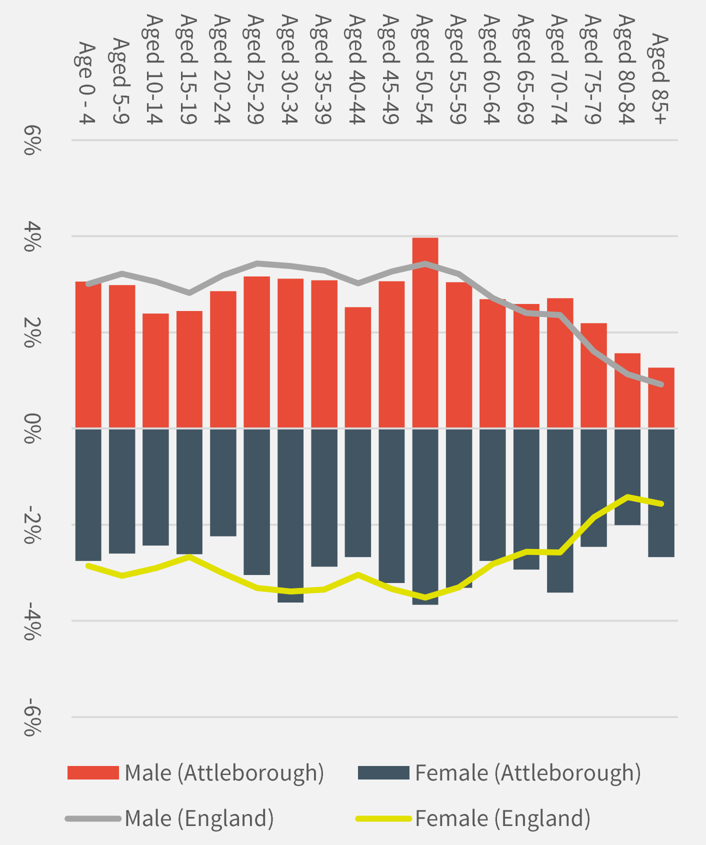
Source: IDBR

People: **labour market characteristics**

Attleborough's demographics

Attleborough has an ageing population with 24% of its residents aged 65 or over.

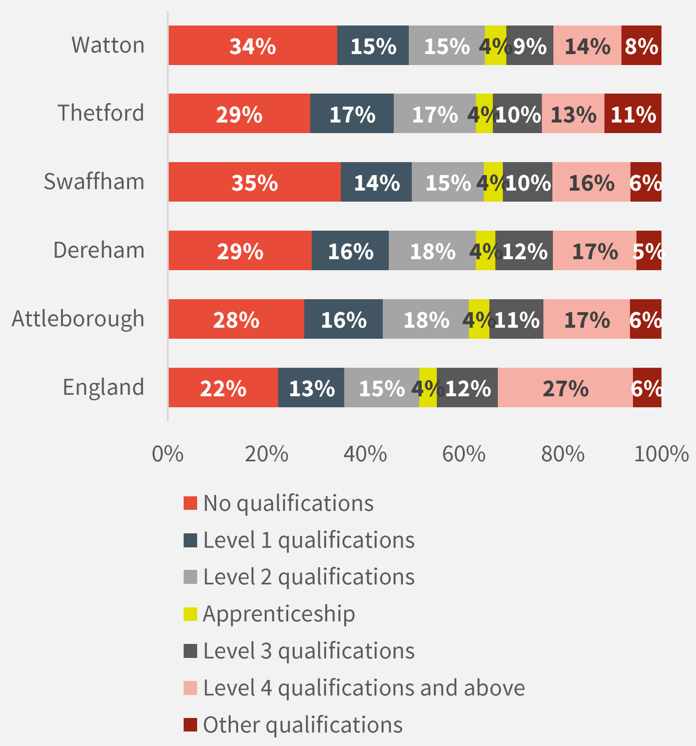
1



Attleborough's skills

Qualification levels are predominantly low and mid level, with only 17% holding level 4 in 2011.

2

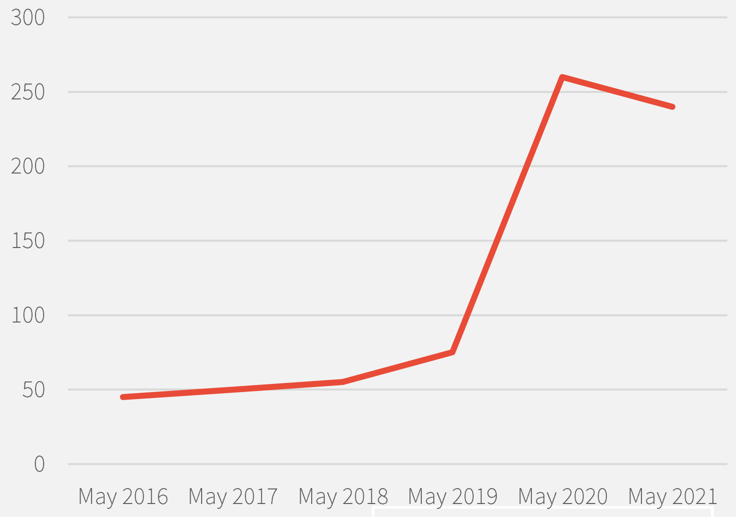


Note: 2011 Census provides latest picture of qualification levels across at a town-level. This data cannot be directly compared to other datasets such as the Annual Population Survey, as the 2011 Census profiles the entire population whilst other datasets focus on the population aged 16-64.

Attleborough's people:

- Higher Education participation in Attleborough is low. Despite this, 28.8% of Attleborough's young people go to university, which is the highest rate out of Breckland's five market towns.
- Attleborough's claimant count rose significantly during the first few months of the pandemic. Rising by 246% in May 2020 compared to the same month in 2019.

Attleborough claimant count, 2016-2021



Source: Population Estimates. ONS

Place: **Attleborough's place vitality**

Attleborough's vitality

Attleborough's deprivation challenges most acutely affect the north of the town in areas adjacent to the A11.

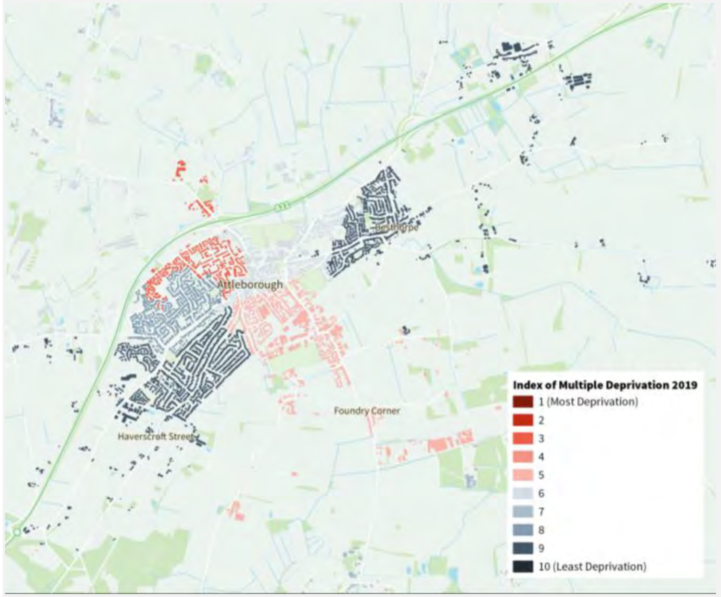
1

Attleborough's infrastructure

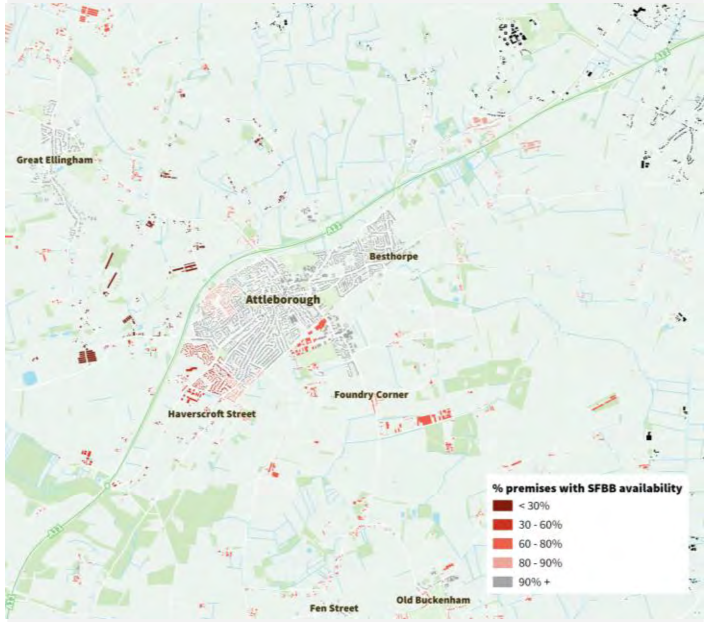
Digital connectivity is good with 47.8% of premises having access to the fastest broadband speeds.

2

Index of Multiple Deprivation, 2019



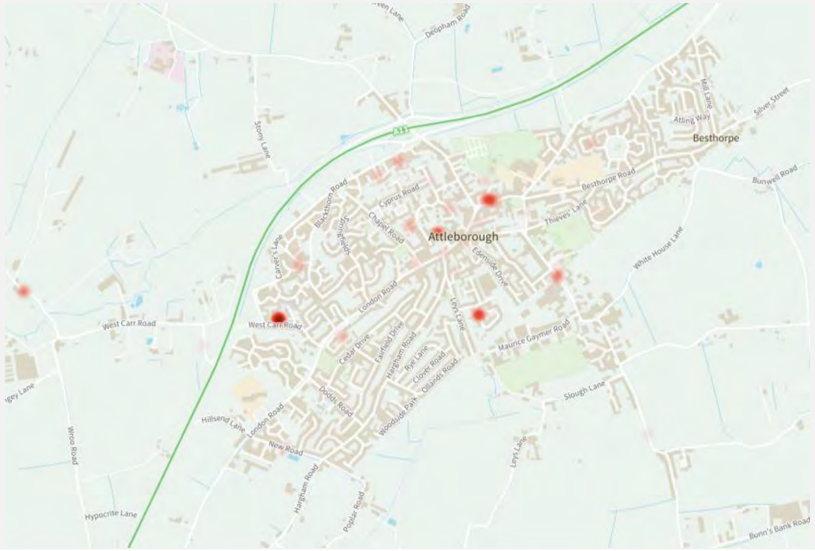
Superfast broadband connectivity, 2020



Attleborough's place vitality:

- Retail vacancy rates in Attleborough are very low. In 2021, only 6% of properties were vacant. Of these, less than 1% were long-term vacant indicating a strong demand for retail space.
- Crime in Attleborough is low. Between February 2020 and January 2021, around 600 criminal offences within Attleborough accounted for 6% of total incidents across Breckland.

Attleborough crime hotspots, 2020



Source: Ministry of Housing, Communities and Local Government; Ofcom.

Attleborough's **retail vitality (1): Supply**

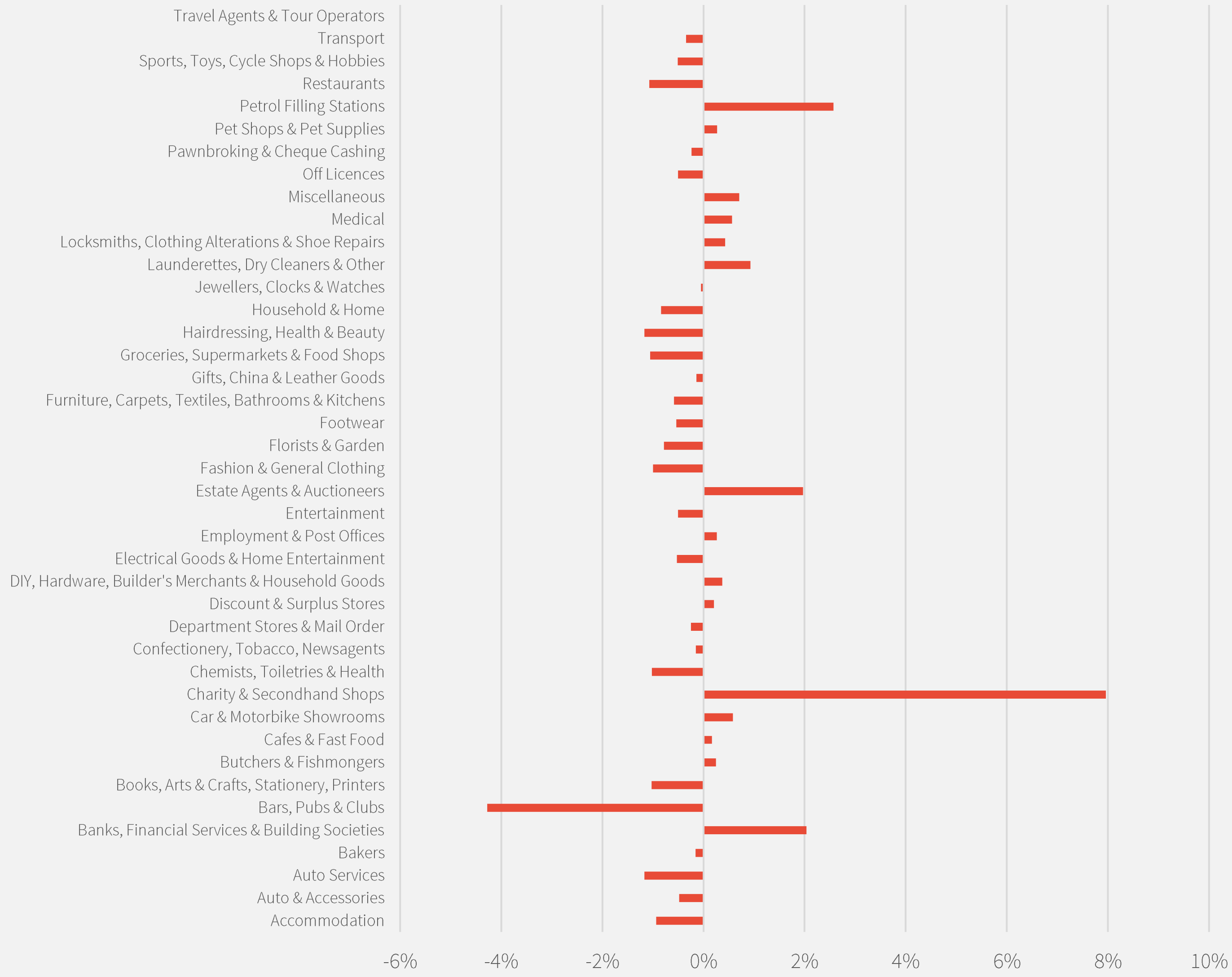
Large oversupply of charity shops threatens economic vitality…

The Local Data Company's supply data analyses the proportion of retail categories in a town versus the national average. This shows that relative to the national picture, Attleborough has a significant oversupply of Charity and Second-hand shops. Conversely, Attleborough has an undersupply of Bars, Pubs and Clubs.

While the struggles of high street retailers is well documented, the growth of high street charity shops has bucked this trend – with pre-pandemic sales continuing to grow. Research from the accountancy firm BDO found that in 2019, Charity retail sales grew by 3.5 per cent in October, by 5.8 per cent in November and by 3.9 per cent in December compared to the same months in 2018.

The success of charity shops is largely due to the ability to offer consumers a uniquely interesting and enriching shopping experience due to the huge variety of items on sale. Furthermore, a move to more sustainable consumerism has seen consumers seeking out secondhand items in order to reduce the impact of the fashion industry on the environment – meaning the sector could see further growth post-pandemic.

Over/under supply analysis vs. the GB average, 2021



Source: Local Data Company, BDO

Attleborough's **retail vitality (2): Change**

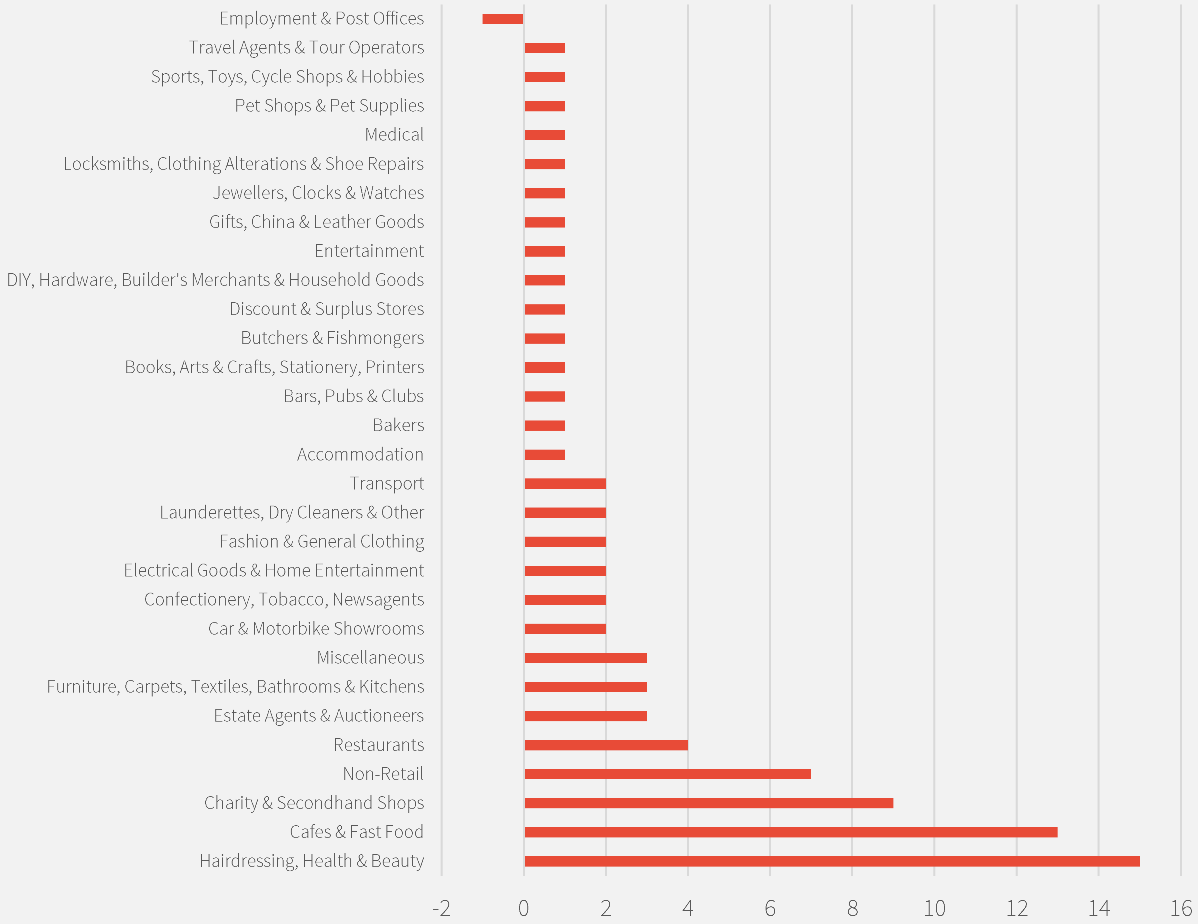
Limited net losses across all retail categories over the last five years...

The chart on the right assesses net openings/closings by category of retail.

This shows that between 2014 and 2021, Dereham's largest net gains have been in Hair, Health and Beauty businesses (+15) and cafes and fast-food outlets (+13). The only net loss has been in Employment and Post Offices (-1).

This reflects Attleborough's very low vacancy rates (6%). Attleborough's retail provision is also likely to have remained resilient throughout the COVID-19 pandemic due to the town's concentration of essential retailers. Over a third (35%) are classified as 'essential' – reflecting the town's importance as a key service centre for both residents and those living in surrounding villages.

Largest net increase/decrease by category, 2014/15-2020/21



Attleborough's **commercial property**

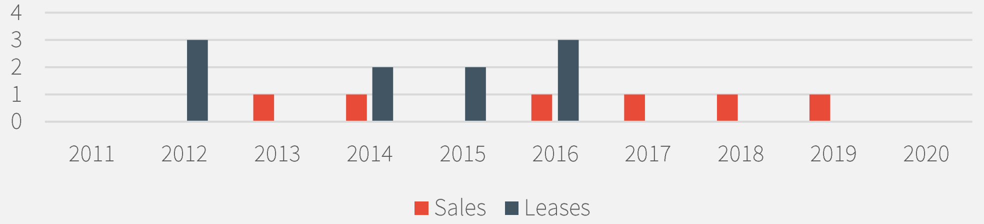
Opportunity to leverage Attleborough's strategic location and planned growth to reimagine the town's commercial property offer...

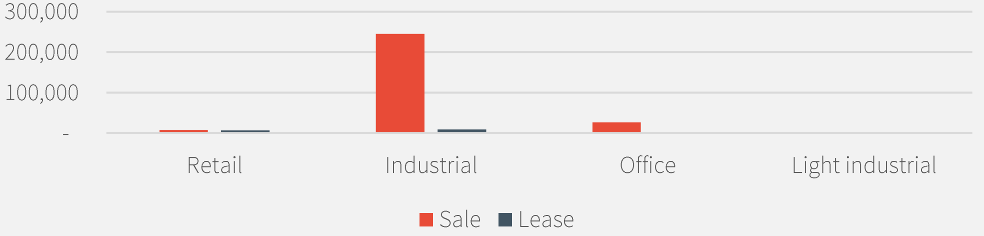
Attleborough has a small commercial property inventory which is dominated by industrial space.

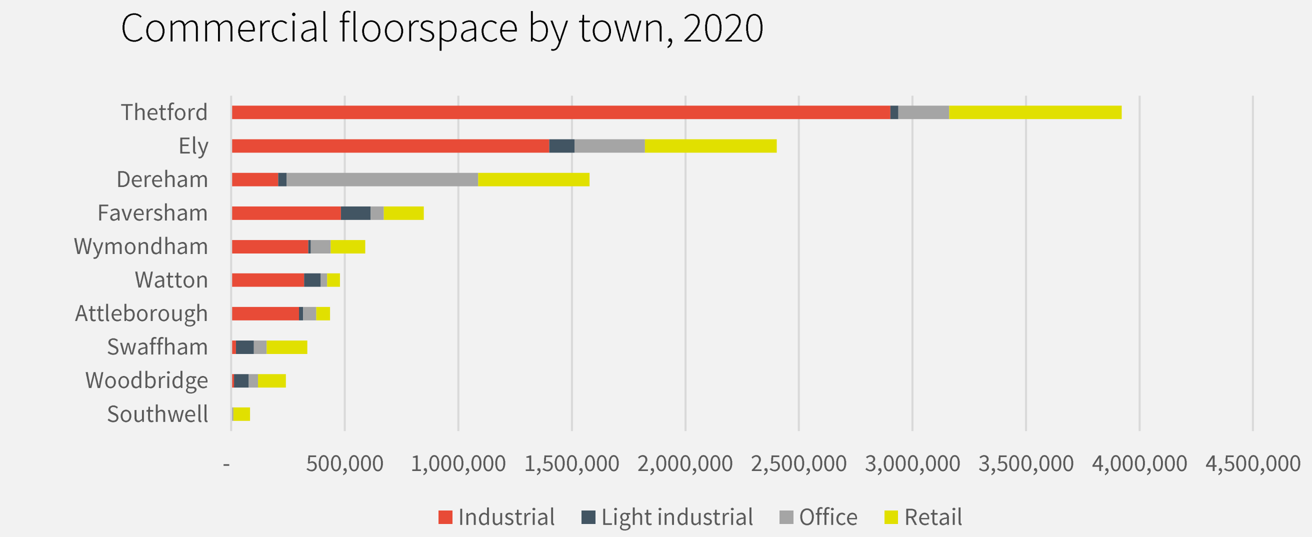
There is no data for average office rental values in Attleborough which reflects the low amount of stock and that there were no commercial transactions in 2020. The majority of transactions have been sales – suggesting the presence of a number of anchor businesses in the town.

Due to the planned growth of the town through the urban extensions, it is important that the Town Delivery Plans outline a clear economic vision focusing on delivering appropriate commercial property to secure balanced economic growth – providing employment opportunities close to new residential development. As a key location on the A11, there is an opportunity to think more broadly about Attleborough's role on the Cambridge Norwich Tech Corridor and how employment space can support this vision.

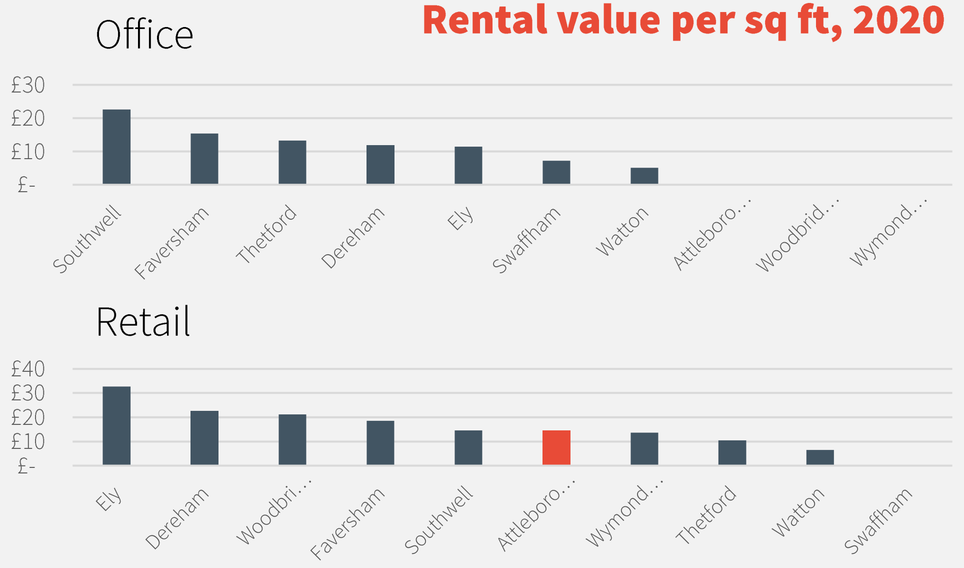
Commercial transactions, 2011-2020







Rental value per sq ft, 2020



Attleborough's **accessibility (1)**

Existing road infrastructure is integral to Attleborough's growth potential…

Attleborough's position on the A11 helps to explain the town's economic geography. The town has a very large catchment with almost half a million people (497,000) within 45 minutes drive time of the town centre. This is the largest of any of Breckland's market towns and 302,654 working age people are within this catchment.

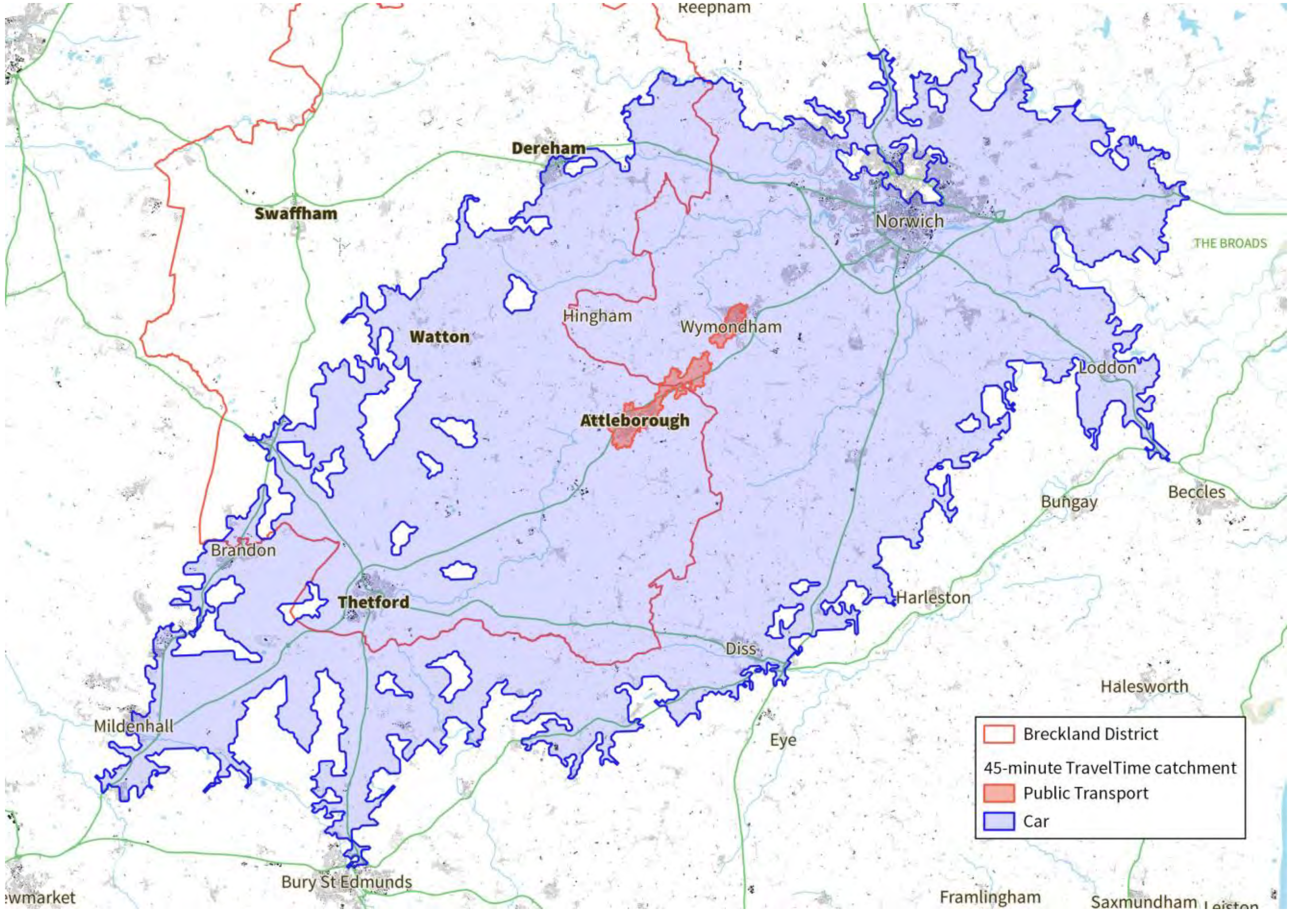
The town's existing road infrastructure means that key urban centres such as Norwich are easily commutable by car – opening up high value employment opportunities for many residents in places such as the Norwich Research Park.

Conversely, public transport connectivity is limited, with only Wymondham accessible within 45 minutes by public transport (depending on train scheduling). Improving public transport provision to Attleborough's hinterlands and surrounding villages such as Great Ellingham can help to underpin its future vitality.

Attleborough's catchment population by mode of travel

45-minute catchment	Total catchment population	Proportion of Breckland's residents
Public Transport	23,000	9%
Car	497,000	63%

Attleborough's 45-minute travel time catchments by car and public transport



Attleborough's **accessibility (2)**

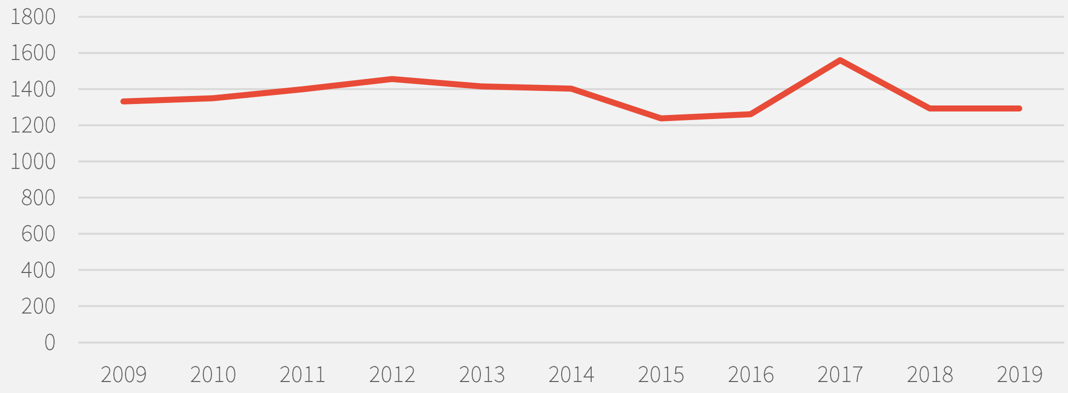
Stagnant car usage which could change as population grows…

Since 2009, car usage in and around Attleborough town centre has remained largely stagnant. This is shown in the graph on the right which uses the Department for Transport's Traffic Count data which provides street-level data for every junction-to-junction link on the motorway and 'A' road network.

The data shows that in 2019 the average number of vehicles using the Dereham exit of the A47 was 6,726 every day. As the planned growth for the town gathers pace, it will be important to continue to monitor vehicle counts, and wherever possible encourage active and public transport usage into and between town centres. Planned infrastructure as part of the SUE includes new bus routes into the town centre/train station and new walking and cycling routes into the town centre.

Passenger entries and exit data shows the growing importance of the railway to connect Attleborough to the east's major urban centres. Served by Greater Anglia, the station links the town to adjacent towns of Wymondham and Thetford and also regional economic hubs of Norwich and Cambridge. Levering the station as a key asset can help to cement and enhance the town's position on the Cambridge Norwich Tech Corridor and will be important to future economic identity.

Total vehicle count on Leys Lane, Attleborough, 2009-2019



Annual average daily flow by mode –Leys Lane, 2019

Pedal cycle - 43 (3%)

Bus/coach - 0 (0%)

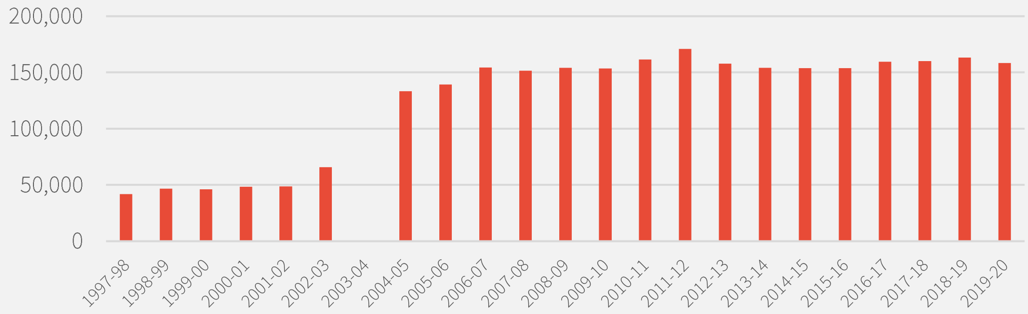
Motorbike - 8 (1.0%)

LGV - 171 (13%)

Cars/taxis – 1,112 (86%)

HGV - 3 (0%)

Attleborough Station – Entries and Exits, 2009-2019



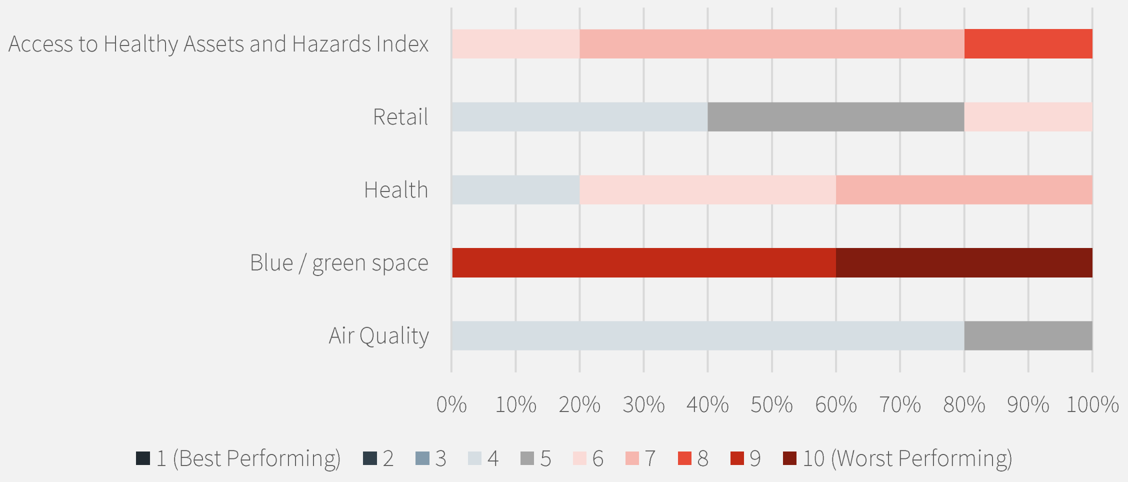
Source: DfT Traffic Counts, ORR Station Exits and Entries

Social **infrastructure and healthy living**

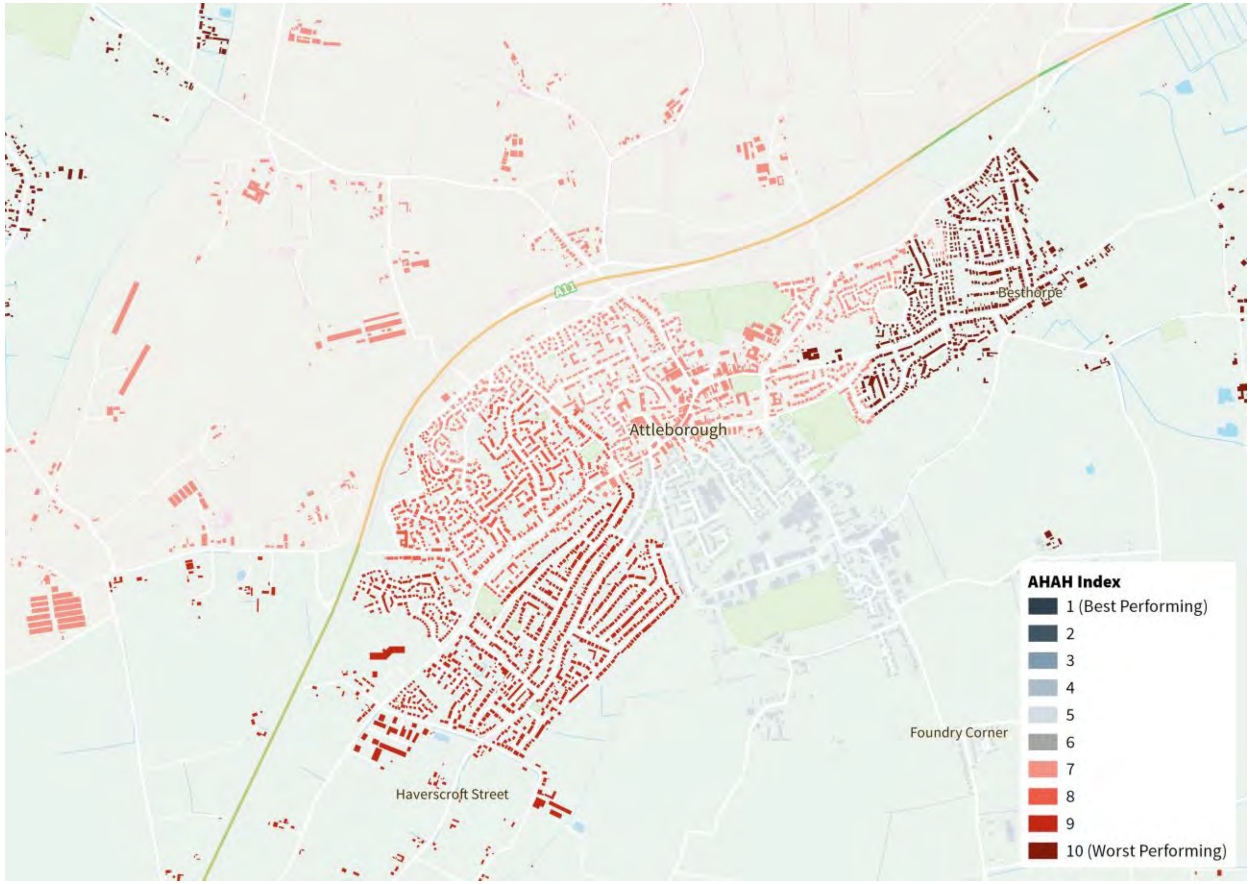
Access to the natural environment is the most significant issue for Attleborough's neighbourhoods, with access to healthy assets most acutely affecting the northeast of the town…

Overall scoring by the multi-dimensional AHAH index demonstrates poor performance, most acutely affecting the town's periphery particularly to the south of the town centre. All of Attleborough's neighbourhoods fall within the top 30% worst performing in terms of the access to the natural environment, including access to green spaces such as parks and recreational spaces, and blue space such as rivers, canals and lakes. Provision of active and passive green infrastructure as part of the SUE will be integral to creating healthy, balanced communities.

Access to Health Assets and Hazards Index in Attleborough



Access to Health Assets and Hazards Index by neighbourhood



Source: Access to Healthy Assets and Hazards

Attleborough: **Observational analysis**

Town Centre Boundary

Attleborough lies just off the A11 which bypasses the town. The train station sits on the main Norwich to Cambridge railway line.

Key

Town centre boundary

Significant Planning Applications

Significant development has taken place in Attleborough over recent years, with a particular emphasis on an increase in housing stock on the town's peripheries.

The Attleborough Sustainable Urban Extension (no.8 on the adjacent map) will bring substantial growth through the introduction of new housing, schools and other infrastructure and amenities, formed around a new local centre.

Key

- Planning applications - permission granted
- Planning applications - outline permission granted
- Planning applications - part 2 approval
- Neighbourhood plan site selections

N

0 500m

supporting is between 75 and 86 dwellings

Planning applications – outline permission granted

5. 3PL/2017/1171/O – Residential development of 48 dwellings
6. 3PL/2019/0500/O – Residential development
7. 3PL/2013/0278/O – Retail, office, and leisure uses,petrol filling station & associated works including access

Planning applications – part 2 approval

8. 3PL/2017/0996/O - 217ha allocated for a Strategic Urban Extension of at least 2,680 net new dwellings

Neighbourhood Plan site selection

9. LE. P1 – The creation of a business park for small and medium sized enterprises.
10. LE. P2 – The redevelopment of the area including Queens Square Care Park for mixed use development including retail and community uses.
11. SLC. P2 – The provision of outdoor sports facilities

Breckland District Council Assets

The adjacent map shows the sites under BDC ownership, largely clustered in and around the town centre.

Whilst BDC ownership is limited, a number of key sites are owned by the Town Council. These include the playing fields and skate park to the east of Station Road, Gaymers Field and Connaught Hall. The old library on Connaught Road is currently under Norfolk County Council Ownership.

Key

BDC Ownership

Culture, Community and Leisure Assets

Attleborough has a cluster of uses around the town centre including schools, a library, pubs and the town hall. Apart from the town hall, community spaces are located around the station area. It has a number of sports facilities including outdoor pitches, a skate park, bowls club and sports hall, but the latter is said to be not fit for purpose by local sports clubs.

Key

- Culture
- Health and Leisure
- Education
- Community Space
- Religious
- Medical, care and other services

Culture

C1. Bar 33
C2. The Griffin Pub
C3. The Mulberry Tree
C4. The Cock Inn

Health and Leisure

H1. Attleborough Sports Hall
H2. Attleborough Town FC
H3. Connaught Hall Park and Skate Park
H4. Connaught Bowls Club
H5. Attleborough Junior Football Pitches

Education

E1. Attleborough Academy
E2. Attleborough Infant School
E3. Attleborough Primary School

Community Space

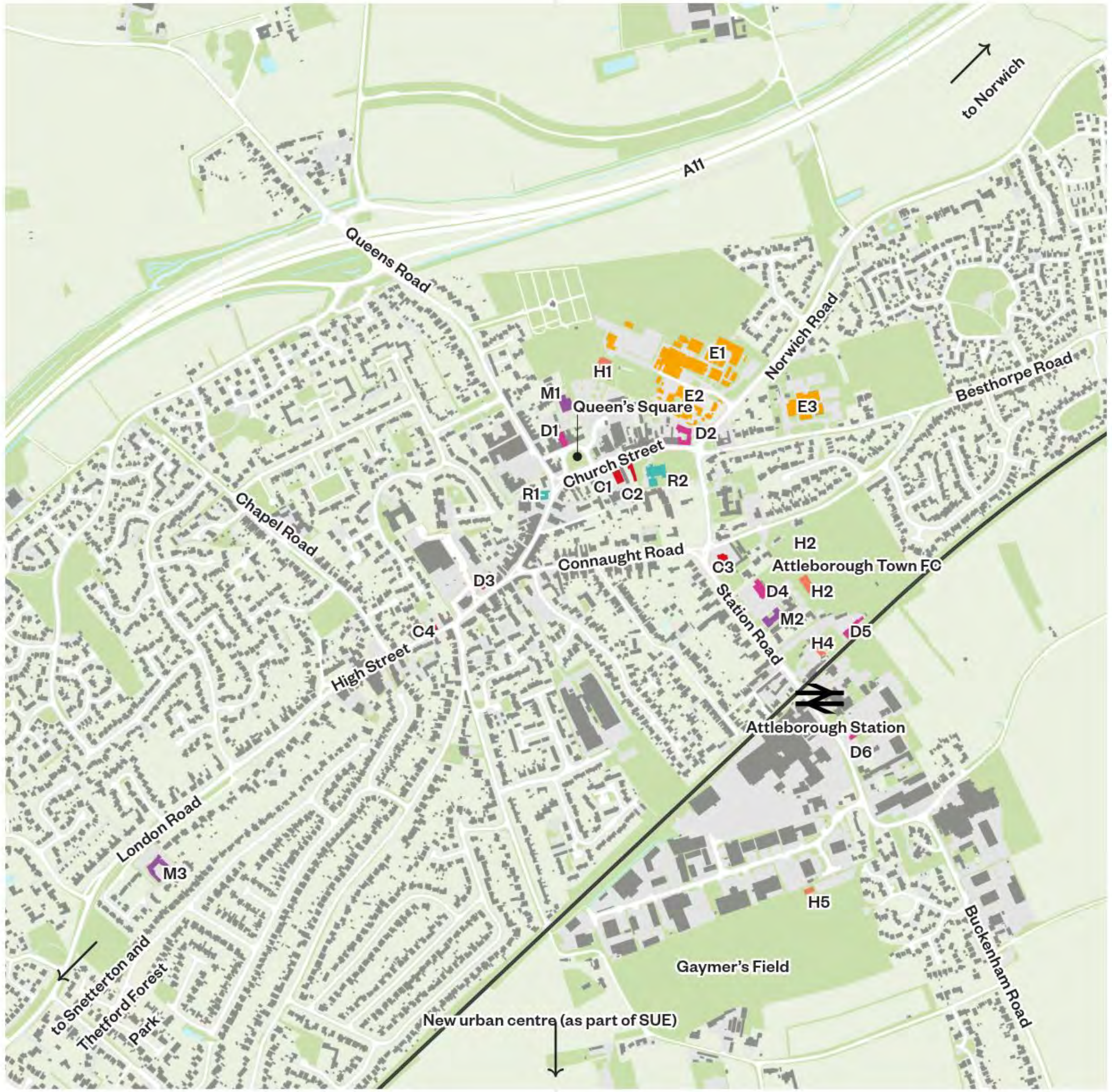
D1. Attleborough Town Hall
D2. Attleborough Library
D3. Attleborough Post Office
D4. Connaught Hall
D5. Attleborough Scouts
D6. Attleborough Community Hub

Religious

R1. Amoghasiddhi Kadampa Buddhist Centre
R2. St. Mary's Church

Medical, Care and Other Services

M1. Queens Square Surgery
M2. Attleborough Surgery
M3. Attleborough Constabulary



Heritage Assets and Conservation Zones

As seen in the adjacent map, Attleborough's conservation area occupies a large area of the town centre, extending to include part of London Road and the listed Attleborough Station.

Whilst the core of historic buildings are clustered around St. Mary's Church and Queen's Square, there are very few listed buildings and heritage assets.

Key

- Notable heritage assets
  - H1. St Mary's Church
  - H2. Town Hall
  - H3. Former library (now a BDC asset of community value)
- Listed buildings
- Conservation area
- Primary shopfronts
- Secondary shopfronts
- Town centre boundary

N

0 250m

Denominations of Open Space

There is a lack of areas of significant green space both in the town centre and in the peripheries of the town. The Open Space Study of 2015 identified a deficit of 8 hectares of space.

There are no recognisable parks in Attleborough and few public footpaths linking the town to the countryside. A proposed linear park (policy SLC. P3) and footpath links have been identified in the Neighbourhood Plan to the North of the railway line.

Key

- Open space (local plan denomination)
- Green space

N

0 250m

Architectural Features


Pocket of public realm with seating on the corner of Queens Square


Buildings lining north side of Queen's Square, including Town Hall


St. Mary's Church


Church Street


Scouts buildings


Griffin Hotel, c. 1550


Attleborough Station and Banham Poultry


Queens Square

Attleborough's architectural character is largely defined by the heritage assets clustered around Queen's Square.

As well as buildings dating to the middle ages, it boasts some handsome market town architecture along the high street.

Vacant sites

Attleborough's independent shops both serve the local market, as well as being a draw to shoppers from nearby towns and villages.

Despite the economic shock of the pandemic, the town has experienced minimal closures and vacancies. Some new businesses have opened recently.

Old library. Currently under NCC ownership and used as a storage facility

Hamilton Acorn Ltd.

Public Transport and Active Travel

Attleborough is well served by bus routes with most of the town being 5 minutes/400m from a bus stop. It benefits from strong rail links to Cambridge, Norwich and Stanstead (via Cambridge) and connections to the North (via Ely), but is poorly connected with other market towns (excluding Thetford). Cycle and walking infrastructure is poor. There are very few public rights of way or footpaths and, despite the level landscape, there is no cycling provision. Stationed between Thetford and Norwich which it also offers opportunities for cycle connections. It lacks strategic or long distance cycling or walking routes resulting in poor access to the surrounding open spaces that have the potential to be used for recreation and exercise.

Key

- Bus routes
- Bus stops
- Footway

N

0 250m

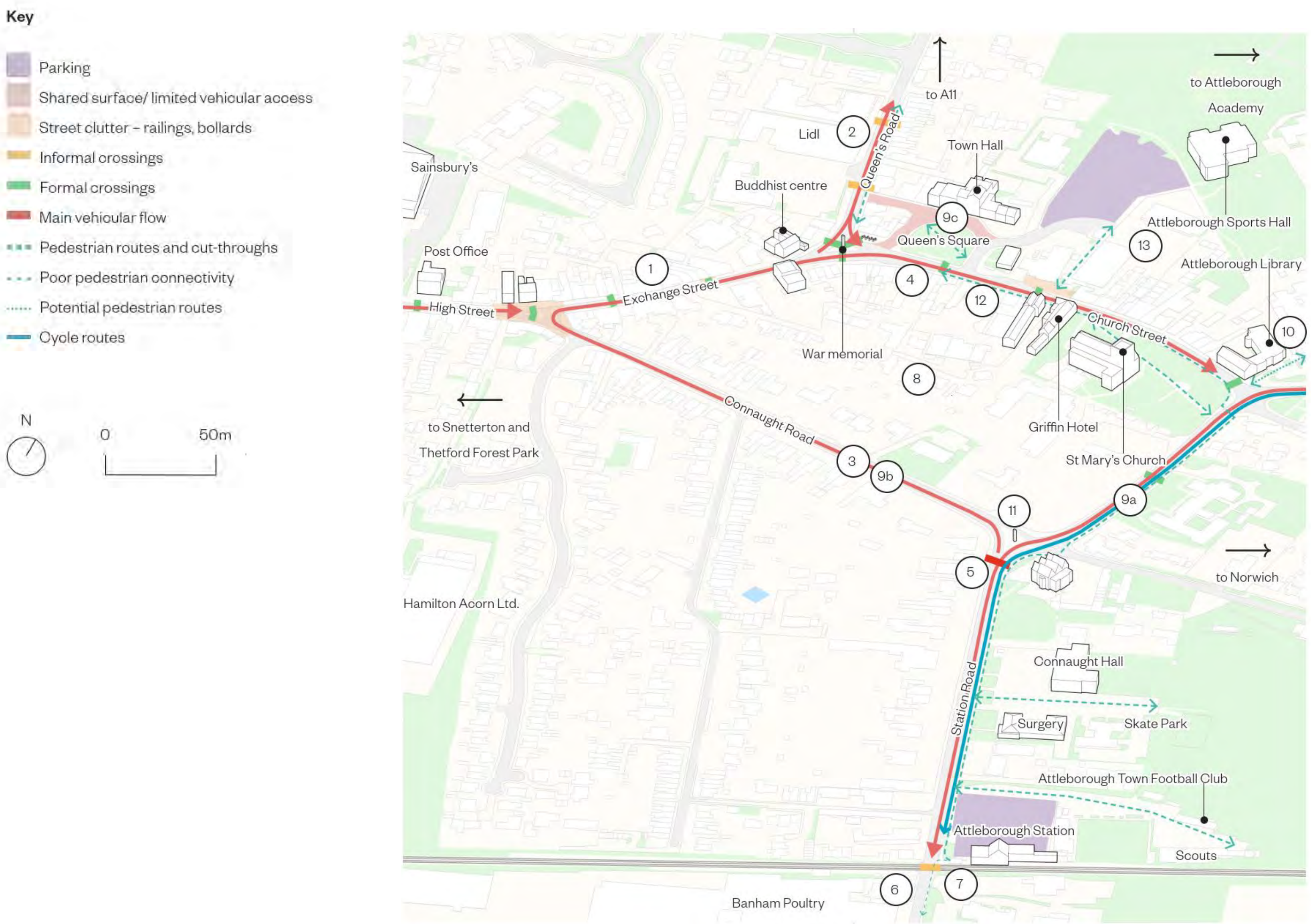
Transport and Movement

Perceptive Study of Public Realm

1. Exchange Street becomes congested with traffic and pedestrians during peak commuting hours. This is exacerbated by narrow pavements.
2. Queens Road is perceived to be unsafe for pedestrian movement (of particular concern during school run), owing to a lack of formal crossings.
3. Noise pollution and regular speeding along Connaught Road due to an absence of speed control measures.
4. Insufficient loading provision. Vehicular and pedestrian movement is interupted when the single loading bay south of Queen's Square is occupied (HGVs often block access to Queen's Square car park).
5. Unsafe crossing at junction between Surrogate Street and Connaught Road, due to its proximity to the roundabout.
6. Route south of station, and towards Gaymers Fields, is not serviced by a cycleway.
7. Poor accessibility and pedestrian movement around the station. There is minimal buffer from the level-crossing and traffic on Station Road, and the footpath does not continue south of the station. This connection is of particular importance in the context of the Strategic Urban Extension to the south.
8. Limited internal permeability and pedestrian cut-throughs within one-way loop.
9. £4.6m invested in recent road layout and highway improvements:

- a. Phase 1: implementing two-way system on Surrogate Street
- b. Phase 2: Improvements on Connaught Road
- c. Phase 3: resurfacing and reduced vehicular access to Queen's Square

10. Desired future link to Decoy Common via linear park.
11. Poor legibility of junction, leading from station to town centre.
12. Main bus link runs along Exchange St and Church St. NCC are interested in connecting the link to Attleborough Station.
13. M&Co. parking adjacent to Queen's Square car park. Underused due to risk of large fines.
14. Crossings in the town centre are perceived to be unsafe for those with disabilities and restricted mobility.
15. Town council has received funding to provide additional cycle parking.



2.3

Town Deep-Dive: Thetford

Thetford's economic **history**

1

Characterised by a rich history and heritage assets

Thetford possesses a range of heritage assets which tell the story of its rich historical past. The town boasts:

- An Iron Age site of national importance with links to Boudicca
- Important Viking remnants
- Major Norman and medieval assets
- Home to one of the world's great democratic thinkers, Thomas Paine

2

A town transformed by the industrial revolution

Victorian Thetford was transformed by the industrial revolution which laid the groundwork for the town's rich agricultural heritage and reputation. The founders of traction engines and crop science were from Thetford and companies such as Bidwells chose to locate in the town – providing hundreds of jobs for the town's residents.

3

Thetford's rapid population growth

Following World War II, Thetford grew at a faster rate than any other English town – taking significant new populations from London. Thetford was part of the Town Expansion Scheme which attracted families from large cities to move to smaller country towns. Significant housing growth was required to accommodate 5,000 Londoners which included the expansion of the town on the south bank of the river on the location of the late Saxon town.

4

Jobs to meet the needs of a growing town

To meet the needs of a growing population, Thetford's industry grew significantly and over 9,000 new jobs had been created by the end of the 1960s. Four new industrial estates were created around the town which hosted internationally recognised companies such as Thermos and Danepak. Despite this, Thetford is still defined by its strong agricultural sector. This is reflected in the town's demographics, with high concentrations of Russian, Slovakian, Spanish and Portuguese families settling in the area.

Source: Thetford Town Council

Local **policy review**

Over the planning period, Thetford is expected to accommodate at least:

6,500 new homes

28 hectares of new employment land

To deliver this, key sites include:

1. **Thetford Urban Extension:** 5,000 dwellings
2. **Near Tesco:** 4 hectares
3. **Lodge Way:** 14.5 hectares
4. **Off Croxton Road:** 2.5 hectares
5. **Off Norwich Road:** 7.2 hectares

Thetford's key development sites and Local Plan allocations

Source: Breckland Local Plan, Thetford Area Action Plan DPD

Economic **Function**

Thetford's businesses

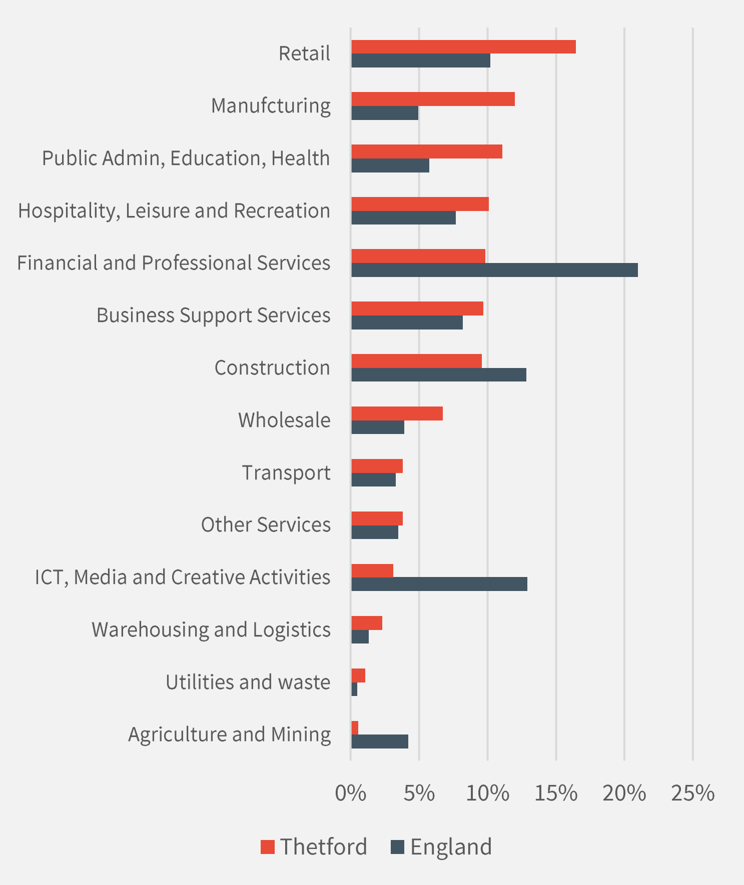
Thetford is home to around 740 businesses.

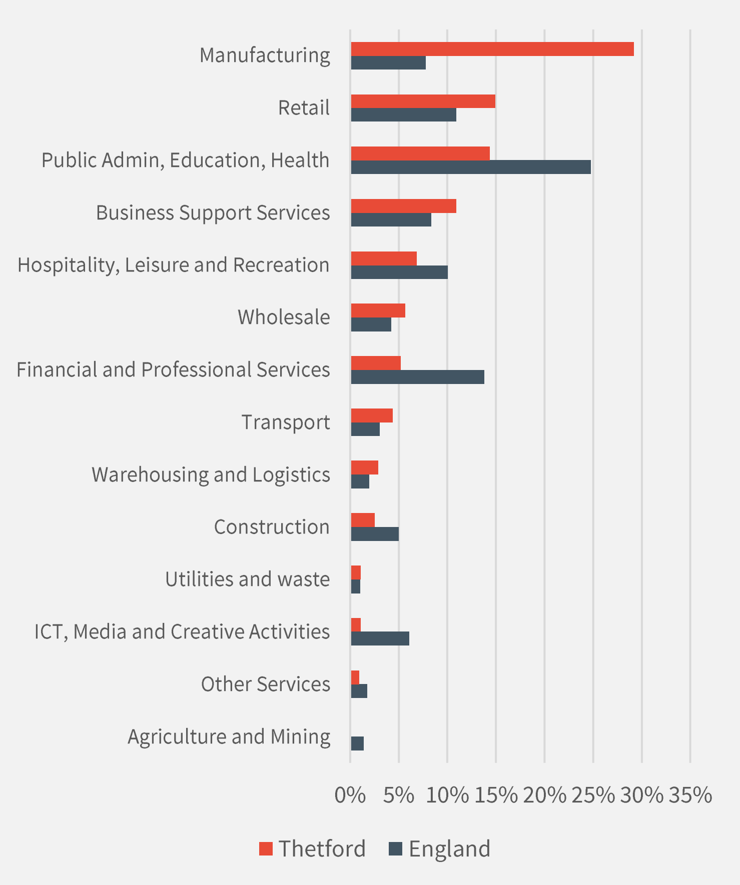
1

Thetford's jobs

Around 11,200 jobs are supported in Thetford.

2



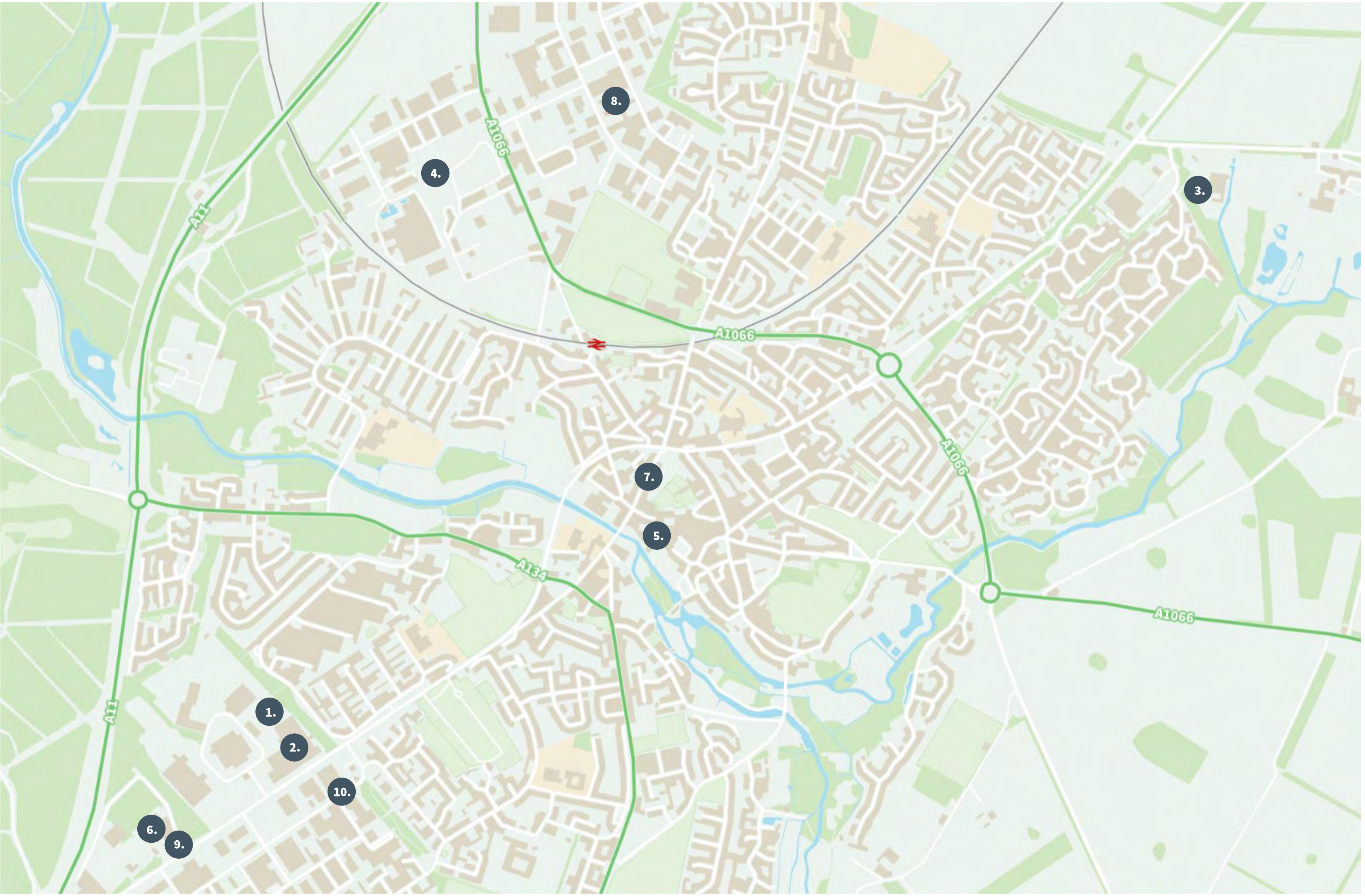


Thetford's economy:

- Thetford's business base has increased by 3% since 2010
- Some of Thetford's largest sectors by number of businesses include Retail (16% of all businesses), Manufacturing (12%) and Public Admin, Health and Education (11%).
- There are around 11,200 jobs in Thetford, however jobs growth has remained stagnant – showing no change since 2015.
- Thetford's largest employment sectors are Manufacturing (29% of total employment), Retail (15%) and Public Admin, Education and Health (14%).
- Higher levels of businesses and employment within Retail than is seen nationally means that Thetford has likely been more exposed to the impacts of COVID-19 than other places.
- High levels of businesses within Manufacturing, specifically Food and Higher Tech Manufacturing sectors, may have supported the town's ability to withstand some of the economic impacts of COVID-19 through continued or increased demand within these sectors.

Source: IDBR, BRES, and UK Business Count. Analysis of Thetford's economy draws on the ONS Inter-Departmental Business Register to provide a more granular understanding of the local economy, whilst statistics for England draw on the Business Register and Employment Survey and UK Business Count data sources, also from the ONS.

Thetford's **major employers**



Using the Inter-Departmental Business Register, Thetford's top 10 largest businesses by number of employees have been mapped across the town.

The analysis has excluded businesses which have their registered address in Thetford, but do not have employees based on site. Typically, this includes recruitment agencies or cleaning businesses which are registered to a residential address.

This shows the importance of food manufacturing to the town's economy. Spatially, major employers are located in the town's business parks rather than the town centre.

Top 10 largest employers

1. 2 Sisters Food Group Ltd
2. Baxter Healthcare Ltd
3. Tesco Stores Ltd
4. Easy Cleaning Solutions Ltd
5. Recroot Ltd
6. Sainsburys Supermarkets Ltd
7. Contacts Support Services Ltd
8. TNT UK Ltd
9. Bradecca Restaurants Limited
10. Advanced Air (UK) Limited

Source: IDBR

People: **labour market characteristics**

Thetford's demographics

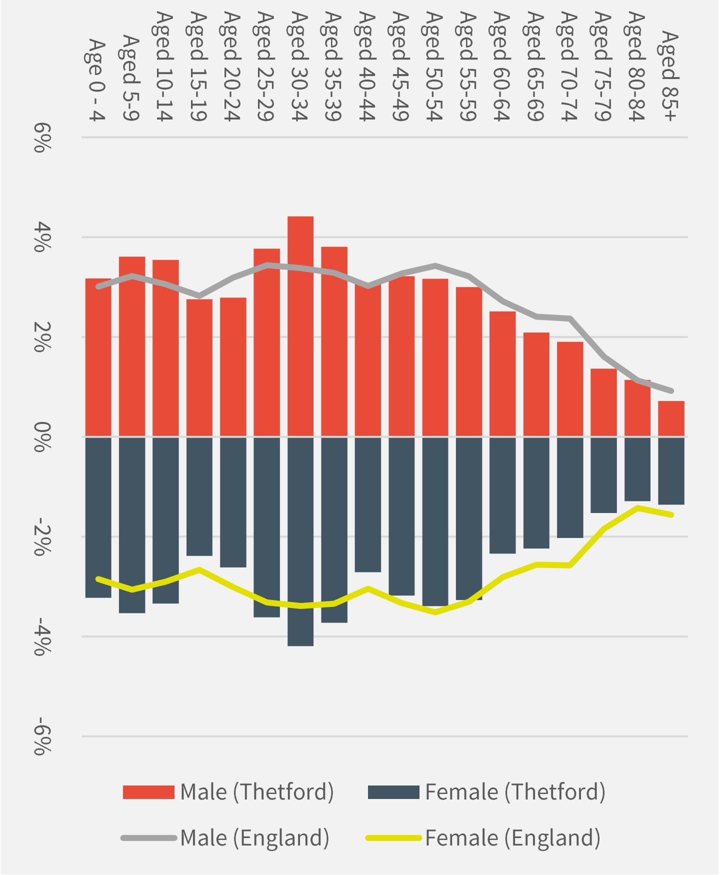
Thetford has a young population relative to Breckland's other market towns, with 21% of its residents aged under 16.

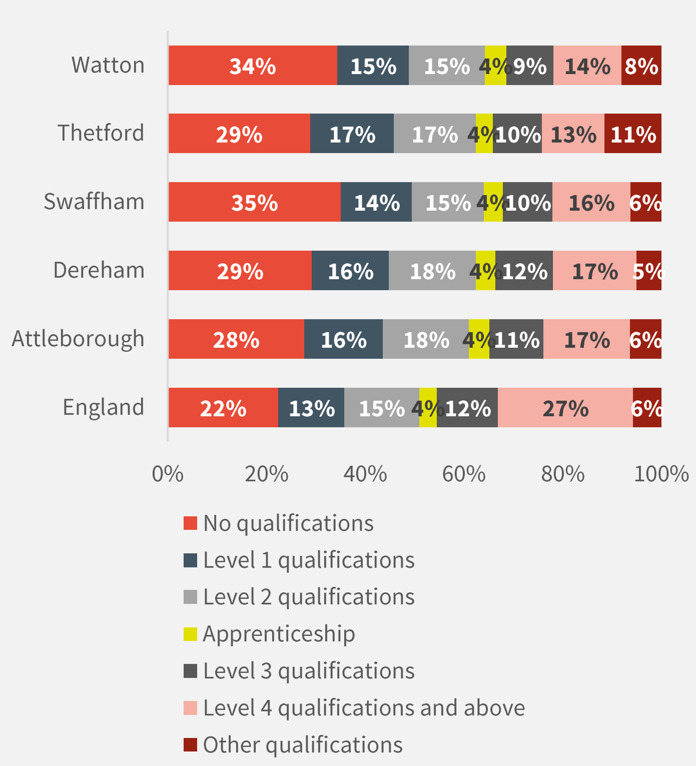
1

Thetford's skills + employment

Qualification levels are predominantly low and mid level, with only 13% holding level 4 in 2011.

2



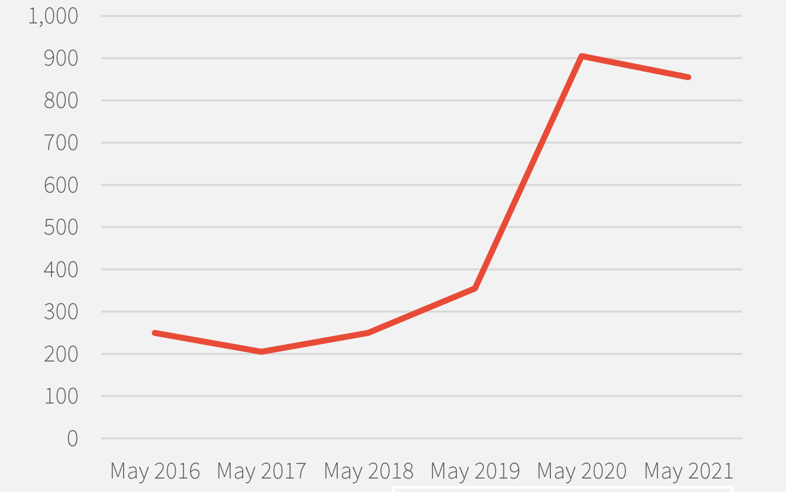


Note: 2011 Census provides latest picture of qualification levels across at a town-level. This data cannot be directly compared to other datasets such as the Annual Population Survey, as the 2011 Census profiles the entire population whilst other datasets focus on the population aged 16-64.

Thetford's people:

- Higher Education participation in Thetford is low. Only 17.6% of Thetford's young people go to university, which is the lowest rate out of all of Breckland's five market towns.
- Thetford's claimant count rose significantly during the first few months of the pandemic. In May 2020, there were an additional 550 claimants in Thetford compared to the same month in 2019.

Thetford claimant count change, 2016-2021



Source: Population Estimates. ONS

Place: **Thetford's vitality**

Thetford's vitality

Thetford's deprivation is widespread across most of the town, with least deprivation in the north east.

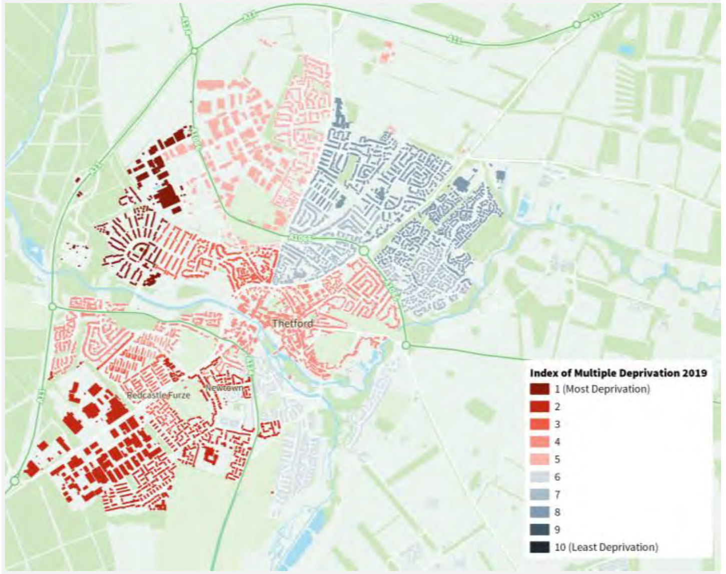
1

Thetford's infrastructure

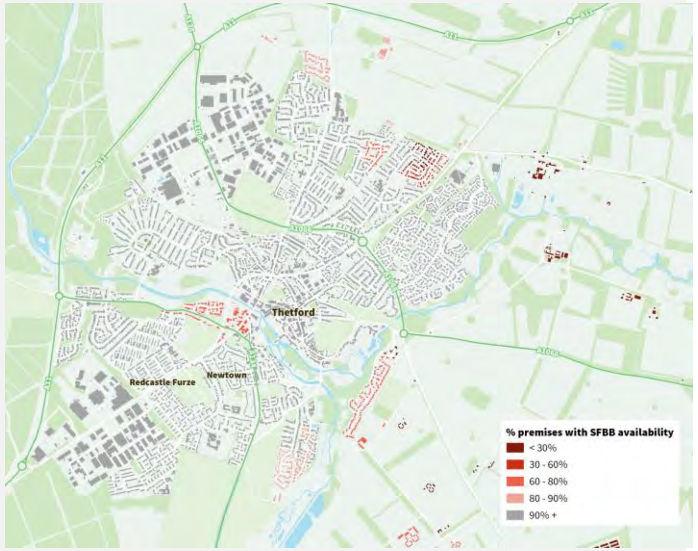
Digital connectivity is average with 96.9% premises able to access Superfast speeds and 19.7% able to access the fastest broadband speeds.

2

Index of Multiple Deprivation, 2019



Superfast broadband connectivity, 2020



Thetford's place vitality:

- The Abbey Estate is one of the most deprived neighbourhoods in the country – falling within the top 10% most deprived LSOAs nationally.
- Between February 2020 and January 2021, around 3,100 criminal offences within Thetford accounted for 31% of total incidents across Breckland and 46% of all criminal offences within the District's five market towns.

Thetford crime hotspots, 2020

Source: Ministry of Housing, Communities and Local Government; Ofcom.

Thetford's **retail vitality (1): Supply**

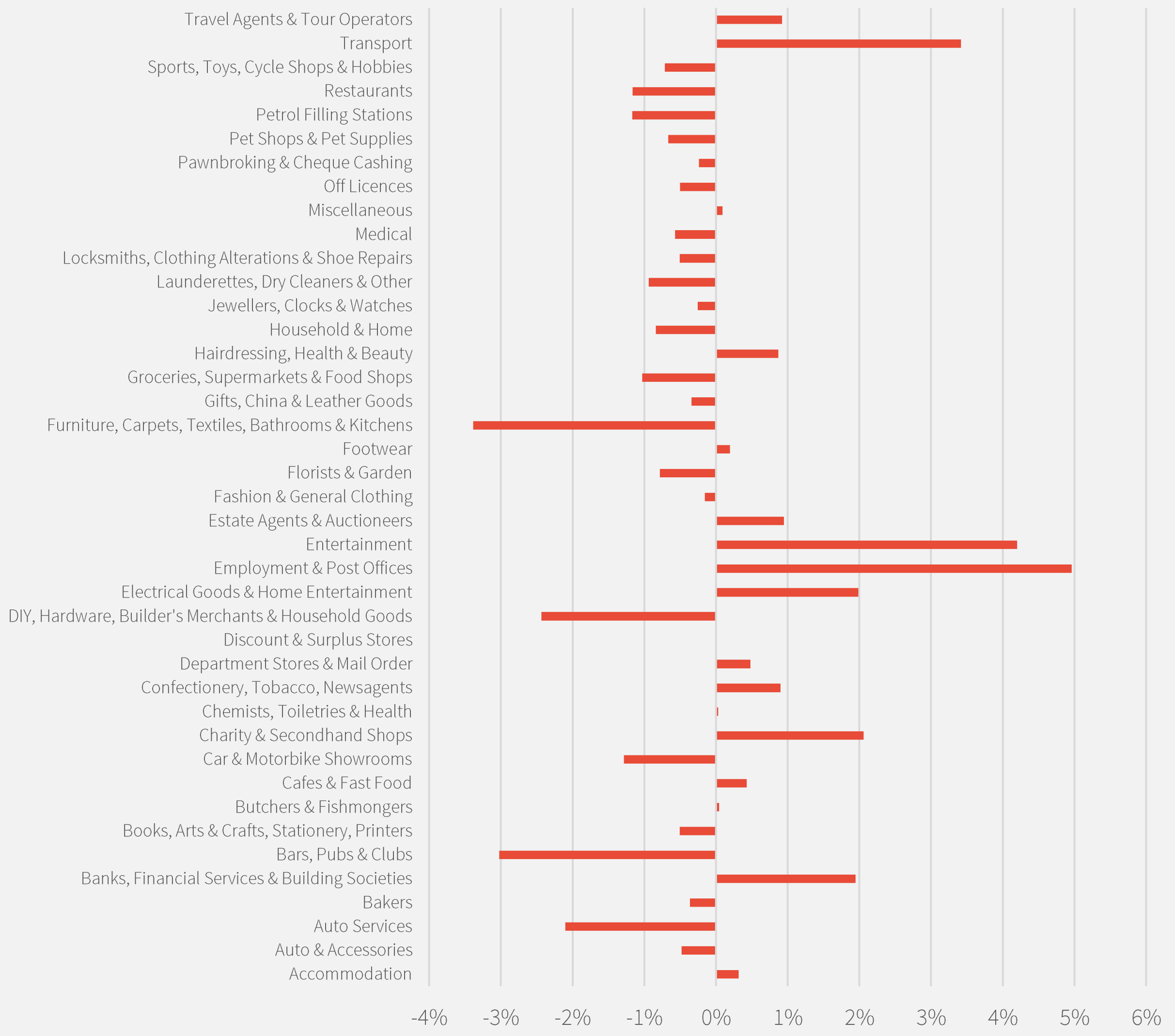
Significant variance in supply compared to national averages...

The Local Data Company's supply data analyses the proportion of retail categories in a town versus the national average. This shows that relative to the national picture, Thetford has much greater over/undersupply challenges compared to Breckland's other market towns. Discrepancies in supply can indicate a lack of retail diversity, which could be perpetuating Thetford's retail vitality challenges. Thetford has some of the highest retail vacancies across the district. Many of these (7%), are classified as long-term vacant – meaning they have been vacant for 3 years +.

The highest levels of oversupply are in Employment and Post Offices (+6%), Entertainment (+4%), and Transport (+3%). Most significant undersupply typology is in Furniture, Carpets, Textiles, Bathrooms and Kitchens (-3%).

Several furniture stores have closed in the town in recent years, including Cosy Carpets, which leaves behind a high-profile vacant town centre building – representing a visual indicator of high street decline.

Over/under supply analysis vs. the GB average, 2021



Source: Local Data Company

Thetford's **retail vitality (2): Change**

Growth in Hairdressing, Health and Beauty shops and the need for economic diversification…

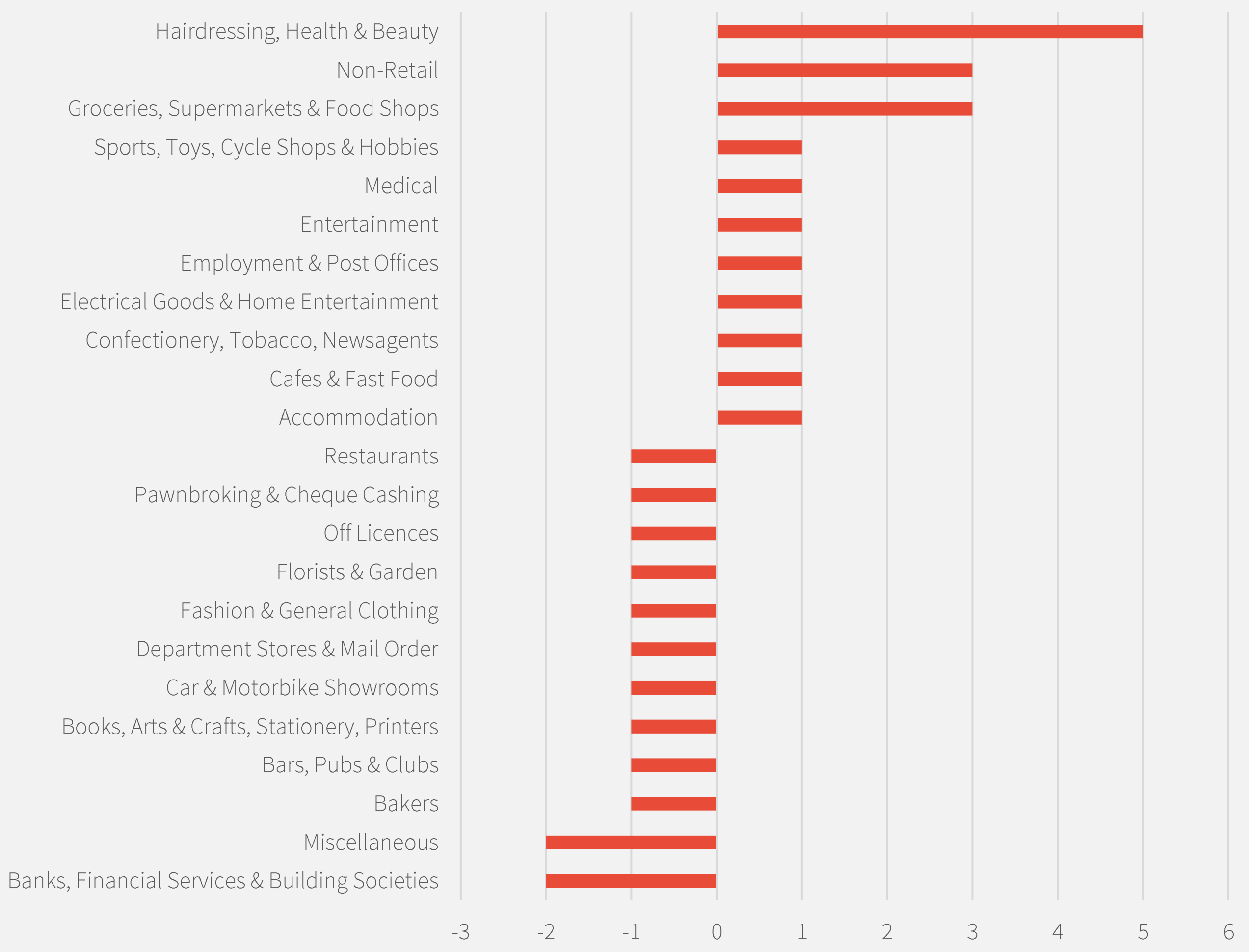
The chart on the right assesses net openings/closings by category of retail.

This shows that between 2014 and 2021, Thetford's largest net gains have been in Hair, Health and Beauty businesses (+5) and non-retail (+3). Non-retail businesses include professional services typically found on high streets such as accountants and solicitor's offices. Economic diversification will be essential to the future of Thetford town centre – providing high value employment opportunities and safeguarding place vitality.

Net closings have been spread evenly across a range of retail typologies. The largest closures have been in Banks, Financial Services and Building Societies (-2).

This reflects broader shifts in high street banking strategy – reinforcing the macro economic factors governing the evolution of high streets. Since 2015, more than 4,000 bank and building societies have closed nationally. These are frequently prominent town centre buildings which need to be reimagined to respond to changing demands.

Largest net increase/decrease by category, 2014/15-2020/21



Source: Local Data Company, Which?

Thetford's **commercial property**

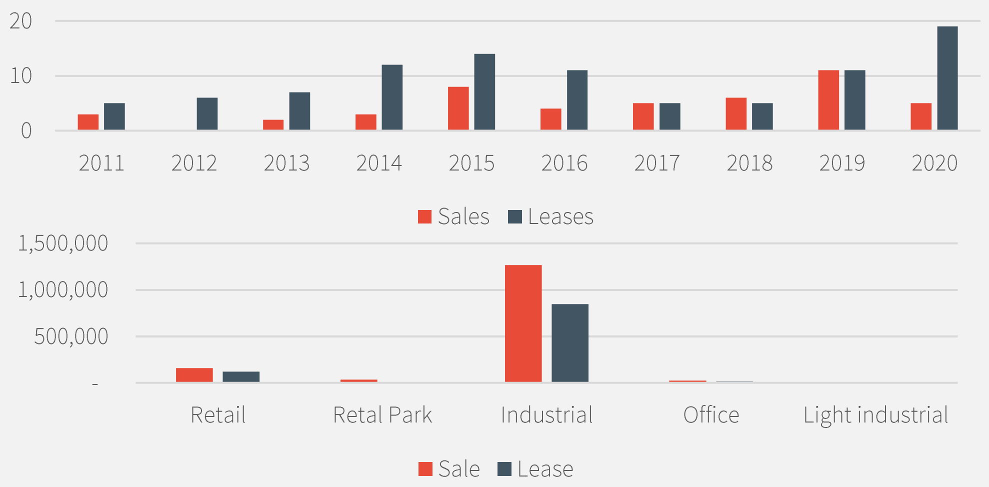
Thetford contains the most mature commercial property market of all of the five towns…

Thetford contains just under 4m square foot of commercial space.

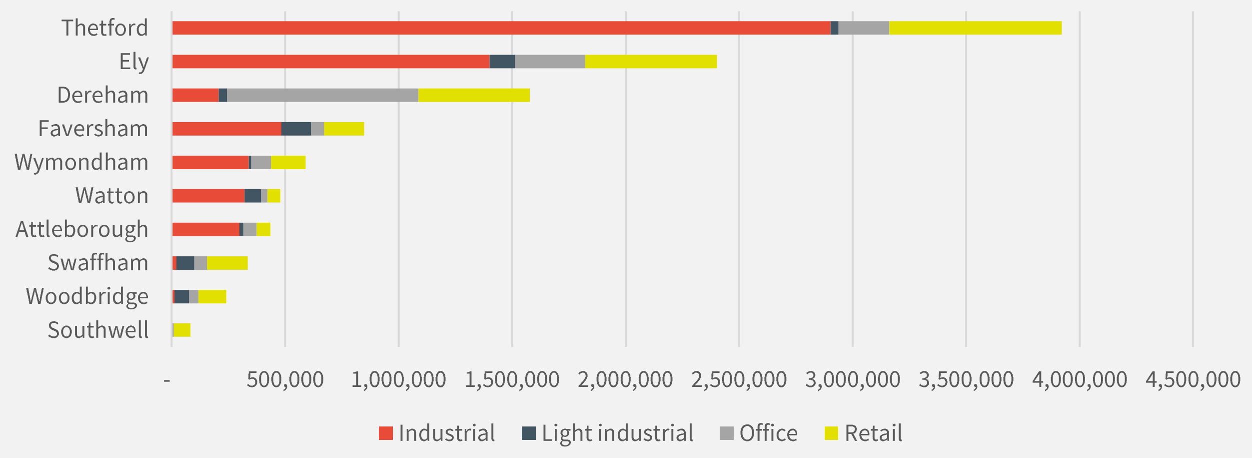
Almost three quarters of space (74%) is industrial, with only 225,000sqft of office space. Interventions proposed through the Towns Fund seek to address this – providing flexible office space to support economic diversification.

Similarly commercial rents are very low. Rent per square foot in England was £30 in 2020, almost three times higher than rents in Thetford (£11). Low values are likely to deter private investment but offer significant opportunity for public bodies to use their asset strategies more aggressively to act as place shapers – building the change they want to see.

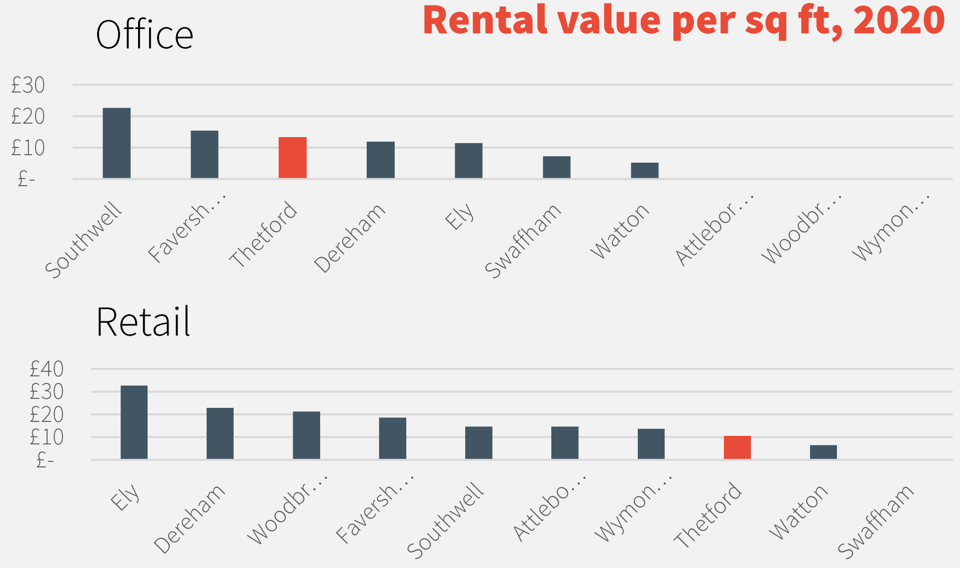
Commercial transactions, 2011-2020



Commercial floorspace by town, 2020



Rental value per sq ft, 2020



Source: Costar

Thetford's **accessibility (1)**

East-west connectivity is integral to Thetford's success…

301,000 people are able to access Thetford within a 45 minute drive time. This includes access to key towns in Suffolk such as Stowmarket, Bury St Edmunds, and Newmarket. Despite this, Thetford's driving catchment reaches only 56% of Breckland's population – indicating poor connectivity between Thetford and the North east of the district (including Dereham).

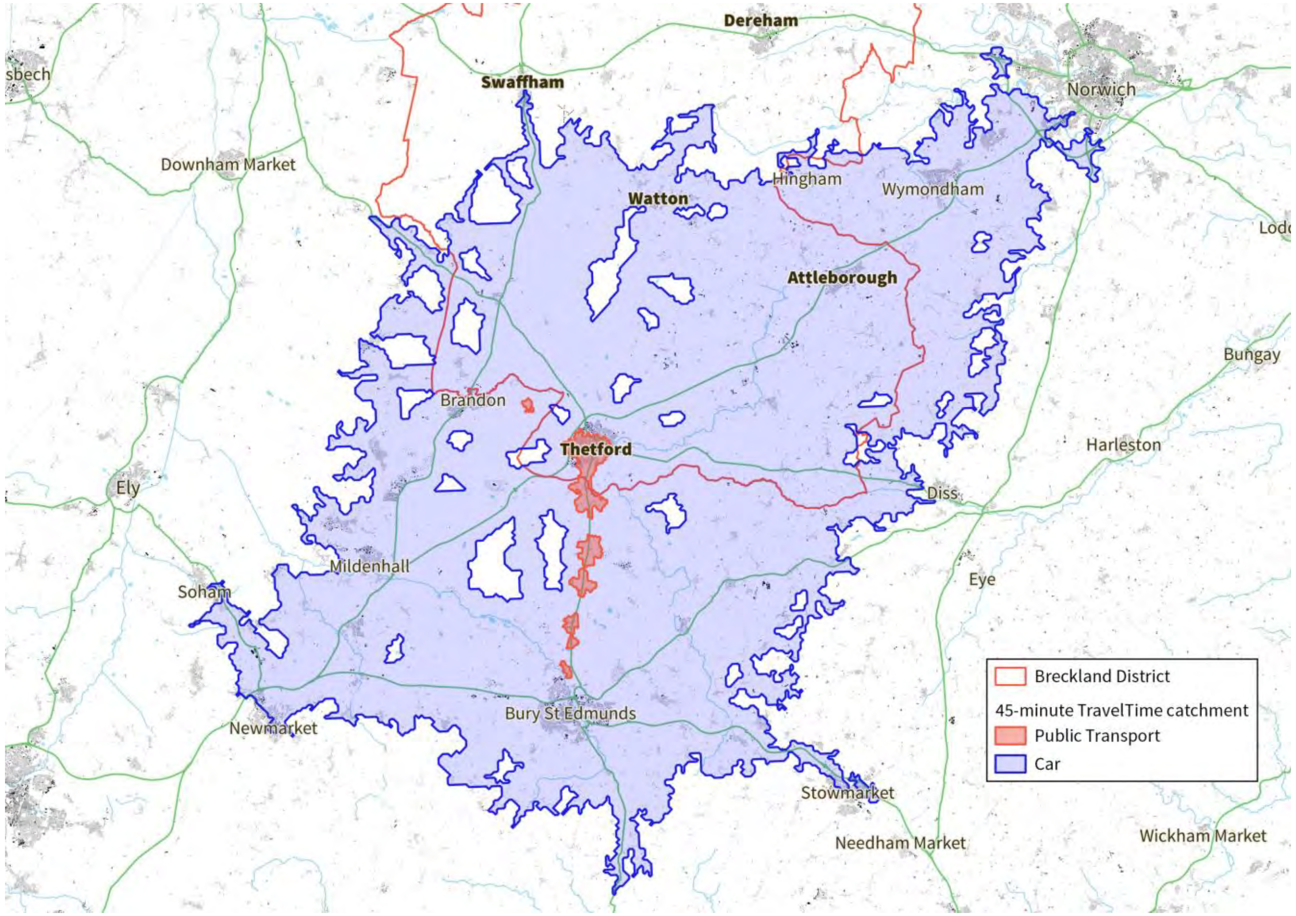
Only 14% of residents can access the town in the same time by public transport. Thetford Station is a key asset for the town and the gateway can provide an economic focus for the town. Currently, the rail line creates severance challenges between the north and south of the town and the station's potential as an economic anchor is underutilised.

Through the Levelling Up Fund submission, proposals include reinvigorating the existing station building, improving disabled access to the station through a new footbridge and repurposing the vacant Keystone Innovation Centre.

Thetford's catchment population by mode of travel

45-minute catchment	Total catchment population	Proportion of Breckland's residents
Public Transport	22,000	14%
Car	301,000	56%

Thetford's 45-minute travel time catchments by car and public transport



Thetford's **accessibility (2)**

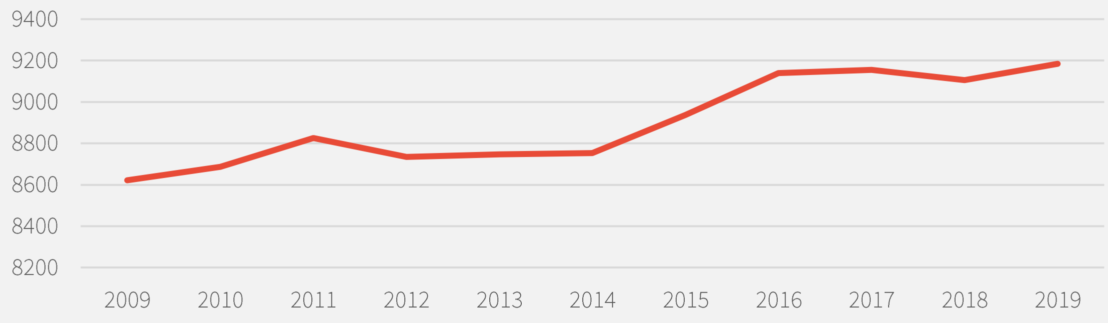
Growing congestion on key routes into town…

Thetford station provides critical links to both Cambridge and Norwich. Ridership has grown significantly over the past two decades. Since 1997, the number of entries and exits at Thetford has increased by 252%. There is an opportunity to capture this increased footfall around the station gateway to drive economic growth and diversification.

Traffic in Thetford has increased substantially over the last 10 years. Between 2009 and 2019, the number of vehicles accessing the town from the A11 junction increased by 7%. Due to Thetford's economic composition, a significant proportion of this (20%) was either Light Goods Vehicles or Heavy Goods vehicles.

The Thetford Urban Extension vision has been designed to enhance active travel and *"with the provision of pedestrian and cycle routes to the town and surrounding countryside".*

Total vehicle count on A134-A11 junction, 2009-2019



Annual average daily flow by mode – A134-A11 junction, 2019

Pedal cycle - 40 (0.4%)

Bus/coach - 70 (0.8%)

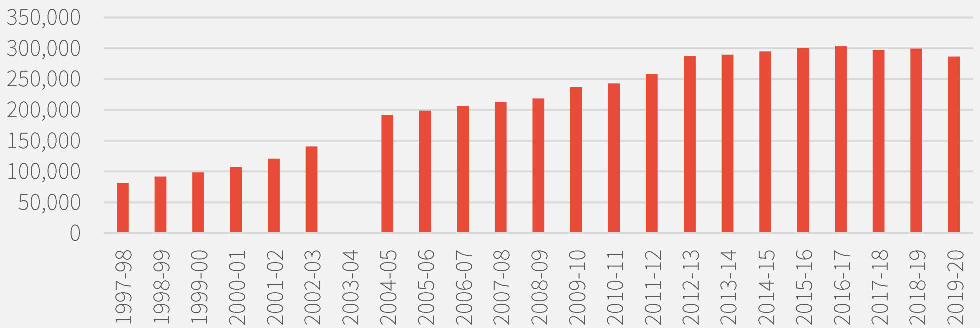
Motorbike - 27 (0.3%)

LGV – 1,338 (14.6%)

Cars/taxis – 7,200 (78.4%)

HGV - 552 (6%)

Thetford's station entries/exits (1997-2020)



Source: DfT Traffic Counts, ORR

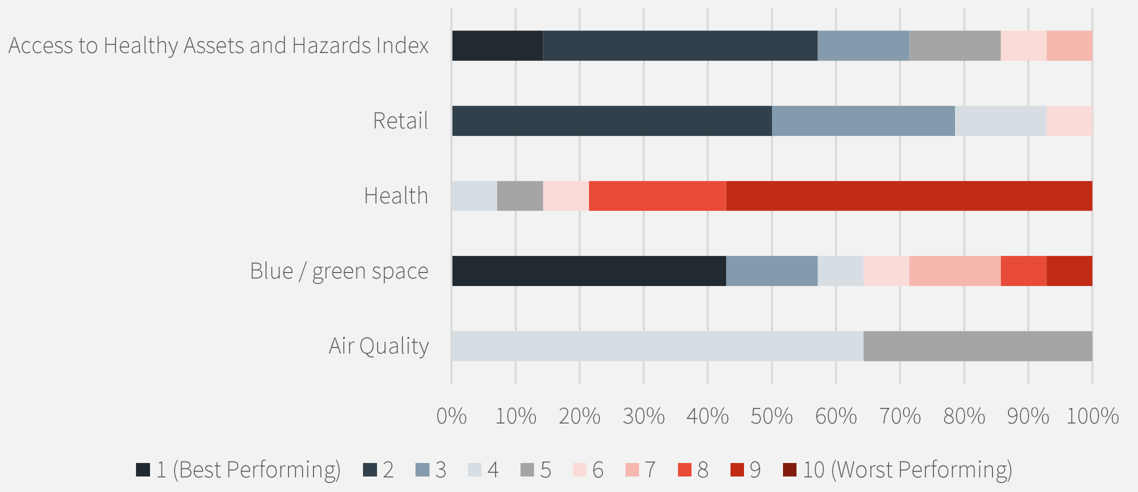
Social **infrastructure and healthy living**

Thetford's natural assets are integral to place identity…

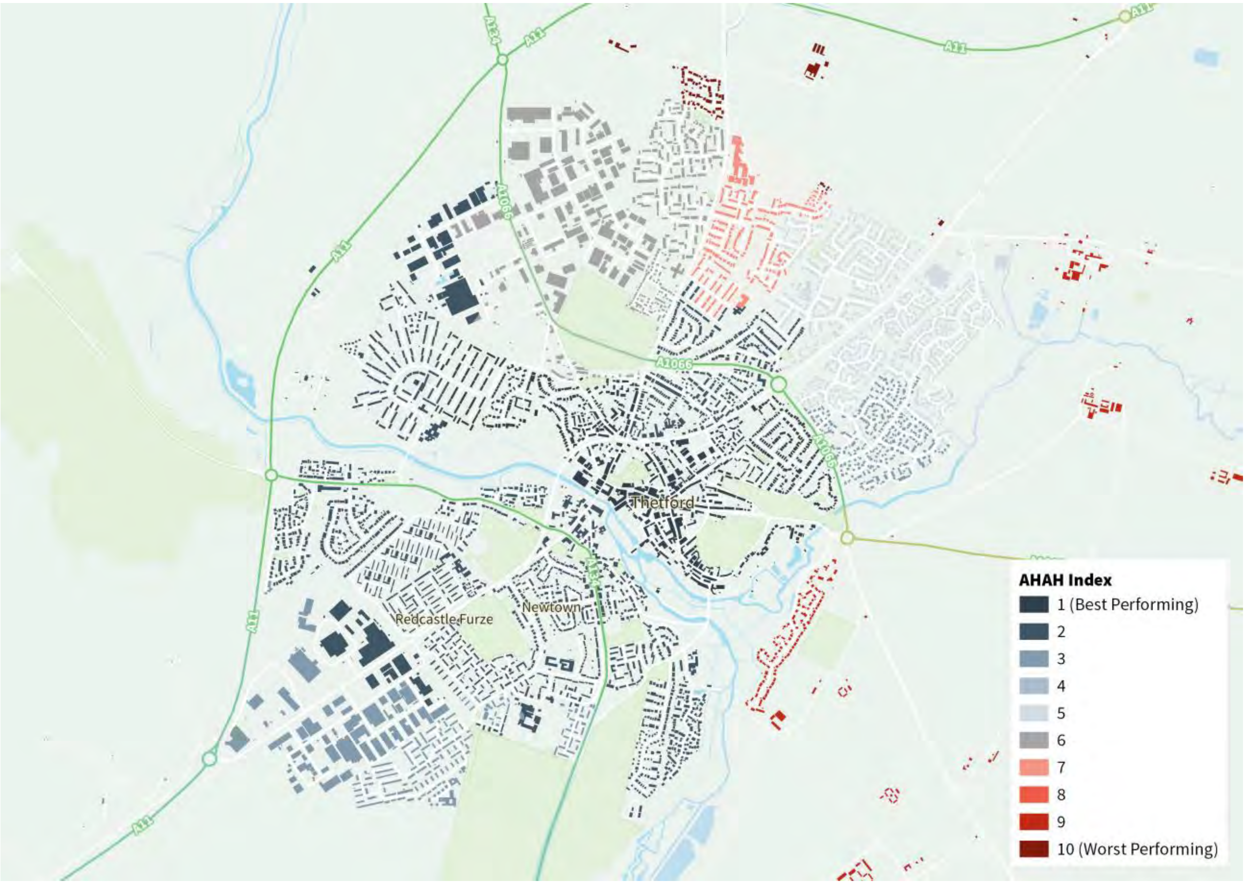
Thetford's overall performance on the AHAZ index is very high – indicating a high prevalence of social and health-related infrastructure. Over half of LSOAs are within the top 20% least deprived neighbourhoods nationally. Key to this is access to natural and green infrastructure – such as the river corridor and Thetford Forest.

Access to health infrastructure is the town's worst performing domain. This includes access to GPs, hospitals, pharmacies, dentists, and leisure services. It is important that wider health and social infrastructure provision is considered as part of the ongoing growth of the town.

Access to Health Assets and Hazards Index in Thetford



Access to Health Assets and Hazards Index by neighbourhood



Source: Access to Healthy Assets and Hazards

Thetford: **Observational analysis**

Culture, Community and Leisure Assets

The map clearly shows Thetford's impressive number of school close to the town centre. It also demonstrates the clustering of community and cultural uses around the old market square. Thetford has a good set of cultural uses for a town of it size, including a cinema and three museums.

Key

- Culture
- Health and Leisure
- Education
- Community Space
- Religious
- Medical and care services

Culture

C1. Railway Tavern Pub
C2. Charles Burrell Museum
C3. Ancient House Museum
C4. The Bell Hotel Pub
C5. The Light Cinema
C6. Carnegie
C7. Dad's Army Museum
C8. Red Lion Pub
C9. Green Dragon Pub
C10. The Black Horse Pub
C11. The Albion Pub

Health and Leisure

H1. Thetford Town Football Club and Cricket Club
H2. Breckland Leisure Centre and Waterworld
H3. Winners Bingo

Education

E1. Thetford Drake Primary School and Nursery
E2. Admirals Academy
E3. The Bishops CE Primary Academy
E4. Norwich Road Academy
E5. Thetford Grammar School
E6. Redcastle Family School
E7. Queensway Infant Academy and Nursery
E8. Diamond Academy

Community Space

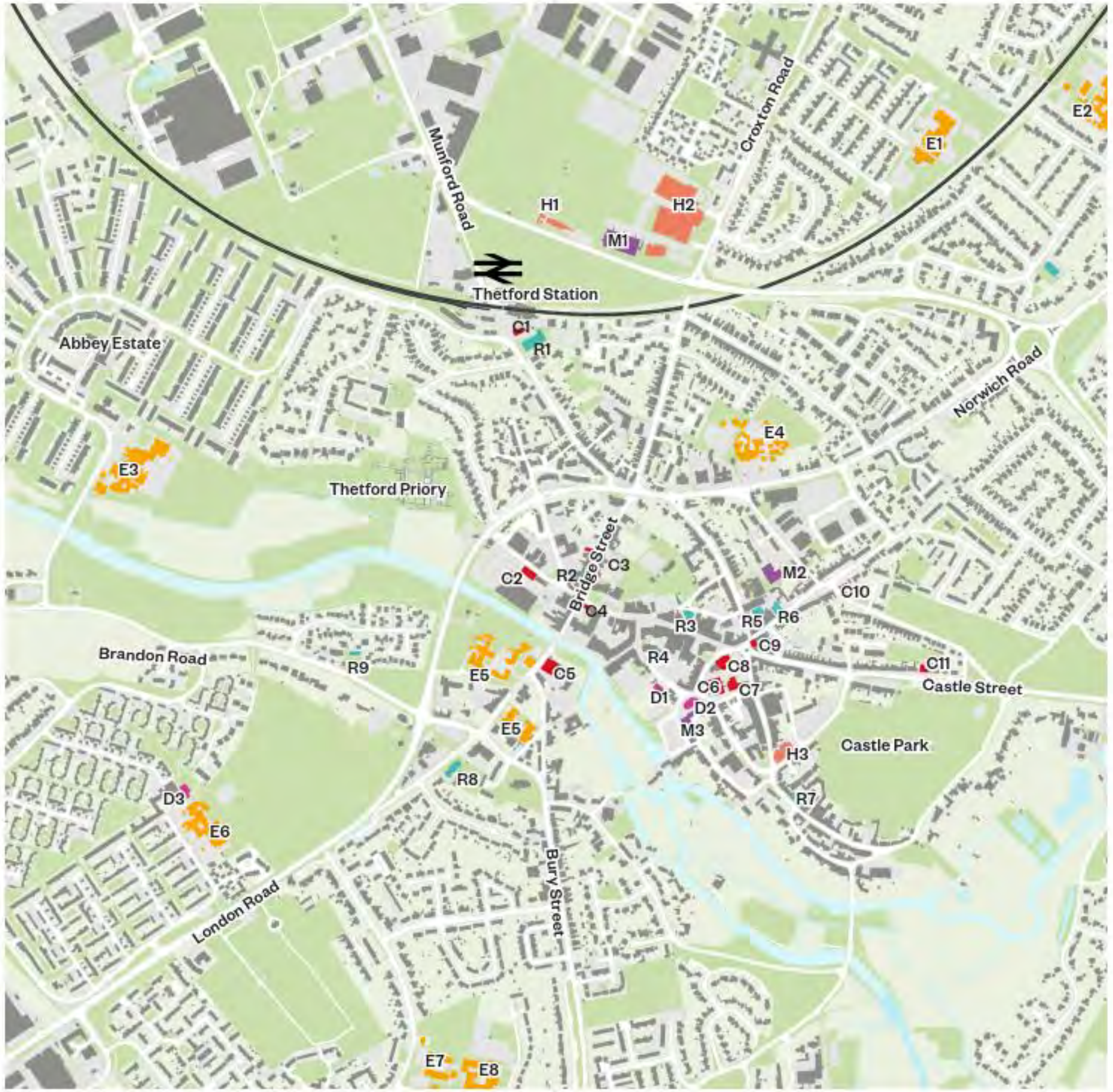
D1. The Crossing (Access Community Trust)
D2. Thetford Library
D3. Redcastle Furze Community Centre

Religious

R1. Church of Jesus Christ of the Latter-day Saints
R2. St Peter's Church
R3. King's Street Baptist Church
R4. Thetford Methodist Church
R5. Thetford United Reformed Church
R6. Salvation Army
R7. Chapel of Rest
R8. St Mary's Catholic Church
R9. Church of the Holy Sepulchre

Medical and Care Services

M1. Anglia Community Eye Care
M2. Grove Surgery
M3. School Lane Surgery



Heritage Assets and Conservation Zones

Thetford's impressive architecture is reflected in the concentration of listed buildings in the conservation area. The town boasts examples of Tudor architecture and proximity to heritage assets dating back 1000 years.

Several Scheduled Ancient Monument sites can be found throughout Thetford, including Thetford Castle Mound and the Priory of St Mary. This creates a buffer of undeveloped areas circling the town centre. The immediate area surrounding Thetford is also home to heritage assets such as Thetford Warren Lodge.

Key

- Notable heritage assets
- Listed buildings
- Conservation area
- Special conservation area
- Scheduled Ancient Monuments
- Primary shopfronts (Local Plan)
- Secondary shopfronts (Local Plan)

N

0 500m

Notable Heritage Assets

H1. Thetford Priory
H2. Ancient House Museum
H3. Church
H4. Thetford Castle Mound
H5. Church of the Holy Sepulcre
H6. Thetford Warren Lodge

Denominations of Open Space

The adjacent map reveals the ample open space that runs along the Little Ouse River and the cluster of green space in the town centre.

The proximity to Thetford Forest Park and Go Ape to the west is great asset to the town, as well as the nearby Centre Parcs. These sites are popular tourist attractions and offer important local employment, particularly entry level jobs for local young people.

Key

- Open space (local plan denomination)
- National forest parks
- Green space
- Town centre boundary

N

0 500m

Local Assets, Heritage and Uses

Architectural Features

Riverside Walk along Little Ouse River

Market Square

Carnegie Hall and hard-standing public realm

Charles Burrell Museum

Guildhall and Carnegie Hall

Architectural Features

Breckland House

Pedestrianised King Street

Riverside development

Attractive local vernacular and flint stone architecture

Unusual architecture and extensions between Ford Street and Nuns' Bridges Road

Thetford Station

Vacant sites

The Town Centre has a large number of vacant units and low footfall, particularly along Kings Street and concentrated most densely at the Riverside Parade.

There has been a growing number of premises that have been vacant long term. Significant vacant assets such as the station building could be contributing to perceptions of decline.

Riverside Walk

Riverside Walk

Thetford Station - the Grade II listed control house – a key architectural asset – lies vacant

King Street

Public Transport and Active Travel

Buses connect Thetford to Attleborough, Norwich and Brandon, though services only run every few hours. Buses around the town, T1 and T2, run more regularly. Bury St Edmunds is a 30 minute bus ride away.

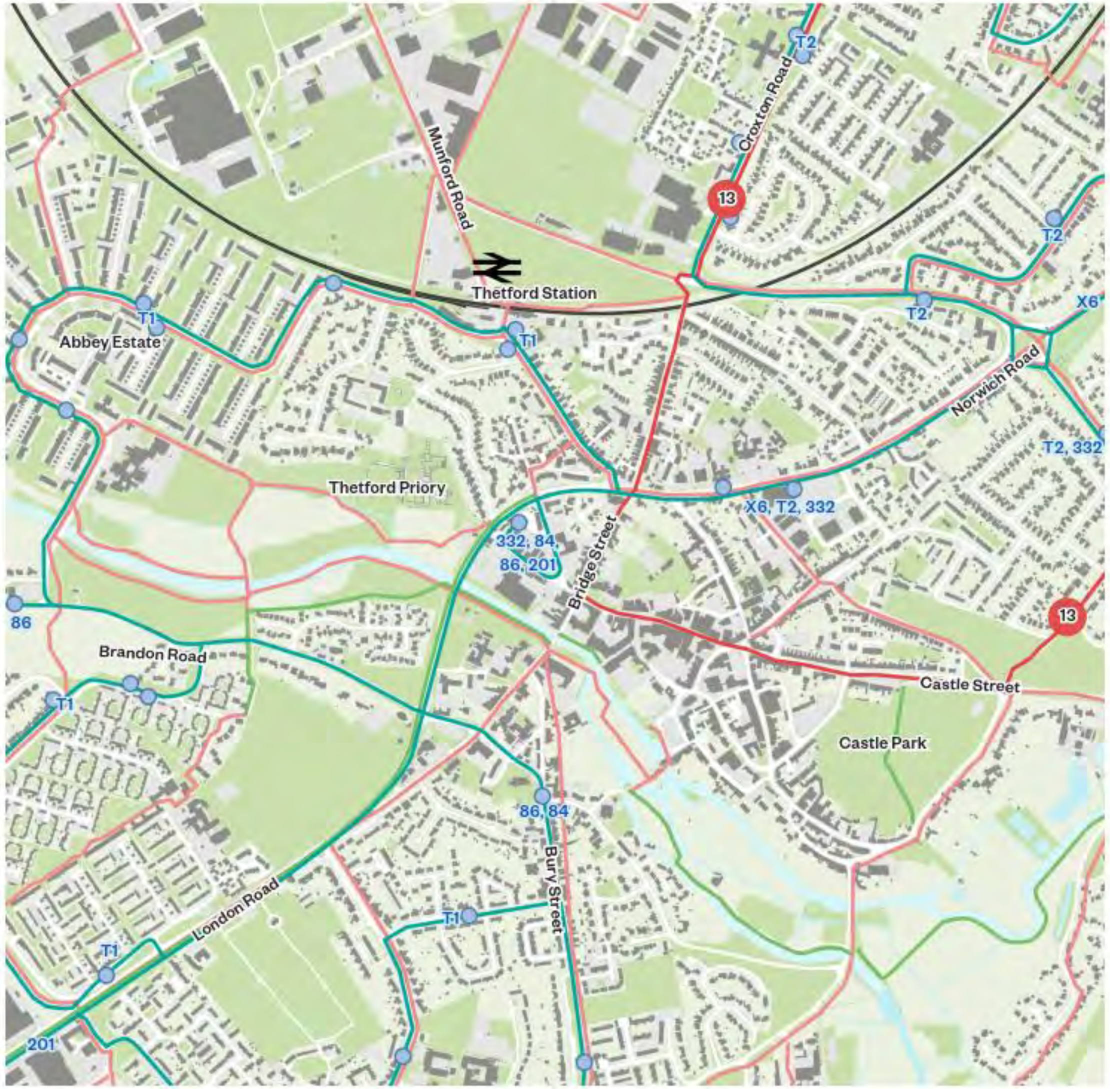
Some segregated cycle routes provide safe space for cyclists, and the Cycling and Walking Network proposed in the Area Action Plan will greatly improve active travel as an option if quality measures are delivered.

Key

- Bus routes
- Bus stops
- Existing National Cycle Route 13
- Cycle Network from Thetford Area Action Plan
- Bridleway or segregated cycle path
- Footway

N

0 250m



Wider Cycling and Walking Infrastructure

Thetford forms a destination point on the St. Edmund Way, a pilgrimage route from Manningtree to Brandon which follows the course of the river past Thetford Priory. Improvements to connections along the river suggested in the River Little Ouse Waterspace Study would greatly increase use of these routes and access to Thetford Forest. Thetford is served by the NCN route 13, connecting it to the Norfolk Coast, via Watton. The Area Action Plan sets out a plan for Thetford Loops. Phase 1 could offer a quick-win opportunity for the Delivery Plan. The A11 is an important major road and strategic connection but creates great severance to the forest and Centre Parcs

Key

- St. Edmund Way
- National Cycle Network (NCN) 13
- Proposed improved connections (River Little Ouse Waterspace Study)
- Proposed new bridge (River Little Ouse Waterspace Study)
- Proposed cycling routes (Thetford Loops - Adopted Area Action Plan)

N

0 500m

Perceptive Study of Public Realm

1. TC have applied to NCC for new pedestrian bridge (across the river at Thetford Garden Centre connecting to Arlington Way Path).
2. Poor connectivity between Abbey Meadows and town centre (with the route passing the sub-station).
3. Jetty is important access point to the river (eg via kayak).
4. Poor pedestrian connectivity (lack of pavement and crossing points) between Nun's Bridge Road and Spring Walk (riverside route). HGV's have also been re-routed along this route to relieve traffic in the town centre, but this has increased the risk of the pedestrian function of this road.
5. Access from Kings Fleet into Forest is desirable.
6. Explore potential of opening up the right of way at back of M&Co to King Street.
7. Routes from Abbey Estate to station very difficult and lorries get stuck under Bridge.
8. Poor legibility and wayfinding once alighting at Thetford Station.
9. Limited accessibility at Thetford Station. No disabled access between platforms or to north platform.
10. Narrow pavements along Bridge Street limit accessible movement.
11. Neglected area of hard-standing public realm adjacent to Bell Hotel.
12. Bridge Street is an important navigation point and potential area to focus wayfinding efforts.
13. Route to Thetford Castle Mound.
14. Town Council are planning to improve amenity space at Lady Gentle Meadow.
15. Third gateway to the forest (identified in the Levitt Bernstein study) is currently under performing.
16. Poor connectivity between station and industrial estate.
17. Car parks dominate eastern edge of the river.
18. Suspension of parking (in Market Square) on market days allows adjacent activities to activate the public realm.
19. Pedestrianised areas are connected and serviced by generous footpaths and provide breathing space away from vehicles.

Key

- Pedestrianised areas and significant public realm
- Parking (approx 585 spaces provided by Breckland free parking)
- Shared surface/ limited vehicular access
- Main vehicular flow
- Pedestrian routes and cut-throughs
- Poor pedestrian connectivity
- Potential pedestrian routes
- Cycle routes
- Connections to the surrounding area/wider walking & cycling routes

N

0 50m

2.4

Town Deep-Dive: Watton

Watton's economic **history**

16th century Watton

In the 16th and 17th Century, crafts, trades and businesses flourished in Watton including, butchers, bakers, brewers, shoemakers, blacksmiths, wheelwrights, saddlers and coopers.

However, the manufacture of woolen cloth was the town's most important industry. The wealth this generated paid for the town's most distinctive landmark – the clock tower. This was funded by Christopher Hey who was one of the town's most successful mercers.

1

Home to the Royal Air Force

The opening of the RAF base at Watton in 1936 represented a momentous milestone in the town's development and economic history. This provided significant employment opportunities for the town's agricultural workforce who helped with the base's construction. The base was integral for RAF operations in WWII.

2

Rail linking Watton to the wider district

One of the most important events in the history of Watton was the opening of the Thetford to Watton railway line on 18th October 1869 by the Thetford and Watton railway Company. Six years later the line was extended to Swaffham. It closed for passengers in 1964 and freight in 1965 as part of the Beeching Axe.

The site of the old station has subsequently attracted several small industrial developments which are vital to the local economy.

3

Housing growth for a 21st century market town

Between 2001 to 2014 around 515 new homes were built in the town. Another 500 could be built if all applications to Breckland Council are approved.

New residents can help to enhance the vibrancy and viability of the high street which has seen vacancies increase significantly in recent years.

4

Source: RAF Watton, History of Watton.Org

Local **policy review**

Over the planning period, Watton is expected to accommodate at least:

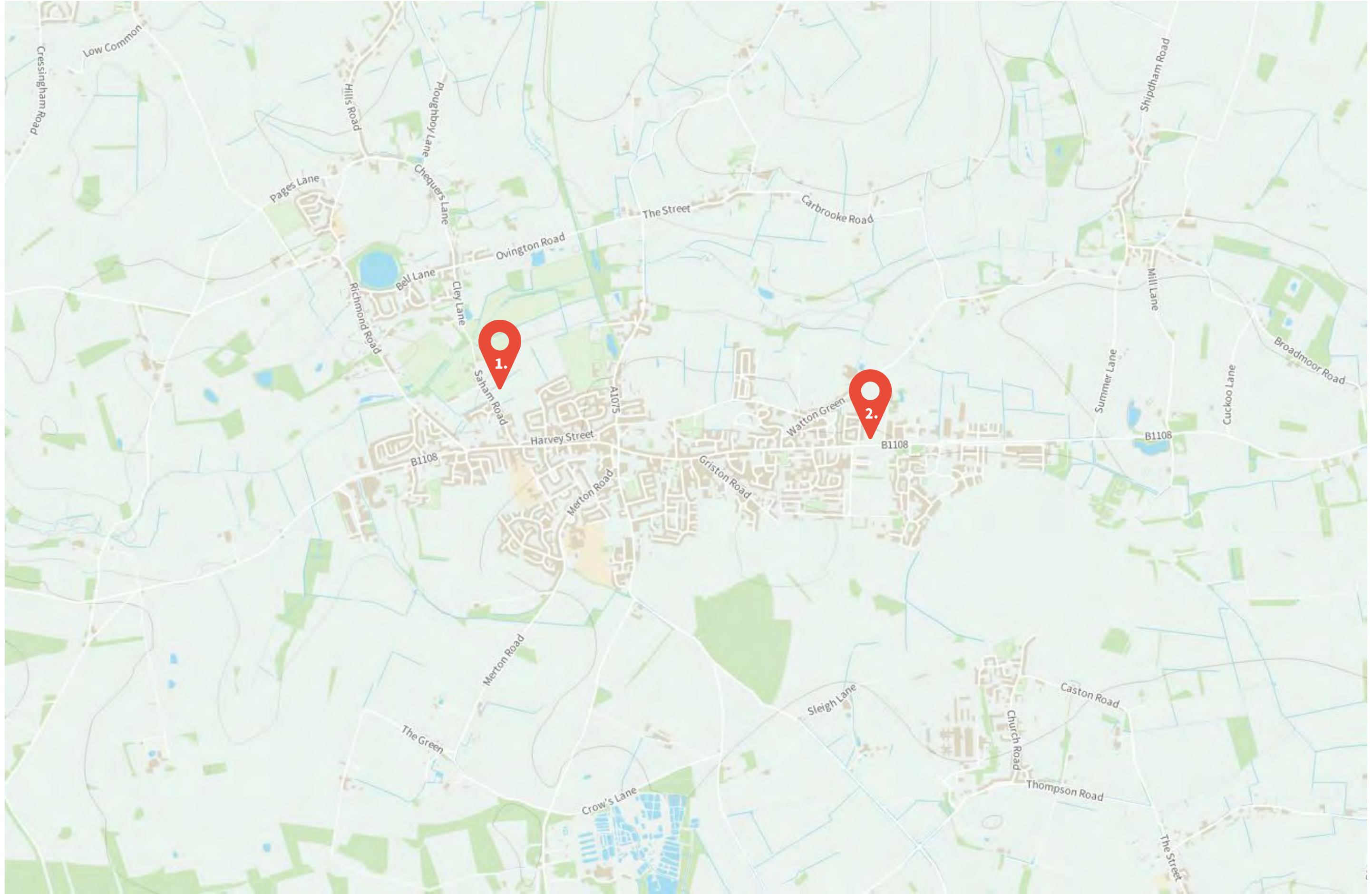
1,636 new homes

To deliver this, key sites include:

1. **Saham Road:** 160 dwellings

2. **Norwich Road:** 45 dwellings/60 bed care home

Watton's key development sites and Local Plan allocations



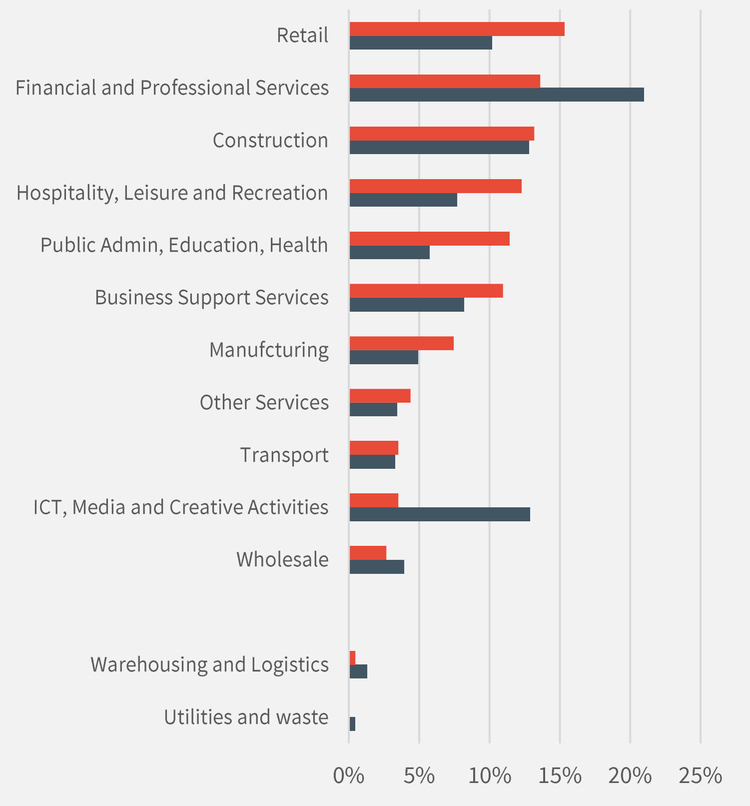
Source: Breckland Local Plan

Economic **Function**

Watton's businesses

Watton is home to around 230 businesses.

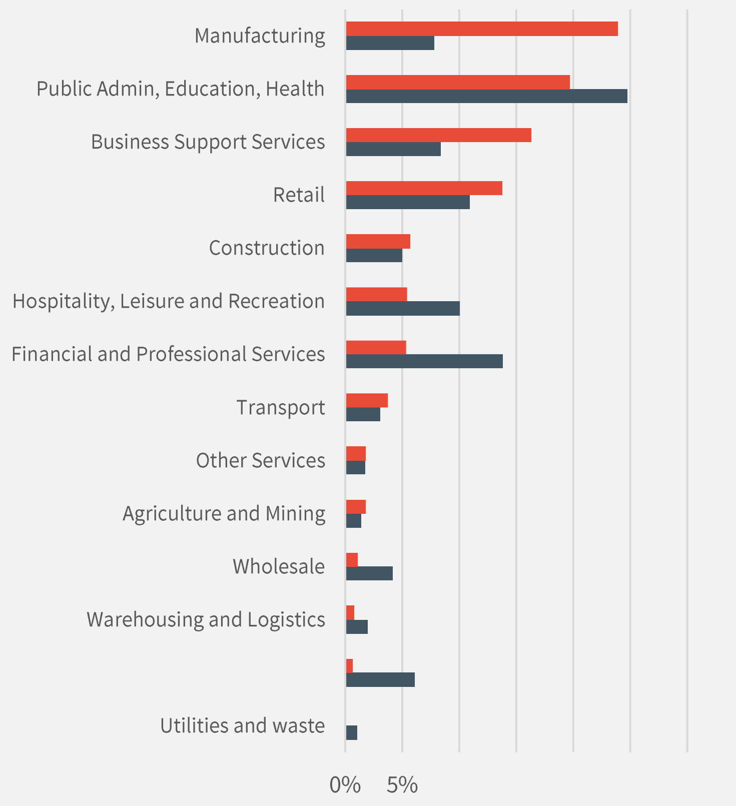
1



Watton's jobs

There are around 2,600 jobs in Watton.

2

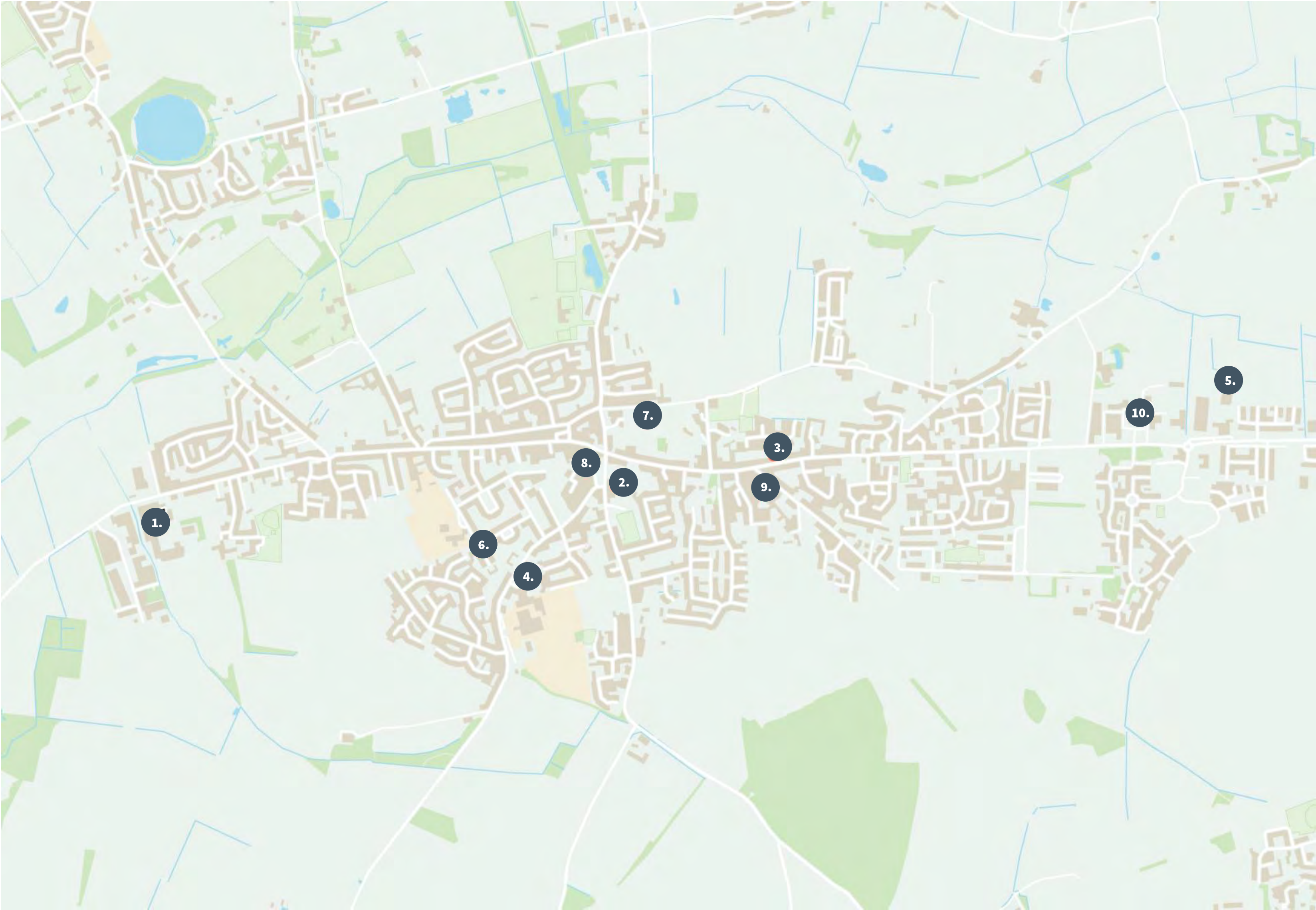


Watton's economy:

- Watton's business base has increased by 13% since 2010
- Some of Watton's largest sectors by number of businesses include Retail (15% of total businesses), Financial and Professional Services (13%) and Construction (13%).
- There are around 2,600 jobs in Watton, with jobs increasing by 11% since 2014
- Watton's largest employment sectors are Manufacturing (24% of total employment), Public Administration, Education and Health (20%), and Business Support Services (16%).
- Higher levels of businesses and employment within Retail than is seen nationally means that Watton has likely been more exposed to the impacts of COVID-19 than other places.
- High levels of employment within Public Admin, Education and Health and Business Support Services in Watton may enable the town to withstand some of the economic impacts of COVID-19 through increased demand for work within these sectors.

Source: IDBR, BRES, and UK Business Count. Analysis of Watton's economy draws on the ONS Inter-Departmental Business Register to provide a more granular understanding of the local economy, whilst statistics for England draw on the Business Register and Employment Survey and UK Business Count data sources, also from the ONS.

Watton's **major employers**



Using the Inter-Departmental Business Register, Watton's top 10 largest businesses by number of employees have been mapped across the town.

The analysis has excluded businesses which have their registered address in Watton, but do not have employees based on site. Typically, this includes recruitment agencies or cleaning businesses which are registered to a residential address.

The types of businesses shown here reinforces Watton's role as a local service centre – with many of the largest employers providing public services (such as GPs, social care, and schools)

Top 10 largest employers

1. Cranswick Country Foods (Norfolk) – 509 employees
2. Tesco Stores Ltd - 128 employees
3. Mr S Dorrington (Dorrington House Watton) – 62 employees
4. Norfolk Academies – 60 employees
5. Wincanton Plc – 56 employees
6. Corvus Education Trust – 56 employees
7. Norse Care Services Limited – 48 employees
8. Watton Medical Practice – 33 employees
9. VPH Roofing & Scaffolding Ltd – 40 employees
10. Barnies Foods Ltd – 38 employees

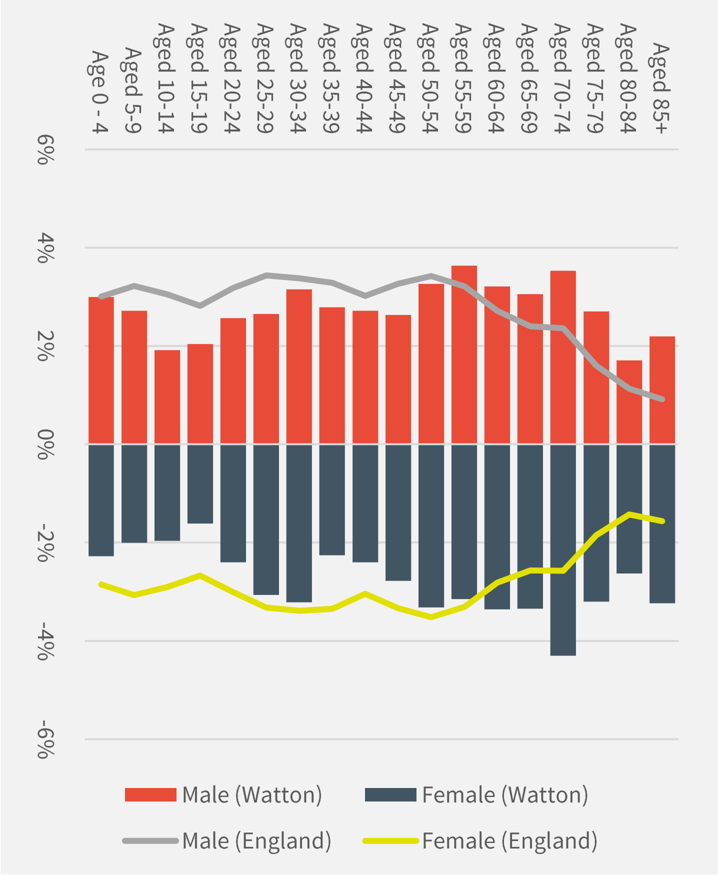
Source: IDBR

People: **labour market characteristics**

Watton's demographics

Watton has a significant ageing population with 30% of its residents aged 65 or over

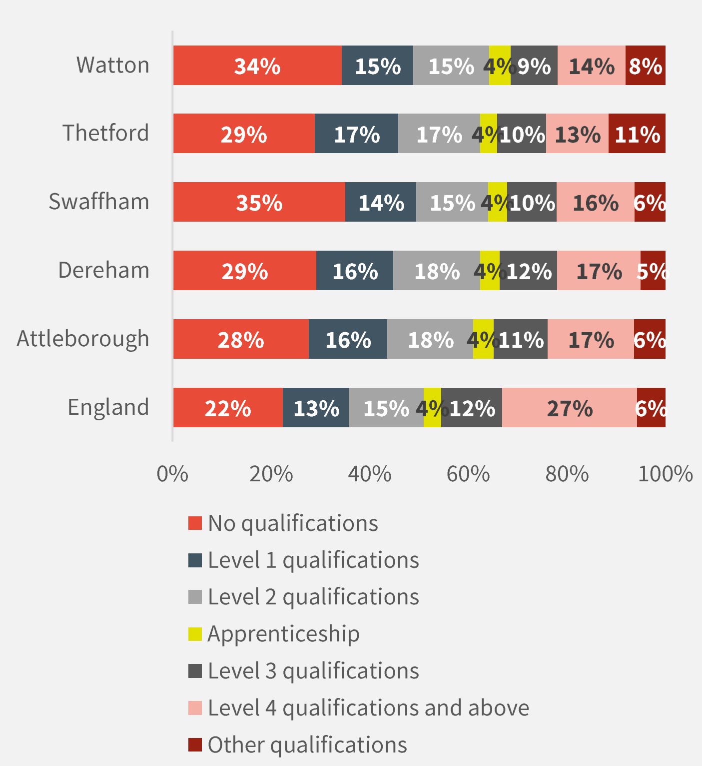
1



Watton's skills + employment

Qualification levels are predominantly low and mid level, with only 14% holding level 4 in 2011

2

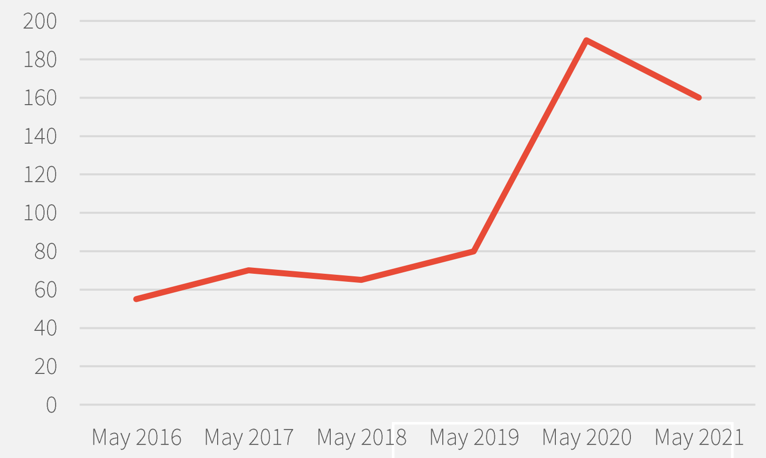


Note: 2011 Census provides latest picture of qualification levels across at a town-level. This data cannot be directly compared to other datasets such as the Annual Population Survey, as the 2011 Census profiles the entire population whilst other datasets focus on the population aged 16-64.

Watton's people:

- Higher Education participation in Watton is low. Only 17.7% of Watton's young people go to university which is one of the lowest rates of participation of Breckland's market towns.
- Between February 2020 and January 2021, around 600 criminal offences within Dereham accounted for 6% of total incidents across Breckland and 9% of all criminal offences within the District's five market towns.
- The COVID-19 pandemic accelerated an upwards trajectory in the number of benefit claimants living in Watton, with claimant counts increasing by 192% between May 2018 and May 2020.

Watton claimant count, 2016-2021



Place: **Watton's vitality**

Watton's vitality

Watton's deprivation challenges most acutely affect the town centre.

1

Watton's infrastructure

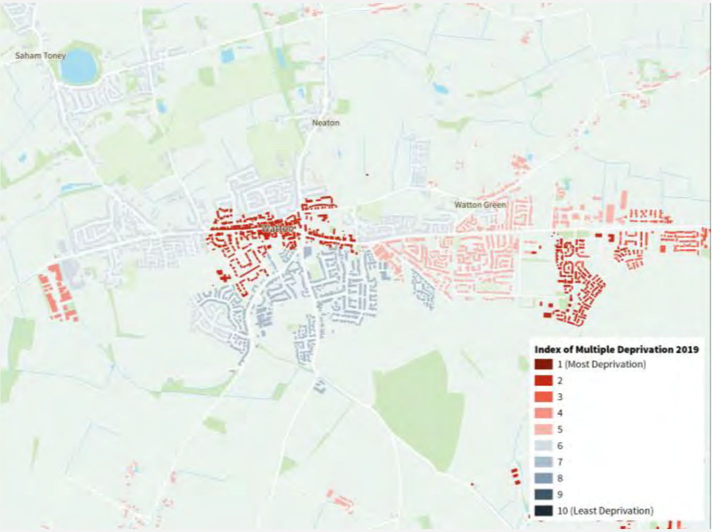
Digital connectivity is average with 96.5% able to access Superfast speeds but only 3% have access to the fastest speeds.

2

Watton's place vitality:

- Watton is a town of deprivation extremes. The most deprived and least deprived LSOAs are adjacent to one another within the town centre.
- Watton has the highest retail vacancy in Breckland. In 2021, this reached a high of 14%.
- Crime in Watton is low. With 73 crimes per 1,000 people, it is the second lowest of any of the market towns.

Index of Multiple Deprivation, 2019



Superfast broadband connectivity, 2020

Watton crime hotspots, 2020

Source: Ministry of Housing, Communities and Local Government; Ofcom.

Watton's **retail vitality (1): Supply**

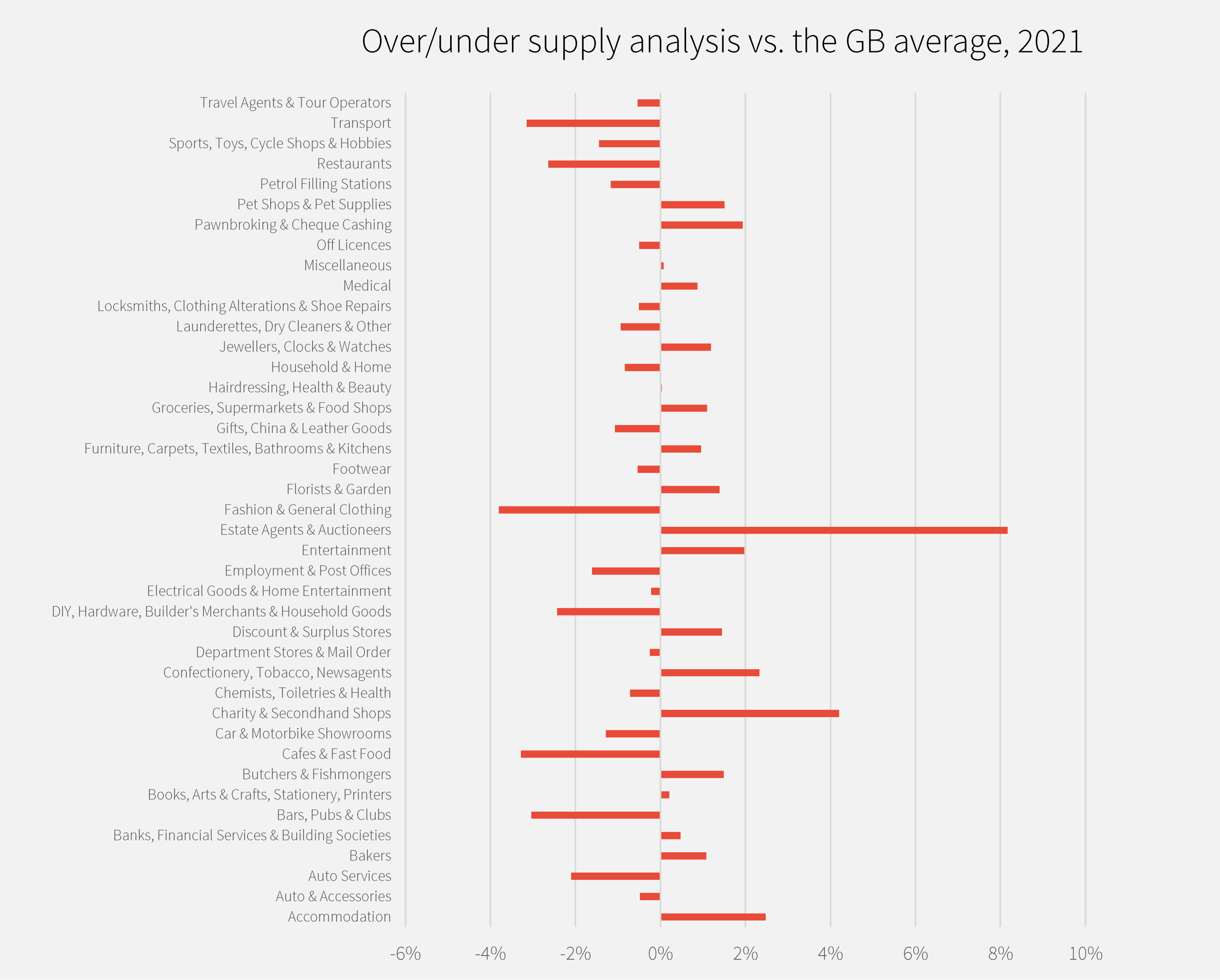
The size of the town means there are significant retail supply discrepancies compared to the national average…

Vacancies across Watton have risen sharply over the last five years and the town's vacancy rate is now the highest in Breckland. In 2021, 14% of retail units were vacant.

Over/undersupply in Watton is exaggerated due to the small number of retail properties in the town. The largest oversupply is in Estate Agents and Auctioneers (+8%). This is followed by charity and second hand shops (+4%).

The largest undersupply categories are within businesses worst affected by original lockdown restrictions. Fashion & General clothing (-4%) is the largest undersupply category, followed by cafes and fast food, transport, restaurants, and bars, pubs and clubs (-3%).

Targeted local support for experiential retail may be required to encourage people back into Watton to build confidence and support worst affected businesses.



Source: Local Data Company

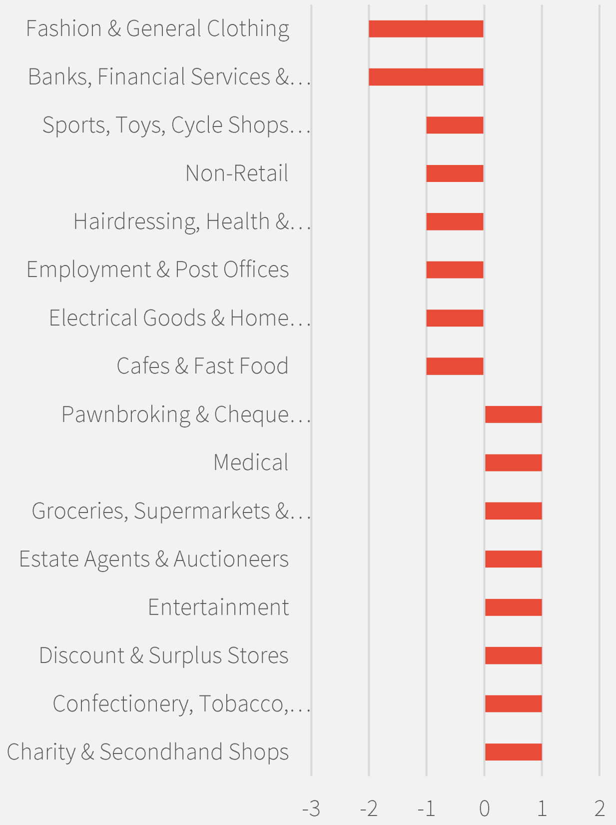
Watton's **retail vitality (2): Change**

Limited movement across all retail categories driving the town's long-term vacancy challenges…

Across all categories, Watton has had a net closure of 2 businesses since 2014. The largest losses have been in fashion and general clothing and banks/financial services (2 net losses). This has included the loss of the Lloyds bank from the high street in 2018 and the Norwich and Peterborough Building Society in 2017.

The extent of openings have been limited, equating to a net gain of 1 across a broad range of shops and services. This is reinforced by the fact that Watton has the highest persistent vacancies across the five market towns. 7% of retail units across Watton have been vacant for 3+ years. The Town Delivery Plans should propose alternative uses for these spaces which is aligned with Watton's size and role as a local service centre.

Largest net increase/decrease by category, 2014/15-2020/21



Source: Local Data Company

Watton's **commercial property**

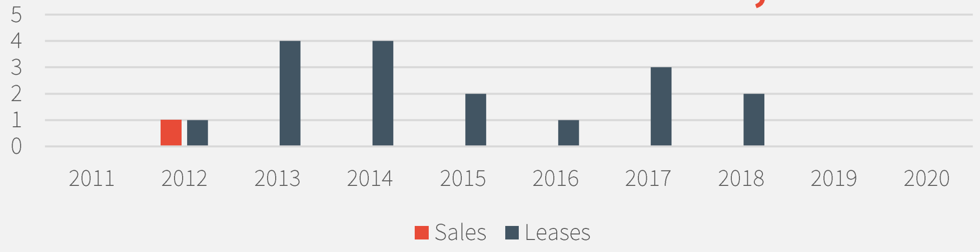
Limited commercial property market dominated by industrial space and defined by low rents…

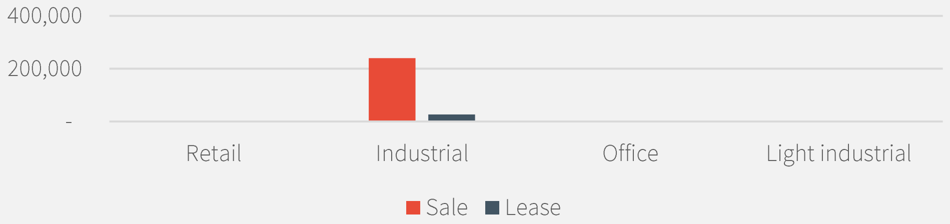
Over 80% of Watton's commercial floorspace is industrial (394,000 sqft). All of this space is recorded as 'Grade C' space, meaning they lack prestige and must depend chiefly on lower price to attract tenants and investors.

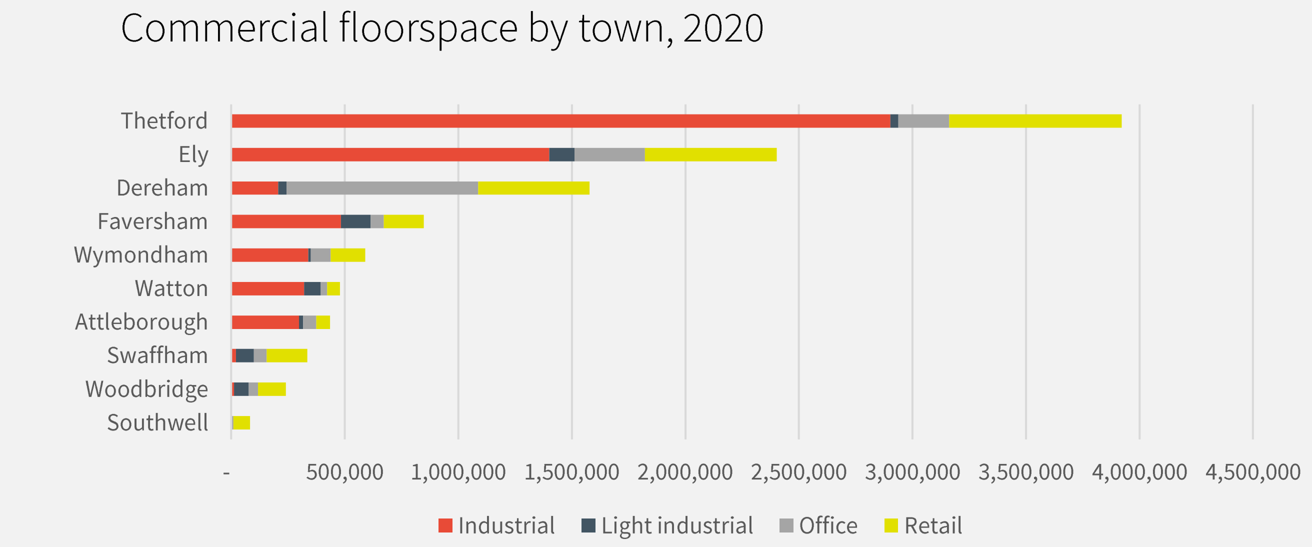
This is reflected by the fact that both office and rental values were the lowest out of any market town reporting a transaction in 2020. Office rents were £5 per square foot which is significantly below comparator towns such as Southwell (£23 per sqft). Similarly, at £6 per sqft, retail rents are amongst the lowest in the country.

These low values are likely to be deterring investment in the town and is evidenced by the fact that there has only been a single commercial sale in Watton since 2011.

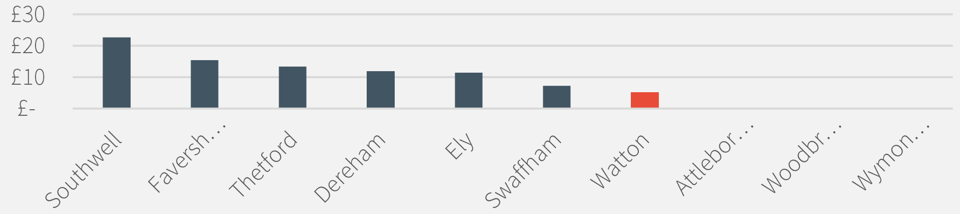
Commercial transactions, 2011-2020

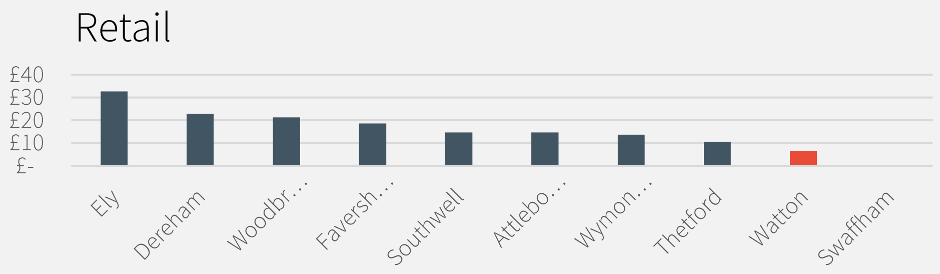






Rental value per sq ft, 2020





Source: Costar

Watton's **accessibility (1)**

Extremely limited public transport catchment…

At the heart of the district, the vast majority of Breckland's residents are within a 45 minute drive of Watton town centre. 93% of Breckland's residents are within a 45 minute driving catchment.

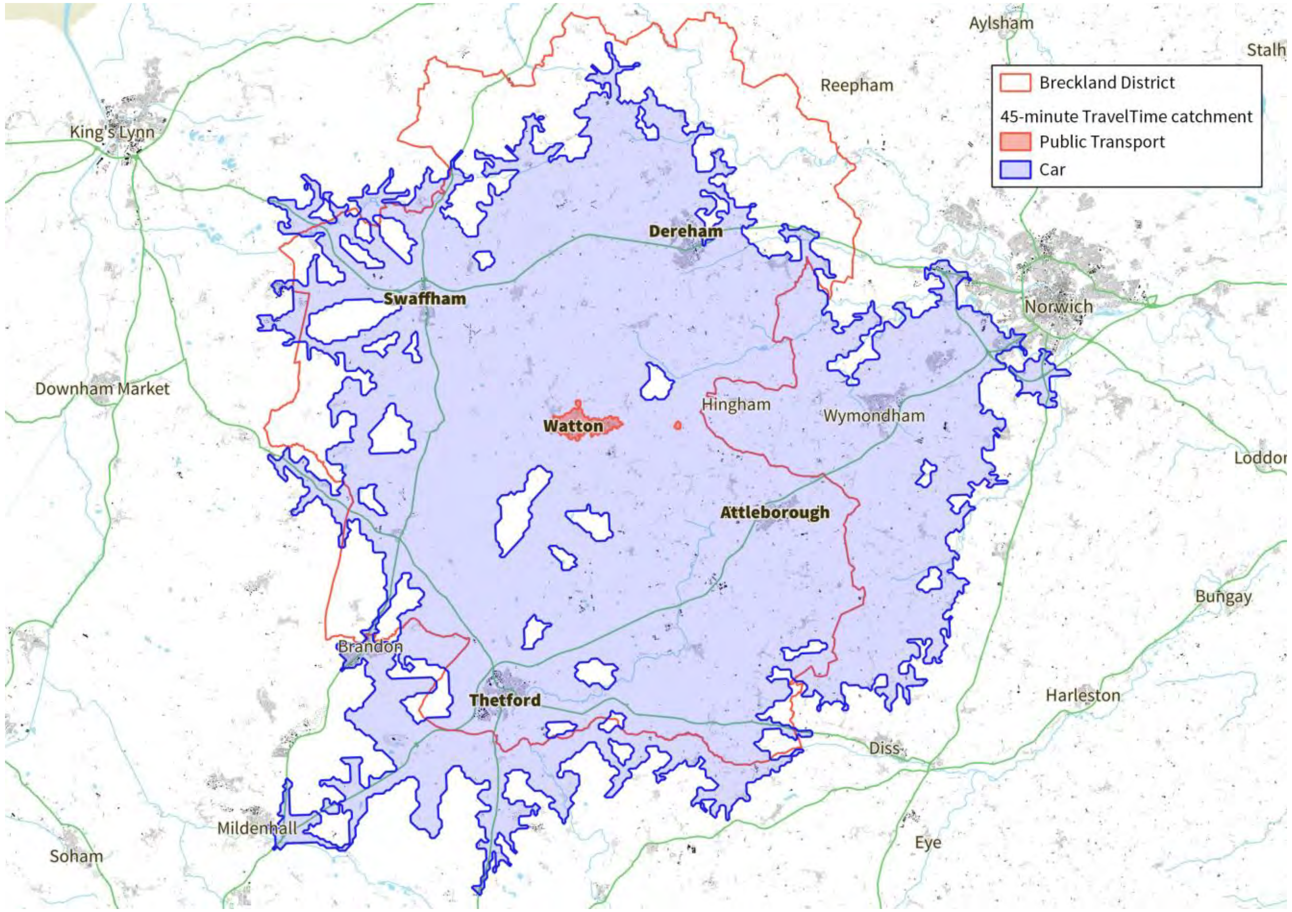
Despite this, public transport connectivity is limited, with only 8,000 people able to reach the town centre within the same time period. However, the connectivity is heavily dependent on the time of day as rural bus services include:

- Watton to Norwich (stopping at Carbrooke, Hingham, University of East Anglia and Norwich)
- Swaffham to Dereham – Stopping at Watton and Shipham
- Watton to Thetford – Stopping at Griston, Caston, Great Hockham, East Wretham, and Croxton

Watton's catchment population by mode of travel

45-minute catchment	Total catchment population	Proportion of Breckland's residents
Public Transport	8,000	6%
Car	218,000	93%

Watton's 45-minute travel time catchments by car and public transport



Source: iGeolise, ONS Mid Year Population Estimates

Watton's **accessibility (2)**

Significant increase in daily traffic through Watton…

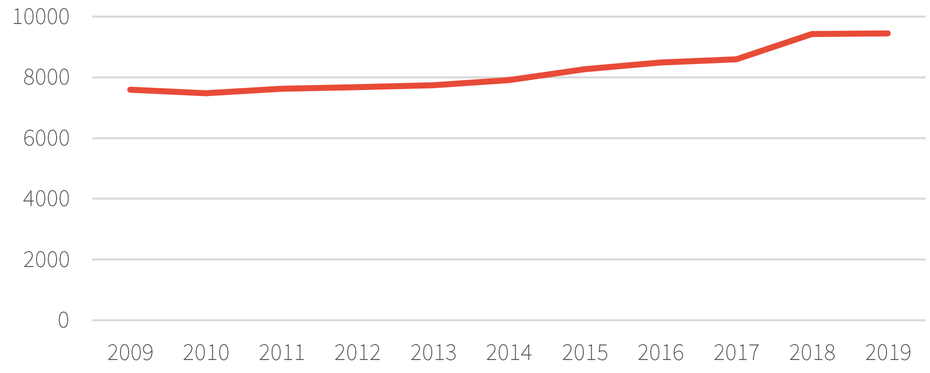
The graph on the right uses the Department for Transport's Traffic Count data which provides street-level data for every junction-to-junction link on the motorway and 'A' road network.

The graph shows that in 2019 the average number of vehicles using the A1075 at Watton was 9,451 every day. Vehicle numbers have gradually increased since 2009, indicating that the town is becoming more congested.

The A1075 is a key road linking Watton with surrounding villages to the south of the district.

Traffic counts within Watton's town centre reinforces a picture of car reliance and limited active transport uptake. For example, buses and coaches only accounted for 0.3% of vehicles, and pedal cycles accounted for 0.2% of vehicles. Meanwhile, private cars and taxis accounted for 77.4% of vehicles. Additionally, there is a high proportion of LGV vehicles, accounting for 16.8% of all vehicles. Increased congestion could affect Watton's air quality and make it a less attractive environment for cyclists and pedestrians.

Total vehicle count on A1075, 2000-2019



Annual average daily flow by mode – A1075, 2019

Pedal cycle - 16 (0.2%)

Bus/coach - 26 (0.3%)

Motorbike - 142 (1.5%)

LGV – 1,590 (16.8%)

Cars/taxis – 7,314 (77.4%)

HGV - 380 (4%)

Source: DfT Traffic Counts

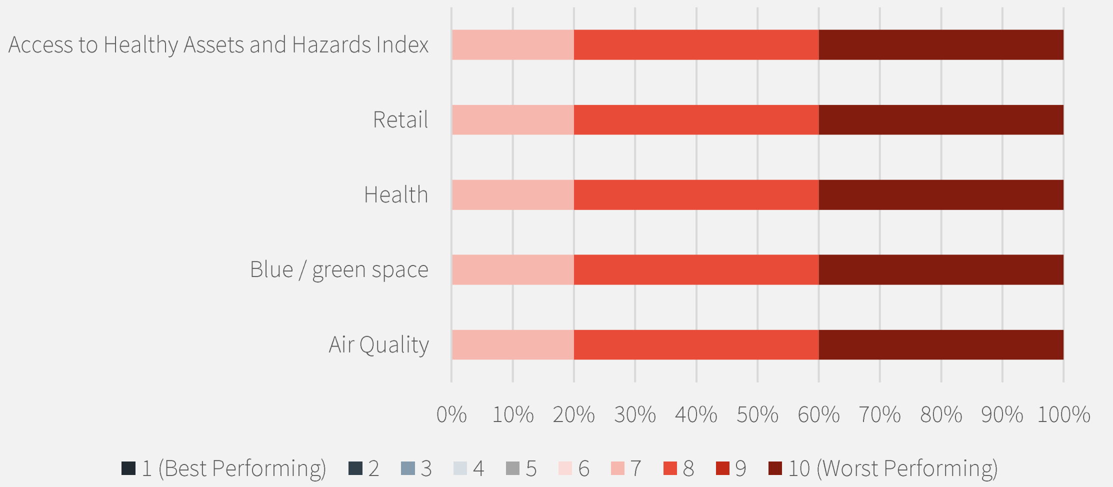
Social **infrastructure and healthy living**

The town is not providing the infrastructure to support healthy lifestyles…

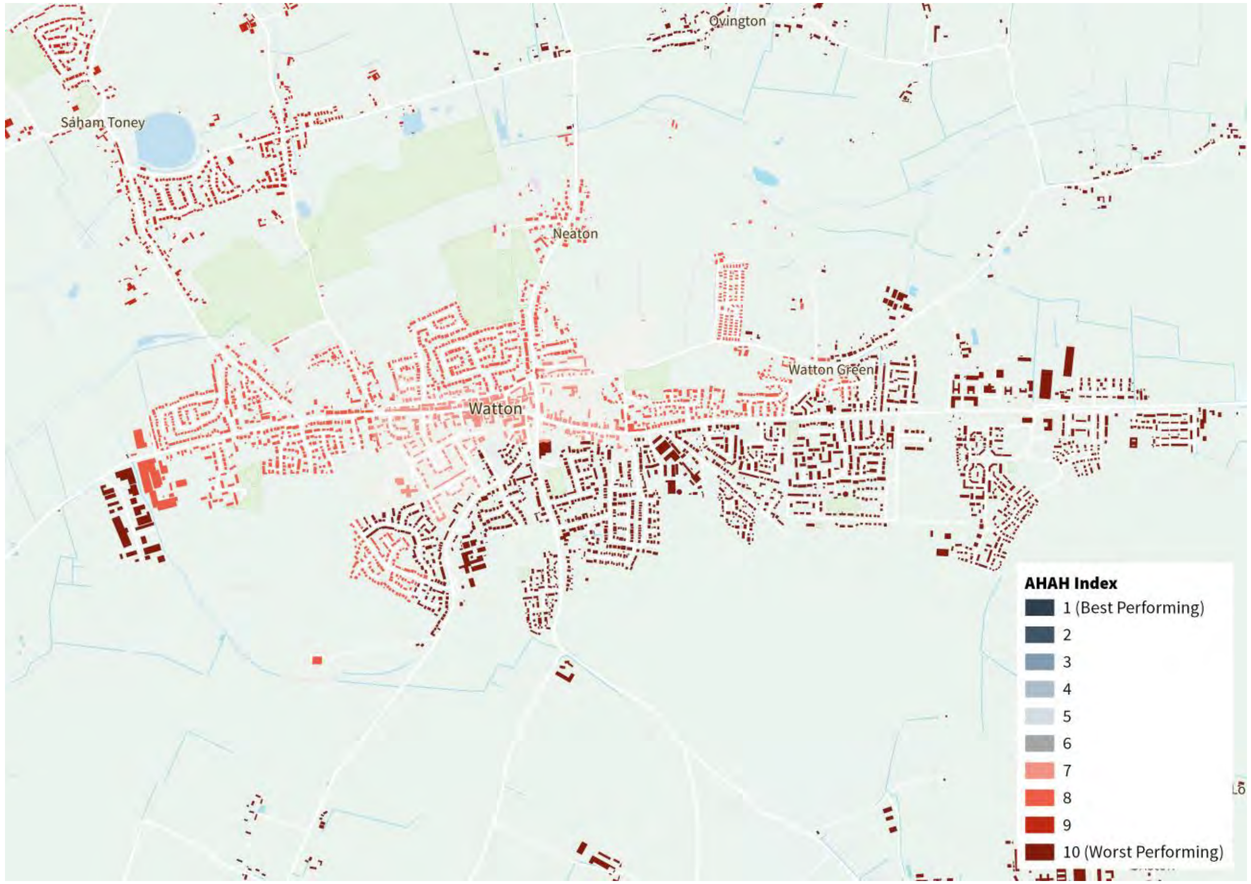
Access to healthy assets in Watton is very poor – with access worst towards the south east of the town. Challenges are present across the board, with 40% of Watton's residents living in the worst performing areas nationally for air quality, access to blue/green space, access to health infrastructure and retail provision.

The data shows that Watton has high levels of air pollution, poor access to parks and green space, a high density of retail outlets that may encourage poor health-related behaviours, and poor access to health services.

Access to Health Assets and Hazards Index in Watton



Access to Health Assets and Hazards Index by neighbourhood

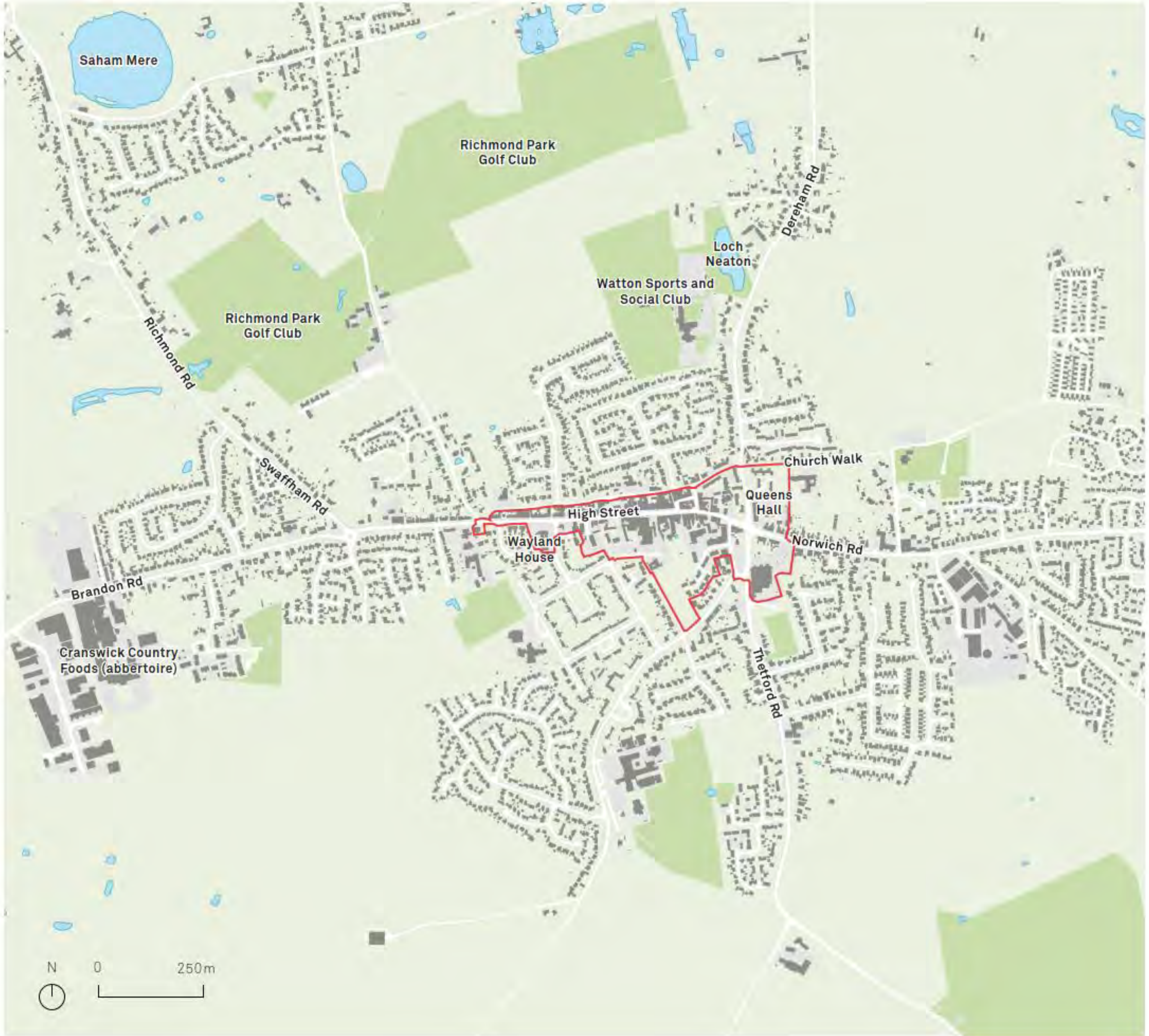


Source: Access to Healthy Assets and Hazards

Watton: **Observational analysis**

1.1
CURRENT POLICY & DEVELOPMENT

Town Centre Boundary



KEY

Town Centre Boundary

1.1 CURRENT POLICY & DEVELOPMENT

Significant Planning Applications

Over recent years, there has not been any major development happening in the town centre area. Sites for residential development coming forward are at the periphery of the town centre. Some of the largest planning applications coming forward are not for sites allocated in the Local Plan.

In recent years, Watton has seen a rise in HMO conversions. The Bull and the heritage site opposite Queen's Hall are two of the latest to be converted.

1. 3PL/2019/0010/F - Erection of 54 dwellings with associated roads, parking, hard & soft landscaping and open space

2. 3PL/2015/0254/O - outline permission for residential development of up to 177 dwellings - applealled

3. 3PL/2018/0952/O - Erection of up to 180 dwellings, the provision of open space and recreational facilities, with site access and associated highways and infrastructure works - permission granted

4. 3PL/2015/1191/O - Residential development of 98 dwellings, open space and play areas - permission granted

Information collected August 2021

5. 0.81ha undeveloped site for new Lidl store; currently in consultation stage

KEY

Planning application - permission granted

Planning application - awaiting decision

1.1 CURRENT POLICY & DEVELOPMENT

Breckland District Council Assets

The adjacent map shows that a number of sites under Breckland District Council (BDC) ownership.

The plot adjacent to Queen's Hall (currently serving as a car park) is owned by BDC and offers a significant opportunity as an anchor to the east end of the High Street.

Sites under Watton Town Council and Norfolk County Council ownership are not mapped. The Library owned by Norfolk County Council adjacent to Wayland House provides an important opportunity for a site that could become a western anchor point to the High Street.

A notable absence from BDC ownership is Watton Sports and Social Club, which is currently owned by a partnership of charities and trusts.

KEY

Breckland District Council (BDC) ownership

1.2 LOCAL ASSETS, HERITAGE & USES

Cultural, Community & Leisure Assets

The adjacent map indicates the diverse offer of Watton's high street. The high street and its immediate environs host the Wednesday market, pubs, community and social infrastructure as well a range of shops from barbers to veterinary practice. The high street is also anchored by the Wayland House (inc. library) and Queen's Hall at either end.

A number of care homes can be found in Watton but there is a lack of further education opportunities or sixth form colleges. The area around Loch Neaton and Watton Sports and Social Club are valuable assets, although both are visibly in need of improvements. The Watton Sports and Social hosts a camping caravan club event annually.

KEY

Culture
C1 The Old Bell Pub
C2 Broom Hall
C3 Dragonfly Gallery (Wayland House)
C4 The Crown Pub
C5 Museum for Watton (Watton Town Hall)
C6 King's Arms Pub
C7 Wednesday Market
C8 Saturday Antiques Fair (Queen's Hall)
C9 Watton Antiques and Collectors' Centre
C10 Watton Salerooms
C11 The Meadows (Wayland Agricultural Show)

Health & leisure
L1 Richmond Park Golf Club
L2 Watton Sports and Social Club
L2a Watton Junior Football Club
L3 Saham Toney Cricket and Watton RFC
L4 Full Fitness Gym and Climbing Centre
L5 The Wonder Wood (children's amusement centre)
L6 Kid's Play (Indoor Play Area)
L7 NR Health and Fitness Club

Education
E1 Watton Junior School
E2 Watton Library
E3 Watton and Westfield Nursery
E4 Wayland Academy

Community Spaces
D1 Men's Shed
D2 Charlotte Harvey Trust: youth & community centre
D3 Wayland House
D4 Watton Town Council
D5 Watton Town Hall
D6 Queen's Hall (Bookable Events Space)
D7 Watton Lodge (Bookable Events Space)
D8 Watton Christian Community Centre
D9 Watton Men's Shed

Religious
R1 Watton Methodist Church
R2 Watton Pentacostal Church and Gallery
R3 St Mary's Parish Church

Medical and Care Services
M1 Conquest Care Homes
M2 Kalmia Mallow (assisted living)
M3 Verve Health - Drug and Alcohol Rehab
M4 Together Watton Dental Care
M5 Watton Health Clinic
M6 Watton Health Practice
M7 Linden Court Residential Care
M8 Dorrington House (assisted living)
M9 Hansell DM Dentist
M10 Lancaster House (assisted living)
M11 Buckingham Lodge Care Home

1.2 LOCAL ASSETS, HERITAGE & USES

Heritage Assets & Conservation Zones

The adjacent map shows that the Conservation Area spans the full length of the high street. It incorporates Harvey Street, running in parallel to the north, and the wedge to the east, containing notable assets such as Willow House. The is, however, a lower concentration of listed buildings within the conservation area than in other market towns.

KEY

Notable Heritage Assets
H1 Church Walk Gates
H2 Watton Methodist Church
H3 Watton Clocktower (museum)
H4 Watton Pentacostal Church and Gallery
H5 St Mary's Parish Church
H6 Willow House

Listed Buildings

Conservation Area

Primary Shopfronts

Secondary Shopfronts

NB: All 'heritage assets' are also listed buildings

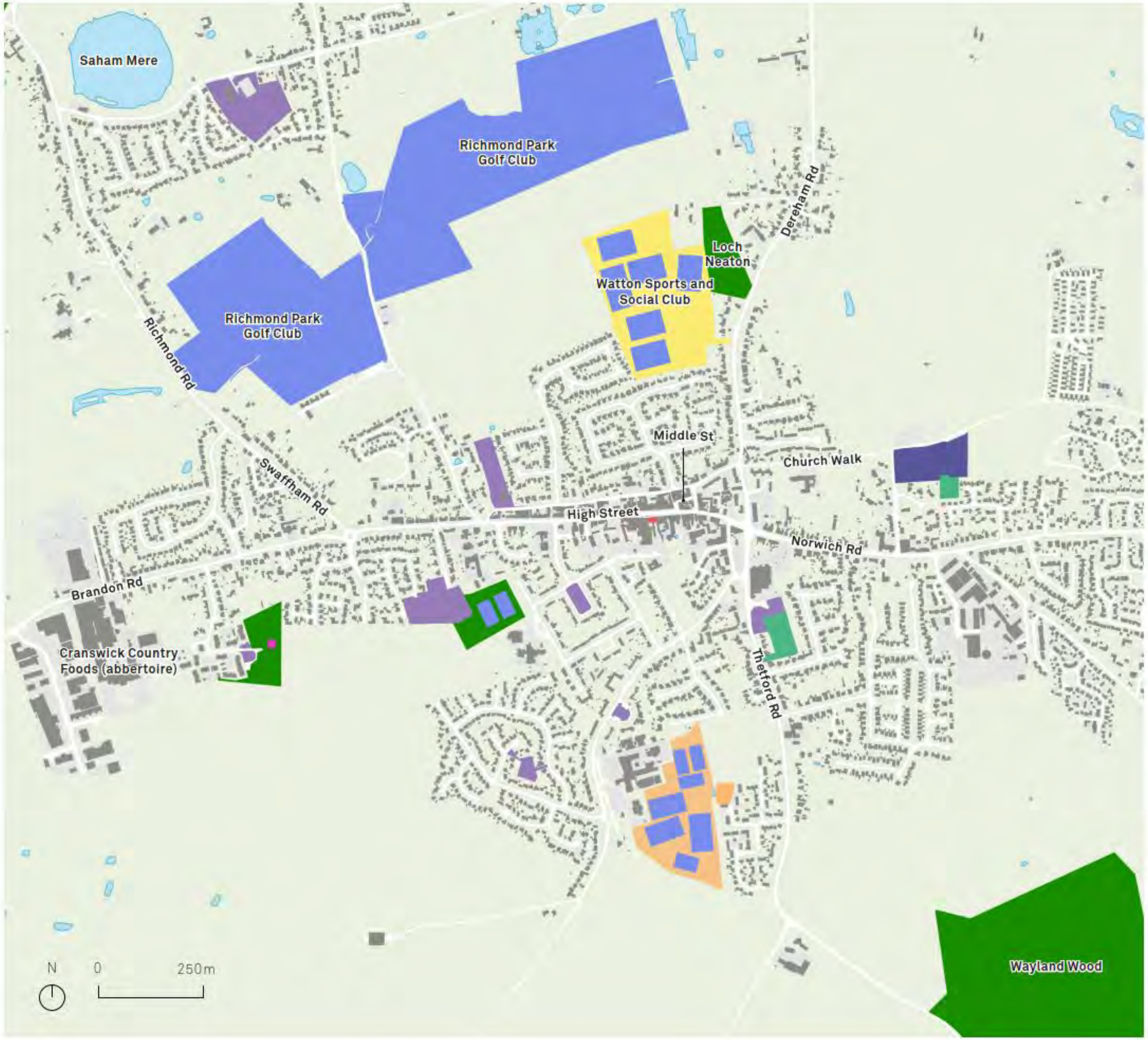
1.2 LOCAL ASSETS, HERITAGE & USES

Denominations of Open Space

The adjacent map highlights that the majority of open space is utilised for sports provision and playing fields.

Loch Neaton is a valuable leisure asset, once used for open-air swimming. Now, unfortunately, it is poorly sign-posted and underused. Recently coffee trucks have occupied the space between the sports centre and Loch Neaton. These have drawn more people.

Wayland Wood, an ancient woodland mentioned in the Domesday Book, and Saham Mere – a glacial lake, residual from the Ice Age – are both short walks from the centre of Watton.



KEY

- Green space (Local Plan denomination)
- Open space (Local Plan denomination)
- Allotments / community growing space
- Religious grounds / cemetery
- Playing fields / recreation grounds
- Sports provision (football pitches, golf courses, basketball & tennis courts)
- School grounds
- Open access play area

1.2
LOCAL ASSETS, HERITAGE & USES

Architectural Features

1.1 The eastern approach to the high street is populated with a number of vacant sites and poorly maintained buildings

1.2 St Mary's Church is a Norman church dated between 1100-1135 and is an important part of the local community. According to the Domesday Book, a church has stood here since 1086

1.3 Pentacostal Church and Gallery

1.4 Watton Clocktower. Grade II listed and dated 1679

1.5 Watton High Street boasts impressive market town architecture and a wide high street

1.6 Queen's Hall, a valuable community asset, is surrounded by railings and a lack of active ground floor frontage which hinders a positive relationship with the street

1.7 Town Hall and museum is a listed building, but could be improved by rethinking how it addresses the market and public realm. The entrance is currently hidden

1.8 The Library, adjacent Wayland House and former Police building are attractive buildings that could be improved and celebrated

1.2
LOCAL ASSETS, HERITAGE & USES

Vacant Sites

Observational analysis has revealed that Watton has substantially more vacant sites than other market towns in Breckland. Crucially, these sites were observed in key locations such as the approaches to the high street.

Watton also hosts the most empty shops in the district, with improvement schemes taking up 10/250 applications across Breckland.

Pictured here are three examples of vacant sites on High Street's eastern end which detract from the visual appeal of arrival into Watton from the East.

1.1 1 High St

1.2 2 High St

1.3 7 High St

1.3
TRANSPORT & MOVEMENT

Public Transport & Active Travel

The adjacent map shows the two bus routes servicing Watton. Crucially, the last bus from Norwich leaves at 1900, removing many opportunities to commute for work or evening activities.

Cycleways provide good services between villages, such as the route into Griston, but not into Watton. The cycle provision is further hampered by large vehicles and agricultural traffic.

Broom Hall is a popular stopping point for those cycling the National Cycle Route 13.

The infrastructure of the old railway cycle route and its connection to Swaffham presents an opportunity for improved connectivity between market towns through active travel.

KEY

- Bus routes
- Bus stops
- Existing National Cycle Route 13
- Local cycleway
- Old railway: potential cycleway project
- Bridleway (usually accesible to cyclists)
- Footway

1.3

TRANSPORT & MOVEMENT

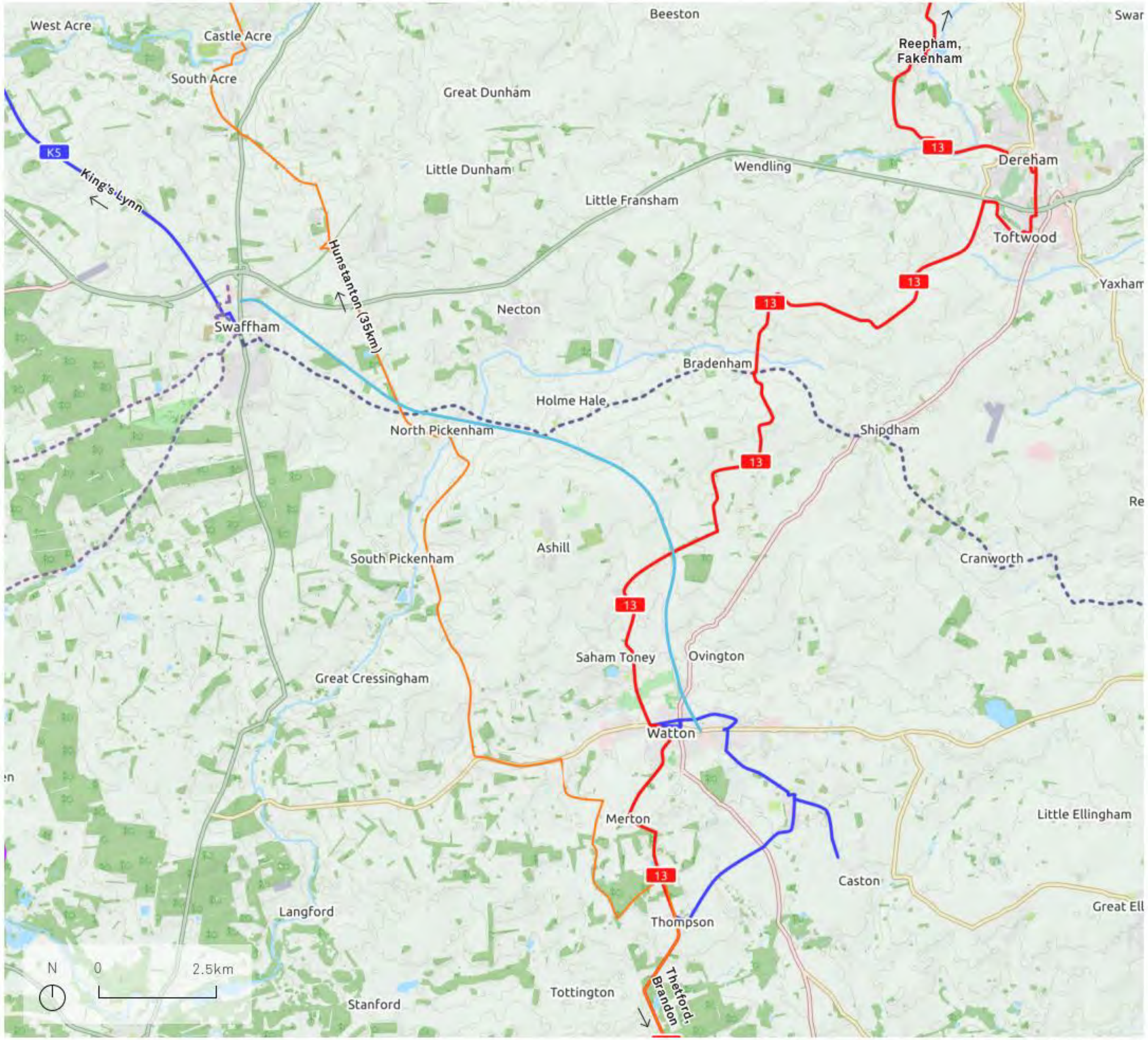
Wider Cycling & Walking Infrastructure

The established infrastructure of wider walking, cycling and leisure routes present unique opportunities to the town delivery plans. There are opportunities to both improve connectivity between towns and to better incorporate the towns into cycleways and walking trails.

Watton is poorly serviced by cycle routes and infrastructure. This could improve peoples' mobility, whilst encouraging greener means of transport.

The Peddar's Way, a long-distance hiking trail, passes close to both Swaffham and Watton. With good signage and improved offer for ramblers, they could be encouraged to use these towns as stopping points.

The EXPERIENCE project by Norfolk County Council will initiate a series of artworks and points of interest along the Peddar's Way which could offer an opportunity to link to Watton.



Source: https://www.openstreetmap.org/#map=12/52.6210/0.7290&layers=C

KEY

- Peddars Way (UK National Trail route)
- National cycleway 13
- Local cycleway
- Old railway: potential cycleway project

1.3 TRANSPORT & MOVEMENT

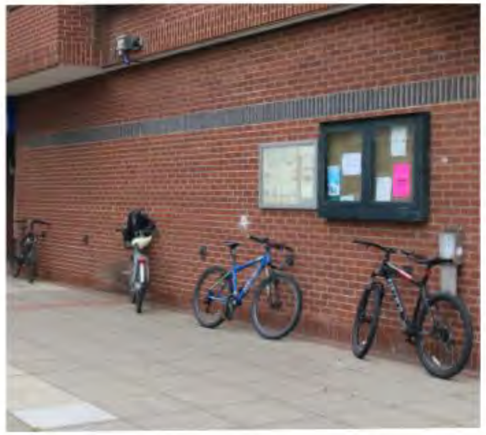
Perceptive Study of Public Realm

1.1 The high street has a limited supply of formal bike racks
1.2 Excessive parking utilises valuable space in the The "widest market town high street in Norfolk" is dominated by a steady flow of traffic and heavy-goods vehicles
1.3 One of two zebra crossings on Watton High Street has an uneven camber that makes crossing precarious for those in mobility scooters and wheelchairs
1.4 During market days, reduced pavements can become congested and force pedestrians closer to the traffic-heavy High Street
1.5 Narrow pavements force pedestrians closer to traffic and make passing others challenging
1.6 The 300 metres between the high street's 2 zebra crossings encourage pedestrians to cross elsewhere
1.7 Cafe tables, passing pedestrians and friends stopping to chat jostle for space on the restricted pavements
1.8 Heavy traffic comes dangerously close to the narrow pavements
2.1 Despite the relative success of the market's transposition, there is limited space for people to gather, whilst vehicles interupt lines of site to market stalls
2.2 The public realm can be generous in some locations, allowing for spill out space and a sociable public realm - improvements to the quality of the public realm would further enhance this
2.3 Church Walk, a handsome thoroughfare connecting the town centre to St Mary's Parish Church, could benefit from lighting in evenings
2.4 Cut-throughs from the high street are narrow, cluttered and poorly lit
2.5 Despite its recent reconfiguration, the road layout between Middle Street and Dereham Road can be tricky to navigate
2.6 The lack of dropped curbs limits accessibility for those using wheelchairs and mobility scooters, and can force them to use the road rather than the pavement
2.7 There is a notable lack of green space, soft landscaping and trees in and around the town centre. Addition of planters help to address this but add clutter to the pavement
2.8 Chastham Place is an important public space pocket but multiple ownership has hampered consolidation. Proximity to Middle Street lends itself to a co-ordinated redesign with a better crossing to the market

KEY

- Pedestrian routes and cut-throughs
- Formal crossings
- Informal crossings (dropped curbs accesible to wheelchair users
- Main course of vehicular traffic
- Bus stop
- Vehicular roadways
- Access only
- Parking
- Town centre boundary

Perceptive Study of Public Realm



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2.7 There is a notable lack of green space, soft landscaping and trees in and around the town centre. Addition of planters help to address this but add clutter to the pavement

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1.4 STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS

Spatial Overview

KEY

Strengths and Opportunities

1. Charlotte Harvey Trust; youth & community centre
2. Watton Sports and Social Club
3. Loch Neaton
4. Chastham Place
5. The Clocktower
6. Middle St. Market
7. Church Walk
8. Queen's Hall car park
9. Watton Library

1.4 STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS

Spatial overview

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7. Queen's Hall car park
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2.5

Town Deep-Dive: Swaffham

Swaffham's economic **history**

Found prosperity in sheep and wool industries

In the 14th and 15th centuries Swaffham had a burgeoning sheep and wool industry.

Today, businesses in Swaffham are predominately comparison retailers, with Local Plan policy stating the town has no further need for convenience shops (day to day shops) but there is a need for comparison shops (such as white goods and clothes) and food and beverage shops (such as cafés).

1

A proud market town

Swaffham has been a market town since the early 13th century. The Butter Cross at the tip of the market place is one of the most prominent features in Swaffham and was built in 1783 by the Earl of Orford to hold a butter mart.

2

Strategically located on the A47

The A47 road which links Great Yarmouth to the midlands runs to the north of the town. This provides good road links to other centres such as Norwich and King's Lynn. The 7 mile part-dual-carriageway East Dereham Bypass built on part of the disused railway line was opened in spring 1978 followed by a five-mile (8 km) part-dual-carriageway Swaffham Bypass.

Until 1968 Swaffham had a railway station on the Great Eastern Railway line from King's Lynn.

3

At the forefront of the UK's clean energy agenda

Swaffham is known for it two onshore Enercon E-66 wind turbines. Together, these generate more than three megawatts of renewable energy.

More recently, these two turbines have been joined by a further eight turbines three miles away in the Village of North Pickenham.

4

Local **policy review**

Over the planning period, Dereham is expected to accommodate at least:

1,553 new homes

9 hectares of new employment land

To deliver this, key sites include:

1. **New Sporle Road (South):** 51 dwellings
2. **New Sporle Road (North):** 75 dwellings
3. **Brandon Road:** 175 dwellings
4. **Norwich Road (South):**185 dwellings
5. **Sporle Road:** 130 dwellings
6. **Norwich Road (North):** 165 dwellings
7. **Eco-Tech Employment Area:** c. 9 hectares to the north and west of the Eco-Tech Centre

Swaffham's key development sites and Local Plan allocations

Economic **Function**

Swaffham's businesses

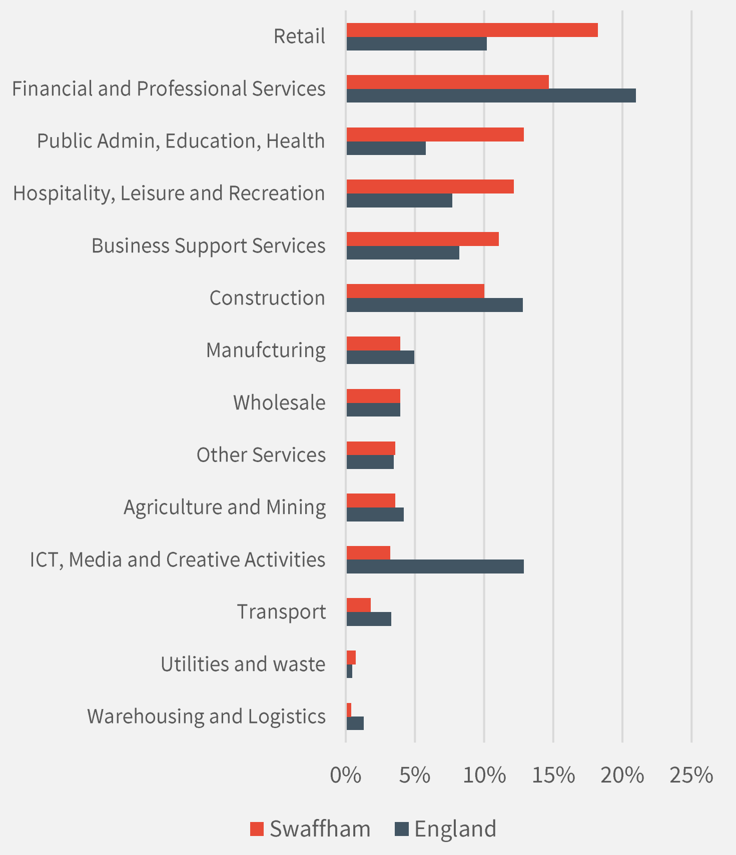
Swaffham is home to around 280 businesses.

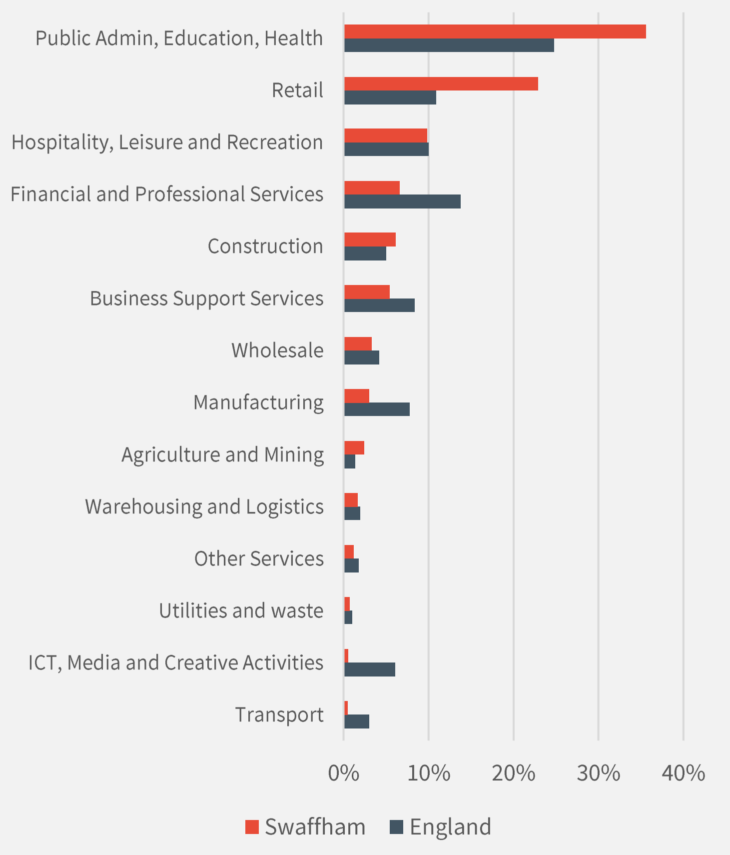
1

Swaffham's jobs

There are around 2,600 jobs in Swaffham.

2





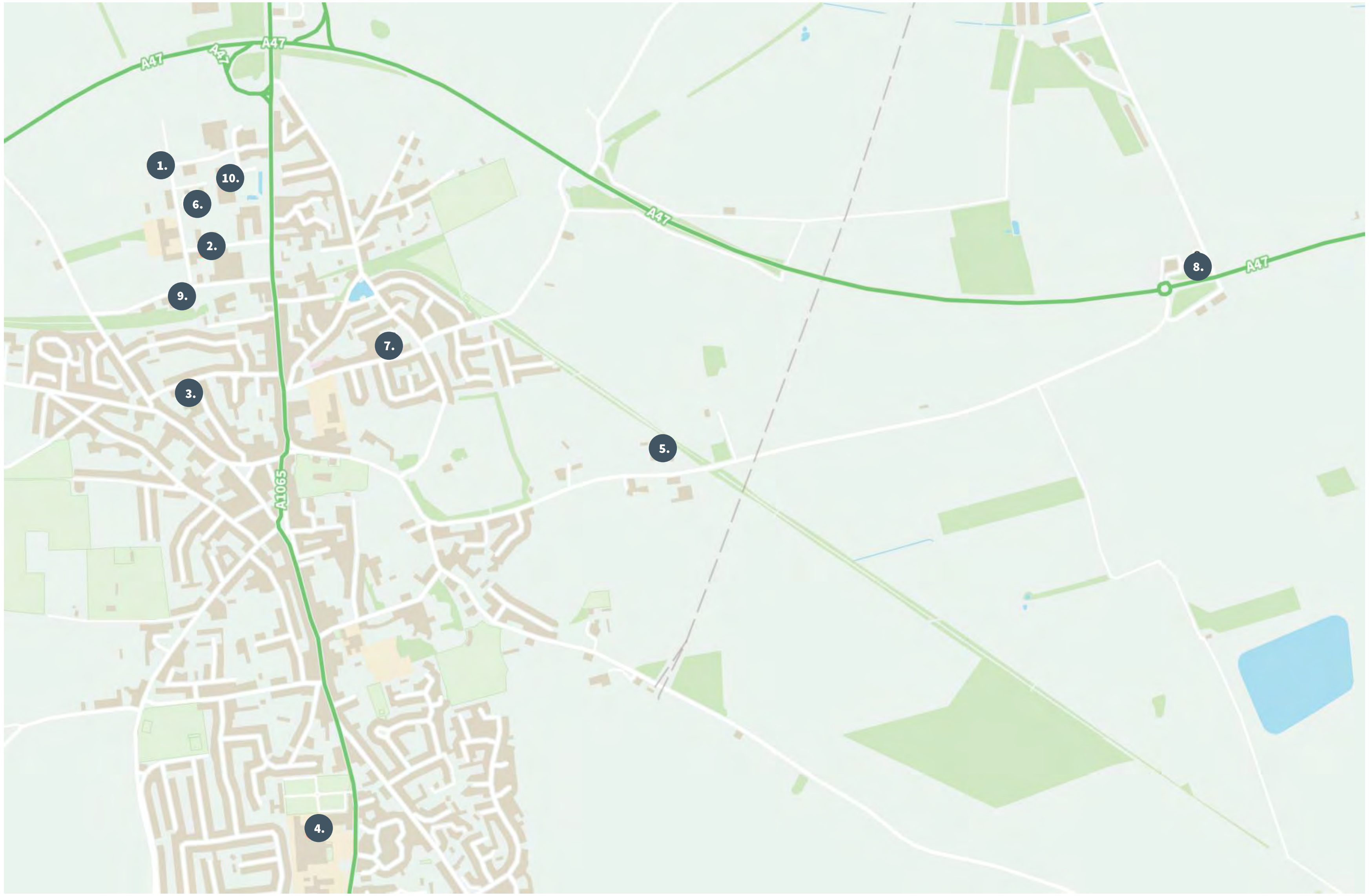
Swaffham's economy:

- Swaffham's business base has increased by 18% since 2000.
- Some of Swaffham's largest sectors by number of businesses include Retail (18% of total businesses), Financial and Professional Services (15%) and Public Administration, Education and Health (13%).
- There are around 2,600 jobs in Swaffham, with job numbers remaining stagnant since 2015.
- Swaffham's largest employment sectors are Public Administration, Education and Health (36% of total employment), Retail (23%) and Hospitality, Leisure and Recreation (10%).
- Retail and Hospitality, Leisure and Recreation account for 30% of businesses and 33% of total jobs in Swaffham and may mean that Swaffham has been more exposed to the economic impacts of COVID-19 than other places.
- High levels of employment within Public Admin, Education and Health and in Swaffham than is seen nationally may enable the town to withstand some of the economic impacts of COVID-19 through increased demand for work within this sector.

3

Source: IDBR, BRES, and UK Business Count. Analysis of Swaffham's economy draws on the ONS Inter-Departmental Business Register to provide a more granular understanding of the local economy, whilst statistics for England draw on the Business Register and Employment Survey and UK Business Count data sources, also from the ONS.

Swaffham's **major employers**



Using the Inter-Departmental Business Register, Swaffham's top 10 largest businesses by number of employees have been mapped across the town.

The analysis has excluded businesses which have their registered address in Swaffham, but do not have employees based on site. Typically, this includes recruitment agencies or cleaning businesses which are registered to a residential address.

Like Watton, the types of businesses shown here reinforces Swaffham's role as a local service centre – with many of the largest employers providing public services (such as GPs, social care, and schools). Other major employers include the town's larges supermarket chains.

Top 10 largest employers

1. Waitrose Ltd
2. Tesco Stores Ltd
3. NSHI Ltd
4. Academy Transformation Trust (The Nicholas Hamond Academy)
5. Healthcare Homes Group Ltd (Meadow House)
6. Manorcourt Care (Norfolk) Ltd
7. Norfolk Community Health & Care NHS
8. Bradecca Restaurants Limited
9. Narford Scaffolding Limited
10. Norfolk Care Homes Ltd

Source: IDBR

People: **labour market characteristics**

Swaffham's demographics

Swaffham has a significant ageing population with 34% of its residents aged 65 or over.

1

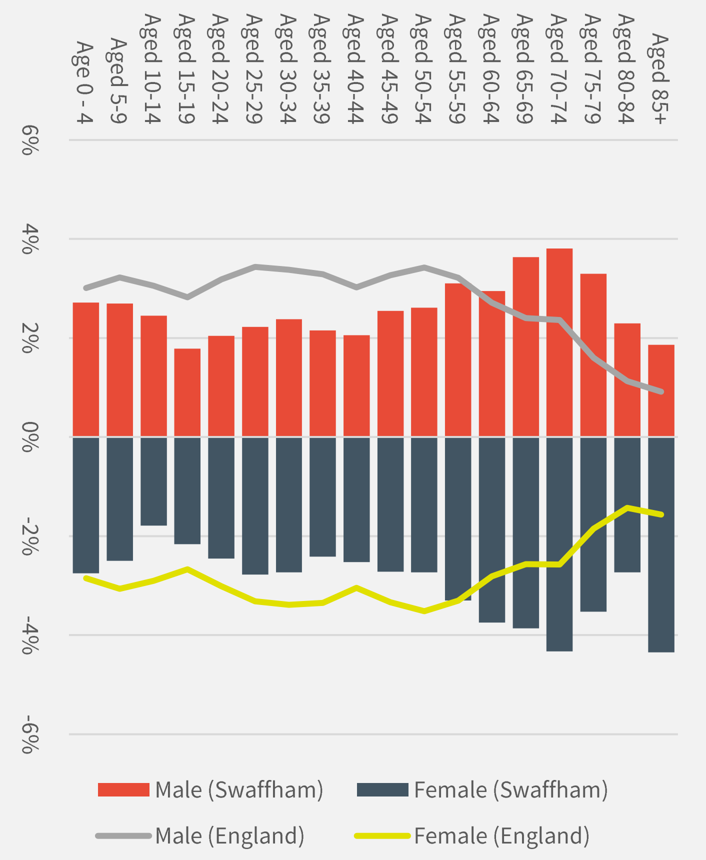
Swaffham's skills + employment

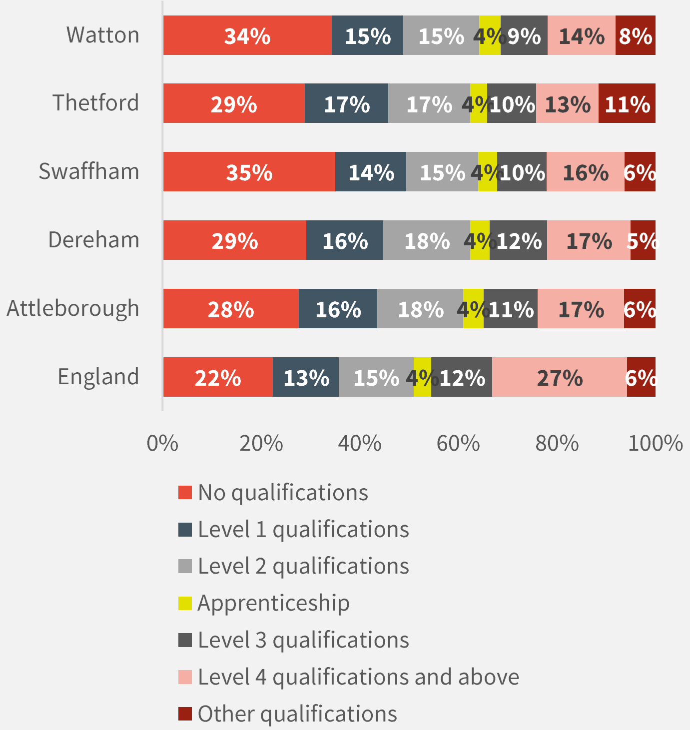
Qualification levels are predominantly low and mid level, with only 16% holding level 4 or above in 2011.

2

Swaffham's people:

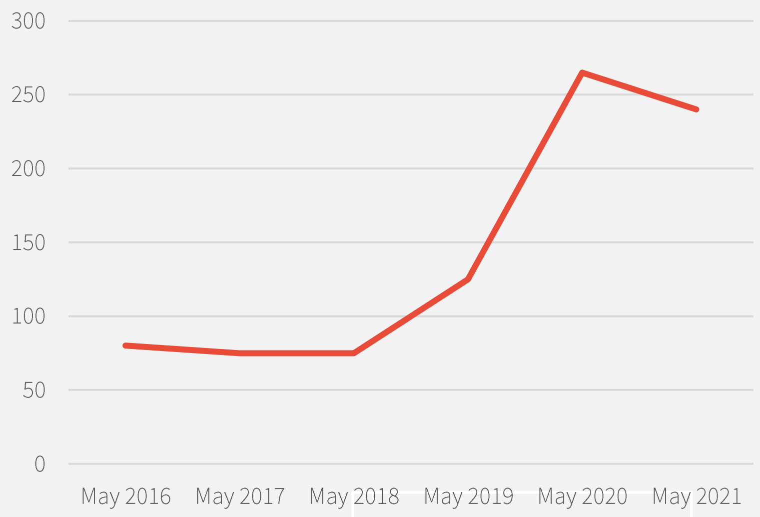
- Higher Education participation in Swaffham is low. Only 23.4% of Swaffham's young people go to university.
- The COVID-19 pandemic accelerated a significant upwards trajectory in the number of benefit claimants living in Swaffham. Between 2018 and 2020, the number of claimants increased by 253%.





Note: 2011 Census provides latest picture of qualification levels across at a town-level. This data cannot be directly compared to other datasets such as the Annual Population Survey, as the 2011 Census profiles the entire population whilst other datasets focus on the population aged 16-64.

Swaffham claimant count, 2016-2021



Source: Population Estimates. ONS

Place: **Swaffham's vitality**

Swaffham's vitality

Swaffham's deprivation challenge is widespread along the A1065 through the town.

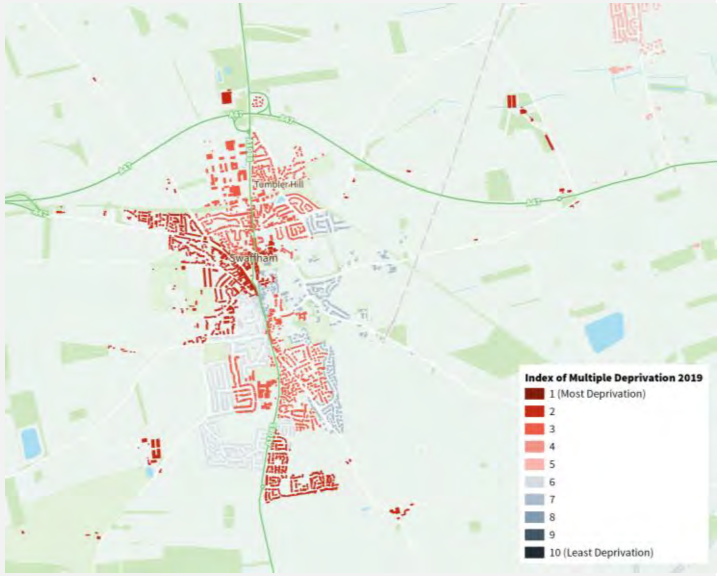
1

Swaffham's infrastructure

Digital connectivity is average with 97.3% of premises able to access Superfast speeds and 5% able to access the fastest speeds.

2

Index of Multiple Deprivation, 2019

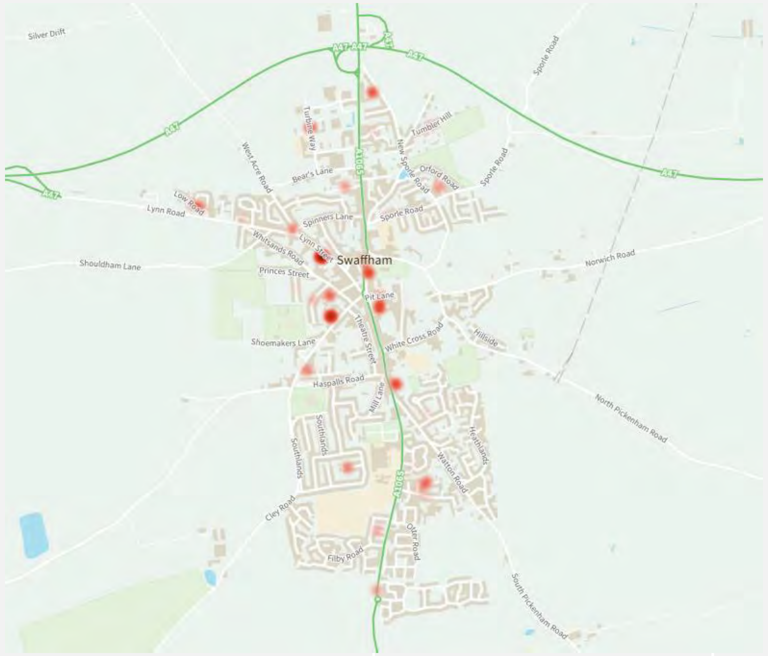


Superfast broadband connectivity, 2020

Swaffham's place vitality:

- Swaffham's town centre is most acutely affected by deprivation.
- Retail vacancy has fallen significantly in recent years. From 15% in 2014, this was as low as 5% in 2021.
- Swaffham has the third worst crime rate amongst Breckland's market towns. In 2020, there was 85 crimes per 1000 residents.

Swaffham crime hotspots, 2020



Source: Ministry of Housing, Communities and Local Government; Ofcom.

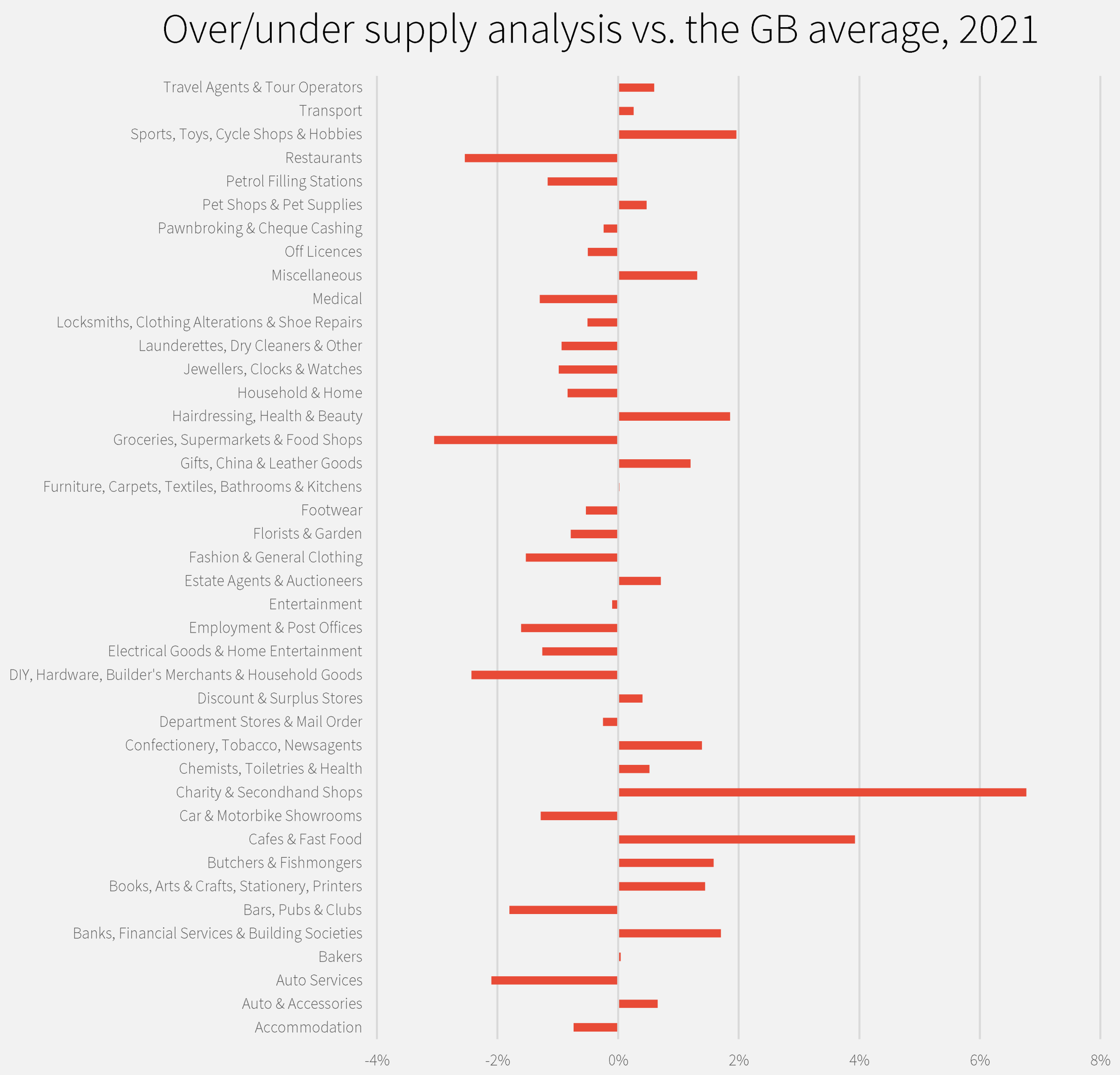
Swaffham's **retail vitality (1): Supply**

Lack of retail diversity indicated through significant over/undersupply challenges…

Although retail vacancy has fallen substantially in recent years across Swaffham, it has potentially led to a reduction in retail diversity.

The Local Data Company's supply data analyses the proportion of retail categories in a town versus the national average. This shows that relative to the national picture, Swaffham has an oversupply of charity and secondhand shops and cafés and fast food outlets.

Swaffham has a significant undersupply of food-related retailers. There is a 3% undersupply of supermarkets/food stores and restaurants. This indicates a weak experiential retail offer – with people less likely to be enticed to visit the town centre to eat and drink.



Source: Local Data Company

Swaffham's **retail vitality (2): Change**

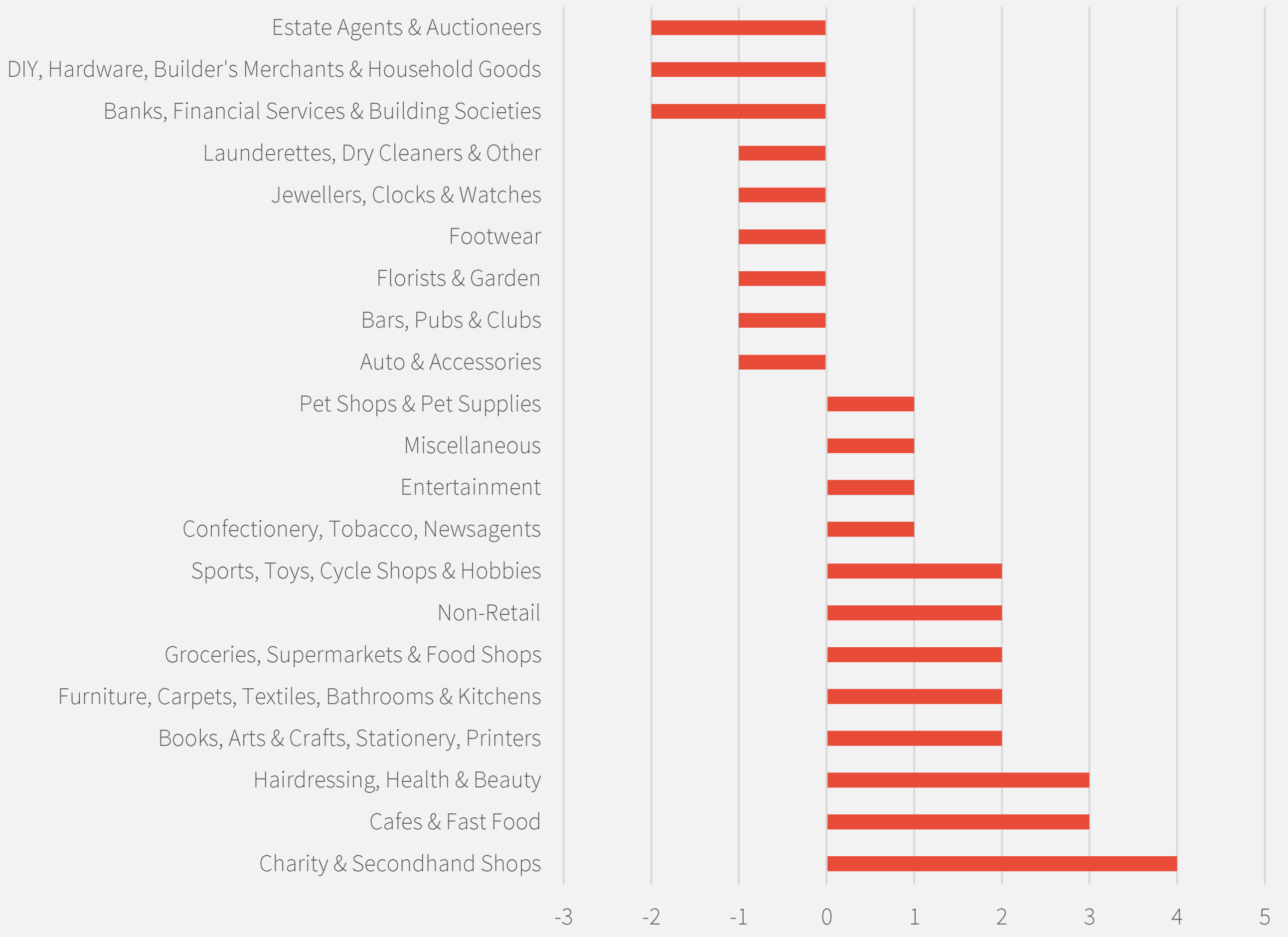
Significant growth in charity shops driving changes in retail vacancies…

The chart on the right assesses net openings/closings by category of retail. The greater number of net increases reflects the fact that the town's vacancy rates have fallen sharply in recent years with very low persistent vacancy rates (1% in 2021).

The chart on the right shows that between 2014 and 2021, Swaffham's largest net gains have been in charity and secondhand shops (+4). This includes the PACT Animal Sanctuary and East Anglia's Children's Hospices Shop which have both opened in the last five years.

Across the UK, charity shops now account for around 8% of all retail outlets on high streets. Polling conducted by Demos in 2017 indicated that 74% of UK adults had donated to charity shops in the previous 12 months and 61% had purchased at least one item from a charity shop over that same period.

Largest net increase/decrease by category, 2014/15-2020/21



Source: Local Data Company, Statista

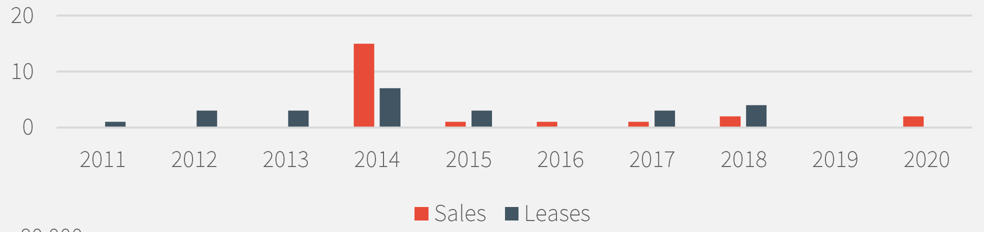
Swaffham's **commercial property**

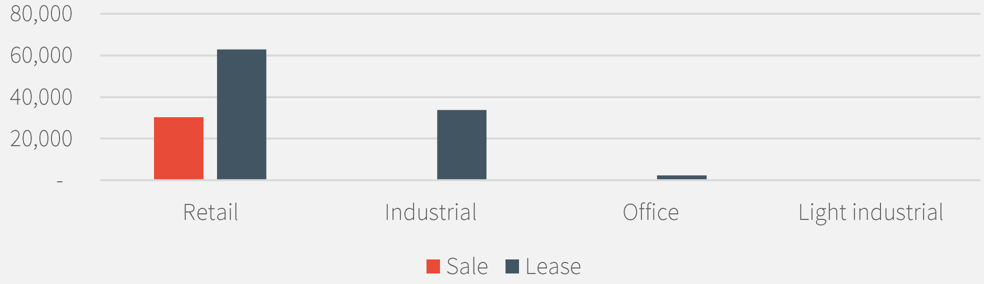
Small but more diverse commercial property provision...

Unlike the majority of Breckland's market towns, Swaffham's commercial property stock is not dominated by industrial and light industrial space.

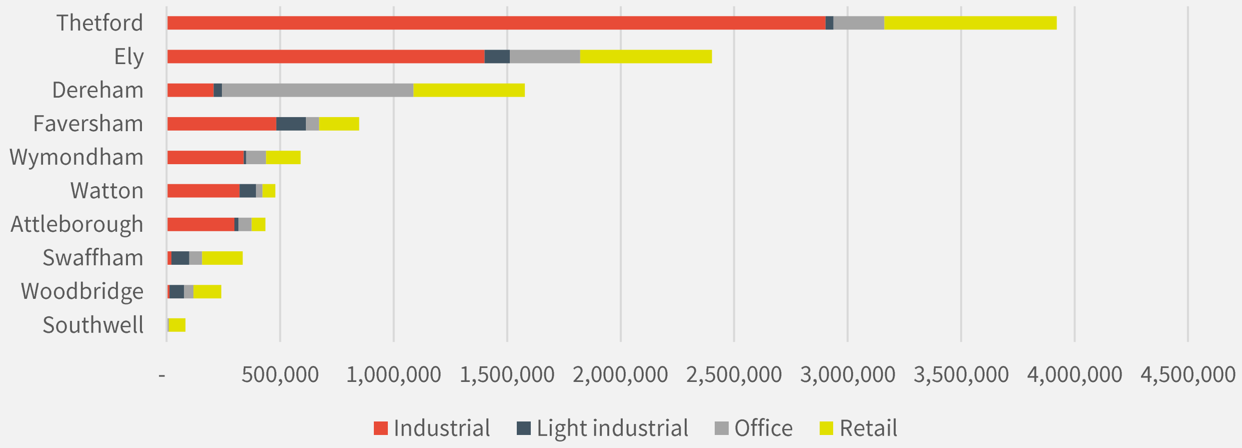
Swaffham has the smallest amount of commercial property of any town in Breckland. However, after Thetford, Swaffham has the largest stock of Grade B commercial floorspace. 22,243sqft of commercial property is of high quality. This helps to explain why commercial transactions are the highest in Swaffham outside of the largest towns of Dereham and Thetford.

Commercial transactions, 2011-2020



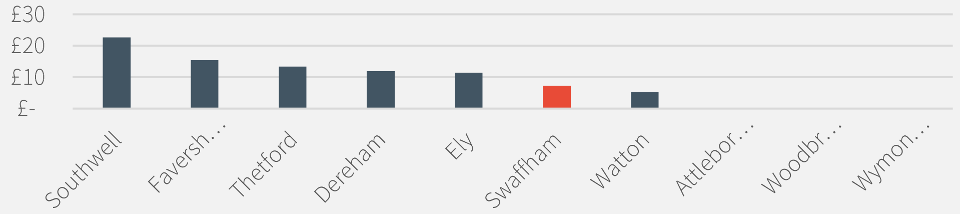


Commercial floorspace by town, 2020

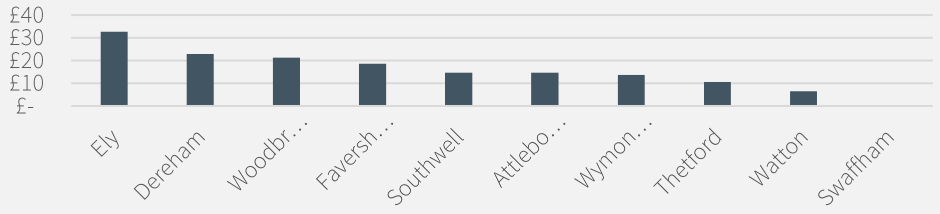


Rental value per sq ft, 2020

Office



Retail



Source: Costar

Swaffham's **accessibility (1)**

Good public transport links along the A47 corridor…

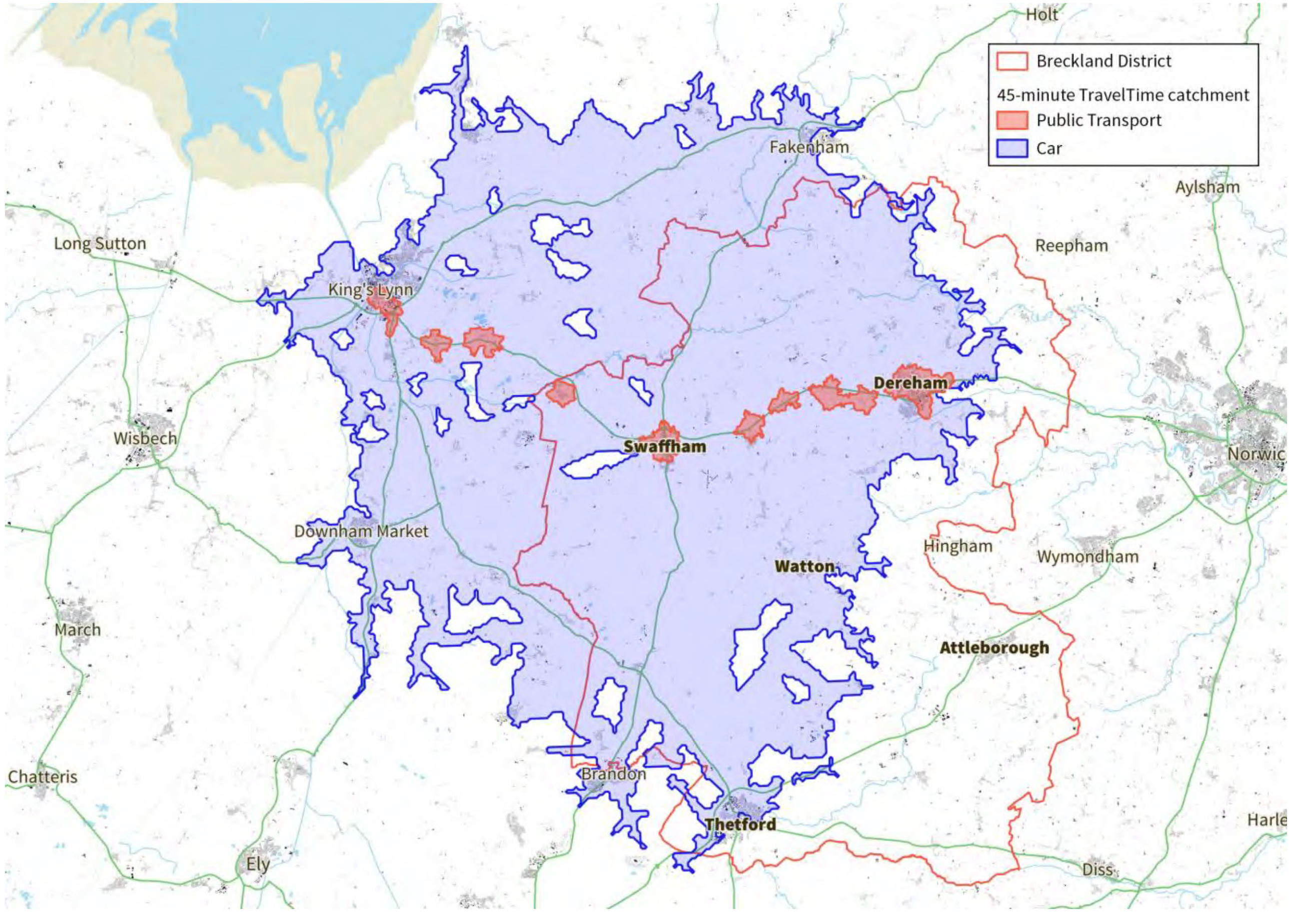
Swaffham's catchment stretches deep into north Norfolk, with towns such as King's Lynn and Fakenham both within a 45 minute drive from the town centre. Swaffham's location on two strategic A roads (A1065 and the A47) means that east-west connectivity is also strong. 227,000 people can get to Swaffham within 45 minutes, which includes just under three quarters of Breckland's population.

Similarly, public transport provision connecting Swaffham with neighbouring villages is relatively strong. 46,000 residents are able to reach Swaffham by public transport within a 45 minute journey time including residents of King's Lynn and Dereham.

Swaffham's catchment population by mode of travel

45-minute catchment	Total catchment population	Proportion of Breckland's residents
Public Transport	46,000	23%
Car	227,000	74%

Swaffham's 45-minute travel time catchments by car and public transport



Source: iGeolise, ONS Mid Year Population Estimates

Swaffham's **accessibility (2)**

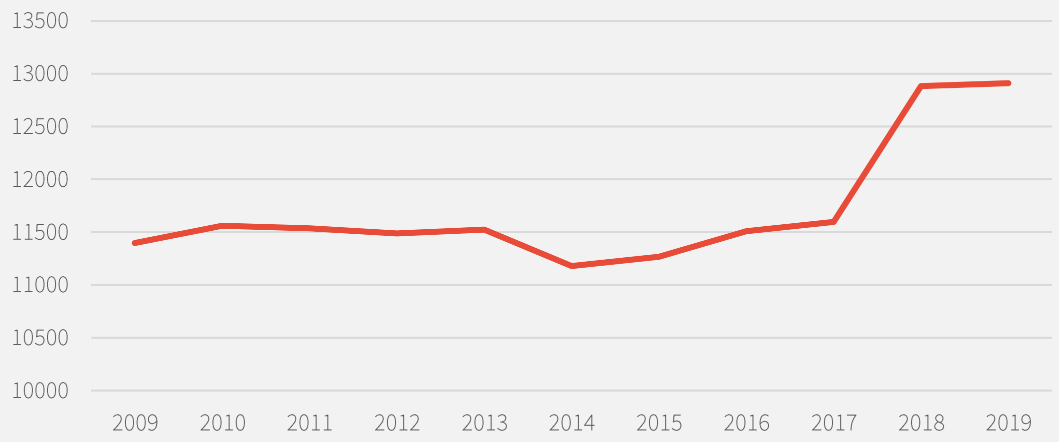
Increasing traffic heavily dominated by private car journeys…

The Department for Transport's Traffic Count data provides street-level data for every junction-to-junction link on the motorway and 'A' road network. The A1065 runs through Swaffham town centre, linking it to Brandon in the south and Fakenham in the North.

The data shows that in 2019 the average number of vehicles using the Swaffham exit of the A47 was 12,910 every day. Vehicle numbers have gradually increased steeply since 2017, increasing by 11% in 2 years.

Traffic counts within Swaffham's town centre reinforces a picture of car reliance and limited active transport uptake. Despite running through the town centre, pedal cycles only accounted for 0.3% of vehicles compared to 82% being either private cars or taxis. Increased congestion could affect Swaffham's air quality and make it a less attractive environment for cyclists and pedestrians.

Total vehicle count on the A1065, 2000-2019



Annual average daily flow by mode – A1065, 2019

Pedal cycle - 44 (0.3%)

Bus/coach - 29 (0.2%)

Motorbike - 101 (0.8%)

LGV – 1,441 (11.2%)

Cars/taxis – 10,556 (81.8%)

HGV - 782 (6.1%)

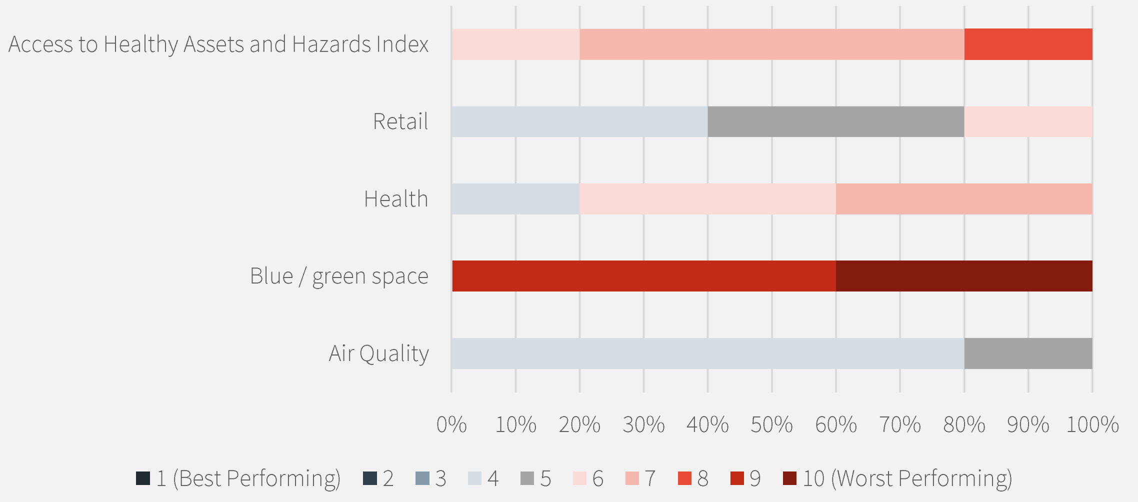
Source: DfT Traffic Counts

Social **infrastructure and healthy living**

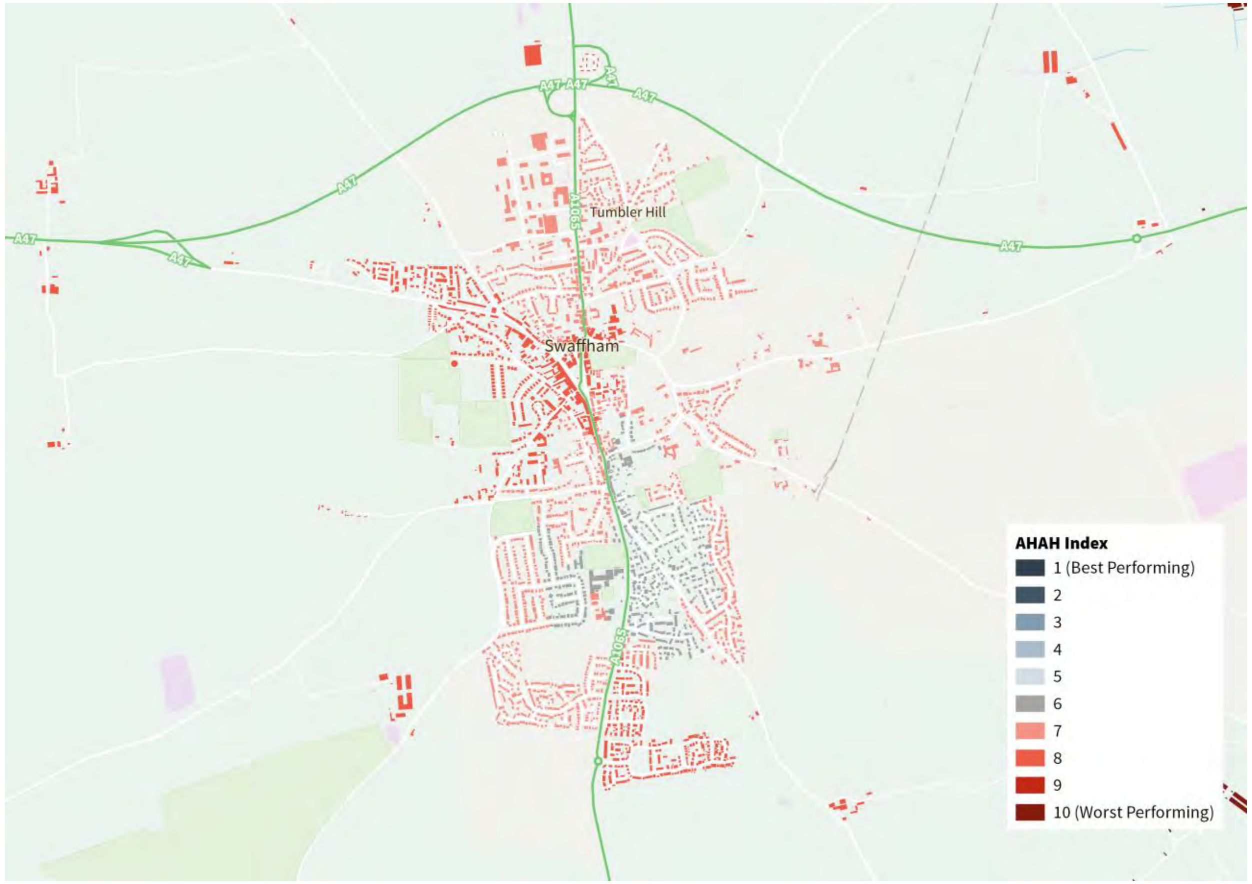
Access to the natural environment is the most prevalent challenge for Swaffham's neighbourhoods, with access to healthy assets affecting all neighbourhoods in the town centre

Overall scoring by the multi-dimensional AHAH index demonstrates poor performance most acutely affecting the town's periphery, particularly to the south of the town centre. The majority of Dereham's neighbourhoods fall within the top 32% worst performing in terms of the access to the natural environment, including access to green spaces such as parks and recreational spaces, and blue space such as rivers, canals and lakes.

Access to Health Assets and Hazards Index in Swaffham



Access to Health Assets and Hazards Index by neighbourhood



Source: Access to Healthy Assets and Hazards

Swaffham: **Observational analysis**

1.1
CURRENT POLICY & DEVELOPMENT

Town Centre Boundary

KEY

Town Centre Boundary

1.1 CURRENT POLICY & DEVELOPMENT

Significant Planning Applications

Over recent years, there has not been any major development happening in the town centre area. Sites for residential development coming forward are at the periphery of the town centre, with some planning applications coming forward for sites allocated in the Local Plan (such as no. 4 & 5). The introduction of housing at the Old School site development offers an opportunity to support activity and footfall in the town centre area.

1. 3PL/2017/0314/F - Construction of 9 dwellings

2. 3PL/2018/1323/F - New Police Station building and construction of hardstanding / landscaping, new access and external works

3. 3PL/2019/0483/O - Erection of 51 dwellings including access from New Sporle Road

4. 3PL/2019/0270/D - Erection of 165 dwellings, associated landscaping, open space, car parking & vehicular & pedestrian access

5. 3PL/2020/0729/D - Erection of up to 185 dwellings

6. Old School site - development including 18 residential units

Information collected August 2021

7. LP[097]008

8. LP[097]006

9. LP[097]009

KEY

Planning application - permission granted

Planning application - awaiting decision

Local Plan site allocations

1.1 CURRENT POLICY & DEVELOPMENT

Breckland District Council Assets

Sites within Breckland District Council's ownership offer a great opportunity for the Town Delivery Plan. Key sites include the parking and slack space in and around the Market Place and the cluster of sites around Turbine Way.

Notably, the Shambles are not within BDC ownership but is a mixture of private and Town Council owned land.

This map does not recognise the land within the Town Council's ownership, such as Campinglands.

KEY

BDC ownership

1.2

LOCAL ASSETS, HERITAGE & USES

Denominations of Open Space

The adjacent map reveals that green spaces in Swaffham town centre are limited. However, the green spaces that do exist are well used, especially Campinglands.

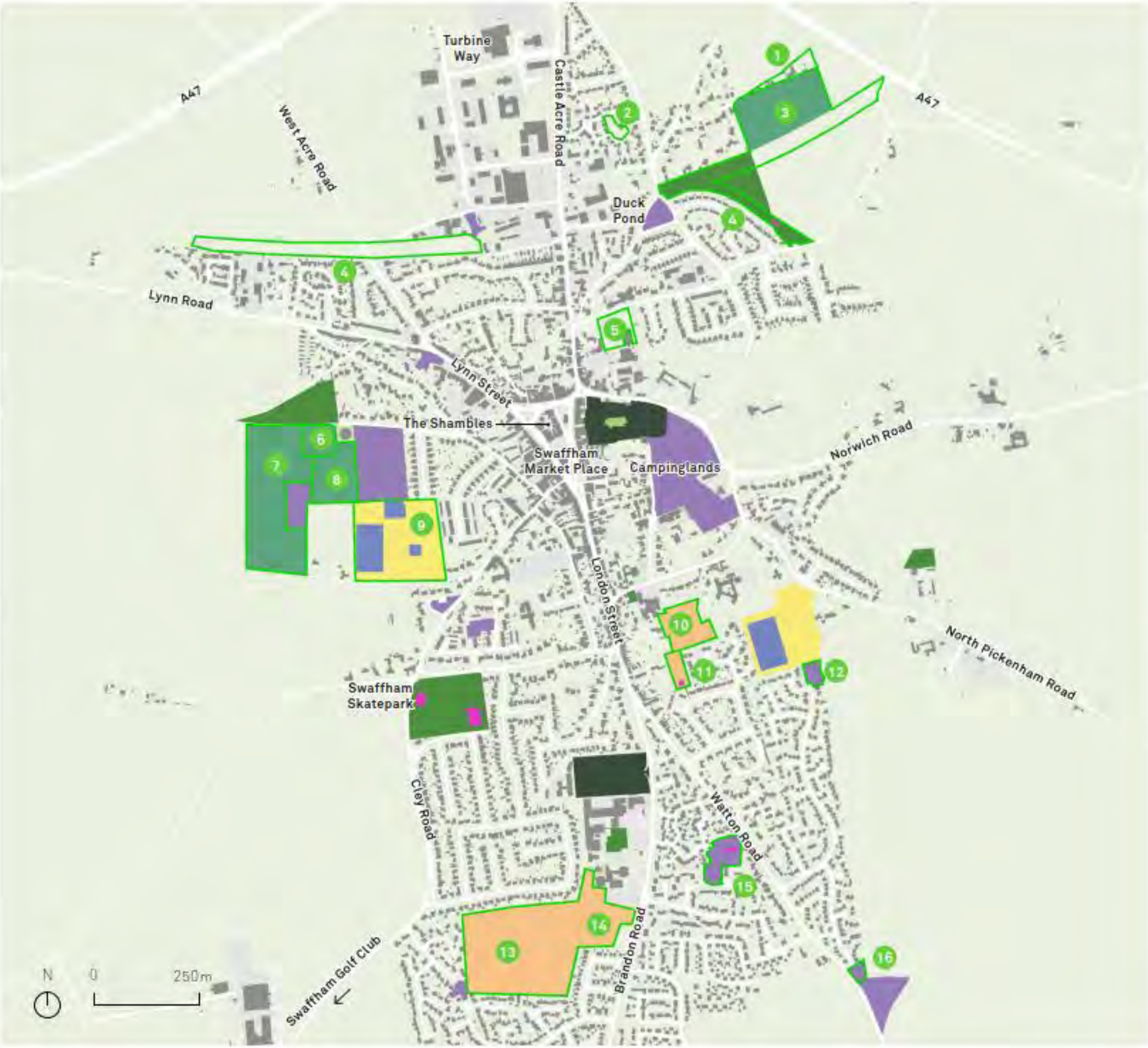
The pockets of open space around Market Place are genenerous, but are choked by the excessive and inefficient road network. Better organised cut-throughs and links between these spaces would benefit the town centre.

An abundance of allotment space can also be found on the town's peripheries, whilst open access play areas and a skate park occupy some of the parks further from the centre.

Designated Local Green Space

KEY

- Green space (Local Plan denomination)
- Open space (Local Plan denomination)
- Allotments / community growing space
- Religious grounds / cemetery
- Playing fields / recreation grounds
- Sports provision (football pitches, golf courses, basketball & tennis courts)
- School grounds
- Open access play area
- Designated Local Green Space (as recorded in Swaffham Neighbourhood Plan)



1.2 LOCAL ASSETS, HERITAGE & USES

Culture, Community & Leisure Assets

The adjacent map highlights the breadth of Swaffham's assets. Cultural infrastructure and community spaces are largely clustered around the Assembly Rooms in the centre and community centre by Campinglands, with education and leisure facilities towards the peripheries. High-end restaurant Strettons and the popular Saturday market are important draws for visitors, but slightly hidden. The evening economy offer is also very limited. Events and the offer of evening markets, could dramatically improve the draw to Swaffham. The community centre rents out space for a variety of community uses including a community fridge. The Assembly Rooms is more commonly booked for civic events and weekly auction.

KEY

Culture
C1 Horse and Groom pub
C2 Kings Arms pub
C3 Red Lion pub
C4 Greyhound pub
C5 White Hart pub
C6 Hayes Gallery
C7 Swaffham Auction (Saturday)
C8 Swaffham Market
C9 Strattons Hotel
C10 Plowright Place (shopping mews)
C11 Museum (Town Hall)

Health & leisure
L1 Community Allotments and Orchard
L2 Swaffham Cricket Club
L3 Swaffham Town Football Club
L4 Swaffham Rugby Club
L5 Recreation Ground, MUGA and Skate park
L6 Swaffham Leisure Centre
L7 Swimming Pool (site of old Derwent School)
L8 Orford Road play area
L9 (Former) Eco building and turbine
L10-12 Open play area

Education
E1 Sacred Heart Catholic VA Primary School
E2 Swaffham CE VC Infant School
E3 The Nicholas Hamond Academy
E4 Swaffham CE Junior Academy
E5 Swaffham Focus School

Community Spaces
D1 Merle Boddy Day Centre (mental health services)
D2 Swaffham Post Office
D3 Public Loos
D4 The Shambles
D5 Assembly Rooms
D6 Swaffham Town Hall
D7 Swaffham Library
D8 Swaffham Community Centre (Iceni)

Religious
R1 St Peter and St Paul Church
R2 Swaffham Methodist Church

Medical, Care & Other Services
M1 Swaffham Community Hospital
M2 Manor Farm Medical Centre
M3 Campingland Surgery
M4 Plowright Medical Centre: vaccination centre
M5 Iceni House Care Home
M6 Swaffham Police Station

1.2 LOCAL ASSETS, HERITAGE & USES

Heritage Assets & Conservation Zones

Swaffham's impressive Georgian market town architecture is reflected in the adjacent map and its concentration of listed buildings in and around the conservation area. The conservation area extends from the start of Ash Close to the North to The Pightle further south; this area includes the Market Place, The Shambles and its surrounding architecture. The wider HSHAZ gives Swaffham access to funding provided by Historic England.

Observational analysis suggests that the unit size of buildings around Market Place could be inhibiting the uptake of medium-sized restaurant chains and outlets of a similar use class.

KEY

Notable Heritage Assets
H1 The Pedlar
H2 War Memorial
H3 Corn Hall
H4 St Peter and St Paul Church
H5 Manor House
H6 Buttercross
H7 Swaffham Town Hall
H8 Swaffham Methodist Church
H9 Church Rooms
H10 Shirehall
H11 Assembly Rooms

Listed Buildings

Conservation Area

High Street Heritage Action Zone

Primary Shopfronts

Secondary Shopfronts

NB: All 'heritage assets' (aside from the War Memorial and The Pedlar) are also listed buildings

1.2
LOCAL ASSETS, HERITAGE & USES

Architectural Features

1.1 The Buttercross

1.2 Swaffham is celebrated for its Georgian market town architecture

1.3 Several historically significant buildings are poorly maintained or neglected. Re-development is planned for the Old School building above

1.4 Swaffham has the potential to offer a very spacious public realm if it were to reclaim some of its cluttered road network

1.5 Ash Close, a tranquil route tucked away from the noise-polluted and traffic-laden town centre. Strattons hotel is a hidden gem with great appeal

1.6 Hall in Swaffham Community Centre (managed by the ICENI Partnership)

1.7 Plowright Place shopping mews is a hidden gem and offers a potential cut through route to the long stay car park. Businesses such as the Teapot Cafe are destinations

1.7 St Peter and St Paul Church

1.3

TANSPORT & MOVEMENT

Public Transport & Active Travel

Swaffham is served by four bus routes offering good connections Kings Lynn to Norwich and Dereham. The main bus hub is centrally located just behind The Shambles and public toilet. However the current over abundance of parking and road network detracts from this opportunity.

There are no national cycle routes and there is a lack of cycle infrastructure throughout the town centre.

KEY

- Bus routes (10, 11, 31, 32, 52, A-C Excel)
- Bus stops
- Local cycleway
- Bridleway
- Footway

1.3

TRANSPORT & MOVEMENT

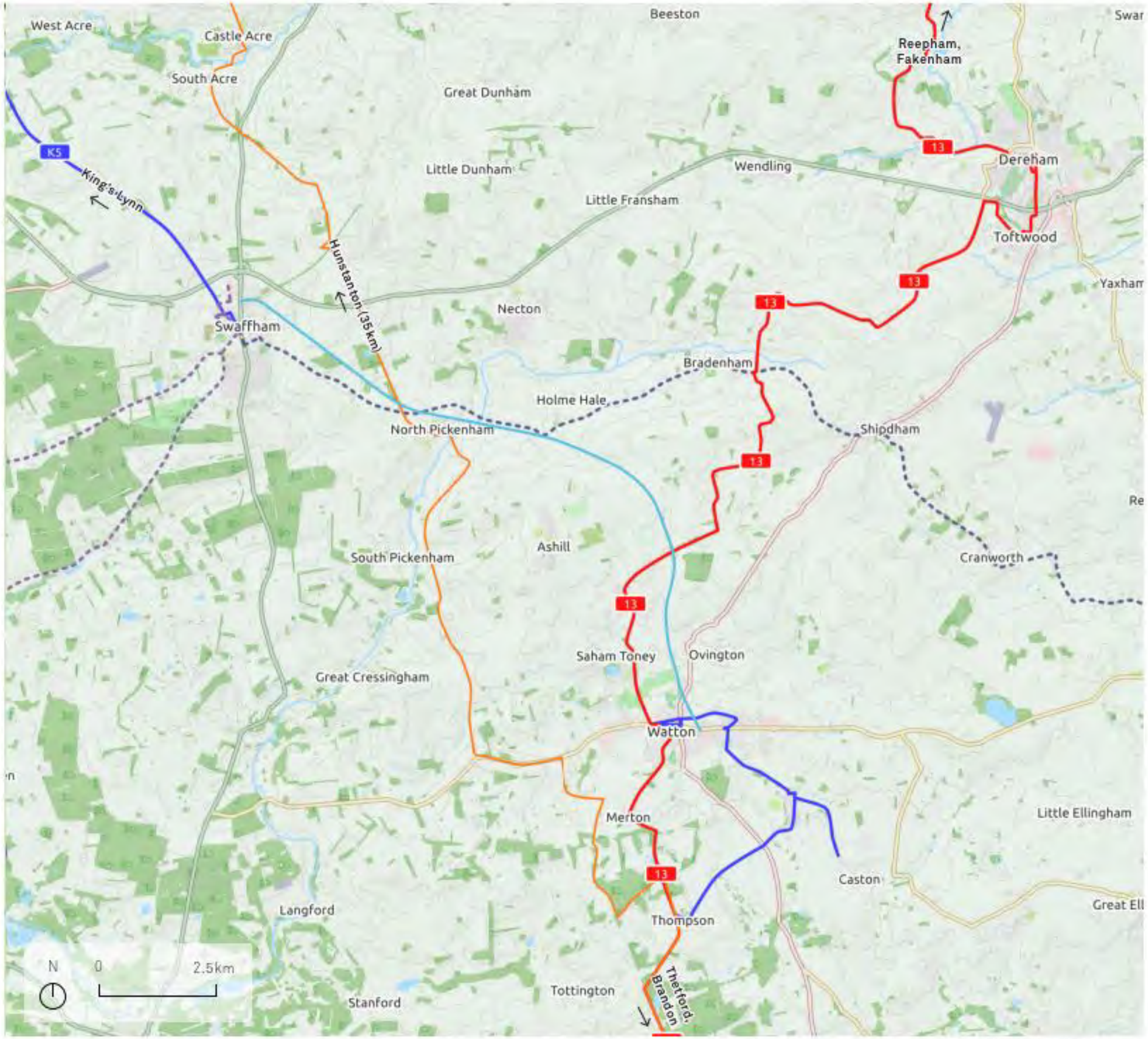
Wider Cycling & Walking Infrastructure

The established infrastructure of wider walking, cycling and leisure routes present unique opportunities to the town delivery plans. There are opportunities to both improve connectivity between towns and to better incorporate the towns into cycleways and walking trails.

The improved connectivity has the potential to draw more people from neighbouring towns and villages, increasing footfall whilst encouraging greener means of transport.

The Peddar's Way, a long-distance hiking trail, passes close to both Swaffham and Watton. With good signage and improved offer for ramblers, they could be encouraged to use these towns as stopping points.

The EXPERIENCE project by Norfolk County Council will initiate a series of artworks and points of interest along the Peddar's Way which could offer an opportunity to link to Swaffham.



Source: https://www.openstreetmap.org/#map=12/52.6210/0.7290&layers=C

KEY

- Peddars Way (UK National Trail route)
- National cycleway 13
- Local cycleway
- Old railway: potential cycleway project

1.3
TRANSPORT & MOVEMENT

Perceptive Study of the Public Realm

1.1 The town centre is dominated by an inefficient road network, with expanses of roadway
1.2 Excessive parking utilises valuable space in the town centre. On non-market days, the market-place is used for parking
1.3 As the last market town before the North Norfolk Coast, Swaffham experiences a steady flow of traffic and is often gridlocked on Fridays and Sundays with north-south traffic
1.4 Lack of signage hampers the legibility of Theatre Street's long-stay car park and interferes with its servicing of the town centre. This limits its use and encourages people to park closer to the centre
1.5 Heavy traffic and noise polution considerably diminish the quality of the public realm
1.6 The pandemic has seen an increase in the use of spillout spaces in front of cafes and pubs, but heavy traffic and noise pollution can be disruptive
1.7 Swaffham's roads carry a steady flow of heavy-goods vehicles
1.8 The Shambles, a popular cut-through between Market Place, Mangate St and A1065, is inaccessible to those with prams or on mobility scooters
2.1 Newly paved shared surface is not legible and thus contested by pedestrians and vehicles
2.2 Lack of formal crossing points in Market Place central creates an unsafe environment
2.3 Cycle storage provision
2.4 The 2 arms to Swaffham's road network contribute to an excess of roadway and tarmac

KEY
- Pedestrian routes and cut-throughs
- Formal crossings
- Informal crossings
- North-south vehicular traffic
- Vehicular roadways
- Access only/ shared surface
- Parking

1.3
TRANSPORT & MOVEMENT

Perceptive Study of the Public Realm


1.1 The town centre is dominated by a cluttered and inefficient road network, with its expanses of tarmac and roadway


1.2 Excessive parking utilises valuable space in the town centre. On non-market days, the market-place is used for parking


1.3 As the last market town before the North Norfolk Coast, Swaffham experiences a steady flow of traffic and is often gridlocked on Fridays and Sundays with north-south traffic


1.4 Lack of signage and narrow pavements hampers the legibility to Theatre Street's long-stay car park. This limits its use and encourages people to park closer to the centre


1.5 Heavy traffic and noise polution considerably diminish the quality of the generous public realm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Perceptive Study of the Public Realm

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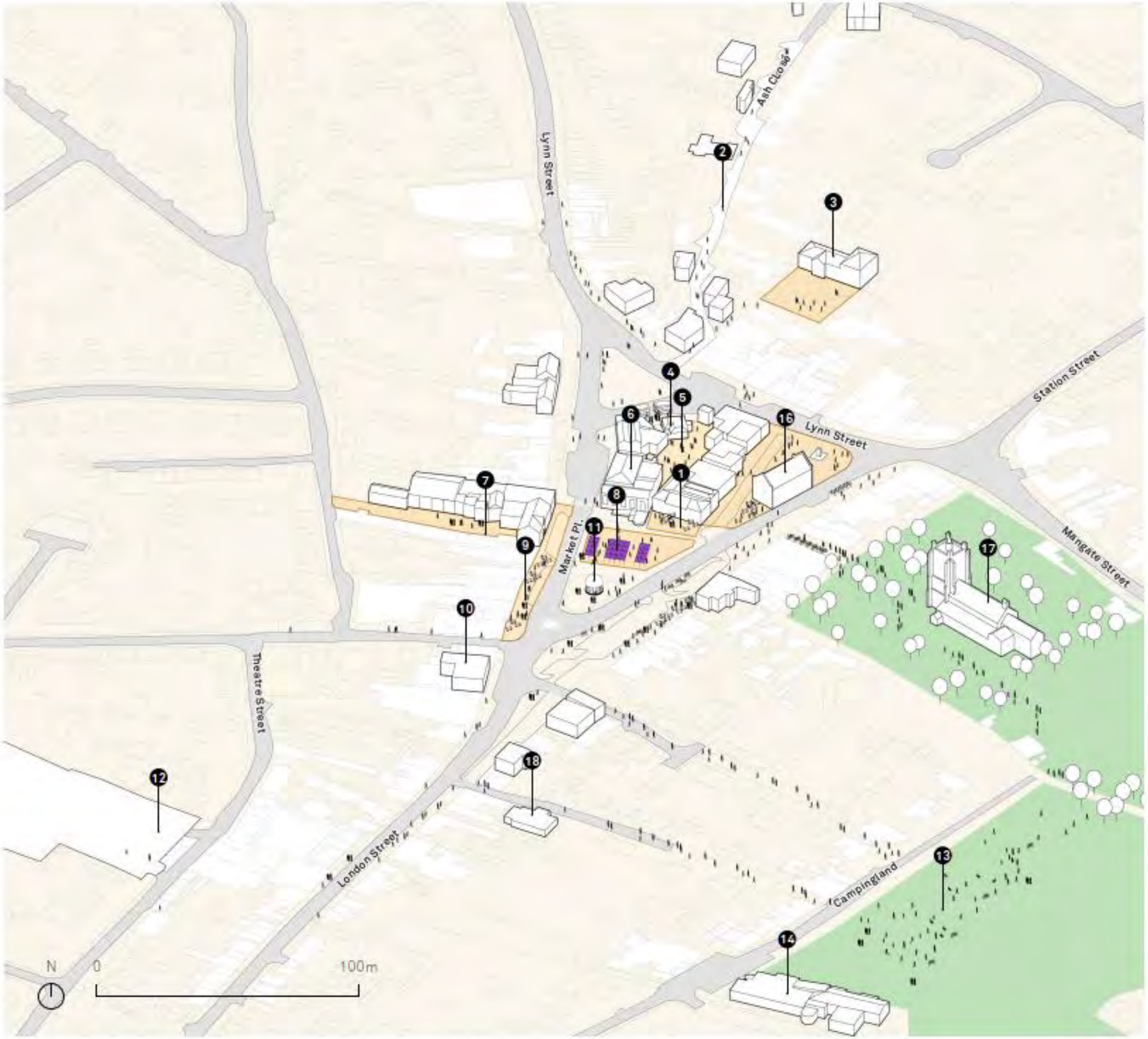
1.4 STRENGTHS, WEAKNESSES, OPPORTUNITIES & THREATS

Spatial Overview



KEY

Strengths and Opportunities

[1. Turbine Way vacant plot]
2. Ash Close
3. Stretton's Hotel and Restaurant
4. Public Loos
5. The Shambles
6. Assembly Rooms
7. Plowright Place shopping mews
8. Saturday Market
9. Spillout space in front of cafes and pubs
10. Town Hall and Museum
11. Buttercross
12. Theatre long-stay car park
13. Campinglands
14. Community centre; Iceni Partnership
[15. (Former) Green Britain Centre]
16. Corn Hall
17. St Peter and Paul Church
18. Swaffham Library

Breckland Evidence Base

For more information,
please visit www.hatch.com