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Planning Design Economics

Breckland Retail and Town Centre Study

Breckland Council

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Contents

1.0 Introduction

1.1 Nathaniel Lichfield and Partners (NLP) was commissioned by Breckland Council to prepare a Retail and Town Centre Study. This study provides a review and update of the Retail and Town Centre Study in 2004 and the subsequent update of this Study in 2007, both prepared by NLP.

1.2 The key objective of the Retail and Town Centre Study will be to provide a robust and credible evidence base to inform the Council's work on the next stages of the Local Development Framework process, taking into account changes since the previous studies. The objectives of the study will be to:

- assess the future need and (residual) capacity for retail, distributed by town centre for the period up to 2026;
- assess the existing supply and demand for retail uses and the role played by each of the centres;
- review the existing retail hierarchy and identify any deficiencies in the network including, where appropriate, the scope for extending the primary shopping area and/or town centre;
- assess the implications of the planned scale of population growth;
- identify, where appropriate, the scope and implications for accommodating potential growth and meeting the identified need; and provide advice on policies to be included in LDF documents to address future needs.

1.3 Section 2.0 provides an overview of retail and commercial leisure trends. Section 3.0 provides an overview of the national and local planning policy context. Section 4.0 provides a description of the shopping hierarchy.

1.4 Section 5.0 summarises the results of the household shopper survey. Sections 6.0 to 10.0 provide updated town centre health checks for Thetford, Dereham, Attleborough, Swaffham and Watton.

1.5 Sections 11.0 and 12.0 set out an analysis of shopping and commercial leisure needs within Breckland. Section 13.0 assesses the opportunities to accommodate the future need for new retail and leisure development. Section 14.0 provides review of current policy, and Section 15.0 sets out recommendations and conclusions.

2.0 Retail and Commercial Leisure Trends

2.1 An assessment of the need for retail and leisure facilities in Breckland is set out in Sections 11 and 12 of this report. In the section below, we provide an overview of trends within the retail and leisure sectors.

Retail Trends

2.2 Past retail trends indicate that expenditure has consistently grown in real terms in the past, generally following a cyclical growth trend. The underlying trend shows consistent growth and this trend is expected to continue in the future. However, the current economic downturn is expected to lead to limited growth over the next few years.

2.3 In the past expenditure growth has fuelled the growth in retail floorspace, including major out-of-centre development particularly in the 1980s and 1990s. The economic downturn suggests that recent rates of growth during the past few years are unlikely to be achieved in the short term. However, the underlying trend over the medium and long terms is expected to lead to a need for further retail floorspace. We anticipate these national trends will be mirrored in Breckland.

2.4 New forms of retailing have emerged in recent years as an alternative to more traditional shopping facilities. Home/electronic shopping has also emerged with the increasing growth in the use of personal computers and the Internet. Trends within this sector may well have implications for retailing within Breckland. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Breckland is a relatively affluent area and we would anticipate that the levels of internet connections are high, and therefore growth in home shopping needs to be considered.

2.5 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects and the potential effects on the high street. Experian has recognised the potential impact of retailing on the high street and has provided future projections. Experian's Retail Planning Note 2.3D (Dec 2005) (page 1) states:

"The current scale and scope for the expansion of the selling of retail goods over the internet (e-tailing) has increasingly become an issue in retail planning… A major uncertainty, however, concerns projected growth rates…goods sold over the internet may still come from conventional retail outlets (i.e. sales made over the internet may still be taken from shelves of normal shops), so there is an additional uncertainty over e-tailing's precise impact on current and future space requirements."

2.6 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. For example, extended opening hours and Sunday trading increased significantly in the 1990s. Retailers also responded to stricter planning controls by changing their trading formats. For example, some major food operators have introduced smaller store formats capable of being accommodated within town centres, such as the Tesco Metro, Sainsbury Central/Local store and Marks and Spencer's Simply Foods formats. Food operators have also entered the local convenience store market, for example Tesco Express store and convenience stores linked with petrol filling stations. The entrance of European discount food operators such as Aldi, Lidl and Netto has also been rapid during the last decade, and this trend has been evident in Breckland i.e. Aldi in Thetford, Lidl in Dereham and Netto in Swaffham.

2.7 Food store operators have also commenced a programme of store extensions, particularly Tesco, Sainsbury and Asda. These operators, faced with limited growth in food expenditure, have attempted to increase the sale of non-food products within their food stores, including clothing and electrical goods.

2.8 Comparison retailers have also responded to recent market conditions. The bulky goods retail warehouse sector has rationalised and there have been a number of mergers. For example there are fewer DIY operators, following the acquisition of Do It All, Great Mills and Wickes by Focus DIY. B&Q and Homebase developed very large 'category killer' retail warehouses (some exceeding 10,000 sq m gross), but more recently have scaled down or closed their stores. Other traditional high street retailers have sought large out-of-centre stores, for example Boots, TK Maxx and Poundstretcher. Matalan has also opened numerous discount clothing stores across the country. Sports clothing retail warehouses including JJB Sports and Decathlon have also expanded out-of-centre.

2.9 The economic downturn has had, and is likely to continue to have, an impact on the retail sector, e.g. Woolworth, Borders and MFI are notable victims. Many town centre development schemes have been delayed and the demand from traditional retail warehouse operators has also been affected. Even some of the main food store operators have seen a reduction in growth.

2.10 Within town centres, some high street multiple comparison retailers changed their format. High street national multiples have increasingly sought larger modern shop units (over 200 sq m - 2,150 sq ft) with an increasing polarisation of activity into the larger regional and sub-regional centres. The continuation of these trends may also influence future operator requirements in Breckland. National multiple may prefer to locate in larger centres e.g. Norwich, Cambridge, Bury St Edmunds and Kings Lynn, which may constrain demand in Breckland. Thetford and Dereham will probably have better prospects for attracting multiple retailers than Attleborough, Swaffham and Watton.

Leisure Trends

2.11 The demand for commercial leisure facilities has increased significantly during the last 20 years. The growth in the commercial leisure sector was particularly strong during the late 1980s and again in the mid 1990s. Average household expenditure on leisure services increased in real terms by 93% between 1984 and 1995 (source: Family Expenditure Survey), and by a further 48% between 1995 and 2005. However growth has been more limited since 2005. The latest (2008) average household expenditure on leisure services is nearly £3,400 per annum. However, many analysts consider that the commercial leisure market has now reached saturation in some sub-sectors, e.g. bingo, multiplex cinemas and tenpin bowling.

2.12 The mid-1990s saw the expansion of major leisure parks. These leisure parks are generally anchored by a large multiplex cinema and offer other facilities such as ten-pin bowling, bingo, nightclubs, health/fitness clubs, themed destination restaurants, pub/restaurants, children's nurseries and budget hotels. Commercial leisure facilities have typically been located on the edge of town centres or out-of-centre, with good road access. Many leisure uses have also emerged on retail warehouse parks. This type of development has been focused in larger towns surrounding Breckland.

2.13 The cinema market remains an important sector because cinemas often anchor leisure developments, providing footfall for other uses. However, growth in this sector has slowed significantly in recent years with many areas reaching saturation levels. Many cinema operators have suspended or curtailed their expansion plans. Some cinema operators such as City Screen, Mainline Pictures and Reeltime Cinemas have opened new or taken over small cinemas in recent years. The expansion of other sectors has slowed, including ten-pin bowling and bingo. However, other sub-sectors have remained strong in recent years, in particular the private health and fitness market, with a number of multiple operators seeking premises across the UK, e.g. LA Fitness, Fitness First and Esporta. Nevertheless, the health and fitness sector is also reaching saturation point in some areas and is likely to be affected by the current down turn in the economy.

3.0 Planning Policy Context

National Retail Planning Policy

3.1 PPS4: Planning for Sustainable Growth was published on 29 December 2009 and sets out the Government's policies for economic development, replacing PPG4, PPG5, PPS6 and parts of PPS7 and PPG13. PPS4 places retail and town centre development in its wider context, as "economic development" which provides employment opportunities, generates wealth or produces an economic output or product. As such, this contributes to the Government's overarching objective of "sustainable economic growth".

3.2 PPS4 applies to the following main town centre uses (paragraph 7):

- retail (including warehouse clubs and factory outlet centres);
- leisure, entertainment facilities and the more intensive sport and recreation uses (including cinemas, restaurants, drive-through restaurants, bars and pubs, night-clubs, casinos, health and fitness centres, indoor bowling centres and bingo halls);
- offices; and
- arts, culture and tourism (theatres, museums, galleries and concert halls, hotels and conference facilities).

3.3 Paragraph 10 identifies that in order to achieve sustainable economic growth, one of the key objectives is to promote the vitality and viability of town and other centres as important places for communities. PPS4 identifies that to do this, the Government wants:

- new economic growth and development of main town centre uses to be focused in existing centres, with the aim of offering a wide range of services to communities in an attractive and safe environment and remedying deficiencies in provision in areas with poor access to facilities;
- competition between retailers and enhanced consumer choice through the provision of innovative and efficient shopping, leisure, tourism and local services in town centres, which allow genuine choice to meet the needs of the entire community (particularly socially excluded groups); and
- the historic, archaeological and architectural heritage of centres to be conserved and, where appropriate, enhanced to provide a sense of place and a focus for the community and for civic activity.

Using Evidence

3.4 As with PPS6, the emphasis remains on the "plan-led" approach and the need to base regional and local plan policies in a robust evidence base. The volume and detail of the evidence gathered should be proportionate to the importance of the issue. At the local level, policy EC1.3 states that the evidence base should:

a be informed by regional assessments;

b assess the detailed need for land or floorspace for economic development, including for all main town centre uses over the plan period;

c identify any deficiencies in the provision of local convenience shopping and other facilities which serve people's day-to-day need;

d assess the existing and future supply of land available for economic development, ensuring that existing site allocations for economic development are reassessed against the policies in this PPS, particularly if they are for single or restricted uses. Where possible, any reviews of land available for economic development should be undertaken at the same time as, or combined with, strategic housing land availability assessments; and

e assess the capacity of existing centres to accommodate new town centre development taking account of the role of centres in the hierarchy and identify centres in decline where change needs to be managed.

3.5 Specifically in relation to retail and leisure development, policy EC1.4 requires local planning authorities to take account of both the qualitative and quantitative need for additional floorspace for different types of retail and leisure developments.

3.6 When assessing quantitative need, relevant market information and economic data should be taken into consideration, including a realistic assessment of existing and forecast population levels, forecast expenditure for specific classes of goods to be sold, within the broad categories of convenience and comparison goods and for main leisure sectors, and forecast improvements in retail sales density.

3.7 In terms of qualitative need, assessments should consider whether there is provision and distribution of shopping, leisure and local services, which allow genuine choice to meet the needs of the whole community, and in deprived areas which lack access to a range of services and facilities, additional weight should be given to meeting these qualitative deficiencies. Assessments should also take into account the degree to which shops may be overtrading and whether there is a need to increase competition and retail mix.

Plan Making

3.8 Policy EC2.1 identifies the issues that regional planning bodies and local planning authorities are required to address within their development plan, including:

- setting out a clear economic vision and strategy for their area which positively and proactively encourages sustainable economic growth, identifying priority areas with high levels of deprivation that should be prioritised for regeneration investment;

- seeking to make the most efficient and effective use of land, prioritising previously developed land which is suitable for re-use and reflects the different location requirements of businesses;
- identifying a range of sites, to facilitate a broad range of economic development, including mixed use. Existing site allocations should not be carried forward from one version of the development plan to the next without evidence of the need and reasonable prospect of their take up during the plan period. If there is no reasonable prospect of a site being used for the allocated economic use, the allocation should not be retained, and wider economic uses or alternative uses should be considered;
- encouraging new uses for vacant or derelict buildings, including historic buildings; and
- considering how sites for different business types can be delivered, including by the use of compulsory purchase to assemble sites and other planning tools including area action plans, simplified planning zones and local development orders.

3.9 Specifically in relation to planning for centres, policy EC3 requires regional planning bodies and local planning authorities to set a strategy for the management and growth of centres over the plan period. As part of this strategy, LPAs should set flexible policies for their centres, which are able to respond to changing economic circumstances and encourage, where appropriate, high-density development accessible by public transport, walking and cycling.

3.10 LPAs are also required to define a network and hierarchy of centres, to meet the need of their catchments, based on:

- making choices about which centres will accommodate any identified need for growth in town centre uses, considering their expansion if necessary, taking into account the need to avoid an over concentration of growth in centres, and any identified deficiencies in the network of centres should be addressed by promoting centres to function at a higher level in the hierarchy, or designating new centres where necessary, giving priority to deprived areas;
- ensuring any extensions to centres are carefully integrated with the existing centre;
- where existing centres are in decline, considering the scope for consolidating and strengthening these centres by seeking to focus a wider range of services there, promoting the diversification of uses and improving the environment;
- where reversing decline in existing centres is not possible, considering reclassifying the centre at a lower level within the hierarchy of centres;

- ensuring that the need for any new, expanded or redeveloped out-of-centre regional or sub-regional shopping centre or any significant change in the role and function of centres is considered through the regional spatial strategy.

3.11 In addition, at the local level there is a requirement to:

a define the extent of the centre and the primary shopping area, having considered distinguishing between realistically defined primary and secondary frontages in designated centres and set policies that make clear which uses will be permitted in such locations;

b consider setting floorspace thresholds for the scale of edge-of-centre and out-of-centre development which should be subject to an impact assessment under and specify the geographic areas these thresholds will apply to;

c define any locally important impacts on centres which should be tested;

d encourage residential or office development above ground floor retail, leisure or other facilities within centres, ensuring that housing in out-of-centre mixed-use developments is not, in itself, used as a reason to justify additional floorspace for main town centre uses in such locations;

e identify sites or buildings within existing centres suitable for development, conversion or change of use; and

f use tools such as local development orders, area action plans, compulsory purchase orders and town centre strategies to address the transport, land assembly, crime prevention, planning and design issues associated with the growth and management of their centres.

3.12 Policy EC4.1 requires LPAs to proactively plan to promote competitive town centre environments and provide consumer choice, by:

a supporting a diverse range of uses which appeal to a wide range of age and social groups, ensuring that these are distributed throughout the centre;

b planning for a strong retail mix so that the range and quality of the comparison and convenience retail offer meets the requirements of the local catchment area, recognising that smaller shops can significantly enhance the character and vibrancy of a centre;

c supporting shops, services and other important small scale economic uses (including post offices, petrol stations, village halls and public houses) in local centres and villages;

d identifying sites in the centre, or failing that on the edge of the centre, capable of accommodating larger format developments where a need for such development has been identified;

e retaining and enhancing existing markets and, where appropriate, re-introducing or creating new ones, ensuring that markets remain attractive and competitive by investing in their improvement; and f taking measures to conserve and, where appropriate, enhance the established character and diversity of their town centres.

3.13 There is also a requirement for LPAs to manage the evening and night-time economy in centres (policy EC4.2), including policies to encourage a range of complementary evening and night-time uses, and setting out the number and scale of leisure developments they wish to encourage, taking into account the potential impact on the character and function of a centre.

3.14 Policy EC5.1 requires LPAs to identify an appropriate range of sites to accommodate the identified need for main town centre uses, ensuring that sites are capable of accommodating a range of business models in terms of scale, format, car parking provision and scope for disaggregation. The policy states that an apparent lack of sites of the right size and in the right location should not be a reason for LPAs to avoid planning to meet the identified need for development. In undertaking the site selection process, LPAs should:

a base their approach on the identified need for development;

b identify the appropriate scale of development, ensuring that the scale of the sites identified and the level of travel they generate, are in keeping with the role and function of the centre within the hierarchy of centres and the catchment served;

c apply the sequential approach to site selection;

d assess the impact of sites on existing centres; and

e consider the degree to which other considerations such as any physical regeneration benefits of developing on previously-developed sites, employment opportunities, increased investment in an area or social inclusion, may be material to the choice of appropriate locations for development.

3.15 In relation to the sequential approach to site selection, policy EC5.2 confirms the LPAs should identify sites that are suitable, available and viable in the following order:

1. locations in appropriate existing centres where sites or buildings for conversion are, or are likely to become, available within the plan period
2. edge-of-centre locations, with preference given to sites that are or will be well-connected to the centre
3. out-of-centre sites, with preference given to sites which are or will be well served by a choice of means of transport and which are closest to the centre and have a higher likelihood of forming links with the centre.

3.16 Policy EC5.3 states that sites that best serve the needs of deprived areas should be given preference when considered against alternative sites with similar location characteristics.

3.17 In terms of assessing the impact of proposed locations for development, policy EC5.4 requires LPAs to take into account the impact considerations set out in policy EC16 (see below), and ensure that proposed sites in a centre which would substantially increase the attraction of that centre and could have an impact on other centres are assessed for their impact on those centres.

3.18 Once sites are identified for development, policy EC5.5 states that LPAs should allocate sufficient sites in development plan documents to meet at least the first five years identified need, where appropriate including policies for phasing and release of sites.

Monitoring

3.19 Policy EC9.1 advises that LPAs should use their annual monitoring reports to keep the following matters under review, in order to inform consideration of the impact of policies and planning applications:

a the network and hierarchy of centres (at regional and local levels);

b the need for further development; and

c the vitality and viability of centres (at a local level).

3.20 In order to measure the vitality and viability of centres, Annex D identifies the key town centre health check indicators, as follows:

1 diversity of main town centre uses (by number, type and amount of floorspace): the amount of space in use for different functions such as offices, shopping, leisure, cultural and entertainment activities, pubs, cafes and restaurants and hotels;

2 the amount of retail, leisure and office floorspace in edge-of-centre and out-of centre locations;

3 the potential capacity for growth or change of centres in the network: opportunities for centres to expand or consolidate, typically measured in the amount of land available for new or more intensive forms of town centre development;

4 retailer representation and intentions to change representation: existence and changes in representation of types of retailer, including street markets, and the demand of retailers wanting to come into the centre, or to change their representation in the centre, or to reduce or close their representation;

5 shopping rents: pattern of movement in Zone A rents within primary shopping areas;

6 proportion of vacant street level property and the length of time properties have been vacant: vacancies can arise even in the strongest town centres, and this indicator must be used with care. Vacancies in secondary frontages and changes to other uses will also be useful indicators;

7 commercial yields on non-domestic property (i.e. the capital value in relation to the expected market rental): demonstrates the confidence of

investors in the long-term profitability of the centre for retail, office and other commercial developments;

8 land values and the length of time key sites have remained undeveloped: data on changes in land value and how long key town centre and edge of centre sites have remained undeveloped provide important indicators for how flexible policies should be framed and can help inform planning decisions;

9 pedestrian flows: a key indicator of the vitality of shopping streets, measured by the numbers and movement of people on the streets, in different parts of the centre at different times of the day and evening;

10 accessibility: ease and convenience of access by a choice of means of travel, including the quality, quantity and type of car parking; the frequency and quality of public transport services and the range of customer origins served and the quality of provision for pedestrians, cyclists and disabled people and the ease of access from main arrival points to the main attractions;

11 customer and residents' views and behaviour: regular surveys will help authorities in monitoring and evaluating the effectiveness of town centre improvements and in setting further priorities. Interviews in the town centre and at home can be used to establish views of both users and non-users of the centre, including the views of residents living in or close to the centre, and this information could also establish the degree of linked trips;

12 perception of safety and occurrence of crime: should include views and information on safety and security, including from the threat of terrorism, and where appropriate, information for monitoring the evening and night-time economy;

13 state of the town centre environmental quality: should include information on problems (such as air pollution, noise, clutter, litter and graffiti) and positive factors (such as trees, landscaping and open spaces).

Development Management Policies

3.21 Policies EC10 – EC19 provide LPAs with guidance for assessing planning applications for economic development.

3.22 Proposals for retail and town centre uses must be located in an existing centre and accord with an up to date development plan. Otherwise, as per draft PPS4, they must satisfy the 'sequential approach' and the 'significant adverse impact' tests before their positive and negative impacts and other material considerations are assessed.

3.23 The impact test consists of two sets of assessments; one applying to all forms of economic development and the other to town centre uses only. Policy EC10.2 identifies the impact considerations for all economic development as:

a whether the proposal has been planned over the lifetime of the development to limit carbon dioxide emissions, and minimise vulnerability and provide resilience to, climate change;

b the accessibility of the proposal by a choice of means of transport, and the effect on local traffic levels and congestion;

c whether the proposal secures a high quality and inclusive design which takes the opportunities available for improving the character and quality of the area and the way it functions;

d the impact on economic and physical regeneration in the area including the impact on deprived areas and social inclusion objectives; and

e the impact on local employment.

3.24 For main town centre uses that are not in a centre and not in accordance with an up to date development plan, policy EC16 identifies the following additional impact considerations:

a the impact of the proposal on existing, committed and planned public and private investment in a centre or centres in the catchment area of the proposal;

b the impact of the proposal on town centre vitality and viability, including local consumer choice and the range and quality oft he comparison and convenience retail offer;

c the impact of the proposal on allocated sites outside town centres being developed in accordance with the development plan;

d in the context of a retail or leisure proposal, the impact of the proposal on in-centre trade/turnover and on trade in the wider area, taking account of current and future consumer expenditure capacity in the catchment area up to five years from the time the application is made, and, where applicable, on the rural economy; and

e if located in or on the edge of a town centre, whether the proposal is of an appropriate scale (in terms of gross floorspace) in relation to the size of the centre and its role in the hierarchy of centres.

3.25 The policy also allows for local authorities to define any locally important impacts on centres which should be tested.

3.26 The objective is to focus on impacts during the first five years after scheme construction, including consideration of the cumulative impact of the development with recent permissions and developments.

3.27 However, the PPS also requires the assessment to be proportionate to the scale of development proposed and encourages pre application discussions on the type and level of information required within an impact assessment.

3.28 In terms of the sequential approach, the policy requirements are largely unchanged from PPS6. Sites are required to be assessed for their availability, suitability and viability. However PPS4 makes it clear that where an applicant has not demonstrated compliance with the sequential approach, then planning applications for main town centre uses not in an existing centre and not in accordance with an up to date development plan should be refused.

3.29 Similarly, if a proposal is likely to lead to a significant adverse impact, whether on its own or cumulatively, it should be refused. Where there is no significant adverse impact, the local planning authority is required to determine an application taking account of the positive and negative impacts of the proposal and any other material considerations.

Planning Policy Guidance Note 13: Transport (March 2001)

3.30 The key objectives, set out at paragraph 4 of PPG13 are to integrate planning and transport, in order to:

- promote more sustainable transport choices for both people and for moving freight;
- promote accessibility to jobs, shopping, leisure facilities and services by public transport; and
- reduce the need to travel, especially by car.

3.31 The Guidance advises that planning policies should seek to promote the vitality and viability of existing town centres, which should be the preferred locations for new retail and leisure developments. When this development cannot be accommodated in or on the edge of existing centres, it may be appropriate to combine the proposal with existing out-of-centre developments.

Breckland Local Plan

3.32 The Breckland Local Plan was adopted in September 1999. Following the Planning and Compulsory Purchase Act (2004) the majority of policies contained within the Local Plan were not saved beyond September 2007. The policies relating to retail/town centres were not saved.

Local Development Framework

3.33 Breckland Council is in the process of preparing its Local Development Framework (LDF) in line with the new provision of the Planning and Compulsory Purchase Act 2004. When adopted, the LDF will replace saved polices in the Local Plan as the statutory local planning document.

Core Strategy

3.34 The Core Strategy was adopted on 17 December 2009.

3.35 Policy SS1 identifies the Spatial Strategy for Breckland, and states that the District comprises seven types of place:

- The Key Centre for Development and Change – Thetford;
- The Market Town for Substantial Growth – Attleborough;

- The three market towns – Dereham, Swaffham and Watton;
- The Local Service Centre Villages;
- The Snetterton Heath Employment Area;
- The rural settlements; and,
- The countryside.

3.36 The policy identifies that Thetford will be the focus for growth in Breckland, and is the principal retail, service and employment centre in the south of the District. Thetford will provide 6,000 homes over the period between 2001 and 2021 and between 1,500 and 2000 new homes between 2021 and 2026. In addition, up to 5,000 net new jobs to the end of the plan period will have been delivered. The centre of the town will be the subject of major regeneration and with expanded retail, leisure, cultural and educational facilities will become a civic hub bringing together existing and new communities. Total food and non-food retailing floorspace will expand by approximately 9,400 sq m over the plan period in connection with this town centre regeneration.

3.37 Policy SS1 identifies that Attleborough will be a major focus for employment and residential growth. It will provide in the region of 4,500 new homes over the plan period. It will also provide between 1,500 and 2,000 net new jobs up to 2021. The population increase will provide the capacity to sustain higher-level services and improve the order of the centre. These services will be facilitated though the expansion of the town centre, which will include the development of approximately 4,800 sq m of food and non-food retailing.

3.38 Policy SS1 states that Dereham will provide up to 2,000 new houses over the plan period and provide between 900 and 1,800 new jobs over the remainder of the plan period. The town centre will grow and the service offer will be improved to enhance the settlement's potential for self-containment. In acknowledgement of this aim, food and non-food floor retail floorspace will expand by approximately 11,000 sq m over the plan period.

3.39 Swaffham and Watton are identified as mid-sized market towns that provide a good range of services for their residents' day-to-day needs but have limited capacity for expansion in their centres due to the constraints of their heritage buildings and Conservation Areas. The evidence base indicates that both settlements have limited potential for economic growth and mainly support small local businesses. Swaffham will provide some 1,000 houses over the plan period; Watton will deliver up to 900 houses over the same period. In terms of jobs growth approximately 300 to 650 jobs will be generated in Swaffham over the plan period, and approximately 250 in Watton. Food and non-food retailing floorspace will be expanded in Watton by approximately 300 sq m and by 850 sq m in Swaffham.

3.40 Policy CP 7 supports maintaining and enhancing the vitality and viability of the five town centres n Breckland, setting out the retail hierarchy and net convenience and comparison floorspace requirements in each centre to 2018, based on NLP's 2007 Updated Retail and Town Centre Study.

3.41 The hierarchy identifies Thetford as the "key centre for development and change", Dereham as the "main town and administrative centre serving mid-Norfolk", Attleborough as a "town centre serving a wide rural catchment" and Swaffham and Watton as "mid-size town centres serving local need".

3.42 The policy sets out measures to maintain and enhance the vitality of town centres within the District, including:

a permitting appropriate retail, leisure, cultural and business proposals;

b focusing retail proposals within town centres to the Primary Shopping Areas and limiting proposals to under 2,500 sq m gross floorspace unless it can be demonstrated that there is a need and no negative impact on the vitality and viability of the town centre;

c restricting retail development (except extensions under 200 sq m gross) outside the defined centres, unless it can be demonstrated that there is a need for the development, there are no sequentially preferable sites and no negative impact on the vitality and viability of the town centre;

d defining Primary and Secondary retail frontages on the Proposals Map in Thetford, Dereham, Attleborough, Swaffham and Watton to allow control over types of new development and change of uses at ground floor level to ensure that there is a healthy retail core and a vibrant mix of uses;

e identifying and protecting existing/new (as part of a strategic urban extension) Local Centres;

f encouraging proposals which seek to deliver environmental improvements, enhanced car parking provision and reduce the impact of traffic/dominance of the car for town centre users; and

g recognise the need to enhance the retail offer of Attleborough town centre to support additional growth.

3.43 The Core Strategy notes that given the proximity of the higher order centres of Norwich, Bury St Edmunds and Kings Lynn, additional comparison floorspace will be required in Dereham and Thetford to ensure leakage does not increase over time. In terms of the individual centres, the Core Strategy suggests:

- Thetford can support significant increases in floorspace given the large scale of growth for the town, which will support the regeneration of the town centre;
- the scale of retail growth in Dereham reflects its growing status as the main town and administrative centre for mid-Norfolk;
- Attleborough is identified to accommodate a small-medium sized supermarket and up to 2,250 sq m additional comparison floorspace to reflect the wider strategy for growth of the town centre;
- Swaffham and Watton should protect their core retail function, allowing for small scale incremental growth.

3.44 The Core Strategy states that the focus for delivering retail, leisure, cultural and business proposals, including hotels, tourist accommodation and B1(a) offices will be in the town centres, with retail development directed to the Primary Shopping Areas, as defined on the Proposals Map.

3.45 Policy DC 9 controls development and the mix of uses within the defined primary and secondary frontages.

Site Specific Policies and Proposals

3.46 The Breckland Site Specific Policies and Proposals Development Plan Document will allocate areas of land for different uses to deliver the Breckland Core Strategy and thus meet the development needs of the District up to 2026. The Site Specific Policies and Proposals document covers the entire District with the exception of Thetford, Attleborough and Snetterton where separate Area Action Plans are being produced to allocate specific sites. The Area Action Plan for Attleborough and Snetterton Heath is currently in its early stages and no documents have been published yet.

3.47 The Site Specific Policies and Proposals Preferred Options Consultation Document was published for consultation in June 2010.

3.48 The Preferred Options Document identifies a preferred retail option at Georges Road/Nunn's Way to Cowper Road in Dereham that could accommodate around 5,000 sq m (net) comparison goods floorspace. No retail options are identified in either Swaffham or Watton.

Thetford Area Action Plan

3.49 The Thetford Area Action Plan Preferred Options document was produced for consultation in February 2009.

3.50 Draft policy TH2 sets out the Council's Preferred Option for retail development in Thetford in terms of the amount and location of new retail floorspace, as follows:

a Town Centre – 5,000 sq m of new retail space, comprising 1,000 sq m convenience floorspace and 4,000 sq m comparison floorspace;

b Thetford Retail Park – 1,000 sq m of new retail space, comprising around 500 sq m convenience floorspace and 500 sq m comparison floorspace, assuming existing non-retail units are relocated or existing retail units can be increased in size. If possible, up to an additional 1,000 sq m of floorspace would be acceptable if it becomes likely that the town centre allowance is not deliverable in full.

c Forest Retail Park – 2,000 sq m of new retail space: A maximum of 500 sq m of convenience floorspace and 1,500 sq m comparison floorspace will be permitted at the Forest Retail Park. This could be in conjunction with new indoor, predominantly evening based, leisure facilities especially if such uses can not be accommodated within the broad town centre area.

4.0 The Shopping Hierarchy

Centres in Breckland and the Surrounding Area

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

4.2 A household telephone survey had been undertaken for this study (see Section 5.0) in order to establish the catchment areas of centres and shopping patterns in general.

4.3 Management Horizons Europe's UK Shopping Index 2008 provides an index of retail centres on the basis of a weighted score for multiple retailers represented in each centre i.e. the presence of each retail multiple is given a score related to its importance e.g. a department store has a higher score than other high street retailers. The MHE score does not necessarily reflect the overall size of the town centre or the number of shops, but the presence of national multiples. Towns with a larger number of independent shops may have a low MHE in relation to their overall size. Management Horizon's rank for centres in Breckland and sub-region is shown in Table 4.1 below.

Table 4.1 Management Horizons Europe Shopping Index (2008)

Centre	Rank	MHE Index Score
Norwich	6	541
Cambridge	74	234
Kings Lynn	121	185
Bury St Edmunds	221	127
Thetford	**570**	**60**
Diss	600	57
Dereham	**669**	**52**
Fakenham	1,139	32
Swaffham	**1,325**	**27**
Downham Market	1,590	22
Attleborough	**1,660**	**21**
Watton	**1,789**	**19**
Wymondham	1,866	18
Brandon	2,247	14

Source: Management Horizon Europe 2008

4.4 This index ranks Thetford as the main centre in Breckland and is ranked 570th of all centres in the UK, followed by Dereham which is ranked 669th. Norwich is ranked 6th, at the top of the shopping hierarchy. Cambridge, Kings Lynn and Bury St Edmunds are all ranked well above Thetford and other centres within Breckland. Swaffham is ranked 1,325th, Attleborough is ranked 1,660th and Watton is ranked 1,789th, reflecting their relatively local role and function in comparison with other centres in the area.

4.5 The relative performance and importance of town centres can be demonstrated by reviewing commercial yields. Retail yields for the established centres in the sub-region are shown in Table 4.2.

4.6 Commercial yields are a measure of property values, which enables the values of properties of different size, location and characteristic to be compared. The level of yield broadly represents the market's evaluation of risk and return attached to the income stream of shop rents. Broadly speaking low yields indicate that a centre is considered to be attractive and, as a result, more likely to attract investment and rental growth than a centre with high yields.

Table 4.2 Retail Yields in Breckland and other Centres

Centre	Yield %								
	2000	2001	2002	2003	2004	2005	2006	2007	2008
Norwich	5.00	5.00	5.00	5.50	5.50	5.50	5.50	5.50	5.25
Cambridge	5.25	5.25	5.25	5.50	5.50	5.25	5.25	5.00	5.75
Kings Lynn	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00	7.00
Bury St Edmunds	5.00	5.25	5.00	5.00	5.25	5.00	5.25	5.00	5.00
Thetford	**9.25**	**10.0**	**> 10**	**> 10**	**> 10**	**> 10**	**9.50**	**9.50**	**9.00**
Diss	9.00	9.00	9.00	9.00	9.00	9.00	8.50	8.50	8.50
Dereham	**8.00**	**8.00**	**8.00**	**8.00**	**8.50**	**8.50**	**8.00**	**8.00**	**8.00**
Fakenham	9.00	9.50	9.50	9.50	9.50	9.50	9.00	9.00	8.50

Source: Valuation Office (Autumn 2008)

4.7 Table 4.2 sets out the yields in Thetford and Dereham, the only centres within Breckland where data is recorded by the VOA, and other competing centres in the sub-region.

4.8 Yields are lower in Dereham in comparison with Thetford, which suggests that the property market is slightly stronger in Dereham. The table also shows that, in terms of yields, Thetford has improved marginally, while Dereham has remained relatively static.

4.9 The higher order centres of Norwich, Cambridge, Kings Lynn and Bury St Edmunds all have lower yields than the centres within Breckland, indicating the attraction of these centres.

4.10 The yield information reflects each centre's position within the wider retail hierarchy, i.e. larger centres have lower yields than smaller centres. Higher yields do not necessarily indicate a smaller centre is performing badly or that the centre is not vital and viable.

4.11 Since the 2004 Study was produced, Thetford's yield has reduced from greater than 10.0 to 9.0, and Dereham's yield has reduced from 8.5 to 8.0, which implies that the centres have improved over this period, however the VOA have not produced more recent data than 2008.

Summary

4.12 The analysis of the shopping hierarchy and commercial property indicators demonstrates that Thetford and Dereham are the main centres within Breckland District, with Attleborough, Swaffham and Watton all ranked significantly below these main two centres in the retail hierarchy.

4.13 Centres in the sub-region outside of Breckland are ranked significantly higher than Thetford and Dereham, in particular Norwich, Cambridge Kings Lynn and Bury St Edmunds. Thetford and Dereham are second tier centres in the retail hierarchy and Attleborough, Swaffham and Watton are third tier centres.

5.0 Household Survey

Survey Structure

5.1 NEMS Market Research carried out a telephone survey of 1,002 households across the Breckland study area in May 2010. The survey results are shown in Appendix 5 and summarised in this section. The study area, shown in Appendix 1, was split based on individual postcode sectors within the study area, and the results amalgamated to create six zones.

5.2 The study area includes Breckland District, and also small parts of adjacent authorities, such as South Norfolk, North Norfolk, Forest Heath and Kings Lynn and West Norfolk, where people may conceivably shop within Breckland. A list of the postcodes and zones within the study area is included in Appendix 1.

5.3 The number of interviews undertaken in each postcode sector reflects the population in each sector in order to provide statistically reliable sub-samples. The main aims of the survey were to establish patterns for the following:

- Main food and grocery shopping;
- Top-up food and grocery shopping;
- Non-food shopping, including:
  - clothing and footwear;
  - domestic electrical appliances;
  - other electrical goods (TV, Hi-Fi and computers);
  - furniture, soft furnishing or carpets;
  - DIY/hardware items and garden items;
  - chemist, health and beauty items; and
  - Other non-food items (e.g. books, CDs, DVDs, toys and gifts).
- Leisure activities, including:
  - cinema;
  - theatre;
  - pub/bar;
  - restaurant;
  - nightclub;
  - bingo;
  - health club; and
  - ten-pin bowling.

Food and Grocery Shopping

Main Food Shopping

5.4 Large food stores are the main destination for respondents' last main food shopping trip across the study area. Overall, the Morrisons, Dereham (15.3%), Tesco, Thetford (14.6%), Tesco, Dereham (14.1%) and Sainsbury. Thetford (9.9%) are the most popular shopping destinations for the study area as a whole, though different zones recorded different responses as the most popular destination for their main food shopping trip:

- **Zone 1 - Thetford:** Tesco, Thetford (35.1%), followed by Sainsbury, Thetford (26.3%) and Tesco, Brandon (12.1%);
- **Zone 2 - Dereham:** Morrisons, Dereham (42.7%) followed by Tesco, Dereham (33.9%);
- **Zone 3 - Swaffham:** Waitrose, Swaffham and Tesco, Dereham (both 20.4%), followed by Morrisons, Dereham (18.5%);
- **Zone 4 - Watton:** Tesco, Watton (35.9%), followed by Tesco, Dereham (26.4%) and Morrisons, Dereham (17.0%);
- **Zone 5 - Attleborough:** Sainsbury, Attleborough (52.0%) followed by Waitrose, Wymondham (11.4%); and
- **Zone 6 - South East Breckland:** Morrisons, Diss (26.8%), followed by Tesco, Thetford (18.3%) and Sainsbury, Attleborough (15.5%).

5.5 Overall, 3.1% of respondents chose to do their last main food shopping on the internet and have it delivered, which is higher than the average derived from similar NLP surveys across the Country (1.5%), and this may be due to higher than average levels of internet access in Breckland and the remoteess of some rural settlements from the main towns.

Mode of Travel for Main Food Shopping

5.6 In the whole study area, 91.1% of respondents indicated that they travel to do their main food shopping by car (both driver and passenger) which is higher than the NLP average derived from similar surveys across the country (74.6%). A lower proportion of households travel by bus (2.0%) compared to the NLP averages derived from other surveys of 8.6% and again, a lower proportion walk to their main food shopping destination (5.6%) which is lower than the NLP average of 11.7%. The number of all respondents (0.2%) using a bike to travel to their last main shopping location is also lower than the NLP average of 0.5%. These differences when compared with NLP's national average generally reflect higher levels of public transport usage within major cities and metropolitan authorities when compared with rural districts with market towns.

Top-Up Food Shopping

5.7 Top-up food shopping trips are normally made to supplement main food shopping trips and are undertaken on a more frequent basis for staples such as bread and milk. Overall 70% of households across the catchment area indicated that they undertake small-scale or top-up shopping trips in addition to their main food shopping trips.

5.8 The overall results show that, while the main food stores remain dominant, top-up shopping trips are dispersed over a larger number of stores, with the most popular two stores overall – Sainsbury, Attleborough and Morrisons, Dereham – accounting for just 5.7% and 5.3% of trips respectively. “Local shops” in the towns and villages account for 12.8% of all responses.

Non-Food Shopping

5.9 Respondents were asked in which location they buy most of their household’s non-food shopping. For the study area as a whole, Norwich was the most popular destination with 25.4% of all respondents shopping there, followed by Dereham (23.7%) and then Thetford (14.0%).

5.10 Despite the overall preference of Norwich, it is only the most popular destination for non-food shopping in the Attleborough zone (52.0%) once the results are broken down, and is the second most popular destination in the Dereham (35.8%) and Watton (30.2%) zones. Dereham is the most popular destination in the Dereham (56.9%), Swaffham (35.0%) and Watton (39.6%) zones. Thetford is the most popular destination in the Thetford zone (35.7%) while Diss is the most popular destination in the South East Breckland zone (29.6%). Other large centres outside the District are popular destinations, including Bury St Edmunds which is the second preference in the Thetford zone (31.0%) and Kings Lynn is the second preference in the Swaffham zone (31.1%).

5.11 Overall 1.7% of respondents buy their non-food shopping on the internet or have it delivered. The Swaffham zone has the highest proportion of respondents who buy most of their non-food shopping on the internet/have it delivered (2.9%).

Mode of Travel for Non-Food Shopping

5.12 The predominant mode of travel for non-food shopping was the car (both driver and passenger) with 80.7% of respondents indicating that they use this form of travel. The second most popular mode of transport for travelling to non-food shopping destinations was by bus/coach (9.4%) followed by walking (4.7%).

Non-Food Shopping Destinations

5.13 The household survey asked specific questions to probe which destinations respondents last visited to undertake particular types of non-food shopping.

5.14 The most popular destination overall for buying clothes and footwear was Norwich (35.6%), followed by Dereham (17.0%) and Bury St Edmunds (14.9%). Norwich was the most popular in the Dereham (47.4%), Watton (41.8%), South

East Breckland (39.7%) and Attleborough (68.0%) zones. Dereham was not the most popular in any individual zone but was second preference in the Dereham (40.7%), Swaffham and Watton (29.1%) zones. Bury St Edmunds was the most popular destination in the Thetford zone (39.0%) and Kings Lynn was the most popular destination in the Swaffham zone (29.3%). 5.9% of respondents last bought clothes and footwear on the internet/mail order.

5.15 Overall Dereham, including the town's retail warehouses, was the most popular destination for buying domestic electrical appliances such as fridges or kitchen items, with 21.5% of all respondents. However, this was only the most popular destination in the Dereham zone (59.4%). Thetford, including its retail parks, was the second most popular destination with 18.0% of all respondents, was the most popular destination in the Thetford zone (47.2%) joint most popular destination with Diss in the South East Breckland zone (21.2% each). Kings Lynn was the most popular destination in the Swaffham zone (26.6%), while Watton (50.0%) and Attleborough (39.8%) were the most popular destinations in their respective zones. 11.4% of respondents last bought domestic electrical appliances on the internet/mail order.

5.16 Dereham was also the main location respondents last bought other kinds of electrical goods, such as TVs, Hi-Fis and computers, with 21.7% of all respondents, and was the most popular location for the Dereham (55.4%) and Swaffham (36.6%) zones. Norwich was the most popular destination in the Attleborough zone (46.5%) and Diss was the most popular destination in the South East Breckland zone (23.7%). Thetford (45.1%) and Watton (49.0%) were the most popular destinations in their respective zones. 12.3% of respondents last bought other electrical goods on the internet/mail order.

5.17 Norwich was the most popular last destination for purchasing furniture, soft furnishings or floor coverings for 28.6% of all respondents, and was the most popular destination in the Dereham (42.2%), Swaffham (27.9%), Watton (29.1%), Attleborough (58.8%) and South East Breckland (30.6%) zones. Again, Thetford was the most popular destination (41.0%) in the Thetford zone. 5.7% of respondents last bought furniture, soft furnishings or floor coverings on the internet/mail order.

5.18 For DIY/hardware and garden items the most popular destination in the study area respondents last shopped at was Thetford (29.0%), including the retail parks, closely followed by Dereham (26.0%). Thetford was the most popular destination in the Thetford (73.1%) and South East Breckland (31.3%) zones, while Dereham was the most popular destination in the Dereham (67.9%) and Watton (47.8%) zones. In the Swaffham zone, Kings Lynn (34.1%) was the most popular destination and in the Attleborough zone Norwich (29.5%) was the most popular destination. Only 1.5% of respondents last bought DIY/hardware and garden items on the internet/mail order.

5.19 Overall, Dereham was the most popular destination for buying pharmaceutical, health and beauty items across the study area (28.1%), followed by Thetford

(21.4%). However the most popular destinations within each zone correspond with their nearest centre. For the South East Breckland zone, Diss was the most popular destination. 2.4% of respondents last bought pharmaceutical, health and beauty items on the internet/mail order.

5.20 Of all respondents 25.5% last bought items such as books, CDs, toys and gifts on the internet and this was the preferred method of purchasing these types of goods. Despite this, this was only the preferred method of purchase for residents of Swaffham (40.2%). For the Thetford, Dereham and Watton zones the most popular destinations corresponded with their nearest centre, while for the Attleborough and South East Breckland zones, Norwich was the most popular destination.

5.21 Table 5.1 shows the shopping destination with the highest proportion of respondents for each comparison goods category in each zone. This indicates broadly where people prefer to shop for each type of goods and allows comparison between each zone.

Table 5.1 Destinations with Highest Proportion of Responses

	Thetford	Dereham	Swaff-ham	Watton	Attle-borough	SE Breck
Clothing/ Footwear	Bury St Edmunds	Norwich	Kings Lynn	Norwich	Norwich	Norwich
Domestic Appliances	Thetford	Dereham	Kings Lynn	Watton	Attle-borough	Thetford / Diss
Electrical Goods	Thetford	Dereham	Dereham	Watton	Norwich	Diss
Furniture/ Carpets	Thetford	Norwich	Norwich	Norwich	Norwich	Norwich
DIY/ Hardware	Thetford	Dereham	Kings Lynn	Dereham	Norwich	Thetford
Chemist/ Beauty	Thetford	Dereham	Swaffham	Watton	Attle-borough	Diss
Books/CD Toys/Gifts	Thetford	Dereham	Internet	Watton	Norwich	Norwich

Source: NEMS Household Survey, May 2010

Town/District Centre Performance

5.22 Residents were asked if there was anything that would make them visit the centres in the District more often.

Thetford

5.23 Over 64% of respondents stated that “nothing in particular” or that they did not know what would make them visit Thetford town centre more often. Issues relating to the number, type, range and quality of shops were raised by 29.6% of all respondents, the highest number of which stated the “better choice of shops in general” (15.0%). Other responses to this question included better maintenance/cleanliness (1.8%) and more/cheaper car parking (1.5%).

Dereham

5.24 Overall, 68.1% of respondents stated that "nothing in particular" or that they did not know what would make them visit Dereham town centre more often. Issues relating to the number, type, range and quality of shops were raised by 22.1% of all respondents, the highest number of which stated the "better choice of shops in general" (8.9%). Other responses to this question included more/cheaper car parking (3.2%) and improved bus services (2.1%).

Attleborough

5.25 85.8% of respondents stated that either "nothing in particular" or that they did not know what would make them visit Attleborough town centre more often. Issues relating to the number, type, range and quality of shops were raised by 10.6% of all respondents.

Swaffham

5.26 82.0% of respondents stated that either "nothing in particular" or that they did not know what would make them visit Swaffham town centre more often. Issues relating to the number, type, range and quality of shops were raised by 15.2% of all respondents.

Watton

5.27 84.9% of respondents stated that either "nothing in particular" or that they did not know what would make them visit Swaffham town centre more often. Issues relating to the number, type, range and quality of shops were raised by 11.1% of all respondents.

Leisure Activities

Cinema

5.28 Respondents were asked if they went to the cinema and if so which cinema they last visited. 46.2% of respondents indicated they visit the cinema, which was the third most popular leisure activity after going to restaurants and to the theatre. This is slightly lower than NLP's average derived from similar surveys across the Country (51.0%), which may be due in part to the remote nature of parts of the District. The most popular destination was Norwich (41.0%) followed by Bury St Edmunds (29.4%) and Dereham (21.4%).

Theatre

5.29 In the study area, 46.8% of respondents indicated they visited theatres, which is higher than NLP's average for other surveys of 42.5%. When asked where they last visited the theatre, Norwich was the most popular location accounting for 41.0% of those respondents that did visit theatres in the catchment area. The second most popular destination was London (11.9%).

Pubs/Bars

5.30 The household survey asked respondents if and where they or their family last visited a pub/bar. About 43% of respondents indicated that they visit pubs/bars, which is slightly lower than the NLP average from other surveys (47.5%). The last destination for respondents who visit pubs and bars accords with the closest main centre within each zone. Of all respondents who visited pubs/bars, Dereham attracted the highest proportion of respondents (16.7%) closely followed by Thetford (16.1%).

Restaurants

5.31 Overall, 68.2% of respondents indicated they visit restaurants, which was the most popular leisure activity, and is similar to the NLP average for other surveys (67.9%). Of all respondents who visited restaurants, Norwich attracted the highest proportion of respondents (25.3%) followed by Dereham (13.0%) and Thetford (11.0%).

Nightclubs

5.32 Only 7.2% of respondents indicated that they had visited nightclubs, which is the least popular leisure activity, therefore the sample for nightclub visitors within each zone is relatively small. However, this participation rate is slightly below the figure derived by NLP's average from other similar surveys of 9.9%. The main nightclub location for respondents in the study area as a whole is Norwich (63.9%), followed by Bury St Edmunds (12.5%).

Bingo

5.33 Bingo facilities were visited by 8.1% of respondents, which is higher NLP's average participation rate of 5.1% as derived from other similar surveys. The sample for bingo visitors within each zone is again relatively small. Thetford was the most popular last place respondents went to play bingo (44.4%) followed by Norwich (17.3%).

Health and Fitness Clubs

5.34 About 21% of respondents indicated their household visit health clubs/gyms, which is lower than the NLP average participation rate from other surveys (25.6%). The main health club/gym destinations for respondents were facilities in Dereham (31.1%) and Thetford (16.3%).

Tenpin Bowling

5.35 Overall 27.6% of respondents indicated their household visit tenpin bowling facilities, which is higher than the NLP average for other surveys (18.1%). The main destinations for tenpin bowling are Dereham (42.6%) followed by Norwich (20.6%).

Key Messages from the Household Survey Results

5.36 The key findings of the household survey are summarised below:

- Large food stores are the primary destination for main food shopping and the preferred location of these food stores varies throughout the study area, with the most popular location being within or close to the zone.
- Over 70% of households indicated that they undertook small scale shopping or top-up shopping trips in addition to their main food shopping trips.
- A high proportion of respondents use the car as their main mode of travel for their food and non-food shopping, which is above NLP's national average derived from other surveys.
- Overall, Norwich was the most popular destination for most types of comparison goods shopping, and its influence over the District is evident, particularly to the east of the study area.
- Of the centres within the District, Dereham was the most popular destination for comparison shopping.
- Other centres outside the District that are popular destinations for comparison shopping comprise Kings Lynn, Bury St Edmunds and Diss.
- A 'better choice of shops in general' was the main suggestion which would make respondents visit the centres in Breckland more often.
- In general participation rates in Breckland for leisure and entertainment activities were similar to the national average derived from NLP surveys across the Country.

6.0 Thetford Town Centre

Introduction

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

Mix of Uses and Occupier Representation

6.2 The diversity of uses present in Thetford on the basis of the number of units is shown in Table 6.1 below. This is derived from Breckland Council's 2009 town centre floorspace data, and we have excluded units within the retail parks.

6.3 It should be noted that differences between the national averages and the Council's town centre floorspace data may be as a result of different areas assessed, for example the Goad data may cover a smaller section of the town centre than the Council's data.

Table 6.1 Thetford Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	56	38.1	44.0
Convenience Retail	12	8.2	9.5
A1 Services (2)	17	11.6	10.8
A2 Services	28	19.0	9.5
A3 and A5	21	14.3	14.8
A4	3	N/A	N/A
Vacant	13	8.8	11.4
Total	**150**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

1) UK average for all town centres surveyed by Goad Plans (April 09).

2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

6.4 The centre has a lower proportion of both comparison and convenience retailers compared with the national average. The proportion of A1 service uses and A3 and A5 uses are similar to the national average, while the proportion of A2 services is around double the national average. The percentage of vacant units is lower than the national average.

6.5 Thetford market is held every Tuesday and Saturday.

Retailer Representation

6.6 Thetford has a good selection of comparison shops reflecting the centre's role as one of the main town centres in Breckland. Major national comparison retailers present in the centre include Argos, WH Smiths, M & Co, Boots the Chemist and Wilkinsons. Table 6.2 provides a breakdown of comparison shop uses by goods categories.

6.1 The number of clothing/footwear retailers is lower than the national average but is the sector with the highest representation in the town centre. Other sectors with below national average representation comprise booksellers/arts/crafts/ stationers, DIY/hardware/homewares, toys/hobby/cycle/sport, jewellers and furniture/carpets/textile stores. Variety/department/catalogue stores, chemists/drug stores/opticians and "other" comparison retailers have a higher representation than national average. The representation of all other comparison categories are generally similar to the national average.

Table 6.2: Thetford Town Centre Breakdown of Comparison Units

Type of Unit	Thetford		% UK* Average
	Units	%	
Clothing and footwear	12	21.4	26.6
Furniture, carpets and textiles	0	0.0	9.1
Booksellers, arts, crafts and stationers	5	8.9	9.4
Electrical, gas, music and photography	6	10.7	9.8
DIY, hardware and homewares	2	3.6	6.6
China, glass, gifts and fancy goods	3	5.4	3.8
Cars, motorcycles and motor access.	2	3.6	3.1
Chemists, drug stores and opticians	7	12.5	8.9
Variety, department and catalogue	5	8.9	1.8
Florists, nurserymen and seedsmen	3	5.4	2.5
Toys, hobby, cycle and sport	1	1.8	5.1
Jewellers	2	3.6	4.9
Other comparison retailers	8	14.2	8.4
Total	**57**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

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

Service Uses

6.3 Thetford has a good range of service uses, with all categories represented as shown in Table 6.3. Restaurants/cafes/takeaways represent the highest number of units in the centre and the proportion is slightly below the national average. The proportion of banks and travel agents is higher than the national average, while the proportion of estate agents, hairdressers and dry cleaners are all below the national average.

Table 6.3: Thetford Town Centre Analysis of Selected Service Uses

Type of Unit	Thetford		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	21	38.2	43.9
Banks/other financial services	12	21.8	14.3
Estate agents/valuers	7	12.7	11.7
Travel agents	4	7.3	4.2
Hairdressers/beauty parlours	11	20.0	22.8
Laundries/dry cleaners	0	0.0	3.1
Total	**55**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

6.4 The centre also contains a number of non-retail/service uses, including hotels, a museum and an amusement arcade.

Vacant Units

6.5 There were 13 vacant units in Thetford town centre at the time of the land use survey in 2009. The vacancy rate (8.8%) is below the national average of 11.4%. The former Woolworths unit has been reoccupied by a Warehouse Clearance store. As stated above, the Goad averages only relate to the areas covered by Goad plans and the Council's figures may therefore include more peripheral areas which could artificially increase the vacancy rate in comparison to the national average.

Local Centres in Thetford

6.6 In addition to the role of the town centre in Thetford, we have been asked to consider the future role of three under-performing local centres in Thetford urban area, i.e. Abbey, Pine Close and Redcastle Furze.

6.7 **Abbey** provides seven shop units with residential units above. At the time of visit only one shop unit was occupied by a retail use (Londis), with two other units combined an occupied by a housing office. Four units were vacant. The surrounding area is reasonably attractive and there is nearby off-street car parking for over 20 cars. However the parade is relatively difficult to find and lacks prominent main road frontage to attract passing trade, as a result the parade's primary catchment area is likely to be small (walking distance). The residential units above are occupied, which may make comprehensive redevelopment unviable.

6.8 **Pine Close** also provides seven shop units with residential units above. At the time of visit only two shop units were occupied as a double unit (Select & Save convenience store). Five shop units were vacant and two of the seven residential units were vacant. There is an adjacent community centre, children's play area and ample open space. There is dedicated car parking but there is a large hard standing area with no marked spaces and no obvious function. The quality of landscaping around the shopping parade is poor. Again the parade is relatively difficult to find and may not benefit from passing trade, but it has better road frontage than the other two parades. Given the availability of surrounding land this centre may have more potential for comprehensive development than the other two centres.

6.9 **Redcastle Furze** is the smallest parade with four shop units with residential units above. At the time of visit two shop units were occupied (Post Office/ Londis and a fish and chip takeaway). Two shop units were vacant but all of the residential units were occupied, which may make comprehensive redevelopment unviable. There is an adjacent community facility and school. There is limited car parking and the quality of landscaping around the shopping parade is poor. The parade is tucked away and is very difficult to find. It probably does not benefit from passing trade, but may benefit form spin off trade from the adjacent school.

6.10 Given the small catchment areas of these three local centres and the lack of main road frontage, we believe it will be difficult to reoccupy all the vacant shop units for retail use, and these centres are likely to make a small contribution toward meeting the future need for retail floorspace. However there are improvements that could make the centre's more attractive to both customers and potential occupiers, as follows:

- environmental enhancements i.e. landscaping, paving, street furniture, shop front improvements and regular removal of graffiti;
- shop improvement grant incentives for new occupiers;
- improved CCTV surveillance;
- better signage to the centres from the surrounding area, especially from the nearest main roads;
- better car parking arrangements; and
- conversion of some vacant shop units to non-retail use e.g. office or community uses.

Summary of Thetford's Strengths and Weaknesses

Strengths

- Thetford is a historic market town with numerous listed and period buildings. It is the largest shopping and commercial centre in the southern half of Breckland. The household survey results indicate that 36% of residents normally use Thetford town centre for non-food shopping in the Thetford study area zone.
- The town centre also provides a range of service facilities including banks and building societies, restaurants and bars.

- The central shopping area is pedestrianised providing a traffic free shopping environment, and there is a natural circuit for pedestrians. There is good paving and street furniture throughout the centre.
- The centre has several public car parks which are distributed around the centre, within close proximity of the main shopping areas. Only 1.5% of survey respondents felt they would shop more often in Thetford Town Centre if more/cheaper car parking was available.
- The vacancy rate for the town centre is below the national average which suggests demand for premises is relatively strong, and there are fewer vacant units in the centre than there were at the time of the 2004 Study.

Weaknesses

- The buildings on Riverside Walk (1960s/70s) are unattractive and detract from the overall attractiveness of the town centre.
- Although possessing a number of national retailers, 30% of respondents to the household survey claimed they would shop in Thetford more often if there was a greater number, type, range and/or quality of shops in the town centre.
- There is a limited supply of available retail units within the centre. Most vacant units are small premises in secondary shopping areas. There are a limited number of large modern retail units suitable for multiple retailers.
- The town centre has limited redevelopment potential in the core area, due to the historic character of the town centre and conservation area.

7.0 # Dereham Town Centre

Introduction

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

Mix of Uses and Occupier Representation

7.2 The diversity of uses present in Dereham on the basis of the number of units is shown in Table 7.1 below. This is derived from Breckland Council's 2009 town centre floorspace data, and we have excluded units within the retail parks.

7.3 It should be noted that differences between the national averages and the Council's town centre floorspace data may be as a result of different areas assessed, for example the Goad data may cover a smaller section of the town centre than the Council's data.

Table 7.1 Dereham Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	108	46.8	44.0
Convenience Retail	17	7.4	9.5
A1 Services (2)	28	12.5	10.8
A2 Services	31	13.4	9.5
A3 and A5	24	10.4	14.8
A4	7	N/A	N/A
Vacant	22	9.5	11.4
Total	**238**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

1) UK average for all town centres surveyed by Goad Plans (April 09).

2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

7.4 The centre has a slightly higher proportion of comparison retail uses compared with the national average, and the proportion of convenience retailers is lower than the national average. The proportion of A1 and A2 service uses are slightly higher than the national average, while the proportion of A3 and A5 uses is below the national average. The percentage of vacant units is lower than the national average. Dereham market is held every Tuesday and Friday.

Retailer Representation

7.5 Dereham has a good selection of comparison shops reflecting the centre's role as one of the main town centres in Breckland. Major national comparison retailers present in the centre include Argos, New Look, Peacocks, Boots the Chemist and Wilkinsons. Table 7.2 provides a breakdown of comparison shop uses by goods categories.

7.6 The number of clothing/footwear retailers is significantly lower than the national average. The highest proportion of units in the centre fall within the electrical/ gas/music/photography category, which is higher than the national average. The proportion of units within the DIY/hardware/homewares sector is also noticeably higher than the national average. The representation of all other comparison categories are generally similar to the national average.

Table 7.2: Dereham Town Centre Breakdown of Comparison Units

Type of Unit	Dereham		% UK* Average
	Units	%	
Clothing and footwear	14	13.0	26.6
Furniture, carpets and textiles	13	12.1	9.1
Booksellers, arts, crafts and stationers	9	8.3	9.4
Electrical, gas, music and photography	17	15.7	9.8
DIY, hardware and homewares	12	11.1	6.6
China, glass, gifts and fancy goods	5	4.6	3.8
Cars, motorcycles and motor access.	1	0.9	3.1
Chemists, drug stores and opticians	8	7.4	8.9
Variety, department and catalogue	4	3.7	1.8
Florists, nurserymen and seedsmen	2	1.9	2.5
Toys, hobby, cycle and sport	8	7.4	5.1
Jewellers	4	3.7	4.9
Other comparison retailers	11	10.2	8.4
Total	**108**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

7.7 In terms of convenience retailers, the centre contains Iceland, Somerfield and an edge-of-centre Morrisons store, together with a range of independent convenience retailers, in addition to the out of centre Tesco and Lidl stores.

Service Uses

7.8 Dereham has a good range of service uses, with all categories represented as shown in Table 7.3. Restaurants/cafes/takeaways represent the highest number of units in the centre but the proportion is significantly below the national average. The proportion of banks and hairdressers is noticeably higher than the national average, and the proportion of estate agents and dry cleaners is slightly above the national average.

Table 7.3: Dereham Town Centre Analysis of Selected Service Uses

Type of Unit	Dereham		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	24	32.0	43.9
Banks/other financial services	15	20.0	14.3
Estate agents/valuers	9	12.0	11.7
Travel agents	2	2.7	4.2
Hairdressers/beauty parlours	22	29.3	22.8
Laundries/dry cleaners	3	4.0	3.1
Total	**75**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

7.9 The centre also contains a number of non-retail/service uses, including a hotel, community health centre, cinema and snooker hall.

Vacant Units

7.10 There were 23 vacant units in Dereham town centre at the time of the land use survey in 2009. The vacancy rate (10.0%) is below the national average of 11.4%. The former Woolworths unit has been reoccupied by a Poundland store. As stated above, the Goad averages only relate to the areas covered by Goad plans and the Council's figures may therefore include more peripheral areas which could artificially increase the vacancy rate in comparison to the national average.

Summary of Dereham's Strengths and Weaknesses

Strengths

- Dereham is the largest shopping centre in the north of Breckland district. The household survey results indicate that 57% of residents normally use Dereham town centre for non-food shopping in the Dereham study area zone, and was also the most popular destination in the Swaffham and Watton zones.
- Dereham town centre is quite compact with all facilities in easy walking distance.
- The centre has several free public car parks which are distributed around the centre, within close proximity to the main shopping areas.
- The town centre also provides a range of service facilities including banks and building societies, restaurants and bars.

- The vacancy rate is lower than the national average, although the number of vacant units is higher than when the 2004 Study was completed. This could be partly due to the inclusion of more peripheral areas of the town centre, as the total number of units is 238, compared to 177 in the 2004 Study.

Weaknesses

- There is no natural shopping circuit within the centre with numerous 'dead-end' shopping streets.
- Although possessing a number of national retailers, 22% of respondents to the household survey claimed they would shop in Dereham more often if there was a greater number, type, range and/or quality of shops in the town centre, and the proportion of clothing/footwear retailers is significantly lower than the national average.
- There are limited numbers of vacant units available within the prime shopping area and there is a shortage of large modern premises suitable for national multiple retailers.
- The historic character of the town centre and conservation area constrain potential redevelopment opportunities.

8.0 Attleborough Town Centre

Introduction

8.1 Attleborough town centre is located to the south east of the District and primarily serves the day-to-day shopping and service needs of local residents.

Mix of Uses and Occupier Representation

8.2 The diversity of uses present in Attleborough on the basis of the number of units is shown in Table 8.1 below. This is derived from Breckland Council's 2009 town centre floorspace data.

8.3 It should be noted that differences between the national averages and the Council's town centre floorspace data may be as a result of different areas assessed, for example the Goad data may cover a smaller section of the town centre than the Council's data.

Table 8.1 Attleborough Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	33	32.7	44.0
Convenience Retail	13	12.9	9.5
A1 Services (2)	16	15.8	10.8
A2 Services	22	21.8	9.5
A3 and A5	14	13.8	14.8
A4	2	N/A	N/A
Vacant	3	3.0	11.4
Total	**103**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

1) UK average for all town centres surveyed by Goad Plans (April 09).

2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

8.4 This split of uses is generally as expected for a town centre of Attleborough's size, but with a higher proportion of convenience and A1 and A2 service uses and a lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is significantly lower than the national average, with only three vacant units.

Retailer Representation

8.5 Attleborough has a limited selection on comparison shops, reflecting the centre's lower order shopping role. Some of the comparison goods categories identified by Goad are not represented in the centre, i.e. cars/motorcycles/ motor accessories and jewellers, and the number of units in each category is low. A breakdown of the comparison representation is shown in Table 8.2 below.

Table 8.2: Attleborough Town Centre Breakdown of Comparison Units

Type of Unit	Attleborough		% UK* Average
	Units	%	
Clothing and footwear	2	6.1	26.6
Furniture, carpets and textiles	3	9.1	9.1
Booksellers, arts, crafts and stationers	3	9.1	9.4
Electrical, gas, music and photography	5	15.1	9.8
DIY, hardware and homewares	2	6.1	6.6
China, glass, gifts and fancy goods	2	6.1	3.8
Cars, motorcycles and motor access.	0	0.0	3.1
Chemists, drug stores and opticians	4	12.1	8.9
Variety, department and catalogue	2	6.1	1.8
Florists, nurserymen and seedsmen	1	3.0	2.5
Toys, hobby, cycle and sport	4	12.1	5.1
Jewellers	0	0.0	4.9
Other comparison retailers	5	5.1	8.4
Total	33	100.0	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

8.6 In terms of convenience retailers, Attleborough town centre contains Sainsbury and Lidl store, together with a range of independent convenience retailers.

8.7 Attleborough market is held every Thursday.

Service Uses

8.8 Attleborough has a reasonable selection of service uses, as shown in Table 8.3. There is a higher proportion of banks and other financial services compared to the national average, and a lower proportion of restaurants/cafes/ takeaways. The representation of other categories of service uses is similar to the national average.

Table 8.3: Attleborough Town Centre Analysis of Selected Service Uses

Type of Unit	Attleborough		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	14	31.1	43.9
Banks/other financial services	10	22.2	14.3
Estate agents/valuers	6	13.3	11.7
Travel agents	1	2.2	4.2
Hairdressers/beauty parlours	12	26.7	22.8
Laundries/dry cleaners	2	4.5	3.1
Total	**45**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

N.B. ‘Restaurants, cafés and takeaways’ does not include drinking establishments in the centre.

8.9 The centre also contains a number of non-retail/service uses, including a hotel and gym.

Vacant Units

8.10 There were just three vacant units in Attleborough town centre at the time of the land use survey in 2009. The vacancy rate (3.0%) is significantly below the national average of 11.4%.

Summary of Attleborough's Strengths and Weaknesses

Strengths

- The centre primarily serves the day to day shopping and service needs of local residents.
- The Sainsbury store is a key anchor store and generates some linked shopping trips. The Sainsbury store was the most popular destination for 52% of respondents to the household survey in the Attleborough zone, and this store was also popular with residents in the South East Breckland zone.
- Attleborough is a traditional market town with many original period buildings and new developments have not had an adverse impact on the character of the centre.
- Attleborough has a very low vacancy rate.

Weaknesses

- The period buildings and conservation area designation may restrict future development in the centre.
- There is a lack of a natural circuit for pedestrians, due to the linear structure of the town centre.
- There is a limited range and choice of retail shops and services. 11% of respondents to the household survey claimed they would shop in Attleborough more often if there was a greater number, type, range and/ or quality of shops in the town centre.

9.0 # Swaffham Town Centre

Introduction

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

Mix of Uses and Occupier Representation

9.2 The diversity of uses present in Swaffham on the basis of the number of units is shown in Table 9.1 below. This is derived from Breckland Council's 2009 town centre floorspace data.

9.3 It should be noted that differences between the national averages and the Council's town centre floorspace data may be as a result of different areas assessed, for example the Goad data may cover a smaller section of the town centre than the Council's data.

Table 9.1 Swaffham Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	44	38.3	44.0
Convenience Retail	12	10.4	9.5
A1 Services (2)	9	7.8	10.8
A2 Services	20	17.4	9.5
A3 and A5	14	12.2	14.8
A4	6	N/A	N/A
Vacant	16	13.9	11.4
Total	**121**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

1) UK average for all town centres surveyed by Goad Plans (April 09).

2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

9.4 This split of uses is generally as expected for a town centre of Swaffham's size, with a slightly higher proportion of convenience uses and a lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is higher than the national average, and the number of vacant units has increased significantly since the 2004 Study from five to 16 units, however this could potentially be partly due to the inclusion of more peripheral areas of the town centre, as the total number of units is 121, compared to 112 in the 2004 Study.

Retailer Representation

9.5 Swaffham has a limited selection of comparison shops, although all of the comparison goods categories identified by Goad are represented within the centre, as shown in Table 9.2. However, the number of units in each category is low, and the proportion of clothing/footwear stores in particular is significantly below the national average.

Table 9.2: Swaffham Town Centre Breakdown of Comparison Units

Type of Unit	Swaffham		% UK* Average
	Units	%	
Clothing and footwear	4	9.1	26.6
Furniture, carpets and textiles	4	9.1	9.1
Booksellers, arts, crafts and stationers	4	9.1	9.4
Electrical, gas, music and photography	4	9.1	9.8
DIY, hardware and homewares	4	9.1	6.6
China, glass, gifts and fancy goods	3	6.8	3.8
Cars, motorcycles and motor access.	2	4.5	3.1
Chemists, drug stores and opticians	6	13.6	8.9
Variety, department and catalogue	1	2.3	1.8
Florists, nurserymen and seedsmen	1	2.3	2.5
Toys, hobby, cycle and sport	3	6.8	5.1
Jewellers	2	4.6	4.9
Other comparison retailers	6	13.6	8.4
Total	**44**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

Service Uses

9.6 Swaffham has a limited range of service uses to meet the day-to-day needs of residents, as shown in Table 9.3. The proportion of restaurants/cafes/ takeaways and hairdressers/beauty parlours is lower than the national average while the proportion of banks/other financial services and estate agents/ valuers is higher than the national average.

Table 9.3: Swaffham Town Centre Analysis of Selected Service Uses

Type of Unit	Swaffham		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	14	35.0	43.9
Banks/other financial services	12	30.0	14.3
Estate agents/valuers	6	15.0	11.7
Travel agents	1	2.5	4.2
Hairdressers/beauty parlours	6	15.0	22.8
Laundries/dry cleaners	1	2.5	3.1
Total	**40**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

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

Vacant Units

9.8 Swaffham contains 16 vacant units, which is a significant increase since the 2004 Study which recorded only five vacant units. The vacant units are all relatively small, with an average unit size of 44 sq m gross. The former Woolworths unit has now been reoccupied by Iceland.

9.9 As stated above, the Goad averages only relate to the areas covered by Goad plans and the Council's figures may therefore include more peripheral areas which could artificially increase the vacancy rate in comparison to the national average.

Summary of Swaffham's Strengths and Weaknesses

Strengths

- There are attractive buildings throughout Swaffham, many of which are listed.
- The Market Place provides a central focus for the town centre.
- There is a good selection of specialist independent shops and all of the comparison goods categories identified by Goad are represented within the centre.

Weaknesses

- The number of vacant units has increased significantly since the 2004 Study from five units to 16, and the vacancy rate is above the national average.
- The centre has a limited number of larger retail units to accommodate national multiple retailers.
- As expected for a lower order centre, the range of comparison shops is limited, especially clothing shops. 15% of respondents to the household survey claimed they would shop in Swaffham more often if there was a greater number, type, range and/or quality of shops in the town centre.

10.0 Watton Town Centre

Introduction

10.1 Watton is a small town located centrally in the District, and primarily serves the day-to-day shopping and service needs of local residents.

Mix of Uses and Occupier Representation

10.2 The diversity of uses present in Watton on the basis of the number of units is shown in Table 10.1 below. This is derived from Breckland Council's 2009 town centre floorspace data. Watton is the smallest of Breckland's centres with just 100 ground floor retail/service units.

10.3 It should be noted that differences between the national averages and the Council's town centre floorspace data may be as a result of different areas assessed, for example the Goad data may cover a smaller section of the town centre than the Council's data.

Table 10.1 Watton Town Centre Use Class Mix by Unit

Type of Unit	Units	% of Total Number of Units	
		%	National Average (1)
Comparison Retail	35	35.7	44.0
Convenience Retail	11	11.2	9.5
A1 Services (2)	13	13.3	10.8
A2 Services	20	20.4	9.5
A3 and A5	12	12.3	14.8
A4	2	N/A	N/A
Vacant	7	7.1	11.4
Total	**100**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

1) UK average for all town centres surveyed by Goad Plans (April 09).

2) incl. hairdressers, travel agents and other Class A1 uses not selling comparison/convenience goods.

10.4 This split of uses is generally as expected for a town centre of Watton's size, with a slightly higher proportion of convenience and A1 and A2 service uses and a lower proportion of comparison shops, reflecting its role as a lower order centre meeting the day to day needs of its local population. The vacancy rate is lower than the national average, and the number of vacant units has decreased from 15 at the time of the 2004 Study to just seven units.

Retailer Representation

10.5 Watton has a limited selection on comparison shops, reflecting the centre's lower order shopping role. Some of the comparison goods categories identified by Goad are not represented in the centre, i.e. cars/motorcycles/ motor accessories, variety/department/catalogue stores and toys/hobby/cycle and sports retailers, and the number of units in each category is low. A breakdown of the comparison representation is shown in Table 10.2 below. In terms of convenience operators, Watton contains Tesco and Somerfield, supported by a number of smaller and independent convenience retailers. There is a market on Wednesday and a farmers ' market on the first Saturday of the month.

Table 10.2: Watton Town Centre Breakdown of Comparison Units

Type of Unit	Watton		% UK* Average
	Units	%	
Clothing and footwear	5	14.3	26.6
Furniture, carpets and textiles	4	11.4	9.1
Booksellers, arts, crafts and stationers	3	8.6	9.4
Electrical, gas, music and photography	5	14.3	9.8
DIY, hardware and homewares	4	11.4	6.6
China, glass, gifts and fancy goods	2	5.7	3.8
Cars, motorcycles and motor access.	0	0.0	3.1
Chemists, drug stores and opticians	2	5.7	8.9
Variety, department and catalogue	0	0.0	1.8
Florists, nurserymen and seedsmen	2	5.7	2.5
Toys, hobby, cycle and sport	0	0.0	5.1
Jewellers	2	5.7	4.9
Other comparison retailers	6	17.2	8.4
Total	**35**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

Service Uses

10.6 Watton has a limited range of service uses to meet the day-to-day needs of residents, as shown in Table 10.3. The proportion of restaurants/cafes/ takeaways is lower than the national average and there are no travel agents, while the proportion of banks/other financial services and estate agents/ valuers is higher than the national average. The proportion of hairdressers/ beauty parlours and laundries/dry cleaners is similar to the national average.

Table 10.3: Watton Town Centre Analysis of Selected Service Uses

Type of Unit	Watton		% UK* Average
	Units	%	
Restaurants/cafes/takeaways	12	30.8	43.9
Banks/other financial services	10	25.6	14.3
Estate agents/valuers	7	17.9	11.7
Travel agents	0	0.0	4.2
Hairdressers/beauty parlours	9	23.1	22.8
Laundries/dry cleaners	1	2.6	3.1
Total	**39**	**100.0**	**100.0**

Source: Breckland Council town centre floorspace data (2009)

** UK average for all town centres surveyed by Goad Plans (April 09).*

N.B. 'Restaurants, cafés and takeaways' does not include drinking establishments in the centre.

10.7 In addition to these service uses, Watton also contains a hotel and other non-retail services.

Vacant Units

10.8 There were just seven vacant units in Watton town centre at the time of the land use survey in 2009, and this number has reduced significantly since the 2004 Study which identified 15 vacant units. The vacancy rate (7.1%) is significantly below the national average of 11.4%.

Summary of Watton's Strengths and Weaknesses

Strengths

- The centre serves the day to day shopping and service needs of local residents.
- The centre has an attractive historic environment with many period buildings.
- The centre has an interesting selection of independent specialist retailers.
- Watton has a low vacancy rate which suggests demand for premises is relatively strong, and there are fewer vacant units in the centre than there were at the time of the 2004 Study.

Weaknesses

- The period buildings and conservation area designation may restrict future development in the centre.
- As expected for a lower order centre, the range and choice of shops is relatively limited, and not all of the comparison retailer categories are represented in the centre. 11% of respondents to the household survey claimed they would shop in Swaffham more often if there was a greater number, type, range and/or quality of shops in the town centre.
- The centre has a limited number of larger retail units to accommodate national multiple retailers.

11.0 The Need for New Retail Development

Introduction

11.1 This section assesses the quantitative and qualitative scope for new retail floorspace in Breckland in the period from 2010 to 2026. It sets out the methodology adopted for this analysis and provides a quantitative capacity analysis in terms of levels of spending for convenience and comparison shopping. A qualitative assessment of the range and scale of existing shopping facilities has been undertaken.

11.2 All monetary values expressed in this analysis are at 2008 prices, consistent with Experian's base year expenditure figures for 2008, which is the most up to date information.

Methodology and Data

11.3 The quantitative analysis is based on a defined study area that covers Breckland District together with parts of the neighbouring authorities including South Norfolk, North Norfolk, Forest Heath, St. Edmundsbury, Kings Lynn and West Norfolk. The study area is sub-divided into six zones.

11.4 The study area is based on postcode area boundaries. The extent of the study area is based on the 2004 Retail and Town Centre Study in 2004 and reflects the proximity of competing shopping destinations, i.e. shopping facilities within Breckland are expected to attract their trade from residents within the study area and there will be a minimal level of trade drawn from beyond the study area.

11.5 The level of available expenditure to support retailers is based on first establishing per capita levels of spending for the study area population. Experian's local consumer expenditure estimates for comparison and convenience goods for each of the study area zones for the year 2008 have been obtained.

11.6 Experian's EBS national expenditure information has been used to forecast expenditure within the study area in the short term (2008 to 2011). Unlike previous expenditure growth rates provided by The Data Consultancy (formerly URPI), which were based on past trends, Experian's projections are based on an econometric model of disaggregated consumer spending. This model takes a number of macro-economic forecasts (chiefly consumer spending, incomes and inflation) and uses them to produce forecasts of consumer spending volumes, prices and value, broken down into separate categories of goods. The model incorporates assumptions about income and price elasticities.

11.7 For longer term projections Experian's ultra long term growth rate has been adopted (0.5% for convenience goods and 4.7% for comparison) to project expenditure between 2011 to 2016 and beyond. We believe the Experian's lower EBS growth rates reflect the current economic downturn and provide an appropriate growth rate for the short term. In the longer term it is more difficult to forecast year on year changes in expenditure, and in our view past trend line growth rates provide the most appropriate average growth rate and the potential post recession recovery.

11.8 To assess the capacity for new retail floorspace, penetration rates are estimated for shopping facilities within the study area. The assessment of penetration rates are based on a range of factors but primarily information gathered through the 2010 household survey.

11.9 The total turnover of shops within Breckland District is estimated based on penetration rates. For convenience goods shopping turnover estimates are then compared to average company benchmark or average sales floorspace densities derived from Verdict 2009 information and Mintel's Retail Rankings 2009, which provide an indication of how individual retail stores and centres are performing against expected turnover averages. This allows the identification of potential surplus or deficit capacity for retail sales floorspace.

Population and Spending

11.10 The study area population for 2010 to 2026 is set out in Table 1B in Appendix 2. Experian provides population estimates for each of the survey zones at 2001 based on Census data. These have been projected forward between 2001 and 2026 based on Norfolk County Council Population Projections (including housing growth) and Suffolk County Council Population Projections. Population within the study area is expected to increase between 2001 and 2026 by 19%.

11.11 Table 2B in Appendix 2 sets out the forecast growth in spending per head for convenience goods within each zone in the study area up to 2026. Comparison forecasts of per capita spending are shown in Table 1C in Appendix 3.

11.12 The levels of available spending are derived by combining the population in Table 1B per capita spending figures in Tables 2B and 1C.

11.13 For both comparison and convenience spending, a reduction has been made for Special Forms of Trading (SFT) including non-store activity. SFT is included within Experian's Goods Based Expenditure (GBE) estimates. STF includes other forms of retail expenditure not spent in shops e.g. mail order sales, some internet sales, vending machines, party plan selling, market stalls and door to door selling. SFT needs to be excluded from retail assessments because it relates to expenditure not spent in shops and does not have a direct relationship to the demand for retail floorspace. The growth in home computing, Internet connections and interactive TV may lead to a growth in home shopping and may have effects on retailing in the high street. Experian provides projections for special forms of trading and e-tailing.

11.14 This Experian information suggests that non-store retail sales in 2008 is:

- 5.9% of convenience goods expenditure; and
- 11.3% of comparison goods expenditure.

11.15 Experian predicts that these figures will increase to 8.1% and 13.9% by 2016. Experian also provides 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. Based on Experian data, SFT (including non-retail e-tailing but excluding e-tail through retail businesses) is 1.8% and 7.7% of total convenience and comparison goods expenditure respectively in 2008. The projections provided by Experian suggest that these percentages could increase to 2.8% and 8.9% by 2016. The amount of e-tail expenditure through non-retail businesses is expected to increase significantly in proportional terms, but as a proportion of total expenditure this sector is expected to remain relatively insignificant for the foreseeable future.

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

11.17 On-line shopping has experienced rapid growth since the late 1990s but in proportional terms the latest available data suggests it remains an insignificant percentage of total retail expenditure. Recent trends suggest continued strong growth in this sector. However, there is still uncertainty about its longer-term prospects. Experian's figures suggest that the growth in e-tailing has to a certain extent been at the expense of other forms of home shopping such as catalogue and mail order shopping.

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

11.19 As a consequence of growth in population and per capita spending, convenience goods spending within the study area is forecast to increase by 18.8% from £302.60 million in 2010 to £359.47 million in 2026, as shown in Table 3B. Population growth accounts for about 60% of this expenditure growth, and 40% relates to growth in expenditure per capita.

11.20 Comparison goods spending is forecast to more than double between 2010 and 2026, increasing from £444.88 million in 2010 to £985.49 million, as shown in Table 2C. Population growth accounts for less than 10% of this expenditure growth, and 90% relates to growth in expenditure per capita.

11.21 These figures relate to real growth and exclude inflation.

Existing Retail Floorspace 2010

11.22 Existing convenience goods retail sales floorspace within Breckland is 23,065 sq m net as set out in Table 1A, Appendix 1. This floorspace figures excludes comparison sales floorspace within food stores (5,949 sq m net).

11.23 Comparison goods retail floorspace within Breckland is estimated as 45,096 sq m net as shown in Table 2A, Appendix 1.

Existing Spending Patterns 2010

Convenience Shopping

11.24 The results of the household shopper questionnaire survey undertaken by NEMS in May 2010 have been used to estimate existing shopping patterns within the study area. The estimates of market share or penetration within each study area zone are shown in Table 4B, Appendix 2.

11.25 Table 4B indicates that the majority of residents within all zones, except Zone 6 (South East Breckland zone) carry out their convenience retail shopping within Breckland (ranging from 68% to 98%). The level of convenience goods expenditure attracted to shops/stores in Breckland in 2010 is estimated to be £247.37 million as shown in Table 5B, Appendix 2. Breckland's market share of total convenience expenditure in the study area as a whole is estimated to be about 76% (£229.04 million of £302.60 million).

11.26 Company average turnover to sales floorspace densities are available for major food store operators and are compiled by Verdict. Company average sales densities (adjusted to exclude petrol and comparison sales and include VAT) have been applied to the sales area of the large food stores listed in Table 1A, Appendix 1, 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.

11.27 The estimated convenience goods sales areas have been derived from a combination of the Council's floorspace surveys, Institute of Grocery Distribution (IGD) and NLP estimates based on site visits. Estimates for comparison sales floorspace within large food stores has been deducted from the figures in Table 1A in Appendix 1, for consistency with the use of goods based expenditure figures.

11.28 Average sales densities are not widely available for small convenience shops, particularly independent retailers. Based on the mix of shops present in each town in Breckland and our experience of trading levels of small independent shops informed by household shopper surveys across the country, we have adopted an average sales density of £4,000 per sq m has been adopted for small convenience shops in the main towns of Thetford and Dereham and £3,500 per sq m in the smaller towns of Attleborough, Swaffham and Watton. The total benchmark turnover of existing convenience sales floorspace within the five towns in Breckland is £218.85 million at 2010.

11.29 The assessment of shopping patterns, based on the household survey results, suggests that convenience goods expenditure attracted to Breckland in 2010 is £247.37 million, or £242.14 million excluding local shops outside the main centres. These figures suggest that collectively convenience retail facilities in Breckland are trading satisfactorily. The identified available expenditure is 10.4% (or +£23.29 million) above benchmark levels.

11.30 Table 12.1 indicates that trading levels amongst convenience goods facilities in Breckland vary significantly throughout the District. However, the average sales density figures should be viewed in the context of the type of floorspace and operators located in each town. Convenience floorspace in Thetford and Dereham is dominated by large Tesco, Sainsburys and Morrisons stores, which generally trade at a high sales density (over £10,000 per sq m net). Watton and Attleborough also have relatively high sales densities due to the presence of Tesco and Sainsbury.

Table 12.1: Defined Town Average Convenience Sales Densities

Centre	Average Sales Density 2010 £ per sq m net
Thetford	£12,001
Dereham	£12,876
Swaffham	£5,678
Watton	£9,771
Attleborough	£9,816
Breckland Average	**£10,644**

Comparison Shopping

11.31 The estimated comparison goods expenditure currently attracted by shopping facilities within Breckland is £207.41 million in 2010, as shown in Table 3C, Appendix 3.

11.32 Breckland's market share of total comparison goods expenditure generated within the study area is 44%. The market share is lowest within zone 6 (South

East Breckland, 29%). In other zones expenditure retention ranges from 35% (zone 5, Attleborough) to 66% (zone 4, Watton).

11.33 The current level of comparison expenditure available to facilities in Breckland is £207.41 million. Based on this expenditure estimate, the average sales density for existing comparison sales floorspace (45,191 sq m net) is £4,590 per sq m net. Mintel's Retail Rankings 2010 provides company average sales density information for a selection of national retailers. This data suggests a notional average sales density for national comparison retailers (£5,549 per sq m). Based on our recent experience across the country average sales densities for comparison floorspace can range from £2,000 to £7,000 per sq m net. The higher end of this range is usually only achieved by successful shopping centres, which reflects the higher proportion of quality multiple retailers. The analysis of existing comparison shopping patterns in 2010 suggests the following average sales density figures for each town.

11.34 Table 12.2 indicates that trading levels amongst comparison facilities in Breckland vary significantly throughout the District. The average sales density figures should be viewed in the context of the type of floorspace in each town. Comparison facilities in Watton and Attleborough are trading at a reasonably high sales density, compared with Thetford, Dereham and Swaffham trading towards the middle of the range. Retail warehouses generally trade at a lower density than high street shops, which helps to explain why the averages are lower in Thetford and Dereham. Watton and Attleborough sales densities are relatively high because these town centres have predominantly small high street shop units with limited sales areas trading at a higher density.

Table 12.2: Defined Centres Comparison Average Sales Densities

Centre	Average Sales Density 2010 £ per sq m net
Thetford	£4,206
Dereham	£4,547
Swaffham	£3,995
Watton	£7,260
Attleborough	£6,405
Breckland Average	**£4,590**

11.35 On balance comparison shopping facilities within Breckland appear to be trading satisfactorily.

Quantitative Capacity for Convenience Floorspace

11.36 The level of available convenience goods expenditure in 2013, 2016, 2021 and 2026 is shown at Tables 6B to 9B, in Appendix 2. These tables assume existing 2010 market shares will be maintained in the future. The total level of convenience goods expenditure available for shops in Breckland between 2010 and 2026 is summarised in Table 10B. This table takes into account the population and expenditure projections shown in Table 1B to 3B in Appendix 2. The benchmark turnover of existing convenience floorspace has been subtracted from the estimates of available expenditure to provide surplus expenditure estimates, as shown in Table 10B.

11.37 Convenience expenditure available to shopping facilities in Breckland is expected to increase from £247.37 million in 2010 to £292.49 million in 2026.

11.38 Table 10B assumes that the benchmark turnover of convenience floorspace will not increase between 2010 to 2011 due to the recession and limited projected expenditure growth. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 0.3% per annum is adopted, which we believe is realistic if an expenditure growth rate of 0.5% per annum is achieved.

11.39 Table 10B subtracts the benchmark turnover of existing floorspace and proposed commitments from available expenditure to calculate the amount of surplus expenditure that may be available for further new development. Within the District, future expenditure growth will generate an expenditure surplus of +£5.29 million in 2013 increasing to +£9.59 million in 2016, +£20.58 million in 2021 and +£32.25 million in 2026.

11.40 The figures suggest there is convenience expenditure deficit in Swaffham and Watton, but there is a surplus in other parts of the District. The surplus expenditure projections have been converted into potential new floorspace estimates in Table 11B. Surplus expenditure in converted into floorspace estimates based on an assumed average sales density figure, which is based on the current mix of food stores and small shop in the District. The current average sales density across the District is £9,621 per sq m net. An average sales density of £3,500 per sq m is adopted for other local shops.

11.41 Based on this assumption surplus expenditure at 2016 could support 3,107 sq m net of sales floorspace (4,439 sq m gross), or 4,034 sq m net by 2021 (5,763 sq m gross), as shown in Table 11B. The projection to 2026 is 5,103 sq m net (7,290 sq m gross).

Quantitative Capacity for Comparison Floorspace

11.42 The household survey suggests that Breckland's retention of comparison expenditure is lower than for convenience goods. The lower level of comparison expenditure retention is due to the strength of competing comparison goods facilities in neighbouring authorities, particularly Norwich, Kings Lynn and Bury St Edmunds.

11.43 Further improvements to comparison retail provision within the District could help to claw back some additional expenditure leakage from the study area. However, major developments in competing towns, e.g. Chapelfield Shopping Centre in Norwich, Grand Arcade in Cambridge and The Arc in Bury St Edmunds, may limit the ability of shopping facilities in the District to increase their market share of expenditure. The strategy for Breckland should seek to maintain existing market share in the face of increasing future competition, whilst maintaining the vitality and viability of designated centres.

11.44 The retail capacity projections in this report assume Breckland can maintain its market share of comparison expenditure in the future. Available comparison goods expenditure has been projected forward to 2013, 2016, 2021 and 2026 based on 2010 penetration rates (i.e. assuming that comparison retail facilities will maintain their current market share) in Tables 4C to 7C in Appendix 3, and summarised in Table 8C. Available comparison expenditure is expected to increase from £207.41 million in 2010 to £460.06 million in 2026.

11.45 Future available expenditure is compared with the projected turnover of existing and proposed comparison retail facilities within the District in order to provide estimates of surplus expenditure, as shown in Table 8C. Table 8C assumes that the benchmark turnover of comparison floorspace will not increase between 2010 to 2011 due to the recession, limited projected expenditure growth and the existing satisfactory turnover densities. In the longer term existing floorspace within the District is expected to increase its benchmark turnover in real terms. A growth rate of 2% per annum is adopted, which we believe is realistic if an expenditure growth rate of 4.7% per annum is achieved. 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.

11.46 Short term population and expenditure growth will result in available comparison expenditure increasing by £26.4 million by 2013, but commitments and growth in turnover efficiencies will absorb this expenditure growth and create an expenditure deficit of -£8.75 million in 2013. continued expenditure growth will create an expenditure surplus of £16.35 million in 2016, increasing to £70.94 million in 2021 and £146.29 million in 2026.

11.47 Surplus comparison expenditure has been converted into net comparison sales floorspace projections in Table 9C in Appendix 3. Surplus expenditure at 2016 could support 2,961 sq m net of sales floorspace (3,948 sq m gross), or 11,638 sq m net (15,518 sq m gross) by 2021, as shown in Table 9C. The projection to 2026 is 21,739 sq m net (28,985 sq m gross).

Qualitative Need for Retail Development

Food and Grocery Shopping

11.48 Most households tend to undertake two kinds of food and grocery shopping trips, i.e. a main shopping trip generally made once a week or less often and top-up shopping trips made more frequently. Many households will also undertake bulk food shopping trips, particularly households who live in rural areas who have access to a car for shopping. The availability of a wide range of products and free surface level car parking are important requirements for bulk food shopping trips. Large supermarkets or superstores (defined as over 2,323 sq m net or more or 25,000 sq ft), are the usual destination for these types of shopping trip.

11.49 The capacity projections in this section suggest there is scope for additional convenience retail floorspace within Breckland District. The potential level of surplus expenditure available within Thetford, Dereham and Attleborough at 2016 could support 3,073 sq m net of new sales floorspace (or 4,389 sq m gross). This floorspace projection does not include the potential sale of comparison goods within proposed food stores.

11.50 In qualitative terms the provision of large food stores suitable for main and bulk food shopping in the main centres of Thetford and Dereham is good. The range and choice of goods available within the Sainsbury and Tesco stores in Thetford and Morrisons and Tesco in Dereham is satisfactory. The discount sector is represented by Aldi in Thetford and Lidl in Dereham.

11.51 Residents within Swaffham, Watton and Attleborough are served by smaller supermarkets, the largest being the Waitrose in Swaffham, Tesco in Watton (which has permission for an extension) and Sainsbury in Attleborough, which are also suitable for bulk food shopping. The discount sector is represented by Netto in Swaffham and Lidl in Attleborough.

High Street Comparison Shopping

11.52 Thetford and Dereham have a reasonable range of comparison shops, including a selection of national multiples and a good selection of high quality specialist independent traders.

11.53 The smaller centres (Swaffham, Watton and Attleborough) have a number of independent retailers that provide specialist shopping and a much smaller number of national multiples. The number of multiple retailers within Thetford and Dereham is not comparable with those available in Norwich, Kings Lynn, Bury St Edmunds or Cambridge. The level of outflow of expenditure could increase in the future if no investment/development is secured in Breckland. Major development in Norwich (Chapelfield Shopping Centre), Cambridge (Grand Arcade) and Bury St Edmunds (Arc) have increased these centres' retail floorspace.

11.54 Given the scale, quality and range of shopping facilities available in these larger centres a proportion of comparison expenditure within the study area is spent outside the District, particularly in the south and east of the District. However, there may be potential to improve expenditure retention in the Thetford and Dereham areas.

11.55 The objective of the retail development strategy for Breckland should be to maintain the District's shopping role and market share within the sub-region, in the face of increasing competition. Therefore, the economic projections assume that new development will retain the District's share of comparison expenditure in the study area and will help to maintain this share in the future.

11.56 Based on this assumed maintenance of market share the surplus comparison goods expenditure available to shops in Breckland is estimated to reach £16.35 million by 2016. This expenditure at 2016 could support approximately 3,000 sq m net (4,000 sq m gross) of retail comparison floorspace.

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

11.58 The quantitative assessment in this section suggests that there is quantitative capacity in the medium and long term to improve comparison retail floorspace in Breckland due to growth projections in population and expenditure. This potential scope could provide opportunities to improve the range and quality of comparison shopping in town centres within the District. In addition, it will also help prevent further expenditure leakage to centre outside Breckland.

11.59 Opportunities to accommodate about 3,000 sq m net (4,000 sq m gross) of comparison shops up to 2016 should be identified within the five town centres, in order to ensure the District maintains its current share of comparison expenditure in the future. The market demand for new high street comparison development is likely to be greatest in Thetford and Dereham. Within the smaller towns development will be more limited.

11.60 The main constraints on achieving this floorspace projection will be the availability of suitable development sites within the main centres and limited occupier demand for space within the District. In our view the limited occupier demand for space should be short term and hopefully demand will recover after the recession. We believe the floorspace projection up to 2016 can be achieved.

11.61 There is a good selection of retail warehouses in Breckland, mostly located in Thetford and Dereham. The bulky goods sector has been hit hard by the economic downturn and operator demand for premises is weak, and this is likely to continue in the short term. In the longer term there may be potential to improve this sector. Thetford and Dereham are the most likely locations for this form of retailing.

11.62 In terms of the potential to increase comparison goods market shares in the future, again Thetford and Dereham may have the most potential.

Strategic Urban Extensions

11.63 Strategic urban extensions are planned to the north of Thetford (likely to be around 5,000 to 6,500 dwelling) and to the south of Attleborough (4,000 dwellings). Norfolk County Council's population projections include housing growth and the population of the Thetford and Attleborough zones are expected to increase significantly. Population in the Thetford zone will increase from 57,247 in 2010 to 68,132 in 2026 (+10,885), whilst population in the Attleborough zone will increase from 20,929 in 2010 to 26,062 in 2026 (+5,133). This population growth in reflected in the retail floorspace projections in this report. Most of the population growth occurs after 2016. The need for additional retail floorspace between 2010 and 2016 arises primarily from existing capacity and growth in expenditure per capita, rather than population growth.

11.64 The urban extensions will need to provide local shopping facilities within walking distance for residents, and these facilities will make a contribution to meeting longer term retail floorspace projections between 2016 and 2026. The provision of new local shopping provision to serve these areas should be phased to coincide with the completion of residential units.

11.65 When completed the Thetford Urban Extension area could have a population of around 15,000 people (6,500 dwellings at 2.3 people per dwelling). The Attleborough development could have a population of about 9,000 people. These population figures are higher than the total growth in population envisaged in the Thetford and Attleborough zones because some of the growth in population within new residential developments will be offset by the reduction in average household size within the existing housing stock.

11.66 In Thetford a population of 15,000 in 2026 would generate about £28 million of convenience goods expenditure and about £77 million of comparison goods expenditure. This expenditure could support around 2,800 sq m net of convenience sales floorspace (4,000 sq m gross) and 11,400 sq m net of comparison sales floorspace (15,200 sq m gross) by 2026.

11.67 In Attleborough a population of 9,000 in 2026 would generate about £17 million of convenience goods expenditure and about £50 million of comparison goods expenditure. This expenditure could support around 1,700 sq m net

(2,400 sq m gross) of convenience sales floorspace and 7,400 sq m net (9,900 sq m gross) of comparison sales floorspace by 2026.

11.68 However this scale of retail development will not be required within the urban extensions for the following reasons:

- the retail floorspace projections do not take into account the loss of population (due to reduced average household size) elsewhere in Thetford and Attleborough's catchment areas;
- the retail projections do not reflect the ability of existing and proposed retail facilities to absorb expenditure growth generated by the residential development e.g. growth in turnover efficiencies; and
- the urban extensions are unlikely to be self-contained in retail terms (i.e. will not retain 100% of expenditure from residents living in the development), particularly for comparison shopping.

11.69 Local shopping facilities generally cater for day to day shopping needs, such as top-up food and grocery shopping and lower order comparison shopping e.g. pharmaceutical goods, stationery/cards, florist etc. We believe it is realistic for the urban extensions to retain up to 40% of convenience goods expenditure and about 10% of comparison goods expenditure. On this basis local shopping facilities within the developments could provide:

- Thetford = 1,100 sq m net (1,600 sq m gross) convenience goods;
- Thetford = 1,100 sq m net (1,500 sq m gross) comparison goods;
- Attleborough = 700 sq m net (1,000 sq m gross) convenience goods;
- Attleborough = 700 sq m net (900 sq m gross) of comparison goods.

11.70 These floorspace figures are not mutually exclusive from the town wide floorspace projections shown in Table 11B in Appendix B and Table 9C in Appendix C. Any development within the urban extensions will reduce the town wide floorspace projections.

11.71 In Thetford there is limited scope for convenience sales floorspace during the period 2010 to 2016 (only 330 sq m net – 471 sq m gross). The town wide projection for the period 2016 to 2026 is a further 1,217 sq m net (1,739 sq m gross). The Thetford Urban Extension could meet this emerging post 2016 capacity, if large scale development is not secured within the town centre in the short to medium term (before 2016).

11.72 There is also limited scope for new comparison floorspace in Thetford up to 2016 due to the implementation of commitments. The town wide projection for the period 2016 to 2026 is 8,363 sq m net (11,151 sq m gross). The Thetford Urban Extension could contribute to meeting this emerging post 2016 capacity, again dependant on the scale of development secured within the town centre in the short to medium term (before 2016).

11.73 In Attleborough is short/medium scope for convenience sales floorspace during the period 2010 to 2016 (1,058 sq m net – 1,511 sq m gross). The town wide projection for the period 2016 to 2026 is a further 478 sq m net (683 sq m gross). The Attleborough Urban Extension could accommodate more than 700 sq m net (1,000 sq m gross), if convenience development is not secured within the town centre in the short to medium term (before 2016).

11.74 There is limited scope for new comparison floorspace in Attleborough up to 2016 (574 sq m net – 765 sq m gross). The town wide projection for the period 2016 to 2026 is a further 1,687 sq m net (2,249 sq m gross). Again, the Attleborough Urban Extension could accommodate more than 700 sq m net (900 sq m gross), if comparison development is not secured within the town centre in the short to medium term (before 2016).

11.75 If larger scale development (than the figures above) is proposed in the urban extension areas then the development is likely to serve a wider catchment area, and the tests of impact and the sequential approach would need to be carefully considered. Local facilities should be distributed in a number of local parades/centres to ensure all residents have access to shops within walking distance.

Occupier Demand

11.76 The floorspace capacity projections in this section indicate the theoretical scope for new development based on future expenditure growth. It is also necessary to consider the potential level of demand from operators for new floorspace within Breckland.

11.77 NLP's canvas of 300 operators resulting in 17 responses of which only 3 operators (WH Smith, Morrisons and Barnados) suggested they had a requirement in Breckland, see Appendix 4.

11.78 Current operator demand in Breckland is therefore relatively poor and this perhaps reflects the current economic downturn, with many operators postponing their expansion plans. It may also reflect the general polarisation of retail investment within larger shopping centres.

12.0 Commercial Leisure/Other Town Centre Uses

Introduction

12.1 This section assesses the need and potential for commercial leisure development in Breckland. It considers the potential for improving a range of major commercial leisure uses including cinema/multiplex, tenpin bowling, bingo, nightclubs, private health and fitness clubs and catering, pubs and bars.

The Potential for Leisure and Entertainment Uses

Catchment Potential

12.2 In general, commercial leisure facilities will draw the main part of their trade from residents up to a 20 minutes travel time. Major leisure facilities such as multiplex cinemas, ten-pin bowling centres, ice rinks and family entertainment centres require a large catchment population, and often benefit from locating together or on large out of centre leisure parks.

12.3 Breckland has a reasonable catchment population. There are approximately 170,000 people within the defined study area. This catchment population has good access to major leisure facilities in other large towns and cities, i.e. Bury St Edmunds, Norwich and Cambridge. The proximity of major leisure facilities in these larger settlements may limit the potential for major commercial leisure facilities within the district.

The Cinema Market

12.4 Cinema admissions in the UK declined steadily during the 1950s, 1960s and 1970s, a period when the ownership of televisions increased significantly. Cinema admissions continued to decline in the early 1980s, but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. The cinema industry reached a plateau in 2005 following a slight recovery in 2004 with a net gain of 24 operating screens (still a virtual standstill compared to the 100-200 screens added at the turn of the decade). Total admissions in 2007 were 162.4 million, slightly higher than in 2005 (157 million) and significantly lower than in 2004 (164.6 million).

12.5 Cinemagoing 17 published in April 2008 by Dodona Research reported that 2007 was a fairly flat year for the cinema business in the United Kingdom and that 2008 would also be another fairly flat year but it anticipated that 2009 would be a better year. As the industry is now dominated by three main operators (Odeon, Cineworld and Vue), the emphasis is shifting from consolidation to modest physical expansion. This is the same for their two smaller rivals, The Showcase owned by National Amusements and the Ward Anderson group of companies which own Empire. Multiplex cinemas now dominate the market with over 70% of available screens in 2007.

12.6 Cinemagoing 17 forecast that total admissions would increase by about 5% between 2007 and 2012, peaking in 2009 at 175 million admissions and then levelling out to 170 million admissions in 2010. Forecasts anticipated a net addition of 136 screens in 2007, 180 in 2008, 70 in 2009 and 50 in 2010. Compared to the last decade these figures represent a considerable slowing of growth, just over 2% compared to past growth of 5.5%. Cinemagoing 17 forecast that by 2012 more than 386 screens will be added to the 3,514 operating in 2007. According to predictions in Cinemagoing 17, British cinema-goers will pay nearly £1.1 billion for cinema tickets in 2011, this is due to a strong upcoming film product, benefits from digital projection and a turn in the investment cycle to new cinemas.

12.7 Breckland has two small cinemas, Hollywood Cinema in Dereham (3 screens) and the Icenima in The EcoTech Centre in Swaffham (1 screen). Major competing centres, including Bury St Edmunds, Stowmarket, Norwich and Cambridge have several large multiplex facilities as outlined below, which may restrict the catchment area of potential additional cinema provision in Breckland:

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

12.8 The household survey results indicate that 46% of respondents in the study area visit cinemas. The highest proportion of respondents (41%) visit the cinema in Norwich, followed by Bury St Edmunds (29%). Within the study area 21% of respondents visit Dereham to go to the cinema. No respondents interviewed visit the cinema in Swaffham.

12.9 To assess the demand for cinema admissions within the study area, we have assumed that Breckland could increase its existing share of cinema trips in the study area from only 21% (as suggested by the household survey results) to 50% in the future.

12.10 The catchment population has been converted into a total number of cinema admissions per annum based on the national visitation rate (2.67 per person in 2007). The national visitation rate at 2007 has been used to predict future demand. The total number of cinema admissions has been converted into an optimum number of cinema screens. The results are shown in Table 12.1 below.

Table 12.1 Cinema Potential in Breckland

	2010	2016	2021	2026
Catchment Population	169,773	175,828	181,621	187,567
Market Retention	21%	50%	50%	50%
Visits Per Annum	2.67	2.67	2.67	2.67
Total Visits Per Annum	**95,192**	**234,730**	**242,464**	**250,402**
Optimum Visits Per Screen	75,000	75,000	75,000	75,000
Screen Potential	**1.3**	**3.1**	**3.2**	**3.3**
Existing Screen	**4**	**4**	**4**	**4**

12.11 Existing provision within Breckland is four screens. The analysis suggests that even based on an increase retention rate of 50%, there is sufficient cinema facilities in Breckland District for the foreseeable future. Thetford is the most obvious location for a new cinema, but the market potential may be constrained by the existing 9 screen facility in Bury St Edmunds.

Private Health and Fitness Clubs

12.12 The UK health club market expanded rapidly as public awareness about personal fitness has increased. Business in Sport and Leisure (BISL) 2009 indicates healthy growth across the industry with the Fitness Industry Report stating that by March 2008, there were 5,755 combined public and private sector fitness sites across the UK. Since 2007, 41 new facilities had opened. The total number of UK health and fitness members at public gyms and private health clubs is now over 7 million.

12.13 About 12% of the population are now members of a private health club or registered users of a leisure centre gym in the UK, compared with just 8.9% in 2002 and this growth looks set to continue. The household survey results suggest that 19.9% of households in the study area visit health and fitness clubs, which is higher than the national membership rate. However it should be noted that not all members of these participating households will be members of health clubs (e.g. children) therefore the membership rate is likely to be less than 19.9%.

12.14 Private health clubs in the UK range from small independent clubs to large operators such as Nuffield Health, David Lloyd, Esporta, Fitness First, Virgin Active, Bannatyne and LA Fitness.

12.15 Private health clubs had 4.2 million members in 2007 (1,375 members per club). The largest health clubs can have memberships of approximately 4,000 people. However, independent clubs remain a strong presence in the private sector market running 55% of all private clubs. Of the 126 new private health clubs that have opened since January 2006, 58% were independent clubs and 42% were owned by multiple operators. Public sector sports centres are also important, and the market increased significantly between January 2006 and March 2007, with 106 new facilities opened and in terms of like-for-like membership growth rates, the sector saw an impressive 4.6% growth.

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

- Barretts Health & Fitness, High Street, Dereham;
- Everybody Health & Fitness, Whitsands Road, Swaffham;
- Body Concept, Roman Way, Thetford;
- Vinnies Gym, Queens Square, Attleborough;
- Bodywise Health Studio, Swaffham;
- New Image Health Studio, Attleborough;
- Watton Sports & Social Club, Watton;
- Old Hall Country Club and Leisure Centre, Thetford; and
- Spartacus Gym, Thetford.

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

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

12.18 In total Breckland has at least 13 public and private clubs. The household survey indicates that 21% of respondents or their families visit a health/fitness club. Of these, 58% did so at destinations within the main towns in the District.

12.19 The study area adult population is approximately 130,000 in 2010, which could generate demand for about 15,600 public and private membership places, based on the national average membership rate (12%). This implies an average of 1,200 members per club, which is slightly below the national average for private fitness clubs (1,375 members). This suggests there may be limited demand for additional provision of health and fitness clubs in the District.

12.20 A future increase in membership rates and/or population growth could generate additional demand. Population growth in the study area up to 2016 (+5,000 adults) could generate demand for a further 600 places, and growth up to 2026 could support 1,700 places. There may be scope for additional health club facilities in the future due to growth in population and participation rates.

Tenpin Bowling

12.21 Tenpin bowling grew quickly in the UK in the 1960s. However, the complex scoring system, lack of investment and deterioration exacerbated a significant decline in the 1970s. A resurgence of interest in tenpin bowling during the late 1980s and computer scoring led to a second boom. The tenpin bowling sector experienced steady growth, 13% real growth between 1997 and 2002. Mintel predicted the value of the tenpin bowling market would increase from £245 million in 2002 to £324 million by 2007.

12.22 There were 269 tenpin bowling centres (5,005 lanes) in the UK in 2007, approximately one lane per 12,000 people. Bowling centres now tend to be part of major leisure developments that include multiplex cinemas, restaurants and nightclubs offering a choice of leisure and entertainment activities.

12.23 Tenpin bowling centres require large buildings of between 2,300 to 4,200 sq m (25,000 to 45,000 sq ft) and are generally located in towns with a population of over 150,000 people.

12.24 Breckland has one bowling alley, Strikes in East Dereham (12 lanes). Within other towns outside the study area there is: Bowlthorpe in Norwich (30 lanes), Hollywood Bowl (closed for maintenance but soon to re-open) in Norwich (26 lanes), Ten Pin Ltd at Cambridge Leisure Park (28 lanes), Strikes in Kings Lynn (14 lanes), Bury Bowl in Bury St Edmunds (12 lanes) and Fakenham Superbowl (6 lanes).

12.25 The household survey indicates that residents who visit bowling facilities in the District mainly go to Dereham (43% of respondents), followed by Norwich (21% of respondents). The household survey results suggest that about 28% of households in the study area visit tenpin bowling facilities. The study area population as a whole could theoretically support about 14 lanes, based on one lane per 12,000 people, or 16 lanes in 2026. There is only theoretical capacity for an additional four lanes within the study area up to 2026, allowing for 100% trip retention.

Bingo

12.26 The bingo market peaked in the mid-1970s, with almost 2,000 clubs nationwide. Since then the sector has struggled to compete with other leisure activities, including the impact of the National Lottery. The decline has bottomed out and attendance figures have remained steady since the late 1990s, and revenues and profits have started to increase.

12.27 The UK had 676 commercial bingo clubs in 2005, but in March 2008 this had decreased to 616 commercial bingo clubs, approximately one club per 100,000 people. The amount staked on bingo had continued to rise in previous years but peaked in 2006 at £1,826 million and fell to £1,620 million in 2008.

12.28 Bingo clubs attracted 79 million admissions in 2005 (source: Mintel), about 1.75 admissions per adult each year. On average each club attracted 117,000 admissions in 2005 (about 2,250 admissions per week). The average participation rate (adults) was 6.9% in 2004 (source: Mintel), split 2.8% regular players and 4.1% occasional players. Mintel forecasts that admissions will decline from 79 million in 2005 to 68 million in 2010, although the average spend per head will increase from £26.90 to £38.40.

12.29 Mecca and Gala are the main bingo operators, controlling over half of the UK market. Marketing of the bingo sector has been more proactive in recent years and Gala and Mecca have invested in premises, moving out of dated premises (i.e. converted cinemas), into purpose built units. Bingo clubs have become increasingly sophisticated, and have actively sought to attract all age groups.

12.30 The bingo sector usually prefers central locations that are accessible by public transport and by foot. Major bingo operators, such as Mecca and Gala, require buildings of between 2,000 to 3,000 sq m, capable of seating up to 2,000 people, with a catchment population of 50,000 to 70,000 people within freestanding towns (source: BISL).

12.31 The household survey results indicated that only 8% of households in the study area visit bingo facilities, of which 44% visited Thetford, and 17% visited Norwich. The study area population (about 130,000 adults) could generate over 227,000 admissions based on the national participation rate (1.75 per adult), compared with the average of 113,000 admissions per club. The study area has two bingo clubs, Breckland Bingo and Social Club, Thetford and Winners Bingo and Social Club, Thetford. These figures suggest existing bingo provision in the study area is sufficient to meet demand.

Nightclubs

12.32 The value of the nightclub market (permanent venue offering dancing in return for an admission fee) declined from £2.16 billion in 1998 to £1.77 billion in 2002 (source: Mintel - Nightclubs). There are approximately 1,750 nightclubs in the UK, approximately one per 30,000 people.

12.33 The sector has faced increasing competition from late night pubs and bars, with no admission fees. The BISL envisages a continued period of rationalisation and price competition. However, the forecast trend of significant growth in the 18-24 year old age group is expected to provide a growing market.

12.34 Large nightclubs (capacity up to 2,000 people) are generally located in large towns with a population of over 100,000 people. There are a small number of late night venues in Breckland, including Club Ice in Thetford, but there are no large branded clubs within the District. There are venues that hold live music events.

12.35 The household survey results indicated that only 7% of households in the study area visit nightclubs of which 64% of these households last visited Norwich, followed by Bury St Edmunds 13%. Within the District, only 4% of respondents visit nightclubs in Dereham and 3% go to Thetford. There appears to be sufficient provision of nightclubs in the District, especially given the provision of late night venues in the surrounding larger towns.

Casinos

12.36 In February 2008 an order was laid before Parliament to allow 16 local authorities to license casinos, but the Government stated that regional casino licences would not be allowed at this stage.

12.37 Operators now have to think in more detail about the catchment area of their casinos and the level of existing or future competition in a given area. Key catchment areas will have to be in or within the near vicinity of a large centre, such as a major town or city, with a drive time catchment area of approximately 30-40 minutes and as close to the centre of the catchment area as possible, with good transport links. The proximity of other established commercial uses will also be a key factor for operators when looking at locations for casinos.

12.38 There were 144 licensed casinos operating in Great Britain at March 2008, about one casino per 400,000 people. Attendance at casinos by members and guests increased by 6.6% from the previous year to over 16 million trips.

12.39 There are no casinos within the study area, but Great Yarmouth is one of only 16 authorities with a licence for a large casino. The main centres within the District are unlikely to have a catchment population large enough to support a casino. It is also likely that casino operators would prefer to locate in the surrounding larger towns of Greta Yarmouth, Norwich and Cambridge.

Bars and Restaurants

12.40 Food and drink establishments (Class A3, A4 and A5) including restaurants, bars and pubs have supported other major leisure uses on leisure and retail parks. Within town centres the demand for A3/A4/A5 uses has increased including a significant expansion in the number of coffees shops, such as Starbucks, Costa coffee and Coffee Republic.

12.41 National branded pub/restaurant chains have been investing heavily, although not exclusively in larger centres. Many chains such as All Bar One, JD Wetherspoons and Yates Wine Bars have sought representation in smaller centres close to residential communities.

12.42 National information available from Goad Plans indicates that the proportion of non-retail uses within town centres across the country has increased over the last decade as shown in Table 13.2. The proportion of Class A1 retail uses in Goad town centres has decreased by 12% between 1994 to 2008 (7.2

percentage points), whilst non-retail uses including Class A2, A3 and non-retail (service) A1 uses have all increased.

Table 12.2 GB Goad Plan Town Centres Use Class Mix

Type of Unit	% Change 1994 to 2009	Proportion of Total Number of Units (%)			
		1994	2000	2005	2009
Class A1 (Retail)	- 13.3	61.2	59.1	56.4	54.0
Class A1 (Services)	+ 42.0	6.9	8.2	9.6	9.8
Class A2	+ 5.9	8.5	8.9	8.9	9.0
Class A3/A5*	+ 57.6	9.2	11.2	13.7	14.5
Miscellaneous	+ 30.0	1.0	1.4	1.4	1.3
Vacant/under Const.	- 20.0	13.2	11.2	10.1	11.4
Total	**-**	**100.0**	**100.0**	**100.0**	**100.0**

Source: Goad Centre Reports *excludes Bars/Public houses (A4)

12.43 However the number of bars and pubs has continued to decline in recent years according to figures produced by the Department of Culture, Media and Sport.

12.44 The Beer Orders were acts passed by the government in the early 1990s which saw a massive expansion of themed bar operators and pub restaurants, such as JD Wetherspoons. These outlets generally require a minimum 50,000 population and are usually located on main streets or secondary positions close to prime retail, commercial and other leisure users. Operators usually require large premises of 250 - 1,500 sq m, in close proximity to public car parks and good transport links.

12.45 Themed restaurants also expanded rapidly in the 1990s. These operators have located in out of centre retail/leisure parks as well as good secondary/primary high street locations. Fast food operators such as McDonalds and Burger King have expanded the number of drive through outlets, and town centre outlets. Outlets have been developed within retail/leisure parks or on busy roads. Outlets require sites of approximately 0.2 hectares.

12.46 Growth in Class A3 to A5 uses within town centres may continue in the future, and will compete for shop premises with other town centre uses. A balance between Class A1 and Class A3 to A5 uses needs to be maintained.

12.47 The land use tables provided by Breckland Council indicate that there are 105 A3-A5 uses in total across the District, including 20 public houses (A4), 52 restaurants and cafes (A3) and 33 hot food takeaways (A5), with a representation of each in every town centre.

Theatres

12.48 The household survey indicated that 47% of respondents in the study area visit theatres. The most popular destination was Norwich with 73% of respondents, followed by London with 12% of respondents. There are no theatres within the study area therefore there may be some scope for new privately owned theatres in Breckland, but this may be limited due to the accessibility and quality of theatres in the larger surrounding towns. However the proposed refurbishment of Dereham Memorial Hall may provide potential to accommodate touring theatre companies.

Conclusions on Commercial Leisure

12.49 Breckland has a reasonable range of commercial leisure, entertainment and culture facilities, in relation to the size of its main towns and catchment population. Residents in the study area also have good access to facilities outside the District, including Norwich, Bury St Edmunds and Cambridge which may limit market potential for further facilities.

12.50 Most of the key sectors are provided for including cinemas, ten pin bowling, bingo, health clubs and nightclubs. There are no theatres or casinos within the study area. The assessment suggests that most current levels of facilities are sufficient to support the catchment population. There may be future potential demand for an additional health club in line with population growth.

13.0 Scope for Accommodating Growth

Floorspace Projections

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

- major retail developments in competing centres;
- the re-occupation of vacant retail floorspace;
- the availability of land to accommodate new development;
- the reliability of long term expenditure projections, particularly after 2016;
- the effect of Internet/home shopping on the demand for retail property;
- the limited current level of operator demand for floorspace in Breckland;
- the likelihood that Breckland's existing market share of expenditure will change in the future in the face of increasing competition;
- the potential impact new development may have on existing centres.

13.2 The long term floorspace projections (up to 2021 and beyond) shown in Section 11.0 should be treated with caution and should only be used as a broad guide, particularly when translated into the development plan allocations or when used to guide development control decisions. Long term forecasts may be subject to change due to unforeseen circumstances. Projected surplus expenditure is primarily attributable to projected growth in spending per capita. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under-review.

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

13.4 The quantitative and qualitative assessment of the potential capacity for new retail floorspace within the previous sections suggests that there is scope for new retail development within Breckland. This section examines the opportunities for accommodating this projected growth and assesses potential to accommodate this floorspace.

13.5 The projections up to 2016 suggest there is scope for about 3,100 sq m net (4,000 sq m gross) of convenience floorspace and 3,100 sq m net (4,200 sq m gross) of comparison floorspace. In terms of total retail floorspace there is scope for around 8,200 sq m gross by 2016. These figures are over and above commitments as at August 2010.

13.6 The projections up to 2021 suggest there is scope for about 4,000 sq m net (5,800 sq m gross) of convenience floorspace and 11,600 sq m net (15,500 sq m gross) of comparison floorspace. In terms of total retail floorspace there is scope for around 21,300 sq m gross by 2021.

Accommodating Future Growth

13.7 The sequential approach suggests that designated town centres should be the first choice for retail and leisure development. In considering this important issue the following factors should be assessed.

- What is the locational area of need the development seeks to serve and what existing centre could potentially fulfil the identified area of need?
- Is the nature and scale of development likely to serve a wide catchment area e.g. a large part of Breckland District?
- Is a site available in one of the designated centres, including vacant premises and will this site meet the identified need?
- If the development has a more localised catchment area, is a site available in a local centre and will this site meet the identified need?

13.8 All development should be appropriate in terms of scale and nature to the centre in which it is located.

13.9 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. A growth rate of 2% per annum is assumed for comparison floorspace after 2011, and 0.3% per annum for convenience floorspace. The adoption of these growth rates represents a balanced approach. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

13.10 There were 61 vacant shop units within the five main centres in Breckland District, a vacancy rate of about 8.5%, which is slightly below the Goad national average (11.4%). The vacancy rate is particularly high in Swaffham (13.9%) and very low in Attleborough (3.0%). The amount of vacant floorspace is about 4,200 sq m gross.

13.11 Vacant premises could help to accommodate growth. For example, if the current vacancy level fell from 8.5% to 5% then the number of reoccupied units would be 25, which could accommodate about 1,700 sq m gross of Class A1 to A5 retail space. Based on existing vacancy levels, this potential re-occupied space could be distributed as follows:

- Thetford 400 sq m gross;
- Dereham 700 sq m gross;
- Swaffham 400 sq m gross; and
- Watton 200 sq m gross.

13.12 If this reduction in vacant units can be achieved then the overall retail floorspace projection up to 2016 would reduce from 8,200 sq m gross to 6,500 sq m gross. The 2021 floorspace projection would reduce from 21,300 sq m gross to 19,600 sq m gross.

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

Potential Development Opportunities

13.14 The 2004 Study identified a long list of 23 potential retail development (town and edge of centre sites). Of these sites 19 were identified as having ‘good’ or ‘reasonable’ potential for retail and/or leisure uses.

13.15 Key changes relating to the potential availability of sites since the 2004 study is summarised below.

Thetford

13.16 Six potential development sites were identified in Thetford in the 2004 Study. The former Kwik Save unit has now been sub-divided into two units and reoccupied, but still has redevelopment potential. The status of three of the remaining five sites is unchanged since 2004, and still have ‘good’ or ‘reasonable’ potential to accommodate future development, as follows:

- Carnegie Community Hall up to 1,000 sq m gross;
- Riverside Walk up to 2,000 sq m gross;
- Tanner Street Car Park up to 500 sq m gross.

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

13.18 The Minstergate area was identified as two separate opportunity sites in the 2004 study, including the former Kwik Save unit. The area is now identified as an opportunity area in the Preferred Options Area Action Plan and is within the Primary Shopping Area, and part of the site has emerging proposals for a new bus interchange. The vacant buildings between Minstergate and St Nicholas Street were identified as having potential to be refurbished and reused for commercial uses (up to 1,000 sq m gross). The area south of Minstergate is occupied by Wilkinson and Poundstetcher, but retail/leisure use could be intensified i.e. two levels. If comprehensively redeveloped the area south of Minstergate could accommodate an additional 3,000 sq m gross of commercial floorspace. This floorspace potential will reduce if the bus interchange proposals are implemented.

13.19 The Bridge Street Car Park was identified as a long term opportunity with 'poor' development potential. However, since the 2004 Study the Anchor Hotel has become vacant and an enlarged development site (about 0.7ha) could be assembled if the bus station is relocated. This site could accommodate up to 4,000 sq m gross of retail/commercial space at ground floor level, and is located within the Primary Shopping Area, but we understand this enlarged site may not be available because an education centre use is proposed on the hotel site. If the education use is implemented there will be limited potential for new retail uses.

13.20 There may be further potential at Thetford Retail Park. The south west part of the retail park is occupied by vacant/relative old warehouse premises and the adjacent site is occupied by out-buildings. Thetford Retail Park is located outside the Primary Shopping Area but is within the town centre boundary. In terms of the sequential approach for retail development it is in an edge of centre location. There may be potential to provide additional retail warehouse units in the south west corner of the retail park, by incorporating buildings on Grove Lane. Intensification at Thetford Retail Park could provide an additional 3,000 sq m gross.

13.21 In total opportunities in Thetford town centre could provide up to 13,500 sq m gross of additional floorspace.

13.22 In the longer term (between 2016 and 2026) local shopping facilities within the Thetford Urban Extension area could assist in meeting some of the projected need for new retail floorspace, up to 3,000 sq m gross in total by 2026.

Dereham

13.23 Six potential development sites were identified in Dereham in the 2004 Study. The Georges Road Car Park in isolation was identified as having 'poor' redevelopment potential due to the loss of car parking. The former Dereham Library is no longer available. The Post Office/Telephone Exchange is now considered unlikely to become available.

13.24 The status of the remaining sites remains broadly unchanged, and they still have 'good' or 'reasonable' potential to accommodate future development, as follows:

- TA Centre/Car sales garage — up to 2,500 sq m gross;
- Land north of Georges Road — up to 2,000 sq m gross; and
- Inland Revenue — up to 200 sq m gross.

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

13.26 No additional development opportunities have been identified. In total these three opportunities in Dereham town centre could provide up to 4,700 sq m gross of additional floorspace.

Attleborough

13.27 Three potential development sites were identified in Attleborough in the 2004 Study, as follows:

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

13.28 The Sainsbury/Telephone Exchange is now considered unlikely to become available. The status of the two other sites remains broadly unchanged, and both sites are located within the Primary Shopping Area. No additional development opportunities have been identified in the town centre, but the former Gaymer's Brewery site could accommodate out-of-centre retail uses, subject to satisfying tests within PPS4. In total the two opportunities in Attleborough town centre could provide up to 1,500 sq m gross of additional floorspace.

13.29 In the longer term (between 2016 and 2026) local shopping facilities within the Attleborough urban extension area could assist in meeting some of the projected need for new retail floorspace, up to 2,000 sq m gross in total by 2026.

Swaffham

13.30 Only one potential development site was identified in Swaffham in the 2004 Study. The Post Office/Telephone Exchange was identified as having 'reasonable' development potential in the medium to long term, and could provide up to 1,000 sq m gross. The Telephone Exchange part of the site is now considered unlikely to become available, but the adjacent Sixth Form Centre could provide an alternative development site with the Post Office. This amended site could accommodate up to 1,000 sq m gross.

Watton

13.31 Seven potential development sites were identified in Watton in the 2004 Study. Land east of Chaston Place was identified as having 'poor' development potential due to its secondary location. The site east of the Tesco store has planning permission to extend the food store, and this commitment is accounted for within the retail capacity figures. The only site still potentially available for retail development is the Memorial Car Park, which could provide up to 500 sq m gross. Land south of the High Street has been developed for residential use (Saxon House) and land south of Tesco is no longer available.

14.0 Policy Review

Local Development Framework Policies

14.1 The Core Strategy (Policy CP7) sets out floorspace projections for the District, based on the 2007 Retail Needs Study Update. These projections should be updated in future reviews of the Core Strategy, in the light of the results from this 2010 Study. The next review of the Core Strategy should update and roll forward the retail floorspace projections, as follows:

Centre	Additional Retail Sales Floorspace Sq M Net			
	Comparison		Convenience	
	2010-2016	2016-2021	2010-2016	2016-2021
Thetford	-	3,800	300	700
Dereham	1,700	3,200	1,700	100
Attleborough	600	600	1,100	100
Swaffham	300	400	-	‘
Watton	500	500	-	-
Total	**3,100**	**8,500**	**3,100**	**900**

NB - This study provides projections to 2026, but given the uncertainties regarding very long term projections it is not necessary to plan for this growth at this stage. Longer term projections will need to monitored and updated as necessary.

14.2 These floorspace figures do not take into account any development proposals without planning permission or the reoccupation of vacant shop units described in Section 13.

14.3 PPS4 has removed the needs test for out-of-centre retail development and has introduced an amended impact test. The implementation of Core Strategy Policy CP9 will need to reflect the new guidance in PPS4.

Scale of Development

14.4 Based on the scale and role of centres within Breckland District and the retail floorspace projections within this report, large-scale development which serves a significant part of the District should be concentrated within Thetford or Dereham town centres. These are the largest centres and should continue to act as the principal centres within the District. Generally all retail developments of 2,000 sq m gross or more should be concentrated in Thetford or Dereham. All development proposals of this scale would still be tested against subject to the tests in PPS4 e.g. impact and the sequential approach, if they are located outside the designated town centres.

14.5 Developments of between 2,000 to 500 sq m gross may be appropriate in Attleborough, Swaffham and Watton, where development complements the two main town centres by providing for convenience food shopping and day to day comparison shopping facilities and other services. Other shopping facilities outside these main centres should only cater for top-up and basket convenience shopping and services, and these developments are likely to be less than 500 sq m gross.

14.6 PPS4 suggests the impact of retail developments of 2,500 sq m gross or above may need to be considered. Policy CP7 appears to be consistent with this advice. Again, based on the scale and role of centres within Breckland District and the retail floorspace projections within this report, we believe the impact of smaller development proposals could raise concerns. A development of 2,500 sq m gross (convenience or comparison) could exceed or account for a significant proportion of the projected need for retail floorspace in the five main towns up to 2016 or even 2021. The convenience goods floorspace projections for each town up to 2016 range from 0 to 2,500 sq m gross. The comparison goods floorspace projections for each town up to 2016 range from 400 to 2,300 sq m gross. These projections suggest that retail developments under 2,500 sq m gross could have a significant impact on town centres in Breckland District, and the PPS4 threshold is not appropriate for local circumstances.

14.7 We believe the impact of all out-of-centre retail applications of 1,000 sq m gross or more should be assessed in Dereham and Thetford. In other settlements impact assessments should be provided for out-of-centre retail schemes of 500 sq m gross or more. If considered appropriate the Council will need to include these recommendations within the next stages of the LDF.

14.8 The sequential approach indicates that town, district and local centres are the preferred location for new retail/leisure/cultural development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of development proposed and the catchment area the development seeks to serve.

14.9 In general development within the village and local centres should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a centre. Local centres within the main towns, i.e. in the urban area but outside the town centre serving that town, should primarily serve walk-in catchment areas.

Town Centre Boundaries and Frontages

14.10 The adopted Core Strategy and Development Control Policies identify Town Centre Inset Areas, Primary and Secondary Frontages and Primary Shopping Areas for Thetford, Dereham, Attleborough, Swaffham and Watton. We have reviewed these definitions in line with new policy in PPS4.

14.11 Policy EC3 in PPS4 suggests councils should define the extent of town centres and the primary shopping area on proposals maps. The proposals map should distinguish between realistically defined primary and secondary frontages.

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

14.12 Policy EC3 in PPS4 also suggests where reversing the decline of existing centres is not possible, Councils may consider reclassifying centres at a lower level within the hierarchy and this may include allowing retail units to change to other uses.

14.13 Annex B of PPS4 provides definitions of the different types of location, as follows:

Town Centre: defined area, including the primary shopping area and areas of predominantly leisure, business and other main town centre uses within or adjacent to the primary shopping area. The extent of the town centre should be defined on the proposals map.

Primary Shopping Area: defined area where retail development is concentrated (generally comprising the primary and those secondary frontages which are contiguous and closely related to the primary shopping frontage). The extent of the primary shopping area should be defined on the proposals map. Smaller centres may not have areas of predominantly leisure, business and other main town centre uses adjacent to the primary shopping area, therefore the town centre may not extend beyond the primary shopping area.

Primary Frontage: primary frontages are likely to include a high proportion of retail uses.

Secondary Frontage: secondary frontages provide greater opportunities for a diversity of uses.

14.14 These PPS4 definitions have remained relatively unchanged from the definitions in PPS6.

14.15 Development Control Policy DC9 seeks to maintain a high proportion (75%) of Class A1 use within the primary shopping frontages, which is consistent with the Primary Frontage definition set out above.

14.16 Policy DC9 allows greater flexibility in Secondary Frontages with up to 50% in non-A1 use.

14.17 In our view Policy DC9 is consistent with the latest guidance in PPS4.

14.18 Policy CP7 indicates that retail proposals will be focused within the defined Primary Shopping Area. Again this approach is consistent with PPS4. The Primary Shopping Areas will be the first preference for retail development, whilst other main town centre uses should be focused within the town centre boundaries.

Thetford Town Centre

14.19 Within Thetford town centre the primary frontages are concentrated along King Street, Market Place, Guildhall Street, Well Street and the north side of Riverside Walk. These are the main concentrations of Class A1 use within the town centre.

14.20 The only defined secondary frontages are on Whitehart Street and Bridge Street. The south side of Riverside Walk is not a designated frontage. This area has a high level of vacancy. This are could be designated as Secondary Frontage if the Council wish to re-establish retail and other town centre uses in this area.

14.21 The Primary Shopping Area has been generously drawn because it extends beyond the area covered by primary and secondary frontages. This approach is appropriate if the Council is seeking to encourage retail development into new areas i.e. MInstergate, Bridge Street car park and Raymond Street.

14.22 The town centre boundary has also been widely drawn to include other town centre uses, such as the office uses, fire and police stations, library, Thetford Retail Park, hospital and surgery.

Dereham Town Centre

14.23 Within Dereham town centre the primary frontages are concentrated along the High Street, Wright's Walk, Norwich Street, Nelson Place, Church Street (east end) and the Market Place. Secondary frontages are defined at the top end of the High Street around the Memorial and Quebec Street (west side).

14.24 The primary and secondary frontages appear to be appropriately drawn, but there may be potential to define retail uses on Norwich Street (east of the Commercial Road junction) as secondary frontage.

14.25 The Primary Shopping Area has been generously drawn because it extends beyond the area covered by primary and secondary frontages. This approach is appropriate if the Council is seeking to encourage retail uses/development into new areas i.e. Wellington Road (south side), Georges Road (north side).

14.26 The town centre boundary has also been widely drawn to include other town centre uses, such as the police station, TA Centre, Morrisons and car parks.

Attleborough Town Centre

14.27 Primary frontages in Attleborough are concentrated along the High Street, Exchange Street and Church Street. All of the main retail frontages are designated as primary frontages with the exception of the south side of Exchange Street, Queens Road and around Town Hall Square, where there is a concentration of Class A2 to A5 uses. The primary and secondary frontages appear to be appropriately drawn. However, commercial premises at the west end of Connaught Road could be included as secondary frontage, and the

Lloyds pharmacist and M&Co store could be included within the primary frontage.

14.28 The Primary Shopping Area, in our view correctly, includes the Sainsbury and Aldi stores, as these are major concentrations of retail space within Attleborough. The Primary Shopping area broadly reflects the defined primary and secondary frontages.

14.29 The town centre boundary closely follows the primary shopping area, with the exception of the area to the south along Connaught Road.

Swaffham Town Centre

14.30 Primary frontages in Swaffham are concentrated around the Market Place. There are small sections of secondary frontages that have concentrations of A2 and other non-A1 uses. The primary and secondary frontages appear to be appropriately drawn.

14.31 The Primary Shopping area broadly reflects the defined primary and secondary frontages, but includes the Netto stores and other uses along Lynn Street. This approach is appropriate if the Council is seeking to encourage retail development in this area.

14.32 The town centre boundary has also been widely drawn to include other town centre uses, such as the Church, Medical Centre, library, school and car parks.

Watton Town Centre

14.33 Primary frontages in Watton are concentrated in the middle section High Street. The only defined secondary frontage is on the north side of the High Street at the western end of the centre, where there is a concentration of Class A2 to A5 uses.

14.34 The Primary Shopping area broadly reflects the defined primary and secondary frontages. it correctly includes the Tesco store. The primary shopping area also includes other uses such as the police station, library, Queens Hall and residential uses on Norwich Road. This approach is appropriate if the Council is seeking to encourage retail development into these areas.

14.35 The town centre boundary closely follows the primary shopping area, with the exception of the residential area to the south in the Durrants Yard area and residential uses on Oadman Way to the north of the centre.

Future Strategy Implementation and Monitoring

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

- application of guidance within PPS4, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises;
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

14.37 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail development up to 2016, with longer term forecasts up to 2021 and 2026.

14.38 We recommend that this retail capacity study should be updated in 3-4 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities; and
- implemented development within and around the study area.

14.39 These key inputs into the retail capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended. It may be necessary to undertake an updated household survey to address the implementation of major developments that will significantly alter shopping patterns in the District.

15.0 Conclusions and Recommendations

15.1 This report provides a District wide needs assessment for retail and commercial leisure uses in Breckland District. It provides a guide to the shopping and leisure needs of the District up to 2016, 2021 and 2026. The principal conclusions of the analysis contained within this study are summarised below.

Meeting Shopping Needs in the District

15.2 In order to meet projected growth in expenditure, there is a need for additional shopping and service facilities. Future planning policy and site allocations should seek, in line with PPS4, to identify opportunities to accommodate growth, within 5 year periods.

15.3 The floorspace projections shown in this report provide broad guidance and should be used as an indicator when assessing major retail proposals. Applicants proposing retail developments should base their supporting retail need and impact assessment on the approach adopted in this study, updated as necessary.

15.4 Meeting the projections between 2010 and 2016 remains the priority. The projections should not be considered to be maximum or minimum limits or targets, particularly when used to guide development control decisions. However, the projections provide a broad quantum of floorspace likely to be required and the potential phasing of development, which will assist in identifying development allocations.

15.5 Floorspace projections should not inhibit competition between retailers when located within centres, subject to the consideration of scale and impact. However, if an out-of-centre proposal exceeds the floorspace projections then the need for the proposal and impact will need to be carefully considered.

15.6 Long term forecasts up to 2021 and 2026 may be more susceptible to change, due to unforeseen circumstances. Projected surplus expenditure beyond 2016 is attributable to projected growth in spending per capita, extrapolated from past growth projections. If the growth in expenditure is lower than that forecast then the scope for additional space will reduce. Long term projections should be monitored and kept under review. The implications of major retail development within and surrounding the District should also be monitored and the effects proposals may have on the demand for additional development in Breckland District should be considered carefully.

15.7 Local shopping facilities within the Thetford Urban Extension and Attleborough urban extension areas could assist in meeting some of the projected need for new retail floorspace during the period 2016 to 2026, in the form of a number of local centres/parade

Accommodating Future Growth

15.8 The sequential approach suggests that town centres should be the first choice for retail development. In Breckland District the preferred location for retail development needs to be carefully considered, particularly for major development which may have an extensive catchment area.

15.9 The existing stock of premises may have a role to play in accommodating projected growth. The retail capacity analysis in this report assumes that existing retail floorspace can, on average, increase its turnover to sales floorspace densities. The floorspace projections reflect these assumptions. In addition to the growth in sales densities, vacant shops could help to accommodate future growth.

15.10 Vacant units could also help to accommodate growth in the short term. The strategy should seek to reduce shop vacancy levels to about 5%, and these reoccupied units could accommodate about 1,700 sq m gross of commercial space i.e. Classes A1 to A5.

15.11 Growth in sales densities and vacant shops will not be able to accommodate all the future growth in retail expenditure, therefore potential development sites need to be identified through the Local Development Framework process to accommodate growth up to and beyond 2016.

Convenience Goods Development

15.12 On the basis of the assumption that existing convenience retailers and commitments trade at national average turnover levels, the quantitative capacity analysis indicates there is potential for further convenience goods floorspace (3,100 sq m net – 4,400 sq m gross) within the District up to 2016, increasing to 4,000 sq m net (5,700 sq m gross) by 2021. Most of this floorspace should be spread between Thetford, Dereham and Attleborough.

15.13 Within Swaffham and Watton, the projections suggest there will be limited need for further convenience floorspace for the foreseeable future.

15.14 In Thetford there is limited scope for additional convenience sales floorspace up to 2016. Vacant units and development opportunities in the town centre should be capable of meeting this need. There is no need for further large food store in Thetford before to 2016. Between 2016 and 2026 there is emerging capacity for 1,200 sq m net (1,700 sq m gross) of convenience floorspace. This longer term potential should be provided within local shopping facilities within the Thetford Urban Extension to serve new residential areas, in the form of local/neighbourhood centres which should include small convenience stores (under 500 sq m net). LDF should make provision for local shopping facilities in the urban extension. The scale of centres/retail development within the urban extension should be monitored and kept under-review. It is possible a district centre with a larger food store (1,000 to 2,000 sq m net) could be provided. The impact of retail development on the town centre would need to be carefully considered. Apart from the town centre, the urban expansion area should be the preferred location for new convenience shopping provision in Thetford. Out-of-centre retail proposals that could jeopardise the potential to provide convenience shopping provision within the urban extension and/or undermine the vitality and viability of the town centre should be resisted.

15.15 In Attleborough there is scope for an additional medium/large food store before 2016, i.e. of at least 1,000 sq m net (1,400 sq m gross) convenience sales, or an extension to the existing Sainsbury store. However it may not be possible to accommodate this floorspace within or on the edge of the town centre.

15.16 Capacity in Attleborough is expected to increase from 1,000 sq m net in 2016 to 1,500 sq m net in 2026. If it is not possible to accommodate short to medium capacity within the town centre then all the emerging capacity (1,500 sq m net) could be provided within shopping centres within the Attleborough Urban Extension to serve new residential areas, in the form of local/neighbourhood centres. Again it is possible a district centre with a larger food store (up to 2,000 sq m net) could be provided, subject to the acceptable impact on the town centre. Apart from the town centre, the urban expansion area should be the preferred location for new convenience shopping provision in Attleborough. Out-of-centre retail proposals that could jeopardise the potential to provide convenience shopping provision within the urban extension and/or undermine the vitality and viability of the town centre should be resisted.

Comparison Goods Development

15.17 The strategy should seek to concentrate further comparison retail development within the five main town centres, and in particular Thetford and Dereham as the main comparison shopping destinations in the District. The strategy should seek to maintain the five town centre's position in the shopping hierarchy and maintain the centre's existing market share of expenditure. In order to maintain their existing position it will be necessary to continue to improve comparison shopping facilities in the longer term. Comparison retail development should be consistent in terms of scale and nature of each centre. Development that would serve a significant part of the District should be located in Thetford or Dereham, generally retail development of 2,000 sq m gross or more.

15.18 The quantitative capacity analysis indicates that in the short to medium term up to 2016 there could be scope for about 3,100 sq m net (4,200 sq m gross) of comparison floorspace in the District as a whole, and this could increase to 11,600 sq m net (15,500 sq m gross) by 2021 (over and above commitments as at August 2010).

15.19 The Council should seek to identify sites within the designated centres to meet the floorspace projections up to 2016, and then longer term opportunities to meet projections up to 2021. Sites identified in the LDF should continue to be explored with the landowner/developers, recognising it may take a number of years to complete complex developments.

15.20 Any major comparison retail proposals outside the designated centres will be required to demonstrate compliance with the sequential approach to site selection and that the proposal will not have an unacceptable impact on existing centres. Development within centres will also need to be consistent in terms of scale and nature to the role of that centre and the catchment area the centre serves.

15.21 Within Swaffham and Watton, the projections suggest there will be limited need for further comparison floorspace up to 2016.

15.22 In Dereham there is scope for about 1,700 sq m net (2,300 sq m gross) by 2016 increasing to 4,900 sq m net (6,600 sq m gross) by 2021. The Georges Road/TA Centre area in the town centre should be allocated and brought forward to meet this emerging capacity.

15.23 In Thetford existing commitments and proposals are capable of accommodating expenditure growth up to 2016. By 2021 there could be scope for about 3,800 sq m net (5,000 sq m gross) over and above commitments, increasing to 8,400 sq m net (11,100 sq m gross) by 2026. Local shopping facilities within the Thetford Urban Extension could accommodate at least 1,100 sq m net (1,500 sq m gross) of this longer term growth. Development opportunities within the town centre should be explored to meet emerging capacity, i.e. Riverside Walk, Minstergate, Bridge Street car park, Tanner Street car park, Carnegie Community Hall and Thetford Retail Park. If these opportunities are not capable of accommodating longer term growth (after 2016) then comparison retail development in centres within the urban extension could exceed 1,500 sq m gross.

15.24 Out-of-centre retail proposals that could jeopardise the potential to provide comparison shopping provision within the urban extension and/or undermine the vitality and viability of the town centre should be resisted.

15.25 In Attleborough there some limited scope for further comparison floorspace up to 2016 (600 sq m net – 800 sq m gross). By 2021 there could be scope for about 1,300 sq m net (1,700 sq m gross), increasing to 2,300 sq m net (3,000 sq m gross) by 2026. Local shopping facilities within the Attleborough Urban Extension could accommodate at least 700 sq m net (900 sq m gross) of this longer term growth. However, it seems unlikely that opportunities within the town centre will be capable of accommodating this emerging capacity, therefore comparison retail development in centres within the urban extension could exceed 900 sq m gross, subject to acceptable impact on the town centre.

15.26 Out-of-centre retail proposals that could jeopardise the potential to provide comparison shopping provision within the Attleborough urban extension and/or undermine the vitality and viability of the town centre should be resisted.

Commercial Leisure and Other Town Centres Uses

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

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

Scale of Development

15.29 Large-scale development which serves a significant part of the District should be concentrated within Thetford or Dereham town centres.

15.30 These two centres are the largest centres and should continue to act as the principal centres within the District. Attleborough, Swaffham and Watton should complement Thetford and Dereham by providing for main and bulk convenience food shopping and a reasonable range of comparison shopping facilities and other services. Other shopping facilities outside the five main centres should cater for top-up and basket convenience shopping and services, but are likely to provide a much more limited range of comparison shopping.

15.31 The sequential approach indicates that town, district and local centres are the preferred location for new retail/leisure/cultural development. Some forms of development may be more appropriate in smaller centres, if there are localised areas of deficiency. The key issues are the nature and scale of retail/leisure development proposed and the catchment area the development seeks to serve.

15.32 In general development within the village and local centres should primarily serve the village/settlement within which it is located, and perhaps smaller nearby settlements which do not have a centre. Local centres within the main towns, i.e. in the urban area but outside the town centre serving that town, should primarily serve walk-in catchment areas.

Local Development Framework Policies

15.33 The Core Strategy sets out floorspace projections for the District, based on the 2007 Retail Study Update. These projections should be updated in the light of the results from the 2010 study. The next stages of the LDF should update and roll forward the retail floorspace projections, as follows:

Up to 2016

- Comparison goods 3,100 sq m net (4,200 sq m gross);
- Convenience goods 3,100 sq m net (4,400 sq m gross);

2016-2021

- Comparison goods 8,500 sq m net (11,100 sq m gross);
- Convenience goods 900 sq m net (1,400 sq m gross);

2021-2026

- Comparison goods 10,100 sq m net (13,400 sq m gross);
- Convenience goods 1,100 sq m net (1,600 sq m gross).

15.34 These floorspace figures do not take into account current proposals without planning permission or the reoccupation of vacant shop units. The implementation of proposals would reduce these floorspace projections.

Future Strategy Implementation and Monitoring

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

- application of guidance within PPS4, particularly relating to the sequential approach and impact tests in determining out-of-centre retail and other development proposals that generate significant numbers of trips;
- improving the range and choice of shops and services in all centres (where appropriate in terms of scale) by encouraging intensification, development and the re-occupation of vacant premises, and continuing to promote the centres.
- maintaining the generally high quality environment within each centre;
- bring forward development opportunities through the LDF process to improve the availability of modern premises suitable for new occupiers.
- pro-active approach to site assembly which may require the use of compulsory purchase powers.

15.36 The recommendations and projections within this study are expected to assist the Council in reviewing development plan policies over the coming years and to assist development control decisions during this period. The study provides a broad overview of the potential need for further retail and leisure development up to 2016, with longer term forecast up to 2021 and 2026. However, projections are subject to uncertainty and forecasts may need to be amended to reflect emerging changes as and when new information becomes available. In particular long-term projections up to 2026 should be treated with caution.

15.37 Therefore, we would recommend that this retail/leisure capacity study should be updated in 4-5 years time and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

- population projections;
- local expenditure estimates (information from Experian or other recognised data providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping;
- existing retail floorspace and average turnover to floorspace densities (floorspace surveys and turnover data from Management Horizons, Retail Ranking); and
- implemented development within and around the study area.

15.38 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. We do not envisage that the structure of the capacity assessment set out in this report will need to be amended.

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Planning Design Economics

Breckland Retail and Town Centre Study Appendices

Breckland Council

August 2010

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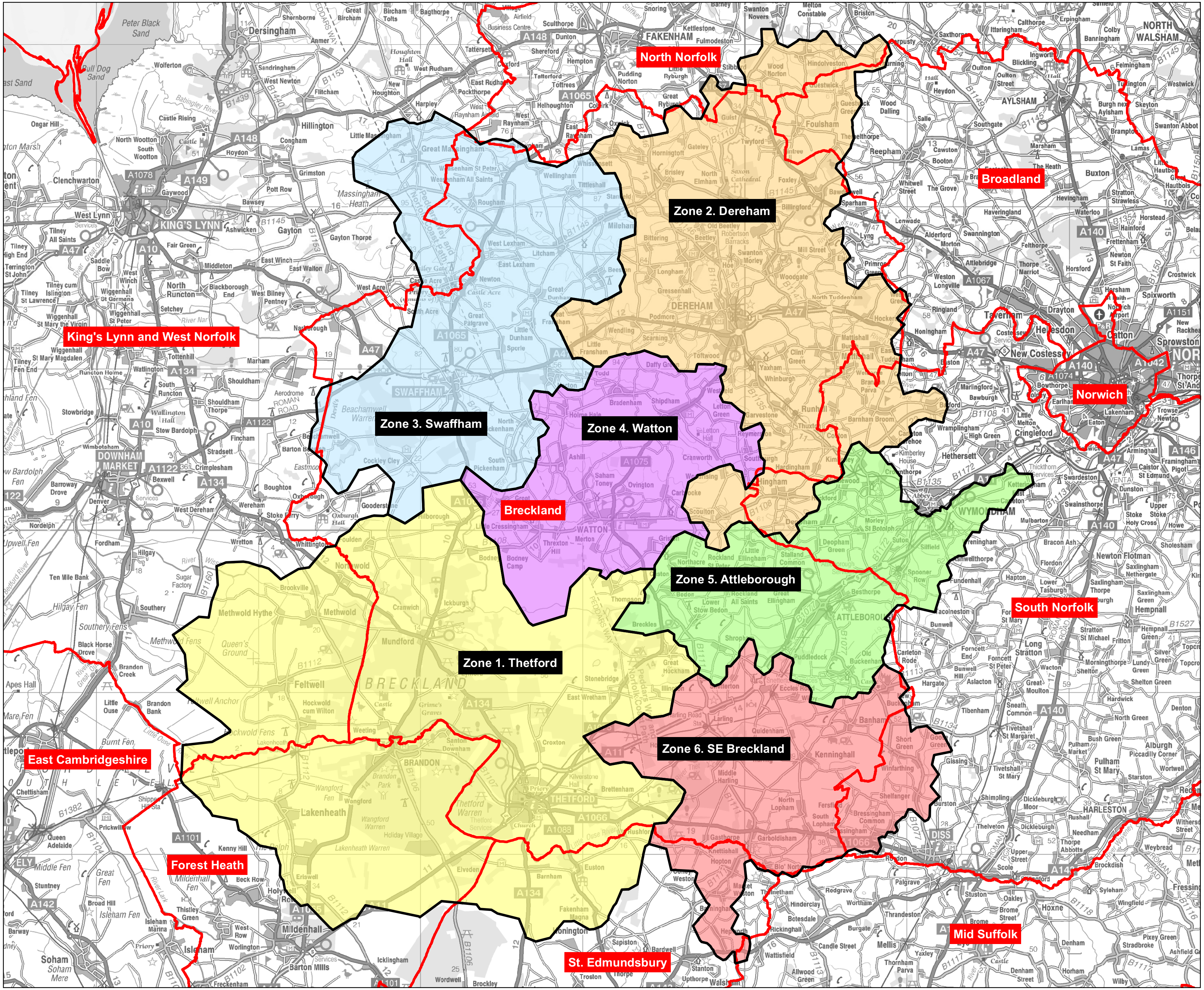
Contents



Key

- Local Authority Boundary
- Zone 1. Thetford
- Zone 2. Dereham
- Zone 3. Swaffham
- Zone 4. Watton
- Zone 5. Attleborough
- Zone 6. SE Breckland

Nathaniel Lichfield and Partners

Project	Breckland Retail Study
Title	Catchment Plan
Client	Breckland District Council
Date	06.07.2010
Scale	1 : 300,000 @ A4
Drawn by	MAr
Drg. No	GIS12299-001

N

GIS Reference: S:\CL12299 - Breckland Retail Study\CL12299 - Breckland Retail Study - Catchment - 06.07.2010.mxd

Breckland Survey Zones

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

Table 1A - Convenience Floorspace and Expected Turnover (2008 prices)

Town/Store	Net Sales Floorspace Sq M	% Conv. Sales Floorspace	Conv. Sales Floorspace Sq M Net	Turnover Sales Sales Density £ per Sq M	£M Total Conv. Turnover
Thetford					
Aldi, Thetford	700	85%	595	£4,368	£2.60
Iceland, Thetford	435	95%	413	£6,000	£2.48
Sainsbury, Thetford (with extension)	3,778	60%	2,267	£10,217	£23.16
Farm Foods, Thetford	300	100%	300	£4,000	£1.20
Tesco Express, Thetford	146	100%	146	£12,611	£1.84
Tesco, Kilverstone Lane, Thetford	4,260	75%	3,195	£12,611	£40.29
Other town centre	560	100%	560	£4,000	£2.24
Total	**9,619**		**6,916**		**£73.81**
Dereham					
Somerfield, East Dereham	555	95%	527	£7,751	£4.09
Iceland, East Dereham	555	95%	527	£6,000	£3.16
Morrisons, East Dereham	2,668	85%	2,268	£12,010	£27.24
Roys of Wroxham (conv. only)	250	100%	250	£4,500	£1.13
Tesco, Dereham	4,812	60%	2,887	£12,611	£36.41
Lidl, Dereham	705	80%	564	£2,929	£1.65
Other town centre	380	100%	380	£4,000	£1.52
Total	**9,545**		**7,024**		**£75.19**
Swaffham					
Co-op (Rainbow), Swaffham	479	95%	455	£6,753	£3.07
Netto, Swaffham	887	95%	843	£5,295	£4.46
Iceland, Swaffham	484	95%	460	£6,000	£2.76
Other town centre	600	100%	600	£3,500	£2.10
Waitrose (was Safeway)	2,243	85%	1,907	£11,589	£22.10
Total	**4,693**		**4,264**		**£34.49**
Watton					
Somerfield, Watton	572	95%	543	£7,751	£4.21
Tesco, Watton	1,058	90%	952	£12,611	£12.01
Other town centre	380	100%	380	£3,500	£1.33
Total	**2,010**		**1,876**		**£17.55**
Attleborough					
Lidl, Attleborough	929	80%	743	£2,929	£2.18
Sainsbury, Attleborough	1,394	95%	1,324	£10,217	£13.53
Other town centre	600	100%	600	£3,500	£2.10
Total	**2,923**		**2,668**		**£17.81**
GRAND TOTAL	**28,790**		**22,747**	**£9,621**	**£218.85**
	Comparison Sales Floorspace in Food Stores Sq M Net				**6,043**

Sources: IGD Food Store Directory 2009
NLP Site Survey 2010
Retail Rankings 2010
Planning application details

Table 2A - Comparison Floorspace in Breckland District

Town	Net Sales Floorspace Sq M
Thetford	
Town Centre Comparison shops	6,400
Retail Warehouses	9,600
Aldi, Thetford	105
Iceland, Thetford	22
Sainsbury, Thetford	1,511
Tesco, Kilverstone, Thetford	1,065
Total Town Centre	**18,703**
Dereham	
Town centre comparison shops	8,800
Retail Warehouses	8,600
Somerfield, East Dereham	28
Iceland, East Dereham	28
Morrisons, East Dereham	400
Tesco, Dereham	1,925
Lidl, Dereham	141
Total	**19,922**
Swaffham Town Centre	
Town centre comparison shops	1,900
Co-op (Rainbow), Swaffham	24
Iceland, Swaffham	24
Netto, Swaffham	44
Waitrose, Swaffham	336
Total	**2,328**
Watton Town Centre	
Town centre comparison shops	1,900
Somerfield, Watton	29
Tesco, Watton	53
Total	**1,982**
Attleborough Town Centre	
Town centre comparison shops	2,000
Lidl, Attleborough	186
Sainsbury, Attleborough	70
Total	**2,256**
Grand Total	**45,191**

Sources: Breckland District Council
NLP Site Survey
Table 1A

Table 3A - Convenience Commitments and Expected Turnover (2008 prices)

Type of Floorspace/Operator	Net Sales Floorspace Sq M	Turnover Sales Density Per Sq M	Total Turnover £M
Tesco extension, Thetford (3PL/2009/0973/F)	930	£12,611	£11.73
Tesco extension, Watton (3PL/2008/1204/F)	900	£12,611	£11.35
Convenience store, Moorgate Road, Dereham (3PL/2010/0067/CU)	169	£5,000	£0.85
Lidl Extension, Dereham (3PL/2010/0206/F)	272	£2,929	£0.80

Source: Breckland District Council

Table 4A - Comparison Commitments and Expected Turnover (2008 prices)

Type of Floorspace/Operator	Gross Floorspace Sq M	Net Sales Floorspace Sq M	Turnover Sales Density Per Sq M	Total Turnover £M
Thetford				
Forest Retail Park (3PL/2006/0851/O)	3,252	2,602	£2,500	£6.50
Wickes (3PL/2010/0461/F)	2,462	2,200	£2,416	£5.32
Tesco extension (3PL/2009/0973/F)	n/a	650	£10,039	£6.53
Thetford Retail Park (3PL/2006/0955/D)	469	375	£2,500	£0.94
Thetford Total	**6,183**	**5,827**		**£19.28**
Dereham				
Wrights Walk Phase 2 (3PL/2007/1446/F)	1,765	1,235	£5,000	£6.18
Lidl extension, Dereham (3PL/2010/0206/F)	n/a	68	£4,000	£0.27
Dereham Total	**1,765**	**1,303**		**£6.45**

Source: Breckland District Council

Appendix 2 Convenience Retail Assessment

Table 1B : Population Projections

Zone	Postcode Sector	2001	2010	2013	2016	2021	2026	Change 2010-2016	Change 2010-2021	Change 2010-2026
1. Thetford	**IP24 1**	8,933	9,624	10,109	10,593	11,813	12,779	10.1%	22.7%	32.8%
	IP24 2	8,382	9,031	9,514	9,996	11,216	12,182	10.7%	24.2%	34.9%
	IP24 3	7,688	8,277	8,486	8,694	9,058	9,438	5.0%	9.4%	14.0%
	IP26 4	5,314	5,751	5,850	5,949	6,102	6,247	3.4%	6.1%	8.6%
	IP26 5	3,586	3,864	3,874	3,884	3,884	3,884	0.5%	0.5%	0.5%
	IP27 0	10,297	11,086	11,365	11,645	12,132	12,640	5.0%	9.4%	14.0%
	IP27 9	8,930	9,614	9,857	10,099	10,522	10,962	5.0%	9.4%	14.0%
Zone 1 Total		**53,130**	**57,247**	**59,054**	**60,860**	**64,727**	**68,132**	**6.3%**	**13.1%**	**19.0%**
2. Dereham	**NR19 1**	9,492	10,227	10,279	10,331	10,411	10,411	1.0%	1.8%	1.8%
	NR19 2	8,703	9,377	9,427	9,477	9,557	9,557	1.1%	1.9%	1.9%
	NR20 3	6,228	6,710	6,753	6,796	6,876	6,876	1.3%	2.5%	2.5%
	NR20 4	7,153	7,707	7,752	7,798	7,878	7,878	1.2%	2.2%	2.2%
	NR20 5	4,785	5,155	5,169	5,182	5,182	5,182	0.5%	0.5%	0.5%
	NR9 4	4,538	4,889	4,902	4,915	4,915	4,915	0.5%	0.5%	0.5%
Zone 2 Total		**40,899**	**44,065**	**44,282**	**44,500**	**44,820**	**44,820**	**1.0%**	**1.7%**	**1.7%**
3. Swaffham	**PE32 2**	6,328	6,818	6,836	6,854	6,854	6,854	0.5%	0.5%	0.5%
	PE37 7	6,300	6,788	6,975	7,163	7,283	7,283	5.5%	7.3%	7.3%
	PE37 8	3,546	3,820	3,831	3,841	3,841	3,841	0.5%	0.5%	0.5%
Zone 3 Total		**16,174**	**17,426**	**17,642**	**17,857**	**17,977**	**17,977**	**2.5%**	**3.2%**	**3.2%**
4. Watton	**IP25 6**	10,015	10,790	10,887	10,983	11,003	11,003	1.8%	2.0%	2.0%
	IP25 7	6,677	7,194	7,281	7,368	7,388	7,388	2.4%	2.7%	2.7%
Zone 4 Total		**16,692**	**17,984**	**18,167**	**18,350**	**18,390**	**18,390**	**2.0%**	**2.3%**	**2.3%**
5. Attleborough	**NR17 1**	6,985	7,526	7,658	7,790	8,114	8,794	3.5%	7.8%	16.9%
	NR17 2	7,679	8,273	8,557	8,840	9,596	11,184	6.9%	16.0%	35.2%
	NR18 9	4,665	5,130	5,287	5,444	5,810	6,084	6.1%	13.3%	18.6%
Zone 5 Total		**19,329**	**20,929**	**21,502**	**22,074**	**23,520**	**26,062**	**5.5%**	**12.4%**	**24.5%**
6. SE Breckland	**NR16 2**	6,305	6,793	6,811	6,829	6,829	6,829	0.5%	0.5%	0.5%
	IP22 2	4,946	5,329	5,343	5,357	5,357	5,357	0.5%	0.5%	0.5%
Zone 6 Total		**11,251**	**12,122**	**12,154**	**12,185**	**12,185**	**12,185**	**0.5%**	**0.5%**	**0.5%**
	TOTAL	**157,475**	**169,773**	**172,801**	**175,828**	**181,621**	**187,567**	**3.6%**	**7.0%**	**10.5%**

Sources: *Experian 2001 Population Census 2001*
Norfolk County Council Population Projections (includes housing growth)
Suffolk County Council Population Projections

Table 2B: Convenience Goods Expenditure Per Capita (2008 Prices)

Expenditure per capita		2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1. Thetford	**IP24 1**	£1,747	£1,775	£1,791	£1,836	£1,883	2.5%	5.1%	7.8%
	IP24 2	£1,746	£1,774	£1,790	£1,835	£1,881	2.5%	5.1%	7.7%
	IP24 3	£1,710	£1,738	£1,753	£1,797	£1,843	2.5%	5.1%	7.8%
	IP26 4	£1,717	£1,745	£1,760	£1,805	£1,850	2.5%	5.1%	7.7%
	IP26 5	£1,820	£1,849	£1,866	£1,913	£1,961	2.5%	5.1%	7.7%
	IP27 0	£1,759	£1,787	£1,803	£1,848	£1,895	2.5%	5.1%	7.7%
	IP27 9	£1,507	£1,531	£1,545	£1,584	£1,624	2.5%	5.1%	7.8%
2. Dereham	**NR19 1**	£1,812	£1,841	£1,858	£1,905	£1,953	2.5%	5.1%	7.8%
	NR19 2	£1,768	£1,796	£1,813	£1,859	£1,906	2.5%	5.1%	7.8%
	NR20 3	£1,862	£1,892	£1,908	£1,957	£2,006	2.5%	5.1%	7.7%
	NR20 4	£1,789	£1,818	£1,834	£1,880	£1,928	2.5%	5.1%	7.8%
	NR20 5	£1,986	£2,018	£2,036	£2,087	£2,140	2.5%	5.1%	7.8%
	NR9 4	£1,904	£1,935	£1,952	£2,002	£2,052	2.5%	5.1%	7.8%
3. Swaffham	**PE32 2**	£1,969	£2,001	£2,018	£2,069	£2,121	2.5%	5.1%	7.7%
	PE37 7	£1,746	£1,774	£1,790	£1,835	£1,881	2.5%	5.1%	7.7%
	PE37 8	£1,851	£1,881	£1,897	£1,945	£1,994	2.5%	5.1%	7.7%
4. Watton	**IP25 6**	£1,611	£1,637	£1,652	£1,693	£1,736	2.5%	5.1%	7.8%
	IP25 7	£1,889	£1,919	£1,936	£1,985	£2,035	2.5%	5.1%	7.7%
5. Attleborough	**NR17 1**	£1,887	£1,917	£1,934	£1,983	£2,033	2.5%	5.1%	7.7%
	NR17 2	£1,766	£1,794	£1,810	£1,856	£1,902	2.5%	5.1%	7.7%
	NR18 9	£1,737	£1,765	£1,781	£1,826	£1,872	2.5%	5.1%	7.8%
6. SE Breckland	**NR16 2**	£1,803	£1,832	£1,849	£1,895	£1,943	2.6%	5.1%	7.8%
	IP22 2	£2,015	£2,047	£2,066	£2,118	£2,171	2.5%	5.1%	7.7%

Experian local estimates for 2008 convenience goods expenditure per capita
(Excluding special forms of trading - 2.2% in 2010, 2.6% in 2014, 2.8% in 2018 and beyond)
Experian Business Strategies - recommended forecast growth rates
(-0.5% 2008-2009, -0.2% 2009-2010, 0.6% 2010-2011 and 0.5% per annum between 2011 and 2026)

Table 3B: Total Available Convenience Goods Expenditure (£m 2008 Prices)

Available Expenditure		2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1. Thetford	**IP24 1**	£16.81	£17.94	£18.97	£21.69	£24.06	12.8%	29.0%	43.1%
	IP24 2	£15.77	£16.88	£17.89	£20.58	£22.91	13.5%	30.5%	45.3%
	IP24 3	£14.15	£14.74	£15.24	£16.28	£17.39	7.7%	15.0%	22.9%
	IP26 4	£9.88	£10.21	£10.47	£11.01	£11.56	6.0%	11.5%	17.0%
	IP26 5	£7.03	£7.16	£7.25	£7.43	£7.62	3.1%	5.7%	8.3%
	IP27 0	£19.50	£20.31	£21.00	£22.42	£23.95	7.7%	15.0%	22.8%
	IP27 9	£14.49	£15.09	£15.60	£16.67	£17.80	7.7%	15.0%	22.9%
Zone 1 Total		**£97.63**	**£102.34**	**£106.42**	**£116.08**	**£125.30**	**9.0%**	**18.9%**	**28.3%**
2. Dereham	**NR19 1**	£18.53	£18.93	£19.20	£19.83	£20.33	3.6%	7.0%	9.7%
	NR19 2	£16.58	£16.93	£17.18	£17.77	£18.22	3.6%	7.2%	9.9%
	NR20 3	£12.49	£12.78	£12.97	£13.46	£13.79	3.8%	7.7%	10.4%
	NR20 4	£13.79	£14.09	£14.30	£14.81	£15.19	3.7%	7.4%	10.2%
	NR20 5	£10.24	£10.43	£10.55	£10.82	£11.09	3.1%	5.6%	8.3%
	NR9 4	£9.31	£9.48	£9.59	£9.84	£10.09	3.1%	5.7%	8.3%
Zone 2 Total		**£80.94**	**£82.64**	**£83.79**	**£86.52**	**£88.71**	**3.5%**	**6.9%**	**9.6%**
3. Swaffham	**PE32 2**	£13.42	£13.68	£13.83	£14.18	£14.54	3.0%	5.6%	8.3%
	PE37 7	£11.85	£12.38	£12.82	£13.36	£13.70	8.2%	12.8%	15.6%
	PE37 8	£7.07	£7.20	£7.29	£7.47	£7.66	3.0%	5.6%	8.3%
Zone 3 Total		**£32.35**	**£33.26**	**£33.94**	**£35.01**	**£35.89**	**4.9%**	**8.2%**	**11.0%**
4. Watton	**IP25 6**	£17.38	£17.82	£18.14	£18.63	£19.10	4.4%	7.2%	9.9%
	IP25 7	£13.59	£13.97	£14.26	£14.66	£15.03	5.0%	7.9%	10.6%
Zone 4 Total		**£30.97**	**£31.79**	**£32.41**	**£33.29**	**£34.13**	**4.6%**	**7.5%**	**10.2%**
5. Attleborough	**NR17 1**	£14.20	£14.68	£15.07	£16.09	£17.88	6.1%	13.3%	25.9%
	NR17 2	£14.61	£15.35	£16.00	£17.81	£21.27	9.5%	21.9%	45.6%
	NR18 9	£8.91	£9.33	£9.70	£10.61	£11.39	8.8%	19.1%	27.8%
Zone 5 Total		**£37.72**	**£39.37**	**£40.76**	**£44.51**	**£50.54**	**8.1%**	**18.0%**	**34.0%**
6. SE Breckland	**NR16 2**	£12.25	£12.48	£12.63	£12.94	£13.27	3.1%	5.7%	8.3%
	IP22 2	£10.74	£10.94	£11.07	£11.35	£11.63	3.1%	5.7%	8.3%
Zone 6 Total		**£22.99**	**£23.42**	**£23.69**	**£24.29**	**£24.90**	**3.1%**	**5.7%**	**8.3%**
TOTAL		**£302.60**	**£312.82**	**£321.02**	**£339.70**	**£359.47**	**6.1%**	**12.3%**	**18.8%**

Sources: *Table 1B and Table 2B*

Table 4B: Convenience Shopping Penetration Rates 2010

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow
Sainsbury, Thetford	24%	0%	1%	3%	1%	8%	10%
Tesco, Kilverstone, Thetford	27%	0%	0%	2%	7%	15%	10%
Other Thetford	14%	0%	0%	0%	1%	3%	10%
Thetford Sub-Total	**65%**	**0%**	**1%**	**5%**	**9%**	**26%**	**n/a**
Morrisons, East Dereham	0%	35%	14%	14%	3%	0%	5%
Tesco, Dereham	0%	28%	15%	18%	2%	0%	5%
Other Dereham	0%	15%	2%	3%	0%	0%	5%
Dereham Sub-Total	**0%**	**78%**	**31%**	**35%**	**5%**	**0%**	**n/a**
Waitrose, Swaffham	1%	1%	19%	4%	0%	0%	20%
Other Swaffham	1%	1%	29%	1%	0%	0%	10%
Swaffham Sub-Total	**2%**	**2%**	**48%**	**5%**	**0%**	**0%**	**n/a**
Tesco, Watton	1%	1%	1%	32%	2%	1%	2%
Other Watton	0%	0%	0%	16%	0%	0%	2%
Watton Sub-Total	**1%**	**1%**	**1%**	**48%**	**2%**	**1%**	**n/a**
Sainsbury, Attleborough	0%	0%	0%	1%	43%	12%	5%
Other Attleborough	0%	0%	0%	0%	13%	3%	5%
Attleborough Sub-Total	**0%**	**0%**	**0%**	**1%**	**56%**	**15%**	**n/a**
Local Shops in Breckland	**0%**	**3%**	**1%**	**0%**	**1%**	**8%**	**5%**
Expenditure Outflow	**32%**	**16%**	**18%**	**6%**	**27%**	**50%**	**n/a**
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***

Source: Market shares based on NEMS household survey 2010 and NLP

Table 5B: Convenience Expenditure 2010 £Million

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expend
Expenditure 2010	**£97.63**	**£80.94**	**£32.35**	**£30.97**	**£37.72**	**£22.99**	**n/a**	
Sainsbury, Thetford	£23.43	£0.00	£0.32	£0.93	£0.38	£1.84	£2.99	£29.89
Tesco, Kilverstone, Thetford	£26.36	£0.00	£0.00	£0.62	£2.64	£3.45	£3.67	£36.74
Other Thetford	£13.67	£0.00	£0.00	£0.00	£0.38	£0.69	£1.64	£16.37
Thetford Sub-Total	**£63.46**	**£0.00**	**£0.32**	**£1.55**	**£3.40**	**£5.98**	**£8.30**	**£83.00**
Morrisons, East Dereham	£0.00	£28.33	£4.53	£4.34	£1.13	£0.00	£2.02	£40.34
Tesco, Dereham	£0.00	£22.66	£4.85	£5.58	£0.75	£0.00	£1.78	£35.63
Other Dereham	£0.00	£12.14	£0.65	£0.93	£0.00	£0.00	£0.72	£14.44
Dereham Sub-Total	**£0.00**	**£63.13**	**£10.03**	**£10.84**	**£1.89**	**£0.00**	**£4.52**	**£90.41**
Waitrose, Swaffham	£0.98	£0.81	£6.15	£1.24	£0.00	£0.00	£2.29	£11.46
Other Swaffham	£0.98	£0.81	£9.38	£0.31	£0.00	£0.00	£1.28	£12.75
Swaffham Sub-Total	**£1.95**	**£1.62**	**£15.53**	**£1.55**	**£0.00**	**£0.00**	**£3.57**	**£24.21**
Tesco, Watton	£0.98	£0.81	£0.32	£9.91	£0.75	£0.23	£0.27	£13.27
Other Watton	£0.00	£0.00	£0.00	£4.96	£0.00	£0.00	£0.10	£5.06
Watton Sub-Total	**£0.98**	**£0.81**	**£0.32**	**£14.87**	**£0.75**	**£0.23**	**£0.37**	**£18.33**
Sainsbury, Attleborough	£0.00	£0.00	£0.00	£0.31	£16.22	£2.76	£1.02	£20.30
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£4.90	£0.69	£0.29	£5.89
Attleborough Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.31**	**£21.12**	**£3.45**	**£1.31**	**£26.19**
Local Shops in Breckland	**£0.00**	**£2.43**	**£0.32**	**£0.00**	**£0.38**	**£1.84**	**£0.26**	**£5.23**
Breckland District Total	**£66.39**	**£67.99**	**£26.52**	**£29.11**	**£27.54**	**£11.49**	**£18.33**	**£247.37**
Expenditure Outflow	£31.24	£12.95	£5.82	£1.86	£10.19	£11.49	**n/a**	**£73.55**
Grand Total	**£97.63**	**£80.94**	**£32.35**	**£30.97**	**£37.72**	**£22.99**	***n/a***	***£320.92***

Sources: Table 3B and 4B

Table 6B: Convenience Expenditure 2013 £Million

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expend
Expenditure 2013	**£102.34**	**£82.64**	**£33.26**	**£31.79**	**£39.37**	**£23.42**	**n/a**	
Sainsbury, Thetford	£24.56	£0.00	£0.33	£0.95	£0.39	£1.87	£3.12	£31.24
Tesco, Kilverstone, Thetford	£27.63	£0.00	£0.00	£0.64	£2.76	£3.51	£3.84	£38.37
Other Thetford	£14.33	£0.00	£0.00	£0.00	£0.39	£0.70	£1.71	£17.14
Thetford Sub-Total	**£66.52**	**£0.00**	**£0.33**	**£1.59**	**£3.54**	**£6.09**	**£8.68**	**£86.75**
Morrisons, East Dereham	£0.00	£28.93	£4.66	£4.45	£1.18	£0.00	£2.06	£41.28
Tesco, Dereham	£0.00	£23.14	£4.99	£5.72	£0.79	£0.00	£1.82	£36.46
Other Dereham	£0.00	£12.40	£0.67	£0.95	£0.00	£0.00	£0.74	£14.75
Dereham Sub-Total	**£0.00**	**£64.46**	**£10.31**	**£11.13**	**£1.97**	**£0.00**	**£4.62**	**£92.49**
Waitrose, Swaffham	£1.02	£0.83	£6.32	£1.27	£0.00	£0.00	£2.36	£11.80
Other Swaffham	£1.02	£0.83	£9.64	£0.32	£0.00	£0.00	£1.31	£13.12
Swaffham Sub-Total	**£2.05**	**£1.65**	**£15.96**	**£1.59**	**£0.00**	**£0.00**	**£3.67**	**£24.92**
Tesco, Watton	£1.02	£0.83	£0.33	£10.17	£0.79	£0.23	£0.27	£13.65
Other Watton	£0.00	£0.00	£0.00	£5.09	£0.00	£0.00	£0.10	£5.19
Watton Sub-Total	**£1.02**	**£0.83**	**£0.33**	**£15.26**	**£0.79**	**£0.23**	**£0.38**	**£18.84**
Sainsbury, Attleborough	£0.00	£0.00	£0.00	£0.32	£16.93	£2.81	£1.06	£21.11
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£5.12	£0.70	£0.31	£6.13
Attleborough Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.32**	**£22.05**	**£3.51**	**£1.36**	**£27.24**
Local Shops in Breckland	**£0.00**	**£2.48**	**£0.33**	**£0.00**	**£0.39**	**£1.87**	**£0.27**	**£5.35**
Breckland District Total	**£69.59**	**£69.42**	**£27.27**	**£29.89**	**£28.74**	**£11.71**	**£18.98**	**£255.59**
Expenditure Outflow	£32.75	£13.22	£5.99	£1.91	£10.63	£11.71	**n/a**	**£76.20**
Grand Total	**£102.34**	**£82.64**	**£33.26**	**£31.79**	**£39.37**	**£23.42**	***n/a***	***£331.80***

Sources: Table 3B and 4B

Table 7B: Convenience Expenditure 2016 £Million

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expend
Expenditure 2016	**£106.42**	**£83.79**	**£33.94**	**£32.41**	**£40.76**	**£23.69**	**n/a**	
Sainsbury, Thetford	£25.54	£0.00	£0.34	£0.97	£0.41	£1.90	£3.24	£32.40
Tesco, Kilverstone, Thetford	£28.73	£0.00	£0.00	£0.65	£2.85	£3.55	£3.98	£39.77
Other Thetford	£14.90	£0.00	£0.00	£0.00	£0.41	£0.71	£1.78	£17.80
Thetford Sub-Total	**£69.17**	**£0.00**	**£0.34**	**£1.62**	**£3.67**	**£6.16**	**£9.00**	**£89.96**
Morrisons, East Dereham	£0.00	£29.33	£4.75	£4.54	£1.22	£0.00	£2.10	£41.94
Tesco, Dereham	£0.00	£23.46	£5.09	£5.83	£0.82	£0.00	£1.85	£37.05
Other Dereham	£0.00	£12.57	£0.68	£0.97	£0.00	£0.00	£0.75	£14.97
Dereham Sub-Total	**£0.00**	**£65.36**	**£10.52**	**£11.34**	**£2.04**	**£0.00**	**£4.70**	**£93.96**
Waitrose, Swaffham	£1.06	£0.84	£6.45	£1.30	£0.00	£0.00	£2.41	£12.06
Other Swaffham	£1.06	£0.84	£9.84	£0.32	£0.00	£0.00	£1.34	£13.41
Swaffham Sub-Total	**£2.13**	**£1.68**	**£16.29**	**£1.62**	**£0.00**	**£0.00**	**£3.75**	**£25.47**
Tesco, Watton	£1.06	£0.84	£0.34	£10.37	£0.82	£0.24	£0.28	£13.94
Other Watton	£0.00	£0.00	£0.00	£5.19	£0.00	£0.00	£0.11	£5.29
Watton Sub-Total	**£1.06**	**£0.84**	**£0.34**	**£15.56**	**£0.82**	**£0.24**	**£0.38**	**£19.23**
Sainsbury, Attleborough	£0.00	£0.00	£0.00	£0.32	£17.53	£2.84	£1.09	£21.78
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£5.30	£0.71	£0.32	£6.33
Attleborough Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.32**	**£22.83**	**£3.55**	**£1.41**	**£28.11**
Local Shops in Breckland	**£0.00**	**£2.51**	**£0.34**	**£0.00**	**£0.41**	**£1.90**	**£0.27**	**£5.43**
Breckland District Total	**£72.37**	**£70.39**	**£27.83**	**£30.46**	**£29.76**	**£11.85**	**£19.51**	**£262.16**
Expenditure Outflow	£34.06	£13.41	£6.11	£1.94	£11.01	£11.85	**n/a**	**£78.37**
Grand Total	**£106.42**	**£83.79**	**£33.94**	**£32.41**	**£40.76**	**£23.69**	***n/a***	***£340.52***

Sources: Table 3B and 4B

Table 8B: Convenience Expenditure 2021 £Million

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expend
Expenditure 2021	**£116.08**	**£86.52**	**£35.01**	**£33.29**	**£44.51**	**£24.29**	**n/a**	
Sainsbury, Thetford	£27.86	£0.00	£0.35	£1.00	£0.45	£1.94	£3.51	£35.11
Tesco, Kilverstone, Thetford	£31.34	£0.00	£0.00	£0.67	£3.12	£3.64	£4.31	£43.07
Other Thetford	£16.25	£0.00	£0.00	£0.00	£0.45	£0.73	£1.94	£19.36
Thetford Sub-Total	**£75.45**	**£0.00**	**£0.35**	**£1.66**	**£4.01**	**£6.31**	**£9.75**	**£97.54**
Morrisons, East Dereham	£0.00	£30.28	£4.90	£4.66	£1.34	£0.00	£2.17	£43.35
Tesco, Dereham	£0.00	£24.23	£5.25	£5.99	£0.89	£0.00	£1.91	£38.28
Other Dereham	£0.00	£12.98	£0.70	£1.00	£0.00	£0.00	£0.77	£15.45
Dereham Sub-Total	**£0.00**	**£67.49**	**£10.85**	**£11.65**	**£2.23**	**£0.00**	**£4.85**	**£97.07**
Waitrose, Swaffham	£1.16	£0.87	£6.65	£1.33	£0.00	£0.00	£2.50	£12.51
Other Swaffham	£1.16	£0.87	£10.15	£0.33	£0.00	£0.00	£1.39	£13.90
Swaffham Sub-Total	**£2.32**	**£1.73**	**£16.81**	**£1.66**	**£0.00**	**£0.00**	**£3.89**	**£26.42**
Tesco, Watton	£1.16	£0.87	£0.35	£10.65	£0.89	£0.24	£0.29	£14.45
Other Watton	£0.00	£0.00	£0.00	£5.33	£0.00	£0.00	£0.11	£5.44
Watton Sub-Total	**£1.16**	**£0.87**	**£0.35**	**£15.98**	**£0.89**	**£0.24**	**£0.40**	**£19.89**
Sainsbury, Attleborough	£0.00	£0.00	£0.00	£0.33	£19.14	£2.91	£1.18	£23.56
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£5.79	£0.73	£0.34	£6.86
Attleborough Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.33**	**£24.93**	**£3.64**	**£1.52**	**£30.42**
Local Shops in Breckland	**£0.00**	**£2.60**	**£0.35**	**£0.00**	**£0.45**	**£1.94**	**£0.28**	**£5.61**
Breckland District Total	**£78.93**	**£72.68**	**£28.71**	**£31.29**	**£32.49**	**£12.14**	**£20.70**	**£276.96**
Expenditure Outflow	£37.15	£13.84	£6.30	£2.00	£12.02	£12.14	**n/a**	**£83.45**
Grand Total	**£116.08**	**£86.52**	**£35.01**	**£33.29**	**£44.51**	**£24.29**	***n/a***	***£360.40***

Sources: Table 3B and 4B

Table 9B: Convenience Expenditure 2026 £Million

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expend
Expenditure 2026	**£125.30**	**£88.71**	**£35.89**	**£34.13**	**£50.54**	**£24.90**	**n/a**	
Sainsbury, Thetford	£30.07	£0.00	£0.36	£1.02	£0.51	£1.99	£3.77	£37.72
Tesco, Kilverstone, Thetford	£33.83	£0.00	£0.00	£0.68	£3.54	£3.73	£4.64	£46.43
Other Thetford	£17.54	£0.00	£0.00	£0.00	£0.51	£0.75	£2.09	£20.88
Thetford Sub-Total	**£81.44**	**£0.00**	**£0.36**	**£1.71**	**£4.55**	**£6.47**	**£10.50**	**£105.04**
Morrisons, East Dereham	£0.00	£31.05	£5.03	£4.78	£1.52	£0.00	£2.23	£44.60
Tesco, Dereham	£0.00	£24.84	£5.38	£6.14	£1.01	£0.00	£1.97	£39.34
Other Dereham	£0.00	£13.31	£0.72	£1.02	£0.00	£0.00	£0.79	£15.84
Dereham Sub-Total	**£0.00**	**£69.19**	**£11.13**	**£11.95**	**£2.53**	**£0.00**	**£4.99**	**£99.78**
Waitrose, Swaffham	£1.25	£0.89	£6.82	£1.37	£0.00	£0.00	£2.58	£12.91
Other Swaffham	£1.25	£0.89	£10.41	£0.34	£0.00	£0.00	£1.43	£14.32
Swaffham Sub-Total	**£2.51**	**£1.77**	**£17.23**	**£1.71**	**£0.00**	**£0.00**	**£4.01**	**£27.23**
Tesco, Watton	£1.25	£0.89	£0.36	£10.92	£1.01	£0.25	£0.30	£14.98
Other Watton	£0.00	£0.00	£0.00	£5.46	£0.00	£0.00	£0.11	£5.57
Watton Sub-Total	**£1.25**	**£0.89**	**£0.36**	**£16.38**	**£1.01**	**£0.25**	**£0.41**	**£20.55**
Sainsbury, Attleborough	£0.00	£0.00	£0.00	£0.34	£21.73	£2.99	£1.32	£26.38
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£6.57	£0.75	£0.39	£7.70
Attleborough Sub-Total	**£0.00**	**£0.00**	**£0.00**	**£0.34**	**£28.30**	**£3.73**	**£1.70**	**£34.08**
Local Shops in Breckland	**£0.00**	**£2.66**	**£0.36**	**£0.00**	**£0.51**	**£1.99**	**£0.29**	**£5.81**
Breckland District Total	**£85.20**	**£74.51**	**£29.43**	**£32.09**	**£36.89**	**£12.45**	**£21.91**	**£292.49**
Expenditure Outflow	£40.10	£14.19	£6.46	£2.05	£13.65	£12.45	**n/a**	**£88.89**
Grand Total	**£125.30**	**£88.71**	**£35.89**	**£34.13**	**£50.54**	**£24.90**	***n/a***	***£381.39***

Sources: Table 3B and 4B

Table 10B: Summary of Convenience Turnover 2010 to 2026 (£ million)

Town	2010	2013	2016	2021	2026
Available Expenditure					
Thetford	£83.00	£86.75	£89.96	£97.54	£105.04
Dereham	£90.41	£92.49	£93.96	£97.07	£99.78
Swaffham	£24.21	£24.92	£25.47	£26.42	£27.23
Watton	£18.33	£18.84	£19.23	£19.89	£20.55
Attleborough	£26.19	£27.24	£28.11	£30.42	£34.08
Local shops	£5.23	£5.35	£5.43	£5.61	£5.81
District Total	**£247.37**	**£255.59**	**£262.16**	**£276.96**	**£292.49**
Benchmark Turnover					
Thetford	£73.81	£74.25	£74.92	£76.05	£77.20
Dereham	£75.19	£75.64	£76.32	£77.48	£78.65
Swaffham	£34.49	£34.70	£35.01	£35.54	£36.08
Watton	£17.55	£17.66	£17.81	£18.08	£18.36
Attleborough	£17.81	£17.92	£18.08	£18.35	£18.63
Local shops	£5.23	£5.26	£5.31	£5.39	£5.47
District Total	**£224.08**	**£225.43**	**£227.46**	**£230.89**	**£234.38**
Commitments Turnover					
Thetford	£11.73	£11.80	£11.91	£12.09	£12.27
Dereham	£1.65	£1.66	£1.67	£1.70	£1.73
Swaffham	£0.00	£0.00	£0.00	£0.00	£0.00
Watton	£11.35	£11.42	£11.52	£11.70	£11.87
Attleborough	£0.00	£0.00	£0.00	£0.00	£0.00
Local shops	£0.00	£0.00	£0.00	£0.00	£0.00
District Total	**£24.73**	**£24.88**	**£25.10**	**£25.48**	**£25.87**
Surplus Expenditure					
Thetford	-£2.54	£0.70	£3.13	£9.40	£15.56
Dereham	£13.57	£15.19	£15.96	£17.90	£19.41
Swaffham	-£10.28	-£9.77	-£9.54	-£9.12	-£8.85
Watton	-£10.57	-£10.23	-£10.10	-£9.89	-£9.67
Attleborough	£8.38	£9.32	£10.03	£12.07	£15.45
Local shops	£0.00	£0.08	£0.12	£0.23	£0.34
District Total	**-£1.44**	**£5.29**	**£9.59**	**£20.58**	**£32.25**

Sources: Tables 1A, 3A and 5B to 9B

Table 11B: Convenience Goods Floorspace Projections

	2010 - 2016	2010 - 2021	2010 - 2026
Surplus Expenditure £M			
Thetford	3.13	9.40	15.56
Dereham	15.96	17.90	19.41
Swaffham	-9.54	-9.12	-8.85
Watton	-10.10	-9.89	-9.67
Attleborough	10.03	12.07	15.45
Local Shops	0.12	0.23	0.34
Total	**9.59**	**20.58**	**32.25**
Net Sales Floorspace Sq. M			
Thetford	330	948	1,547
Dereham	1,684	1,805	1,929
Swaffham	n/a	n/a	n/a
Watton	n/a	n/a	n/a
Attleborough	1,058	1,218	1,536
Local Shops	34	63	92
Total	**3,107**	**4,034**	**5,103**
Gross Floorspace Sq. M			
Thetford	472	1,354	2,210
Dereham	2,405	2,579	2,756
Swaffham	n/a	n/a	n/a
Watton	n/a	n/a	n/a
Attleborough	1,512	1,739	2,194
Local Shops	49	89	132
Total	**4,438**	**5,762**	**7,291**

Average Turnover Density of £9,621 per sq m and £3,500 per sq m for local shops, inflated at 0.3% per annum from 2012 to 2026

Appendix 3 Comparison Retail Assessment

Table 1C: Comparison Goods Expenditure Per Capita (2008 Prices)

Expenditure Per Capita		2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1. Thetford	**IP24 1**	£2,492	£2,762	£3,156	£3,971	£4,996	26.6%	59.3%	100.5%
	IP24 2	£2,801	£3,104	£3,547	£4,463	£5,615	26.6%	59.3%	100.5%
	IP24 3	£2,337	£2,590	£2,959	£3,723	£4,684	26.6%	59.3%	100.4%
	IP26 4	£2,628	£2,913	£3,328	£4,187	£5,268	26.6%	59.3%	100.5%
	IP26 5	£2,838	£3,145	£3,594	£4,522	£5,689	26.6%	59.3%	100.5%
	IP27 0	£2,553	£2,829	£3,233	£4,068	£5,118	26.6%	59.3%	100.5%
	IP27 9	£2,371	£2,628	£3,002	£3,777	£4,752	26.6%	59.3%	100.4%
2. Dereham	**NR19 1**	£2,683	£2,973	£3,398	£4,275	£5,379	26.6%	59.3%	100.5%
	NR19 2	£2,681	£2,971	£3,396	£4,272	£5,375	26.7%	59.3%	100.5%
	NR20 3	£2,875	£3,186	£3,641	£4,580	£5,763	26.6%	59.3%	100.5%
	NR20 4	£2,770	£3,070	£3,508	£4,413	£5,552	26.6%	59.3%	100.4%
	NR20 5	£3,096	£3,431	£3,921	£4,933	£6,206	26.6%	59.3%	100.5%
	NR9 4	£2,945	£3,264	£3,729	£4,692	£5,903	26.6%	59.3%	100.4%
3. Swaffham	**PE32 2**	£3,044	£3,374	£3,855	£4,851	£6,103	26.6%	59.4%	100.5%
	PE37 7	£2,557	£2,834	£3,238	£4,074	£5,126	26.6%	59.3%	100.5%
	PE37 8	£2,718	£3,012	£3,442	£4,331	£5,449	26.6%	59.3%	100.5%
4. Watton	**IP25 6**	£2,429	£2,692	£3,076	£3,870	£4,869	26.6%	59.3%	100.5%
	IP25 7	£2,882	£3,194	£3,650	£4,592	£5,778	26.6%	59.3%	100.5%
5. Attleborough	**NR17 1**	£2,993	£3,317	£3,790	£4,768	£5,999	26.6%	59.3%	100.4%
	NR17 2	£2,649	£2,936	£3,355	£4,221	£5,310	26.7%	59.3%	100.5%
	NR18 9	£2,714	£3,008	£3,438	£4,325	£5,441	26.7%	59.4%	100.5%
6. SE Breckland	**NR16 2**	£2,802	£3,105	£3,548	£4,464	£5,617	26.6%	59.3%	100.5%
	IP22 2	£3,204	£3,551	£4,057	£5,104	£6,422	26.6%	59.3%	100.4%

Experian local estimates of 2008 comparison goods expenditure per capita
Excluding special froms of trading - 8.1% in 2009, 8.5% in 2010, 8.9% in 2011 and beyond
Experian Business Strategies - forecast annual growth rates for 2008 to 2011 (1.1%,- 0.4% and 1.1%)
Experian Business Strategies - ultra long term growth rate adopted beyond 2011 (4.7% per annum)

Table 2C: Total Available Comparison Goods Expenditure (£M - 2008 Prices)

Available Expenditure		2010	2013	2016	2021	2026	Growth 2010-2016	Growth 2010-2021	Growth 2010-2026
1. Thetford	**IP24 1**	£23.98	£27.92	£33.43	£46.91	£63.84	39.4%	95.6%	166.2%
	IP24 2	£25.30	£29.53	£35.46	£50.06	£68.40	40.2%	97.9%	170.4%
	IP24 3	£19.34	£21.98	£25.73	£33.72	£44.21	33.0%	74.3%	128.5%
	IP26 4	£15.11	£17.04	£19.80	£25.55	£32.91	31.0%	69.0%	117.7%
	IP26 5	£10.96	£12.18	£13.96	£17.56	£22.10	27.3%	60.2%	101.5%
	IP27 0	£28.30	£32.16	£37.65	£49.35	£64.69	33.0%	74.4%	128.6%
	IP27 9	£22.80	£25.90	£30.32	£39.74	£52.09	33.0%	74.3%	128.5%
Zone 1 Total		**£145.80**	**£166.71**	**£196.34**	**£262.90**	**£348.24**	**34.7%**	**80.3%**	**138.8%**
2. Dereham	**NR19 1**	£27.44	£30.56	£35.11	£44.51	£56.00	27.9%	62.2%	104.1%
	NR19 2	£25.14	£28.01	£32.18	£40.83	£51.37	28.0%	62.4%	104.3%
	NR20 3	£19.29	£21.52	£24.75	£31.49	£39.63	28.3%	63.2%	105.4%
	NR20 4	£21.35	£23.80	£27.36	£34.77	£43.74	28.1%	62.9%	104.9%
	NR20 5	£15.96	£17.74	£20.32	£25.56	£32.16	27.3%	60.2%	101.5%
	NR9 4	£14.40	£16.00	£18.33	£23.06	£29.01	27.3%	60.2%	101.5%
Zone 2 Total		**£109.18**	**£121.63**	**£139.71**	**£177.16**	**£222.90**	**28.0%**	**62.3%**	**104.2%**
3. Swaffham	**PE32 2**	£20.75	£23.06	£26.42	£33.25	£41.83	27.3%	60.2%	101.5%
	PE37 7	£17.36	£19.77	£23.19	£29.67	£37.33	33.6%	71.0%	115.1%
	PE37 8	£10.38	£11.54	£13.22	£16.63	£20.93	27.3%	60.2%	101.5%
Zone 3 Total		**£48.49**	**£54.37**	**£62.83**	**£79.55**	**£100.09**	**29.6%**	**64.0%**	**106.4%**
4. Watton	**IP25 6**	£26.21	£29.31	£33.78	£42.58	£53.57	28.9%	62.5%	104.4%
	IP25 7	£20.73	£23.25	£26.89	£33.92	£42.69	29.7%	63.6%	105.9%
Zone 4 Total		**£46.94**	**£52.56**	**£60.67**	**£76.50**	**£96.26**	**29.3%**	**63.0%**	**105.1%**
5. Attleborough	**NR17 1**	£22.52	£25.40	£29.52	£38.69	£52.76	31.1%	71.7%	134.2%
	NR17 2	£21.92	£25.12	£29.66	£40.51	£59.39	35.3%	84.8%	171.0%
	NR18 9	£13.92	£15.90	£18.72	£25.13	£33.10	34.4%	80.5%	137.8%
Zone 5 Total		**£58.36**	**£66.42**	**£77.90**	**£104.32**	**£145.24**	**33.5%**	**78.7%**	**148.9%**
6. SE Breckland	**NR16 2**	£19.03	£21.15	£24.23	£30.48	£38.36	£0.00	60.2%	101.5%
	IP22 2	£17.07	£18.97	£21.73	£27.34	£34.40	£0.00	60.1%	101.5%
Zone 6 Total		**£36.11**	**£40.12**	**£45.96**	**£57.82**	**£72.76**	**£0.00**	**60.1%**	**101.5%**
TOTAL		**£444.88**	**£501.81**	**£583.42**	**£758.26**	**£985.49**	**31.1%**	**70.4%**	**121.5%**

Sources: *Table 1C and Table 1B*

Table 3C: **Comparison Shopping Penetration Rates and Available Expenditure 2010**

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expenditure
Available Expenditure 2010	**£145.80**	**£109.18**	**£48.49**	**£46.94**	**£58.36**	**£36.11**	**n/a**	**£444.88**
Market Share								
Thetford	41%	0%	0%	5%	8%	22%	5%	
Dereham	1%	48%	27%	32%	7%	0%	5%	
Swaffham	1%	1%	12%	1%	0%	0%	5%	
Watton	0%	0%	1%	27%	1%	1%	2%	
Attleborough	0%	0%	0%	1%	19%	6%	5%	
District Area Total	**43%**	**49%**	**40%**	**66%**	**35%**	**29%**	**n/a**	
Expenditure Outflow	**57%**	**51%**	**60%**	**34%**	**65%**	**71%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1 Thetford	**Zone 2 Dereham**	**Zone 3 Swaffham**	**Zone 4 Watton**	**Zone 5 Attleborough**	**Zone 6 SE Breckland**	**Inflow Expend.**	**Total £M**
Turnover £M								
Thetford	£59.78	£0.00	£0.00	£2.35	£4.67	£7.94	£3.93	£78.67
Dereham	£1.46	£52.41	£13.09	£15.02	£4.09	£0.00	£4.53	£90.59
Swaffham	£1.46	£1.09	£5.82	£0.47	£0.00	£0.00	£0.47	£9.30
Watton	£0.00	£0.00	£0.48	£12.67	£0.58	£0.36	£0.29	£14.39
Attleborough	£0.00	£0.00	£0.00	£0.47	£11.09	£2.17	£0.72	£14.45
District Area Total	**£62.69**	**£53.50**	**£19.40**	**£30.98**	**£20.43**	**£10.47**	**£9.94**	**£207.41**
Expenditure Outflow	**£83.11**	**£55.68**	**£29.10**	**£15.96**	**£37.94**	**£25.64**	**n/a**	**n/a**
Expenditure Total	***£145.80***	***£109.18***	***£48.49***	***£46.94***	***£58.36***	***£36.11***	***n/a***	***n/a***

Sources: *Table 2C*
NEMS Household Survey 2010
NLP

Table 4C: **Comparison Shopping Penetration Rates and Available Expenditure 2013**

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expenditure
Available Expenditure 2013	**£166.71**	**£121.63**	**£54.37**	**£52.56**	**£66.42**	**£40.12**	**n/a**	**£501.81**
Market Share								
Thetford	41%	0%	0%	5%	8%	22%	5%	
Dereham	1%	48%	27%	32%	7%	0%	5%	
Swaffham	1%	1%	12%	1%	0%	0%	5%	
Watton	0%	0%	1%	27%	1%	1%	2%	
Attleborough	0%	0%	0%	1%	19%	6%	5%	
District Area Total	**43%**	**49%**	**40%**	**66%**	**35%**	**29%**	**n/a**	
Expenditure Outflow	**57%**	**51%**	**60%**	**34%**	**65%**	**71%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1 Thetford	**Zone 2 Dereham**	**Zone 3 Swaffham**	**Zone 4 Watton**	**Zone 5 Attleborough**	**Zone 6 SE Breckland**	**Inflow Expend.**	**Total £M**
Turnover £M								
Thetford	£68.35	£0.00	£0.00	£2.63	£5.31	£8.83	£4.48	£89.60
Dereham	£1.67	£58.38	£14.68	£16.82	£4.65	£0.00	£5.06	£101.26
Swaffham	£1.67	£1.22	£6.52	£0.53	£0.00	£0.00	£0.52	£10.46
Watton	£0.00	£0.00	£0.54	£14.19	£0.66	£0.40	£0.32	£16.12
Attleborough	£0.00	£0.00	£0.00	£0.53	£12.62	£2.41	£0.82	£16.37
District Area Total	**£71.68**	**£59.60**	**£21.75**	**£34.69**	**£23.25**	**£11.64**	**£11.21**	**£233.81**
Expenditure Outflow	**£95.02**	**£62.03**	**£32.62**	**£17.87**	**£43.18**	**£28.49**	**n/a**	**n/a**
Expenditure Total	***£166.71***	***£121.63***	***£54.37***	***£52.56***	***£66.42***	***£40.12***	***n/a***	***n/a***

Sources: *Table 2C*
NEMS Household Survey 2010
NLP

Table 5C: Comparison Shopping Penetration Rates and Available Expenditure 2016

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expenditure
Available Expenditure 2016	**£196.34**	**£139.71**	**£62.83**	**£60.67**	**£77.90**	**£45.96**	**n/a**	**£583.42**
Market Share								
Thetford	42%	0%	0%	5%	8%	22%	5%	
Dereham	1%	48%	27%	32%	7%	0%	5%	
Swaffham	1%	1%	12%	1%	0%	0%	5%	
Watton	0%	0%	1%	27%	1%	1%	2%	
Attleborough	0%	0%	0%	1%	19%	6%	5%	
District Area Total	**44%**	**49%**	**40%**	**66%**	**35%**	**29%**	**n/a**	
Expenditure Outflow	**56%**	**51%**	**60%**	**34%**	**65%**	**71%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1 Thetford	**Zone 2 Dereham**	**Zone 3 Swaffham**	**Zone 4 Watton**	**Zone 5 Attleborough**	**Zone 6 SE Breckland**	**Inflow Expend.**	**Total £M**
Turnover £M								
Thetford	£82.46	£0.00	£0.00	£3.03	£6.23	£10.11	£5.36	£107.20
Dereham	£1.96	£67.06	£16.97	£19.42	£5.45	£0.00	£5.83	£116.69
Swaffham	£1.96	£1.40	£7.54	£0.61	£0.00	£0.00	£0.61	£12.11
Watton	£0.00	£0.00	£0.63	£16.38	£0.78	£0.46	£0.37	£18.62
Attleborough	£0.00	£0.00	£0.00	£0.61	£14.80	£2.76	£0.96	£19.12
District Area Total	**£86.39**	**£68.46**	**£25.13**	**£40.05**	**£27.26**	**£13.33**	**£13.13**	**£273.75**
Expenditure Outflow	**£109.95**	**£71.25**	**£37.70**	**£20.63**	**£50.63**	**£32.63**	**n/a**	**n/a**
Expenditure Total	***£196.34***	***£139.71***	***£62.83***	***£60.67***	***£77.90***	***£45.96***	***n/a***	***n/a***

Table 6C: **Comparison Shopping Penetration Rates and Available Expenditure 2021**

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expenditure
Available Expenditure 2021	**£262.90**	**£177.16**	**£79.55**	**£76.50**	**£104.32**	**£57.82**	**n/a**	**£758.26**
Market Share								
Thetford	42%	0%	0%	5%	8%	22%	5%	
Dereham	1%	48%	27%	32%	7%	0%	5%	
Swaffham	1%	1%	12%	1%	0%	0%	5%	
Watton	0%	0%	1%	27%	1%	1%	2%	
Attleborough	0%	0%	0%	1%	19%	6%	5%	
District Area Total	**44%**	**49%**	**40%**	**66%**	**35%**	**29%**	**n/a**	
Expenditure Outflow	**56%**	**51%**	**60%**	**34%**	**65%**	**71%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1 Thetford	**Zone 2 Dereham**	**Zone 3 Swaffham**	**Zone 4 Watton**	**Zone 5 Attleborough**	**Zone 6 SE Breckland**	**Inflow Expend.**	**Total £M**
Turnover £M								
Thetford	£110.42	£0.00	£0.00	£3.83	£8.35	£12.72	£7.12	£142.43
Dereham	£2.63	£85.04	£21.48	£24.48	£7.30	£0.00	£7.42	£148.35
Swaffham	£2.63	£1.77	£9.55	£0.77	£0.00	£0.00	£0.77	£15.49
Watton	£0.00	£0.00	£0.80	£20.66	£1.04	£0.58	£0.47	£23.54
Attleborough	£0.00	£0.00	£0.00	£0.77	£19.82	£3.47	£1.27	£25.32
District Area Total	**£115.68**	**£86.81**	**£31.82**	**£50.49**	**£36.51**	**£16.77**	**£17.05**	**£355.13**
Expenditure Outflow	**£147.22**	**£90.35**	**£47.73**	**£26.01**	**£67.81**	**£41.06**	**n/a**	**n/a**
Expenditure Total	***£262.90***	***£177.16***	***£79.55***	***£76.50***	***£104.32***	***£57.82***	***n/a***	***n/a***

Table 7C: Comparison Shopping Penetration Rates and Available Expenditure 2026

Centre/Facilities	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE Breckland	% Inflow	Total Expenditure
Available Expenditure 2026	**£348.24**	**£222.90**	**£100.09**	**£96.26**	**£145.24**	**£72.76**	**n/a**	**£985.49**
Market Share								
Thetford	42%	0%	0%	5%	8%	22%	5%	
Dereham	1%	48%	27%	32%	7%	0%	5%	
Swaffham	1%	1%	12%	1%	0%	0%	5%	
Watton	0%	0%	1%	27%	1%	1%	2%	
Attleborough	0%	0%	0%	1%	19%	6%	5%	
District Area Total	**44%**	**49%**	**40%**	**66%**	**35%**	**29%**	**n/a**	
Expenditure Outflow	**56%**	**51%**	**60%**	**34%**	**65%**	**71%**	**n/a**	
Market Share Total	***100%***	***100%***	***100%***	***100%***	***100%***	***100%***	***n/a***	
	Zone 1 Thetford	**Zone 2 Dereham**	**Zone 3 Swaffham**	**Zone 4 Watton**	**Zone 5 Attleborough**	**Zone 6 SE Breckland**	**Inflow Expend.**	**Total £M**
Turnover £M								
Thetford	£146.26	£0.00	£0.00	£4.81	£11.62	£16.01	£9.41	£188.11
Dereham	£3.48	£106.99	£27.02	£30.80	£10.17	£0.00	£9.39	£187.86
Swaffham	£3.48	£2.23	£12.01	£0.96	£0.00	£0.00	£0.98	£19.67
Watton	£0.00	£0.00	£1.00	£25.99	£1.45	£0.73	£0.60	£29.77
Attleborough	£0.00	£0.00	£0.00	£0.96	£27.60	£4.37	£1.73	£34.66
District Area Total	**£153.23**	**£109.22**	**£40.04**	**£63.53**	**£50.84**	**£21.10**	**£22.11**	**£460.06**
Expenditure Outflow	**£195.02**	**£113.68**	**£60.05**	**£32.73**	**£94.41**	**£51.66**	**n/a**	**n/a**
Expenditure Total	***£348.24***	***£222.90***	***£100.09***	***£96.26***	***£145.24***	***£72.76***	***n/a***	***n/a***

Table 8C: Summary of Comparison Surplus Expenditure 2010 to 2026

Town	2010	2013	2016	2021	2026
Available Expenditure					
Thetford	£78.67	£89.60	£107.20	£142.43	£188.11
Dereham	£90.59	£101.26	£116.69	£148.35	£187.86
Swaffham	£9.30	£10.46	£12.11	£15.49	£19.67
Watton	£14.39	£16.12	£18.62	£23.54	£29.77
Attleborough	£14.45	£16.37	£19.12	£25.32	£34.66
Total	**£207.41**	**£233.81**	**£273.75**	**£355.13**	**£460.06**
Commitments					
Thetford	£19.28	£20.06	£21.29	£23.50	£25.95
Dereham	£6.45	£6.71	£7.12	£7.86	£8.68
Swaffham	£0.00	£0.00	£0.00	£0.00	£0.00
Watton	£0.00	£0.00	£0.00	£0.00	£0.00
Attleborough	£0.00	£0.00	£0.00	£0.00	£0.00
Total	**£25.73**	**£26.77**	**£28.41**	**£31.36**	**£34.63**
Turnover of Existing Floorspace/Commitments					
Thetford	£97.95	£101.91	£108.15	£119.40	£131.83
Dereham	£97.04	£100.96	£107.14	£118.30	£130.61
Swaffham	£9.30	£9.68	£10.27	£11.34	£12.52
Watton	£14.39	£14.97	£15.89	£17.54	£19.37
Attleborough	£14.45	£15.03	£15.95	£17.61	£19.44
Total	**£233.14**	**£242.56**	**£257.40**	**£284.19**	**£313.77**
Surplus Expenditure					
Thetford	-£19.28	-£12.31	-£0.95	£23.03	£56.28
Dereham	-£6.45	£0.30	£9.55	£30.05	£57.25
Swaffham	£0.00	£0.78	£1.84	£4.15	£7.15
Watton	£0.00	£1.15	£2.73	£6.00	£10.40
Attleborough	£0.00	£1.34	£3.17	£7.71	£15.21
Total	**-£25.73**	**-£8.75**	**£16.35**	**£70.94**	**£146.29**

Sources: Tables 2A to 4A and 3C to 7C

Table 9C: Comparison Floorspace Projections 2010 to 2026

Centre	2010	2013	2016	2021	2026
Surplus Expenditure					
Thetford	-£19.28	-£12.31	-£0.95	£23.03	£56.28
Dereham	-£6.45	£0.30	£9.55	£30.05	£57.25
Swaffham	£0.00	£0.78	£1.84	£4.15	£7.15
Watton	£0.00	£1.15	£2.73	£6.00	£10.40
Attleborough	£0.00	£1.34	£3.17	£7.71	£15.21
Breckland Total	**-£25.73**	**-£8.75**	**£16.35**	**£70.94**	**£146.29**
Turnover Density New Floorspace £ per sq.m net	£5,000	£5,202	£5,520	£6,095	£6,729
New Floorspace Sales Density sq.m net					
Thetford	n/a	-2,366	-172	3,778	8,363
Dereham	n/a	57	1,730	4,931	8,508
Swaffham	n/a	149	334	680	1,062
Watton	n/a	221	495	985	1,545
Attleborough	n/a	258	574	1,265	2,261
Breckland District Total Floorspace sq.m net	**n/a**	**-1,681**	**2,961**	**11,638**	**21,739**
Gross Floorspace sq.m					
Thetford	n/a	-3,155	-229	5,038	11,150
Dereham	n/a	76	2,307	6,574	11,344
Swaffham	n/a	199	445	907	1,416
Watton	n/a	295	660	1,313	2,060
Attleborough	n/a	344	766	1,687	3,014
Breckland District Total Floorspace sq.m gross	**n/a**	**-2,242**	**3,948**	**15,518**	**28,985**

Appendix 4 Operator Requirements

Breckland Council

Operator Requirements Survey

Approximately 300 questionnaires were sent to a range of national/regional retail and leisure companies.

17 responses were received (6% response rate) from the following companies:

Companies with a requirement

Operator & Trading Names	Space Required (sq.ft)	Locations
WH Smith	2,500 sqft	Dereham town centre, Swaffham town centre
Morrisons Supermarket	30,000 sqft net sales (Thetford); 16,000 sqft net sales (Attleborough and Swaffham	Thetford out of centre, Attleborough out of centre, Swaffham town centre, Swaffham out of centre
Barnados	1,000 sqft	Thetford out of centre, Dereham out of centre, Attleborough out of centre, Swaffham out of centre, Watton out of centre, Local shopping parades

Companies with no current requirement

Shoe Zone Group

Debenhams

Mamas and Papas (Retail) Ltd

DFS Furniture

Matalan

Maplin Electronics

Swinton Group Ltd

The National Trust

Thorntons Plc

Vets 4 Pets Limited

Toys R Us Limited

Schuh Ltd

SCS

Jaeger Co Shops Ltd

Questionnaire Results

1 Does your company have a requirement for new or expanded premises in Breckland?

- Yes 3 (18%)
- No 14 (82%)
- Total 17

2 What are the main reasons why you are not looking for premises?

- No business need for new or additional premises (3)
- Existing retail premises in the District is sufficient for purpose, no requirement for new store (1)
- Existing premises in surrounding areas is sufficient (2)
- The towns are too small (5)
- No reason stated (3)

3 What additional information might influence you in deciding to locate in Breckland?

- No reasons stated

4 What has prevented you from securing this requirement to date?

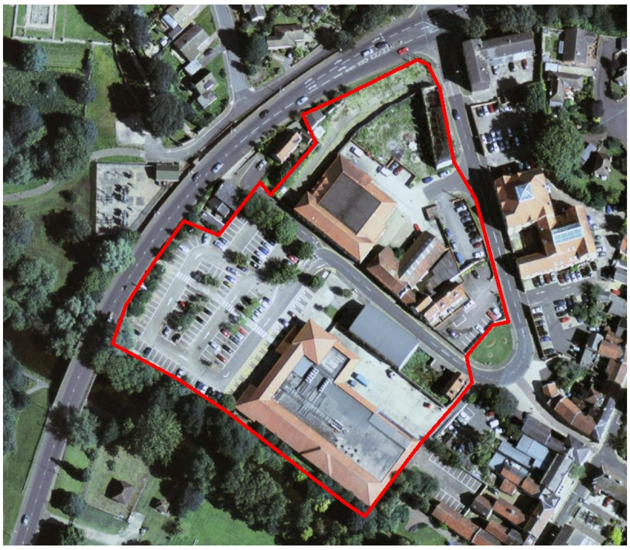
- Suitable sized town centre sites
- The location of available units

Appendix 5 Household Survey Results

Appendix 6 Development Sites

SITE T1: Community Hall, Well Street, Thetford	
	The community centre is located within the primary commercial area and could provide a development site of approx. 0.2 ha. The building is relatively unattractive and relatively low density. It provides a poor setting for the Guildhall and any potential redevelopment opportunity should take account of the site's proximity to the listed Guildhall building.
Evaluation Criteria	**Comment**
Availability	Medium term.
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq m gross) at ground floor level.
Commercial Potential	Prime site with good frontage onto Well Street.
Likely Type of Development	Up to 8 small shop/A3 units on the Well Street frontage or a commercial leisure use. Residential or community uses could be provided on upper floors.
Development Constraints	Need to relocate community facility and availability for development uncertain. Archaeology and flood risk issues will need to be addressed.
Possible Alternative Uses	Retention of existing use or redevelopment for residential.
Access	Service access via Cage Lane.
Overall Development Prospects	Reasonable

SITE T2: Minstergate/Burrell Museum/Poundstretcher, Thetford

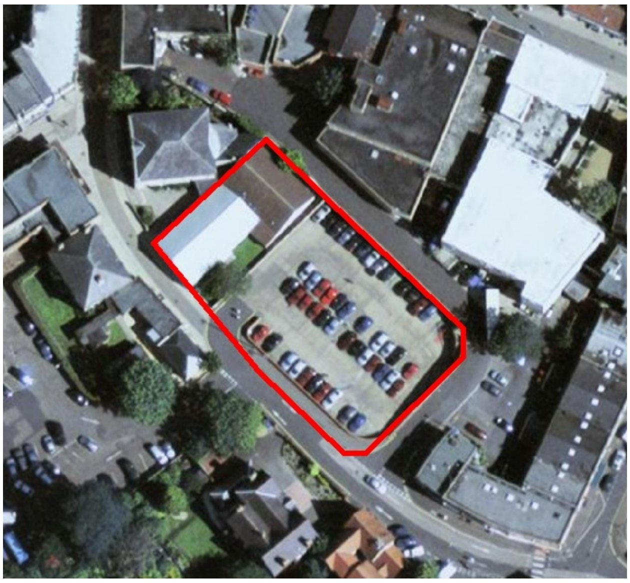


The area occupied by the Museum, existing retail stores and vacant building between Minstergate and St Nicholas Street could provide potential to be redeveloped and refurbished for commercial use. The area (approx. 1.7 ha) contains several rundown listed buildings, which are in need of investment. The former Kwik Save outlet is now occupied by Poundstretcher and Wilkinson is single storey and retail use could be intensified.

Evaluation Criteria	Comment
Availability	Medium to long term.
Scale of Development (retail/leisure/community/cultural)	Large scale (up to 3,000 sq m) net increase over existing retail space.
Commercial Potential	Off-prime site but within town centre with potential to enhance existing listed buildings and intensify existing commercial space.
Likely Type of Development	The area north of Minstergate and adjacent to the Burrell Museum could provide small specialist shops, Class A3 or D2 leisure uses. Any development will have to be of a high quality design and utilise Listed building structures. The existing modern retail units could be intensified to provide 2-storey retail development e.g. upward extension or redevelopment.
Development Constraints	The refurbishment of listed buildings on the site may be costly and will restrict the form and nature of redevelopment. Value of existing retail uniting may prohibit redevelopment. Archaeology and flood risk issues will need to be addressed.
Possible Alternative Uses	Retention of existing retail/museum uses. Employment or residential development.
Access	Existing vehicular access off Minster Gate and St Nicholas St.
Overall Development Prospects	Reasonable

SITE T3: Bridge Street Car Park and Anchor Hotel, Thetford	
	This public surface car park and vacant hotel could provide a redevelopment of approx. 0.7 ha). It provides an opportunity to develop units fronting on to Bridge Street and along the southern edge of the River Thet.
Evaluation Criteria	**Comment**
Availability	Medium Term
Scale of Development (retail/leisure/community/cultural)	Large scale (up to 4,000 sq m)
Commercial Potential	Off-prime site just outside the primary commercial area. However the site is in a prominent location opposite the Riverside retail development.
Likely Type of Development	Small/medium size A1 or A3 units along river frontage with pedestrianised area along river frontage.
Development Constraints	Proposal for educational use may suggest the site is unavailable for retail use. Impact on river setting. Need to replace lost car parking spaces and relocate bus stops. Archaeology and flood risk issues will need to be addressed.
Possible Alternative Uses	Proposed educational use. Retention of surface car parking and bus station.
Access	Existing car park vehicular access.
Overall Development Prospects	Good (subject to availability)

SITE T4: Riverside Walk, Thetford	
	The Riverside Walk development is located in the heart of the town centre. Vacancy levels in this part of the town centre are relatively high and investment is needed. The development including adjacent car parks and servicing areas is approx. 0.9 hectares in size. The area could be comprehensively redeveloped or extended to provide more retail/leisure floorspace. For example the car park to the rear of Argos could provide an opportunity to extend the centre.
Evaluation Criteria	**Comment**
Availability	Medium to long term
Scale of Development (retail/leisure/community/cultural)	Comprehensive redevelopment - Medium scale (up to 2,000 sq m) Extension to existing development – Small scale (up to 1,000 sq m)
Commercial Potential	Prime site within the heart of the town centre.
Likely Type of Development	Extension and Refurbishment of existing development with provision of additional or enlarged retail units. The development could be extended on to the adjacent car park and replacement car parking could be provided at the Tanner Street car park (see Site T5). Archaeology and flood risk issues will need to be addressed.
Development Constraints	Loss of public car park and cost of redevelopment. Impact of increase development mass on the conservation area.
Possible Alternative Uses	Retention of existing Riverside Walk development.
Access	Existing vehicular access from Tanner Street.
Overall Development Prospects	Reasonable

SITE T5: Tanner Street Car Park, Thetford	
	The public car park, and possibly the adjacent hall to the west, could provide a development site of approx. 0.2 ha. It is located within the primary commercial area. The site may provide an opportunity to develop a multi storey car park, which could free up other surface car parks for redevelopment, e.g. allowing an extension to Riverside Walk. This site could also be developed in conjunction with 1960s retail units on King Street which back on to the car park (5-13 King Street). Archaeology and flood risk issues will need to be addressed.
Evaluation Criteria	**Comment**
Availability	Medium to Long term
Scale of Development (retail/leisure/community/cultural)	Small scale if developed in isolation (up to 500 sq m). Medium scale if included with adjoining sites.
Commercial Potential	Located in the heart of the town centre. However, the site's frontage on Tanner Street is a secondary/off prime location.
Likely Type of Development	Comprehensive redevelopment with units on King Street or redevelopment to provide a multi storey car park, developed in conjunction with an extension of Riverside Walk (Site T4). If the site is developed in isolation it could accommodate a single large format store of about 500 sq m or small unit shops fronting on to Tanner Street. Residential accommodation could be provided on upper floors.
Development Constraints	Availability of site and land assembly costs and multiple ownerships.
Possible Alternative Uses	Retain as car park or a residential/mixed use development.
Access	Existing vehicular access from Tanner Street.
Overall Development Prospects	Reasonable

SITE T6: Thetford Retail Park	
	The south west part of the retail park (adjacent to Aldi) is occupied by vacant/relative old warehouse premises and the adjacent site is occupied by out-buildings. This part of the retail park could be redeveloped to provide modern new retail warehouse premises and could provide a development site of approx. 0.6 ha.
Evaluation Criteria	**Comment**
Availability	Medium Term
Scale of Development (retail/leisure/community/cultural)	Up to 3,000 sq m gross of single level large format stores, possibly more with mezzanine floors.
Commercial Potential	Part of an existing successful retail park
Likely Type of Development	Large format retail warehouse units.
Development Constraints	Availability of existing quasi-retail uses and neighbouring land uncertain.
Possible Alternative Uses	Retention of existing quasi-retail uses.
Access	Existing access to retail parks.
Overall Development Prospects	Good

SITE D1: TA Centre and Car Sales Garage, Cowper Road, Dereham	
	This large site (approx 0.7 hectares) includes a Territorial Army (TA) Centre and a car sales garage. It is to the east of the town centre just outside the town centre's commercial area on Cowper Road. The site is identified in the Council's Site Specific Allocations consultation as a preferred area for additional retail uses along with site D2 below. These two sites could be developed together to provide a larger development opportunity.
Evaluation Criteria	**Comment**
Availability	Medium to Long Term
Scale of Development (retail/leisure/community/cultural)	Medium scale (Up to 2,500 sq m gross) Large scale with Site D2 (up to 5,000 sq m gross)
Commercial Potential	Off-prime site but with good links into the town centre.
Likely Type of Development	Medium size food store (up to 2,000 sq m gross) or Retail Warehouse/large format store (2,500 sq m gross) Leisure use (2,500 sq m gross) Residential or office use on upper floors.
Development Constraints	Availability of the site uncertain. Cost of relocating existing uses. Visual impact on adjacent Conversation Area and Listed buildings.
Possible Alternative Uses	Retention of existing uses or office or residential use.
Access	Existing vehicular access off Cowper Road and possibly from Norwich Street.
Overall Development Prospects	Reasonable

SITE D2: Land North of Georges Road and Car Park, Dereham	
	The site includes a Kwik-Fit garage on Cowper Road, and other uses including a small surface car park on Georges Road. The site is approximately 1.1 hectares and is just outside the primary commercial area. The site may provide an opportunity for retail and leisure development. The site is identified in the Council's Site Specific Allocations consultation as a preferred area for additional retail uses along with site D1 above. These two sites could be developed together to provide a larger development opportunity.
Evaluation Criteria	**Comment**
Availability	Medium to Long Term.
Scale of Development (retail/leisure/community/cultural)	Medium Scale (Up to 2,000 sq m) – north of Georges Road only. Large Scale (up to 5,000 sq m gross) comprehensive development of car parks and Site D1 included.
Commercial Potential	Off-prime site but within close proximity to the primary commercial area.
Likely Type of Development	Large format/retail warehouse units or a small food store. Commercial leisure uses. Potential for residential on upper floors. Comprehensive development of all sites could provide extension to Nelson Place shopping precinct.
Development Constraints	Availability of the site uncertain – multiple ownerships. Cost of relocating existing uses. The listed building on part of the site would need to be retained. The northern part of the site is relatively narrow.
Possible Alternative Uses	Retention of existing uses or high density residential development.
Access	From Cowper Road and Georges Street.
Overall Development Prospects	Reasonable

SITE D3: Inland Revenue Building, Dereham

This is a small building located off Church Street (approx. 0.1 hectares) previously occupied by the Inland Revenue offices. The site may provide an opportunity to extend the Aldiss Court shopping arcade.

Evaluation Criteria	Comment
Availability	Medium term
Scale of Development (retail/leisure/community/cultural)	Small scale (approx 200 sq m gross)
Commercial Potential	Prime site with the potential to convert the former Inland Revenue building to shop uses and provide a better link through from the High Street to Church Street.
Likely Type of Development	An extension to the Aldiss Court Arcade with small specialist shop/A3 uses.
Development Constraints	Availability of site uncertain.
Possible Alternative Uses	Retention of existing uses or residential development.
Access	Off Church Street.
Overall Development Prospects	Reasonable

SITE S1: Post Office and Former Sixth Form Centre, Lynn Street, Swaffham	
	The Post Office premises and the Sixth Form Centre at rear off Lynn Street occupy a site of approx. 0.8 ha. The site may be an opportunity to provide further larger retail/leisure units in Swaffham.
Evaluation Criteria	**Comment**
Availability	Medium to Long term
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq m gross)
Commercial Potential	Off-prime site but with potential retail frontage onto Lynn Street
Likely Type of Development	Small shop/A3 – A5 units with residential/office units above to provide retail frontage along Lynn Street. Also potential to develop large format store set back on the site with some car parking provision.
Development Constraints	Availability of post office unclear.
Possible Alternative Uses	Retention of existing uses or residential/office development.
Access	Existing access off Lynn Street.
Overall Development Prospects	Reasonable

SITE A1: Petrol Station on Exchange Street, Attleborough	
	This small site on Exchange Street (less than 0.2 hectares is currently an Esso petrol station and garage. The site could be redeveloped.
Evaluation Criteria	**Comment**
Availability	Short to Medium term.
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 1,000 sq m)
Commercial Potential	Prime site with good frontage onto Exchange Street.
Likely Type of Development	Up to three shop/A3-A5 units with residential above.
Development Constraints	Availability of site and relocation of PFS. Potential contamination.
Possible Alternative Uses	Retention of PFS or Office or residential use.
Access	Existing vehicular access from Exchange Street.
Overall Development Prospects	Reasonable

SITE A2: Land at corner of Griffin Lane and Exchange Street, Attleborough	
	The site is on the corner of Griffin Lane and Exchange Street and is approx 0.2 ha in size. Part of the site is a private car park and the building on the site (not listed) is currently vacant.
Evaluation Criteria	**Comment**
Availability	Short term.
Scale of Development (retail/leisure/community/cultural)	Small scale (Up to 500 sq m).
Commercial Potential	Prime site with good road frontage in the commercial area.
Likely Type of Development	Reuse of existing building for A1/A3 to A5 or D2 leisure use. Alternatively redevelopment of site to provide small shop/A3 units with frontage onto Exchange Street, possibly with residential/office above.
Development Constraints	Possible need to retain existing building and mature tree. Availability of entire site uncertain.
Possible Alternative Uses	Development for residential/office.
Access	Existing access off Exchange Street.
Overall Development Prospects	Good

SITE A3: Former Gaymer's Factory, Attleborough	
	This large vacant employment site of approx. 1.5 ha could accommodate large scale retail and leisure uses, subject to compliance with the tests in PPS4 i.e. retail impact and the sequential approach.

Evaluation Criteria	Comment
Availability	Short to medium term.
Scale of Development (retail/leisure/community/cultural)	Large scale - (over 10,000 sq m).
Commercial Potential	Out of centre site but with good road frontage on a main arterial route, which could serve southern expansion of the town and existing residents.
Likely Type of Development	Large food store and/or retail warehousing and large leisure uses.
Development Constraints	Out of centre site where impact on the town centre and shopping travel patterns will be important considerations.
Possible Alternative Uses	Development for residential or employment uses.
Access	Existing access off Station Road.
Overall Development Prospects	Reasonable – (subject to PPS4 test of impact and the sequential approach tests)

SITE W1: Car Park off Memorial Way, Watton	
	The car park off Memorial Way is approx. 0.2 hectares in size. It is located within the commercial area boundary opposite the Tesco supermarket.
Evaluation Criteria	**Comment**
Availability	Short to Medium term.
Scale of Development (retail/leisure/community/cultural)	Small scale (up to 500 sq m).
Commercial Potential	Secondary site but with good road frontage and opposite the Tesco food store.
Likely Type of Development	Small shop/A3 to A5 units with residential above or a single large format retail store or leisure use.
Development Constraints	Potential need to replace public car parking spaces.
Possible Alternative Uses	Retention of existing public car park or residential development.
Access	Existing car park vehicular access.
Overall Development Prospects	Poor (due to potential unacceptable loss of car parking).