

# **Breckland Retail Study Second Addendum**

Breckland District Council

4 May 2018

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## 1.0 Introduction

- 1.1 Lichfields (formerly trading Nathaniel Lichfield and Partners) was commissioned by Breckland District Council to prepare a district wide town centre and retail study in 2010. The 2010 study was fully updated in a report dated December 2014.
- 1.2 Lichfields was been commissioned to undertake a partial update based on the latest population and expenditure projections, set out in Addendum Report dated 31<sup>st</sup> October 2017. Since this report was prepared a major retail development has been granted planning permission at Tulip Viking in Thetford. The retail development comprises six retail units totalling 7,367 sq.m gross of Class A1 retail space and 167 sq.m of Class A3/A5 food and beverage space. The Class A1 retail space is expected to include a B&M store with garden centre (2,880 sq.m gross). Unit C (1,486 sq.m) is expected to be occupied by a food retailer not currently in Thetford.
- 1.3 This report amends the retail floorspace capacity projections in the October 2017 Addendum Report to reflect this new commitment.

## 2.0 Revised Capacity Projections

### Changes since the October 2017 Addendum Report

2.1 Base year market shares for convenience and comparison goods shopping were amended to reflect the implementation of planned retail commitments. The revised future market shares were set out in:

- Future convenience goods shares - Table 7 in Appendix 2 (October 2017 Addendum);
- Future comparison goods shares - Table 7 in Appendix 3 (October 2017 Addendum).

2.2 These market share tables have been further amended to reflect the expected implementation of the Tulip Viking retail commitment in Thetford. The amended market shares are shown in Appendix 1 (convenience goods) and Appendix 2 (comparison goods). Thetford's market shares have been increased to reflect the proposed development, whilst the market shares of other centres have been reduced accordingly.

### Revised Convenience Goods Retail Capacity

2.3 The revised total level of available convenience goods expenditure available for shops in Breckland between 2016 and 2033 is summarised in a new version of Table 13, as shown in Appendix 1 of this report.

2.4 As in the previous addendum, the benchmark turnover of existing convenience floorspace at 2015 and food store commitments have been subtracted from the estimates of available expenditure to provide surplus expenditure estimates. The expected convenience goods turnover of the Tulip Viking commitments has also been subtracted from available expenditure in Thetford.

2.5 The estimates of surplus/deficit expenditure are converted into net floorspace projections in a Table 14 in Appendix 1. The revised floorspace capacity figures are summarised in Table 2.1.

Table 2.1: Summary of Convenience Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	1,034	1,399	1,787	2,155
Dereham	363	622	915	1,198
Swaffham	-3,095	-2,921	-2,741	-2,571
Watton	442	539	639	734
Attleborough	-70	239	542	824
Other Breckland	-41	-15	12	39
<b>Total</b>	<b>-1,366</b>	<b>-137</b>	<b>1,155</b>	<b>2,379</b>

Source: Table 12 in Appendix 1.

### Revised Comparison Goods Retail Capacity

2.6 The revised total level of available comparison goods expenditure available for shops in Breckland between 2016 and 2033 is summarised in a new version of Table 13, as shown in Appendix 2 of this report. Future available expenditure is compared with the projected turnover of existing comparison goods retail facilities within the District in order to provide estimates of surplus expenditure. The estimates of surplus/deficit expenditure are converted into net floorspace projections in Table 14. The figures are summarised in Table 2.2 below.

Table 2.2: Summary of Comparison Goods Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	-2,603	-609	1,638	3,981
Dereham	-172	1,797	4,043	6,391
Swaffham	33	321	645	983
Watton	25	442	910	1,397
Attleborough	-602	2	666	1,354
Other Breckland	-14	23	65	109
<b>Total</b>	<b>-3,334</b>	<b>1,977</b>	<b>7,966</b>	<b>14,215</b>

Source: Table 14 in Appendix 2.

## Revised Food and Beverage Capacity

2.7

The Tulip Viking commitment includes a small element of food and beverage floorspace, which has been subtracted from the Thetford projections in Tables 12 and 13 in Appendix 3. The figures are summarised in Table 2.3.

Table 2.3: Summary of Food and Beverage Floorspace Projections (sq.m gross)

Location	By 2021	By 2026	By 2031	By 2036
Thetford	-13	236	498	757
Dereham	120	352	602	849
Swaffham	41	99	160	220
Watton	32	81	131	181
Attleborough	174	388	607	820
Other Breckland	90	226	367	506
<b>Total</b>	<b>444</b>	<b>1,383</b>	<b>2,365</b>	<b>3,334</b>

Source: Table 13 in Appendix 3.

## 3.0

## Summary Floorspace Projections

## 3.1

The revised floorspace projections are summarised in Tables 3.1, 3.2 and 3.3.

Table 3.1 Convenience Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	1,399	756	<b>2,155</b>
Dereham	622	576	<b>1,198</b>
Swaffham	0	0	<b>0</b>
Watton	539	195	<b>734</b>
Attleborough	239	585	<b>824</b>
Other Breckland	0	39	<b>39</b>
<b>TOTAL</b>	<b>2,799</b>	<b>2,151</b>	<b>4,950</b>

Source: Table 14 in Appendix 1.

Table 3.2 Comparison Goods Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	0	3,981	<b>3,981</b>
Dereham	1,797	4,594	<b>6,391</b>
Swaffham	321	662	<b>983</b>
Watton	442	955	<b>1,397</b>
Attleborough	2	1,352	<b>1,354</b>
Other Breckland	23	86	<b>109</b>
<b>TOTAL</b>	<b>2,585</b>	<b>11,630</b>	<b>14,215</b>

Source: Table 14 in Appendix 2.

Table 3.3 Food and Beverage Floorspace Projections (Sq.M Gross)

Town	Additional Floorspace SQ.M Gross		
	2017 -2026	2026 - 2036	Total
Thetford	236	521	<b>757</b>
Dereham	352	497	<b>849</b>
Swaffham	99	121	<b>220</b>
Watton	81	100	<b>181</b>
Attleborough	388	432	<b>820</b>
Other Breckland	226	280	<b>506</b>
<b>TOTAL</b>	<b>1,383</b>	<b>1,951</b>	<b>3,334</b>

Source: Table 13 in Appendix 3.



# **Appendix 1: Convenience Assessment**

**Table 1: Study Area Population**

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

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

**Table 2: Convenience Goods Expenditure per person (£)**

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	1,963	1,949	1,917	1,909	1,910	1,914
Zone 2 - Dereham	2,159	2,144	2,109	2,100	2,102	2,105
Zone 3 - Swaffham	2,208	2,192	2,157	2,147	2,149	2,153
Zone 4 -Watton	2,185	2,170	2,135	2,126	2,127	2,131
Zone 5 - Attleborough	2,135	2,120	2,085	2,076	2,078	2,082
Zone 6 - South East Breckland	2,327	2,311	2,273	2,264	2,265	2,270

Sources: *Experian Local Expenditure 2015 (2015 prices)*  
*Growth Rates: 0% 2015-2016, -0.2% 2016-2017, -0.9% 2017-2018, 0% 2019 to 2023 and 0.1% p.a. from 2023*  
*Excludes Special Forms of Trading*

**Table 3: Total Convenience Goods Expenditure (£m)**

Zone	2015	2017	2021	2026	2031	2036
Zone 1 - Thetford	113.58	114.20	115.25	118.29	121.56	124.67
Zone 2 - Dereham	99.24	99.32	99.31	100.83	102.66	104.43
Zone 3 - Swaffham	37.91	38.28	38.96	40.39	41.85	43.23
Zone 4 -Watton	41.04	41.39	42.01	43.40	44.85	46.22
Zone 5 - Attleborough	46.79	47.86	49.91	53.17	56.32	59.25
Zone 6 - South East Breckland	28.25	28.27	28.27	28.71	29.24	29.75
<b>Total</b>	<b>366.81</b>	<b>369.32</b>	<b>373.71</b>	<b>384.79</b>	<b>396.47</b>	<b>407.54</b>

Source: *Tables 1 and 2*

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

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

Source: NEMS Household Survey March 2014

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2015</b>	<b>113.58</b>	<b>99.24</b>	<b>37.91</b>	<b>41.04</b>	<b>46.79</b>	<b>28.25</b>		<b>366.81</b>
Sainsbury's, Thetford	19.08	0.40	0.19	0.29	0.94	1.61	2.50	25.00
Tesco, Kilverstne, Thetford	26.12	0.30	0.00	1.76	3.13	3.45	3.86	38.63
Other Thetford	27.26	0.00	0.04	1.68	0.61	1.50	3.45	34.54
<b>Thetford Sub-Total</b>	<b>72.46</b>	<b>0.69</b>	<b>0.23</b>	<b>3.73</b>	<b>4.68</b>	<b>6.55</b>	<b>9.82</b>	<b>98.17</b>
Morrison's, Dereham	0.11	32.75	1.63	3.53	1.40	0.00	2.08	41.50
Tesco, Dereham	0.34	30.57	2.31	5.25	0.84	0.00	2.07	41.38
Other Dereham	0.00	17.47	0.99	2.59	0.09	0.00	1.11	22.24
<b>Dereham Sub-Total</b>	<b>0.45</b>	<b>80.78</b>	<b>4.93</b>	<b>11.37</b>	<b>2.34</b>	<b>0.00</b>	<b>5.26</b>	<b>105.13</b>
Waitrose, Swaffham	0.34	1.29	5.65	0.82	0.00	0.00	1.43	9.53
Tesco, Swaffham	0.34	0.00	10.39	1.23	0.23	0.00	2.15	14.34
Other Swaffham	0.23	0.30	9.14	1.07	0.00	0.00	1.19	11.92
<b>Swaffham Sub-Total</b>	<b>0.91</b>	<b>1.59</b>	<b>25.17</b>	<b>3.12</b>	<b>0.23</b>	<b>0.00</b>	<b>4.77</b>	<b>35.79</b>
Tesco, Watton	1.59	0.10	0.00	16.21	1.03	0.06	0.39	19.37
Other Watton	0.11	0.00	0.00	3.90	0.00	0.00	0.08	4.09
<b>Watton Sub-Total</b>	<b>1.70</b>	<b>0.10</b>	<b>0.00</b>	<b>20.11</b>	<b>1.03</b>	<b>0.06</b>	<b>0.47</b>	<b>23.47</b>
Sansbury's, Attleborough	0.11	0.50	0.00	0.00	20.35	2.12	1.21	24.30
Other Attleborough	0.00	0.00	0.00	0.08	8.61	1.47	0.53	10.70
<b>Attleborough Sub-Total</b>	<b>0.11</b>	<b>0.50</b>	<b>0.00</b>	<b>0.08</b>	<b>28.96</b>	<b>3.59</b>	<b>1.75</b>	<b>34.99</b>
Local Shops in Breckland	0.23	2.08	0.42	1.44	0.80	3.11	0.16	8.23
<b>Breckland DC Total</b>	<b>75.87</b>	<b>85.75</b>	<b>30.74</b>	<b>39.85</b>	<b>38.04</b>	<b>13.31</b>	<b>22.23</b>	<b>305.79</b>
<b>Outside Breckland DC</b>	<b>37.71</b>	<b>13.50</b>	<b>7.16</b>	<b>1.19</b>	<b>8.75</b>	<b>14.94</b>	<b>n/a</b>	<b>83.25</b>
<b>TOTAL</b>	<b>113.58</b>	<b>99.24</b>	<b>37.91</b>	<b>41.04</b>	<b>46.79</b>	<b>28.25</b>	<b>n/a</b>	<b>389.04</b>

Source: Table 3 and 4

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2017</b>	<b>114.20</b>	<b>99.32</b>	<b>38.28</b>	<b>41.39</b>	<b>47.86</b>	<b>28.27</b>		<b>369.32</b>
Thetford	72.86	0.70	0.23	3.77	4.79	6.56	9.88	98.77
Dereham	0.46	80.85	4.98	11.46	2.39	0.00	5.27	105.41
Swaffham	0.91	1.59	25.42	3.15	0.24	0.00	5.52	36.83
Watton	1.71	0.10	0.00	20.28	1.05	0.06	0.47	23.67
Attleborough	0.11	0.50	0.00	0.08	29.62	3.59	3.77	37.68
Local Shops in Breckland	0.23	2.09	0.42	1.45	0.81	3.11	0.17	8.27
<b>Breckland DC Total</b>	<b>76.29</b>	<b>85.81</b>	<b>31.05</b>	<b>40.19</b>	<b>38.91</b>	<b>13.32</b>	<b>25.08</b>	<b>310.64</b>
<b>Outside Breckland DC</b>	<b>37.91</b>	<b>13.51</b>	<b>7.24</b>	<b>1.20</b>	<b>8.95</b>	<b>14.96</b>	<b>n/a</b>	<b>83.76</b>
<b>TOTAL</b>	<b>114.20</b>	<b>99.32</b>	<b>38.28</b>	<b>41.39</b>	<b>47.86</b>	<b>28.27</b>	<b>n/a</b>	<b>394.40</b>

Source: Table 3 and 4

Table 7: Future Convenience Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	65.7%	0.8%	0.6%	10.0%	10.8%	24.4%	10.0%
Dereham	0.4%	83.4%	11.3%	27.5%	4.0%	0.0%	5.0%
Swaffham	0.9%	2.0%	70.0%	7.9%	0.5%	0.0%	15.0%
Watton	1.3%	0.1%	0.0%	46.8%	1.9%	0.2%	2.0%
Attleborough	0.1%	0.5%	0.0%	1.4%	64.7%	19.6%	10.0%
Local Shops in Breckland	0.2%	2.1%	1.1%	3.5%	1.7%	9.5%	2.0%
<b>Breckland DC Total</b>	<b>68.6%</b>	<b>88.9%</b>	<b>83.0%</b>	<b>97.1%</b>	<b>83.6%</b>	<b>53.7%</b>	
<b>Outside Breckland DC</b>	<b>31.4%</b>	<b>11.1%</b>	<b>17.0%</b>	<b>2.9%</b>	<b>16.4%</b>	<b>46.3%</b>	<b>n/a</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>n/a</b>

Source: NEMS Household Survey March 2014 with adjustments to reflect commitments (as at April 2018)

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2021</b>	<b>115.25</b>	<b>99.31</b>	<b>38.96</b>	<b>42.01</b>	<b>49.91</b>	<b>28.27</b>		<b>373.71</b>
Thetford	75.72	0.79	0.23	4.20	5.39	6.90	10.36	103.59
Dereham	0.46	82.82	4.40	11.55	2.00	0.00	5.33	106.56
Swaffham	1.04	1.99	27.27	3.32	0.25	0.00	5.98	39.84
Watton	1.50	0.10	0.00	19.66	0.95	0.06	0.45	22.72
Attleborough	0.12	0.50	0.00	0.59	32.29	5.54	4.34	43.37
Local Shops in Breckland	0.23	2.09	0.43	1.47	0.85	2.69	0.16	7.91
<b>Breckland DC Total</b>	<b>79.06</b>	<b>88.28</b>	<b>32.34</b>	<b>40.79</b>	<b>41.73</b>	<b>15.18</b>	<b>26.61</b>	<b>323.99</b>
<b>Outside Breckland DC</b>	<b>36.19</b>	<b>11.02</b>	<b>6.62</b>	<b>1.22</b>	<b>8.19</b>	<b>13.09</b>	<b>n/a</b>	<b>76.33</b>
<b>TOTAL</b>	<b>115.25</b>	<b>99.31</b>	<b>38.96</b>	<b>42.01</b>	<b>49.91</b>	<b>28.27</b>	<b>n/a</b>	<b>400.32</b>

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2026</b>	<b>118.29</b>	<b>100.83</b>	<b>40.39</b>	<b>43.40</b>	<b>53.17</b>	<b>28.71</b>		<b>384.79</b>
Thetford	77.72	0.81	0.24	4.34	5.74	7.01	10.65	106.51
Dereham	0.47	84.09	4.56	11.94	2.13	0.00	5.43	108.62
Swaffham	1.06	2.02	28.27	3.43	0.27	0.00	6.18	41.23
Watton	1.54	0.10	0.00	20.31	1.01	0.06	0.47	23.49
Attleborough	0.12	0.50	0.00	0.61	34.40	5.63	4.58	45.84
Local Shops in Breckland	0.24	2.12	0.44	1.52	0.90	2.73	0.16	8.11
<b>Breckland DC Total</b>	<b>81.15</b>	<b>89.64</b>	<b>33.52</b>	<b>42.14</b>	<b>44.45</b>	<b>15.42</b>	<b>27.48</b>	<b>333.80</b>
<b>Outside Breckland DC</b>	<b>37.14</b>	<b>11.19</b>	<b>6.87</b>	<b>1.26</b>	<b>8.72</b>	<b>13.29</b>	<b>n/a</b>	<b>78.47</b>
<b>TOTAL</b>	<b>118.29</b>	<b>100.83</b>	<b>40.39</b>	<b>43.40</b>	<b>53.17</b>	<b>28.71</b>	<b>n/a</b>	<b>412.27</b>

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2031</b>	<b>121.56</b>	<b>102.66</b>	<b>41.85</b>	<b>44.85</b>	<b>56.32</b>	<b>29.24</b>		<b>396.47</b>
Thetford	79.87	0.82	0.25	4.49	6.08	7.13	10.96	109.60
Dereham	0.49	85.61	4.73	12.33	2.25	0.00	5.55	110.97
Swaffham	1.09	2.05	29.29	3.54	0.28	0.00	6.40	42.67
Watton	1.58	0.10	0.00	20.99	1.07	0.06	0.49	24.29
Attleborough	0.12	0.51	0.00	0.63	36.44	5.73	4.83	48.26
Local Shops in Breckland	0.24	2.16	0.46	1.57	0.96	2.78	0.17	8.33
<b>Breckland DC Total</b>	<b>83.39</b>	<b>91.26</b>	<b>34.74</b>	<b>43.55</b>	<b>47.08</b>	<b>15.70</b>	<b>28.39</b>	<b>344.11</b>
<b>Outside Breckland DC</b>	<b>38.17</b>	<b>11.39</b>	<b>7.11</b>	<b>1.30</b>	<b>9.24</b>	<b>13.54</b>	<b>n/a</b>	<b>80.75</b>
<b>TOTAL</b>	<b>121.56</b>	<b>102.66</b>	<b>41.85</b>	<b>44.85</b>	<b>56.32</b>	<b>29.24</b>	<b>n/a</b>	<b>424.86</b>

Source: Table 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2036</b>	<b>124.67</b>	<b>104.43</b>	<b>43.23</b>	<b>46.22</b>	<b>59.25</b>	<b>29.75</b>		<b>407.54</b>
Thetford	81.91	0.84	0.26	4.62	6.40	7.26	11.25	112.54
Dereham	0.50	87.10	4.88	12.71	2.37	0.00	5.66	113.22
Swaffham	1.12	2.09	30.26	3.65	0.30	0.00	6.60	44.02
Watton	1.62	0.10	0.00	21.63	1.13	0.06	0.50	25.04
Attleborough	0.12	0.52	0.00	0.65	38.33	5.83	5.05	50.51
Local Shops in Breckland	0.25	2.19	0.48	1.62	1.01	2.83	0.17	8.54
<b>Breckland DC Total</b>	<b>85.52</b>	<b>92.84</b>	<b>35.88</b>	<b>44.88</b>	<b>49.53</b>	<b>15.97</b>	<b>29.24</b>	<b>353.86</b>
<b>Outside Breckland DC</b>	<b>39.15</b>	<b>11.59</b>	<b>7.35</b>	<b>1.34</b>	<b>9.72</b>	<b>13.77</b>	<b>n/a</b>	<b>82.92</b>
<b>TOTAL</b>	<b>124.67</b>	<b>104.43</b>	<b>43.23</b>	<b>46.22</b>	<b>59.25</b>	<b>29.75</b>	<b>n/a</b>	<b>436.78</b>

Source: Table 3 and 7

Table 12: Base Year Convenience Goods Floorspace and Benchmark Turnover

Zone	Store	Sales Floorspace (sq.m net)	Convenience Goods Floorspace (%)	Convenience Goods Floorspace (sq.m net)	Turnover Density (£ per sq.m)	Total Turnover (£m)
<b>Zone 1</b> <b>Thetford</b>	Aldi, Thetford	900	85%	765	£11,557	£8.84
	Iceland, Thetford	377	98%	369	£8,045	£2.97
	Sainsbury, Thetford	4,151	55%	2,283	£11,690	£26.69
	Farm Foods, Thetford	400	100%	400	£7,000	£2.80
	Tesco Express, Thetford	157	98%	154	£11,058	£1.70
	Tesco, Kilverstone Lane, Thetford	4,441	65%	2,887	£11,058	£31.92
	Lidl, Thetford	918	80%	734	£7,723	£5.67
	Other town centre	596	98%	584	£5,000	£2.92
	<b>Sub-Total</b>	<b>11,940</b>		<b>8,177</b>		<b>£83.52</b>
<b>Zone 2</b> <b>Dereham</b>	Co-op, Market Place, Dereham	291	98%	285	£8,903	£2.54
	Iceland, East Dereham	379	98%	371	£8,045	£2.99
	Morrisons, East Dereham	4,061	80%	3,249	£10,849	£35.25
	Roys of Wroxham (conv. only)	250	100%	250	£5,000	£1.25
	Tesco, Dereham	6,846	55%	3,765	£11,058	£41.64
	Co-op, Shipdham Road, Dereham	143	98%	140	£8,903	£1.25
	Lidl, Dereham	1,045	80%	836	£7,723	£6.46
	Aldi, Dereham	1,140	80%	912	£11,557	£10.54
	Other town centre	352	100%	352	£5,000	£1.76
<b>Sub-Total</b>	<b>14,507</b>		<b>10,161</b>		<b>£103.66</b>	
<b>Zone 3</b> <b>Swaffham</b>	Co-op, Swaffham	466	95%	443	£8,903	£3.94
	Asda, Swaffham	968	90%	871	£15,213	£13.25
	Iceland, Swaffham	435	98%	426	£8,903	£3.80
	Other town centre	816	100%	816	£5,000	£4.08
	Waitrose, Swaffham	2,080	85%	1,768	£11,665	£20.62
	Tesco, Swaffham	2,129	80%	1,703	£11,058	£18.83
	<b>Sub-Total</b>	<b>6,894</b>		<b>6,027</b>		<b>£64.53</b>
<b>Zone 4</b> <b>Watton</b>	Tesco, Watton	1,862	75%	1,397	£11,058	£15.44
	Other town centre	749	100%	749	£5,000	£3.75
	<b>Sub-Total</b>	<b>2,611</b>		<b>2,146</b>		<b>£19.19</b>
<b>Zone 5</b> <b>Attleborough</b>	Lidl, Attleborough	1,046	80%	837	£7,723	£6.46
	Sainsbury, Attleborough	1,565	90%	1,409	£11,690	£16.47
	Other town centre	469	100%	469	£5,000	£2.35
	<b>Sub-Total</b>	<b>3,080</b>		<b>2,714</b>		<b>£25.27</b>
<b>Breckland DC Total</b>		<b>39,032</b>		<b>29,225</b>	<b>£10,134</b>	<b>£296.17</b>

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

Table 13: Summary of Convenience Goods Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
<b>Available Expenditure in Breckland (£m)</b>						
Thetford	98.17	98.77	103.59	106.51	109.60	112.54
Dereham	105.13	105.41	106.56	108.62	110.97	113.22
Swaffham	35.79	36.83	39.84	41.23	42.67	44.02
Watton	23.47	23.67	22.72	23.49	24.29	25.04
Attleborough	34.99	37.68	43.37	45.84	48.26	50.51
Other Breckland	8.23	8.27	7.91	8.11	8.33	8.54
<b>Total</b>	<b>305.79</b>	<b>310.64</b>	<b>323.99</b>	<b>333.80</b>	<b>344.11</b>	<b>353.86</b>
<b>Turnover of Existing Facilities (£m)</b>						
Thetford (1)	83.52	83.52	95.35	95.35	95.35	95.35
Dereham (2)	103.66	103.66	103.66	103.66	103.66	103.66
Swaffham	64.53	64.53	64.53	64.53	64.53	64.53
Watton	19.19	19.19	19.19	19.19	19.19	19.19
Attleborough (3)	25.27	25.27	43.93	43.93	43.93	43.93
Other Breckland	8.23	8.23	8.23	8.23	8.23	8.23
<b>Total</b>	<b>304.40</b>	<b>304.40</b>	<b>334.89</b>	<b>334.89</b>	<b>334.89</b>	<b>334.89</b>
<b>Surplus/Deficit Expenditure (£m)</b>						
Thetford	14.65	15.26	8.25	11.16	14.25	17.19
Dereham	1.47	1.75	2.90	4.96	7.30	9.56
Swaffham	-28.74	-27.70	-24.69	-23.30	-21.86	-20.51
Watton	4.28	4.49	3.53	4.30	5.10	5.85
Attleborough	9.72	12.40	-0.56	1.91	4.32	6.57
Other Breckland	0.00	0.04	-0.32	-0.12	0.10	0.31
<b>Total</b>	<b>1.39</b>	<b>6.24</b>	<b>-10.90</b>	<b>-1.09</b>	<b>9.22</b>	<b>18.97</b>

Source: Tables 5 to 12

Commitments as at April 2018

(1) B&amp;M store (£1.35 million) plus 920 sq.m net @ £11,394 psm at Tulip Viking, Thetford (£10.48 million) added at 2021

(2) Aldi store in Dereham (912 sq.m net convenience sales - £10.54 million) added at 2015

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

Table 14: Convenience Goods Floorspace Expenditure Capacity 2017 to 2036

Centre	2017	2021	2026	2031	2036
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£11,394	£11,394	£11,394	£11,394	£11,394
<b>Floorspace Requirement (sq.m net)</b>					
Thetford	1,339	724	979	1,251	1,509
Dereham	153	254	435	641	839
Swaffham	-2,431	-2,167	-2,045	-1,919	-1,800
Watton	394	310	377	448	514
Attleborough	1,089	-49	167	379	577
Other Breckland	4	-29	-11	9	27
<b>Total</b>	<b>547</b>	<b>-956</b>	<b>-96</b>	<b>809</b>	<b>1,665</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Thetford	1,913	1,034	1,399	1,787	2,155
Dereham	219	363	622	915	1,198
Swaffham	-3,473	-3,095	-2,921	-2,741	-2,571
Watton	563	442	539	639	734
Attleborough	1,555	-70	239	542	824
Other Breckland	5	-41	-15	12	39
<b>Total</b>	<b>782</b>	<b>-1,366</b>	<b>-137</b>	<b>1,155</b>	<b>2,379</b>

Source: Table 13



## **Appendix 2: Comparison Assessment**

**Table 1: Study Area Population**

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

Sources:

*Experian 2011 Census of Population and ONS 2014 Projections***Table 2: Comparison Goods Expenditure per person (£)**

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

Sources:

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

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

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey July 2014

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

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

Source: Tables 3 and 4

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

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

Source: Tables 3 and 4

Table 7: Future Comparison Goods Market Shares (%)

Area	Zone 1 Thetford	Zone 2 Dereham	Zone 3 Swaffham	Zone 4 Watton	Zone 5 Attleborough	Zone 6 SE.Breckland	% Inflow
Thetford	44.0%	0.1%	1.0%	4.0%	13.7%	14.0%	5.0%
Dereham	0.4%	46.8%	17.4%	26.5%	3.5%	0.0%	5.0%
Swaffham	0.3%	0.7%	17.3%	2.5%	0.0%	0.0%	5.0%
Watton	1.1%	0.3%	0.6%	24.4%	1.9%	0.2%	2.0%
Attleborough	0.2%	0.2%	0.0%	0.1%	22.1%	7.6%	5.0%
Other Breckland	0.1%	0.4%	0.3%	0.2%	0.2%	1.5%	2.0%
<b>Breckland District Total</b>	<b>46.1%</b>	<b>48.5%</b>	<b>36.6%</b>	<b>57.7%</b>	<b>41.4%</b>	<b>23.3%</b>	
<b>Outside Breckland DC</b>	<b>53.9%</b>	<b>51.5%</b>	<b>63.4%</b>	<b>42.3%</b>	<b>58.6%</b>	<b>76.7%</b>	<b>n/a</b>
<b>TOTAL</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>n/a</b>

Source: NEMS Household Survey July 2014 with adjustments for commitments

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2021</b>	<b>161.12</b>	<b>153.17</b>	<b>55.16</b>	<b>59.56</b>	<b>76.46</b>	<b>45.18</b>		<b>550.65</b>
Thetford	70.89	0.15	0.55	2.38	10.48	6.32	4.78	95.56
Dereham	0.64	71.68	9.60	15.78	2.68	0.00	5.28	105.67
Swaffham	0.48	1.07	9.54	1.49	0.00	0.00	0.66	13.25
Watton	1.77	0.46	0.33	14.53	1.45	0.09	0.38	19.02
Attleborough	0.32	0.31	0.00	0.06	16.90	3.43	1.11	22.13
Other Breckland	0.16	0.61	0.17	0.12	0.15	0.68	0.04	1.93
<b>Breckland District Total</b>	<b>74.28</b>	<b>74.29</b>	<b>20.19</b>	<b>34.36</b>	<b>31.66</b>	<b>10.53</b>	<b>12.25</b>	<b>257.55</b>
<b>Outside Breckland DC</b>	<b>86.85</b>	<b>78.88</b>	<b>34.97</b>	<b>25.19</b>	<b>44.81</b>	<b>34.65</b>	<b>n/a</b>	<b>305.35</b>
<b>TOTAL</b>	<b>161.12</b>	<b>153.17</b>	<b>55.16</b>	<b>59.56</b>	<b>76.46</b>	<b>45.18</b>	<b>n/a</b>	<b>562.90</b>

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2026</b>	<b>192.53</b>	<b>181.04</b>	<b>66.56</b>	<b>71.64</b>	<b>94.81</b>	<b>53.41</b>		<b>659.99</b>
Thetford	84.71	0.18	0.67	2.87	12.99	7.48	5.73	114.62
Dereham	0.77	84.73	11.58	18.98	3.32	0.00	6.28	125.67
Swaffham	0.58	1.27	11.52	1.79	0.00	0.00	0.80	15.95
Watton	2.12	0.54	0.40	17.48	1.80	0.11	0.46	22.91
Attleborough	0.39	0.36	0.00	0.07	20.95	4.06	1.36	27.19
Other Breckland	0.19	0.72	0.20	0.14	0.19	0.80	0.05	2.30
<b>Breckland District Total</b>	<b>88.76</b>	<b>87.81</b>	<b>24.36</b>	<b>41.33</b>	<b>39.25</b>	<b>12.44</b>	<b>14.68</b>	<b>308.63</b>
<b>Outside Breckland DC</b>	<b>103.77</b>	<b>93.24</b>	<b>42.20</b>	<b>30.30</b>	<b>55.56</b>	<b>40.96</b>	<b>n/a</b>	<b>366.04</b>
<b>TOTAL</b>	<b>192.53</b>	<b>181.04</b>	<b>66.56</b>	<b>71.64</b>	<b>94.81</b>	<b>53.41</b>	<b>n/a</b>	<b>674.67</b>

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2031</b>	<b>230.86</b>	<b>215.08</b>	<b>80.48</b>	<b>86.38</b>	<b>117.19</b>	<b>63.46</b>		<b>793.45</b>
Thetford	101.58	0.22	0.80	3.46	16.06	8.88	6.89	137.89
Dereham	0.92	100.66	14.00	22.89	4.10	0.00	7.50	150.08
Swaffham	0.69	1.51	13.92	2.16	0.00	0.00	0.96	19.24
Watton	2.54	0.65	0.48	21.08	2.23	0.13	0.55	27.65
Attleborough	0.46	0.43	0.00	0.09	25.90	4.82	1.67	33.37
Other Breckland	0.23	0.86	0.24	0.17	0.23	0.95	0.05	2.75
<b>Breckland District Total</b>	<b>106.43</b>	<b>104.31</b>	<b>29.45</b>	<b>49.84</b>	<b>48.52</b>	<b>14.79</b>	<b>17.64</b>	<b>370.98</b>
<b>Outside Breckland DC</b>	<b>124.44</b>	<b>110.77</b>	<b>51.02</b>	<b>36.54</b>	<b>68.67</b>	<b>48.67</b>	<b>n/a</b>	<b>440.11</b>
<b>TOTAL</b>	<b>230.86</b>	<b>215.08</b>	<b>80.48</b>	<b>86.38</b>	<b>117.19</b>	<b>63.46</b>	<b>n/a</b>	<b>811.09</b>

Source: Tables 3 and 7

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

Area	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	% Inflow	Total
<b>Expenditure 2036</b>	<b>275.99</b>	<b>255.04</b>	<b>96.89</b>	<b>103.76</b>	<b>143.70</b>	<b>75.26</b>		<b>950.64</b>
Thetford	121.43	0.26	0.97	4.15	19.69	10.54	8.26	165.30
Dereham	1.10	119.36	16.86	27.50	5.03	0.00	8.94	178.79
Swaffham	0.83	1.79	16.76	2.59	0.00	0.00	1.16	23.13
Watton	3.04	0.77	0.58	25.32	2.73	0.15	0.66	33.25
Attleborough	0.55	0.51	0.00	0.10	31.76	5.72	2.03	40.68
Other Breckland	0.28	1.02	0.29	0.21	0.29	1.13	0.07	3.28
<b>Breckland District Total</b>	<b>127.23</b>	<b>123.69</b>	<b>35.46</b>	<b>59.87</b>	<b>59.49</b>	<b>17.54</b>	<b>21.12</b>	<b>444.41</b>
<b>Outside Breckland DC</b>	<b>148.76</b>	<b>131.35</b>	<b>61.43</b>	<b>43.89</b>	<b>84.21</b>	<b>57.72</b>	<b>n/a</b>	<b>527.36</b>
<b>TOTAL</b>	<b>275.99</b>	<b>255.04</b>	<b>96.89</b>	<b>103.76</b>	<b>143.70</b>	<b>75.26</b>	<b>n/a</b>	<b>971.77</b>

Source: Tables 3 and 7

Table 12: Base Year Comparison Goods Floorspace

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

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

Table 13: Summary of Comparison Goods Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
<b>Available Expenditure (£m)</b>						
Thetford	76.48	79.59	95.56	114.62	137.89	165.30
Dereham	92.93	96.36	105.67	125.67	150.08	178.79
Swaffham	11.65	12.14	13.25	15.95	19.24	23.13
Watton	16.80	17.51	19.02	22.91	27.65	33.25
Attleborough	14.57	15.33	22.13	27.19	33.37	40.68
Other Breckland	1.76	1.83	1.93	2.30	2.75	3.28
<b>Breckland District Total</b>	<b>214.18</b>	<b>222.76</b>	<b>257.55</b>	<b>308.63</b>	<b>370.98</b>	<b>444.41</b>
<b>Turnover of Existing Facilities (£m)</b>						
Thetford (1)	76.48	79.57	106.34	117.41	129.62	143.12
Dereham (2)	92.93	98.28	106.38	117.45	129.68	143.17
Swaffham	11.65	12.12	13.11	14.48	15.99	17.65
Watton	16.80	17.48	18.92	20.88	23.06	25.46
Attleborough (3) (4)	14.57	15.16	24.62	27.18	30.01	33.13
Other Breckland	1.76	1.83	1.98	2.19	2.42	2.67
<b>Breckland District Total</b>	<b>214.18</b>	<b>224.43</b>	<b>271.35</b>	<b>299.59</b>	<b>330.77</b>	<b>365.20</b>
<b>Surplus/Deficit Expenditure (£m)</b>						
Thetford	n/a	0.02	-10.78	-2.78	8.26	22.18
Dereham	n/a	-1.92	-0.71	8.21	20.40	35.61
Swaffham	n/a	0.02	0.13	1.47	3.26	5.48
Watton	n/a	0.04	0.10	2.02	4.59	7.79
Attleborough	n/a	0.17	-2.49	0.01	3.36	7.55
Other Breckland	n/a	-0.01	-0.06	0.11	0.33	0.61
<b>Total</b>	<b>n/a</b>	<b>-1.67</b>	<b>-13.80</b>	<b>9.04</b>	<b>40.20</b>	<b>79.21</b>

Source: Tables 5 to 11

Commitments as at April 2017

(1) B&amp;M store (£6.96 million) plus 2,400 sq.m net @ £5,520 psm at Tulip Viking, Thetford (£13.25 million) added at 2021

(2) Aldi store at Dereham (228 sq.m net - £1.60 million) added at 2017

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

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

Table 14: Comparison Goods Floorspace Expenditure Capacity 2016 to 2036

Centre	2017	2021	2026	2031	2036
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,100	£5,520	£6,095	£6,729	£7,430
<b>Floorspace Requirement (sq.m net)</b>					
Thetford	5	-1,952	-456	1,228	2,985
Dereham	-376	-129	1,347	3,032	4,793
Swaffham	5	24	241	484	737
Watton	8	18	332	682	1,048
Attleborough	33	-451	2	499	1,016
Other Breckland	-1	-10	17	49	82
<b>Total</b>	<b>-327</b>	<b>-2,500</b>	<b>1,483</b>	<b>5,975</b>	<b>10,661</b>
<b>Floorspace Requirement (sq.m gross)</b>					
Thetford	6	-2,603	-609	1,638	3,981
Dereham	-501	-172	1,797	4,043	6,391
Swaffham	6	33	321	645	983
Watton	10	25	442	910	1,397
Attleborough	44	-602	2	666	1,354
Other Breckland	-1	-14	23	65	109
<b>Total</b>	<b>-436</b>	<b>-3,334</b>	<b>1,977</b>	<b>7,966</b>	<b>14,215</b>

Source: Table 13

# **Appendix 3: Food/Beverage Assessment**



**Table 1: Study Area Population**

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

Sources: Experian 2011 Census of Population and ONS 2014 Projections

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

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

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

**Table 3: Total FAB Expenditure (£m)**

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

Source: Tables 1 and 2

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

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

Source: NEMS Household Survey July 2014

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

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

Source: Tables 3 and 4

Table 6: Current 2017 FAB Expenditure (£m)

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

Source: Tables 3 and 4

Table 7: Future 2021 FAB Expenditure (£m)

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

Source: Tables 3 and 4

Table 8: Future 2026 FAB Expenditure (£m)

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

Source: Tables 3 and 4

Table 9: Future 2031 FAB Expenditure (£m)

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

Source: Tables 3 and 4

Table 10: Future 2036 FAB Expenditure (£m)

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

Source: Tables 3 and 4

Table 11: Town Centre Food and Drink Units/Floorspace

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

Source: Breckland Land Use Survey 2014

Table 12: Summary of FAB Expenditure 2015 to 2036

Centre	2015	2017	2021	2026	2031	2036
<b>Available Expenditure (£m)</b>						
Thetford	22.49	23.33	24.94	27.60	30.54	33.69
Dereham	25.22	26.07	27.68	30.39	33.40	36.63
Swaffham	4.52	4.70	5.06	5.65	6.29	6.98
Watton	4.07	4.23	4.53	5.03	5.59	6.18
Attleborough	12.63	13.24	14.46	16.39	18.51	20.77
Other Breckland	11.25	11.69	12.54	13.94	15.48	17.13
<b>Breckland District Total</b>	<b>80.18</b>	<b>83.27</b>	<b>89.21</b>	<b>98.99</b>	<b>109.80</b>	<b>121.37</b>
<b>Turnover of Existing Facilities (£m)</b>						
Thetford (1)	22.49	22.94	25.00	26.28	27.62	29.03
Dereham	25.22	25.73	27.04	28.42	29.87	31.40
Swaffham	4.52	4.61	4.84	5.09	5.35	5.62
Watton	4.07	4.15	4.36	4.58	4.82	5.06
Attleborough	12.63	12.88	13.54	14.23	14.95	15.72
Other Breckland	11.25	11.48	12.06	12.68	13.33	14.01
<b>Breckland District Total</b>	<b>80.18</b>	<b>81.79</b>	<b>86.85</b>	<b>91.28</b>	<b>95.94</b>	<b>100.83</b>
<b>Surplus Expenditure (£m)</b>						
Thetford	n/a	0.39	-0.07	1.32	2.92	4.67
Dereham	n/a	0.34	0.64	1.97	3.53	5.23
Swaffham	n/a	0.09	0.22	0.55	0.94	1.35
Watton	n/a	0.08	0.17	0.45	0.77	1.12
Attleborough	n/a	0.36	0.92	2.17	3.56	5.05
Other Breckland	n/a	0.21	0.48	1.26	2.15	3.12
<b>Total</b>	<b>n/a</b>	<b>1.48</b>	<b>2.36</b>	<b>7.71</b>	<b>13.87</b>	<b>20.54</b>

(1) food and beverage floorspace at Tulip Viking, Thetford (167 sqm gross - £0.89 million) added at 2021

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

Centre	2017	2021	2026	2031	2036
<b>Turnover Density New Floorspace (£ per sq.m)</b>	£5,100	£5,307	£5,578	£5,862	£6,161
<b>Floorspace Requirement (sq.m gross)</b>					
Thetford	76	-13	236	498	757
Dereham	67	120	352	602	849
Swaffham	18	41	99	160	220
Watton	15	32	81	131	181
Attleborough	71	174	388	607	820
Other Breckland	42	90	226	367	506
<b>Total</b>	<b>290</b>	<b>444</b>	<b>1,383</b>	<b>2,365</b>	<b>3,334</b>

Source: Table 12

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