

Breckland Retail Study 2017 Addendum

Breckland District Council

13 March 2017

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1.0 Introduction

- 1.1 Lichfields (formerly trading Nathaniel Lichfield and Partners) was commissioned by Breckland District Council to prepare a district wide town centre and retail study in 2010. The 2010 study was fully updated in a report dated December 2014.
- 1.2 In order to assess recent changes, Lichfields has been commissioned to undertake a partial update based on the latest population and expenditure projections. This report should be read alongside the Breckland Retail Study Update 2014 (BRSU 2014).
- 1.3 This partial update re-assesses the quantitative scope for new retail and food and beverage floorspace in Breckland District up to 2036. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping.
- 1.4 All monetary values expressed in this analysis are at 2015 prices unless stated otherwise, consistent with Experian's latest local expenditure estimates. The BRSU 2014 was based on 2012 prices, and therefore the expenditure and turnover figures within the two reports are not directly comparable.

2.0 **Methodology and Base Data**

2.1 The quantitative analysis is based on a study area defined for the five main shopping centres within the District i.e. Thetford, Dereham, Swaffham, Watton and Attleborough, as defined in the BRSU 2014, see Appendix 1.

Consumer Expenditure

2.2 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's latest local consumer expenditure estimates for comparison and convenience goods for the study area for the year 2015 have been obtained.

2.3 Expenditure projections per person for convenience, comparison goods and food and beverage are shown in Table 2 in Appendix 2, 3 and 4, respectively.

Population

2.4 The BRSU 2014 was based on Office of National Statistics (ONS) 2012-based projections for Breckland District. The latest ONS projections are the 2014-based data. These revised projections have been adopted in this report.

2.5 The previous study assumed the majority (95%) of the population growth in the District would be focused in Thetford and Attleborough, of which 60% would be located in the Thetford and 40% in the Attleborough area. The remaining 5% growth was spread throughout the other zones on a pro-rata basis. This update adopts a revised proportional distribution of population growth, as follows:

- Attleborough 25%;
- Thetford 25%;
- Dereham 10%;
- Swaffham 10%;
- Watton 10%; and
- All other areas 20%.

2.6 The BRSU 2014 indicated that the study area population would increase from 168,175 in 2011 to 197,244 in 2036, based on ONS 2012 projections. The updated projection based on the ONS 2014 projections is marginally higher at 198,073 in 2036.

Available Spending

2.7 The levels of available spending are derived by combining the population in Table 1 with per capita spending figures Table 2 for convenience goods in Appendix 2; comparison goods in Appendix 3 and food and beverage in Appendix 4.

2.8 For both convenience and comparison spending, a reduction has been made for special forms of trading such as mail order, e-tail (non-retail businesses) and vending machines.

2.9 Special Forms of Trading (SFT) and non-store activity is included within Experian's expenditure estimates, which includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. Experian provide projections for E-tailing and other SFT. These projections have been

used to exclude expenditure attributed to e-tailing through non-retail businesses, which will not directly impact on the demand for retail floorspace.

- 2.10 Based on Experian's latest data SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 2.7% and 12.0% of total convenience and comparison goods expenditure respectively in 2015. The projections provided by Experian suggest that these percentages will increase to 5.1% and 16.4% by 2033.
- 2.11 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase from £327.56 million in 2015 to £428.33 million in 2036, as shown in Table 3 in Appendix 2.
- 2.12 Comparison goods spending is forecast to increase from £476.22 million in 2015 to £950.64 million in 2036, as shown in Table 3 in Appendix 3.
- 2.13 Food and beverage spending is forecast to increase from £165.56 million in 2015 to £250.55 million in 2036, as shown in Table 3 in Appendix 4.

3.0 Capacity for Convenience Floorspace

- 3.1 The results of the household shopper questionnaire survey, undertaken by NEMS in July 2014 were used to estimate base year shopping patterns within the study area. The market shares/shopping patterns are shown at Table 4 in Appendix 2.
- 3.2 Table 5 in Appendix 2 indicates that the level of convenience goods expenditure attracted to shops/stores in the Breckland District in 2015 is estimated to be £272.21 million.
- 3.3 Oxford Retail Consultants' (ORC) StorePoint database provides estimates of net sales area within food stores across the country. Figures for the first quarter of 2017 have been adopted in this update. Estimates for comparison sales floorspace within large food stores has been deducted, for consistency with the use of goods based expenditure figures.
- 3.4 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Mintel. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 11 in Appendix 2, and a benchmark turnover for each store has been calculated. This benchmark turnover is not necessarily the actual turnover of the food store, but it does provide a useful benchmark for assessing existing shopping patterns and the adequacy of current floorspace in quantitative terms.
- 3.5 Average sales densities are not widely available for smaller convenience shops, particularly independent retailers. An average sales density of £5,000 per sq.m has been adopted for small convenience shops, consistent with the BRSU 2014. The total benchmark turnover of existing convenience sales floorspace within Breckland District is £285.63 million (excluding local shopping facilities outside the main town and district centres).
- 3.6 The assessment of shopping patterns suggests that convenience goods expenditure available to facilities (excluding local shops) in the District at 2015 is £265 million. These figures suggest that collectively convenience retail facilities in the District are trading 7.2% below national average levels.
- 3.7 The future level of available convenience goods expenditure at 2019, 2021, 2026, 2031 and 2036 is shown at Tables 8 to 11 in Appendix 2.
- 3.8 The total level of available convenience goods expenditure available for shops in Breckland between 2016 and 2033 is summarised in Table 14 (Appendix 2). The benchmark turnover of existing convenience floorspace and food store commitments have been subtracted from the estimates of available expenditure to provide surplus expenditure estimates.
- 3.9 The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 14 in Appendix 2. Surplus expenditure is converted into floorspace estimates based on an assumed average sales density figure of £11,394 per sq.m, the average turnover density of the main food supermarket operators (Aldi, Asda, Lidl, Morrison's, Sainsbury's, Tesco and Waitrose) because new floorspace is likely to be provided by these main operators rather than small independent convenience shops.
- 3.10 There is a projected expenditure deficit in Swaffham and therefore a negative floorspace requirement is indicated over the plan period, due to the recent implementation of Tesco and Waitrose stores in Swaffham. In the other main settlements, surplus convenience goods expenditure could support additional floorspace in line with population growth. The figures are summarised in Table 3.1.

Table 3.1: Summary of Convenience Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	-1,456	-589	277	1,231
Dereham	514	1,240	1,971	2,786
Swaffham	-3,485	-3,135	-2,787	-2,407
Watton	117	306	495	701
Attleborough	-148	381	905	1,464
Other Breckland	10	71	133	202
Total	-4,449	-1,725	994	3,976

Source: Table 12 in Appendix 2.

- 3.11 Expenditure projections could support 696 sq.m net (994 sq.m gross) of convenience goods floorspace by 2031 in the District as a whole. The 2036 projection is 2,783 sq.m net (3,976 sq.m gross).
- 3.12 The BRSU 2014 suggested 3,198 sq.m net (4,568 sq.m gross) could be supported by 2036. The updated figures are marginally lower due to Experian's lower expenditure projections for convenience goods.

4.0 Capacity for Comparison Floorspace

4.1 Breckland District attracts £214.18 million of comparison goods expenditure in total in 2015 (Table 5 in Appendix 3). The future level of comparison goods expenditure available to shops in Breckland District has been projected to 2019, 2021, 2026, 2031 and 2036, as shown in Tables 6 to 11 in Appendix 3.

4.2 Future available expenditure is compared with the projected turnover of existing comparison goods retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 13 in Appendix 3. The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 14.

4.3 Trends indicate that comparison retailers historically will achieve some growth in trading efficiency. This is a function of spending growing at faster rates than new floorspace provision and retailers' ability to absorb real increases in their costs by increasing their turnover to floorspace ratio. Table 13 therefore assumes that the existing turnover of comparison floorspace will increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted as recommended by Experian.

4.4 The figures are summarised in Table 4.1.

Table 4.1: Summary of Comparison Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	-1,104	711	2,757	4,892
Dereham	362	2,342	4,600	6,960
Swaffham	103	398	728	1,073
Watton	152	581	1,062	1,563
Attleborough	-381	248	939	1,655
Other Breckland	-2	35	78	123
Total	-870	4,315	10,164	16,266

Source: Table 14 in Appendix 3.

4.5 Expenditure projections could support 7,623 sq.m net (10,164 sq.m gross) of comparison goods floorspace by 2031 in the District as a whole. The 2036 projection is 12,199 sq.m net (16,266 sq.m gross).

4.6 The BRSU 2014 suggested 11,504 sq.m net (15,339 sq.m gross) could be supported by 2036. The updated figures are only slightly higher.

5.0 Capacity for Food and Beverage Floorspace

5.1 Breckland District attracts £71.92 million of food and beverage expenditure in total in 2015 (Table 5 in Appendix 4). The future level of food and beverage expenditure available to outlets in Breckland District has been projected to 2019, 2021, 2026, 2031 and 2036, as shown in Tables 6 to 10 in Appendix 4.

5.2 Future available expenditure is compared with the projected turnover of existing food and beverage facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 12 in Appendix 4. The estimates of surplus/deficit expenditure are converted into floorspace projections in Table 13. The figures are summarised in Table 5.1.

Table 5.1: Summary of Food and Beverage Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	155	404	666	925
Dereham	120	352	602	849
Swaffham	41	99	160	220
Watton	32	81	131	181
Attleborough	174	388	607	820
Other Breckland	90	226	367	506
Total	612	1,551	2,533	3,502

Source: Table 13 in Appendix 4.

5.3 Expenditure projections could support 2,533 sq.m gross of food and beverage floorspace by 2031 in the District as a whole, increasing to 3,502 sq.m gross in 2036.

5.4 The BRSU 2014 suggested 3,715 sq.m gross could be supported by 2036. The updated figures are only slightly lower.

6.0

Conclusions

6.1

This report provides an update of the District wide needs assessment for retail and food and beverage floorspace in Breckland. The NPPF states that local planning authorities should assess the quantitative and qualitative needs for land or floorspace for retail development and main town centre uses over the plan period.

6.2

Long term floorspace capacity forecasts beyond 2026 are susceptible to change due to unforeseen circumstances. Long term projections beyond 2026 are not only subject to changes in terms of population growth, but also growth in expenditure per capita and growth in turnover efficiencies. Experian's recommended growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored. Small variations in Experian's recommended growth rates (i.e. published annually) can lead to large variations in floorspace capacity when projected over a long period, therefore long term projections must be treated with caution and kept under review.

Floorspace Projections

6.3

The quantitative assessment of the potential capacity for new retail floorspace suggests that there is scope for new development within Breckland. The projections suggest new floorspace (over and above commitments) should be distributed as shown in Tables 6.1, 6.2 and 6.3.

Table 6.1 Convenience Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	0	1,231	1,231
Dereham	1,240	1,546	2,786
Swaffham	0	0	0
Watton	306	395	701
Attleborough	381	1,083	1,464
Other Breckland	71	131	202
TOTAL	1,998	4,386	6,384

Source: Table 14 in Appendix 2.

Table 6.2 Comparison Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	711	4,181	4,892
Dereham	2,342	4,618	6,960
Swaffham	398	675	1,073
Watton	581	982	1,563
Attleborough	248	1,407	1,655
Other Breckland	35	88	123
TOTAL	4,315	11,951	16,266

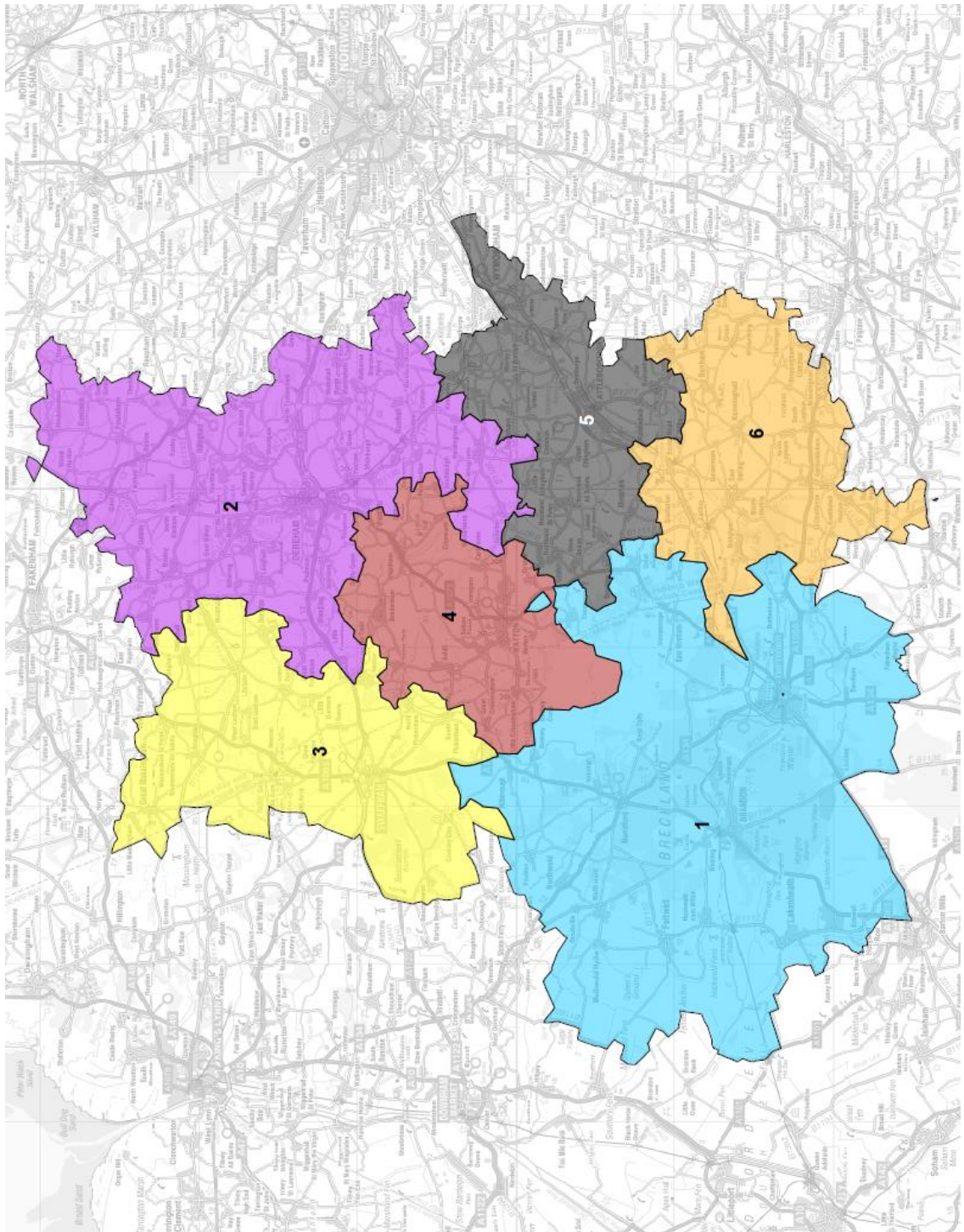
Source: Table 14 in Appendix 3.

Table 6.3 Food and Beverage Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	404	521	925
Dereham	352	497	849
Swaffham	99	121	220
Watton	81	100	181
Attleborough	388	432	820
Other Breckland	226	280	506
TOTAL	1,551	1,951	3,502

Source: Table 13 in Appendix 4.

Appendix 1: Study Area



Appendix 2: Convenience Assessment

Table 1: Study Area Population

Zone	2011	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,874	58,608	60,116	61,972	63,634	65,142
Zone 2 - Dereham	44,466	45,965	46,333	47,086	48,014	48,845	49,599
Zone 3 - Swaffham	16,610	17,170	17,464	18,067	18,809	19,474	20,077
Zone 4 - Watton	18,168	18,781	19,074	19,677	20,420	21,085	21,688
Zone 5 - Attleborough	21,203	21,918	22,579	23,936	25,606	27,102	28,459
Zone 6 - SE Breckland	11,742	12,138	12,236	12,437	12,684	12,906	13,107
Total	168,175	173,845	176,294	181,320	187,505	193,047	198,073

Sources: *Experian 2011 Census of Population and ONS 2014 based Projections*

Table 2: Convenience Goods Expenditure per person (£)

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	1,774	1,781	1,827	1,891	1,957	2,037
Zone 2 - Dereham	1,950	1,957	2,007	2,078	2,151	2,238
Zone 3 - Swaffham	1,926	1,933	1,982	2,052	2,124	2,211
Zone 4 - Watton	1,805	1,812	1,858	1,924	1,991	2,072
Zone 5 - Attleborough	1,929	1,937	1,986	2,056	2,129	2,215
Zone 6 - South East Breckland	2,143	2,151	2,206	2,283	2,364	2,460

Sources: *Experian Local Expenditure 2015 (2015 prices)*
 Growth Rates: 0% 2015-2016, -0.2% 2016-2017, -0.91% 2017-2018, 0% 2019 to 2023 and 0.1% p.a. from 2023
 Excludes Special Forms of Trading

Table 3: Total Convenience Goods Expenditure (£m)

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	102.68	104.38	109.81	117.18	124.56	132.69
Zone 2 - Dereham	89.62	90.68	94.52	99.77	105.07	111.02
Zone 3 - Swaffham	33.06	33.76	35.82	38.60	41.37	44.39
Zone 4 - Watton	33.90	34.56	36.57	39.28	41.99	44.94
Zone 5 - Attleborough	42.29	43.73	47.55	52.65	57.69	63.04
Zone 6 - South East Breckland	26.01	26.32	27.43	28.96	30.51	32.24
Total	327.56	333.43	351.69	376.45	401.18	428.33

Source: *Tables 1 and 2*

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

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

Source: NEMS Household Survey March 2014

Table 5: Base Year 2015 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2015	102.68	89.62	33.06	33.90	42.29	26.01		327.56
Sainsbury's, Thetford	17.25	0.36	0.17	0.24	0.85	1.48	2.26	22.60
Tesco, Kilverstne, Thetford	23.62	0.27	0.00	1.46	2.83	3.17	3.48	34.83
Other Thetford	24.64	0.00	0.03	1.39	0.55	1.38	3.11	31.11
Thetford Sub-Total	65.51	0.63	0.20	3.08	4.23	6.03	8.85	88.54
Morrison's, Dereham	0.10	29.57	1.42	2.92	1.27	0.00	1.86	37.14
Tesco, Dereham	0.31	27.60	2.02	4.34	0.76	0.00	1.84	36.87
Other Dereham	0.00	15.77	0.86	2.14	0.08	0.00	0.99	19.85
Dereham Sub-Total	0.41	72.95	4.30	9.39	2.11	0.00	4.69	93.86
Waitrose, Swaffham	0.31	1.17	4.93	0.68	0.00	0.00	1.25	8.33
Tesco, Swaffham	0.31	0.00	9.06	1.02	0.21	0.00	1.87	12.47
Other Swaffham	0.21	0.27	7.97	0.88	0.00	0.00	1.04	10.36
Swaffham Sub-Total	0.82	1.43	21.95	2.58	0.21	0.00	4.15	31.15
Tesco, Watton	1.44	0.09	0.00	13.39	0.93	0.05	0.32	16.22
Other Watton	0.10	0.00	0.00	3.22	0.00	0.00	0.07	3.39
Watton Sub-Total	1.54	0.09	0.00	16.61	0.93	0.05	0.39	19.62
Sansbury's, Attleborough	0.10	0.45	0.00	0.00	18.40	1.95	1.10	22.00
Other Attleborough	0.00	0.00	0.00	0.07	7.78	1.35	0.48	9.69
Attleborough Sub-Total	0.10	0.45	0.00	0.07	26.18	3.30	1.58	31.68
Local Shops in Breckland	0.21	1.88	0.36	1.19	0.72	2.86	0.15	7.36
Breckland DC Total	68.59	77.43	26.81	32.92	34.38	12.25	19.83	272.21
Outside Breckland DC	34.09	12.19	6.25	0.98	7.91	13.76	n/a	75.18
TOTAL	102.68	89.62	33.06	33.90	42.29	26.01	n/a	347.39

Source: Table 3 and 4

Table 6: Current 2017 Convenience Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2017	104.38	90.68	33.76	34.56	43.73	26.32		333.43
Thetford	66.60	0.63	0.20	3.15	4.37	6.11	9.01	90.06
Dereham	0.42	73.81	4.39	9.57	2.19	0.00	4.76	95.14
Swaffham	0.84	1.45	22.41	2.63	0.22	0.00	4.86	32.41
Watton	1.57	0.09	0.00	16.94	0.96	0.05	0.40	20.01
Attleborough	0.10	0.45	0.00	0.07	27.07	3.34	3.45	34.49
Local Shops in Breckland	0.21	1.90	0.37	1.21	0.74	2.89	0.15	7.48
Breckland DC Total	69.73	78.35	27.38	33.56	35.55	12.40	22.62	279.59
Outside Breckland DC	34.65	12.33	6.38	1.00	8.18	13.92	n/a	76.47
TOTAL	104.38	90.68	33.76	34.56	43.73	26.32	n/a	356.06

Source: Table 3 and 4

Table 7: Future Convenience Goods Market Shares (%)

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

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

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	109.81	94.52	35.82	36.57	47.55	27.43		351.69
Thetford	75.66	0.76	0.36	3.99	3.80	6.58	10.13	101.27
Dereham	0.33	76.46	3.94	9.73	1.90	0.00	4.86	97.22
Swaffham	1.10	1.89	25.07	2.93	0.24	0.00	5.51	36.73
Watton	1.54	0.09	0.00	17.08	0.95	0.05	0.40	20.12
Attleborough	0.11	0.47	0.00	0.55	31.86	5.49	4.27	42.75
Local Shops in Breckland	0.22	1.98	0.39	1.28	0.81	2.61	0.15	7.44
Breckland DC Total	78.95	81.66	29.76	35.54	39.56	14.73	25.32	305.54
Outside Breckland DC	30.86	12.85	6.05	1.02	7.99	12.70	n/a	71.48
TOTAL	109.81	94.52	35.82	36.57	47.55	27.43	n/a	377.01

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	117.18	99.77	38.60	39.28	52.65	28.96		376.45
Thetford	80.74	0.80	0.39	4.28	4.21	6.95	10.82	108.19
Dereham	0.35	80.71	4.25	10.45	2.11	0.00	5.15	103.02
Swaffham	1.17	2.00	27.02	3.14	0.26	0.00	5.93	39.52
Watton	1.64	0.10	0.00	18.35	1.05	0.06	0.43	21.63
Attleborough	0.12	0.50	0.00	0.59	35.28	5.79	4.70	46.97
Local Shops in Breckland	0.23	2.10	0.42	1.37	0.90	2.75	0.16	7.93
Breckland DC Total	84.25	86.20	32.08	38.18	43.81	15.55	27.19	327.26
Outside Breckland DC	32.93	13.57	6.52	1.10	8.85	13.41	n/a	76.38
TOTAL	117.18	99.77	38.60	39.28	52.65	28.96	n/a	403.64

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	124.56	105.07	41.37	41.99	57.69	30.51		401.18
Thetford	85.82	0.84	0.41	4.58	4.62	7.32	11.51	115.10
Dereham	0.37	85.00	4.55	11.17	2.31	0.00	5.44	108.84
Swaffham	1.25	2.10	28.96	3.36	0.29	0.00	6.34	42.30
Watton	1.74	0.11	0.00	19.61	1.15	0.06	0.46	23.14
Attleborough	0.12	0.53	0.00	0.63	38.65	6.10	5.11	51.15
Local Shops in Breckland	0.25	2.21	0.46	1.47	0.98	2.90	0.17	8.43
Breckland DC Total	89.56	90.78	34.38	40.81	48.00	16.38	29.04	348.95
Outside Breckland DC	35.00	14.29	6.99	1.18	9.69	14.12	n/a	81.27
TOTAL	124.56	105.07	41.37	41.99	57.69	30.51	n/a	430.22

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	132.69	111.02	44.39	44.94	63.04	32.24		428.33
Thetford	91.42	0.89	0.44	4.90	5.04	7.74	12.27	122.71
Dereham	0.40	89.82	4.88	11.96	2.52	0.00	5.77	115.34
Swaffham	1.33	2.22	31.07	3.60	0.32	0.00	6.80	45.33
Watton	1.86	0.11	0.00	20.99	1.26	0.06	0.50	24.78
Attleborough	0.13	0.56	0.00	0.67	42.24	6.45	5.56	55.61
Local Shops in Breckland	0.27	2.33	0.49	1.57	1.07	3.06	0.18	8.97
Breckland DC Total	95.40	95.92	36.88	43.69	52.45	17.31	31.07	372.74
Outside Breckland DC	37.29	15.10	7.50	1.26	10.59	14.93	n/a	86.66
TOTAL	132.69	111.02	44.39	44.94	63.04	32.24	n/a	459.40

Source: Table 3 and 7

Table 12: Base Year Convenience Goods Floorspace and Benchmark Turnover

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover Density (£ per sq.m)	Total Turnover (£m)
Zone 1 Thetford	Aldi, Thetford	900	85%	765	£11,557	£8.84
	Iceland, Thetford	377	98%	369	£8,045	£2.97
	Sainsbury, Thetford	4,151	55%	2,283	£11,690	£26.69
	Farm Foods, Thetford	400	100%	400	£7,000	£2.80
	Tesco Express, Thetford	157	98%	154	£11,058	£1.70
	Tesco, Kilverstone Lane, Thetford	4,441	65%	2,887	£11,058	£31.92
	Lidl, Thetford	918	80%	734	£7,723	£5.67
	Other town centre	596	98%	584	£5,000	£2.92
	Sub-Total	11,940		8,177		£83.52
Zone 2 Dereham	Co-op, Market Place, Dereham	291	98%	285	£8,903	£2.54
	Iceland, East Dereham	379	98%	371	£8,045	£2.99
	Morrisons, East Dereham	4,061	80%	3,249	£10,849	£35.25
	Roys of Wroxham (conv. only)	250	100%	250	£5,000	£1.25
	Tesco, Dereham	6,846	55%	3,765	£11,058	£41.64
	Co-op, Shipdham Road, Dereham	143	98%	140	£8,903	£1.25
	Lidl, Dereham	1,045	80%	836	£7,723	£6.46
	Other town centre	352	100%	352	£5,000	£1.76
	Sub-Total	13,367		9,249		£93.12
Zone 3 Swaffham	Co-op, Swaffham	466	95%	443	£8,903	£3.94
	Asda, Swaffham	968	90%	871	£15,213	£13.25
	Iceland, Swaffham	435	98%	426	£8,903	£3.80
	Other town centre	816	100%	816	£5,000	£4.08
	Waitrose, Swaffham	2,080	85%	1,768	£11,665	£20.62
	Tesco, Swaffham	2,129	80%	1,703	£11,058	£18.83
	Sub-Total	6,894		6,027		£64.53
Zone 4 Watton	Tesco, Watton	1,862	75%	1,397	£11,058	£15.44
	Other town centre	749	100%	749	£5,000	£3.75
	Sub-Total	2,611		2,146		£19.19
Zone 5 Attleborough	Lidl, Attleborough	1,046	80%	837	£7,723	£6.46
	Sainsbury, Attleborough	1,565	90%	1,409	£11,690	£16.47
	Other town centre	469	100%	469	£5,000	£2.35
	Sub-Total	3,080		2,714		£25.27
Breckland DC Total		37,892		28,313	£10,088	£285.63

Source: ORC Storepoint 2017, Breckland Land Use Survey (2014)

Table 13: Summary of Convenience Goods Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
Available Expenditure in Breckland (£m)						
Thetford	88.54	90.06	101.27	108.19	115.10	122.71
Dereham	93.86	95.14	97.22	103.02	108.84	115.34
Swaffham	31.15	32.41	36.73	39.52	42.30	45.33
Watton	19.62	20.01	20.12	21.63	23.14	24.78
Attleborough	31.68	34.49	42.75	46.97	51.15	55.61
Other Breckland	7.36	7.48	7.44	7.93	8.43	8.97
Total	272.21	279.59	305.54	327.26	348.95	372.74
Turnover of Existing Facilities (£m)						
Thetford (1)	83.52	83.52	112.89	112.89	112.89	112.89
Dereham	93.12	93.12	93.12	93.12	93.12	93.12
Swaffham	64.53	64.53	64.53	64.53	64.53	64.53
Watton	19.19	19.19	19.19	19.19	19.19	19.19
Attleborough (2)	25.27	25.27	43.93	43.93	43.93	43.93
Other Breckland	7.36	7.36	7.36	7.36	7.36	7.36
Total	292.99	292.99	341.02	341.02	341.02	341.02
Surplus/Deficit Expenditure (£m)						
Thetford	5.02	6.55	-11.61	-4.70	2.21	9.82
Dereham	0.73	2.01	4.10	9.89	15.72	22.22
Swaffham	-33.38	-32.12	-27.79	-25.01	-22.23	-19.20
Watton	0.43	0.82	0.93	2.44	3.95	5.59
Attleborough	6.41	9.22	-1.18	3.04	7.22	11.68
Other Breckland	0.00	0.12	0.08	0.57	1.06	1.61
Total	-20.78	-13.41	-35.49	-13.76	7.92	31.71

Source: Tables 5 to 12

(1) food store at Thetford Enterprise Park (2,578 sq.m net - £29.37 million) added at 2021

(2) food store at Banham Poultry site (1,638 sq.m net - £18.66 million) added at 2021

Table 14: Convenience Goods Floorspace Expenditure Capacity 2017 to 2036

Centre	2017	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)					
	£11,394	£11,394	£11,394	£11,394	£11,394
Floorspace Requirement (sq.m net)					
Thetford	575	-1,019	-412	194	862
Dereham	177	360	868	1,379	1,950
Swaffham	-2,819	-2,439	-2,195	-1,951	-1,685
Watton	72	82	214	346	491
Attleborough	809	-104	267	633	1,025
Other Breckland	10	7	50	93	141
Total	-1,177	-3,114	-1,208	696	2,783
Floorspace Requirement (sq.m gross)					
Thetford	821	-1,456	-589	277	1,231
Dereham	253	514	1,240	1,971	2,786
Swaffham	-4,027	-3,485	-3,135	-2,787	-2,407
Watton	103	117	306	495	701
Attleborough	1,155	-148	381	905	1,464
Other Breckland	15	10	71	133	202
Total	-1,681	-4,449	-1,725	994	3,976

Source: Table 13

Appendix 3: Comparison Assessment

Table 1: Study Area Population

Zone	2011	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,874	58,608	60,116	61,972	63,634	65,142
Zone 2 - Dereham	44,466	45,965	46,333	47,086	48,014	48,845	49,599
Zone 3 - Swaffham	16,610	17,170	17,464	18,067	18,809	19,474	20,077
Zone 4 -Watton	18,168	18,781	19,074	19,677	20,420	21,085	21,688
Zone 5 - Attleborough	21,203	21,918	22,579	23,936	25,606	27,102	28,459
Zone 6 - South East Breckland	11,742	12,138	12,236	12,437	12,684	12,906	13,107
Total	168,175	173,845	176,294	181,320	187,505	193,047	198,073

Sources: Experian 2011 Census of Population and ONS 2014 Projections

Table 2: Comparison Goods Expenditure per person (£)

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	2,417	2,480	2,680	3,107	3,628	4,237
Zone 2 - Dereham	2,934	3,010	3,253	3,771	4,403	5,142
Zone 3 - Swaffham	2,754	2,825	3,053	3,539	4,133	4,826
Zone 4 -Watton	2,730	2,801	3,027	3,508	4,097	4,784
Zone 5 - Attleborough	2,881	2,956	3,194	3,703	4,324	5,049
Zone 6 - SE Breckland	3,276	3,362	3,633	4,211	4,917	5,742

Sources: Experian Local Expenditure 2015 (2015 prices)
 Growth Rates: 3.3% 2015-2016, 1.4% 2016-2017, 1% 2017-2018, 3% p.a. 2018 to 2023 and 3.2% p.a. from 2024
 Excludes Special Forms of Trading

Table 3: Total Comparison Goods Expenditure (£m)

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	139.90	145.37	161.12	192.53	230.86	275.99
Zone 2 - Dereham	134.86	139.48	153.17	181.04	215.08	255.04
Zone 3 - Swaffham	47.28	49.34	55.16	66.56	80.48	96.89
Zone 4 -Watton	51.27	53.42	59.56	71.64	86.38	103.76
Zone 5 - Attleborough	63.15	66.75	76.46	94.81	117.19	143.70
Zone 6 - SE Breckland	39.77	41.13	45.18	53.41	63.46	75.26
Total	476.22	495.48	550.65	659.99	793.45	950.64

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey July 2014

Table 5: Base Year 2015 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2015	139.90	134.86	47.28	51.27	63.15	39.77		476.22
Thetford	57.78	0.13	0.43	1.74	7.64	4.93	3.82	76.48
Dereham	0.84	63.11	8.23	13.64	2.46	0.00	4.65	92.93
Swaffham	0.56	0.94	8.23	1.33	0.00	0.00	0.58	11.65
Watton	1.82	0.40	0.28	12.61	1.26	0.08	0.34	16.80
Attleborough	0.28	0.27	0.00	0.05	10.74	2.51	0.73	14.57
Other Breckland	0.14	0.54	0.14	0.10	0.13	0.68	0.04	1.76
Breckland District Total	61.42	65.41	17.30	29.48	22.23	8.19	10.15	214.18
Outside Breckland DC	78.48	69.45	29.97	21.79	40.92	31.57	n/a	272.19
TOTAL	139.90	134.86	47.28	51.27	63.15	39.77	n/a	486.37

Source: Tables 3 and 4

Table 6: Current 2017 Comparison Goods Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2017	145.37	139.48	49.34	53.42	66.75	41.13		495.48
Thetford	60.04	0.14	0.44	1.82	8.08	5.10	3.98	79.59
Dereham	0.87	65.27	8.59	14.21	2.60	0.00	4.82	96.36
Swaffham	0.58	0.98	8.59	1.39	0.00	0.00	0.61	12.14
Watton	1.89	0.42	0.30	13.14	1.33	0.08	0.35	17.51
Attleborough	0.29	0.28	0.00	0.05	11.35	2.59	0.77	15.33
Other Breckland	0.15	0.56	0.15	0.11	0.13	0.70	0.04	1.83
Breckland District Total	63.82	67.65	18.06	30.72	23.49	8.47	10.56	222.76
Outside Breckland DC	81.55	71.83	31.28	22.71	40.18	32.04	n/a	279.59
TOTAL	145.37	139.48	49.34	53.42	63.68	40.51	n/a	502.35

Source: Tables 3 and 4

Table 7: Future Comparison Goods Market Shares (%)

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

Source: NEMS Household Survey July 2014 with NLP adjustments

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	161.12	153.17	55.16	59.56	76.46	45.18		550.65
Thetford	66.54	0.15	0.50	2.02	8.41	5.56	4.38	87.56
Dereham	0.97	71.68	9.60	15.84	2.75	0.00	5.31	106.15
Swaffham	0.64	1.07	9.60	1.55	0.00	0.00	0.68	13.54
Watton	2.09	0.46	0.33	14.65	1.53	0.09	0.39	19.55
Attleborough	0.32	0.31	0.00	0.06	17.59	3.61	1.15	23.04
Other Breckland	0.16	0.61	0.17	0.12	0.15	0.72	0.04	1.97
Breckland District Total	70.73	74.29	20.19	34.24	30.43	9.98	11.95	251.81
Outside Breckland DC	90.39	78.88	34.97	25.31	46.03	35.19	n/a	310.78
TOTAL	161.12	153.17	55.16	59.56	76.46	45.18	n/a	562.59

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	192.53	181.04	66.56	71.64	94.81	53.41		659.99
Thetford	79.51	0.18	0.60	2.44	10.43	6.57	5.25	104.98
Dereham	1.16	84.73	11.58	19.06	3.41	0.00	6.31	126.25
Swaffham	0.77	1.27	11.58	1.86	0.00	0.00	0.81	16.30
Watton	2.50	0.54	0.40	17.62	1.90	0.11	0.47	23.54
Attleborough	0.39	0.36	0.00	0.07	21.81	4.27	1.42	28.31
Other Breckland	0.19	0.72	0.20	0.14	0.19	0.85	0.05	2.35
Breckland District Total	84.52	87.81	24.36	41.19	37.74	11.80	14.31	301.73
Outside Breckland DC	108.01	93.24	42.20	30.45	57.08	41.60	n/a	372.58
TOTAL	192.53	181.04	66.56	71.64	94.81	53.41	n/a	674.30

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	230.86	215.08	80.48	86.38	117.19	63.46		793.45
Thetford	95.35	0.22	0.72	2.94	12.89	7.81	6.31	126.23
Dereham	1.39	100.66	14.00	22.98	4.22	0.00	7.54	150.78
Swaffham	0.92	1.51	14.00	2.25	0.00	0.00	0.98	19.66
Watton	3.00	0.65	0.48	21.25	2.34	0.13	0.57	28.42
Attleborough	0.46	0.43	0.00	0.09	26.95	5.08	1.74	34.75
Other Breckland	0.23	0.86	0.24	0.17	0.23	1.02	0.06	2.81
Breckland District Total	101.35	104.31	29.45	49.67	46.64	14.02	17.20	362.65
Outside Breckland DC	129.52	110.77	51.02	36.71	70.55	49.43	n/a	448.00
TOTAL	230.86	215.08	80.48	86.38	117.19	63.46	n/a	810.65

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	275.99	255.04	96.89	103.76	143.70	75.26		950.64
Thetford	113.98	0.26	0.87	3.53	15.81	9.26	7.56	151.26
Dereham	1.66	119.36	16.86	27.60	5.17	0.00	8.98	179.63
Swaffham	1.10	1.79	16.86	2.70	0.00	0.00	1.18	23.63
Watton	3.59	0.77	0.58	25.52	2.87	0.15	0.68	34.17
Attleborough	0.55	0.51	0.00	0.10	33.05	6.02	2.12	42.36
Other Breckland	0.28	1.02	0.29	0.21	0.29	1.20	0.07	3.35
Breckland District Total	121.16	123.69	35.46	59.66	57.19	16.63	20.59	434.40
Outside Breckland DC	154.83	131.35	61.43	44.10	86.51	58.63	n/a	536.84
TOTAL	275.99	255.04	96.89	103.76	143.70	75.26	n/a	971.24

Source: Tables 3 and 7

Table 12: Base Year Comparison Goods Floorspace

Zone	Store	Gross Floorspace (sq.m)	Sales Floorspace (sq.m net)
Zone 1 Thetford	Thetford town centre	10,979	6,587
	Thetford Retail Park, Lime Kiln	1,500	1,275
	Forest Retail Park	6,900	5,865
	Other retail warehouses/garden centres	2,800	2,380
	Comparison sales in food stores	n/a	3,764
	Sub-Total	22,179	19,871
Zone 2 Dereham	Dereham town centre	17,853	10,712
	Retail warehouses	10,900	9,265
	Comparison sales in food stores	n/a	4,118
	Sub-Total	28,753	24,095
Zone 3 Swaffham	Swaffham town centre	4,557	2,734
	Comparison sales in food stores	n/a	867
	Sub-Total	4,557	3,601
Zone 4 Watton	Watton town centre	4,401	2,641
	Comparison sales in food stores	n/a	466
	Sub-Total	4,401	3,107
Zone 5 Attleborough	Attleborough town centre	5,074	3,044
	Comparison sales in food stores	n/a	366
	Sub-Total	5,074	3,410
Breckland DC Total		64,964	54,084

Source: ORC Storepoint 2017, VOA, Breckland Land Use Survey (2014) and NLP site survey 2014

Table 13: Summary of Comparison Goods Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
Available Expenditure (£m)						
Thetford	76.48	79.59	87.56	104.98	126.23	151.26
Dereham	92.93	96.36	106.15	126.25	150.78	179.63
Swaffham	11.65	12.14	13.54	16.30	19.66	23.63
Watton	16.80	17.51	19.55	23.54	28.42	34.17
Attleborough	14.57	15.33	23.04	28.31	34.75	42.36
Other Breckland	1.76	1.83	1.97	2.35	2.81	3.35
Breckland District Total	214.18	222.76	251.81	301.73	362.65	434.40
Turnover of Existing Facilities (£m)						
Thetford (1)	76.48	79.57	92.14	101.73	112.31	124.00
Dereham	92.93	96.68	104.65	115.54	127.57	140.84
Swaffham	11.65	12.12	13.11	14.48	15.99	17.65
Watton	16.80	17.48	18.92	20.88	23.06	25.46
Attleborough (2) (3)	14.57	15.16	24.62	27.18	30.01	33.13
Other Breckland	1.76	1.83	1.98	2.19	2.42	2.67
Breckland District Total	214.18	222.83	255.42	282.00	311.35	343.76
Surplus/Deficit Expenditure (£m)						
Thetford	n/a	0.02	-4.57	3.25	13.92	27.26
Dereham	n/a	-0.32	1.50	10.71	23.21	38.78
Swaffham	n/a	0.02	0.43	1.82	3.67	5.98
Watton	n/a	0.04	0.63	2.66	5.36	8.71
Attleborough	n/a	0.17	-1.58	1.13	4.74	9.22
Other Breckland	n/a	-0.01	-0.01	0.16	0.39	0.68
Total	n/a	-0.07	-3.60	19.73	51.30	90.64

Source: Tables 5 to 11

(1) food store at Thetford Enterprise Park (859 sq.m net - £6.01 million) added at 2021

(2) food store at Banham Poultry site (702 sq.m net - £4.91 million) added at 2021

(3) bulky goods stores at Banham Poultry site (1,200 sq.m net - £3.3 million) added at 2021

Table 14: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036

Centre	2017	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,100	£5,520	£6,095	£6,729	£7,430
Floorspace Requirement (sq.m net)					
Thetford	5	-828	533	2,068	3,669
Dereham	-62	272	1,756	3,450	5,220
Swaffham	5	77	298	546	804
Watton	8	114	436	796	1,172
Attleborough	33	-286	186	704	1,242
Other Breckland	-1	-2	26	58	92
Total	-13	-653	3,236	7,623	12,199
Floorspace Requirement (sq.m gross)					
Thetford	6	-1,104	711	2,757	4,892
Dereham	-83	362	2,342	4,600	6,960
Swaffham	6	103	398	728	1,073
Watton	10	152	581	1,062	1,563
Attleborough	44	-381	248	939	1,655
Other Breckland	-1	-2	35	78	123
Total	-17	-870	4,315	10,164	16,266

Source: Table 13

Appendix 4: Food/Beverage Assessment

Table 1: Study Area Population

Zone	2011	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	55,986	57,874	58,608	60,116	61,972	63,634	65,142
Zone 2 - Dereham	44,466	45,965	46,333	47,086	48,014	48,845	49,599
Zone 3 - Swaffham	16,610	17,170	17,464	18,067	18,809	19,474	20,077
Zone 4 -Watton	18,168	18,781	19,074	19,677	20,420	21,085	21,688
Zone 5 - Attleborough	21,203	21,918	22,579	23,936	25,606	27,102	28,459
Zone 6 - South East Breckland	11,742	12,138	12,236	12,437	12,684	12,906	13,107
Total	168,175	173,845	176,294	181,320	187,505	193,047	198,073

Sources: Experian 2011 Census of Population and ONS 2014 Projections

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

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	847	867	903	969	1,044	1,125
Zone 2 - Dereham	1,015	1,039	1,083	1,162	1,252	1,348
Zone 3 - Swaffham	963	986	1,027	1,102	1,187	1,279
Zone 4 -Watton	943	966	1,006	1,079	1,163	1,253
Zone 5 - Attleborough	1,006	1,030	1,073	1,151	1,240	1,336
Zone 6 - South East Breckland	1,120	1,147	1,195	1,282	1,381	1,488

Sources: Experian Local Expenditure 2015 (2015 prices)
 Growth Rates: 1.9% 2015-2016, 0.5% 2016-2017, 0.2% 2017-2018, 1.3% p.a. 2018 to 2023 and 1.5% p.a. from 2024

Table 3: Total FAB Expenditure (£m)

Zone	2014	2017	2021	2026	2031	2036
Zone 1 - Thetford	49.02	50.84	54.31	60.08	66.46	73.29
Zone 2 - Dereham	46.65	48.16	50.98	55.78	61.13	66.87
Zone 3 - Swaffham	16.53	17.22	18.56	20.73	23.12	25.68
Zone 4 -Watton	17.71	18.42	19.79	22.04	24.52	27.17
Zone 5 - Attleborough	22.05	23.26	25.69	29.48	33.62	38.03
Zone 6 - South East Breckland	13.59	14.03	14.86	16.26	17.82	19.50
Total	165.56	171.94	184.19	204.38	226.68	250.55

Source: Tables 1 and 2

Table 4: Base Year 2015 FAB Market Shares (%)

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

Source: NEMS Household Survey July 2014

Table 5: Base Year 2015 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2015	49.02	46.65	16.53	17.71	22.05	13.59		165.56
Thetford	19.80	0.23	0.00	1.13	0.15	0.04	1.12	22.49
Dereham	0.10	20.11	1.90	1.70	0.15	0.00	1.26	25.22
Swaffham	0.44	0.09	3.79	0.11	0.00	0.00	0.09	4.52
Watton	0.29	0.37	0.00	3.22	0.00	0.10	0.08	4.07
Attleborough	0.74	1.03	0.00	0.12	8.78	1.71	0.25	12.63
Other Breckland	1.72	2.47	1.59	1.97	1.65	1.63	0.23	11.25
Breckland District Total	23.09	24.31	7.28	8.25	10.74	3.48	3.03	80.18
Outside Breckland DC	25.93	22.35	9.26	9.46	11.31	10.11	n/a	88.42
TOTAL	49.02	46.65	16.53	17.71	22.05	13.59	n/a	168.60

Source: Tables 3 and 4

Table 6: Current 2017 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2017	50.84	48.16	17.22	18.42	23.26	14.03		171.94
Thetford	20.54	0.24	0.00	1.18	0.16	0.04	1.17	23.33
Dereham	0.10	20.76	1.98	1.77	0.16	0.00	1.30	26.07
Swaffham	0.46	0.10	3.94	0.11	0.00	0.00	0.09	4.70
Watton	0.31	0.39	0.00	3.35	0.00	0.10	0.08	4.23
Attleborough	0.76	1.06	0.00	0.13	9.26	1.77	0.26	13.24
Other Breckland	1.78	2.55	1.65	2.04	1.74	1.68	0.23	11.69
Breckland District Total	23.94	25.09	7.58	8.58	11.33	3.59	3.15	83.27
Outside Breckland DC	26.89	23.07	9.64	9.84	11.93	10.44	n/a	91.82
TOTAL	50.84	48.16	17.22	18.42	23.26	14.03	n/a	175.08

Source: Tables 3 and 4

Table 7: Future 2021 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2021	54.31	50.98	18.56	19.79	25.69	14.86		184.19
Thetford	21.94	0.25	0.00	1.27	0.18	0.04	1.25	24.94
Dereham	0.11	21.97	2.13	1.90	0.18	0.00	1.38	27.68
Swaffham	0.49	0.10	4.25	0.12	0.00	0.00	0.10	5.06
Watton	0.33	0.41	0.00	3.60	0.00	0.10	0.09	4.53
Attleborough	0.81	1.12	0.00	0.14	10.22	1.87	0.29	14.46
Other Breckland	1.90	2.70	1.78	2.20	1.93	1.78	0.25	12.54
Breckland District Total	25.58	26.56	8.17	9.22	12.51	3.80	3.36	89.21
Outside Breckland DC	28.73	24.42	10.39	10.57	13.18	11.05	n/a	98.34
TOTAL	54.31	50.98	18.56	19.79	25.69	14.86	n/a	187.55

Source: Tables 3 and 4

Table 8: Future 2026 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2026	60.08	55.78	20.73	22.04	29.48	16.26		204.38
Thetford	24.27	0.28	0.00	1.41	0.21	0.05	1.38	27.60
Dereham	0.12	24.04	2.38	2.12	0.21	0.00	1.52	30.39
Swaffham	0.54	0.11	4.75	0.13	0.00	0.00	0.11	5.65
Watton	0.36	0.45	0.00	4.01	0.00	0.11	0.10	5.03
Attleborough	0.90	1.23	0.00	0.15	11.73	2.05	0.33	16.39
Other Breckland	2.10	2.96	1.99	2.45	2.21	1.95	0.28	13.94
Breckland District Total	28.30	29.06	9.12	10.27	14.36	4.16	3.72	98.99
Outside Breckland DC	31.78	26.72	11.61	11.77	15.13	12.10	n/a	109.10
TOTAL	60.08	55.78	20.73	22.04	29.48	16.26	n/a	208.10

Source: Tables 3 and 4

Table 9: Future 2031 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2031	66.46	61.13	23.12	24.52	33.62	17.82		226.68
Thetford	26.85	0.31	0.00	1.57	0.24	0.05	1.53	30.54
Dereham	0.13	26.35	2.66	2.35	0.24	0.00	1.67	33.40
Swaffham	0.60	0.12	5.30	0.15	0.00	0.00	0.13	6.29
Watton	0.40	0.49	0.00	4.46	0.00	0.12	0.11	5.59
Attleborough	1.00	1.34	0.00	0.17	13.38	2.25	0.37	18.51
Other Breckland	2.33	3.24	2.22	2.72	2.52	2.14	0.31	15.48
Breckland District Total	31.30	31.85	10.17	11.42	16.37	4.56	4.11	109.80
Outside Breckland DC	35.16	29.28	12.95	13.09	17.25	13.26	n/a	120.99
TOTAL	66.46	61.13	23.12	24.52	33.62	17.82	n/a	230.79

Source: Tables 3 and 4

Table 10: Future 2036 FAB Expenditure (£m)

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
Expenditure 2036	73.29	66.87	25.68	27.17	38.03	19.50		250.55
Thetford	29.61	0.33	0.00	1.74	0.27	0.06	1.68	33.69
Dereham	0.15	28.82	2.95	2.61	0.27	0.00	1.83	36.63
Swaffham	0.66	0.13	5.88	0.16	0.00	0.00	0.14	6.98
Watton	0.44	0.53	0.00	4.94	0.00	0.14	0.12	6.18
Attleborough	1.10	1.47	0.00	0.19	15.14	2.46	0.42	20.77
Other Breckland	2.57	3.54	2.47	3.02	2.85	2.34	0.34	17.13
Breckland District Total	34.52	34.84	11.30	12.66	18.52	4.99	4.54	121.37
Outside Breckland DC	38.77	32.03	14.38	14.51	19.51	14.51	n/a	133.71
TOTAL	73.29	66.87	25.68	27.17	38.03	19.50	n/a	255.08

Source: Tables 3 and 4

Table 11: Town Centre Food and Drink Units/Floorspace

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

Source: Breckland Land Use Survey 2014

Table 12: Summary of FAB Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
Available Expenditure (£m)						
Thetford	22.49	23.33	24.94	27.60	30.54	33.69
Dereham	25.22	26.07	27.68	30.39	33.40	36.63
Swaffham	4.52	4.70	5.06	5.65	6.29	6.98
Watton	4.07	4.23	4.53	5.03	5.59	6.18
Attleborough	12.63	13.24	14.46	16.39	18.51	20.77
Other Breckland	11.25	11.69	12.54	13.94	15.48	17.13
Breckland District Total	80.18	83.27	89.21	98.99	109.80	121.37
Turnover of Existing Facilities (£m)						
Thetford	22.49	22.94	24.11	25.34	26.64	27.99
Dereham	25.22	25.73	27.04	28.42	29.87	31.40
Swaffham	4.52	4.61	4.84	5.09	5.35	5.62
Watton	4.07	4.15	4.36	4.58	4.82	5.06
Attleborough	12.63	12.88	13.54	14.23	14.95	15.72
Other Breckland	11.25	11.48	12.06	12.68	13.33	14.01
Breckland District Total	80.18	81.79	85.96	90.34	94.95	99.80
Surplus Expenditure (£m)						
Thetford	n/a	0.39	0.82	2.25	3.91	5.70
Dereham	n/a	0.34	0.64	1.97	3.53	5.23
Swaffham	n/a	0.09	0.22	0.55	0.94	1.35
Watton	n/a	0.08	0.17	0.45	0.77	1.12
Attleborough	n/a	0.36	0.92	2.17	3.56	5.05
Other Breckland	n/a	0.21	0.48	1.26	2.15	3.12
Total	n/a	1.48	3.25	8.65	14.85	21.58

Source: Tables 5 to 10

Table 13: Food and Beverage Floorspace Expenditure Capacity 2016 to 2036

Centre	2017	2021	2026	2031	2036
Turnover Density New Floorspace (£ per sq.m)	£5,100	£5,307	£5,578	£5,862	£6,161
Floorspace Requirement (sq.m gross)					
Thetford	76	155	404	666	925
Dereham	67	120	352	602	849
Swaffham	18	41	99	160	220
Watton	15	32	81	131	181
Attleborough	71	174	388	607	820
Other Breckland	42	90	226	367	506
Total	290	612	1,551	2,533	3,502

Source: Table 12

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