

Breckland Retail and Leisure Capacity Study Final Report

Breckland Council

24 July 2025

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Glossary

Average Daily Rate (ADR)

The average hotel rental revenue earned for an occupied room per day, calculated by dividing room revenue by rooms sold.

Average sales density/turnover density

The annual average level of trade or turnover achieved per square metre of sales floorspace, which is used to measure the relative trading performance of retail outlets.

Benchmark turnover

Expected turnover of existing retail floorspace based on national averages which the identified available expenditure can be measured against.

Class A1

Commercial units/premises previously classed as retail or shop uses, but now part of the new Class E.

Class A2

Commercial units/premises previously classed as financial or professional services, e.g. banks and building societies, but now part of the new Class E.

Class A3

Commercial units/premises previously classed as restaurants and cafés, but now part of the new Class E.

Class A4

Commercial units/premises previously classed as public houses and bars, but now classed as Sui Generis.

Class A5

Commercial units/premises previously classed as hot food takeaway outlets but now classed as Sui Generis.

Class D2

Commercial units/premises previously classed as leisure, sport and recreation uses but now classed as Class E, Class F.1 or Sui Generis.

Convenience goods

Consumer goods purchased on a regular basis e.g. food/groceries and cleaning materials.

Comparison goods

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

Experian

A data consultancy widely used for retail and leisure planning information.

Food and beverage

Former Class A3 food and drink outlets, selling food and drinks consumed away from the home or hot food takeaway food but not food and grocery items including convenience goods.

GlobalData

A market research and data consultancy widely used for retail planning information, previously Verdict Research.

Goad Plans

Town centre plans prepared by Experian, which are based on occupier surveys of over 1,300 town centres across the UK.

Gross floorspace

Total external floorspace including exterior walls.

Market share/Penetration rate

The proportion of total consumer expenditure within a given area taken by a particular town centre, destination or shopping/leisure facility.

Multi-channel shopping

Products made available to consumers on more than one sales channel, such as ecommerce websites, brick-and-mortar stores, marketplaces, comparison shopping engines, social media platforms, and other online channels.

Multiplex cinema

A cinema complex with five or more screens.

Net (sales) floorspace

Retail floorspace devoted to the sale of goods, excluding backstage/storage space and other areas not accessible to customers.

Oxford Retail Consultants (ORC)

A data consultancy widely used for retail planning information.

Revenue per Available Room (RevPAR)

A measure of hotel financial performance, setting out the revenue generated per room irrespective of occupancy levels. RevPAR is calculated by dividing total room revenue (ADR) by total rooms available (occupancy rate).

Special forms of trading (SFT)

Retail sales via the internet, mail order, stalls and markets, door-to-door and telephone sales, including on-line sales by supermarkets, department stores and catalogue companies.

1.0 Introduction

Overview

- 1.1 Lichfields has been commissioned by the Breckland District Council (“the Council”) to prepare a Retail and Leisure Capacity Study. Lichfields prepared the Council’s previous retail study published in December 2014. The analysis in this report will inform the preparation of the Council’s new Local Plan covering the period up to 2042. The study has been prepared to meet the requirements set out in the National Planning Policy Framework (NPPF), the Planning Practice Guidance (PPG)
- 1.2 The Retail and Leisure Capacity Study is a key element of the evidence base supporting the new Local Plan, site allocations and relevant development management policies in the Local Plan. This includes defining the approach to planning for main town centre uses in Breckland; setting targets and thresholds for the provision of new retail floorspace; influencing the type and location of retail and leisure uses; and promoting the vitality and vibrancy of Breckland’s five designated town centres i.e. Attleborough, Dereham, Swaffham, Thetford and Watton.
- 1.3 The study includes an assessment of the following:
- The composition and operation of the retail and leisure stock within the District’s towns and summarising current provision and trends.
 - The capacity of the District’s shopping centres to absorb competition from competing centres and out-of-centre developments, without experiencing significant adverse effects on trading patterns and their vibrancy and vitality.
 - The effect of extended permitted development rights as afforded by changes to the Use Class Order on the District’s town centres.
 - Analysis of the business needs of the operators and proprietors of main town centre uses and the shopping habits and preferences of their customers.
 - Consideration of broader trends and external influences on consumer behaviour, spending, and footfall, including land use, accessibility, and quality of the environment.
 - The need to provide additional floorspace for retail and leisure uses within Breckland in the short, medium and long term, accounting for patterns of growth and investment, vacant stock and the future requirements for retail and other town centre uses.
 - Assessment of future requirements or demand for hotel development within the District.
 - Policy-based recommendations drawing on evidence relating to the allocation of sites for future development; the strategic policy approach to retail and leisure development in Breckland, including the designation of shopping areas and frontages, and as well as restrictions to permitted land uses.

Report Structure

- 1.4 Section 2 of this report provides a summary of current national planning policies and changes to the Use Classes Order introduced in September 2020.
- 1.5 Section 3 provides an overview of trends and recent changes that will affect the demand for retail and other relevant town centre uses. The appropriate policy and strategy approach for Breckland should reflect these underlying trends.
- 1.6 Section 4 examines the existing hierarchy of centres within the District and the surrounding area. Appendix 2 provides more detailed centre health checks and audits for the five main designated centres in the District, as follows:
 - 1 Attleborough
 - 2 Dereham
 - 3 Swaffham
 - 4 Thetford
 - 5 Watton.
- 1.7 Sections 5 to 9 provide town centre health checks for the five designated centres in the District.
- 1.8 Section 10 sets out the retail and food/beverage floorspace capacity assessment based on the latest available Experian expenditure and sales density projections. The capacity tables are shown in Appendix 2, 3 and 4.
- 1.9 Section 11 provides an assessment of other main town centre uses including the scope for leisure, entertainment and cultural uses.
- 1.10 Section 12 reviews potential implications for future development plan policy taking account of updated floorspace capacity projections and recent changes to the Use Classes Order (UCO) and permitted development rights (PDR).
- 1.11 Section 13 summarises the main conclusions and recommendations.

2.0 National Planning Policy

National Planning Policy Framework

- 2.1 The recent updated version (December 2024) of the National Planning Policy Framework (NPPF) remains unchanged in relation to the vitality of town centres. Paragraph 90 indicates planning policies should:
- define a network and hierarchy of town centres and promote their long-term vitality and viability - by allowing them to grow and diversify in a way that can respond to rapid changes in the retail and leisure industries, allows a suitable mix of uses (including housing) and reflects their distinctive characters;
 - define the extent of town centres and primary shopping areas, and make clear the range of uses permitted in such locations, as part of a positive strategy for the future of each centre;
 - retain and enhance existing markets and, where appropriate, re-introduce or create new ones;
 - allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, looking at least ten years ahead. Meeting anticipated needs for retail, leisure, office and other main town centre uses over this period should not be compromised by limited site availability, so town centre boundaries should be kept under review where necessary;
 - where suitable and viable town centre sites are not available for main town centre uses, allocate appropriate edge of centre sites that are well connected to the town centre. If sufficient edge of centre sites cannot be identified, policies should explain how identified needs can be met in other accessible locations that are well connected to the town centre; and
 - recognise that residential development often plays an important role in ensuring the vitality of centres and encourage residential development on appropriate sites.
- 2.2 The rapid changes that are affecting the retail sector and town centres continue to be acknowledged and reflected in the latest NPPF. It recognises that diversification is key to the long-term vitality and viability of town centres, to 'respond to rapid changes in the retail and leisure industries'. Accordingly, planning policies should clarify 'the range of uses permitted in such locations, as part of a positive strategy for the future of each centre'.
- 2.3 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. Covid-19 and the cost-of-living crisis has elevated this debate. On-line shopping has grown faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a broader mix of uses within town centre will become increasingly important i.e. leisure and services as well as retail. It is widely recognised that a broader mix of uses can extend activity throughout the daytime and into the evenings.

Changes to the Use Classes Order

- 2.4 In September 2020, the UCO was significantly amended. Changes to town centre use classes now allow far greater flexibility for uses to change within town centres without the need to obtain planning permission. The UCO has significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses and retain specific uses previously protected e.g. Class A1 retail.
- 2.5 In relation to main town centre uses, as defined in the NPPF Annex 2 glossary, the UCO changes provide for three new use classes:
- Class E (Commercial, business and service);
 - Class F.1 (Learning and non-residential institutions); and
 - Class F.2 (Local community).
- 2.6 The UCO changes now combine: Shops (A1), financial/professional services (A2), cafés/restaurants (A3), indoor sports/fitness (D2 part), medical health facilities (D1 part), creche/nurseries and office/business uses (B1) into the new single Use Class E. Class E includes some uses that are not defined as 'main town centre uses' within the NPPF e.g. medical services and some light industrial uses.
- 2.7 Other changes potentially introduce more restrictions rather than flexibility. Partly in response to the impact of the Covid-19 crisis, there is added protection against the loss of learning, non-residential and community facilities, including museums, public halls, sports facilities and local shops. These uses are now included in new Classes F.1 and F.2. Class F.2 also includes small, isolated shops (at least 1 kilometre from a similar shop) selling essential goods including food.
- 2.8 Other potential non-retail town centre uses have been placed in the list of Sui Generis uses, with no permitted changes of use e.g. pubs/bars (A4), takeaways (A5), cinemas and live music venues. The inclusion of these uses as Sui Generis appears to have a dual function i.e. controlling uses such as pub/bars and takeaways that may have an impact on nearby residential amenity, whilst protecting against the loss of other cultural facilities such as cinemas and music venues, most vulnerable to the impacts of Covid-19.
- 2.9 The previous distinction between Class A3, A4 and A5 uses has become more critical, with Class A3 uses now having more flexibility in the new Class E, but no flexibility for Class A4 and A5 uses. Many Class A3 restaurants offered a takeaway service during the Covid-19 crisis and the categorisation of bar/restaurants has always been arguable and will be a matter of fact and degree on a case-by-case basis. In response to these changes, future land use surveys should categorise uses within centres and frontages to reflect the new UCO, which is helpful when considering appropriate policy options and change of use planning applications.
- 2.10 The potential implications of permitted changes in use outside town centres may also have unintended consequences. In theory large out-of-centre B1 office buildings or D2 commercial leisure uses, with no restrictive conditions, could be converted to retail use without planning permission or an assessment of the impact on the town centre or application of the sequential test. Allowing retail uses to occupy out-of-centre buildings could run counter to the objective of maintaining and enhancing town centres. This change

could have implications for the effectiveness of retail impact and sequential test policies. However, to date there is limited evidence either nationally or locally that there has been an upturn in out-of-centre retail uses occupying employment or leisure buildings.

- 2.11 In December 2020, the Government began a consultation on a variety of further changes to permitted development rights relating to housing delivery and public service infrastructure. The consultation included a proposed Class E to Class C3 permitted development right. The outcome of several elements of this were published and the associated amendments to the Town and Country Planning (General Permitted Development) (England) Order 2015 (GPDO) which were laid before Parliament in the Town and Country Planning (General Permitted Development etc.) (England) (Amendment) Order 2021. The Government published an amendment to the General Permitted Development Order in March 2024.
- 2.12 A new Class MA business and commercial to residential permitted development right has introduced certain commercial to residential permitted development (PD) rights. The new class MA is different to previous retail and office to residential PD rights, with several different limitations and conditions. Delivering housing and the reuse of redundant shopping space is the Government's priority and the Class MA permitted development right emphasises this.
- 2.13 The new permitted development rights effectively reduce the scope of office to residential permitted development while increasing the scope of retail to residential and introduce new PD rights for other town centre uses to change to residential. The impact of these PD rights on the number of occupied retail premises in town centres is unclear at this stage, but generally the proportion of retail units have been falling over the past decade.
- 2.14 Class MA allows many properties within Class E to change to residential without consideration of impact on the high street where the proposal is outside of a conservation area and limited consideration if it is within a conservation area. The impact on the character and sustainability of the conservation area needs to be considered for ground floor proposals. There may also be restrictive planning conditions or legal agreements that prevent change of use via Class MA.
- 2.15 Only listed buildings and their curtilage and properties in the most sensitive locations such as World Heritage Sites and Areas of Outstanding National Beauty are excluded from the new PD right. The legislation requires assessment of loss of retail and office in beautiful and heritage locations, but in no other retail or business destinations. The retail assessment required by the previous Class MA PD right falls away.
- 2.16 Subject to limitations and conditions, former uses classes Class A1 (shops); Class A2 (financial and professional services); Class A3 (food and drink); Class B1 (business); Class D1(a) (non-residential institutions – medical or health services); Class D1(b) (non-residential institutions – crèche, day nursery or day centre) and Class D2(e) (assembly and leisure – indoor and outdoor sports), other than use as an indoor swimming pool or skating rink, now benefit from the Class MA PD rights. The changes introduced in March 2024 for Class MA remove the requirement that a building must have been vacant for a continuous period of at least 3 months immediately prior to the date of an application for prior approval. Additionally, Class MA is amended to remove the floorspace upper limit for buildings changing use under the right.

- 2.17 In a conservation area and where the change of use is at ground floor level, the impact on the character and sustainability of the conservation area is another new prior approval matter. Addressing this matter could potentially include a limited assessment of retail impact.
- 2.18 The requirement to meet space standards in relevant prior approval applications came into force in April 2021. The GPDO does not grant permission for any dwelling that would be less than 37 sq.m or would not comply with the nationally described space standard. These measures have raised concerns about the potential impact on high streets and shopping parades, which are essential to support local communities.
- 2.19 Many Local Authorities have introduced Article 4 Directions as a mechanism to protect town centres, by removing some of the PD rights. These Article 4 Directions are usually focused on a specific area rather than across the entire town centres.

3.0

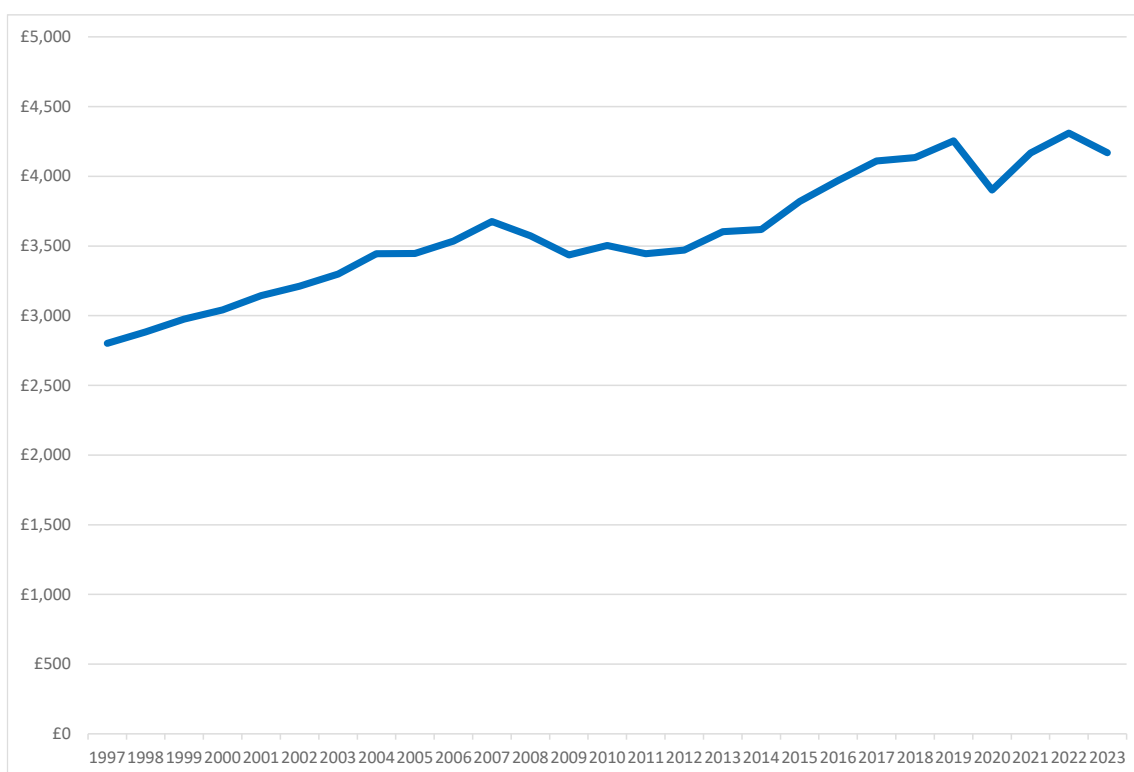
Trends and recent changes

National trends

3.1

Historic trends indicate that consumer expenditure has grown consistently in real terms, generally following a cyclical growth trend. The growth in expenditure per person on comparison retail goods between 1997 and 2023 is shown in Figure 2.1. High growth between 1997 and 2008 fuelled demand for new retail floorspace. Since the recession and credit crunch in 2009 expenditure growth has been much slower and the demand for retail floorspace has reduced, particularly comparison goods floorspace. Comparison goods expenditure per capita dropped sharply in 2020 due to the impact of Covid-19 lockdowns, but expenditure recovered to pre-Covid levels in 2022. However, expenditure per person declined in 2023 due to the on-going cost-of-living and energy crisis.

Figure 3.1 UK growth in comparison goods expenditure per head (2022 prices)



Source: Experian Retail Planner Briefing Note 22 (March 2025) – Appendix 4b.

3.2

The main implications of Brexit, Covid-19, high inflation, the cost-of-living and energy crisis for evidence base studies were as follows:

- impact on the reliability of demographic and economic projections i.e., population growth and Experian expenditure forecasts;
- short term impacts on the mix of uses and customer behaviour that distorted levels of expenditure during 2020, 2021 and 2022; and
- longer-term structural impacts that could affect the nature of town centres and the way households shop, eat/drink out and participate in leisure activities.

- 3.3 The key on-going uncertainties relating to the first two points are primarily the length of the cost-of-living crisis and the potential implications of trade tariffs and other geopolitical issues. The longer-term structural implications are harder to predict and quantify at this stage, but recent data provides an early indication.
- 3.4 Operators have continued to face elevated risks to cashflow and increased costs arising from a slump in consumer demand and disruption to supply chains. Non-essential products, hospitality and leisure services were the hardest hit during the Covid-19 crisis. Short-term supply chain disruption led to inflationary pressure, which had an impact of consumer demand.
- 3.5 Retailers with infrastructure to fulfil on-line orders/home delivery benefitted during the Covid-19 crisis. There has been a structural shift towards multi-channel shopping (home, TV and internet shopping), reducing the demand for physical space within town centres.
- 3.6 As a result of these trends, there has been a spike in town centre vacancies with many businesses failing, particularly non-food retail operators, restaurants and leisure uses. High levels of inflation and the cost-of-living crisis exacerbated difficult trading conditions. Many national operators have announced job losses and store closures.
- 3.7 Reflecting these trends, Experian's latest forecasts (published in March 2025) suggest slower expenditure growth and home shopping/internet spending is expected to grow at a much faster rate than traditional bricks and mortar shopping.

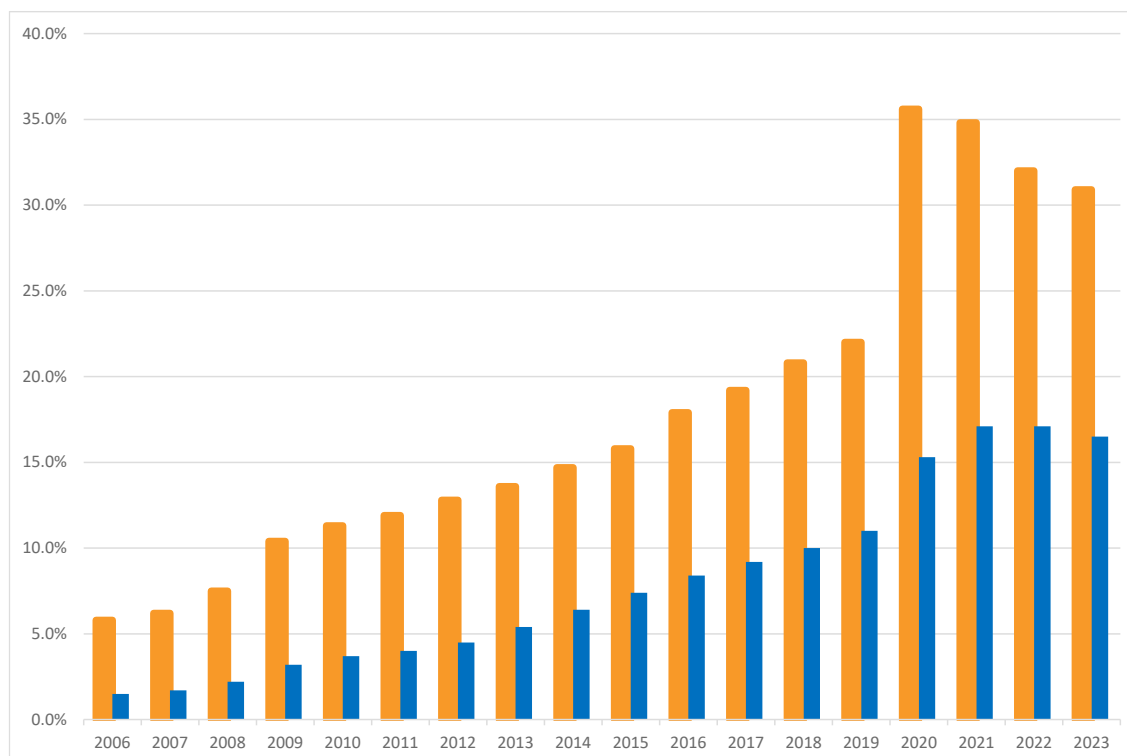
Experian's latest retail expenditure forecasts

- 3.8 This study adopts Experian latest expenditure information and forecasts (Retail Planning Briefing Note 22 – March 2025). The study sets out expenditure projections during five-year intervals up to 2046.
- 3.9 The current cost-of-living crisis, including the high level of inflation, resulted in a reduction in retail expenditure per person during 2023, with many customers either trading down (buying cheaper products or using discount retailers) or cutting back (buying less products). Experian indicates a continued decline during 2024 and 2025. Low growth is predicted during 2026, but higher annual growth is expected in the longer-term.
- 3.10 Planning based on long-term expenditure growth projections up to and beyond ten years has always had inherent uncertainties. Despite these uncertainties, development plans should assume a return to reasonable rates of growth and relative normality, although the implications of the short-term impacts should not be ignored. It is better to plan for a return to growth and then modify the strategy later if levels of growth are lower than originally predicted, rather than not planning for growth because there are significant uncertainties. The latter approach is likely to fail to respond in time if higher levels of growth are achieved, and any growth will go elsewhere. Nevertheless, a cautious approach to expenditure growth, as now suggested by Experian, should be adopted, bearing in mind the uncertainties relating to the growth in on-line shopping.
- 3.11 For convenience goods, Experian's latest forecasts suggest a continued period of readjustment following high growth in expenditure experienced during the Covid-19 lockdowns in 2020. Convenience goods expenditure per capita is expected to continue to fall during 2025 and 2026. In the longer-term a small decline is forecast at -0.3% per

annum between 2027 to 2031 and -0.2% per annum thereafter. Despite this forecast reduction in total expenditure per capita, Experian expects continued growth in non-store sales. Any need for new convenience goods retail floorspace in the District is likely to relate to population growth, high current levels of trading or qualitative areas of deficiency.

- 3.12 Comparison goods expenditure per head is predicted to fall by -1% during 2024 but will increase marginally by 1.4% during 2025 and 2026. Modest growth is expected in the longer-term (between 2.5% to 3.6% per annum), but still at a lower rate than previous historic trends (8% per annum between 1997 and 2007). Historically comparison goods expenditure has grown significantly more than convenience goods expenditure, and Experian's latest national growth rate recommendations are consistent with these past trends.
- 3.13 New forms of retailing (multi-channel and home shopping) have and will continue to grow. Home/electronic shopping and home delivery has increased with the growth in the use of personal computers, smart phones and the internet. Click and collect / click and return shopping has become more popular. Recent trends suggest continued steady growth in multi-channel activity.
- 3.14 Experian's Retail Planner Briefing Note 22 (March 2025) suggests non-store retailing's market share increased from 17.8% in 2019 to 27.7% in 2021. Non-store sales include all on-line sales and other forms of sales not generated from physical retail floorspace e.g. vending machines, party plan and deliveries. Comparison non-store sales increased from 22% to 34.8% and convenience good sales increased from 11% to 17.1% between 2019 and 2021. However, Experian indicates comparison goods non-store sales figure fell during the post Covid lockdown period in 2022 and 2023, reducing from 34.8% to 30.9%. Convenience goods non-store sales also fell to 16.5%. Nevertheless, the 2023 figures remain significantly higher than the pre-Covid market shares in 2019. The growth in non-store retail sales for comparison and convenience goods between 2006 and 2022 in the UK is shown in Figure 3.2.
- 3.15 Between 2006 and 2023 the proportion of comparison goods non-store sales increased by over 25 percentage points from 5.8% to 30.9%. The proportion of convenience goods non-store sales increased by 15 percentage points but increased by over ten times, starting from a lower 2006 base of only 1.5%. Experian data shows the sharp increase in non-store sales during the Covid lockdowns during 2020 and 2021, but a decline in 2022 and 2023.
- 3.16 This data suggests the proportion of retail sales spent on-line will continue to grow, which will have an impact on traditional bricks and mortar retailing. Conversely the introduction of return fees for on-line shopping and increased minimum spend thresholds for free deliveries may benefit traditional retailing.
- 3.17 Reflecting these trends, Experian's latest projections recommend relatively modest levels of growth in on-line shopping when compared with previous trends. It is too early to plan for a significant shift towards on-line shopping, over and above the levels of growth already predicted by Experian, but a higher shift to on-line shopping is possible. These longer-term forecasts should be monitored and kept under review.

Figure 3.2 Non-store sales as a percentage of total sales in the UK



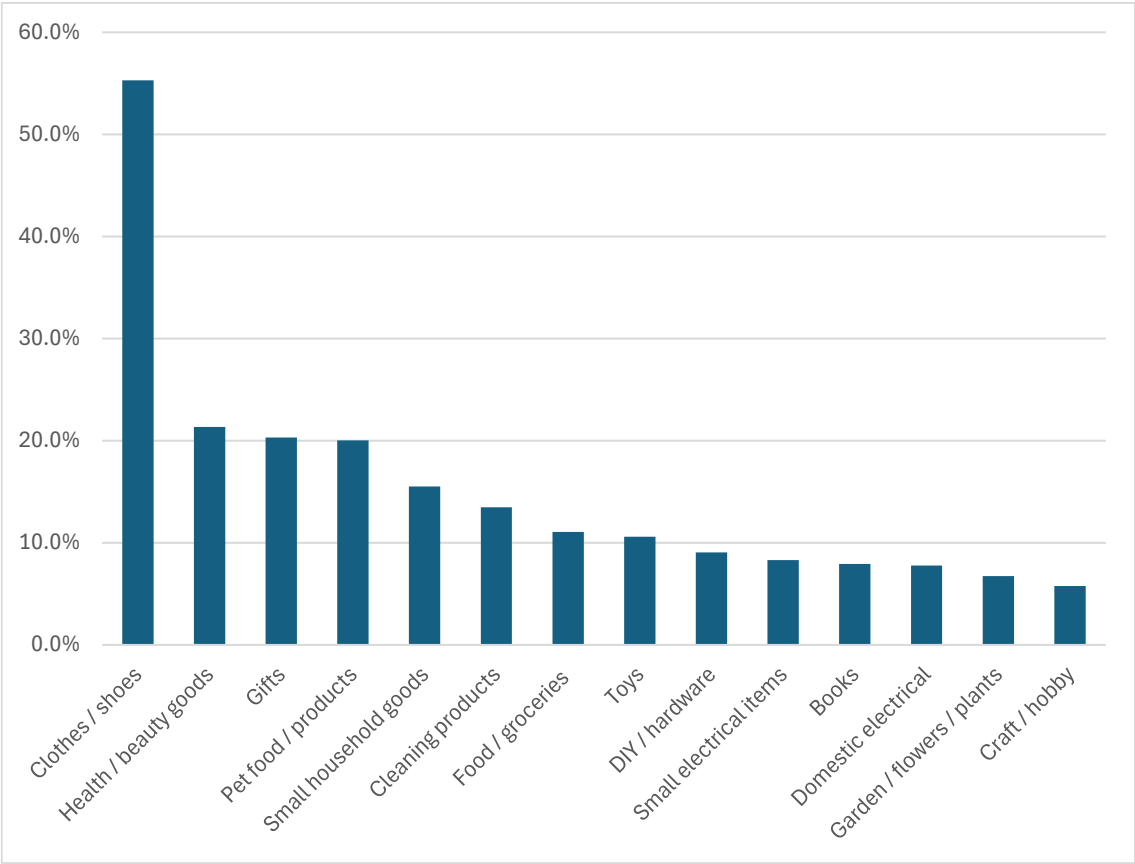
Source: Experian Retail Planner Briefing Note 22 (March 2025) – Appendix 3

- 3.18 The floorspace capacity assessment in this study makes an allowance for future growth in e-tailing based on Experian's latest projections. Given the likelihood that multi-channel expenditure will continue to grow at a faster pace than other consumer expenditure, the need assessment adopts relatively cautious growth projections for expenditure and an allowance is made for operators to increase their turnover/sales density, due to growth in home shopping and click and collect.

Shopping behaviour in Breckland

- 3.19 The household survey results for 809 completed interviews during March 2025 across the Breckland study area as shown in Appendix 1, indicate many households regularly buy items from the internet for home delivery. The survey results suggest 35.9% of respondents do most of their household's non-food shopping on-line and 11.5% of households did their last main food and grocery shop via the internet/delivery.
- 3.20 The products most regularly purchased by households online are shown in Figure 3.3. The survey results indicate that a broad range of non-food goods are purchased online, with clothing /shoes and health/beauty items are most often purchased online.

Figure 3.3 Items most (top three) regularly purchased via the internet (% of all households)



Source: NEMS household shopper survey March 2025 (weighted results).

Mode of travel

- 3.21

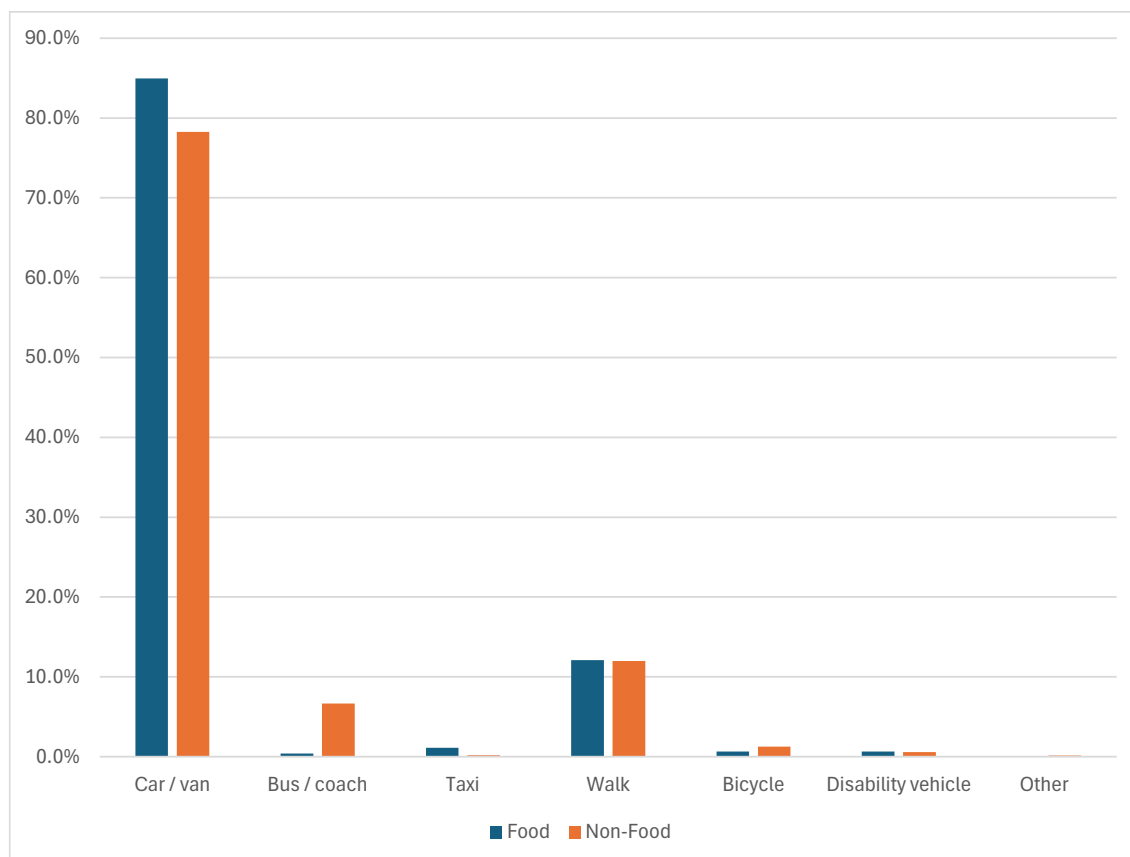
As indicated above, 35.9.% of respondents reported doing most of their non-food shopping online and 11.5% of respondents did their last main food shop online, with Tesco and Sainsbury’s being the most used operators for food and grocery deliveries. Experian suggests 26.6% of retail sales will be via non-store activity in 2025. The figures suggest many households do not need to travel to undertake food and non-food shopping.
- 3.22

Despite the increasing proportion of households shopping via the internet, the majority continue to travel to shopping destinations by car. The results for food and non-food shopping (excluding internet/home shopping) are shown in Figure 3.4.
- 3.23

Shopping by car as the driver is the most popular mode of travel for both non-food and main food shopping trips. Relatively low proportions of customers walk or travel by public transport to shop for both food and non-food shopping.
- 3.24

Car usage is generally higher for the main food shopping trip than for non-food shopping trips because many households still undertake bulk food and grocery shopping once a week or less often. Non-food shopping trips are generally undertaken less frequently. Bus travel is higher for non-food shopping.

Figure 3.4 Mode of travel for non-food and food shopping (% of travelling household respondents)



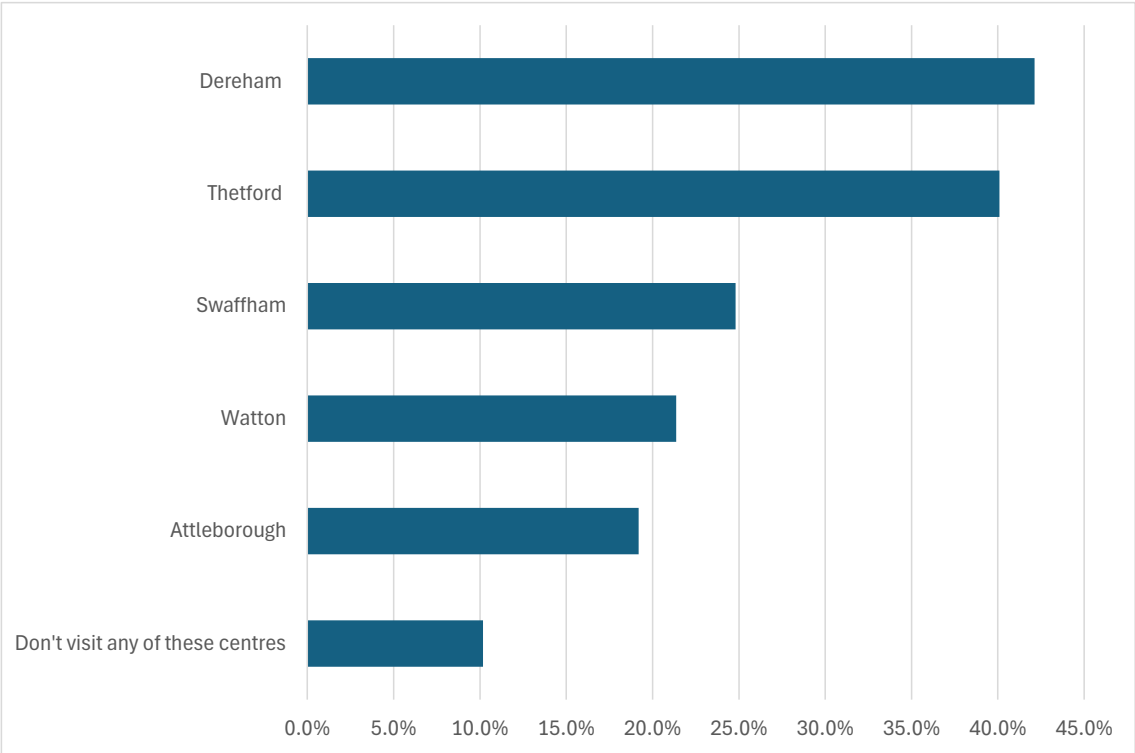
Source: NEMS household shopper survey March 2025 (weighted results).

- 3.25 Car travel for food and non-food shopping was relatively high across all zones but are highest in Zone 3 – Swaffham and lowest in Zone 2 – Dereham where levels of access to shopping facilities are higher on foot and by bus. Based on Lichfields' recent experience, car usage for shopping is generally lower within predominantly urban areas and higher in rural areas i.e. normally below 70% of households for main weekly shopping in urban areas and over 85% in rural areas.

Activities undertaken by visitors to Breckland's centres

- 3.26 Respondents to the household survey were asked if they had visited the main centres in the District during the daytime or evenings to use the shops, services or leisure facilities in the last year. Dereham and Thetford were the main destinations visited by households in the study area, as shown in Figure 3.5, followed by Swaffham. Only 10.2% of households had not visited any of the main centres in Breckland during the last year, mostly households in the zones that extend beyond the District boundary. The results indicate many households had visited more than one centre in Breckland.

Figure 3.5 Breckland’s main centres visited by households during the last year (% of all study area households)



Source: NEMS household shopper survey March 2025 (weighted results).

- 3.27 The variety of activities carried out by visitors to the five main centres is shown in Table 3.1. The results indicate that most households undertake multiple activities in Breckland’s five town centres. The pattern of activities is broadly similar in all five centres but there are some small variations.
- 3.28 Shopping is the main activity in all five town centres. Non-food/window shopping is the most popular activity in the two largest centres in Dereham and Thetford. The three other smaller centres have more limited, albeit important roles for non-food shopping. Food shopping is a key activity in all five main centres, but to a lesser extent in Watton. The market in Swaffham appears to be particularly popular with visitors.
- 3.29 Visiting cafés, pubs and restaurants is significant in all five centres with between 23.5% to 27% of visitors undertaking this activity. Leisure activities are less significant ranging from only 3.1% to 16.9% of visitors. Dereham and Thetford are the main destination for leisure activities.
- 3.30 These results indicate that shopping remains an important activity to all five centre’s overall vitality and viability, but a good range of leisure and non-retail services is important to their overall attraction.

Table 3.1 Activities carried out by visitors to each centre (% of all visitors to each centre)

Activity	Attleborough	Dereham	Swaffham	Thetford	Watton	Average all centres
Shopping						
Non-food shopping	40.6	58.8	41.3	61.7	42.7	49.0
Food shopping	55.4	51.5	45.6	44.5	38.3	47.1
Window shop/ browse	13.6	17.0	15.5	16.8	12.8	15.1
Visting the market	0.0	4.3	25.2	2.5	3.0	7.0
Click and collect	0.0	0.0	0.0	0.9	0.0	0.2
Leisure						
Go for a walk	4.2	5.6	3.9	11.3	7.4	6.5
Café /pub/ restaurant	24.0	23.5	27.0	24.6	24.5	24.7
Leisure activity	4.5	12.9	3.1	16.9	8.4	9.2
Other services						
Banks / financial	3.2	12.4	5.4	9.1	8.7	7.8
Health facilities	12.8	10.0	6.9	9.4	7.8	9.4
Library	1.3	2.5	0.2	3.1	2.2	1.9
Post office	4.6	7.4	6.6	1.4	8.5	5.7
Buying fuel	2.7	5.6	1.5	2.6	3.6	3.2
Other service uses	5.7	9.6	6.7	6.8	3.0	6.4
Other activities						
Travelling to / from work	8.6	5.2	5.0	4.3	10.2	6.7
Education / school run	4.4	2.6	2.0	1.7	2.4	2.6
Visting family / friends	17.9	10.0	14.8	18.7	23.6	17.0

Source: Breckland NEMS household shopper survey January 2025 (weighted results).

Demand for town centre uses

- 3.31 Lower expenditure growth and deflationary pressures (i.e., price cutting) in the non-food sector had an impact on the high street in the past 20 years. Because of these trends, the UK average shop vacancy rate (based on Goad Plan data) increased from around 10% in 2005 to about 14% in 2012. Vacancy rates gradually improved to 11.8% in 2018 but has increased to 14.8% in March 2025. There was a sharp increase in shop vacancies in many town centres due to the impacts of Covid-19 and the growth in on-line shopping.
- 3.32 The Council's land use information in May 2025 indicates that there were 92 vacant units in the five town centres. The overall vacancy rate in these centres was 14.2% of all shop units. This vacancy rate is similar to the UK average. However, Thetford has a relatively high vacancy rate of 23.5%, with Attleborough, Swaffham, and Watton below the UK average and Dereham broadly in line with the UK average.
- 3.33 The distribution of vacant units and vacancy rates are set out in Table 3.3.

Table 3.2 Vacant shop units in Breckland District's town centres

Town centre	Number of vacant units	% of all units
Attleborough	10	9.8
Dereham	29	14.9
Swaffham	9	8.0
Thetford	36	23.5
Watton	8	9.0
Total	92	14.2

Source: Breckland District land use survey 2025.

- 3.34 The underlying increase in vacant units across the UK described earlier is primarily due to the reduction of comparison goods retail outlets. Breckland's five town centres have comparable levels of comparison provision to the UK average, indicating consistency with this trend. In some centres, non-retail services have helped to replace some of the vacated comparison goods retail outlets. Breckland has above-average provision of non-retail services, which may have prevented a further increased in shop vacancy rate. A more detailed analysis of the mix of uses in the District town centres compared with the national picture is set out in the centre health checks in Sections 5 to 9.
- 3.35 Property owners, landlords and fund managers have come under increasing pressure with struggling occupiers seeking to renegotiate terms through company voluntary arrangement (CVA) i.e., an insolvency process designed to let a firm with debt problems reach an agreement with creditors to help pay off part or all debts. Retailers have been continuing to 'right size' their portfolios, with many operators announcing store closures. These trends have impacted on rental income and the capital value of retail/ leisure property assets. These trends have been exacerbated by the cost-of-living crisis and are expected to continue at least in the short-term.
- 3.36 Whilst the CVA process has created difficulties for landlords in terms of rent negotiations, at the same time newly freed-up space has provided new opportunities. Vacated premises have been reconfigured and reused for non-retail uses i.e. food/beverage and leisure uses e.g. trampolines, escape rooms, climbing and indoor golf.

Food store operators

- 3.37 In addition to new forms of retailing, retail operators have responded to changes in customers' requirements. Retailers have also changed their trading formats to include smaller convenience store formats capable of being accommodated within town and local centres (such as the Tesco Express/ Metro, Sainsbury's Local, Little Waitrose and Marks & Spencer's Simply Food formats).
- 3.38 Across the UK the number of Tesco Express, Sainsbury's Local and Little Waitrose stores increased significantly during the last decade. The number of Tesco Express stores increased by 35%, from 1,427 stores in 2012 to 1,920 stores in 2020 (source: Mintel). During the same period Sainsbury's Local stores increased by 83% and the number of Little Waitrose stores doubled. The number of Asda Express and Morrisons Daily stores has also

increased. This trend is less evident in Breckland, with most centres served by small convenience stores e.g. Tesco Express in Thetford, Co-op stores in Dereham and Morrisons Daily in Swaffham. There are additional local convenience stores in the form of newsagents / independent stores.

- 3.39 There has been a move away from larger food superstores to smaller formats, reflecting changes in some customers' shopping habits i.e. more frequent but smaller food and grocery shopping trips rather than bulk food shopping. This trend increased with more homeworking during the pandemic lockdowns, which may not return to pre-Covid levels in the future.
- 3.40 The rapid expansion of European discount food operators Aldi and Lidl has continued. These discount operators are now competing more directly for market share with other main food store operators. This trend is evident in Breckland with Lidl stores in Attleborough, Dereham, Thetford and Watton and Aldi stores in Dereham and Thetford. Home Bargains and B&M have also expanded rapidly in recent years and are represented in Thetford.
- 3.41 The number of small independent food and grocery shops in town centres declined over many years, as the number of large food stores increased. In the last decade this trend slowed and has to some extent reversed with some customers preferring to visit specialist shops e.g. butchers, bakers and greengrocers. There is reasonable representation of these specialists in the District, particularly in Watton, Thetford and Dereham.

Comparison retailers

- 3.42 Comparison retailers have responded to difficult market conditions during the on-going cost-of-living crisis. The bulky goods warehouse sector (i.e. DIY, furniture, floor coverings and electrical goods) has rationalised, including mergers and failures, and scaled down store sizes. Other traditional high street retailers previously sought large out-of-centre stores, for example Next, TK Maxx and M&S. Matalan also opened numerous discount clothing stores across the UK. Sports clothing retail warehouses including Decathlon and Sports Direct had expanded out-of-centre. These trends have slowed significantly, and in some cases reversed, and are unlikely to re-emerge for the foreseeable future.
- 3.43 The demand for premises from the bulky goods sector, i.e. furniture, carpets, electrical and DIY, has been particularly weak in recent years. The difficulties recently experienced by Homebase is an example of this trend. This trend has led to voids on some retail warehouse parks and proposals to extend the range of goods sold to non-bulky comparison goods. This downward trend in bulky goods stores has also led to the relocation of retailers to out-of-centre locations, creating more vacant units in town centres. The discount sector has occupied many units on retail parks e.g. Home Bargains, Poundland and B&M Bargains. There is good representation of retail warehouse operators in the District at Forest Retail Park / London Road and Lime Kiln Lane in Thetford and East Dereham.
- 3.44 Within centres, many high street multiple comparison retailers have changed their format. For over two decades, high street national multiples have increasingly sought larger modern shop units (over 200 sq.m) with an increasing polarisation into the larger regional and sub-regional centres. Many multiple retailers now require representation in fewer locations to service catchment areas. This trend is evident in most centres in the East of

England/East Midlands, where the focus of comparison goods national multiples is in Bury St Edmunds, Cambridge, Ipswich, Norwich and Peterborough District. Dereham and Thetford a more limited range and choice of national multiples.

3.45 In general, operator demand for space has decreased significantly during the last five years and, of those national multiples looking for space, many prefer to locate in larger sub-regional and regional centres e.g. Norwich and Bury St Edmunds. Dereham and Thetford are at a lower level in the shopping hierarchy, with other town centres in the District at the lower levels in the hierarchy where multiple operator demand will continue to be limited in the future. Polarisation of investment in the larger centres is likely to continue, with many retailers reducing their overall number of outlets. Dereham and Thetford have the best prospects for attracting multiple retailers but could lose existing operators if consolidation into the largest regional centres continues.

3.46 The continuation of these trends will influence future operator space requirements in the District with smaller vacant units and lower tier centres continuing to be less attractive for new multiple occupiers, and retailers increasingly looking to locate into larger units in larger centres. However, smaller vacant units could still be attractive to independent traders and non-retail services looking to serve local catchment areas.

Charity and discount shops

3.47 The charity shop sector has grown steadily over the past 30 years and there is no sign this trend will change soon. This trend has raised concerns in some areas regarding over concentrations of charity shops at the expense of other retail uses. Nevertheless, these outlets do provide an important role in offering affordable goods and a service to those wanting to recycle goods.

3.48 Planning policies cannot control the amount of charity shops because they fall within the same use class as other shops (now Class E). In many centres, charity shops have occupied vacated shop premises during previous recessions. This trend is evident in Breckland, with charity and second-hand shops making up 22.0% of comparison goods units on average, higher than the UK average of 9.7%. Watton has the highest proportion at 30.4%, with Attleborough (23.8%), Thetford (23.3%), Dereham (19.9%) and Swaffham (15.6%) having above average proportions of charity shops.

3.49 Charity shops can often afford higher rents than small independent occupiers because of business rate discounts. It does not follow that these charity shops will be replaced by traditional shops when the market recovers.

Non-retail services

3.50 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. The non-retail service uses include the following Class E and Sui Generis uses:

- hairdressers, dry cleaners, travel agents, some sandwich shops (those not categorised as hot food takeaways), funeral parlours and post offices;
- banks, building societies, financial services, betting offices, pawnbrokers, estate agents and employment agencies;

- restaurants, cafés and hot food takeaways; and
- pubs/bars.

- 3.51 The number of bank/building society outlets has decreased significantly during the last two decades, with banks looking to reduce costs and the increase in on-line banking. Nationally, the proportion of town centre units occupied by banks/building societies was 4.6% of all units in 2005. This proportion had reduced to 2.8% in 2017 and was only 1.8% in 2024. Santander has recently announced the closure of 95 branches, reduced opening hours across the UK with a shift to online banking. Lloyds bank announce 136 branch closures in January 2025.
- 3.52 Many smaller town centres now have no remaining banks/building societies. The 2025 land use surveys indicate there are only 23 banks in the five town centres. Across the UK banks/building societies tend to concentrate their outlets in the largest centres in local areas. This trend is evident in Breckland, where Dereham has 13 banks/building societies and Thetford has 3.
- 3.53 Banking hubs have emerged and enable major banks to maintain a high street presence whilst reducing costs, with different banks sharing the same unit and operating on different days. The first banking hub in the District opened in Watton in 2024, and may extend to other centres in the future. Continued rationalisation of bank and financial services could lead to an increase in town centre vacancies.
- 3.54 The growth of money lending/pay day loan shops, betting shops and hot food takeaways has raised concerns amongst many local planning authorities and has resulted in a change to permitted development rights (PDR) to control the growth of these uses in town centres. However, these growth trends are not particularly evident in Breckland.
- 3.55 There were only 7 betting shops in the five town centres surveyed in 2025, accounting for 2.6% of all units, below the UK average of about 3.5%. There are no obvious over-concentrations of betting shops in the District's centres, with the exception of Thetford where the three betting shops present account for 6% of all units.
- 3.56 There were 39 hot food takeaways in the five town centres, 6.0% of all units, which is below the UK national average of 6.4%. Watton had the highest concentration of hot food takeaways, with 7 outlets (7.9% of all units). Attleborough also has a high concentration of hot food takeaways; it has 8 outlets, 7.8% of all units. All other centres had between 6 and 11 outlets and were proportionally below the UK average.
- 3.57 Changes to the GPDO has had an impact on some town centres but the more recent changes to the Use Classes Order (UCO) and permitted development rights (PDR) are likely to lead to more significant changes in the future. These measures allow for much greater flexibility for changes of use from retail to non-retail uses. To date, these measures have not significantly changed the composition of most town centres, which may have been suppressed by the Covid pandemic. The impact of these changes will need to be carefully monitored by undertaking regular centre land uses surveys. The cost-of-living crisis may increase demand for change from retail to other uses.

The evening economy

- 3.58 Food/beverage, leisure and entertainment are fast moving and creative sectors, with a steady flow of new concepts emerging. Within these sectors there has been a significant increase in the number of national multiple chains which have sought to increase their geographical coverage, but primarily in larger centres.
- 3.59 The hospitality sector has experienced difficulties resulting in closures, which suggests operators may have over-stretched. Demand continued to increase for coffee shops, such as Starbucks, Costa Coffee and Café Nero. National branded pub/restaurant chains invested heavily and not exclusively in larger centres. Themed restaurants also expanded rapidly but have experienced difficulties more recently. This hospitality sector in town centres has been the most adversely affected by the Covid-19 crisis.
- 3.60 Restaurants, cafés, sandwich bars and coffee shops are now in the new Use Class E, whilst pubs/bars and hot-food takeaways. In terms of how customers use food and beverage outlets the key categories are:
- *Impulse*: characterised by their produce range that is typically highly visual and hand-held so that it can be eaten "on the go";
 - *Speed eating fast food*: food that can be purchased and consumed quickly, therefore price is low and ambience is less important. This sector is dominated by traditional high volume fast food offers such as burgers and fried chicken;
 - *Refuel and relax*: a drink, snack and a short break in a pleasant environment rather than focusing on eating a main meal; and
 - *Casual dining/leisure dining*: incorporating several food styles, types and ethnic origins. The ambience and environment of casual dining is as important as the food, drink and service provided. The style is informal but is normally table service.
- 3.61 The proportion of non-retail uses within town centres across the UK increased significantly before the Covid-19 crisis. This trend was evident in the District, and this sector appears to have to some extent recovered following the Covid crisis.
- 3.62 There were 127 food/beverage outlets in the five town centres in the District, 19.6% of all units, which is below the UK average of 22.9%. Breckland's main centres have a slightly lower than average provision of restaurants/cafés, with 68 units accounting for 10.5% of all units, compared with the UK average of 11.2%. Three of the five town centres have above-average provision, Attleborough and Thetford having the highest representation (12.7% and 11.8%), and Dereham has the lowest proportion at 8.2%. The provision of hot food takeaways (39 outlets – 6.0%) is below the UK average (6.4%), with above-average provision only in Attleborough and Watton (7.8% and 7.9%).
- 3.63 There were 20 pubs/bars (3.1% of all units), which is below the UK average (5.2%). The number of pubs/bars is relatively low in all Breckland's main centres, with the exception of Swaffham (5.4%). Overall, the evening economy of Breckland's centres is focused on restaurants/cafés, with strong representation in this sector.

Pop-up spaces

- 3.64 The increase in vacant space across the UK has led to an increase in premises available for temporary uses or pop-up uses including temporary restaurants, bars, shops and galleries. Some landlords have opted for flexible leases, with changing attitudes towards short-term spaces. New independent brands have benefitted despite the lack of brand recognition. E-commerce brands have also sought physical presence, as an essential part of their marketing strategy and an effective way to engage with existing and new customers off-line. Brands have opened pop-up outlets in different locations to test and learn before committing to permanent stores. This trend may increase during the cost-of-living crisis, but this is not particularly evident in Breckland.

Summary

- 3.65 The trends and changes highlighted in this section, including the growth of home shopping, are not new and have been affecting the high street for many years. In response to these trends, most town centres have changed and diversified. The food/beverage, leisure and non-retail service sectors have to some extent been successful in occupying space no longer attractive to retail tenants. The higher proportion of cafés/restaurants in the District coupled with a below average vacancy rate suggests that this trend has been successful in Breckland, except for Thetford which has a particularly high vacancy rate (23.5%). The expansion of the evening economy to increase the provision of restaurants, pubs, bars and other leisure uses may be a good opportunity to reduce vacancies across the District.
- 3.66 There have been cyclical trends in vacancy rates reflecting the macro-economic trends, but in most cases, centres recovered during periods of stronger growth. Many commentators believe the most recent decline is structural rather than cyclical and a more flexible approach to town centre uses is required.
- 3.67 The most recent trends suggest vacancy rates have been slow to recover in weaker centres, and many high street retailers are still experiencing difficulties. The Goad national shop vacancy rate has increased to over 14% and therefore a cautious approach to future development needs is required. The implications of the cost-of-living crisis also endorse a cautious approach to providing additional retail floorspace, particularly in out-of-centre locations.
- 3.68 These national trends have been evident in District's centres but the health check assessments in Sections 5 to 9 suggest resilience in most of Breckland's centres. One positive sign is the low shop vacancy rates in the District, which are generally below the UK average, apart from Thetford (23.5%) and Dereham (14.9%). An analysis of the mix of uses and the role of centres in Breckland is set out in Section 4.0.
- 3.69 Shopping behaviour will continue to change, and town centres will need to respond. All centres will need to focus on their advantages over other forms of multi-channel shopping, for example using the internet as an extended shop window, click and collect facilities and providing a combined retail, leisure and cultural experience for those looking for a "day out" or "evening out".

4.0 Hierarchy of centres

National policy

- 4.1 The NPPF (paragraph 90) indicates planning policies should define a network and hierarchy of town centres and promote their long-term vitality and viability by allowing them to grow and diversify. Town centres as defined in the NPPF comprise a range of locations where main town centre uses are concentrated, including city and town centres, district and local centres. Local centres exclude small parades of shops of purely neighbourhood significance. The NPPF and PPG provide limited guidance on how to categorise town, district and local centres.

Designated centres in Breckland

- 4.2 The adopted Breckland Local Plan (September 2023) identifies three categories of town centres in Policy EC 05 (Town Centre and Retail Strategy). The current hierarchy of town centres is as follows:

Key Centre

- Thetford

Main Centre

- Dereham

Medium Town Centres

- Attleborough
- Swaffham
- Watton

- 4.3 The Local Plan indicates these town centres will be the main focus for retail and leisure development. New development is expected to be proportionate with the position of the centre in the retail hierarchy. Policy GEN 03 (Settlement Hierarchy) identifies Attleborough and Thetford as Key Settlements. Dereham, Swaffham and Watton are identified as Market Towns. This policy also identifies 18 Local Service Centres and 18 Villages with Boundaries.
- 4.4 Thetford is identified as the key centre for development and change. Dereham is the main administrative centre serving a wide hinterland in mid Norfolk. The remaining town centres in Attleborough, Swaffham and Watton and lower tier centres at the same level in terms of range, scale and nature of retail service facilities.
- 4.5 Local Services Centres are expected to meet five criteria by providing public transport access, community facilities (e.g. village hall, public houses, restaurant or café), shop/post office, employment uses and a school. Villages are expected to provide three of the five criteria.
- 4.6 The number of retail, food/beverage and non-retail service outlets in each of the five town centres is shown in Table 4.1. Dereham is the largest centre with a good choice of retail outlets, food/ beverage and service uses. Thetford is the next largest centre followed by Swaffham and Attleborough. Watton is the smallest of the five town centres.

Table 4.1 Designated centres in Breckland District – number of outlets by use

Town centres	Total units	Comparison goods retail	Convenience goods retail	Food/ beverage	Other services*	Vacant units
Thetford	153	30	14	27	46	36
Dereham	194	58	10	32	65	29
Swaffham	112	32	10	25	36	9
Attleborough	102	21	12	24	38	10
Watton	89	23	12	19	27	8
Total	650	164	58	127	212	92
% all units	100.0	25.1	8.9	19.4	32.5	14.1

Source: Breckland District Council land use surveys 2024 and 2025

* excluding Class B, office, Class D1/D2 and residential uses.

- 4.7 The household survey results also shed light on the position of each centre in the hierarchy. Respondents were asked at which location they buy most of their household's non-food shopping. Respondents were also asked which of the town centres in the District they had visited to use shops, services and leisure facilities in the last year, and the results are shown in Table 4.2.

Table 4.2 Destinations used by households (% of all respondents in the study area)

Centre / destination	Visited during the last year	Main non-food shopping destination
Dereham town centre	42.1	10.4
Dereham out-of-centre	n/a	2.9
Thetford town centre	40.1	5.5
Thetford out-of-centre	n/a	8.2
Swaffham	24.8	1.4
Attleborough	19.2	2.2
Watton	21.4	2.4

Source: Breckland NEMS household shopper survey March 2025 (weighted results)

- 4.8 Dereham and Thetford are the main non-food shopping destination in the District. Out of centre retail facilities in Thetford including Breckland Retail Park, Forest Retail Park and the Tesco Extra superstore are major non-food shopping destinations.
- 4.9 The proportion of all respondents in the study area who do most of their non-food shopping at other centres in the District is very low (ranging from 1.4% to 2.4%), which reflects their size, limited number of comparison goods shops and limited importance in the wider hierarchy. A high proportion (35.9%) of respondents do most of their non-food shopping via the internet/delivery. Many non-food destinations located outside Breckland were mentioned by respondents, including Norwich (14.4%), Bury St Edmunds (5.3%) and Kings Lynn (3.3%)
- 4.10 The retail and food/beverage capacity assessment set out in Section 4 and in Appendix 2, 3 and 4 estimates the turnover of each town centre in 2025, as summarised in Table 4.3.

Table 4.3 Combined turnover of the destinations in Breckland District – £million 2025

	Total turnover	Comparison goods retail	Convenience goods retail	Food/ beverage	Leisure/ entertainment
Thetford	320.25	132.76	127.23	52.25	8.01
Dereham	310.49	112.54	138.94	48.52	10.49
Swaffham	70.30	17.23	43.46	8.29	1.32
Watton	95.83	31.56	53.58	6.95	3.74
Attleborough	85.41	19.54	46.92	16.52	2.43

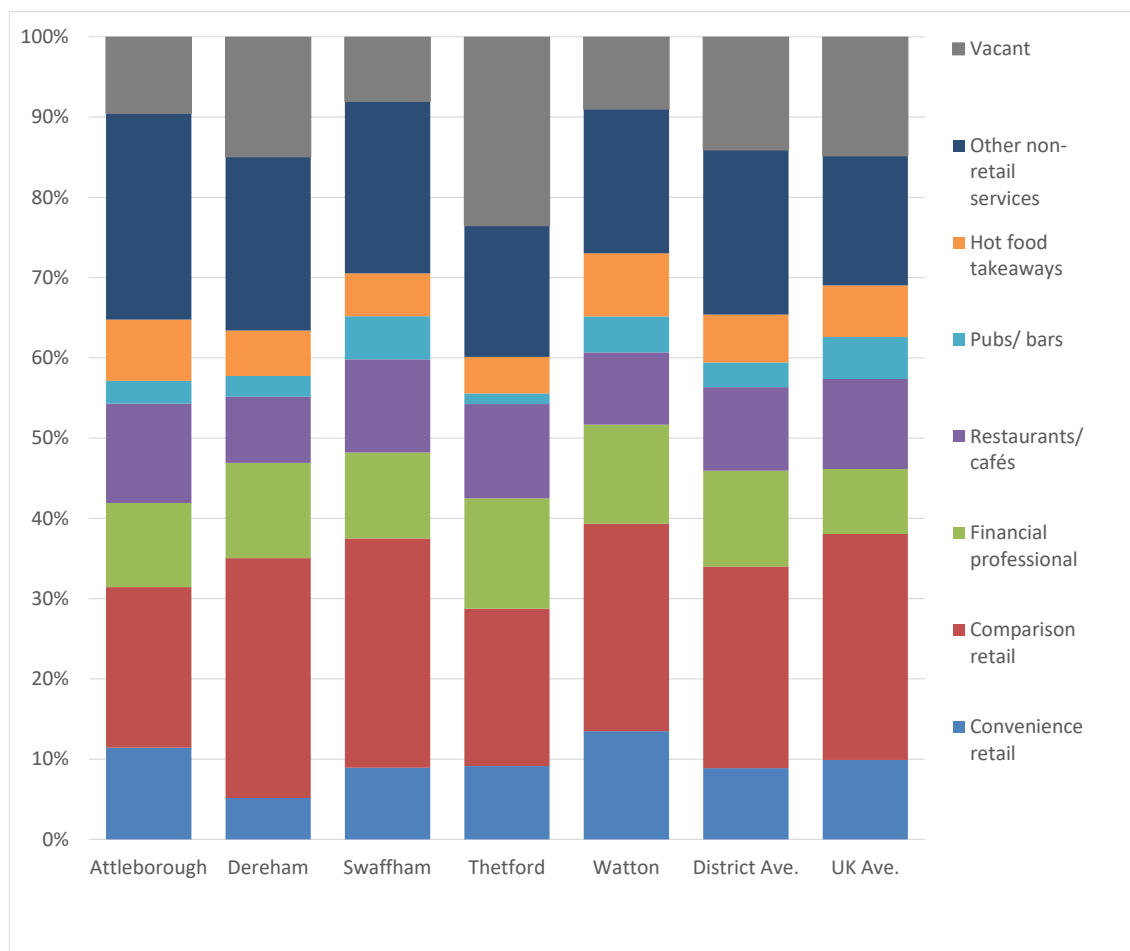
Source: Table 5 in Appendix 2, 3 and 4.

- 4.11 The designation of Thetford and Dereham as the Key and Main Centres is consistent with their size in terms of number of units (over 150 in total) and their combined retail, food/beverage and leisure turnover (over £300 million), when compared with Attleborough, Swaffham and Watton. Attleborough, Swaffham and Watton have a similar number of units and similar turnovers ranging from £70 million to £96 million.

Diversity of main town centre uses

- 4.12 Figure 4.1, overleaf, shows the composition of the five town centres in terms of the mix and proportion of different uses i.e. the proportion of shop units within each use class. This is compared with the average for the six centres and the Goad Plan average for centres across the UK. More detail is provided in the health check analysis in Sections 5 to 9.
- 4.13 All centres have a reasonable mix of retail and service uses. The overall mix of use in the District's town centres is broadly in line with the UK average, but there are some variations. The shop vacancy rate is similar to the national average except a higher vacancy rate in Thetford and a lower rate in Swaffham and Watton.
- 4.14 All centres, with the exception of Dereham and Watton, have a relatively high proportion of café/restaurants and other non-retail services when compared with the national average, but the provision of pubs/bars and hot-food takeaways is below average. Thetford has relatively low proportions of convenience and comparison goods retail. Comparison goods retail provision is above average in Dereham and Swaffham, but is below average in the other centres. Convenience goods retail provision, in terms of the proportion of all units, is below the UK average in three of the centres, namely Dereham, Swaffham and Thetford. It is above average in Watton and Attleborough.

Figure 4.1 Mix of retail and service uses - % of all units



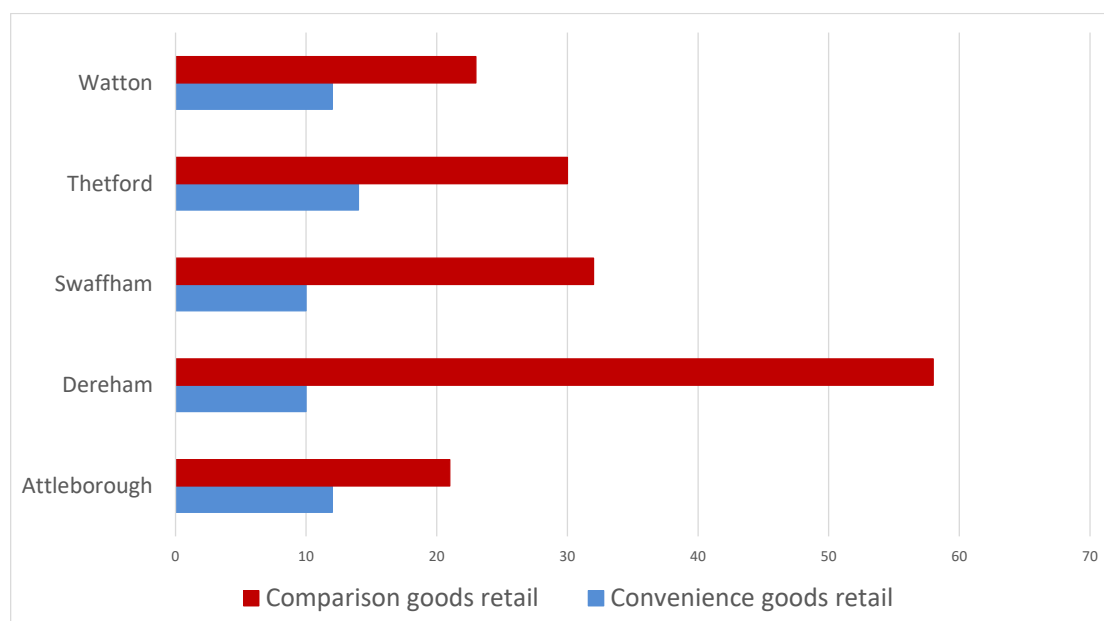
Source: Breckland District Council land use survey 2024 and Experian Goad Plan UK averages.

Retailer representation

4.15

Figure 4.2 compares the proportion of convenience and comparison retail units within centres. Most of the District's comparison and convenience goods retail outlets are focused in Thetford and Dereham. These larger centres tend to have a stronger focus on fashion shopping and therefore have a higher proportion of comparison shops. The other smaller centres tend to have a higher proportion of non-retail services, catering for the day-to-day needs of their local catchment area. Convenience goods retail and non-retail services perform an important role in all centres, serving relatively localised needs. A more detailed analysis of the mix of retail uses in each centre is shown in the centre health checks in the Appendices.

Figure 4.2 Comparison and convenience goods retail outlets (number of units)



Source: Breckland District Council land use survey 2025.

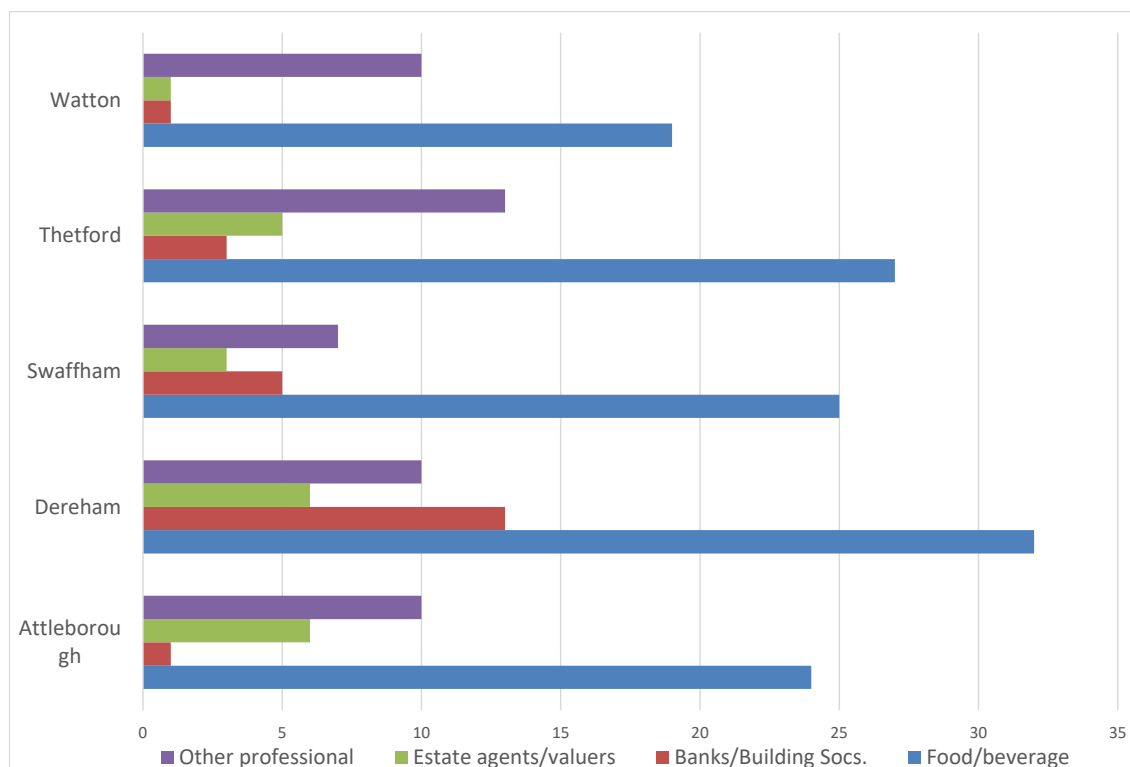
Service Uses

4.16 Service uses perform an important role in the overall offer of a centre and encourage customers to shop locally. Figure 4.3 below summarises the number of outlets in different service categories in the main centres. The service uses are categorised as follows:

- financial and professional services including banks, building societies, financial services, estate agents and employment agencies;
- food/beverage uses including restaurants, cafés, pubs, bars and hot food takeaways; and
- other non-retail services including a wide range of uses, such as hairdressers, dry-cleaners, travel agents, beauty salons and post offices.

4.17 Dereham and Thetford have the highest number of food/beverage outlets, particularly restaurants/cafés. The other centres have a relatively strong provision of hairdressers/beauty salons and estate agents. The provision of banks/building societies is concentrated in Dereham, consistent with the national trend where banks/building societies tend to concentrate their outlets in the largest centres in local areas. A more detailed analysis of the mix of services uses in each centre is shown in the centre health checks in the Appendices.

Figure 4.3 Distribution of non-retail service uses (number of outlets)



Source: Breckland District Council land use survey 2025.

Summary

4.18

The analysis of the hierarchy of centres in this section indicates the District has a well-established network of centres that serve their respective areas. Thetford and Dereham are the main shopping, food/beverage and leisure destinations. Shop vacancy rates are generally below or in-line with the national average, but Thetford has the highest shop vacancy rate, above the UK average. Identifying the hierarchy of centres in future development plans will be important in terms of:

- ensuring the vitality and viability of centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable and complementary role and strategy for each centre, recognising their different strengths and potential.

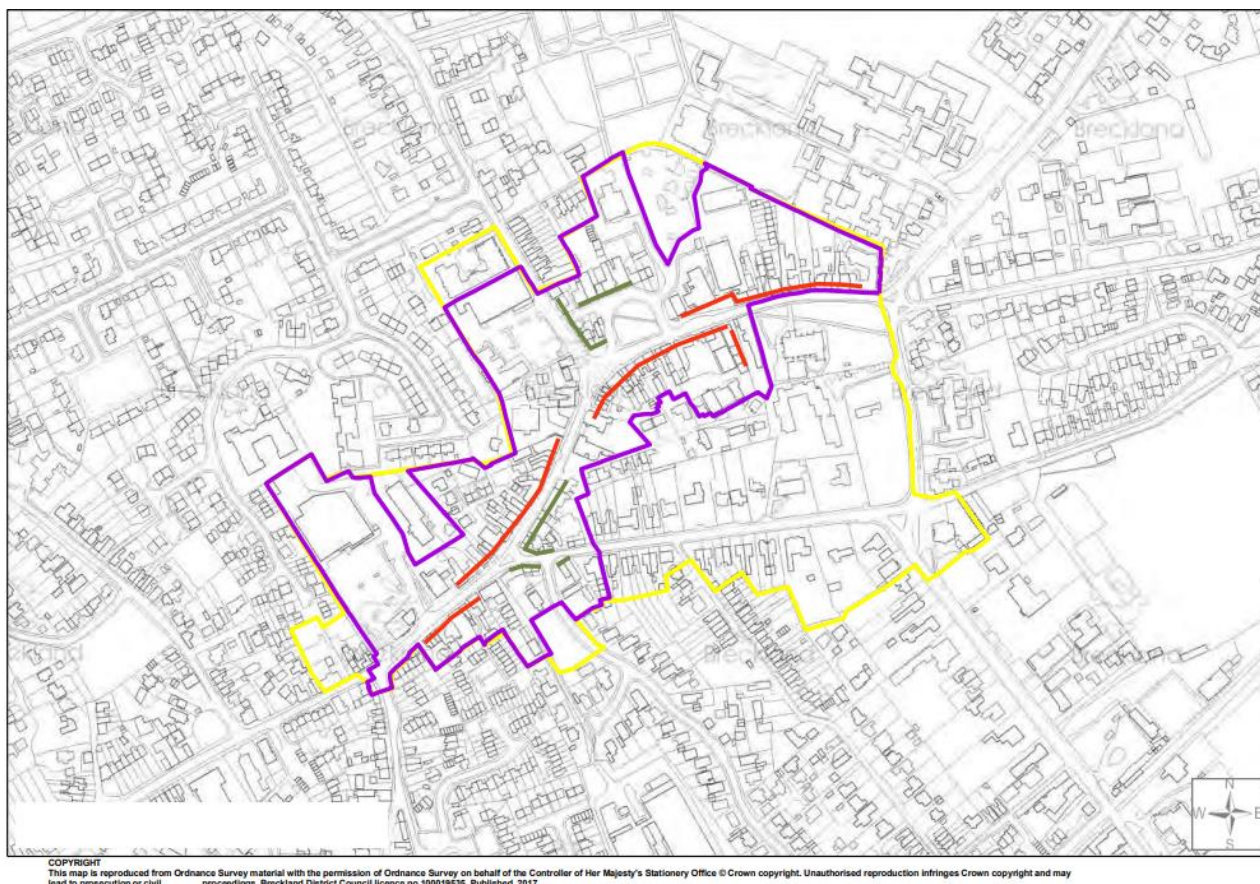
4.19

The network of centres should be protected and enhanced to ensure appropriate accessibility to important facilities for all sections of the community and to ensure sustainable shopping and leisure patterns. The implications of these factors for future policy and strategy are addressed in later sections of this report.

5.0 Attleborough town centre

- 5.1 Attleborough is in the southeast of the District and is designated a 'Medium Town Centre' in the adopted Breckland Local Plan. It is a third-tier centre below Thetford and Dereham. The designated town centre boundary in the adopted local plan is defined by the yellow line in Figure 5.1. The primary shopping area (PSA) is defined by the purple line.

Figure 5.1 Attleborough town centre boundary and frontages



Source: Adopted Breckland Local Plan

Mix of uses and vacancies

- 5.2 Attleborough has 105 retail and service units, the second lowest of the five town centres in Breckland. The mix of uses is set out in Table 5.1, which is compared to the District and UK averages. There were 10 vacant units in October 2024, a vacancy rate of 9.5%, below both the District and UK averages. This suggests that the supply of shop premises is slightly below operator demand. The Breckland Retail Study 2014 indicated a lower vacancy rate (2.9%) significantly below the national average (12.1%) at that time. The more recent higher vacancy rate suggests the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table 5.1 Mix of retail and service uses - Attleborough

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	12	11.4	8.9	9.9
Comparison retail	21	20.0	25.1	28.2
Financial/professional	11	10.5	11.9	8.1
Restaurants/cafés	13	12.4	10.4	11.2
Pubs/bars	3	2.9	3.1	5.2
Hot food takeaways	8	7.6	6.0	6.4
Other non-retail services	27	25.7	20.5	16.2
Vacant	10	9.5	14.1	14.8
Total	105	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025

- 5.3 The composition mix of uses in Attleborough is similar to the District average, which has a number of notable differences to the UK average. Attleborough's proportion of comparison retail units is below both averages while the proportion of convenience retail units is higher than both the UK and District averages with Sainsbury's and Lidl stores anchoring the town centre. Attleborough has a lower proportions of pubs/bars than the UK average. Over a quarter of Attleborough's units are other non-retail services, much higher than the national and District averages. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables 5.2 and 5.3.
- 5.4 Table 5.2 shows Attleborough has 21 comparison goods outlets, which is the fourth lowest in the District, compared with 58, 32 and 30 outlets in Dereham, Swaffham, and Thetford, respectively. The number of comparison goods outlets has reduced by 10 units from 31 in 2014. The centre has 10 of the 14 Goad Plan comparison shop categories represented and the choice of outlets in most categories is reasonable. Absent categories are cars/ motorcycles/ accessories; florists, nurserymen/ seedsman, china/ glass/ gifts, DIY/ hardware/ homewares and jewellers.
- 5.5 The choice of outlets in the represented categories is generally limited with less than three of each outlet. However, Attleborough has a reasonable choice of charity/second-hand shops.
- 5.6 Attleborough has a reasonable selection of non-retail services (62 units) as shown in Table 5.3, the third highest in the District. The number of service outlets has increased by 8 units up from 54 in 2014. There are no travel agents. Consistent with other main centres in the District, there is a strong representation of restaurants/cafés, but much lower representations of pubs/bars. Attleborough has a broad variety of estate agents/valuers and hairdressers/beauty parlours.

Table 5.2 Mix of comparison goods retail uses – Attleborough

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	1	4.8	8.5	21.4
Furniture, carpets and textiles	2	9.5	6.7	7.3
Books, art, cards and stationers	2	9.5	7.9	6.3
Electrical, music and photography	1	4.8	7.3	9.4
DIY, hardware and homeware	0	0.0	3.0	7.0
China, glass and gifts	0	0.0	4.3	5.8
Cars, motorcycles and accessories	0	0.0	0.6	1.3
Chemists, drugstores and opticians	3	14.3	14.0	12.1
Variety, department and catalogue	2	9.5	4.9	1.3
Florists, nurserymen and seedsmen	0	0.0	2.4	2.0
Toys, hobby, cycle and sports	2	9.5	5.5	5.4
Jewellers	1	4.8	4.3	5.4
Charity and second-hand shops	5	23.8	22.0	9.7
Other comparison goods retailers	2	9.5	8.5	5.6
Total	21	100.0	100.0	100.0

%Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2024.

%

Table 5.3 Mix of non-retail service uses – Attleborough

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	13	25.5	24.9	26.1
Hot food takeaway	8	15.7	14.3	15.0
Public house / bar	3	5.9	7.3	12.2
Bank / other financial service	1	2.0	8.4	6.7
Betting shop / casino / amusement	1	2.0	2.6	3.5
Estate agent / valuer	6	11.8	9.2	6.9
Travel agent	0	0.0	1.8	1.3
Hairdresser / beauty parlour	18	35.3	31.1	26.8
Launderette / dry cleaner	1	2.0	0.4	1.5
Sub-total	51	100.0	100.0	100.0
Other non-retail services	11			
Total	62			

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2024

5.7

Other non-retail service uses in Attleborough include fitness studios, funeral directors, charity offices and key cutting shops. Attleborough also has a community hall, a Post Office, a library, places of worship, educational and play/gym facilities. The variety of uses reflects Attleborough's dual shopping and day-to-day service role.

- 5.8 Attleborough has a low number of national/regional multiples, indicative of its position as a third-tier centre in the District's hierarchy. Outlets in the centre are primarily small independent traders. The national multiple retailer and food/beverage outlets, shown in Table 5.4.

Table 5.4 Multiple retailers – Attleborough

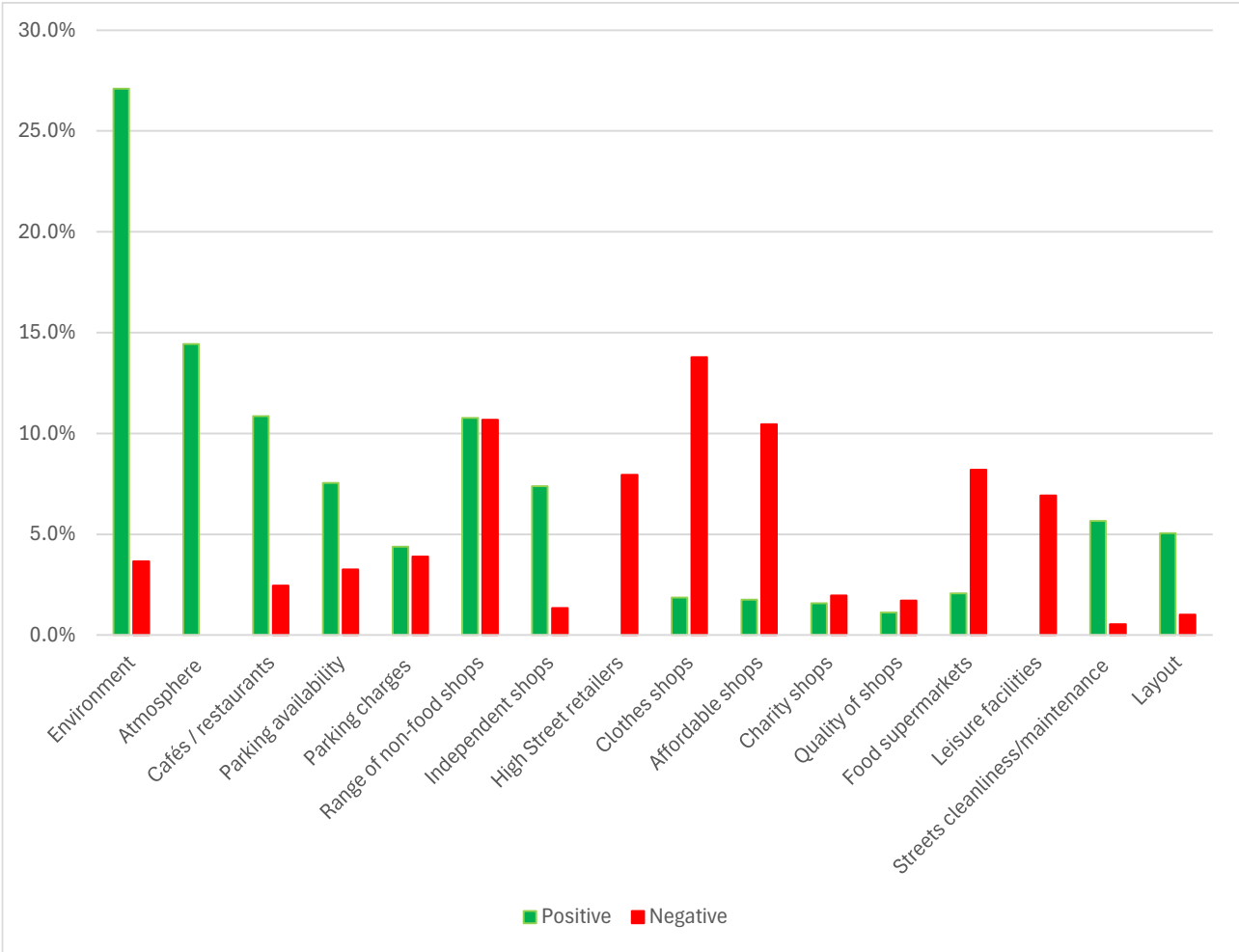
Comparison retail	Convenience retail	Food and beverage
QD	Lidl	Domino's Pizza
The Original Factory Shop	Sainsbury's	

Source: Breckland District Council land use survey 2024

Customer views

- 5.9 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Attleborough in the last year. Just over 19% of respondents in the study area had visited Attleborough, the lowest of the five centres in the District. Of those who had used shops/services in Attleborough, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Attleborough town centre and the negative factors where improvements were suggested are summarised and compared in Figure 5.2 below.
- 5.10 Compared with other centres in Breckland, there were lower proportions of negative views about Attleborough, suggesting lower levels of customer dissatisfaction. There were higher levels of satisfaction relating to the quality of environment, atmosphere and street cleanliness/maintenance in the town centre and availability of cafés/restaurants, independent shops and car parking spaces. The proximity of the centre to home (not included in graph above) was a positive factor (11.4%).
- 5.11 There were higher levels of dissatisfaction relating to the availability of clothing shops, high street retailers, affordable shops, food supermarkets and leisure facilities. In terms of improvements, 8.9% of respondents suggested less traffic congestion/improve access. There were mixed or limited views in relation to other factors such as car parking charges.
- 5.12 Overall, taking all aspects that attracted over 5% of comments, seven aspects were viewed more positively, with four viewed negatively. These results indicate generally positive or mixed views about Attleborough town centre.

Figure 5.2 Positive and negative factors mentioned by visitors about Attleborough (% of all visitors)



Source: NEMS household survey (March 2025).

Customer activities and catchment area

- 5.13 The household survey results indicate only 19.2% of study area respondents had visited shops, services or leisure facilities in Attleborough during the last year, which was significantly lower than Dereham (42.1%) and Thetford (40.1%) but comparable to Watton (21%) and slightly lower than Swaffham (24.8%). Most of these visitors to Attleborough (72%) live in the local area, in Zone 5.
- 5.14 Only 2.2% of households in the study area indicated that they do most of their non-food shopping in Attleborough, which is much lower than Dereham and Thetford. In the local zone 12.6% of households do most of their non-food shopping in Attleborough and the main other destinations in this local zone were Norwich (22%) and Diss (7%).
- 5.15 The breakdown of activities undertaken by visitors to Attleborough is shown and compared with the District average in Table 5.5. The survey results indicate that Attleborough is a reasonably strong retail destination, particularly food shopping. Lower proportions undertake leisure activities in the centre, although cafés/pubs/restaurant and other non-retail services are key activities.

Table 5.5 Activities carried out by visitors to Attleborough town centre (% of all visitors to each centre)

Activity	Attleborough	Average for all Centres
Shopping		
Non-food shopping	40.6	49.0
Food shopping	55.4	47.1
Visit the market	0.0	7.0
Window shop/browse	13.6	15.1
Click and collect	0.0	0.2
Leisure		
Go for a walk	4.2	6.5
Café/pub/restaurant	24.0	24.7
Leisure activity	4.5	9.2
Other services		
Banks/other financial institutions	3.2	7.8
Health facilities	12.8	9.4
Buying fuel	2.7	3.2
Post office	4.6	5.7
Library	1.3	1.9
Other services	5.7	6.4
Other activities		
Travelling to/from work	8.6	6.7
Education/school run	4.4	2.6
Visting family/friends	17.9	17.0

Source: NEMS household survey (March 2025).

* percentages add to more than 100% due to multiple activities.

5.16

The capacity analysis suggests Attleborough has a combined retail and food/beverage turnover of £85.41 million, of which over half is convenience goods shopping. The combined turnover is the second lowest of the five centres in the District. Attleborough has a reasonably strong food/beverage turnover (£16.52 million) when compared with Swaffham (£8.289 million) and Watton (6.95 million).

Summary of Attleborough's strengths and weaknesses

Strengths

- The survey results indicate that Attleborough is a reasonably strong retail destination, particularly food shopping.
- Attleborough is a relatively compact centres that is easy to navigate.
- The town centre provides a good range of service facilities including restaurants and cafes and hairdressers/beauty salons.
- Compared with other centres in Breckland, there were lower proportions of negative views about Attleborough, suggesting lower levels of customer dissatisfaction.

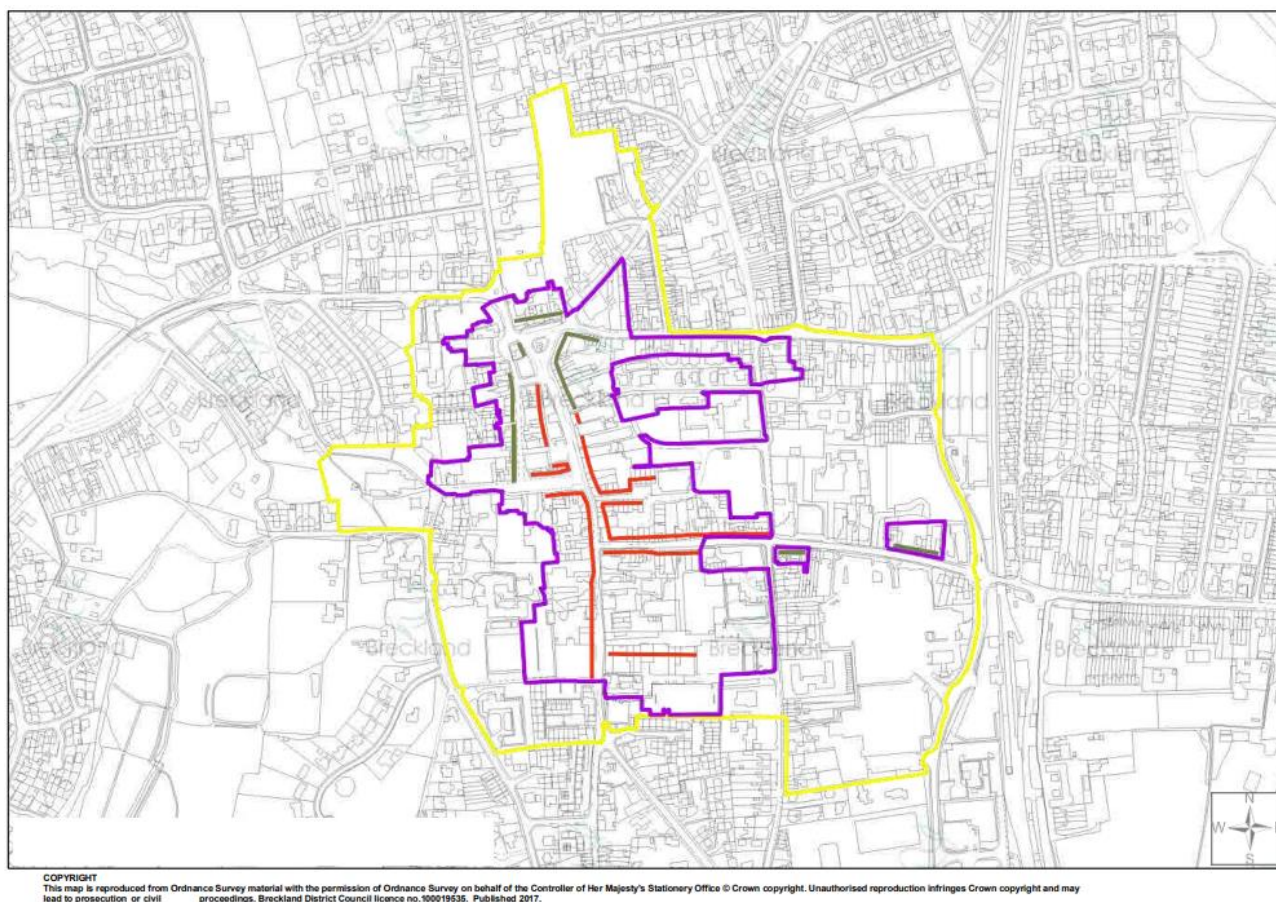
Weaknesses

- There is an unbalanced mix of national multiple retailers and smaller independent retailers – small independent retailers greatly outweigh national retailers, providing less of a draw and potential lower levels of resilience to economic trends.
- There is a low proportion of clothing and footwear stores for a centre of this size.
- There is a shortage of large modern premises suitable for national multiple retailers.

6.0 Dereham town centre

- 6.1 Dereham is in the northeast of the District and is designated a ‘Main Centre’ in the adopted Breckland Local Plan. It is a second-tier centre below Thetford, but above Attleborough, Swaffham and Watton. The designated town centre boundary in the adopted local plan is defined by the yellow line in Figure 6.1. The primary shopping area (PSA) is defined by the purple line.

Figure 6.1 Dereham town centre boundary and frontages



Source: Adopted Breckland Local Plan

Mix of uses and vacancies

- 6.2 Dereham has 194 retail and service units, the highest of the five town centres in Breckland. The mix of uses is set out in Table 6.1, which is compared to the District and UK averages. There were 29 vacant units in January 2024, a vacancy rate of 14.9 %, which is broadly in line with the District and UK averages. This suggests the supply of shop premises is suitable for operator demand. The Breckland Retail Study 2014 indicated a lower vacancy rate (11.2%) slightly below the national average (12.1%) at that time, which suggests the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table 6.1 Mix of retail and service uses - Dereham

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	10	5.2	8.9	9.8
Comparison retail	58	29.9	25.1	28.2
Financial/professional	23	11.9	11.9	8.1
Restaurants/cafés	16	8.2	10.4	11.2
Pubs/bars	5	2.6	3.1	5.2
Hot food takeaways	11	5.7	6.0	6.4
Other non-retail services	42	21.6	20.5	16.1
Vacant	29	14.9	14.1	14.8
Total	194	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages March 2025.

- 6.3 Dereham's proportion of comparison retail units broadly reflects the UK average, and is slightly higher than the District average. Whilst Co-op, Iceland and Morrisons anchor the town centre, the proportion of convenience retail units is lower than the District average and half the UK average. Dereham has a lower proportion of restaurants/cafés, pubs/bars, and hot food takeaways than both the District and UK averages. Just over a fifth of Dereham units are other non-retail services, higher than the national and District averages. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables 6.2 and 6.3.
- 6.4 Table 6.2 shows Dereham has 58 comparison goods outlets, which is the highest in the District, compared with 32 outlets in Swaffham. The number of comparison goods outlets has fallen by 34 units from 92 in 2014. The centre has 13 of the 14 Goad Plan comparison shop categories represented and the choice of outlets in most categories is good. All categories are represented except for cars, motorcycles, and accessories.
- 6.5 The choice of outlets in the represented categories is generally good with 6 of the 13 categories present in the centre possessing more than 5 outlets. Dereham has an extensive choice of charity/ second-hand shops, clothing/ footwear and chemists/ drugstores/ opticians.
- 6.6 Dereham has a good selection of non-retail services (97 units) as shown in Table 6.3, also the highest in the District. The number of service outlets has increased by 7 units up from 90 in 2014. However, there are no launderettes/ dry cleaners. There is a lower than average representation of restaurants/ cafés, hot food takeaways, and particularly pubs/ bars. Dereham has a strong hairdresser/ beauty parlour sector, and a strong choice of banks/ building societies.

Table 6.2 Mix of comparison goods retail uses – Dereham

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	9	15.5	8.5	21.4
Furniture, carpets and textiles	5	8.6	6.7	7.3
Books, art, cards and stationers	5	8.6	7.9	6.3

Type	Number of units	% units	% units District average	% units UK average
Electrical, music and photography	6	10.3	7.3	9.5
DIY, hardware and homeware	2	3.4	3.0	7.0
China, glass and gifts	1	1.7	4.3	5.8
Cars, motorcycles and accessories	0	0.0	0.6	1.3
Chemists, drugstores and opticians	8	13.8	14.0	12.1
Variety, department and catalogue	2	3.4	4.9	1.3
Florists, nurserymen and seedsmen	2	3.4	2.4	2.0
Toys, hobby, cycle and sports	3	5.2	5.5	5.4
Jewellers	1	1.7	4.3	5.4
Charity and second-hand shops	11	19.0	22.0	9.7
Other comparison goods retailers	3	5.2	8.5	5.6
Total	58	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025.

Table 6.3 Mix of non-retail service uses – Dereham

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	16	18.4	24.9	26.1
Hot food takeaway	11	12.6	14.3	15.0
Public house / bar	5	5.7	7.3	12.2
Bank / other financial service	13	14.9	8.4	6.7
Betting shop / casino / amusement	2	2.3	2.6	3.5
Estate agent / valuer	6	6.9	9.2	6.9
Travel agent	2	2.3	1.8	1.3
Hairdresser / beauty parlour	32	36.8	31.1	26.8
Launderette / dry cleaner	0	0.0	0.4	1.5
Sub-total	87	100.0	100.0	100.0
Other non-retail services	10			
Total	97			

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025

- 6.7 Other non-retail service uses in Dereham include fitness studios, funeral directors, charity offices, tailors, phone repair and key cutting shops. Dereham also has a community hall, working men's club, Post Office, library, a cinema, places of worship, educational and play/gym facilities. The variety of uses reflects Dereham's dual shopping and day-to-day service role.
- 6.8 Dereham has the highest number of national/regional multiples in the District, indicative of its position in the District's hierarchy. However, most outlets in the centre are small independent traders. The national multiple retailer and food/beverage outlets are shown in Table 6.4.

Table 6.4 Multiple retailers – Dereham

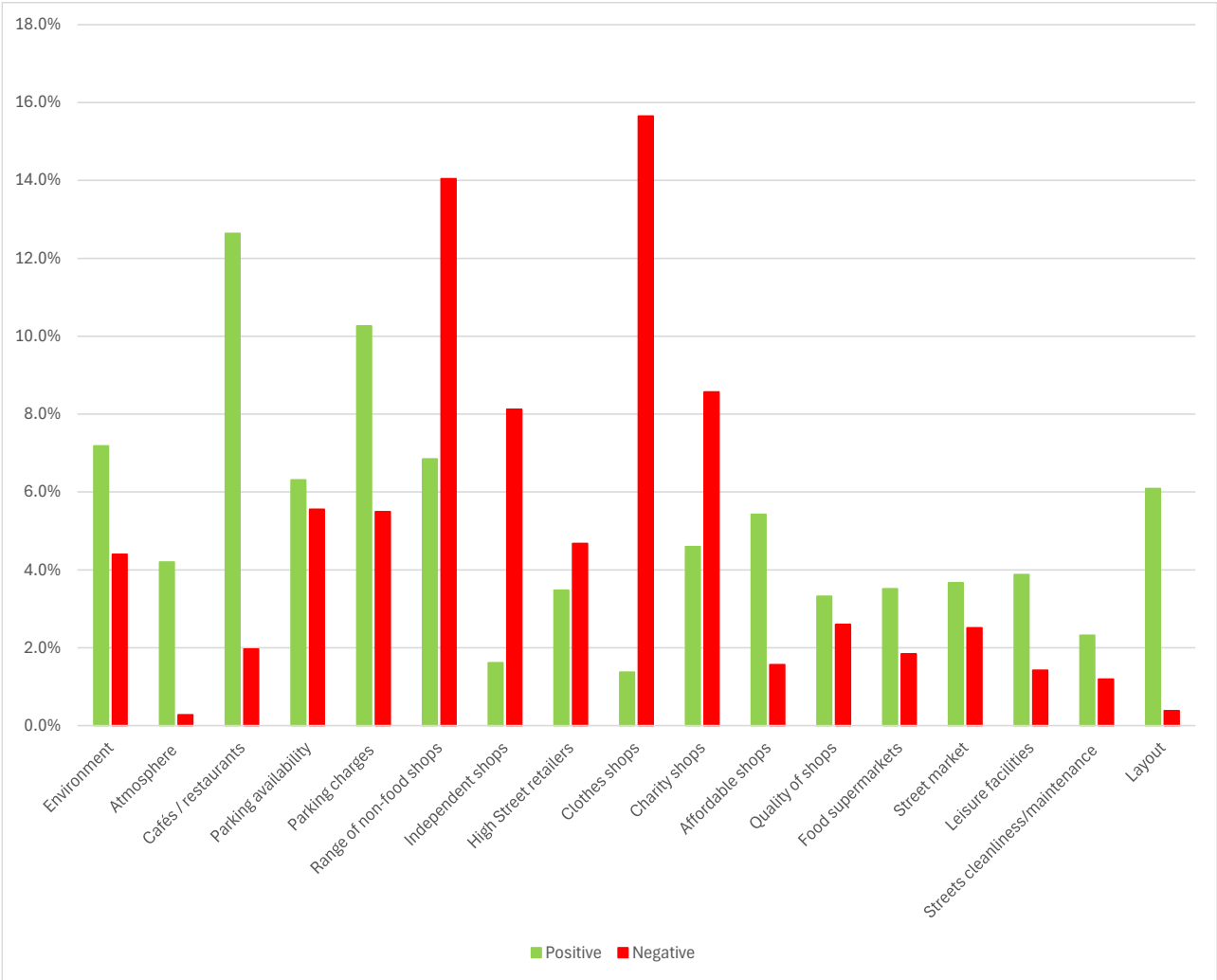
Comparison retail	Convenience retail	Food and beverage
Bon Marche	Co-op	Costa Coffee
Boots	Greggs	Starbucks
Card Factory	Iceland	Subway
Peacocks	Morrisons	Wetherspoons
Poundland	Holland and Barrett	
QD		
Savers		
Shoezone		
Sue Ryder		
Vodafone		
The Old Factory Shop		

Source: Breckland District Council land use survey 2024

Customer views

- 6.9 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Dereham in the last year. Around 42% of respondents in the study area had visited Dereham, the highest of the five centres in the District. Of those who had used shops/services in Dereham, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Dereham town centre and the negative factors where improvements were suggested are summarised and compared in Figure 6.2 below.
- 6.10 Compared with other centres in Breckland, there were higher proportions of negative views about Dereham, suggesting higher expectations for a larger town centre. There were higher levels of satisfaction relating to the quality of environment, atmosphere, layout, café/restaurants, affordable shops, leisure facilities and car parking charges. The proximity of the centre to home (not included in graph above) was a the most mentioned positive factor (21.9%).
- 6.11 There were higher levels of dissatisfaction relating to the availability of clothing shops, non-food shops in general, independent shops and charity shops (too many). In terms of improvements, 6.2% of respondents suggested less traffic congestion/improve access and 5.4% mentioned reducing empty shops. There were mixed or limited views in relation to other factors such as car parking availability and high street retailers.
- 6.12 Overall, taking all aspects that attracted over 5% of comments, six aspects were viewed more positively, with three viewed negatively. These results indicate mixed views about Dereham town centre.

Figure 6.2 Positive and negative factors mentioned by visitors about Dereham (% of all visitors)



Source: NEMS household survey (March 2025)

Customer activities and catchment area

- 6.13 The household survey results indicate 42.1% of study area respondents had visited shops, services or leisure facilities in Dereham during the last year, comparable with Thetford (40.1%) and significantly higher than the other centres in the District. Over half (55%) of these visitors to Dereham live in the local area (Zone 2), but significant numbers also come from Zone 3 – Swaffham and Zone 4 – Watton. These results suggest Dereham performs well as the main centre in the north of the District, attracting visitors from across most zones. About 10.4% of households in the study area indicated that they do most of their non-food shopping in Dereham town centre, which was the highest of the five centres in the District.
- 6.14 The breakdown of activities undertaken by visitors to Dereham is shown and compared with the District average in Table 6.5. The survey results indicate that Dereham is a strong retail destination for both food and non-food shopping. Dereham has a broad range of other

non-retail activities, in most cases above the average for the five main centres in the District.

Table 6.5 Activities carried out by visitors to Dereham town centre (% of all visitors to each centre)

Activity	Dereham	Average for all Centres
Shopping		
Non-food shopping	58.8	49.0
Food shopping	51.5	47.1
Visit the market	4.3	7.0
Window shop/browse	17.0	15.1
Click and collect	0.0	0.2
Leisure		
Go for a walk	5.6	6.5
Café/pub/restaurant	23.5	24.7
Leisure activity	12.9	9.2
Other services		
Banks/other financial institutions	12.4	7.8
Health facilities	10.0	9.4
Buying fuel	5.6	3.2
Post office	7.4	5.7
Library	2.5	1.9
Other services	9.6	6.4
Other activities		
Travelling to/from work	5.2	6.7
Education/school run	2.6	2.6
Visting family/friends	10.0	17.0

Source: NEMS household survey (March 2025).

* percentages add to more than 100% due to multiple activities.

- 6.15 The capacity analysis suggests Dereham has a combined retail, food/beverage and leisure turnover of £310.49 million. This combined turnover is the second highest of the five centres in the District.

Summary of Dereham's strengths and weaknesses

Strengths

- Dereham is the largest shopping centre in the north of Breckland. The household survey results indicate that Dereham is the most popular town within the District for residents for non-food shopping.
- Dereham is a compact centres that is relatively easy to navigate.
- The centre is served by a number of public car parks which are free. These are distributed throughout the centre ensuring easy access by car.
- The town centre provides a good range of service facilities including banks and building societies and hairdressers/beauty salons.

- The historic character of the town centre provides an attractive town centre destination.
- There is a reasonable mix of national multiple retailers and smaller independent retailers.

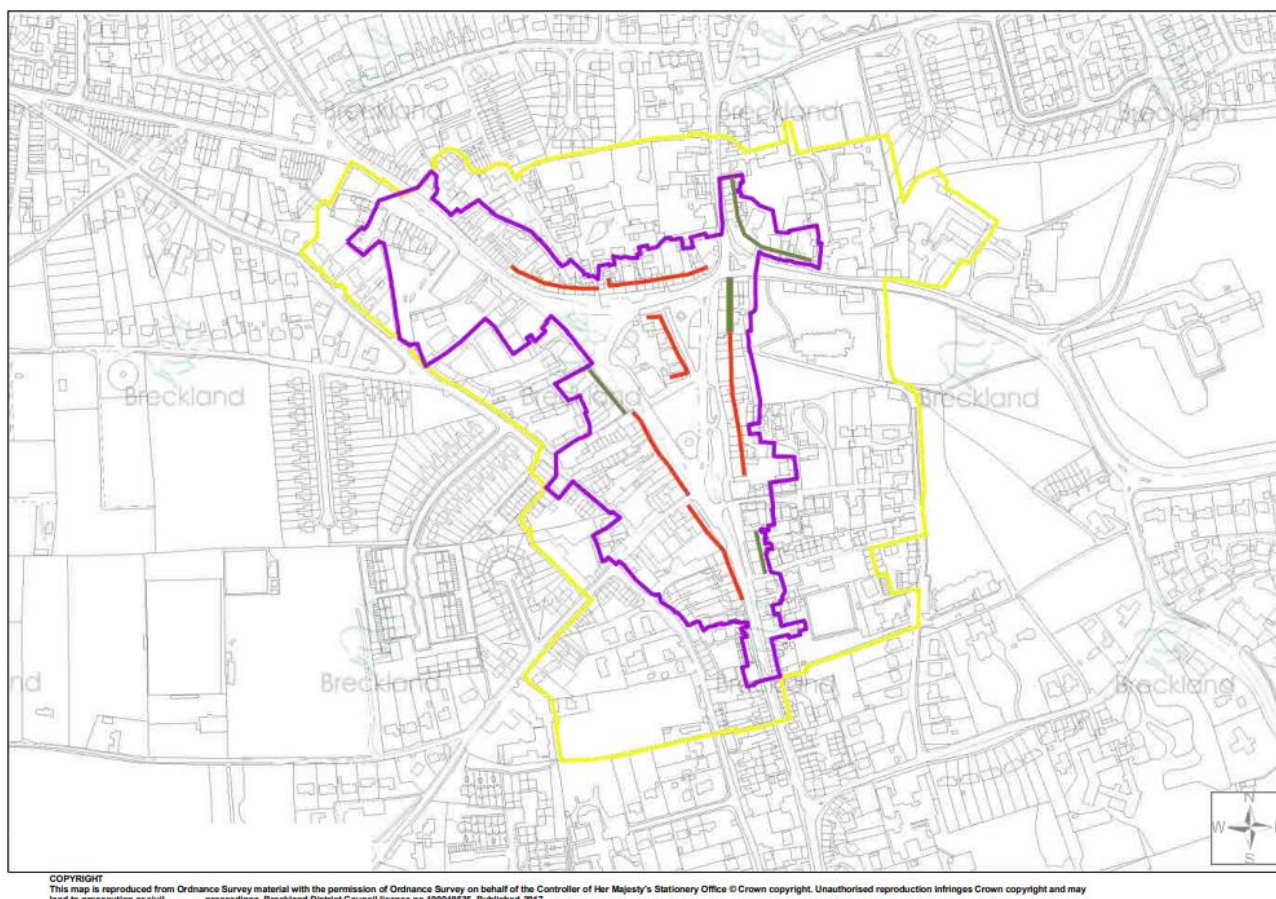
Weaknesses

- Despite having a high number of national multiple outlets, there is a low proportion of clothing and footwear stores for a centre of this size.
- There is a notably lower proportion of restaurants and pubs/ cafés that would contribute to the evening economy.
- Compared with other centres in Breckland, there were higher proportions of negative views about Dereham, suggesting higher expectations for a larger town centre.
- There is a shortage of large modern premises suitable for national multiple retailers.

7.0 Swaffham town centre

- 7.1 Swaffham is in the northwest of the District and is designated a 'Medium Town Centre' in the adopted Breckland Local Plan. It is a third-tier centre below Thetford and Dereham. The designated town centre boundary in the adopted local plan is defined by the yellow line in Figure 7.1. The primary shopping area (PSA) is defined by the purple line.

Figure 7.1 Swaffham town centre boundary and frontages



Source: Adopted Breckland Local Plan

Mix of uses and vacancies

- 7.2 Swaffham has 112 retail and service units, the third highest of the five town centres in Breckland. The mix of uses is set out in Table 7.1, which is compared to the District and UK averages. There were 9 vacant units in October 2024, a vacancy rate of 8.0%, which is below the District and UK averages. This suggests the supply of shop premises is below operator demand. The Breckland Retail Study 2014 indicated a higher vacancy rate (10.8%) slightly below the national average (12.1%) at that time.

Table 7.1 Mix of retail and service uses - Swaffham

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	10	8.9	8.9	9.9
Comparison retail	32	28.6	25.1	28.2
Financial/professional	12	10.7	11.9	8.1
Restaurants/cafés	13	11.6	10.4	11.2
Pubs/bars	6	5.4	3.1	5.1
Hot food takeaways	6	5.4	6.0	6.4
Other non-retail services	24	21.4	20.5	16.1
Vacant	9	8.0	14.1	14.8
Total	112	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025.

- 7.3 The composition mix of uses in Swaffham is similar to the District average, which has a number of notable differences to the UK average. Swaffham's proportion of comparison retail units reflects the UK average but is higher than the District average. The proportion of convenience retail units is the same as the District average and slightly less than the UK average. Asda and Iceland stores anchor the town centre. The proportion of financial/professional services is less than the District average but remains above the UK average. Swaffham's proportion of restaurants/cafés, pubs/bars, and hot food takeaways are broadly in line with the District and UK averages. Over a fifth of Swaffham's units are other non-retail services, higher than the national and District averages. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables 7.2 and 7.3.
- 7.4 Table 7.2 shows Swaffham has 32 comparison goods outlets, which is the second highest in the District, compared with 58 outlets in Dereham. The number of comparison goods outlets has reduced by 12 units from 44 in 2014. The centre has 12 of the 14 Goad Plan comparison shop categories represented and the choice of outlets in most categories is reasonable. Absent categories are cars/motorcycles/accessories and variety/department/catalogue.
- 7.5 The choice of outlets in the represented categories is generally limited with less than four outlets. However, Swaffham has a reasonable choice of charity/second-hand shops and other comparison goods retailers.
- 7.6 Swaffham has a reasonable selection of non-retail services (61 units) as shown in Table 7.3, but the second lowest in the District. The number of service outlets has increased by 8 units up from 53 in 2014. However, there are no travel agents or laundrettes/dry cleaners. There is a strong representation of restaurants/cafés and hot food takeaways, but a lower representations of pubs/bars. Swaffham also has a high provision of hairdressers/beauty parlours.

Table 7.2 Mix of comparison goods retail uses – Swaffham

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	1	3.1	8.5	21.4
Furniture, carpets and textiles	2	6.3	6.7	7.3
Books, art, cards and stationers	2	6.3	7.9	6.3
Electrical, music and photography	1	3.1	7.3	9.4
DIY, hardware and homeware	1	3.1	3.0	7.0
China, glass and gifts	4	12.5	4.3	5.8
Cars, motorcycles and accessories	0	0.0	0.6	1.3
Chemists, drugstores and opticians	4	12.5	14.0	12.1
Variety, department and catalogue	0	0.0	4.9	1.3
Florists, nurserymen and seedsmen	1	3.1	2.4	2.0
Toys, hobby, cycle and sports	3	9.4	5.5	5.4
Jewellers	2	6.3	4.3	5.4
Charity and second-hand shops	6	18.8	22.0	9.7
Other comparison goods retailers	5	15.6	8.5	5.6
Total	32	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025.

Table 7.3 Mix of non-retail service uses – Swaffham

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	13	25.5	24.9	26.1
Hot food takeaway	6	11.8	14.3	15.0
Public house / bar	6	11.8	7.3	12.2
Bank / other financial service	5	9.8	8.4	6.7
Betting shop / casino / amusement	1	2.0	2.6	3.5
Estate agent / valuer	3	5.9	9.2	6.9
Travel agent	1	2.0	1.8	1.3
Hairdresser / beauty parlour	16	31.4	31.1	26.8
Launderette / dry cleaner	0	0.0	0.4	1.5
Sub-total	51	100.0	100.0	100.0
Other non-retail services	10			
Total	61			

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025

7.7

Other non-retail service uses in Swaffham include yoga studios, funeral directors, tailors, phone repair and shoe repairer shops. Swaffham also has a community hall, social club, Post Office, a library, places of worship, educational and play/gym facilities. The variety of uses reflects Swaffham's dual shopping and day-to-day service role.

- 7.8 Swaffham features a range of national multiples, indicative of its position as a second-tier centre in the District's hierarchy. Outlets in the centre are primarily small independent traders. The national multiple retailer and food/beverage outlets are shown in Table 7.4.

Table 7.4 Multiple retailers – Swaffham

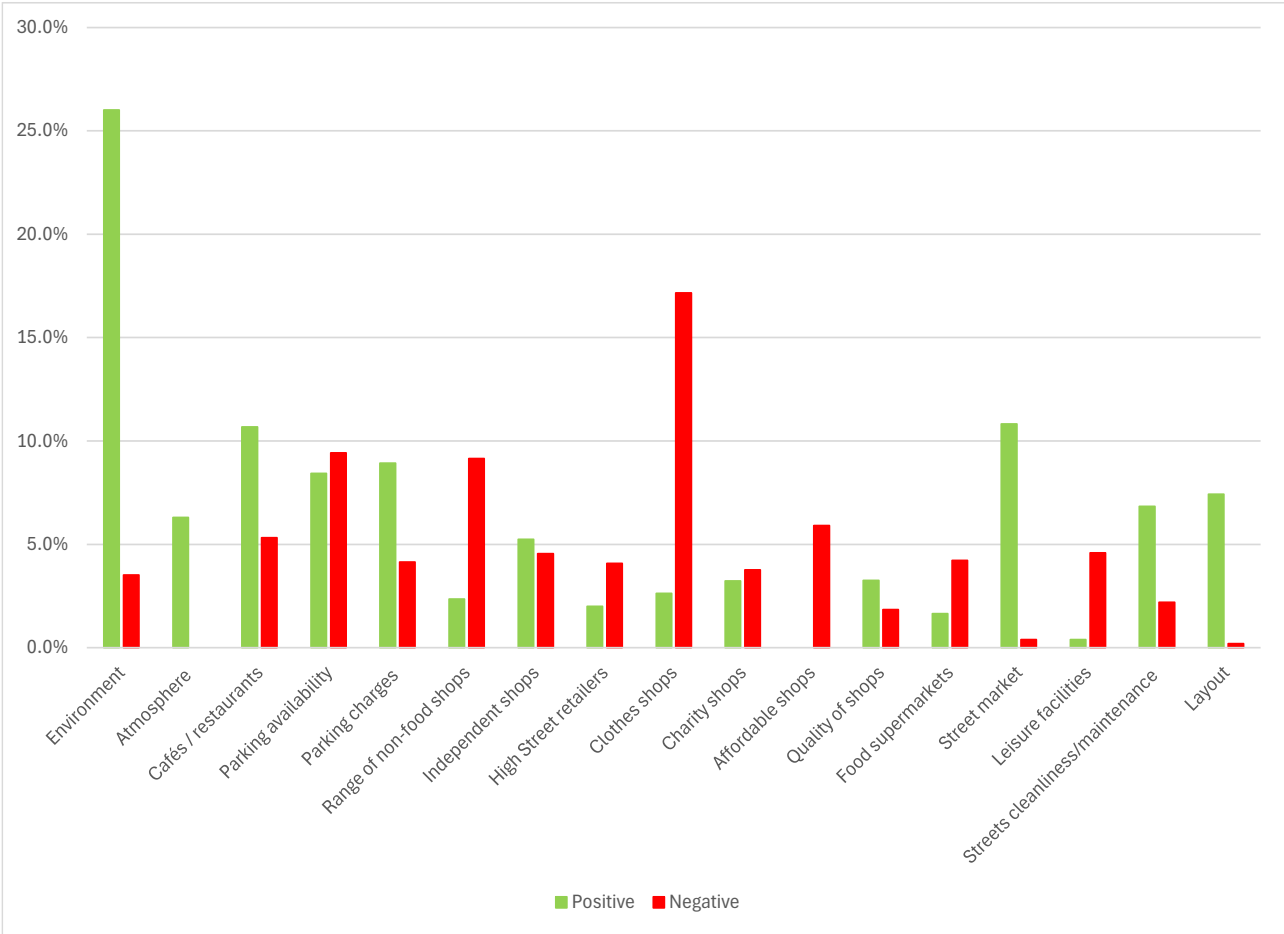
Comparison retail	Convenience retail	Food and beverage
Boots	Asda	Costa Coffee
QD	Iceland	Domino's Pizza
The Works	Tesco	
Suer Ryder	Morrisons Daily	
	Greggs	

Source: Breckland District Council land use survey 2024

Customer views

- 7.9 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Swaffham in the last year. Just under 25% of respondents in the study area had visited Swaffham, the third highest of the five centres in the District. Of those who had used shops/services in Swaffham, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Swaffham town centre and the negative factors where improvements were suggested are summarised and compared in Figure 7.2 below.
- 7.10 Compared with other centres in Breckland, there were higher proportions of positive rather than negative views about Swaffham. Nevertheless, views were generally mixed. The range of clothing and non-food shops generally attracted higher negative opinions, as did the lack of affordable shops and leisure facilities. The quality of the environment, street cleanliness and the centre's layout attracted higher levels of positive comments. Cafés and restaurants, car parking charges and the street market also attracted higher levels of satisfaction.
- 7.11 The availability of car parking spaces attracted mixed views, as did the provision of independent shops, charity shops, high street retailers and food supermarkets. Overall, taking all aspects that attracted over 5% of comments, eight aspects were viewed more positively, with four viewed negatively. These results indicate generally positive or mixed views about Swaffham town centre. The proximity of the centre to home (not included in graph above) was the second most liked attribute (12.3%) after the quality of the environment. This was followed by the street market (10.8%) and cafés/restaurants (10.7%).

Figure 7.2 Positive and negative factors mentioned by visitors about Swaffham (% of all visitors)



Source: NEMS household survey (March 2025).

Customer activities and catchment area

- 7.12 The household survey results indicate 24.8% of study area respondents had visited shops, services or leisure facilities in Swaffham during the last year, which was significantly lower than Dereham (42.1%) and Thetford (40.1%). These visitors were spread across the five study area zones. These results suggest Swaffham performs well as a second-tier centre in the District, attracting visitors from all zones.
- 7.13 Only 1.4% of households in the study area indicated that they do most of their non-food shopping in Swaffham, the lowest of all centres within the District. In the local zone 11.9% of households do most of their non-food shopping in Swaffham and the main other destinations in this local zone were Kings Lynn (16.5%) and Norwich (14.8%).
- 7.14 The breakdown of activities undertaken by visitors to Swaffham is shown and compared with the District average in Table 7.5. The survey results indicate that Swaffham is a reasonably strong retail destination for both food and non-food shopping, albeit below the average for the five main centres in the District. Swaffham is above average for food/beverage and other non-retail service use, but its leisure and financial service role is more limited.

Table 7.5 Activities carried out by visitors to Swaffham town centre (% of all visitors to each centre)

Activity	Swaffham	Average for all Centres
Shopping		
Non-food shopping	41.3	49.0
Food shopping	45.6	47.1
Visit the market	25.2	7.0
Window shop/browse	15.5	15.1
Click and collect	0.0	0.2
Leisure		
Go for a walk	3.9	6.5
Café/pub/restaurant	27.0	24.7
Leisure activity	3.1	9.2
Other services		
Banks/other financial institutions	5.4	7.8
Health facilities	6.9	9.4
Buying fuel	1.5	3.2
Post office	6.6	5.7
Library	0.2	1.9
Other services	6.7	6.4
Other activities		
Travelling to/from work	5.0	6.7
Education/school run	2.0	2.6
Visting family/friends	14.8	17.0

Source: NEMS household survey (March 2025).

* percentages add to more than 100% due to multiple activities.

7.15

The capacity analysis suggests Swaffham has a combined retail, food/beverage and leisure turnover of £70.3 million, which is predominantly convenience goods shopping. This combined turnover is the lowest of the five centres in the District.

Summary of Swaffham's strengths and weaknesses

Strengths

- Swaffham performs well as a second-tier centre in the District, attracting visitors from all zones.
- The centre has an wide selection of independent specialist retailers serving a niche retailer offer.
- Watton has a low vacancy rate, which suggests that demand for premises is relatively strong, and the number of vacant units in the centre has remained broadly unchanged since the 2014 Study.

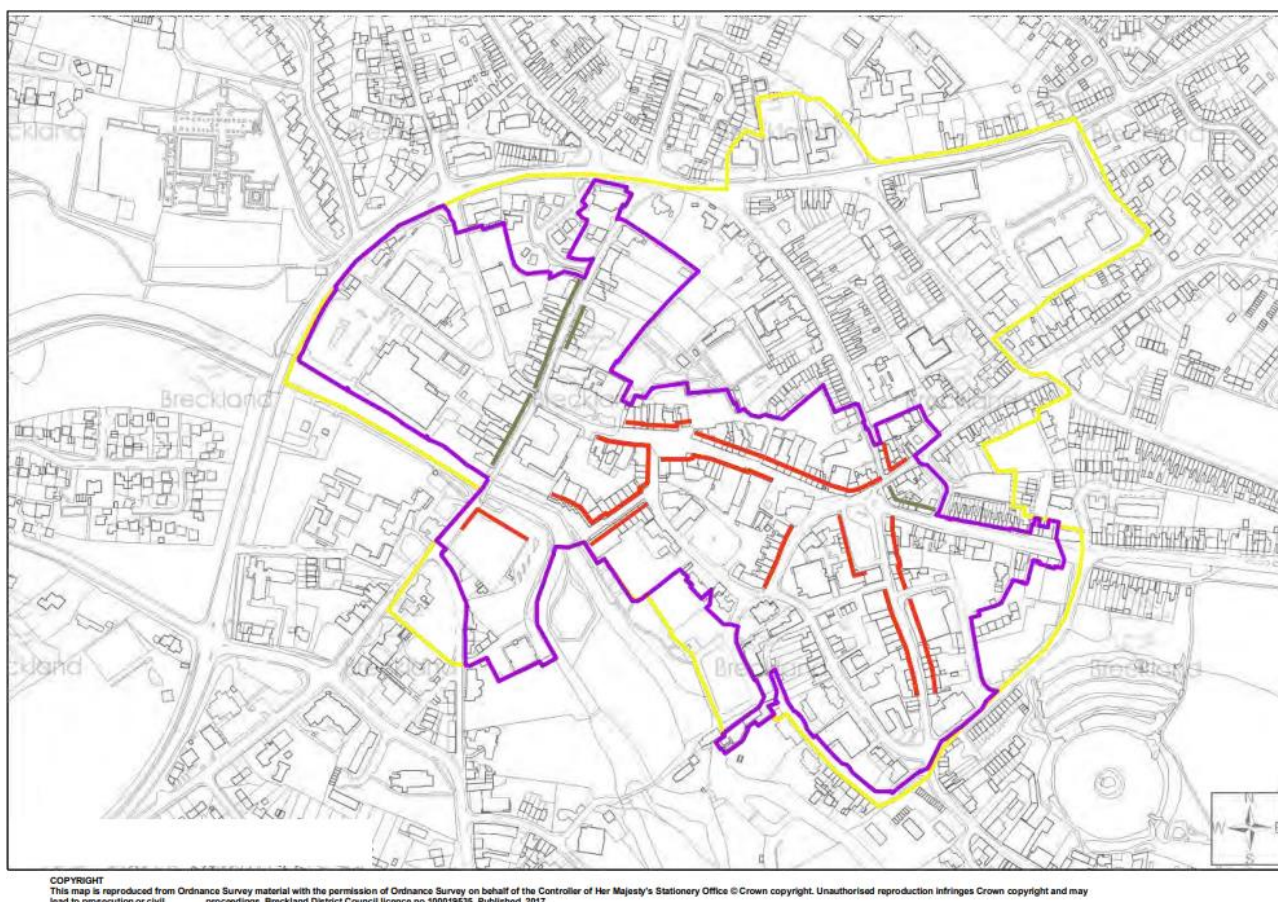
Weaknesses

- As 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.
- The combined retail, food/beverage and leisure turnover is one of the lowest in the District.

8.0 Thetford town centre

- 8.1 Thetford is in the southwest of the District and is designated a 'Key Centre' in the adopted Breckland Local Plan. It is a first-tier centre above Dereham and the three other designated town centres. The designated town centre boundary in the adopted local plan is defined by the yellow line in Figure 8.1. The primary shopping area (PSA) is defined by the purple line.

Figure 8.1 Thetford town centre boundary and frontages



Source: Adopted Breckland Local Plan

Mix of uses and vacancies

- 8.2 Thetford has 153 retail and service units, the second highest of the five town centres in Breckland. The mix of uses is set out in Table 8.1, which is compared to the District and UK averages. There were 36 vacant units in April 2023, a vacancy rate of 23.5%, which is significantly higher than the District and UK averages. This suggests the supply of shop premises is above operator demand. The Breckland Retail Study 2014 indicated a lower vacancy rate (11.8%) slightly below the national average (12.1%) at that time, which suggests the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table 8.1 Mix of retail and service uses - Thetford

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	14	9.2	8.9	9.9
Comparison retail	30	19.6	25.1	28.2
Financial/professional	21	13.7	11.9	8.1
Restaurants/cafés	18	11.8	10.4	11.2
Pubs/bars	2	1.3	3.1	5.2
Hot food takeaways	7	4.6	6.0	6.4
Other non-retail services	25	16.3	20.5	16.1
Vacant	36	23.5	14.1	14.8
Total	153	100.0	100.0	100.0

Source: Breckland District Council land use survey 2023 and Goad Plan UK averages 2025

- 8.3 Thetford's proportion of comparison retail units is lower than both averages, and the proportion of convenience retail units in Thetford is slightly higher than the District average but lower than the UK average. Tesco and Aldi stores anchor the town centre. The proportion of financial/professional services and restaurants/cafés is broadly in line with the UK and District averages. 16.3% of Thetford's units are other non-retail services, in line with the national average but lower than the District average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables 8.2 and 8.3.
- 8.4 Table 8.2 shows Thetford has 30 comparison goods outlets, which is the third highest in the District, compared with 58 and 32 outlets in Dereham and Swaffham, respectively. The number of comparison goods outlets has reduced by one unit from 31 in 2014. The centre has 11 of the 14 Goad Plan comparison shop categories represented with the exception of DIY/ hardware/ homeware, cars/ motorcycles/ accessories, and jewellers.
- 8.5 The choice of outlets in the represented categories is generally limited with most categories containing less than four outlets. However, Thetford has a reasonable choice of charity/second-hand shops and chemists/drugstores/opticians.
- 8.6 Thetford has a broad selection of non-retail services (73 units) as shown in Table 8.3, also the second highest in the District. The number of service outlets has increased by 19 units, up from 54 in 2014. However, there are no launderettes/dry cleaners.
- 8.7 When compared with the UK, Thetford has an above-average provision of estate agents/valuers, travel agents and restaurants/cafés. Thetford has a greater representation of financial services than the national average, including betting shops/ casinos/ amusements, which is the highest proportion in the District. Thetford features three banks/building societies, as well as professional services, such as solicitors and accountants.

Table 8.2 Mix of comparison goods retail uses – Thetford

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	3	10.0	8.5	21.4

Type	Number of units	% units	% units District average	% units UK average
Furniture, carpets and textiles	1	3.3	6.7	7.3
Books, art, cards and stationers	3	10.0	7.9	6.3
Electrical, music and photography	2	6.7	7.3	9.4
DIY, hardware and homeware	0	0.0	3.0	7.0
China, glass and gifts	1	3.3	4.3	5.8
Cars, motorcycles and accessories	0	0.0	0.6	1.3
Chemists, drugstores and opticians	6	20.0	14.0	12.1
Variety, department and catalogue	3	10.0	4.9	1.3
Florists, nurserymen and seedsmen	1	3.3	2.4	2.0
Toys, hobby, cycle and sports	1	3.3	5.5	5.4
Jewellers	0	0.0	4.3	5.4
Charity and second-hand shops	7	23.3	22.0	9.7
Other comparison goods retailers	2	6.7	8.5	5.6
Total	30	100.0	100.0	100.0

Source: Breckland District Council land use survey 2023 and Goad Plan UK averages 2025.

Table 8.3 Mix of non-retail service uses – Thetford

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	18	36.0	24.9	26.1
Hot food takeaway	7	14.0	14.3	15.0
Public house / bar	2	4.0	7.3	12.2
Bank / other financial service	3	6.0	8.4	6.7
Betting shop / casino / amusement	3	6.0	2.6	3.5
Estate agent / valuer	5	10.0	9.2	6.9
Travel agent	2	4.0	1.8	1.3
Hairdresser / beauty parlour	10	20.0	31.1	26.8
Launderette / dry cleaner	0	0.0	0.4	1.4
Sub-total	50	100.0	100.0	100.0
Other non-retail services	23			
Total	73			

Source: Breckland District Council land use survey 2023 and Goad Plan UK averages 2025

- 8.8 Other non-retail service uses in Thetford include fitness studios, funeral directors, phone repair and key cutting shops. Thetford also has a community centre, Social Club, a Post Office, a library, a cinema, places of worship, educational and play/gym facilities. The variety of uses reflects Thetford's dual shopping and day-to-day service role.
- 8.9 Thetford has a reasonable number of national multiples, indicative of its position as a first-tier centre in the District's hierarchy. Outlets in the centre are a mix of small independent traders and multiple retailers. The national multiple retailer and food/beverage outlets are shown in Table 8.4.

Table 8.4 Multiple retailers – Thetford

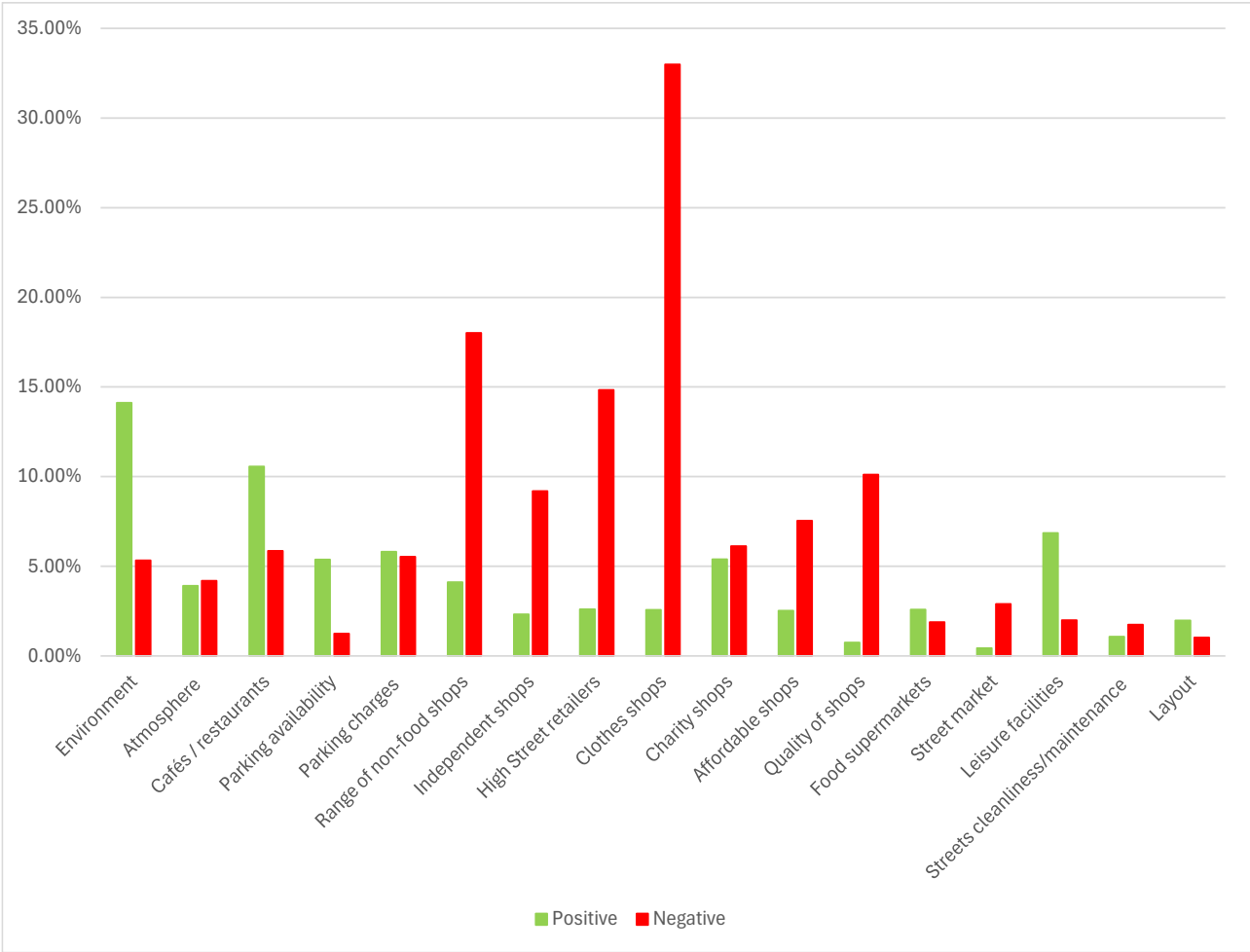
Comparison retail	Convenience retail	Food and beverage
Superdrug	Aldi	Costa
CeX	Farmfoods	Subway
Poundland	Tesco Express	Wetherspoons
Halfords	Londis	
Jollyes – The Pet People		
Poundland		
Roys of Thetford		
Savers		
The Works		
WH Smiths		
YMCA		

Source: Breckland District Council land use survey 2023

Customer views

- 8.10 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Thetford in the last year. About 40% of respondents in the study area had visited Thetford town centre, the second highest of the five centres in the District. Of those who had used shops/services in Thetford, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Thetford town centre and the negative factors where improvements were suggested are summarised and compared in Figure 8.2 below.
- 8.11 Compared to other centres in Breckland, there were higher proportions of negative views about Thetford, suggesting expectations are higher as one of the largest centres in the District. Views relating to the provision of shops were generally more negative than positive, particularly the range of clothing and non-food shops generally, as well as the range of independent shops, high street retailers and the quality of shops.
- 8.12 The quality of the environment, cafés/restaurants, leisure facilities and the availability of car parking spaces attracted higher levels of positive comments. Other factors attracted mixed views and/or low levels of responses.
- 8.13 Overall, taking all aspects that attracted over 5% of comments, five aspects were viewed more positively, with seven viewed negatively. These results indicate generally negative or mixed views about Thetford town centre. The proximity of the centre to home (not included in graph above) was the most liked attribute (14.9%), followed by the environment (14.1%).

Figure 8.2 Positive and negative factors mentioned by visitors about Thetford (% of all visitors)



Source: NEMS household survey (March 2025).

Customer activities and catchment area

- 8.14 The household survey results indicate 40.1% of study area respondents had visited shops, services or leisure facilities in Thetford during the last year, just below Dereham (42.1%) but significantly higher than the other centres in the District. Two third of these visitors to Thetford live in the local area (Zone 1), but significant numbers also come from Zone 4 – Watton and Zone 5 – Attleborough. These results suggest it performs well as the main centre in the south of the District.
- 8.15 Over 13% of households in the study area indicated that they do most of their non-food shopping in Thetford, but this is mostly in out-of-centre locations rather than the town centre.
- 8.16 The breakdown of activities undertaken by visitors to Thetford is shown and compared with the District average in Table 8.5. The survey results indicate that Thetford is a strong retail destination, particularly for non-food shopping. A high proportion also undertake leisure activities in the centre.

Table 8.5 Activities carried out by visitors to Thetford town centre (% of all visitors to each centre)

Activity	Thetford	Average for all Centres
Shopping		
Non-food shopping	61.7	49.0
Food shopping	44.5	47.1
Visit the market	2.5	7.0
Window shop/browse	16.8	15.1
Click and collect	0.9	0.2
Leisure		
Go for a walk	11.3	6.5
Café/pub/restaurant	24.6	24.7
Leisure activity	16.9	9.2
Other services		
Banks/other financial institutions	9.1	7.8
Health facilities	9.4	9.4
Buying fuel	2.6	3.2
Post office	1.4	5.7
Library	3.1	1.9
Other services	6.8	6.4
Other activities		
Travelling to/from work	4.3	6.7
Education/school run	1.7	2.6
Visting family/friends	18.7	17.0

Source: NEMS household survey (March 2025).

* percentages add to more than 100% due to multiple activities.

- 8.17 The capacity analysis suggests Thetford has a combined retail, food/beverage and leisure turnover of £320.25 million, which is the highest in the District, although this figure include out-of-centre stores including the retail parks.

Summary of Thetford's strengths and weaknesses

Strengths

- Thetford has a combined retail, food/beverage and leisure turnover of £320.25 million, which is the highest in the District
- Thetford has a strong representation of national multiples, indicative of its position as a first-tier centre in the District's hierarchy
- Thetford has a reasonable selection of non-retail services, the second highest in the District
- Survey results indicate that Thetford is a strong retail destination, particularly for non-food shopping. A high proportion also undertake leisure activities in the centre.

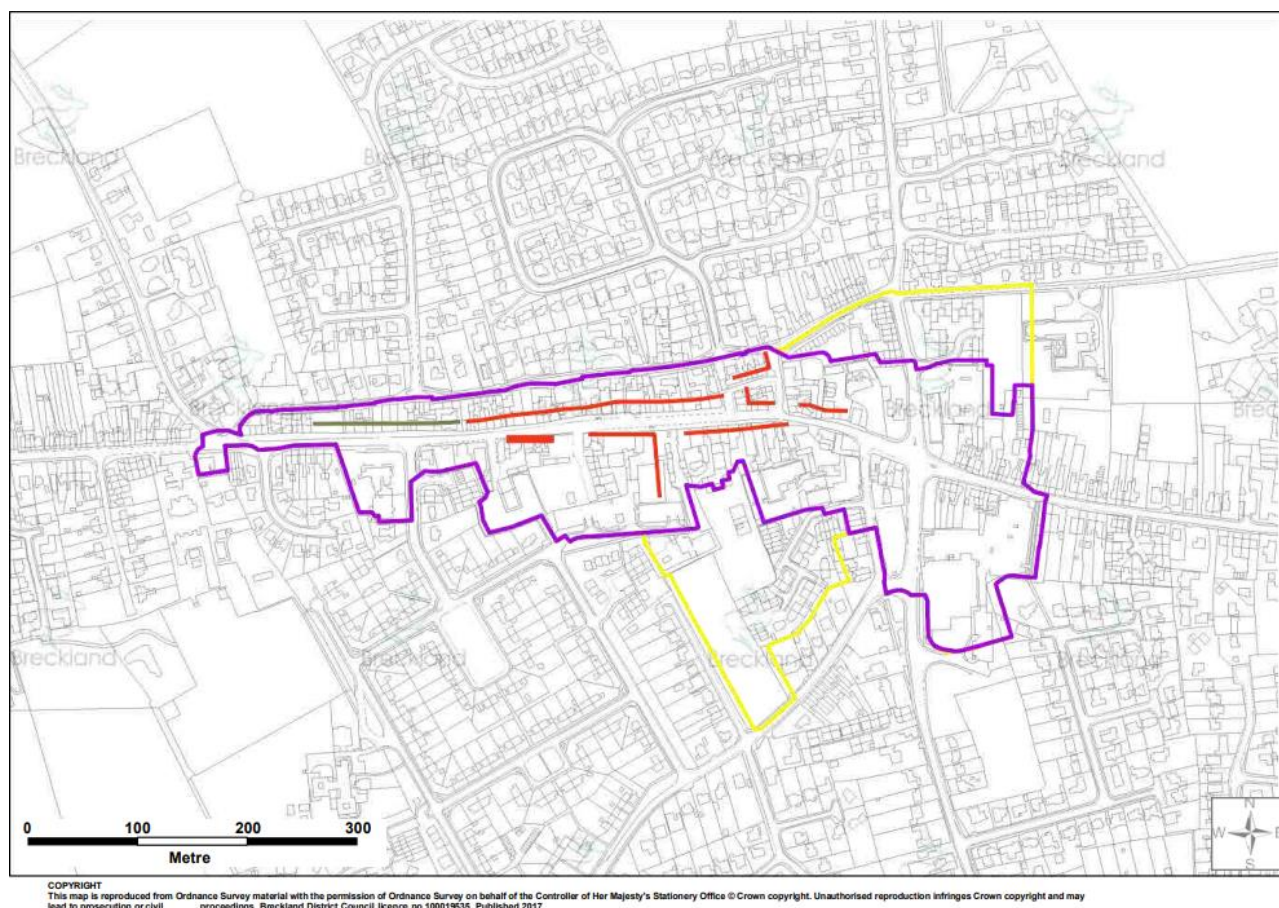
Weaknesses

- The centre has a high vacancy rate, which has significantly increased since the 2014 study
- The choice of comparison outlets in the represented categories is generally limited with most categories containing less than four outlets
- Compared to other centres in Breckland, there were higher proportions of negative views about Thetford, suggesting expectations are higher as one of the largest centres in the District

9.0 Watton town centre

- 9.1 Watton is in the centre of the District and is designated a 'Medium Town Centre' in the adopted Breckland Local Plan. It is a third-tier centre below Thetford and Dereham. The designated town centre boundary in the adopted local plan is defined by the yellow line in Figure 9.1. The primary shopping area (PSA) is defined by the purple line.

Figure 9.1 Watton town centre boundary and frontages



Source: Adopted Breckland Local Plan

Mix of uses and vacancies

- 9.2 Watton has 89 retail and service units, the lowest of the five town centres in Breckland. The mix of uses is set out in Table 9.1, which is compared to the District and UK averages. There were 8 vacant units in October 2024, a vacancy rate of 9.0%, which is below the District and UK averages. This suggests the supply of shop premises is slightly below operator demand. The Breckland Retail Study 2014 indicated a lower vacancy rate (7.4%) significantly below the national average (12.1%) at that time, which suggests the centre may not have fully recovered from the impacts of the Covid-19 pandemic and the cost-of-living crisis.

Table 9.1 Mix of retail and service uses - Watton

Type	Number of units	% units	% units District average	% units UK average
Convenience retail	12	13.5	8.9	9.9
Comparison retail	23	25.8	25.1	28.2
Financial/professional	11	12.4	11.9	8.1
Restaurants/cafés	8	9.0	10.4	11.2
Pubs/bars	4	4.5	3.1	5.2
Hot food takeaways	7	7.9	6.0	6.4
Other non-retail services	16	18.0	20.5	16.2
Vacant	8	9.0	14.1	14.8
Total	89	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025.

- 9.3 Watton's proportion of comparison retail units reflects the District average and is lower than the UK average, whilst the proportion of convenience retail units is higher than the District and UK averages with Tesco anchoring the town centre. The proportion of financial/professional services is greater than the UK average. Watton has a higher proportion of restaurants/cafés and lower proportions of pubs/bars and hot food takeaways. 180.% of Watton's units are other non-retail services, which is less than the District average but greater than the national average. A more detailed breakdown of comparison goods outlets and non-retail services is shown in Tables 9.2 and 9.3.
- 9.4 Table 9.2 shows Watton has 23 comparison goods outlets, which is the second lowest in the District. This compares with 21 outlets in Attleborough, which has the lowest number in the District. The number of comparison goods outlets has reduced by 8 units from 31 in 2014. The centre has 11 of the 14 Goad Plan comparison shop categories represented, missing clothing and footwear, florists/ nurserymen/seedsman, and toys, hobby, cycle and sports.
- 9.5 The choice of outlets in the represented categories is generally limited with less than three outlets, with the notable exception of charity/second-hand shops.
- 9.6 Watton has a reasonable selection of non-retail services (46 units) as shown in Table 9.3, also the lowest in the District. The number of service outlets has decreased by 8 units down from 54 in 2014. There are no travel agents, launderettes/dry cleaners or betting shops/casinos/amusements in the centre. There is a strong representation of hot food takeaways (contrary to other centres in the District).

Table 9.2 Mix of comparison goods retail uses – Watton

Type	Number of units	% units	% units District average	% units UK average
Clothing and footwear	0	0.0	8.5	21.4
Furniture, carpets and textiles	1	4.3	6.7	7.3
Books, art, cards and stationers	1	4.3	7.9	6.3
Electrical, music and photography	2	8.7	7.3	9.5

Type	Number of units	% units	% units District average	% units UK average
DIY, hardware and homeware	2	8.7	3.0	7.0
China, glass and gifts	1	4.3	4.3	5.8
Cars, motorcycles and accessories	1	4.3	0.6	1.3
Chemists, drugstores and opticians	2	8.7	14.0	12.1
Variety, department and catalogue	1	4.3	4.9	1.3
Florists, nurserymen and seedsmen	0	0.0	2.4	2.0
Toys, hobby, cycle and sports	0	0.0	5.5	5.4
Jewellers	3	13.0	4.3	5.4
Charity and second-hand shops	7	30.4	22.0	9.7
Other comparison goods retailers	2	8.7	8.5	5.6
Total	23	100.0	100.0	100.0

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025.

Table 9.3 Mix of non-retail service uses – Watton

Type	Number of units	% units	% units District average	% units UK average
Restaurant / café	8	23.5	24.9	26.1
Hot food takeaway	7	20.6	14.3	15.0
Public house / bar	4	11.8	7.3	12.2
Bank / other financial service	1	2.9	8.4	6.7
Betting shop / casino / amusement	0	0.0	2.6	3.5
Estate agent / valuer	5	14.7	9.2	6.9
Travel agent	0	0.0	1.8	1.3
Hairdresser / beauty parlour	9	26.5	31.1	26.8
Launderette / dry cleaner	0	0.0	0.4	1.5
Sub-total	34	100.0	100.0	100.0
Other non-retail services	12			
Total	46			

Source: Breckland District Council land use survey 2024 and Goad Plan UK averages 2025

- 9.7 Other non-retail service uses in Watton include funeral directors, phone repair and physiotherapist and sports clinic. Watton also has a youth club, Christian Community Centre, a Post Office, a library, places of worship, and a sports centre and social club. The variety of uses reflects Watton's dual shopping and day-to-day service role.
- 9.8 Watton has a low number of national multiples, indicative of its position as a third-tier centre in the District's hierarchy. Outlets in the centre are primarily small independent traders. The national multiple retailer and food/beverage outlets are shown in Table 9.4.

Table 9.4 Multiple retailers – Watton

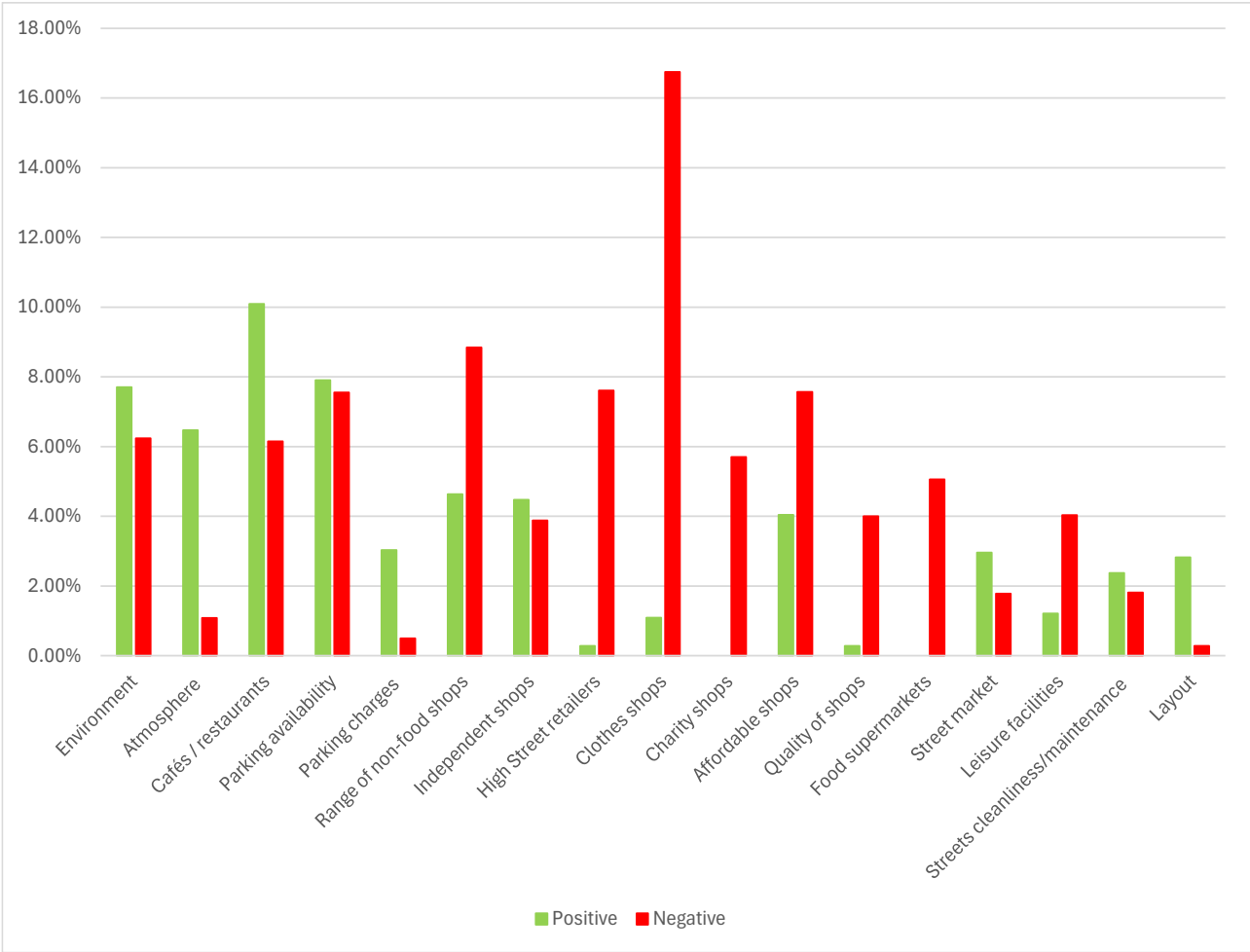
Comparison retail	Convenience retail	Food and beverage
The Original Factory Shop	Londis	
	Tesco	

Source: Breckland District Council land use survey 2024

Customer views

- 9.9 As part of the household survey, respondents across the study area were asked if they had used shop, services or leisure facilities in Watton in the last year. Around 21% of respondents in the study area had visited Watton, the second lowest of the five centres in the District. Of those who had used shops/services in Watton, respondents were asked what they liked about the centre and what improvements would make them visit more often. The main positive factors liked about Watton town centre and the negative factors where improvements were suggested are summarised and compared in Figure 5.2 below.
- 9.10 Customer views in Watton were mixed. However, views on shopping provision were generally more negative than positive. The range of clothing and non-food shops attracted higher negative opinions, as well as the range of high street shops, affordable shops, food supermarkets and the quality of shops.
- 9.11 Cafés/restaurants, the environment and atmosphere were positive aspects on balance. The availability of car parking spaces attracted mixed views, but car parking charges was a positive factor.
- 9.12 Overall, taking all aspects that attracted over 5% of comments, four aspects were viewed more positively, with six viewed negatively. These results indicate mixed views about Watton town centre. The proximity of the centre to friends or friends (not included in graph below) were the most liked attributes (12.2% and 12.0% respectively), followed by good cafés and restaurants (10.1%).

Figure 9.2 Positive and negative factors mentioned by visitors about Watton (% of all visitors)



Source: NEMS household survey (March 2025).

Customer activities and catchment area

- 9.13 The household survey results indicate 21.4% of study area respondents had visited shops, services or leisure facilities in Watton during the last year. Around half of these visitors to Watton live in the local area (Zone 4), but due to its central location, Watton also attracts reasonable numbers of visitors from other parts of the study area. These results suggest Watton performs well as a second-tier centre in the District.
- 9.14 Only 2.4% of households in the study area indicated that they do most of their non-food shopping in Watton, which is slightly higher than Swaffham (1.4%) and Attleborough (2.2%). In the local zone 16.6% of households do most of their non-food shopping in Watton. The main other destinations in this local zone were Norwich (11.4%), Dereham (8.4%) and Thetford 4.7%.
- 9.15 The breakdown of activities undertaken by visitors to Watton is shown and compared with the District average in Table 9.5. The survey results indicate that is a reasonably strong retail, food/beverage and leisure destination, albeit below the District averages.

Table 9.5 Activities carried out by visitors to Watton town centre (% of all visitors to each centre)

Activity	Watton	Average for all Centres
Shopping		
Non-food shopping	42.7	49.0
Food shopping	38.3	47.1
Visit the market	3.0	7.0
Window shop/browse	12.8	15.1
Click and collect	0.0	0.2
Leisure		
Go for a walk	7.4	6.5
Café/pub/restaurant	24.5	24.7
Leisure activity	8.4	9.2
Other services		
Banks/other financial institutions	8.7	7.8
Health facilities	7.8	9.4
Buying fuel	3.6	3.2
Post office	8.5	5.7
Library	2.2	1.9
Other services	3.0	6.4
Other activities		
Travelling to/from work	10.2	6.7
Education/school run	2.4	2.6
Visting family/friends	23.6	17.0

Source: NEMS household survey (March 2025).

* percentages add to more than 100% due to multiple activities.

9.16

The capacity analysis suggests Watton has a combined retail and food/beverage turnover of £97.83 million, which is predominantly food shopping. This combined turnover is the third highest of the five centres in the District.

Summary of Watton's strengths and weaknesses

Strengths

- The centre serves the day-to-day shopping and service needs of local residents, reflected by a higher-than-average convenience foodstore provision.
- The centre has an attractive historic environment with many period buildings providing a pleasant shopping environment.
- The centre has an wide selection of independent specialist retailers serving a niche retailer offer.
- Watton has a relatively low vacancy rate which suggests demand for premises is relatively strong, and the number of vacant units in the centre has remained broadly unchanged since the 2014 Study.

- The centre is relatively compact and easy to navigate.

Weaknesses

- There are very few large format units and the historic environment may limited the potential for redevelopment opportunities to meet this need.
- As 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.
- The main High Street is separated from the Tesco and Lidl stores, which does not encourage linked trips.
- Traffic along the High Street can act as a barrier to pedestrian movement.

10.0 Retail and food/beverage capacity

Introduction

- 10.1 This section assesses the quantitative and qualitative need for retail and food/beverage uses in Breckland District. The National Planning Policy Framework (NPPF) indicates that local planning authorities should positively seek opportunities to meet the development needs of their area, and Local Plans should meet objectively assessed needs. 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 and food/beverage (eating and drinking away from the home).

Assumptions and base data

- 10.2 All monetary values expressed in this study are at 2023 prices, consistent with Experian's base year expenditure figures for 2023, which are based on actual recorded expenditure levels rather than projections.

Study area zones

- 10.3 A household telephone survey was undertaken during February/March 2025. The primary catchment areas of some of the town centres extend beyond the District boundary, particularly to the southwest (from Thetford) and to the northeast (from Attleborough). The study area is shown in Appendix 1. This study area has been sub-divided into five zones based on postcode areas to reflect the primary catchment areas of the town centres in the District.
- 10.4 The projected population within each zone between 2025 to 2046 is set out in Table 1 in Appendix 2, sourced from Experian. The base year 2025 population within the study area is 182,661. This population is projected to increase to 194,768 by 2036, an increase of +12,107. Population is then projected to increase to 204,121 by 2046.

Retail expenditure

- 10.5 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 2023 have been obtained.
- 10.6 Experian's latest national expenditure information (Experian Retail Planner Briefing Note 22 – March 2025) has been used to forecast expenditure within the study area. Experian's short-term growth forecast rates during 2024, 2025 and 2026 reflect current economic circumstances, including Covid-19 and the cost-of-living crisis. The forecast changes during this period are as follows:
- convenience goods: -3.2%
 - comparison goods: +0.4%
 - leisure: -1.3%
- 10.7 These short-term forecasts reflect the on-going cost-of-living crisis during 2024. Convenience goods expenditure increased during the lockdowns with households eating out

less often than before the pandemic. Convenience goods expenditure is forecast to decline during 2024, 2025 and 2026. Comparison goods and leisure expenditure, including eating and drinking out, reduced significantly during the lockdowns. The leisure sector was projected to recover during 2022. The comparison good retail sector is expected to decline during 2022 and 2023.

- 10.8 In the longer-term it is more difficult to forecast year-on-year changes in expenditure. Experian's medium and long-term growth average forecasts have been adopted, as follows:
- convenience goods: -0.3% per annum growth between 2027 and 2031 and -0.2% per annum after 2031;
 - comparison goods: +2.5% per annum growth between 2027 to 2031 and +2.6% per annum after 2031; and
 - leisure: +0.6% per annum growth between 2027 to 2031 and +0.7% per annum after 2031.
- 10.9 These growth figures relate to real growth and exclude inflation. The current high levels of inflation should not affect Experian's long-term expenditure projections that are over and above inflation.
- 10.10 Experian's latest adjusted deductions for SFT (i.e. home and online shopping through non-retail businesses) in 2025 are:
- 5.2% of convenience goods expenditure; and
 - 24.1% of comparison goods expenditure.
- 10.11 Experian's projections suggest that these SFT percentages will increase to 6.4% and 26.9% in 2033 respectively. The long-term Experian projections suggest an increase to 7.3% and 29.3% in 2040 respectively.
- 10.12 Table 2 in Appendix 3 sets out the updated forecasts for spending per head on convenience goods within each zone in the study area up to 2046, excluding SFT/on-line sales through non-retail businesses. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.
- 10.13 Based on forecast changes in population and per capita spending (excluding SFT), total convenience goods spending within the study area is forecast to increase decrease by 4.1% from £510.97 million in 2025 to £532.04 million in 2046, as shown in Table 3 (Appendix 2).
- 10.14 Comparison goods spending is forecast to increase by +75.7% between 2025 and 2046, increasing from £549.01 million in 2025 to £964.45 million in 2046, as shown in Table 3 (Appendix 3).
- 10.15 Food and beverage spending is forecast to increase by +28.3% between 2025 and 2046, increasing from £271.62 million in 2025 to £348.54 million in 2046, as shown in Table 3 (Appendix 4).

Growth in Turnover densities

- 10.16 Experian's Retail Planner Briefing Note 22 – March 2025 indicates that comparison goods retail sales floorspace is expected to increase its average sales density by only +0.3% during 2024 to 2025, representing a slow recovery from the cost-of-living crisis, but higher growth is envisaged thereafter in the medium and long-term (+1.6% per annum in 2026 and +2.3% per annum beyond 2027). These recommended increases have been adopted and will absorb much of the future expenditure growth. These growth rates are consistent with the expected increase in on-line/home shopping through retail businesses i.e., the total sales of retail businesses will increase at a much higher rate than the amount of physical sales floorspace they provide.
- 10.17 For convenience goods retail, Experian indicates a decrease of -2.4% during 2024 to 2026 while no growth is envisaged in the medium term (2026 to 2031) before another gradual decline (-0.1% per annum) is predicted in sales densities thereafter.
- 10.18 Experian's Retail Planner Briefing Note 22 – Leisure, March 2025 provides projections for food/beverage use sales densities. Experian indicates a decrease of -2.3% during 2024 to 2025. Limited growth (+0.1% per annum) is envisaged in the medium and long-term (2026 to 2040).

Base year market shares

- 10.19 The turnover of facilities within Breckland District is estimated based on the market shares or penetration rates. To assess the capacity for new floorspace, penetration rates have been estimated for shopping and food/beverage facilities based on a household shopper survey undertaken in February/March 2025. The market shares for convenience goods and comparison goods shopping are shown in Table 4 in Appendix 2 and Table 4 in Appendix 3, respectively. The market shares for food and beverage expenditure are shown in Table 4 in Appendix 4.
- 10.20 The results of the household shopper survey regarding main and top-up food and grocery shopping have been used to estimate existing convenience goods shopping patterns. The market shares in Table 4 in Appendix 2 are a combined rate for both main and top up shopping based on a 70:30 split. The split between last main trip and other main trip is 50:20. These splits are based on Lichfields' experience and are widely accepted in retail studies of this kind. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 10.1.

Table 10.1 Food and grocery trip retention in Breckland District (% of all trips in each zone)

Zone	Main last trip	Main other trip	Top-up	Combined market share
1 – Thetford	74.9	69.2	63.9	70.5
2 – Dereham	84.4	80.2	82.8	83.1
3 – Swaffham	80.6	80.0	89.7	83.2
4 – Watton	95.5	85.4	96.7	93.8
5 – Attleborough	65.7	68.2	81.1	70.8

Source: NEMS household survey results March 2025

- 10.21 Breckland retains the highest share (93.8%) of convenience goods expenditure in Zone 4, because this zone is in the heart of the District. Expenditure retention is lower (70.5%) in Zone 1 – Thetford, where convenience goods expenditure is attracted to facilities in Brandon and Lakenheath. Expenditure leakage from Zone 2 – Dereham goes primarily to large food stores in Norwich. Expenditure leakage from Zone 3 – Swaffham is attracted to Fakenham and Kings Lynn and leakage from Zone 5 – Attleborough goes predominantly to Diss.
- 10.22 These figures indicate that most residents undertake their food and grocery shopping close to where they live albeit predominantly by car for main food shopping trips. The household survey results and distribution of food stores within and surrounding the study area suggest there may be limited potential for Breckland District to increase its market share of convenience goods expenditure in the future.
- 10.23 The market shares for comparison goods shopping in Table 4, Appendix 3 are based on a weighted average for each comparison goods category included within the household survey e.g. clothing/footwear, electrical, furniture, floorcoverings, DIY and health and beauty products. The survey results suggest lower levels of comparison goods expenditure retention for all goods categories in Breckland, as shown in Table 10.2. The market shares are also higher in the central parts of the District and much lower in the Swaffham and Attleborough zones.

Table 10.2 Non-food comparison trip retention (% of all trips in each zone – excluding internet shopping)

Zone	Clothing footwear	Domestic electrical	Other electrical	Furniture floor-covering textile	DIY hardware garden	Health beauty	Books stationery	Toys hobbies pets	Other non-food	Combined weighted
1 – Thetford	29.7	89.2	81.1	44.1	86.7	71.4	73.3	73.8	37.8	61.2
2 – Dereham	44.1	77.4	70.9	32.4	74.4	80.7	70.7	59.1	32.1	58.8
3 – Swaffham	18.3	44.1	34.1	15.9	48.6	57.5	63.7	58.5	30.0	38.3
4 – Watton	47.3	78.8	73.9	35.5	83.5	84.4	78.4	92.2	60.3	69.0
5 – Attleborough	20.2	74.1	52.5	30.7	72.2	38.6	54.5	56.6	20.0	42.4

Source: NEMS household survey results March 2025

- 10.24 The retention of comparison goods expenditure is generally lower for higher order goods e.g. clothing/footwear and furniture but higher for day-to-day goods e.g. health/ beauty, DIY/hardware and books/stationery.
- 10.25 The results of the household shopper survey regarding eating and drinking away from the home have been used to estimate existing food and beverage expenditure patterns. The market shares in Table 4 in Appendix 4 are a combined rate for both eating out and drinking at pubs/bars are based on an 80:20 split, based on Experian's local expenditure data. The survey results suggest reasonably high levels of expenditure retention within the study area, as shown in Table 10.3.

- 10.26 The survey results suggest lower levels of food/beverage expenditure market share than for convenience goods shopping, but similar to comparison goods shopping. The District's market shares are also higher in the central parts of the District and much lower in the Swaffham and Attleborough zones.

Table 10.3 Food and beverage trip retention in Breckland District (% of all trips in each zone)

	Eating out	Drinking away from home	Combined market weighted share
1 – Thetford	52.9	71.0	56.5
2 – Dereham	63.3	69.9	64.6
3 – Swaffham	43.2	62.9	47.1
4 – Watton	54.4	85.7	60.7
5 – Attleborough	48.7	56.2	50.2

Source: NEMS household survey results March 2025

Capacity for convenience goods retail floorspace

- 10.27 Based on the market shares calculated from the March 2025 household survey results, available convenience goods expenditure attracted to facilities in the District in 2025 is shown in Table 5 in Appendix 2. This expenditure has been projected forward to 2031, 2036, 2041 and 2046, and is summarised in Table 11 Appendix 2. Convenience goods expenditure available to facilities in the District is expected to increase from £427.63 million in 2025 to £444.86 million in 2046. This increase is due to population growth which will offset increases in special forms of trading (SFT deduced from available expenditure). A breakdown for facilities in the District is set out in Table 10.4.

Table 10.4 Convenience goods base year turnover in 2025 (household survey based turnover)

	Turnover £M
Thetford	127.23
Dereham	138.94
Swaffham	43.46
Watton	53.58
Attleborough	46.92
Other Breckland District	17.50
Total	427.63

Source: Table 11 in Appendix 2.

- 10.28 The benchmark turnover of the main food stores in the District is calculated in Table 10 in Appendix 2. The benchmark turnover is based on the sales area within each store and the respective company average sales densities. This turnover is not necessarily the actual turnover of the store, but it provides a useful benchmark to assess how well existing facilities are trading.

- 10.29 The combined benchmark turnover of identified food stores in the District is estimated to be £379.78 million. This benchmark turnover excludes small convenience good shops in the District. Nevertheless, these estimates suggest on average food stores in the District are trading healthily.
- 10.30 Table 11 in Appendix 2 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure that may be available for new development in the future. The expenditure surplus projections have been converted into floorspace estimates in Table 12 in Appendix 2 based on a combined approximate company average sales density of £12,845 per sq.m net of the main food store operators, as summarised in Table 10.5.

Table 10.5 Convenience goods floorspace capacity (sq.m gross) - cumulative

	2031	2036	2041	2046
Thetford	-	304	535	877
Dereham	-	320	521	827
Swaffham	-	38	64	107
Watton	-	128	210	338
Attleborough	-	164	262	407
Other Breckland District	-	42	68	108
Total	-	997	1,661	2,664

Source: Table 12 in Appendix 2.

Qualitative need

- 10.31 Food store provision in the District is set out in Table 10 in Appendix 3. Convenience goods sales floorspace in these main stores totals around 30,000 sq.m net. Collectively the five town centres in Breckland have 58 convenience goods outlets including food stores operated by multiple retailers and smaller independent shops.
- 10.32 Main shopping trips traditionally are generally made once a week or less often, although recently households have increasing undertaken top-up shopping trips. The availability of a wide range of products and free car parking are important requirements for bulk food shopping trips. Large food stores are the usual destination for these types of bulk food shopping trips.
- 10.33 There are three superstores which total over 2,500 sq.m net in the District: Tesco in Thetford, Tesco Extra in Dereham, and Morrisons in Dereham. The District features five Tesco supermarkets, two Sainsbury's, an Asda, a Morrisons and a Waitrose, which are also suitable for main and bulk food shopping. The discount sector is well represented in the District with Lidl stores located in and around all centres in the District with the exception of Swaffham, and Aldi stores in Thetford and Dereham.
- 10.34 These larger food stores are complemented by small convenience goods stores, including four Co-op stores, three Icelands, a Tesco Express and two Morrisons Daily stores ranging from about 150 to 900 sq.m net, which are suitable for top-up food and grocery shopping.

- 10.35 Residents in the District have excellent access to a range and choice of food stores and there are no obvious areas of deficiency in food store provision, which reflects the high expenditure retention rates highlighted in Table 5.1 in all zones in the District.

Capacity for comparison goods floorspace

- 10.36 Available comparison goods expenditure has been projected to 2031, 2036, 2041 and 2046 and is summarised in Table 10 in Appendix 3. Comparison goods expenditure available to facilities in the District is expected to increase from £319.27 million in 2025 to £561.27 million in 2046. A breakdown for facilities in each zone is set out in Table 10.6.

Table 10.6 Comparison goods base year turnover in 2025 (household survey based turnover)

	Turnover £M
Thetford	132.76
Dereham	112.54
Swaffham	17.23
Watton	31.56
Attleborough	19.54
Other Breckland District	5.74
Total	319.37

Source: Table 10 in Appendix 3.

- 10.37 The comparison goods turnover of all retail facilities in the District is estimated to be £319.37 million. About 77% of this turnover (£245.3 million) is estimated to be attracted to Thetford and Dereham as the main shopping destinations.
- 10.38 Table 10 in Appendix 3 subtracts the turnover of existing floorspace including an allowance for growth in turnover densities. The projections suggest future growth in available expenditure will be partially offset by expected growth in turnover densities i.e. existing retail businesses will absorb expenditure growth. This assumption is consistent with Experian's projected growth in non-store sales taken by retail businesses. The growth in retail operator's turnover densities will in part be fuelled by on-line sales and click and collect (from stores or collection points), which will not directly affect the need for additional retail sales floorspace. The deductions already made for SFT only relate to non-store sales through non-retail businesses.
- 10.39 In 2031 there is a projected small expenditure surplus of £6.03 million, increasing to £49.94 million in 2046. These projections suggest growth in turnover densities will not absorb all future expenditure growth. The surplus expenditure projections have been converted into floorspace estimates Table 11 in Appendix 3. The results are summarised in Table 10.7.

Table 10.7 Comparison goods floorspace capacity (sq.m gross) - cumulative

	2031	2036	2041	2046
Thetford	439	969	1,572	2,792
Dereham	387	791	1,229	2,160
Swaffham	40	74	113	213
Watton	105	226	350	619
Attleborough	90	179	277	470
Other Breckland District	20	40	63	111
Total	1,081	2,279	3,603	6,365

Source: Table 11 in Appendix 3.

Qualitative need

- 10.40 Collectively the five town centres in the District have 164 comparison goods outlets. This includes a mix of national multiples and small independent shops. There is further provision on the retail parks and the local service centres in the District.
- 10.41 The District has a limited selection of retail warehouses and quasi-retail uses including Breckland Retail Park, Forest Retail Park, and other facilities along London Road to the west of Thetford. Collectively Breckland's centres have a reasonable range and choice of comparison goods outlets, but the leakage of higher order comparison goods expenditure to larger shopping destinations is relatively high, particularly Norwich, and to a lesser extent Bury St Edmunds, and Kings Lynn. Overall, the accessibility for residents in the District to a range and choice of comparison goods shopping destinations is reasonable, taking into account the overlapping catchment areas and the proximity of Norwich.

Capacity for food/beverage floorspace

- 10.42 Available food and beverage expenditure has been projected forward to 2031, 2036, 2041 and 2046, and is summarised in Table 10 in Appendix 4. The amount of expenditure attracted to the District is expected to increase from £165.27 million in 2025 to £212.13 million in 2046. A breakdown for facilities in each zone is set out in Table 10.8.

Table 10.8 Food and beverage base year turnover in 2025 (household survey based turnover)

	Turnover £m
Thetford	52.25
Dereham	48.52
Swaffham	8.29
Watton	6.95
Attleborough	16.52
Other Breckland District	32.74
Total	165.27

Source: Table 10 in Appendix 4.

- 10.43 Table 10 in Appendix 4 subtracts the turnover of existing floorspace from available expenditure to calculate the amount of surplus expenditure available for new development. In 2031 there is an expenditure surplus of +£11.11 million. Continued expenditure growth creates an expenditure surplus of +£43.36 million in 2046. Floorspace capacity projections are shown in Table 11 in Appendix 4 and summarised in Table 10.9 below.

Table 10.9 Food and beverage floorspace capacity (sq.m gross) - cumulative

	2031	2036	2041	2046
Thetford	573	1,123	1,691	2,289
Dereham	542	1,035	1,531	2,043
Swaffham	85	158	230	300
Watton	78	151	223	299
Attleborough	198	378	565	763
Other Breckland District	364	698	1,034	1,383
Total	1,840	3,543	5,274	7,077

Source: Table 10 in Appendix 4.

Qualitative need

- 10.44 Collectively the five town centres in the District have 127 food/beverage outlets, which provide a good range and choice of outlets made up of 68 restaurants/cafés, 20 pubs/bars, and 39 hot food takeaways..
- 10.45 As indicated in Sections 4-9, Attleborough, Swaffham and Watton have the strongest provision of outlets serving the evening economy and the District's main centres have a good provision of restaurant/cafés and hot food takeaways, but the provision of pubs/bars are below the national averages. Overall, residents in the District have access to a reasonable range and choice of food/beverage outlets.
- 10.46 The household survey results indicate higher levels of satisfaction than dissatisfaction with the provision of cafés/restaurants in the town centres (11.0% compared with 4.3%, or +6.6% net). The highest levels of satisfaction were recorded in Dereham (12.6%) whilst the highest levels of dissatisfaction were recorded in Watton (6.2%) and Thetford (5.9%).
- 10.47 The household survey results indicate more mixed views regarding pub/bar provision, with closer levels of satisfaction (2.0%) and dissatisfaction (1.3%). The highest levels of both satisfaction (5.1%) and dissatisfaction (3.7%) were recorded in Watton, indicating a low level of expectation across the majority of centres.

Operator space requirements

- 10.48 The Requirements List publishes potential space requirements for multiple retail and food/beverage operators. The current (April 2025) list of operators whose published information suggest they may have space requirements in Breckland is limited with only five retail and food/beverage operators, as follows.
- East Anglia Children's Hospices charity shop for: 1,200 – 8,000 sq.ft in Swaffham
 - Savers health/beauty for: 2,000 – 3,000 sq.ft in Attleborough

- KFC fast food for: 1,200 – 2,500 sq.ft in Thetford
- Taco Bell fast food for: 1,800 – 2,500 sq.ft in Thetford
- Wendy's fast food for: 1,200 – 4,500 sq.ft in Thetford.

11.0 Leisure, entertainment and cultural uses

Introduction

- 11.1 This section assesses the need for other main town centre uses including commercial leisure, entertainment and cultural uses i.e. cinema/multiplex, tenpin bowling, bingo, theatres, nightclubs and private health and fitness clubs. Main town centre uses, as defined within the NPPF glossary, exclude less intensive sports and recreation uses such as swimming pools, sports halls and sports pitches, and therefore the need for these uses has not been assessed in this study.
- 11.2 Residents in the District have a reasonable range of commercial leisure and entertainment uses within the authority area and within neighbouring authorities. Access to facilities in Norwich and Bury St Edmunds also provides additional opportunities for leisure, entertainment and cultural trips.

Leisure, entertainment and cultural expenditure

- 11.3 Experian's projections and local expenditure data for the household study area indicates the resident population generates £48.52 million in 2025 (an average of about £266 person) on selected cultural, recreational and sporting services, including:
- cinema admissions £1.29 million;
 - live entertainment i.e. theatre/concerts/shows £6.04 million;
 - museums, theme parks, houses and gardens £4.07 million;
 - admissions to clubs, dances, discos, bingo £4.28 million;
 - other miscellaneous entertainment £2.33 million;
 - subscriptions for leisure activities £5.07 million;
 - subscriptions to sports and social clubs £12.96 million; and
 - leisure class fees £12.47 million.
- 11.4 Table 2 in Appendix 5 sets out the updated forecasts for spending per head on leisure, entertainment and cultural activities in each zone in the study area up to 2046. Average convenience goods expenditure is expected to reduce due to a higher proportional increase in SFT. Forecasts for comparison goods spending per capita are shown in Table 2 in Appendix 4 and food/beverage expenditure is shown in Table 2 in Appendix 5.
- 11.5 Leisure, entertainment and cultural expenditure has been projected to 2046 adopting Experian's recommended leisure expenditure growth rates (Retail Planning Briefing Note 22 – March 2025). Taking population changes into account leisure expenditure is projected to increase by 28.4% from £48.52 million in 2025 to £62.28 million in 2046.
- 11.6 Not all leisure/cultural expenditure from study area residents is spent in Breckland. The household survey results have been adopted to estimate the household participation rates and the retention of leisure trips within the study area, as shown in Table 11.1. Around 15% of households do not participate in any of the nine leisure activities explored by the household survey.

- 11.7 The participation and retention rates vary significantly for each leisure activity. Many residents travel outside the study area for leisure activities e.g. to Norwich, Bury St Edmunds and nearby smaller centres such as Brandon, Diss and Fakenham.

Table 11.1 Leisure, entertainment and cultural participation and trip retention (% of households in the study area)

Activity	% study area households participating	% trips attracted to Breckland District
Cinema	50.2	53.7
Theatre	33.2	3.9
Nightclubs / live music venues	18.3	20.9
Bingo	11.8	73.1
Gyms / health and fitness club	24.9	63.5
Tenpin bowling / gaming	20.3	48.5
Indoor / soft play	9.4	67.1
Trampoline parks	7.2	0.0
Museums / art galleries	21.8	25.0

Source: NEMS household survey results March 2025

- 11.8 The retention rate is highest for trips to bingo (73.1%), indoor/soft play (67.1%) and health/fitness facilities (63.53%) but very low for theatres (3.4%) and museums/galleries (25%). For trampoline parks there is a zero retention rates, accompanied by a low participation rate, suggesting that a lack of local provision may be limiting involvement. The results for theatres and museums/galleries suggest that households are prepared to travel further for these activities.
- 11.9 Norwich is the main destination for three leisure activities, attracting 79.8% of households to its trampoline parks; 61.7% to its theatres and 34.7% to its nightclubs/live music venues and 31.5% to its museums/galleries. Destinations within Breckland were the most popular choice for the cinema, bingo, indoor soft play, tenpin bowling and gyms.
- 11.10 The results of the household survey regarding leisure activities have been used to estimate existing leisure expenditure patterns. The market shares in Table 4 in Appendix 5 are a combined rate for the activities listed in Table 11.1 based on Experian's local expenditure data.
- 11.11 Available leisure, entertainment on cultural expenditure has been projected forward to 2031, 2036, 2041 and 2046, and is summarised in Table 10 in Appendix 5. The amount of expenditure attracted to the District is expected to increase from £25.99 million in 2025 to £33.37 million in 2046. A breakdown for facilities in each zone is set out in Table 11.2.

Table 11.2 Food and beverage base year turnover in 2025 (household survey based turnover)

	Turnover £M
Thetford	8.01
Dereham	10.49
Swaffham	1.32
Watton	3.74

	Turnover £M
Attleborough	2.43
Total	25.99

Source: Table 10 in Appendix 4.

11.12 Table 10 in Appendix 5 subtracts the turnover of existing facilities from available expenditure to calculate the amount of surplus expenditure available for new development. In 2031 there is a small expenditure surplus of +£1.76 million. Continued expenditure growth creates an expenditure surplus of +£6.84 million in 2046.

11.13 Based on Lichfields' experience, leisure floorspace normally trades on average around £2,500 per sq.m gross, which is projected to increase to £2,528 per sq.m gross in 2036 and then to £2,553 per sq.m in 2046, based on Experian's projected growth in leisure sales densities. Floorspace capacity projections are shown in Table 11 in Appendix 5 and summarised in Table 11.2 below.

Table 11.3 Leisure, entertainment and cultural floorspace capacity (sq.m gross) - cumulative

	2031	2036	2041	2046
Thetford	215	419	629	852
Dereham	280	534	790	1,054
Swaffham	32	60	87	113
Watton	100	195	289	388
Attleborough	70	135	200	270
Total	698	1,342	1,996	2,677

Source: Table 10 in Appendix 5.

11.14 This analysis provides a broad brush global floorspace capacity analysis and assumes Breckland will continue to retain, as a minimum, the current proportion of leisure expenditure within the study area. A more detailed sector by sector assessment is set out in the remainder of this section.

Cinemas

11.15 Cinema admissions in the UK reached a peak of 1.6 billion trips in 1946. However, the number of trips 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 dropping to only 54 million trips in 1984 but increased steadily after 1984 up to 2002. There was a peak in cinema admissions in 2002 at 175.9 million. Total admissions reduced to 157.5 million in 2014 but increased slowly to 176 million in 2019 (Source: British Film Institute). Cinema trips have not increased significantly since 2002, despite population growth of 9.6% during this period (59.4 million to 66.6 million). The national average visitation rate was about 2.6 trips per person per annum, before the Covid crisis.

11.16 The number of trips during the Covid-19 crisis reduced significantly. The latest 2024 figures indicate 126.5 million cinema trips were made in the UK (about 1.8 trips per person), still 28% below pre-Covid levels (176 million). The cinema assessment for Breckland assumes trip levels comparable with the latest UK average i.e. 1.8 trips per person per annum.

- 11.17 The UK Film Distributors' Association identifies 977 cinema facilities with 4,578 screens in the UK in 2023. Lichfields' national CINESCOPE model assesses the provision of cinema screens against projected customer cinema trips across the country, to identify areas of under and over-provision. The national average (based on pre-Covid trips rates) was about 38,000 cinema trips per annum for each cinema screen.
- 11.18 The study area population is 182,661 in 2025, which based on the pre and post Covid national averages above, would generate between 328,800 to 474,900 cinema trips. These trips can theoretically support between 9 and 12 cinema screens. However, not all cinema trips will be attracted to facilities in Breckland. Cinemas surrounding the District attract a significant number of trips, and Breckland's theoretical cinema capacity will be lower.
- 11.19 There are only two cinema facilities in the District, at Dereham and Thetford with six screens and 551 seats. The Orion cinema in Dereham has three screens with 300 seats, and the Light cinema in Thetford has three screens with 251 seats. The household survey results suggest Breckland retains just under 54% of all trips in the study area (18.2% to Dereham and 35.3% to Thetford). This market share equates to between 177,500 to 256,400 cinema trips, which in theory can support between five to seven screens.
- 11.20 There is significant cinema provision in Norwich and Bury St Edmunds. Cinema destinations attracting significant visits according to the household survey are set out in Table 11.4.

Table 11.4 Cinema provision in surrounding authorities

Cinema	Capacity	% study area market share
Odeon, Norwich	18 screens (2,979 seats)	11.8
Vue, Norwich	8 screens (1,853 seats)	14.1
Cineworld, Bury St Edmunds	8 screens (1,472 seats)	4.2
Cinema City, Norwich	3 screens (353 seats)	2.1
Central Cinema, Fakenham	3 screens (360 seats)	2.8
Majestic Cinema, Kings Lynn	4 screens (596 seats)	5.1

Source: Ukinemas.org; NEMS household survey results January 2025.

- 11.21 Population within the study area is projected to increase from 182,661 to 204,121 by 2046. The population estimate at 2046 is projected to generate between 367,400 to 530,700 cinema trips, based on the national averages above (1.8 to 2.6 trips per person per annum).
- 11.22 If Breckland continues to retain 54% of cinema trips then population in 2046 could support five to seven screens. The higher figure suggests only one more screen could be supported. Existing cinema provision within the surrounding area may limit operator demand for a new facility in the study area. Furthermore, the longer-term impact of Covid-19 and growth

in home viewing on the number of cinema trips may reduce this theoretical capacity if the average visitation rate does not return to the pre-Covid UK average of 2.6 trips per person.

Theatres, nightclubs, live music and other cultural activities

- 11.23 The household survey results indicate 33.2% of respondents in the study area visit theatres. Around 21.8% visit museums/art galleries and about 18.3% visit nightclubs/live music venues.
- 11.24 The Theatre Trust estimates there are over 1,100 active theatres in the UK, which is on average around one venue per 62,000 people. Experian expenditure data suggests £3.5 billion was spent by UK residents on live entertainment (i.e. theatres, concerts and shows) in 2023, which is about £52 per person. Total live entertainment expenditure was around £3.2 million per theatre venue in the UK in 2023, based on the theatre Trusts estimate (1,100 venues).
- 11.25 Experian's local expenditure data indicates the Breckland study area generates £6.04 million on live theatre, concerts and shows. By 2046 this expenditure is projected to increase to £7.75 million. Assuming the national average expenditure per venue (£3.2 million) these figures suggest there is capacity for not more than two venues in the study area up to 2046.
- 11.26 The household survey results suggest the District attracts less than 4% of theatre trips, with limited expenditure retained within Breckland. Norwich is the most popular destination, attracting almost 55% of participating households. Relatively high numbers are also drawn to the theatres in London, Kings Lynn and Bury St Edmonds. Despite the low market share within the study area, two theatre venues in the District were mentioned by household survey respondents:
- The Carnegie, Thetford
 - Dereham Memorial Hall.
- 11.27 The existing provision is above the theoretical demand generated by the study area, based on the current low market share of less than 4%. This low market share suggests a high proportion of theatre trips to the theatre venues in Breckland come from people living beyond the study area. Nevertheless, projected expenditure growth and the low market share suggest there is limited potential for new theatre facilities in the District.
- 11.28 The nightclub sector has struggled in recent years and has been significantly affected by the Covid pandemic. Even before Covid-19, IBISWorld (providers of global industry research) suggested these venues have lost their competitive advantage over pubs and bars, with lower prices and a more relaxed atmosphere. Approximately one-quarter of nightclubs have closed in the past decade as operators have struggled to respond to new challenges from regulation, licensing, planning, business rates and policing.
- 11.29 The household survey results suggest 18.3% of households visit nightclubs/music venues and of these participating households only 20.9% are attracted to facilities in the District.
- 11.30 Experian suggests leisure expenditure on admissions to clubs, dances, discos etc is £4.28 million in 2025 in the Breckland study area. This relatively low level of expenditure and good access to nightclub/live music venues in Norwich (attracting 34.8% of participating

households) are likely to limit demand for additional facilities in the District. Significant numbers are also attracted to London (9%), Bury St Edmunds (6%) and Kings Lynn (5%).

- 11.31 Experian's local expenditure data indicates the Breckland study area generates £4.07 million on museums, theme parks, houses and gardens in 2025, which is projected to increase to £5.22 million in 2046, an additional £1.15 million.
- 11.32 The household survey results suggest around 22% of households visit museums/ art galleries, but only 25% visited locations in Breckland, including the Ancient House Museum and Dads Army Museum in Thetford, Gressenhall Farm & Workhouse in Beetley and Swaffham Museum. Norwich Castle and London were the most significant destinations.
- 11.33 The analysis above suggests there is no clear qualitative or quantitative need for additional theatre, music/nightclub or cultural provision in Breckland. However, there may be potential to increase the District's market share and attract more demand from tourist visitors if provision is improved.

Health and fitness clubs

- 11.34 The NPPF glossary indicates that some more intensive sport and recreational uses are included as main town centre uses. Indoor sports halls, swimming pools, pitches and courts are not considered to be intensive sport and recreational uses and are not main town centre uses. This section only assesses commercial health and fitness gyms and does not include sports halls.
- 11.35 The 2019 State of the UK Fitness Industry Report revealed that the UK health and fitness industry was continuing to grow pre-Covid. In 2019 there were more than 10.4 million fitness members in the UK and the industry was worth £5.1 billion, with a participation rate of 15.6%. The number of members dropped to 9.9 million in 2022, with a participation rate of 14.6% compared with 15.6% in 2019. The number of gym clubs dropped by 176 between 2019 to 2022. However, the latest 2024 UK Fitness Industry Report suggests a post-Covid recovery. The number of gym members was 10.7 million in 2024, a participation rate of 15.9% and the market value was £5.9 billion, which exceeds all pre-Covid levels. The household survey results indicate 24.9% of households visit health and fitness gyms, which is higher than the national average participation rate%.
- 11.36 The Sport England/Active Places data indicates that there are 16 registered health and fitness facilities in Breckland District, with 801 fitness stations, as shown in Table 6.3.
- 11.37 The current population in the Breckland study area is 182,661. The household survey results suggest the District attracts about 64% of gym trips from households in the study area, equating to a catchment population of about 117,000 in 2025. Based on this current estimated catchment population there is an average of 6.8 fitness stations per 1,000 people. The catchment population is projected to increase from 117,000 in 2025 to about 130,000 in 2046.
- 11.38 Within the East of England region there are 811 Sport England registered health and fitness facilities with 52,879 fitness stations (average of 65 stations per facility). This existing provision equates to about 8.1 fitness station per 1,000 people across the region, which is higher than the 6.8 fitness stations per 1,000 people in Breckland District.

Table 11.5 Health and fitness facilities in Breckland

Facility	Number of fitness stations	Type of access
Nuffield Health (Long Ditton)	80	Registered Membership use
St Georges Hill Lawn Tennis Club	45	Registered Membership use
Colets Health & Fitness Club	67	Registered Membership use
Pavilion Sports & Fitness Club	76	Registered Membership use
Riverside Gymnasium	13	Registered Membership use
Sandown Sports Club & Ski Centre	50	Registered Membership use
Body Concept, Thetford	61	Registered Membership use
NR Health and Fitness, Attleborough	40	Registered Membership use
Swaffham Leisure Centre	34	Pay and Play
Breckland Leisure Centre, Thetford	65	Pay and Play
Dereham Leisure Centre	75	Registered Membership use
Watton Sports Centre	25	Registered Membership use
Attleborough Sports Hall	10	Pay and Play
Wayland Academy, Watton	7	Private Use
HMP Wayland, Griston, Thetford	35	Private Use
Amazon Gym, Shropham, Attleborough	65	Pay and Play
Northgate High School, Dereham	9	Sports club / Community assoc.
Snap Fitness, Thetford	200	Registered Membership use
Fred Nicholson School,	15	Private Use
NR Health and Fitness, Dereham	60	Registered Membership use
NR Health and Fitness, Watton	75	Registered Membership use
Dereham Neatherd High School, Dereham	25	Private Use
Total	801	

Source: Sport England 2025.

11.39 The lower provision in Breckland may be due to the demographic profile and lower participation rates. If Breckland's provision remains at 6.8 stations per 1,000 people, then the demand for fitness stations could increase from 801 to 848 stations by 2036, and then to 888 stations by 2046, due to population growth. The +47 station increase by 2036 could support one medium sized facility. The increase to 2046 (+87 stations by 2046) could support two medium sized facilities.

11.40 However, if the average increased to 8.1 fitness station per 1,000 people, in line with the regional average, then there could be scope for an additional +257 stations by 2046 about four medium sized facilities or two large facilities.

Tenpin bowling and other indoor leisure innovations

11.41 Across the county repurposed space in town centres has provided new opportunities for new leisure innovations. Vacated premises have been reconfigured and reused for trampolines, climbing, indoor golf, escape rooms etc. These and other innovations are likely

to continue in the future because landlords will adopt a flexible approach to respond to arising opportunities.

- 11.42 The household survey results indicate 20.3% of households visit ten-pin bowling/ gaming facilities, and 48.5% of these participating household visit facilities in Breckland District. Strikes Bowl in Dereham is the main destination in the District with 10 lanes. Other tenpin bowling destination mentioned by household survey respondents were:
- Hollywood Bowl, Norwich (14.6%);
 - Mr G's Bowling Centre, Brandon (10.7%); and
 - Namco Funscape, Norwich (4.2%).
- 11.43 The Breckland study area's future 2046 population (204,121) can theoretically support 17 lanes, based on the national average of one lane per 12,000 people. Currently, the District retains less than half of this demand, which implies Strikes Bowl's ten lanes are sufficient to meet demand.
- 11.44 Indoor trampoline centres are a relatively new leisure activity in the UK. In America outdoor trampoline centres were popular in the late 1950s and 1960s. This has been adopted and modernised and is now becoming a popular indoor leisure activity for a variety of age groups in the UK. The UK's first indoor trampoline centre was opened by Bounce in 2014.
- 11.45 Trampoline and soft play centres offer a new, recreational experience for both children and adults. They typically have over 100 interconnected trampolines on site, consisting of differing courts including a Main Arena, Dodgeball Court, Kids Court, Slam Dunk Area, Foam Pit, Airbag Jump, Touch Walls, Gladiator Pits and Tumble Tracks, as well as an arcade and party rooms.
- 11.46 The household survey results indicate only 7.2% of respondents in the study area visit trampoline centres and 9.4% visit indoor soft play facilities. For the latter, Breckland attracts a fairly high share (67%) of participating households in the District.
- 11.47 The main trampoline destinations mentioned by households participating in this activity were:
- Gravity, Riverside Entertainment Centre, Norwich (62.9%);
 - Jump Warehouse, Diss (13.9%);
 - High Altitude Trampoline, Norwich (6.6%).
- 11.48 The main indoor/soft play destinations mentioned by households participating in this activity were as follows:
- Fun 2 Play, Thetford (34.7%);
 - Farmer Fred's Adventure Play Barn, Heacham, King's Lynn (5.8%);
 - ROARR!, Norwich (5.4%);
 - Jump Warehouse, Diss (4.2%); and
 - The Wonder Wood, Watton (2.4%).

- 11.49 Overall, there may be potential scope for further provision of these types of leisure facilities in the District. These relatively new innovations are still evolving and the potential for continued growth is unclear. Participation levels based on the household survey are relatively low in comparison to other leisure activities. The strategy for the District should be flexible to respond to any emerging demand from leisure operators.

Bingo, games of chance and gambling

- 11.50 Gala (now Buzz Bingo) and Mecca 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. The bingo sector usually prefers central locations that are accessible by public transport and by foot. However, the significant increase in on-line gambling has, and will continue to affect this sector.
- 11.51 The Gambling Commission indicates the number of bingo premises fell by over 15% between 2014 to 2020, due in part to the increase in on-line bingo. The Gambling Commission latest figures indicates the UK currently has:
- 582 bingo halls;
 - 175 casinos;
 - 1,405 adult gaming centres;
 - 191 family entertainment centres; and
 - 6,661 betting shops.
- 11.52 This equates to approximately one bingo facility per 93,000 adults, one casino per 310,000 adults and one family entertainment centre per 280,000 adults.
- 11.53 The household survey results indicate 11.8% of respondents in the study area visit bingo facilities, significantly higher than the UK average participation rates of around 5%. Breckland attracts most (73%) of these participating households. The main bingo destinations mentioned by households participating in this activity were as follows:
- Winners Bingo, Thetford (23.9%); and
 - Mecca Bingo, Norwich (10.7%).
- 11.54 The adult population in the Breckland study area (about 148,000 in 2025) is theoretically capable of supporting 1.6 bingo facilities and less than one casino, based on the UK averages. Considering the District's high participation rate (11.8%), there could be scope for an additional bingo facility in the north of the District. However, the continued growth in online bingo and gambling and provision in surrounding authority areas are likely to restrict operator demand in the District.

Conclusions on commercial leisure and other town uses

- 11.55 The leisure, entertainment and cultural sectors are fragmented and innovative. There are many activities that could be promoted to capture more expenditure within the District e.g. live music, nightclubs, and cultural activities. The analysis suggests the scope for some

traditional leisure activities often found in town centres may be limited e.g. cinemas and theatres and nightclubs, but new emerging leisure activities such as escape rooms and virtual golf centres should provide more potential. The representation of these emerging uses is likely to increase. Given the fragmented nature of these leisure sectors, it is difficult to precisely quantify the potential demand for these uses over the next 15 years.

11.56 In global terms future leisure expenditure growth could support new commercial leisure and cultural floorspace (cumulative) in the District of:

- about 700 sq.m by 2031;
- about 1,300 sq.m by 2036;
- about 2,000 sq.m by 2041; or
- about 2,700 sq.m by 2046.

11.57 This additional floorspace could include:

- up to two large or four medium sized health and fitness facilities;
- a bingo facility in the north of the District;
- new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
- small scale tourist attractions/cultural facilities.

11.58 The development strategy should be flexible to respond to emerging opportunities for new leisure, entertainment and tourist related facilities. The opportunities to reoccupy vacated retail space should be considered.

12.0 Hotel assessment

Overview

- 12.1 This section examines the prospects for growth in the hotel sector in Breckland District. The analysis examines the existing supply of accommodation and national trends.
- 12.2 The Strategic Review of Tourism Services prepared for the Council in November 2023 indicates
- 12.3 Breckland benefits from unique rural tourism assets including natural landscape and nature reserves (The Brecks) with associated trails, attractions and events as well as a variety of ancient ruins and historic houses/ museums, and market towns. The District also benefits from its proximity to well-known tourism destinations including Norwich, Bury St Edmunds and Cambridge, as well as the coastline.

Hotel Supply in Breckland

- 12.4 CoStar identified 29 hotels or inns within and on the outskirts of Breckland, providing 553 rooms, as shown in Table 12.1.

Table 12.1 Current hotel supply in Breckland

Standard	Hotels	Rooms	% of rooms
Economy	5	221	40%
Midscale	4	79	14%
Upper Midscale	7	91	16%
Upscale	12	147	27%
Upper Upscale	1	15	3%

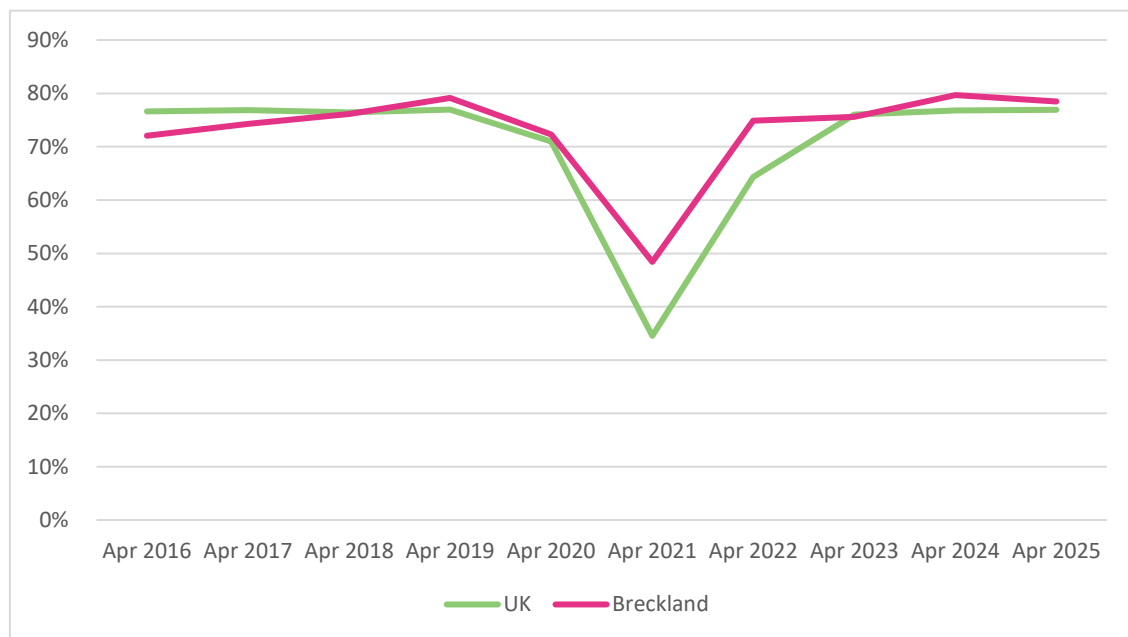
Source: CoStar

- 12.5 Notably CoStar also identifies the recent closure of the Hare & Barrel Hotel in Watton, which is categorised as Midscale and features 16 rooms, as well as the planned 125 rooms at the Snetterton Innovation Park Hotel due to open 2026).

Hotel room occupancy rates and revenue

- 12.6 Monthly (April) hotel room occupancy rates for Breckland are shown in Figure 12.2, compared against the UK average for the last decade. The average occupancy rate across the UK through to 2019 was about 77%, while occupancy in Breckland increased from 72% in 2016 (below the UK average) to 79% by 2019 (above the UK average).
- 12.7 The average occupancy rate fell significantly to a low of 35% in 2021 across the UK due to Covid lockdowns and the reduction in inbound international visitors, whilst Breckland's hotels were slightly more resilient with the lowest occupancy rate of 48%.
- 12.8 These latest hotel occupancy rates for 2023 to 2025 suggest a return to pre-Covid (2019) levels of demand with a UK average of 77% and a Breckland average of 80% in 2024, falling slightly yet remaining above the UK average at 78% in 2025.

Figure 12.1 Changes in hotel room occupancy in UK & Breckland (%)

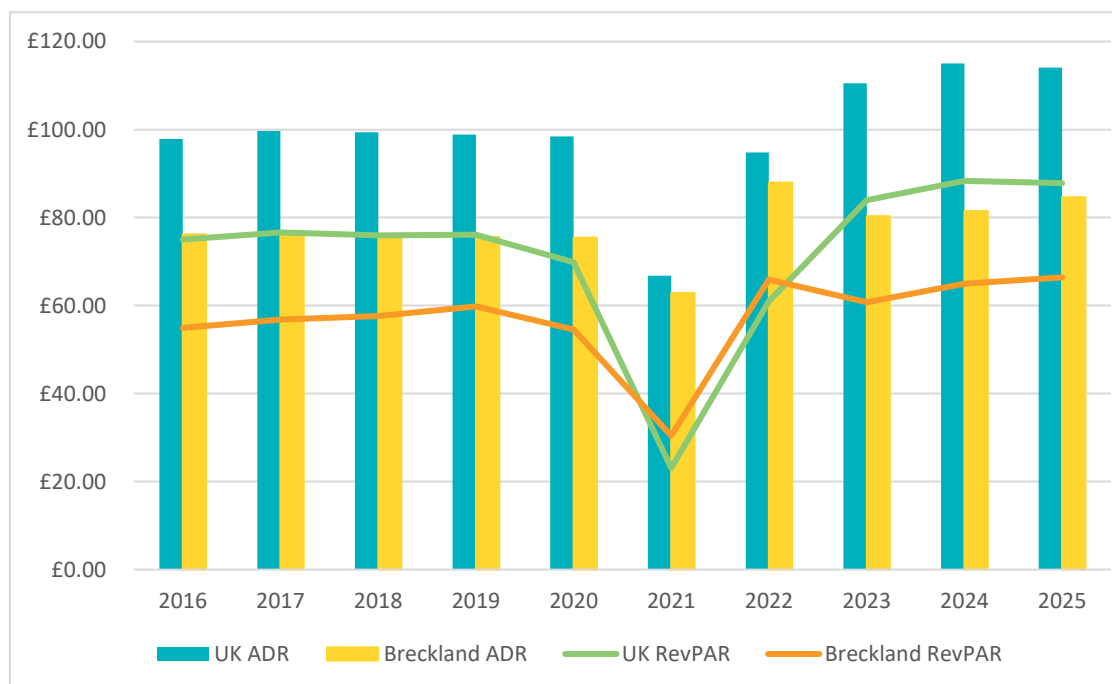


Source: CoStar

12.9

Average Daily Rate (ADR) is a measure of revenue for occupied hotel rooms and Revenue Per Available Room (RevPAR) sets out the overall hotel performance by directly accounting for occupancy. Figure 12.3 shows a recovery to pre-Covid levels of demand.

Figure 12.2 ADR and RevPAR in UK & Breckland (£)



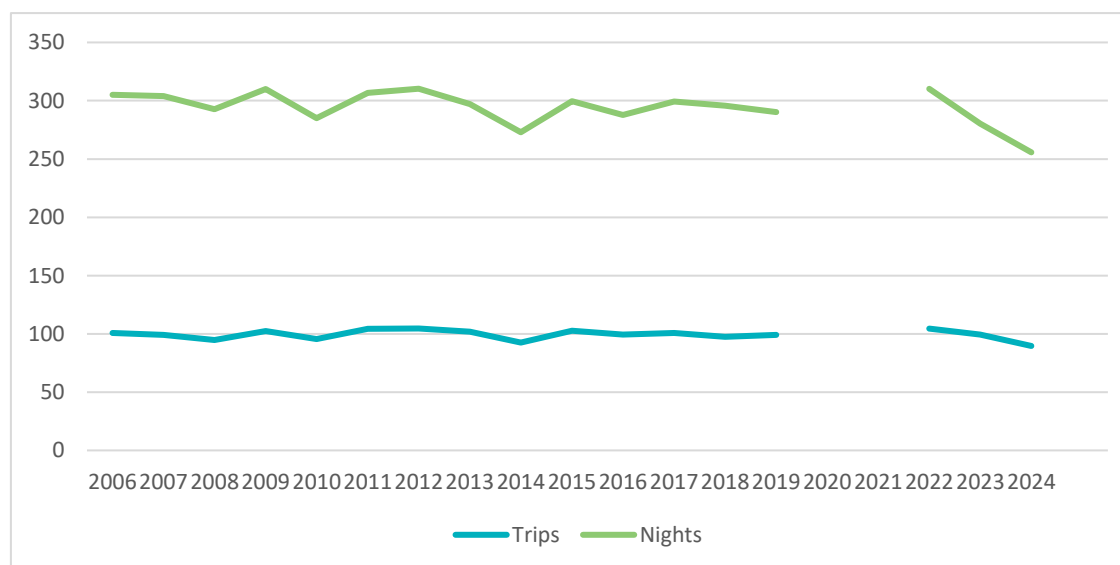
Source: CoStar

- 12.10 Notably, Breckland's hotels recovered at a faster rate than the UK average due to a particularly strong performance in 2022, with RevPAR having settled above pre-Covid levels with early signs of continued growth and efficiencies.
- 12.11 Based on an average bed occupancy rate of 77% during the year, the current supply of hotels and inns could accommodate about 155,500 bed nights per annum.

Domestic overnight trips

- 12.12 The latest available pre-Covid Visit England data available at local authority level indicates that the number of domestic overnight visitor trips across England was 99.0 million in 2019, which generated 295.2 million nights (2.99 bed nights per trip). The District attracted 217,000 domestic overnight visitor trips in 2019, with an average length of stay of 2.96 nights per trip, i.e. about 642,000 bed nights. Breckland's market share of domestic bed nights in England was only 0.22%. No more recent data is available for Breckland. However, recent data for England provides an indication of more recent trends.
- 12.13 In England, the number of visitor bed nights increased to 104.5 million trips and 310.2 million bed nights in 2022, the post Covid-19 peak. However, the latest available data indicates the number of domestic overnight visitor trips fell back to 99.4 million and 280.3 million bed nights in 2023, and again to 89.6 million and 255.7 million bed nights in 2024, an average of 2.85 nights per visitor trip.
- 12.14 The East of England's market share of all domestic overnight trips was 10.8% in 2024 (9.7 million trips). Small towns and countryside/village destinations accounted for 39.7% of domestic trips made to England in 2024 and serviced accommodation hosted 44.9% of all trips. Most of the domestic trips in 2024 were holidays (29.9 %) and visiting friends/relatives (37.7%). Business trips accounted for 5.5% of trips.
- 12.15 Pre-Covid data indicates the number of domestic trips and bed nights in England remained relatively stable between 2006 and 2019, at around 100 million trips generating around 300 million bed nights per annum, as shown in Figure 12.3.

Figure 12.3 Domestic overnight trips and bed nights in England (millions)



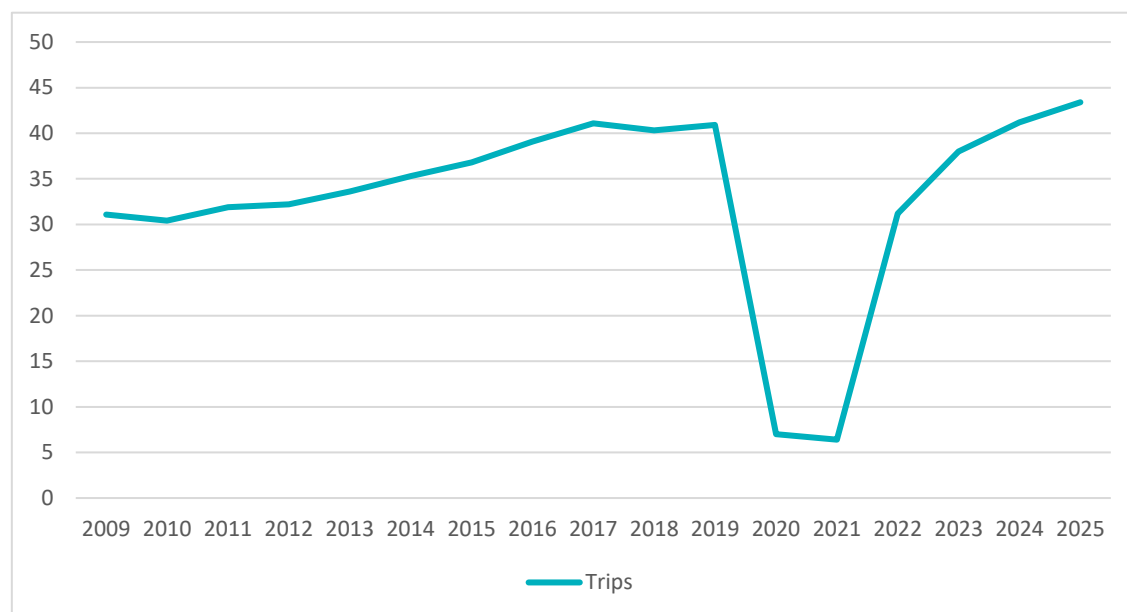
Source: Visit England

- 12.16 Recent and historic trends suggest the number of domestic overnight trips are unlikely to increase significantly in the future and may actually be in the process of falling from an initial post-Covid boost. However, the datasets coincide with the cost-of-living crisis, higher levels of inflation and overall reductions in spending and consumer confidence which would suggest that it is too early to draw any firm conclusions from the past three years. Equally, forecast increases in domestic population growth could generate additional demand.
- 12.17 Experian suggests population in England is projected to increase by 3.1% between 2023 and 2031, or by 4.9% up to 2036 and by 6.5% by 2041. If the number of domestic visitor nights increased in line with population growth, then the following additional bed nights could be generated (proportion of serviced accommodation set out in brackets, based on 45% of total nights):
- By 2031 8.8 million additional bed nights (4.0 million)
 - By 2036 13.6 million additional bed nights (6.1 million)
 - By 2041 18.3 million additional bed nights (8.3 million)
- 12.18 If Breckland can attract its current market share (0.22%) of England's domestic bed nights, then the following additional bed nights could be generated by population growth:
- By 2031 19,400 additional bed nights (8,700 serviced accommodation)
 - By 2036 30,000 additional bed nights (13,500 serviced accommodation)
 - By 2041 40,250 additional bed nights (18,200 serviced accommodation)
- 12.19 As highlighted above, the occupancy rate in the UK across 2023 to 2025 ranged from 76% to 77%, whilst Breckland ranged from 76% to 78%.
- 12.20 The additional demand for serviced accommodation in Breckland could increase by 18,200 bed nights by 2041. Based on an average bed occupancy rate of 77% during the year, this additional demand could require 65 additional bed spaces by 2041. A modest increase in the market share of domestic overnight trips could generate further demand.

Inbound international visitors

- 12.21 Visit Britain indicates the number of international visitors to the UK increased steadily between 2009 to 2019 from 31.1 million to 40.9 million visitors, an average annual increase of 2.8%, as shown in Figure 12.4.
- 12.22 During the Covid-19 crisis the number of international visitors slumped to 7.0 million and 6.4 million in 2020 and 2021, respectively. However, inbound visitor numbers improved to 31.2 million in 2022 and up to 41.2 million by 2024, a return to 2019 levels. The visitors in 2023 generated 292.9 visitor nights (the latest available data), an average of 7.7 nights per visitor.
- 12.23 Visit Britain's forecast for 2025 is 43.4 million visitors. Continued growth beyond 2026 could result in increases from the 2019 base, as follows:
- 2019 to 2031 +14.8%
 - 2019 to 2036 +31.8%
 - 2019 to 2041 +51.3%

Figure 12.4 Inbound overnight trips in the UK (millions)



Source: Visit Britain and International Passenger Survey (IPS)

12.24 This level of growth in trips could generate demand for the following number of additional bed nights (based on an average of 7.7 nights per trip):

- By 2031 46.6 million additional bed nights (21.0 million)
- By 2036 100.1 million additional bed nights (45.0 million)
- By 2041 161.6 million additional bed nights (72.7 million)

12.25 If Breckland can attract just 0.1% of these potential additional UK's inbound tourist bed nights (half of its 0.22% market share of domestic nights), then the following additional demand could be accommodated in the District:

- By 2031 46,600 additional bed nights (21,000 serviced accommodation)
- By 2036 100,100 additional bed nights (45,000 serviced accommodation)
- By 2041 161,600 additional bed nights (72,700 serviced accommodation)

12.26 Assuming 45% of these bed nights are provided in serviced accommodating at an average occupancy rate of 77%, this additional projected demand could require 259 additional bed spaces by 2041.

Summary

12.27 The demand for additional hotel and serviced accommodation in Breckland could emerge from a modest increase in the District's low current market share of visitor nights. Notwithstanding the scope to increase market share, national population growth in England could generate demand for an additional 65 bedrooms in the District by 2041. Growth in demand for international visitors based on past growth trends could be higher, generating additional demand for 265 bedrooms in the District by 2041.

- 12.28 The combined domestic and international visitor scope for growth in Breckland could be as follows:
- By 2031 = 105 bed spaces
 - By 2036 = 208 bed spaces
 - By 2041 = 323 bed spaces
- 12.29 Notably, these projections should be considered against existing commitments in the area, such as the planned 125 rooms at the Snetterton Innovation Park Hotel in 2026, which would account for the projected capacity through to 2031.
- 12.30 These projections could be viewed as a minimum requirement, recognising Breckland's potential to increase the market share of existing visitor levels.

13.0 Accommodating growth and change

National guidance

- 13.1 For planning policies, local authorities are required to support the role of town centres and the three main areas policies should focus on:
- defining a network and hierarchy of centres, allowing them to grow and diversify;
 - defining the extent of centre boundaries and primary shopping areas, making clear the uses permitted in these locations; and
 - allocating a range of suitable sites to meet the scale and type of development needed for at least ten years ahead, sites should be allocated consistent with the sequential approach i.e. town centre, then edge-of-centre followed by accessible out-of-centre sites.
- 13.2 The NPPF acknowledges the rapid changes that are affecting town centres and diversification is key to their long-term vitality and viability. Accordingly, planning policies should clarify the range of uses permitted, as part of a positive strategy for the future of each centre.
- 13.3 The NPPF's presumption in favour of sustainable development remains. For plan-making this means that plans should positively seek opportunities to meet the development needs of their area and be sufficiently flexible to adapt to rapid change. It is widely accepted that very long-term projections have inherent uncertainties. In response to these uncertainties, local planning authorities are no longer required to allocate sites to meet the need for town centre uses over the full plan period. The need for new town centre uses over a minimum ten-year period reflects the complexities in bringing forward town centre development sites. In line with the Government's economic growth agenda, a positive approach to meeting community needs is still required.
- 13.4 Applications for retail and town centre uses that are not in an existing centre and are not in accordance with an up-to-date Local Plan will need to be assessed against the sequential and impact tests.
- 13.5 The sequential test in the NPPF indicates main town centre uses should locate in town centres, then in edge-of-centre locations; and only if suitable sites are not available (or expected to become available within a reasonable period) should out-of-centre sites be considered (para. 91). When considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites that are well connected to the town centre. Applicants and local planning authorities should demonstrate flexibility on issues such as format and scale, so that opportunities to utilise suitable town centre or edge-of-centre sites are fully explored (para. 92).
- 13.6 The NPPF states that local planning authorities should require an impact assessment for applications for retail and leisure development outside of town centres, which are not in accordance with an up-to-date development plan and are over a proportionate, locally set floorspace threshold. If there is not a locally set threshold, the default threshold is 2,500 sq.m (para. 94). The locally set thresholds in Breckland District are addressed later in this

section. Where an application fails to satisfy the sequential test or is likely to have a significant adverse impact, it should be refused (para. 95).

- 13.7 The appropriate balance between retail and other town centre activity has been debated in recent years, as town centres increasingly need to compete with on-line shopping. On-line shopping is likely to grow faster than previously expected due to shifts in customer behaviour accelerated by the Covid-19 crisis. The need for a better mix of uses within town centres has become increasingly important. A broader mix of uses should extend activity throughout the daytime and into the evenings.
- 13.8 As set out in Section 2, the Use Classes Order (UCO) was significantly amended in September 2020 and changes to permitted development rights were introduced in August 2021. These changes will have significant implications for shop frontage planning policies, restricting the ability of local planning authorities to control the mix of uses. The implications of these changes are addressed later.
- 13.9 The expenditure projections in this study exclude home shopping made through non-retail businesses, because special forms of trading (sales via the internet, mail order, stalls and markets) is subtracted from the expenditure projections. The assessment adopts Experian's latest information and projections and assumes that special forms of trading will increase in the future, including the growth of internet shopping.

Floorspace capacity projections

- 13.10 The Breckland Local Plan 2023 Policy ECO5 (Town Centre and Retail Strategy) sets out the minimum retail floorspace capacity for comparison and convenience goods retail and food/beverage floorspace during the plan period to 2036. In total 3,440 sq.m of net convenience goods retail floorspace and 10,580 sq.m of net comparison goods floorspace was identified alongside 2,827 sq.m gross food/beverage floorspace. These floorspace projections now need to be updated and rolled forward.
- 13.11 The floorspace projections in Policy ECO5 in the Local Plan were based on the Breckland Retail and Town Centre Study Addendum (2017). The adopted Local Plan sets out the following settlement-specific requirements for the period to 2031:
- Thetford: 1,509 sq.m (net) convenience and 2,986 sq.m (net) comparison retail, and 757 sq.m (gross) food/beverage;
 - Dereham: 839 sq.m (net) convenience and 4,793 sq.m (net) comparison retail, and 849 sq.m (gross) food/beverage;
 - Attleborough: 578 sq.m (net) convenience and 1,016 sq.m (net) comparison retail, and 820 sq.m (gross) food/beverage;
 - Swaffham: 737 sq.m (net) comparison retail and 220 sq.m (gross) food/beverage; and
 - Watton: 514 sq.m (net) convenience and 1,048 sq.m (net) comparison retail, and 181 sq.m (gross) food/beverage.
- 13.12 The updated assessment of the potential for new retail, food/beverage floorspace in this report suggests there is a more modest need for new development in the District. Tables

13.1, 13.2, 13.3 and 13.4 below summarise the new floorspace requirements in the District up to 2031, 2036, 2041 and 2046 (cumulative).

- 13.13 Table 13.1 indicates there is a combined projected floorspace requirement for 3,295 sq.m gross in 2031. By 2040, the combined cumulative requirement increases to 7,179 sq.m gross (Table 13.2), increasing to 10,954 sq.m gross by 2041 (Table 13.3), and then to 16,075 sq.m gross by 2046 (Table 13.4).

Table 13.1 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2031 (sq.m gross)

Destination	Convenience goods retail	Comparison goods retail	Food/ beverage	Leisure/ cultural	Total
Thetford	-	307	573	215	1,095
Dereham	-	271	542	280	1,093
Swaffham	-	28	85	32	145
Watton	-	73	78	100	251
Attleborough	-	63	198	70	331
Other Breckland	-	14	364	-	378
Total	-	757	1,840	698	3,295

Table 13.2 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2036 (sq.m gross)

Destination	Convenience goods retail	Comparison goods retail	Food/ beverage	Leisure/ cultural	Total
Thetford	213	678	1,123	419	2,433
Dereham	224	554	1,035	534	2,347
Swaffham	26	52	158	60	296
Watton	90	158	151	195	594
Attleborough	115	125	378	135	753
Other Breckland	30	28	698	-	756
Total	698	1,596	3,543	1,342	7,179

Table 13.3 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2041 (sq.m gross)

Destination	Convenience goods retail	Comparison goods retail	Food/ beverage	Leisure/ cultural	Total
Thetford	374	1,100	1,691	629	3,794
Dereham	365	860	1,531	790	3,546
Swaffham	45	79	230	87	441
Watton	147	245	223	289	904
Attleborough	184	194	565	200	1,143
Other Breckland	48	44	1,034	-	1,126
Total	1,162	2,522	5,274	1,996	10,954

Table 13.4 Combined retail, food/beverage, leisure, entertainment floorspace requirements up to 2046 (sq.m gross)

Destination	Convenience goods retail	Comparison goods retail	Food/ beverage	Leisure/ cultural	Total
Thetford	614	1,955	2,289	852	5,710
Dereham	579	1,512	2,043	1,054	5,188
Swaffham	75	149	300	113	637
Watton	236	433	299	388	1,356
Attleborough	285	329	763	270	1,647
Other Breckland	76	78	1,383	-	1,537
Total	1,865	4,456	7,077	2,677	16,075

Source: Tables 11 and 12 in Appendix 2, 3, 4 and 5.

- 13.14 These projections assume facilities in Breckland will maintain their market share of expenditure in the future. This approach recognises that additional development within the District may help to increase the area's market share, but this increase will be counter-balanced by development within competing centres. The household survey results indicate the District retains a reasonable level of expenditure and a significant increase in market shares is unrealistic. Conversely a significant reduction in market share could undermine the vitality and viability of centres in the District. A balanced and sustainable approach should be adopted.
- 13.15 Growth in the food/beverage and commercial leisure, entertainment and culture sectors provide an opportunity to enhance the evening and night-time economy in centres, including the repurposing of vacant retail floorspace. The new Local Plan should recognise and foster this potential, albeit recognising potential negative environmental and amenity effects and considering appropriate management strategies and mitigation measures.
- 13.16 The NPPF indicates that local plans should allocate a range of suitable sites to meet the scale and type of retail, leisure and other development needed in town centres. To accommodate growth, local planning authorities should keep town centre boundaries under review. The floorspace projections should be viewed as broad guidance and a starting point for the review of development opportunities and development management policies.

Vacant shop premises

- 13.17 The need assessment in this report assumes that existing retail and service floorspace can, on average, increase its turnover to sales floorspace densities. In addition to the growth in sales densities, vacant shop premises could help to accommodate future growth. The existing stock of premises should have a key role to play in accommodating any projected growth, particularly in the short to medium term.
- 13.18 There are currently 92 vacant shop units in the five town centres in Breckland, an average vacancy rate of 14.1%, which is above the pre-Covid UK average (12.4%) and below the current UK average (14.8%).
- 13.19 The floorspace capacity projections suggest the priority in the short-term will be the reoccupation of vacant shop units. The floorspace projections up to 2036 suggest there is a

need to retain the existing stock of shop premises within centres to accommodate future growth in the later stages of the plan period.

- 13.20 As a strategic objective, if the shop vacancy rate in Thetford and Dereham reduced to 10%, allowing for the natural churn of occupiers in successful town centres, then 26 shop units could be reoccupied. These reductions in the shop vacancy rate could theoretically accommodate about 2,600 sq.m gross based on an average of 100 sq.m gross per unit, which is less than the projected combined retail, food/beverage, and leisure/cultural floorspace under-supply up to 2031 (3,295 sq.m gross). Based on the 10% vacancy rate target, reoccupied vacant floorspace could be distributed as follows:
- Thetford 1,600 sq.m gross
 - Dereham 1,000 sq.m gross
- 13.21 There may also be potential in other town centres where the vacancy rate is currently below 10%. The re-occupation of vacant floorspace and the need to bring forward new development, over and above this, will need to be considered in the context of the Council's emerging spatial strategy.
- 13.22 The floorspace projections to 2046 suggest there is a quantitative need to increase the combined amount of retail, food/beverage and leisure/entertainment floorspace in Breckland, over and above the potential re-occupation of vacant floorspace.
- 13.23 The changes to the Use Classes Order and permitted development rights, as described in Section 2, will provide more flexibility for landowners to change the use of retail premises to other town centre uses and residential and restrict Breckland's ability to control the mix of uses in the future.
- 13.24 The capacity projections in this study suggest there is a need to allocate sites for retail and leisure development to accommodate projected growth up to 2046. However, the priority in the short term up to 2031 will be the reoccupation of vacant shop units, potentially for non-retail uses including food/beverage outlets, leisure, entertainment and cultural uses.
- 13.25 The floorspace projections suggest there is a need to retain the existing stock of shop premises within designated centres to accommodate future growth. The need for Article 4 Directions to remove permitted development rights could be considered in areas with limited vacancy rates and where there is pressure for alternative uses that could undermine the vitality and viability of the town centre.
- 13.26 The future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town centres to accommodate future investment opportunities.

14.0 Policy implications

14.1 This Section sets out the implications for emerging policies within the new Local Plan.

Hierarchy of centres

14.2 In relation to town centres, the NPPF Annex 2 Glossary indicates:

“References to town centres or centres apply to city centres, town centres, district centres and local centres but exclude small parades of shops of purely neighbourhood significance.”

14.3 The network of town centres is currently set out in the Breckland Local Plan, adopted September 2023. Policy GEN 03 (Settlement Hierarchy) sets out the spatial strategy for development, whilst Policy EC 05 (Town Centre and Retail Strategy) sets out the retail hierarchy for Breckland.

14.4 Policy GEN 03 directs growth to appropriate locations in accordance with the identification of Attleborough and Thetford as a Key Settlements, above Dereham, Swaffham and Watton as Market Towns, and includes a wider range of settlements in its Local Service Centres and Villages with Boundaries categories.

14.5 The following retail hierarchy is designated in Policy EC 05:

- 1 Key Centre: Thetford;
- 2 Main Centre: Dereham; and
- 3 Medium Town Centres: Attleborough, Swaffham and Watton;

14.6 Policy EC 05 designates Town Centres, Primary Shopping Areas, and Primary/Secondary Shopping Frontages within the Policies Map.

14.7 Continuing to identify the hierarchy of centres in the new Local Plan will be important in terms of:

- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
- directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
- identifying a viable role and strategy for each centre.

14.8 The analysis of centres in Section 4 and Appendix 2 indicates the current designation of centres and hierarchy are sound. However, the Council could consider upgrading the status of Dereham to key centre level, reflecting the size of the centre (number of outlets), proportion of visitors to the centre, and turnover identified.

14.9 There may also opportunities to amend centre boundaries to more appropriately reflect the extent of town centre uses, as outlined later in this Section.

Impact and sequential tests

14.10 Policy EC 05 (Town Centre and Retail Strategy) of the Breckland Local Plan (2023) relates to the development of town centre uses within and outside town centres. The policy then

designates Primary Shopping Areas (PSA) as the ‘area where retail development is concentrated’, as well as Primary Frontages (PF) ‘areas of mainly shops’ and Secondary Frontages (SF) which ‘provides greater opportunities for a diversity of uses’, to control an appropriate balance of uses. These boundaries and frontages are defined within the Planning Policy Map.

- 14.11 The supporting test to Policy EC 05 refers to the sequential test on a number of occasions, and there are two references within the policy wording itself:

‘Site selection for retail and other town centre functions should follow the sequential test and prevailing national policies and guidance’; and

‘The development of additional retail floorspace outside of defined centres will be restricted where it fails the sequential and impact tests (except where it serves local need).’

- 14.12 The NPPF (paragraph 91) maintains that all main town centre uses are required to comply with the sequential test, not just retail uses. Paragraph 92 also states that “*when considering edge-of-centre and out-of-centre proposals, preference should be given to accessible sites which are well-connected to the town centre.*” An out-of-centre site could be rejected under the sequential test where it is not accessible or not well-connected to the town centre, and where another accessible and well-connected site is available and suitable. To avoid potential confusion, updated policies within the emerging Local Plan should reflect the NPPF wording.

- 14.13 Policy EC 05 indicates that, outside of the defined town centres, ‘*an impact assessment for retail, leisure and/or office schemes will be required on schemes of 1,000 sq m gross and over in Thetford and Dereham and 500 sq m gross and over in Attleborough, Swaffham and Watton.*’

- 14.14 The NPPF (paragraph 94) indicates that when assessing applications for retail and leisure development outside of town centres and not in accordance with an up-to-date local plan, local planning authorities should require an impact assessment if the development is over a proportionate, locally set floorspace threshold. The NPPF indicates the impact test only applies to retail and leisure uses and does not include office uses, which should be removed from emerging Local Plan policies for consistency with the NPPF.

- 14.15 It is also not clearly set out in Policy EC 05 that the boundary for requiring an impact assessment for retail uses would be the Primary Shopping Area, whereas the boundary for leisure developments would be the Town Centre, as stated within the NPPF Glossary in relation to the definition of ‘edge of centre’.

Impact threshold

- 14.16 The PPG provides guidance on setting locally appropriate thresholds, and indicates it will be important to consider:
- the scale of proposals relative to town centres;
 - the existing viability and vitality of town centres;
 - cumulative effects of recent developments;
 - whether local town centres are vulnerable; and

- the likely effects of development on any town centre strategy, and the impact on any other planned investment.

- 14.17 The PPG also states that where authorities do not have their own floorspace thresholds for impact assessments in local development plans, national policy requires impact assessments to be submitted for retail and leisure developments over 2,500 sqm gross. The PPG acknowledges the need to consider the impact of proposals below this floorspace threshold, e.g. if they are large developments when compared with the size of a nearby centre, or likely to have a disproportionate effect or ‘tip the balance’ of a vulnerable centre.
- 14.18 As set out in Paragraph 14.13 above, Policy EC 05 defines a locally set threshold of 1,000 sq.m gross and over in Thetford and Dereham and 500 sq.m gross and over in Attleborough, Swaffham and Watton.
- 14.19 The higher NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Breckland District because this scale of development would exceed the five-year retail and food beverage projections for all centres in the District. The lower retail capacity projections, relatively high vacancy rate in Thetford and Dereham, and uncertainties about the post-cost of living crisis recovery suggest that the Districts’ town centres continue to be vulnerable to out-of-centre developments, and the existing minimum thresholds in the adopted Local Plan continue to provide an appropriate and proportionate approach.
- 14.20 All retail and leisure developments over the thresholds proposed outside or on the edge of designated centres should be required to prepare a proportionate impact assessment, including retail and leisure uses included within mixed-use allocations. The level of detail required in the impact assessment will vary case-by-case and it is for the applicant to provide robust justification that their impact assessment is robust, appropriate and proportionate.
- 14.21 The NPPG indicates impact assessments need to be undertaken in a proportionate and locally appropriate way, drawing on existing information where possible.

Implications of UCO changes for the impact and sequential tests

- 14.22 Retail and leisure uses previously related to Use Classes A1 to A5 and D2 leisure uses. Changes to the UCO may lead to confusion. For example, not all uses within the new Class E are retail or leisure uses requiring an impact assessment i.e. offices and medical uses. Bearing in mind the potential for confusion arising from the UCO changes and for consistency with the NPPF, new Local Plan policies relating to the impact test should, as indicated above, refer to retail and leisure uses, rather than Class E within the new UCO. The sequential test should continue to refer to all main town centre uses as described in the NPPF glossary.

Sequential test floorspace threshold

- 14.23 The NPPF does not refer to a minimum floorspace threshold where the sequential test will be applied to main town centre uses in the same way as the impact test. All main town centre uses regardless of scale are required to comply with the sequential test. However, the PPG suggests some certain main town centre uses have “*particular market and locational requirements that mean they may only be accommodated in specific locations*”, but robust

justification must be provided to satisfy the sequential test in this respect. This approach may allow smaller scale local facilities outside designated town, district and local centres to be provided in areas that may be poorly served and/or within mixed use development, to provide facilities catering for the local needs of the development, without needing to consider the sequential test.

Town centre and primary shopping area boundaries

- 14.24 The new Local Plan should continue to define clear boundaries for town centres on the Proposals Map. Designated centres should remain the expected focus for retail, leisure and other main town centre uses. The classification of centres within the hierarchy is important in identifying which centres are relevant in the search for sequential sites.
- 14.25 The continued identification of town centre boundaries in Breckland, as well as PSAs within centres, is important when applying the sequential approach, to direct retail and other town centre uses to sustainable locations and determine whether a retail impact assessment is required. The NPPF continues to indicate that the first preference for retail uses should be the PSA. In some circumstances where a centre is relatively small, the town centre boundary and PSA may cover the same area, in which case, only one boundary is required on the Proposals Map.
- 14.26 The first preference for leisure and other non-retail main town centre uses is normally the wider defined town centre area, which usually includes the PSA and other parts of the town centre. The ability to focus new retail uses within the PSA, rather than the wider town centre area or indeed out-of-centre locations, has become more difficult with the introduction of the new Class E, which allows free movement to and from retail use and other town centre uses. Some leisure uses, for example, fall within Class E, whereas some others fall within 'Sui Generis'. Local Plan policies could provide further clarity on main town centre uses, that is all retail and leisure uses, as defined by the NPPF, in its efforts to seek to protect Class E within Breckland's designated centres.
- 14.27 The continued need for both a town centre boundary and a PSA as well as both Primary and Secondary Frontages in the centres should be considered, particularly where the existing PSA covers the area affected by the frontages.
- 14.28 The area of search for sequential sites i.e. relevant centres, will depend on the scale, nature and location of the proposed town centre uses and the catchment area they are likely to serve, should be considered on a case-by-case basis. As indicated above, some proposed main town centre uses may have market and locational requirements that cannot be met within designated centres. Where this requirement is suggested, robust justification must be provided by the applicant.
- 14.29 The retail, food/beverage and leisure floorspace capacity projections suggest the contraction of town centre boundaries is unnecessary. The expansion or contraction of centre boundaries and scope for development should be considered on a centre-by-centre basis, as outlined below.
- 14.30 The contraction of centre boundaries would only be appropriate where there is a concentration of non-town centre uses on the periphery of centres e.g. residential areas or non-commercial gaps in frontages and/or a concentration of vacant shop units.

Controlling the mix of uses

- 14.31 The ability to control the mix of uses within centres and designated frontages has changed significantly since the 2017 Addendum to the Breckland Retail Study that informed the Council's 2023 Local Plan. Current and future market trends; the low retail floorspace capacity projections; and changes to the NPPF and the UCO, indicate a more flexible approach to shop frontage policies and the mix of uses within centres should be considered.
- 14.32 A balanced approach that recognises the need to maintain and enhance each centre's retail role, as well as introducing new non-retail uses including activities in the early evening and night-time economy. However, there is still a need to retain and encourage new retail uses previously categorised as Class A1 uses within the town local centres, but changes to the Use Classes Order (UCO) and Permitted Development Rights (PDR) will restrict the future policy approach.
- 14.33 Considering the changes to the UCO and PDR, restrictive frontage-based policies could be unsound and unimplementable for existing premises. Article 4 directions can be considered e.g. to remove permitted changes of use from Class E to residential (Class MA) within centres to protect their vitality and viability. However, Article 4 directions cannot prevent movement within the same use class i.e. new Class E. The loss of retail uses to other sub-categories of Class E cannot be controlled.
- 14.34 In some circumstances, the introduction of restrictive shop frontage policies or Article 4 directions could be inappropriate e.g. in areas with a high level of vacancies and where an increase in vacant units could harm the vitality and viability of the centre, for example, in Thetford.
- 14.35 Non-Class E uses including pubs, bars, hot food takeaways and other Sui Generis uses can be assessed against criteria-based policies e.g. relating to breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the retail frontages. Betting shops and hot food takeaways are Sui Generis uses that can still be controlled by policy, and this is not affected by changes to the Use Classes Order or Permitted Development Rights. Other non-Class E uses at ground floor level can be controlled within / outside of the designated PSA.
- 14.36 Notwithstanding the reduced controls, the mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e. where there is a change of use requiring planning permission, redevelopment or new development is proposed, in the same way planning conditions / legal agreements were previously used to control movement usually permitted within the former Class A uses. This approach could be used to control the mix of ground floor uses on development site allocations.
- 14.37 The new Local Plan could continue to designate PSAs in designated Town Centres to protect the retail function of the area. The continued designation of primary and secondary frontages, in addition to a PSA, is no longer consistent with the NPPF and is probably unnecessary due to the changes to the UCO.
- 14.38 Strengthening or retaining the current EC 05 policy approach, which gives preference to retail uses within Primary Frontages and town centre uses within Secondary Frontages, will be difficult to implement following the changes to the UCO. The floorspace projections suggest some shift from retail to non-retail use may be appropriate in specific locations where they would continue to support the wider vitality and viability of the centres.

Recommended policy approach

- 14.39 A designated PSA is recommended in designated town centres. Within these areas the objective should be to maintain and enhance the retail offer and other uses within Class E. Development should maintain an active frontage. Within other parts of the town centres, a wider range of main town centre uses, including Class E, Sui Generis and Class F, could be promoted and protected.
- 14.40 Proposals that require planning permission that would result in the loss of these uses at ground floor level in the PSA or wider centre boundary could be permitted subject to criteria relating to:
- individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre as a whole;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.
- 14.41 Encouraging Class E uses within the PSA will include non-retail main town centre uses not previously permitted at ground floor level e.g. offices and leisure uses. Non-Class E uses, including pubs, bars, hot food takeaways and other Sui Generis uses, can be controlled in the PSA, but could be encouraged to locate in other parts of the town centres where appropriate i.e. preventing breaks in active frontages, amenity issues (noise/smells), impact on the nature and character of the street frontages.
- 14.42 The continued Policy EC 05 support for the amalgamation of units to provide larger floorplate units to reflect market demand should be encouraged, whilst minimal reductions in floorspace to enable the sub-division of existing units would be supported to support new formats or the re-occupation of long-term vacancies where it can be demonstrated that such development would not harm the wider vitality and viability of the centres.
- 14.43 In the future and in specific cases, it may be appropriate to consider Article 4 directions to prevent permitted changes of use that could undermine the character or vitality and viability of parts of the centres. This approach could be appropriate where there is demonstrable evidence that concentrations of non-commercial uses are emerging through PD rights, creating dead frontages and gaps in activity. However, this approach could be inappropriate in areas of low demand for retail and main town centre uses, because it could lead to higher levels of vacancy. Furthermore, Article 4 directions cannot restrict the movement of activities within the new Class E and the potential to use this approach is limited in relation to retaining retail uses within the centre. At present there have been few PD rights changes of use in Breckland District's centres and there are no obvious concentrations of non-commercial uses or dead frontages. The introduction of Article 4 directions is not currently considered necessary, although this should be kept under review.
- 14.44 The mix of uses within Use Class E can still be controlled via planning conditions or legal agreements, where planning permission is required i.e. changes of use requiring planning permission, redevelopment or new development is proposed. This approach could be used to control the mix of ground floor uses on development site allocations in centres.

15.0 Conclusions and recommendations

- 15.1 This section draws together the analysis set out in previous sections and provides strategic recommendations for Breckland District. It explores how the identified growth and change across the District could be accommodated and the future role of the centres.

Meeting Breckland District's needs

- 15.2 When planning for growth in main town centre uses, local planning authorities should allocate a range of suitable sites to meet the scale and type of retail development needed. It is important that the needs for retail and other main town centre uses are met in full and not compromised by limited site availability. The combined floorspace projections (positive and negative) for retail and food/beverage floorspace in 2030, 2035 and 2040 are summarised in Tables 8.1 and 8.2.

Table 15.1 Combined retail, food/beverage, leisure and cultural floorspace requirements (sq.m gross) - cumulative

	Convenience retail (sq.m gross)	Comparison retail (sq.m gross)	Food /beverage (sq.m gross)	Leisure /cultural (sq.m gross)	Total (sq.m gross)
By 2031	-	757	1,840	698	3,295
By 2036	698	1,596	3,543	1,342	7,179
By 2041	1,162	2,522	5,274	1,996	10,954
By 2046	1,865	4,456	7,077	2,677	16,075

Table 15.2 Combined floorspace requirements by location (sq.m gross) - cumulative

	By 2031	By 2036	By 2041	By 2046
Thetford	1,095	2,433	3,794	5,710
Dereham	1,093	2,347	3,546	5,188
Swaffham	145	296	441	637
Watton	251	594	904	1,356
Attleborough	331	753	1,143	1,647
Other Breckland	378	756	1,126	1,537
Total	3,295	7,179	10,954	16,075

- 15.3 The leisure expenditure projections indicate there may be potential to accommodate an additional 700 sq.m gross of commercial leisure and cultural floorspace by 2031, increasing to 1,350 sq.m gross by 2036, 2,000 sq.m gross by 2041, and then almost 2,700 sq.m gross by 2046. This additional floorspace could include:
- up to two large or four medium sized health and fitness facilities;
 - a bingo facility in the north of the District;
 - new leisure innovations e.g. soft play, indoor climbing, escape rooms, virtual sport activities; and
 - small scale tourist attractions/cultural facilities.

- 15.4 Hotel demand across Breckland is modest, reflecting the sectors relatively strong recovery from Covid-19 within the District. Assuming a consistent market share, projected growth in domestic and international visitors suggest demand for an additional 105 bed spaces by 2031, growing to 208 bed spaces by 2036 and 323 bed spaces by 2041, of which 125 bed spaces are already accounted for through committed development.
- 15.5 Long-term floorspace capacity forecasts beyond ten years (2036) are susceptible to unforeseen circumstances. Growth forecasts for expenditure and turnover are particularly uncertain and need to be carefully monitored, including the continued growth in home/internet shopping and planned housing growth. Long-term projections must be treated with caution and kept under review, particularly projections after 2037.
- 15.6 Future planning policy within the emerging Local Plan should seek to ensure new mixed-use developments are flexible. Policy criteria relating to good design and the configuration of buildings should seek to ensure building floorplate can be readily merge and/or sub-divided, offering maximum flexibility to respond to changing operator requirements over the plan period.
- 15.7 The capacity projections in this update suggest there is a requirement to allocate sites for retail or leisure development to accommodate projected growth for the first 10 years of the plan period. All the residual need for development is unlikely to be accommodated within the existing town centre boundaries. However, the projected capacity for new floorspace relates to population growth rather than growth in expenditure from the existing population. Major housing developments may be required to meet the growing population. A significant element of the residual retail, food/beverage and leisure floorspace capacity is likely to be accommodated within these large residential developments in the form of new centres, or neighbourhood parades.
- 15.8 The priority in the short to medium term will be the reoccupation of vacant shop units. However, the future strategy should be flexible to respond to new investment that cannot be accommodated in vacant units. Some redevelopment, refurbishment and expansion may be required in addition to the reoccupation of vacant units, ideally within town and district centres to accommodate future investment and strategic growth opportunities.

Future planning policy

Hierarchy of centres

- 15.9 Identifying the hierarchy of centres and the boundaries of centres in the new Local Plan is important in terms of:
- ensuring the vitality and viability of town and local centres is maintained and enhanced as important hubs for the community, through the application of the impact test;
 - directing retail and main town centre uses to appropriate accessible and sustainable locations, through the application of the sequential approach to site selection; and
 - identifying a viable role and strategy for each centre.
- 15.10 The existing designations of town centres are appropriate and sound, but the Council could consider upgrading Dereham to Key Centre status.

Impact and sequential tests

- 15.11 The new Local Plan should continue to refer to the sequential and impact tests and which designated centres need to be considered. New Local Plan policies relating to the impact test should refer to retail and leisure uses rather than Retail, leisure, and office uses. The sequential test should refer to all main town centre uses as described in the NPPF glossary. New Local Plan policies should reflect the NPPF wording.
- 15.12 The NPPF minimum threshold of 2,500 sq.m gross continues to be an inappropriate threshold for Breckland District because this scale of development would exceed the capacity projections for all centres in the District. The lower impact thresholds of 1,000 sq.m (Thetford and Dereham) and 500 sq.m (Attleborough, Swaffham and Watton) remain appropriate.

Town and local centre boundaries

- 15.13 The new Local Plan should continue to define clear boundaries for town centres on the Proposals Map and should remain the focus for retail, leisure and other main town centre uses. The continued need for both town centre boundaries and Primary Shopping Area (PSA) in the designated Town Centres remains sound. However, the Council may wish to consider the appropriateness of continuing to designate Primary and Secondary Frontages.
- 15.14 The retail floorspace capacity projections suggest there is no need to significantly contract centre boundaries beyond updates around long-term non-town centre uses or vacant shop units. Some minor amendments to centre boundaries could be considered once the Council has identified a wider spatial strategy in order to accommodate the housing growth, and the need for any additional local centres to support this emerging population.

Controlling the mix of uses

- 15.15 The designated PSAs should be retained. In these areas, retail and other Class E uses should be maintain and enhanced. Development should maintain an active frontage. Within other parts of the town centres a wider range of main town centre uses including Class E, Sui Generis and Class F could be promoted and protected.
- 15.16 Proposals that require planning permission that would result in the loss of these uses at ground floor level in all designated centres could only be permitted subject to criteria relating to:
- individual or cumulative impact on neighbouring amenity;
 - adverse impact on the vitality and viability of the centre as a whole;
 - provision of an active frontage at ground floor level which relates well to the design of the building and to the street-scene and its setting; and
 - adequate marketing of the unit for Class E uses in primary frontages or Class E, Sui Generis and Class F uses in other parts of the centre.

Future monitoring

- 15.17 The recommendations and projections within this study will assist the Council in reviewing development plan policies over the coming years and to assist future development

management decisions. The study provides an overview of the potential need for further retail and leisure development in the medium and long-term up to 2046. Longer-term projections are subject to uncertainty and forecasts will need to be amended to reflect emerging changes, as and when new information becomes available. These uncertainties include population projections, as well as the longer-term implications of the Covid-19 and cost-of-living crisis that will need to be monitored. Longer-term projections after 2036 should be treated with caution and provide broad guidance only. Projections should be monitored and the floorspace projections rolled forward. The following key assumptions should be updated as necessary:

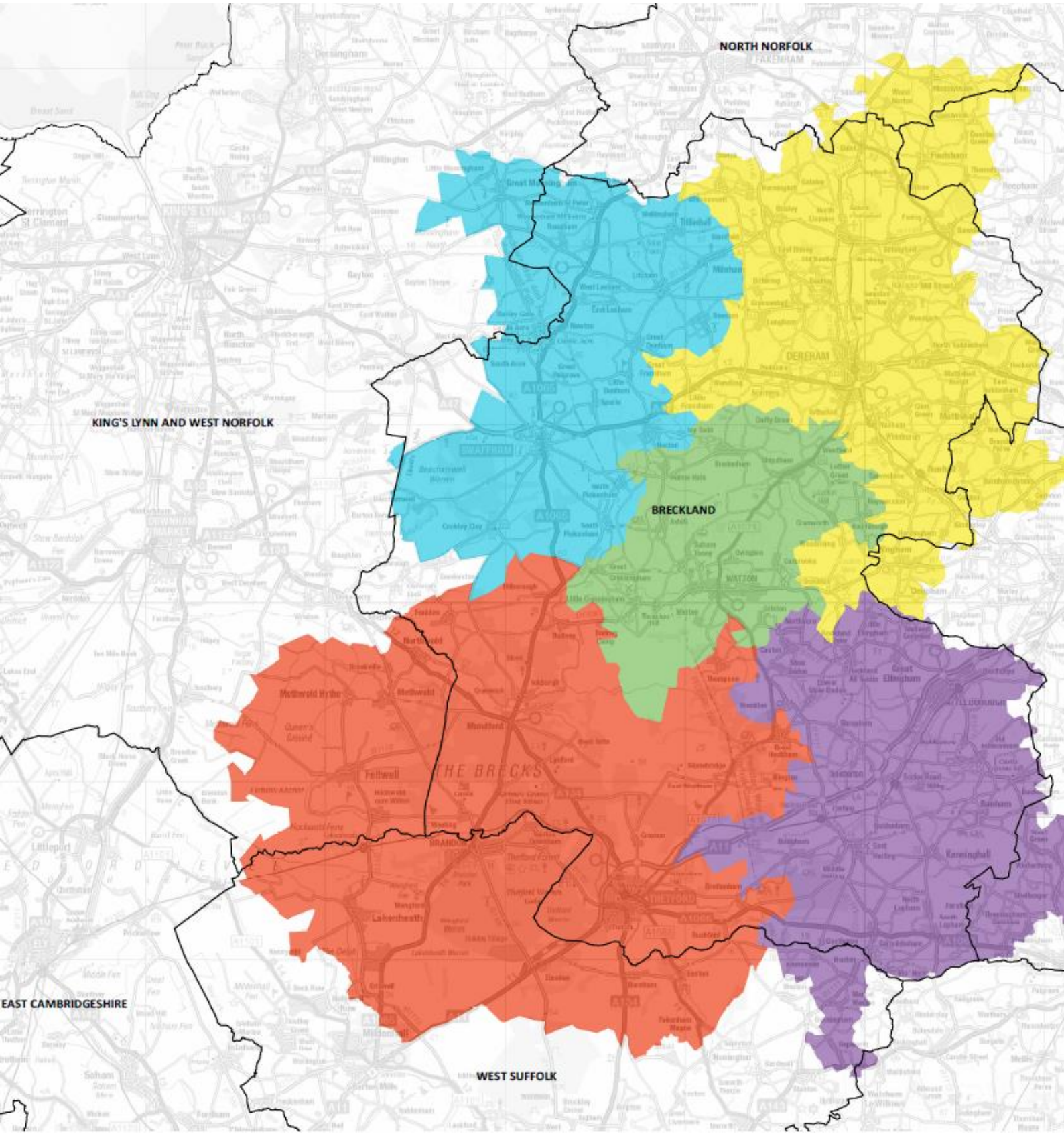
- population projections;
- local expenditure estimates (information from Experian or other recognised providers);
- growth rate assumptions for expenditure per capita (information from Experian or other recognised data providers);
- the impact of potential increases in home and internet shopping (Experian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

15.18 These key inputs into the retail/leisure capacity assessment can be amended to provide revised capacity projections. The mix of uses within the town centres should be quantified, if not annually, every two to three years to monitor key changes and trends that could affect the vitality and viability of the centres.

Appendix 1 Study area

Table 1 Study Area Zones

Zone	Postcode sectors	Household survey sample
1. Thetford	IP24 1 IP24 2 IP24 3 IP26 4 IP26 5 IP27 0 IP27 9	258
2. Dereham	NR19 1 NR19 2 NR20 3 NR20 4 NR20 5 NR9 4	206
3. Swaffham	PE32 2 PE37 7 PE37 8	100
4. Watton	IP25 6 IP25 7	100
5. Attleborough	NR17 1 NR17 2 NR16 2 IP22 2	145



Appendix 2 Convenience goods capacity

Table 1 - Study area population projections

Zone	2025	2031	2036	2041	2046
1 - Thetford	60,751	62,976	64,723	66,427	68,095
2 - Dereham	48,282	50,184	51,527	52,777	53,957
3 - Swaffham	19,532	20,164	20,501	20,797	20,977
4 - Watton	22,284	23,112	23,735	24,277	24,800
5 - Attleborough	31,812	33,255	34,282	35,280	36,293
Total	182,661	189,691	194,768	199,558	204,121

Sources: Experian population projections March 2025.

Table 2 - Convenience goods expenditure per person per annum (£)

Zone	2025	2031	2036	2041	2046
1 - Thetford	2,635	2,555	2,511	2,473	2,455
2 - Dereham	2,867	2,780	2,732	2,690	2,671
3 - Swaffham	2,965	2,876	2,826	2,783	2,764
4 - Watton	2,821	2,736	2,689	2,648	2,629
5 - Attleborough	2,883	2,796	2,748	2,706	2,687

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Excludes Special Forms of Trading (SFT)

Table 3 - Total convenience goods expenditure (£M)

Zone	2025	2031	2036	2041	2046
1 - Thetford	160.06	160.93	162.52	164.25	167.20
2 - Dereham	138.40	139.52	140.77	141.98	144.14
3 - Swaffham	57.92	57.99	57.94	57.88	57.97
4 - Watton	62.87	63.24	63.82	64.28	65.20
5 - Attleborough	91.72	92.99	94.20	95.46	97.52
Total	510.97	514.67	519.25	523.86	532.04

Source: Tables 1 and 2

Table 4 - Base year 2025 convenience goods market shares by zone (%)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow
Aldi, Thetford	13.0%	0.0%	0.0%	1.1%	1.3%	10.0%
Lidl, Thetford	6.8%	0.0%	0.0%	0.0%	3.7%	10.0%
Sainsbury's, Thetford	8.4%	0.0%	0.0%	0.6%	0.2%	10.0%
Tesco, Kilverstone, Thetford	21.2%	0.0%	0.0%	0.0%	5.7%	10.0%
Other Thetford	14.8%	0.0%	0.0%	0.8%	0.3%	10.0%
Thetford sub-total	64.1%	0.0%	0.0%	2.5%	11.2%	
Aldi, Dereham	0.0%	15.4%	7.1%	0.9%	0.0%	5.0%
Lidl, Dereham	0.0%	6.3%	4.5%	1.8%	0.0%	5.0%
Morrisons, Dereham	0.0%	21.6%	1.6%	1.9%	0.2%	5.0%
Tesco, Dereham	0.1%	21.2%	5.7%	12.8%	0.8%	5.0%
Other Dereham	0.0%	12.8%	0.6%	1.8%	0.4%	5.0%
Dereham sub-total	0.1%	77.3%	19.6%	19.3%	1.4%	
Asda, Swaffham	0.0%	0.1%	10.2%	1.7%	0.0%	10.0%
Tesco, Swaffham	0.2%	0.1%	32.1%	1.0%	0.0%	10.0%
Waitrose, Swaffham	0.2%	1.0%	8.0%	1.5%	0.0%	10.0%
Other Swaffham	0.4%	0.1%	6.7%	0.2%	0.0%	10.0%
Swaffham sub-total	0.9%	1.4%	57.0%	4.4%	0.0%	
Lidl, Watton	1.3%	0.3%	0.0%	12.0%	1.3%	2.0%
Tesco, Watton	2.7%	0.3%	0.0%	39.3%	4.7%	2.0%
Other Watton	0.0%	0.0%	0.0%	11.7%	0.0%	2.0%
Watton sub-total	4.1%	0.6%	0.0%	62.9%	6.0%	
Sainsbury's, Attleborough	0.2%	0.3%	0.0%	0.9%	23.0%	5.0%
Lidl, Attleborough	0.9%	0.1%	0.0%	0.0%	19.4%	5.0%
Other Attleborough	0.0%	0.0%	0.0%	0.0%	3.0%	5.0%
Attleborough sub-total	1.0%	0.5%	0.0%	0.9%	45.5%	
Other Breckland District	0.2%	3.3%	6.6%	3.8%	6.7%	2.0%
Breckland District Total	70.5%	83.1%	83.2%	93.8%	70.8%	n/a
Brandon/Lakenheath	21.2%	0.0%	1.0%	0.0%	0.0%	n/a
Bury St Edmunds	2.5%	0.0%	0.0%	0.0%	0.6%	n/a
Diss	0.3%	0.1%	0.0%	0.2%	16.3%	n/a
Downham Market	0.7%	0.0%	0.2%	0.0%	0.0%	n/a
Fakenahm	0.6%	3.4%	7.6%	0.0%	0.0%	n/a
Kings Lynn	1.3%	0.6%	6.1%	1.0%	0.0%	n/a
Norwich	0.4%	8.6%	0.0%	4.1%	2.8%	n/a
Wymondham	0.5%	1.9%	0.0%	0.8%	8.6%	n/a
Elsewhere	1.9%	2.4%	1.9%	0.0%	0.9%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2025 and Lichfields' analysis.

Table 5 - Base year 2025 convenience goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2025	£160.06	£138.40	£57.92	£62.87	£91.72		£510.97
Aldi, Thetford	£20.76	£0.00	£0.00	£0.70	£1.19	£2.52	£25.17
Lidl, Thetford	£10.82	£0.00	£0.00	£0.00	£3.39	£1.58	£15.79
Sainsbury's, Thetford	£13.51	£0.00	£0.00	£0.35	£0.16	£1.56	£15.58
Tesco, Kilverstone, Thetford	£33.89	£0.00	£0.00	£0.00	£5.22	£4.35	£43.45
Other Thetford	£23.68	£0.00	£0.00	£0.53	£0.31	£2.72	£27.24
Thetford sub-total	£102.66	£0.00	£0.00	£1.57	£10.27	£12.72	£127.23
Aldi, Dereham	£0.00	£21.36	£4.11	£0.55	£0.00	£1.37	£27.40
Lidl, Dereham	£0.00	£8.78	£2.63	£1.16	£0.00	£0.66	£13.23
Morrisons, Dereham	£0.08	£29.86	£0.95	£1.19	£0.16	£1.70	£33.93
Tesco, Dereham	£0.16	£29.32	£3.28	£8.07	£0.74	£2.19	£43.76
Other Dereham	£0.00	£17.70	£0.37	£1.15	£0.37	£1.03	£20.62
Dereham sub-total	£0.24	£107.02	£11.34	£12.13	£1.27	£6.95	£138.94
Asda, Swaffham	£0.00	£0.18	£5.89	£1.08	£0.00	£0.79	£7.94
Tesco, Swaffham	£0.32	£0.18	£18.62	£0.64	£0.00	£2.19	£21.94
Waitrose, Swaffham	£0.39	£1.38	£4.64	£0.92	£0.00	£0.81	£8.15
Other Swaffham	£0.72	£0.18	£3.89	£0.10	£0.00	£0.54	£5.43
Swaffham sub-total	£1.42	£1.90	£33.04	£2.75	£0.00	£4.35	£43.46
Lidl, Watton	£2.12	£0.40	£0.00	£7.55	£1.19	£0.23	£11.49
Tesco, Watton	£4.40	£0.47	£0.00	£24.68	£4.35	£0.69	£34.60
Other Watton	£0.00	£0.00	£0.00	£7.34	£0.00	£0.15	£7.49
Watton sub-total	£6.52	£0.88	£0.00	£39.57	£5.54	£1.07	£53.58
Sainsbury's, Attleborough	£0.27	£0.45	£0.00	£0.59	£21.08	£1.18	£23.57
Lidl, Attleborough	£1.38	£0.20	£0.00	£0.00	£17.84	£1.02	£20.43
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£2.77	£0.15	£2.92
Attleborough sub-total	£1.65	£0.65	£0.00	£0.59	£41.70	£2.35	£46.92
Other Breckland District	£0.30	£4.53	£3.81	£2.37	£6.15	£0.35	£17.50
Breckland District Total	£112.78	£114.97	£48.18	£58.99	£64.92	£27.78	£427.63
Brandon/Lakenheath	£33.97	£0.00	£0.58	£0.00	£0.00	n/a	£34.55
Bury St Edmunds	£3.94	£0.00	£0.00	£0.00	£0.55	n/a	£4.49
Diss	£0.47	£0.10	£0.00	£0.15	£14.99	n/a	£15.70
Downham Market	£1.11	£0.00	£0.12	£0.00	£0.00	n/a	£1.23
Fakenahm	£1.04	£4.76	£4.40	£0.00	£0.00	n/a	£10.20
Kings Lynn	£2.09	£0.78	£3.52	£0.65	£0.00	n/a	£7.03
Norwich	£0.70	£11.91	£0.00	£2.57	£2.52	n/a	£17.69
Wymondham	£0.86	£2.62	£0.00	£0.52	£7.91	n/a	£11.91
Elsewhere	£3.11	£3.27	£1.12	£0.00	£0.82	n/a	£8.31
TOTAL	£160.06	£138.40	£57.92	£62.87	£91.72	n/a	£538.75

Source: Table 3 and Table 4

Table 6 - Future 2031 convenience goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2031	£160.93	£139.52	£57.99	£63.24	£92.99		£514.67
Aldi, Thetford	£20.88	£0.00	£0.00	£0.70	£1.21	£2.53	£25.32
Lidl, Thetford	£10.88	£0.00	£0.00	£0.00	£3.44	£1.59	£15.91
Sainsbury's, Thetford	£13.59	£0.00	£0.00	£0.35	£0.16	£1.57	£15.66
Tesco, Kilverstone, Thetford	£34.07	£0.00	£0.00	£0.00	£5.29	£4.37	£43.74
Other Thetford	£23.80	£0.00	£0.00	£0.53	£0.32	£2.74	£27.39
Thetford sub-total	£103.22	£0.00	£0.00	£1.58	£10.41	£12.80	£128.01
Aldi, Dereham	£0.00	£21.54	£4.11	£0.56	£0.00	£1.38	£27.59
Lidl, Dereham	£0.00	£8.85	£2.63	£1.17	£0.00	£0.67	£13.32
Morrisons, Dereham	£0.08	£30.10	£0.96	£1.20	£0.16	£1.71	£34.20
Tesco, Dereham	£0.16	£29.56	£3.28	£8.12	£0.76	£2.20	£44.08
Other Dereham	£0.00	£17.84	£0.37	£1.16	£0.38	£1.04	£20.78
Dereham sub-total	£0.24	£107.88	£11.35	£12.21	£1.29	£7.00	£139.96
Asda, Swaffham	£0.00	£0.18	£5.89	£1.09	£0.00	£0.80	£7.96
Tesco, Swaffham	£0.32	£0.18	£18.64	£0.65	£0.00	£2.20	£21.98
Waitrose, Swaffham	£0.39	£1.39	£4.65	£0.93	£0.00	£0.82	£8.17
Other Swaffham	£0.72	£0.18	£3.90	£0.10	£0.00	£0.54	£5.44
Swaffham sub-total	£1.43	£1.92	£33.08	£2.77	£0.00	£4.35	£43.55
Lidl, Watton	£2.13	£0.41	£0.00	£7.60	£1.20	£0.23	£11.57
Tesco, Watton	£4.42	£0.48	£0.00	£24.83	£4.41	£0.70	£34.84
Other Watton	£0.00	£0.00	£0.00	£7.38	£0.00	£0.15	£7.53
Watton sub-total	£6.56	£0.88	£0.00	£39.81	£5.62	£1.08	£53.94
Sainsbury's, Attleborough	£0.27	£0.45	£0.00	£0.59	£21.38	£1.19	£23.89
Lidl, Attleborough	£1.39	£0.20	£0.00	£0.00	£18.08	£1.04	£20.70
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£2.81	£0.15	£2.96
Attleborough sub-total	£1.65	£0.65	£0.00	£0.59	£42.27	£2.38	£47.55
Other Breckland District	£0.30	£4.57	£3.81	£2.38	£6.23	£0.35	£17.65
Breckland District Total	£113.39	£115.91	£48.24	£59.34	£65.82	£27.96	£430.66
Brandon/Lakenheath	£34.16	£0.00	£0.58	£0.00	£0.00	n/a	£34.74
Bury St Edmunds	£3.96	£0.00	£0.00	£0.00	£0.56	n/a	£4.52
Diss	£0.47	£0.10	£0.00	£0.15	£15.20	n/a	£15.92
Downham Market	£1.11	£0.00	£0.12	£0.00	£0.00	n/a	£1.23
Fakenahm	£1.05	£4.80	£4.41	£0.00	£0.00	n/a	£10.25
Kings Lynn	£2.10	£0.78	£3.52	£0.65	£0.00	n/a	£7.06
Norwich	£0.70	£12.00	£0.00	£2.58	£2.56	n/a	£17.84
Wymondham	£0.86	£2.64	£0.00	£0.52	£8.02	n/a	£12.04
Elsewhere	£3.12	£3.30	£1.12	£0.00	£0.83	n/a	£8.37
TOTAL	£160.93	£139.52	£57.99	£63.24	£92.99	n/a	£542.63

Source: Table 3 and Table 4

Table 7 - Future 2036 convenience goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2036	£162.52	£140.77	£57.94	£63.82	£94.20		£519.25
Aldi, Thetford	£21.08	£0.00	£0.00	£0.71	£1.23	£2.56	£25.57
Lidl, Thetford	£10.99	£0.00	£0.00	£0.00	£3.48	£1.61	£16.08
Sainsbury's, Thetford	£13.72	£0.00	£0.00	£0.36	£0.16	£1.58	£15.82
Tesco, Kilverstone, Thetford	£34.41	£0.00	£0.00	£0.00	£5.36	£4.42	£44.19
Other Thetford	£24.04	£0.00	£0.00	£0.53	£0.32	£2.77	£27.66
Thetford sub-total	£104.24	£0.00	£0.00	£1.60	£10.55	£12.93	£129.31
Aldi, Dereham	£0.00	£21.73	£4.11	£0.56	£0.00	£1.39	£27.79
Lidl, Dereham	£0.00	£8.93	£2.63	£1.18	£0.00	£0.67	£13.41
Morrisons, Dereham	£0.08	£30.37	£0.95	£1.21	£0.16	£1.72	£34.49
Tesco, Dereham	£0.16	£29.82	£3.28	£8.20	£0.76	£2.22	£44.45
Other Dereham	£0.00	£18.00	£0.37	£1.17	£0.38	£1.05	£20.97
Dereham sub-total	£0.24	£108.85	£11.34	£12.32	£1.31	£7.06	£141.11
Asda, Swaffham	£0.00	£0.18	£5.89	£1.10	£0.00	£0.80	£7.97
Tesco, Swaffham	£0.32	£0.18	£18.62	£0.65	£0.00	£2.20	£21.97
Waitrose, Swaffham	£0.40	£1.40	£4.65	£0.93	£0.00	£0.82	£8.20
Other Swaffham	£0.73	£0.18	£3.89	£0.10	£0.00	£0.54	£5.45
Swaffham sub-total	£1.44	£1.94	£33.05	£2.79	£0.00	£4.36	£43.58
Lidl, Watton	£2.15	£0.41	£0.00	£7.67	£1.22	£0.23	£11.68
Tesco, Watton	£4.47	£0.48	£0.00	£25.05	£4.47	£0.70	£35.18
Other Watton	£0.00	£0.00	£0.00	£7.45	£0.00	£0.15	£7.60
Watton sub-total	£6.62	£0.89	£0.00	£40.17	£5.69	£1.09	£54.46
Sainsbury's, Attleborough	£0.27	£0.46	£0.00	£0.60	£21.65	£1.21	£24.19
Lidl, Attleborough	£1.40	£0.20	£0.00	£0.00	£18.32	£1.05	£20.97
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£2.85	£0.15	£3.00
Attleborough sub-total	£1.67	£0.66	£0.00	£0.60	£42.82	£2.41	£48.16
Other Breckland District	£0.30	£4.61	£3.81	£2.41	£6.32	£0.36	£17.79
Breckland District Total	£114.52	£116.94	£48.20	£59.88	£66.68	£28.20	£434.42
Brandon/Lakenheath	£34.50	£0.00	£0.58	£0.00	£0.00	n/a	£35.08
Bury St Edmunds	£4.00	£0.00	£0.00	£0.00	£0.57	n/a	£4.57
Diss	£0.48	£0.10	£0.00	£0.15	£15.39	n/a	£16.12
Downham Market	£1.12	£0.00	£0.12	£0.00	£0.00	n/a	£1.24
Fakenahm	£1.06	£4.84	£4.40	£0.00	£0.00	n/a	£10.30
Kings Lynn	£2.12	£0.79	£3.52	£0.66	£0.00	n/a	£7.09
Norwich	£0.71	£12.11	£0.00	£2.61	£2.59	n/a	£18.02
Wymondham	£0.87	£2.66	£0.00	£0.53	£8.13	n/a	£12.19
Elsewhere	£3.15	£3.33	£1.12	£0.00	£0.84	n/a	£8.44
TOTAL	£162.52	£140.77	£57.94	£63.82	£94.20	n/a	£547.45

Source: Table 3 and Table 4

Table 8 - Future 2041 convenience goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2041	£164.25	£141.98	£57.88	£64.28	£95.46		£523.86
Aldi, Thetford	£21.31	£0.00	£0.00	£0.71	£1.24	£2.58	£25.85
Lidl, Thetford	£11.10	£0.00	£0.00	£0.00	£3.53	£1.63	£16.26
Sainsbury's, Thetford	£13.87	£0.00	£0.00	£0.36	£0.16	£1.60	£15.99
Tesco, Kilverstone, Thetford	£34.78	£0.00	£0.00	£0.00	£5.43	£4.47	£44.68
Other Thetford	£24.30	£0.00	£0.00	£0.54	£0.32	£2.80	£27.95
Thetford sub-total	£105.35	£0.00	£0.00	£1.61	£10.69	£13.07	£130.72
Aldi, Dereham	£0.00	£21.92	£4.11	£0.57	£0.00	£1.40	£27.99
Lidl, Dereham	£0.00	£9.01	£2.63	£1.19	£0.00	£0.67	£13.49
Morrisons, Dereham	£0.08	£30.63	£0.95	£1.22	£0.16	£1.74	£34.78
Tesco, Dereham	£0.16	£30.08	£3.28	£8.26	£0.78	£2.24	£44.79
Other Dereham	£0.00	£18.15	£0.37	£1.18	£0.39	£1.06	£21.15
Dereham sub-total	£0.24	£109.79	£11.33	£12.41	£1.32	£7.11	£142.20
Asda, Swaffham	£0.00	£0.18	£5.88	£1.11	£0.00	£0.80	£7.97
Tesco, Swaffham	£0.32	£0.18	£18.60	£0.66	£0.00	£2.20	£21.96
Waitrose, Swaffham	£0.40	£1.41	£4.64	£0.94	£0.00	£0.82	£8.22
Other Swaffham	£0.73	£0.18	£3.89	£0.10	£0.00	£0.55	£5.45
Swaffham sub-total	£1.46	£1.95	£33.01	£2.81	£0.00	£4.36	£43.60
Lidl, Watton	£2.18	£0.41	£0.00	£7.72	£1.23	£0.24	£11.78
Tesco, Watton	£4.52	£0.49	£0.00	£25.23	£4.53	£0.71	£35.47
Other Watton	£0.00	£0.00	£0.00	£7.50	£0.00	£0.15	£7.66
Watton sub-total	£6.69	£0.90	£0.00	£40.46	£5.77	£1.10	£54.92
Sainsbury's, Attleborough	£0.27	£0.46	£0.00	£0.60	£21.94	£1.23	£24.51
Lidl, Attleborough	£1.41	£0.20	£0.00	£0.00	£18.57	£1.06	£21.24
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£2.89	£0.15	£3.04
Attleborough sub-total	£1.69	£0.67	£0.00	£0.60	£43.40	£2.44	£48.79
Other Breckland District	£0.31	£4.65	£3.80	£2.42	£6.40	£0.36	£17.94
Breckland District Total	£115.74	£117.95	£48.15	£60.31	£67.57	£28.44	£438.16
Brandon/Lakenheath	£34.86	£0.00	£0.58	£0.00	£0.00	n/a	£35.44
Bury St Edmunds	£4.05	£0.00	£0.00	£0.00	£0.57	n/a	£4.62
Diss	£0.48	£0.10	£0.00	£0.15	£15.60	n/a	£16.33
Downham Market	£1.13	£0.00	£0.12	£0.00	£0.00	n/a	£1.26
Fakenahm	£1.07	£4.88	£4.40	£0.00	£0.00	n/a	£10.35
Kings Lynn	£2.14	£0.80	£3.51	£0.66	£0.00	n/a	£7.12
Norwich	£0.72	£12.21	£0.00	£2.62	£2.63	n/a	£18.18
Wymondham	£0.88	£2.68	£0.00	£0.53	£8.24	n/a	£12.33
Elsewhere	£3.19	£3.35	£1.12	£0.00	£0.85	n/a	£8.51
TOTAL	£164.25	£141.98	£57.88	£64.28	£95.46	n/a	£552.30

Source: Table 3 and Table 4

Table 9 - Future 2046 convenience goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2046	£167.20	£144.14	£57.97	£65.20	£97.52		£532.04
Aldi, Thetford	£21.69	£0.00	£0.00	£0.72	£1.27	£2.63	£26.31
Lidl, Thetford	£11.30	£0.00	£0.00	£0.00	£3.60	£1.66	£16.56
Sainsbury's, Thetford	£14.12	£0.00	£0.00	£0.36	£0.16	£1.63	£16.27
Tesco, Kilverstone, Thetford	£35.40	£0.00	£0.00	£0.00	£5.55	£4.55	£45.50
Other Thetford	£24.73	£0.00	£0.00	£0.55	£0.33	£2.85	£28.45
Thetford sub-total	£107.24	£0.00	£0.00	£1.63	£10.92	£13.31	£133.10
Aldi, Dereham	£0.00	£22.25	£4.11	£0.58	£0.00	£1.42	£28.36
Lidl, Dereham	£0.00	£9.14	£2.63	£1.20	£0.00	£0.68	£13.66
Morrisons, Dereham	£0.08	£31.10	£0.96	£1.23	£0.17	£1.76	£35.30
Tesco, Dereham	£0.16	£30.54	£3.28	£8.37	£0.79	£2.27	£45.42
Other Dereham	£0.00	£18.43	£0.37	£1.20	£0.39	£1.07	£21.46
Dereham sub-total	£0.25	£111.46	£11.35	£12.58	£1.35	£7.21	£144.20
Asda, Swaffham	£0.00	£0.18	£5.89	£1.12	£0.00	£0.80	£8.00
Tesco, Swaffham	£0.33	£0.18	£18.63	£0.67	£0.00	£2.20	£22.01
Waitrose, Swaffham	£0.41	£1.43	£4.65	£0.96	£0.00	£0.83	£8.27
Other Swaffham	£0.75	£0.18	£3.89	£0.11	£0.00	£0.55	£5.48
Swaffham sub-total	£1.49	£1.98	£33.07	£2.85	£0.00	£4.38	£43.76
Lidl, Watton	£2.22	£0.42	£0.00	£7.83	£1.26	£0.24	£11.97
Tesco, Watton	£4.60	£0.49	£0.00	£25.60	£4.63	£0.72	£36.03
Other Watton	£0.00	£0.00	£0.00	£7.61	£0.00	£0.16	£7.77
Watton sub-total	£6.81	£0.91	£0.00	£41.04	£5.89	£1.12	£55.77
Sainsbury's, Attleborough	£0.28	£0.47	£0.00	£0.61	£22.42	£1.25	£25.03
Lidl, Attleborough	£1.44	£0.21	£0.00	£0.00	£18.96	£1.08	£21.70
Other Attleborough	£0.00	£0.00	£0.00	£0.00	£2.95	£0.16	£3.11
Attleborough sub-total	£1.72	£0.68	£0.00	£0.61	£44.33	£2.49	£49.83
Other Breckland District	£0.31	£4.72	£3.81	£2.46	£6.54	£0.36	£18.20
Breckland District Total	£117.81	£119.75	£48.23	£61.18	£69.03	£28.87	£444.86
Brandon/Lakenheath	£35.49	£0.00	£0.58	£0.00	£0.00	n/a	£36.07
Bury St Edmunds	£4.12	£0.00	£0.00	£0.00	£0.58	n/a	£4.70
Diss	£0.49	£0.10	£0.00	£0.15	£15.94	n/a	£16.68
Downham Market	£1.15	£0.00	£0.12	£0.00	£0.00	n/a	£1.28
Fakenahm	£1.09	£4.95	£4.41	£0.00	£0.00	n/a	£10.45
Kings Lynn	£2.18	£0.81	£3.52	£0.67	£0.00	n/a	£7.18
Norwich	£0.73	£12.40	£0.00	£2.66	£2.68	n/a	£18.47
Wymondham	£0.89	£2.72	£0.00	£0.54	£8.41	n/a	£12.57
Elsewhere	£3.24	£3.41	£1.12	£0.00	£0.87	n/a	£8.64
TOTAL	£167.20	£144.14	£57.97	£65.20	£97.52	n/a	£560.90

Source: Table 3 and Table 4

Table 10 - Main food stores convenience goods sales floorspace and benchmark turnover

Store	Sales floorspace (sq m net)	Convenience goods floorspace (%)	Convenience goods floorspace (sq m net)	Turnover (£ per sq m)	Total turnover (£m)
Aldi, Lime Kiln Lane, Thetford	844	80%	675	£11,748	£7.93
Lidl, Forest RP, Thetford	873	80%	698	£8,585	£6.00
Sainsbury's, Forest RP, Thetford	2,423	85%	2,060	£13,869	£28.56
Tesco, Kilverstone, Thetford	4,441	70%	3,109	£16,226	£50.44
B&M Bargains, Breckland RP, Thetford	1,525	30%	458	£3,546	£1.62
Budgens, A11 Bypass, Thetford	84	95%	80	£8,666	£0.69
Farmfood, Lime Kiln Lane, Thetford	400	95%	380	£5,622	£2.14
Home Bargains, London Road, Thetford	964	30%	289	£6,731	£1.95
Iceland, Minstergate, Thetford	420	95%	399	£7,180	£2.86
The Food Warehouse, Breckland RP, Thetford	737	95%	700	£7,180	£5.03
M&S Simply Food, Norwich Road, Thetford	84	95%	80	£10,934	£0.87
Tesco Express, Norwich Road, Thetford	175	95%	166	£16,226	£2.70
Thetford sub-total	12,970		9,094		£110.79
Aldi, Napier Way, Dereham	1,014	80%	811	£11,748	£9.53
Lidl, Kingston Road, Dereham	895	80%	716	£11,438	£8.19
Morrisons, Station Road, Dereham	3,952	70%	2,766	£10,904	£30.16
Tesco Extra, Kingston Road, Dereham	6,210	60%	3,726	£16,226	£60.46
Co-op, Market Place, Dereham	323	95%	307	£12,059	£3.70
Co-op, Shipdham Road, Dereham	159	95%	151	£12,059	£1.82
Co-op, Swaffham Road, Dereham	912	90%	821	£12,059	£9.90
Iceland, Nelson Place, Dereham	539	95%	512	£7,180	£3.68
Dereham sub-total	14,004		9,810		£127.44
Asda, Lynn Street, Swaffham	909	90%	818	£11,105	£9.09
Tesco, Brocks Road, Swaffham	2,050	85%	1,743	£16,226	£28.27
Waitrose, Castle Acre Road, Swaffham	1,940	90%	1,746	£15,126	£26.41
Iceland, Market Place, Swaffham	483	95%	459	£7,180	£3.29
Morrisons Daily, Martket Place, Swaffham	129	95%	123	£10,904	£1.34
Swaffham sub-total	5,511		4,888		£68.40
Lidl, Norwich Road, Watton	1,032	80%	826	£8,585	£7.09
Tesco, Thetford Road, Watton	1,793	90%	1,614	£16,226	£26.18
Watton sub-total	2,825		2,439		£33.27
Lidl, Queens Road, Attleborough	995	80%	796	£8,585	£6.83
Sainsbury's, High Street, Attleborough	1,480	90%	1,332	£13,869	£18.47
M&S Simply Food, Attleborough	84	95%	80	£10,934	£0.87
Attleborough sub-total	2,559		2,208		£26.18
Asda Express, Eccles	84	95%	80	£11,105	£0.89
Asda Express, Necton	84	95%	80	£11,105	£0.89
Budgens, Weeting	84	95%	80	£8,666	£0.69
Co-op, East Harling	912	90%	821	£12,059	£9.90
Morrisons Daily, Bawdeswell	129	95%	123	£10,904	£1.34
Other sub-total	1,293		1,183		£13.70
Total	39,162		29,622		£379.78

Source: ORC Storepoint 2025 sales floorspace and Globaldata company average sales densities.

Table 11 - Summary of convenience goods expenditure 2025 to 2046 (£m)

	2025	2031	2036	2041	2046
Available expenditure					
Thetford	127.23	128.01	129.31	130.72	133.10
Dereham	138.94	139.96	141.11	142.20	144.20
Swaffham	43.46	43.55	43.58	43.60	43.76
Watton	53.58	53.94	54.46	54.92	55.77
Attleborough	46.92	47.55	48.16	48.79	49.83
Other Breckland	17.50	17.65	17.79	17.94	18.20
Total	427.63	430.66	434.42	438.16	444.86
Turnover of existing facilities					
Thetford	127.23	127.23	126.59	125.96	125.33
Dereham	138.94	138.94	138.25	137.56	136.87
Swaffham	43.46	43.46	43.24	43.02	42.81
Watton	53.58	53.58	53.31	53.05	52.78
Attleborough	46.92	46.92	46.69	46.46	46.23
Other Breckland	17.50	17.50	17.42	17.33	17.24
Total	427.63	427.63	425.50	423.38	421.26
Surplus/deficit expenditure					
Thetford	-	-	2.72	4.76	7.77
Dereham	-	-	2.86	4.64	7.33
Swaffham	-	-	0.34	0.57	0.95
Watton	-	-	1.15	1.87	2.99
Attleborough	-	-	1.47	2.34	3.60
Other Breckland	-	-	0.38	0.61	0.96
Total	-	-	8.92	14.78	23.60

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b

Table 12 - Convenience goods floorspace capacity up to 2046 (cumulative)

	2025	2031	2036	2041	2046
Turnover density new floorspace (£ per sq m) *	£12,845	£12,845	£12,781	£12,717	£12,654
Floorspace projection (sq m net)					
Thetford	-	-	213	374	614
Dereham	-	-	224	365	579
Swaffham	-	-	26	45	75
Watton	-	-	90	147	236
Attleborough	-	-	115	184	285
Other Breckland	-	-	30	48	76
Total	-	-	698	1,162	1,865
Floorspace projection (sq m gross)					
Thetford	-	-	304	535	877
Dereham	-	-	320	521	827
Swaffham	-	-	38	64	107
Watton	-	-	128	210	338
Attleborough	-	-	164	262	407
Other Breckland	-	-	42	68	108
Total	-	-	997	1,661	2,664

Source: Table 11 and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b

Figures may not sum due to rounding

* combined company average sales density for 8 main food store operators (Aldi, Asda, Lidl, M&S, Morrisons, Sainsbury's, Tesco and Waitrose)

Appendix 3 Comparison goods capacity

Table 1 - Study area population projections

Zone	2025	2031	2036	2041	2046
1 - Thetford	60,751	62,976	64,723	66,427	68,095
2 - Dereham	48,282	50,184	51,527	52,777	53,957
3 - Swaffham	19,532	20,164	20,501	20,797	20,977
4 - Watton	22,284	23,112	23,735	24,277	24,800
5 - Attleborough	31,812	33,255	34,282	35,280	36,293
Total	182,661	189,691	194,768	199,558	204,121

Sources: Experian population projections March 2025.

Table 2 - Comparison goods expenditure per person per annum (£)

Zone	2025	2031	2036	2041	2046
1 - Thetford	2,772	3,090	3,432	3,826	4,358
2 - Dereham	3,169	3,531	3,922	4,373	4,982
3 - Swaffham	3,109	3,464	3,848	4,290	4,887
4 - Watton	2,964	3,303	3,669	4,091	4,660
5 - Attleborough	3,169	3,531	3,922	4,373	4,982

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Excludes Special Forms of Trading (SFT)

Table 3 - Total comparison goods expenditure (£M)

Zone	2025	2031	2036	2041	2046
1 - Thetford	168.43	194.57	222.12	254.15	296.78
2 - Dereham	153.00	177.22	202.11	230.80	268.79
3 - Swaffham	60.72	69.85	78.89	89.22	102.51
4 - Watton	66.06	76.35	87.09	99.31	115.56
5 - Attleborough	100.81	117.44	134.47	154.28	180.79
Total	549.01	635.43	724.68	827.76	964.45

Source: Tables 1 and 2

Table 4 - Base year 2025 comparison goods market shares by zone (%)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow
Thetford town centre	17.2%	0.0%	0.0%	1.5%	2.4%	5.0%
Thetford other	42.0%	0.5%	1.2%	5.9%	17.3%	5.0%
Dereham town centre	0.0%	41.2%	7.8%	12.4%	1.4%	5.0%
Dereham other	0.1%	14.2%	4.6%	7.2%	0.1%	5.0%
Swaffham	0.4%	0.1%	22.9%	2.5%	0.0%	5.0%
Watton	0.9%	1.2%	0.3%	36.4%	3.3%	2.0%
Attleborough	0.2%	0.3%	0.2%	1.2%	16.8%	5.0%
Other Breckland District	0.4%	1.2%	1.4%	1.9%	1.1%	2.0%
Breckland District Total	61.2%	58.8%	38.3%	69.0%	42.4%	n/a
Brandon / Lakenheath	4.0%	0.1%	0.0%	0.1%	0.4%	n/a
Bury St Edmunds	18.6%	0.0%	0.0%	1.0%	4.2%	n/a
Diss	0.4%	0.1%	0.0%	0.0%	14.3%	n/a
Downham Market	0.2%	0.0%	0.4%	0.3%	0.0%	n/a
Fakenham	0.1%	5.8%	7.7%	0.7%	0.1%	n/a
Kings Lynn	4.3%	0.2%	31.5%	2.2%	0.0%	n/a
Norwich	7.1%	28.2%	18.6%	23.1%	32.8%	n/a
Wymondham	0.1%	1.9%	0.0%	1.1%	3.2%	n/a
Elsewhere	4.2%	5.0%	3.4%	2.5%	2.7%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2025 and Lichfields' analysis.

Table 5 - Base year 2025 comparison goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2025	£168.43	£153.00	£60.72	£66.06	£100.81		£549.01
Thetford town centre	£28.99	£0.00	£0.00	£0.97	£2.47	£1.71	£34.13
Thetford other	£70.80	£0.82	£0.75	£3.86	£17.46	£4.93	£98.63
Dereham town centre	£0.03	£62.98	£4.73	£8.20	£1.44	£4.07	£81.45
Dereham other	£0.13	£21.74	£2.80	£4.76	£0.11	£1.55	£31.10
Swaffham	£0.60	£0.21	£13.88	£1.67	£0.00	£0.86	£17.23
Watton	£1.52	£1.89	£0.17	£24.08	£3.28	£0.63	£31.56
Attleborough	£0.32	£0.47	£0.09	£0.78	£16.91	£0.98	£19.54
Other Breckland District	£0.63	£1.80	£0.83	£1.27	£1.09	£0.11	£5.74
Breckland District Total	£103.01	£89.91	£23.25	£45.59	£42.76	£14.85	£319.37
Brandon / Lakenheath	£6.71	£0.11	£0.00	£0.07	£0.43	n/a	£7.32
Bury St Edmunds	£31.26	£0.00	£0.00	£0.63	£4.20	n/a	£36.10
Diss	£0.64	£0.21	£0.00	£0.00	£14.41	n/a	£15.26
Downham Market	£0.34	£0.00	£0.25	£0.20	£0.00	n/a	£0.79
Fakenham	£0.10	£8.88	£4.69	£0.46	£0.06	n/a	£14.19
Kings Lynn	£7.20	£0.23	£19.15	£1.47	£0.00	n/a	£28.05
Norwich	£12.01	£43.11	£11.31	£15.28	£33.03	n/a	£114.74
Wymondham	£0.12	£2.84	£0.03	£0.71	£3.19	n/a	£6.89
Elsewhere	£7.03	£7.71	£2.04	£1.64	£2.72	n/a	£21.15
TOTAL	£168.43	£153.00	£60.72	£66.06	£100.81	n/a	£563.86

Source: Table 3 and Table 4

Table 6 - Future 2031 comparison goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2031	£194.57	£177.22	£69.85	£76.35	£117.44		£635.43
Thetford town centre	£33.49	£0.00	£0.00	£1.12	£2.87	£1.97	£39.45
Thetford other	£81.79	£0.95	£0.87	£4.47	£20.34	£5.71	£114.12
Dereham town centre	£0.03	£72.95	£5.44	£9.47	£1.68	£4.71	£94.29
Dereham other	£0.15	£25.18	£3.22	£5.50	£0.13	£1.80	£35.98
Swaffham	£0.70	£0.25	£15.97	£1.93	£0.00	£0.99	£19.84
Watton	£1.76	£2.18	£0.20	£27.83	£3.82	£0.73	£36.51
Attleborough	£0.37	£0.54	£0.11	£0.90	£19.69	£1.14	£22.74
Other Breckland District	£0.73	£2.09	£0.95	£1.47	£1.27	£0.13	£6.65
Breckland District Total	£119.00	£104.15	£26.74	£52.70	£49.81	£17.18	£369.59
Brandon / Lakenheath	£7.75	£0.12	£0.00	£0.08	£0.51	n/a	£8.46
Bury St Edmunds	£36.11	£0.00	£0.00	£0.73	£4.89	n/a	£41.74
Diss	£0.74	£0.24	£0.00	£0.00	£16.79	n/a	£17.77
Downham Market	£0.39	£0.00	£0.29	£0.23	£0.00	n/a	£0.91
Fakenham	£0.12	£10.28	£5.39	£0.54	£0.07	n/a	£16.40
Kings Lynn	£8.31	£0.27	£22.03	£1.70	£0.00	n/a	£32.31
Norwich	£13.87	£49.93	£13.02	£17.67	£38.48	n/a	£132.96
Wymondham	£0.14	£3.29	£0.03	£0.82	£3.72	n/a	£8.00
Elsewhere	£8.13	£8.93	£2.35	£1.90	£3.17	n/a	£24.48
TOTAL	£194.57	£177.22	£69.85	£76.35	£117.44	n/a	£652.62

Source: Table 3 and Table 4

Table 7 - Future 2036 comparison goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2036	£222.12	£202.11	£78.89	£87.09	£134.47		£724.68
Thetford town centre	£38.23	£0.00	£0.00	£1.28	£3.29	£2.25	£45.04
Thetford other	£93.36	£1.09	£0.98	£5.10	£23.29	£6.52	£130.33
Dereham town centre	£0.04	£83.20	£6.14	£10.81	£1.92	£5.37	£107.48
Dereham other	£0.17	£28.72	£3.64	£6.28	£0.15	£2.05	£41.00
Swaffham	£0.80	£0.28	£18.03	£2.20	£0.00	£1.12	£22.44
Watton	£2.00	£2.49	£0.22	£31.74	£4.38	£0.83	£41.67
Attleborough	£0.42	£0.61	£0.12	£1.03	£22.55	£1.30	£26.03
Other Breckland District	£0.84	£2.38	£1.07	£1.68	£1.46	£0.15	£7.58
Breckland District Total	£135.85	£118.78	£30.20	£60.11	£57.04	£19.60	£421.58
Brandon / Lakenheath	£8.85	£0.14	£0.00	£0.09	£0.58	n/a	£9.66
Bury St Edmunds	£41.22	£0.00	£0.00	£0.84	£5.60	n/a	£47.66
Diss	£0.85	£0.28	£0.00	£0.00	£19.22	n/a	£20.35
Downham Market	£0.45	£0.00	£0.33	£0.26	£0.00	n/a	£1.03
Fakenham	£0.14	£11.73	£6.09	£0.61	£0.08	n/a	£18.64
Kings Lynn	£9.49	£0.30	£24.88	£1.94	£0.00	n/a	£36.61
Norwich	£15.83	£56.94	£14.70	£20.15	£44.06	n/a	£151.69
Wymondham	£0.16	£3.76	£0.03	£0.93	£4.26	n/a	£9.15
Elsewhere	£9.28	£10.19	£2.65	£2.16	£3.63	n/a	£27.91
TOTAL	£222.12	£202.11	£78.89	£87.09	£134.47	n/a	£744.28

Source: Table 3 and Table 4

Table 8 - Future 2041 comparison goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2041	£254.15	£230.80	£89.22	£99.31	£154.28		£827.76
Thetford town centre	£43.74	£0.00	£0.00	£1.46	£3.77	£2.58	£51.54
Thetford other	£106.83	£1.24	£1.11	£5.81	£26.72	£7.46	£149.17
Dereham town centre	£0.04	£95.01	£6.95	£12.32	£2.20	£6.13	£122.66
Dereham other	£0.19	£32.80	£4.11	£7.16	£0.18	£2.34	£46.77
Swaffham	£0.91	£0.32	£20.39	£2.51	£0.00	£1.27	£25.41
Watton	£2.29	£2.85	£0.25	£36.20	£5.02	£0.95	£47.55
Attleborough	£0.48	£0.70	£0.14	£1.18	£25.87	£1.49	£29.85
Other Breckland District	£0.96	£2.72	£1.21	£1.91	£1.67	£0.17	£8.65
Breckland District Total	£155.44	£135.63	£34.16	£68.54	£65.44	£22.39	£481.61
Brandon / Lakenheath	£10.13	£0.16	£0.00	£0.10	£0.66	n/a	£11.05
Bury St Edmunds	£47.17	£0.00	£0.00	£0.95	£6.43	n/a	£54.55
Diss	£0.97	£0.32	£0.00	£0.00	£22.06	n/a	£23.34
Downham Market	£0.51	£0.00	£0.37	£0.30	£0.00	n/a	£1.18
Fakenham	£0.16	£13.39	£6.89	£0.70	£0.09	n/a	£21.22
Kings Lynn	£10.86	£0.35	£28.14	£2.21	£0.00	n/a	£41.55
Norwich	£18.12	£65.02	£16.62	£22.98	£50.55	n/a	£173.29
Wymondham	£0.19	£4.29	£0.04	£1.06	£4.89	n/a	£10.47
Elsewhere	£10.61	£11.64	£3.00	£2.47	£4.17	n/a	£31.88
TOTAL	£254.15	£230.80	£89.22	£99.31	£154.28	n/a	£850.15

Source: Table 3 and Table 4

Table 9 - Future 2046 comparison goods expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2046	£296.78	£268.79	£102.51	£115.56	£180.79		£964.45
Thetford town centre	£51.08	£0.00	£0.00	£1.69	£4.42	£3.01	£60.20
Thetford other	£124.75	£1.44	£1.27	£6.76	£31.31	£8.71	£174.25
Dereham town centre	£0.05	£110.65	£7.98	£14.34	£2.58	£7.14	£142.74
Dereham other	£0.23	£38.19	£4.72	£8.33	£0.21	£2.72	£54.40
Swaffham	£1.07	£0.38	£23.43	£2.93	£0.00	£1.46	£29.26
Watton	£2.68	£3.31	£0.29	£42.12	£5.88	£1.11	£55.39
Attleborough	£0.56	£0.82	£0.16	£1.37	£30.32	£1.75	£34.96
Other Breckland District	£1.12	£3.17	£1.40	£2.23	£1.96	£0.20	£10.06
Breckland District Total	£181.52	£157.96	£39.25	£79.76	£76.68	£26.10	£561.27
Brandon / Lakenheath	£11.83	£0.19	£0.00	£0.12	£0.78	n/a	£12.91
Bury St Edmunds	£55.08	£0.00	£0.00	£1.11	£7.53	n/a	£63.73
Diss	£1.13	£0.37	£0.00	£0.00	£25.85	n/a	£27.34
Downham Market	£0.60	£0.00	£0.42	£0.34	£0.00	n/a	£1.37
Fakenham	£0.18	£15.59	£7.92	£0.81	£0.10	n/a	£24.61
Kings Lynn	£12.68	£0.40	£32.33	£2.57	£0.00	n/a	£47.99
Norwich	£21.15	£75.73	£19.10	£26.74	£59.24	n/a	£201.96
Wymondham	£0.22	£4.99	£0.04	£1.24	£5.73	n/a	£12.22
Elsewhere	£12.39	£13.55	£3.45	£2.87	£4.88	n/a	£37.15
TOTAL	£296.78	£268.79	£102.51	£115.56	£180.79	n/a	£990.55

Source: Table 3 and Table 4

Table 10 - Summary of comparison goods expenditure 2025 to 2046 (£m)

	2025	2031	2036	2041	2046
Available expenditure					
Thetford	132.76	153.57	175.38	200.71	234.45
Dereham	112.54	130.27	148.48	169.43	197.14
Swaffham	17.23	19.84	22.44	25.41	29.26
Watton	31.56	36.51	41.67	47.55	55.39
Attleborough	19.54	22.74	26.03	29.85	34.96
Other Breckland	5.74	6.65	7.58	8.65	10.06
Total	319.37	369.59	421.58	481.61	561.27
Turnover of existing facilities					
Thetford	132.76	151.12	169.32	189.71	212.55
Dereham	112.54	128.11	143.54	160.82	180.19
Swaffham	17.23	19.62	21.98	24.62	27.59
Watton	31.56	35.93	40.26	45.10	50.53
Attleborough	19.54	22.24	24.92	27.92	31.28
Other Breckland	5.74	6.54	7.32	8.21	9.19
Total	319.37	363.55	407.33	456.38	511.33
Surplus/deficit expenditure					
Thetford	-	2.45	6.06	11.01	21.91
Dereham	-	2.16	4.95	8.60	16.95
Swaffham	-	0.22	0.46	0.79	1.67
Watton	-	0.59	1.41	2.45	4.86
Attleborough	-	0.50	1.12	1.94	3.68
Other Breckland	-	0.11	0.25	0.44	0.87
Total	-	6.03	14.25	25.23	49.94

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b

Table 11 - Comparison goods floorspace capacity up to 2046 (cumulative)

	2025	2031	2036	2041	2046
Turnover density new floorspace (£ per sq m)	£7,000	£7,968	£8,928	£10,003	£11,207
Floorspace projection (sq m net)					
Thetford	0	307	678	1,100	1,955
Dereham	0	271	554	860	1,512
Swaffham	0	28	52	79	149
Watton	0	73	158	245	433
Attleborough	0	63	125	194	329
Other Breckland	0	14	28	44	78
Total	0	757	1,596	2,522	4,456
Floorspace projection (sq m gross)					
Thetford	0	439	969	1,572	2,792
Dereham	0	387	791	1,229	2,160
Swaffham	0	40	74	113	213
Watton	0	105	226	350	619
Attleborough	0	90	179	277	470
Other Breckland	0	20	40	63	111
Total	0	1,081	2,279	3,603	6,365

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 22 - Figure 4b

Figures may not sum due to rounding

Appendix 4 Food/beverage capacity

Table 1 - Study area population projections

Zone	2025	2031	2036	2041	2046
1 - Thetford	60,751	62,976	64,723	66,427	68,095
2 - Dereham	48,282	50,184	51,527	52,777	53,957
3 - Swaffham	19,532	20,164	20,501	20,797	20,977
4 - Watton	22,284	23,112	23,735	24,277	24,800
5 - Attleborough	31,812	33,255	34,282	35,280	36,293
Total	182,661	189,691	194,768	199,558	204,121

Sources: Experian population projections March 2025.

Table 2 - Foods and beverage expenditure per person per annum (£)

Zone	2025	2031	2036	2041	2046
1 - Thetford	1,388	1,435	1,486	1,539	1,595
2 - Dereham	1,579	1,632	1,690	1,750	1,814
3 - Swaffham	1,557	1,609	1,666	1,725	1,788
4 - Watton	1,488	1,538	1,592	1,649	1,709
5 - Attleborough	1,492	1,542	1,596	1,653	1,713

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Table 3 - Total food and beverage expenditure (£M)

Zone	2025	2031	2036	2041	2046
1 - Thetford	84.35	90.36	96.17	102.20	108.59
2 - Dereham	76.25	81.91	87.08	92.36	97.88
3 - Swaffham	30.41	32.44	34.15	35.87	37.51
4 - Watton	33.15	35.54	37.79	40.02	42.38
5 - Attleborough	47.46	51.27	54.73	58.32	62.18
Total	271.62	291.51	309.92	328.78	348.54

Source: Tables 1 and 2

Table 4 - Base year 2025 food and beverage market shares by zone (%)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow
Thetford	48.7%	0.0%	0.0%	2.9%	10.5%	10.0%
Dereham	0.0%	49.3%	14.0%	9.7%	2.2%	5.0%
Swaffham	0.3%	0.0%	19.6%	3.8%	0.0%	10.0%
Watton	0.0%	0.0%	0.0%	16.5%	2.8%	2.0%
Attleborough	3.7%	1.0%	0.0%	0.0%	24.8%	5.0%
Other Breckland District	3.8%	14.3%	13.5%	27.7%	9.9%	2.0%
Breckland District Total	56.5%	64.6%	47.1%	60.7%	50.2%	n/a
Brandon / Lakenheath	5.1%	0.0%	3.5%	0.0%	0.0%	n/a
Bury St Edmunds	13.1%	0.3%	0.0%	1.0%	5.5%	n/a
Diss	0.3%	0.0%	0.0%	0.0%	4.1%	n/a
Downham Market	3.2%	0.0%	2.8%	0.0%	0.0%	n/a
Ely	2.4%	0.0%	0.0%	0.0%	0.0%	n/a
Fakenham	0.0%	2.6%	3.0%	1.0%	0.0%	n/a
Kings Lynn	2.0%	0.0%	15.2%	2.5%	0.1%	n/a
Norwich	2.6%	15.6%	10.9%	19.1%	24.3%	n/a
Wymondham	0.0%	1.9%	0.0%	0.0%	0.0%	n/a
Elsewhere	14.9%	15.0%	17.5%	15.7%	15.8%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2025 and Lichfields' analysis.

Table 5 - Base year 2025 food and beverage expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2025	£84.35	£76.25	£30.41	£33.15	£47.46		£271.62
Thetford	£41.09	£0.00	£0.00	£0.96	£4.97	£5.22	£52.25
Dereham	£0.00	£37.56	£4.25	£3.23	£1.06	£2.43	£48.52
Swaffham	£0.24	£0.00	£5.95	£1.27	£0.00	£0.83	£8.29
Watton	£0.00	£0.00	£0.00	£5.47	£1.34	£0.14	£6.95
Attleborough	£3.14	£0.79	£0.00	£0.00	£11.75	£0.83	£16.52
Other Breckland District	£3.19	£10.90	£4.11	£9.19	£4.69	£0.65	£32.74
Breckland District Total	£47.66	£49.25	£14.32	£20.11	£23.82	£10.10	£165.27
Brandon / Lakenheath	£4.26	£0.00	£1.05	£0.00	£0.00	n/a	£5.32
Bury St Edmunds	£11.03	£0.21	£0.00	£0.34	£2.61	n/a	£14.20
Diss	£0.24	£0.00	£0.00	£0.00	£1.95	n/a	£2.19
Downham Market	£2.69	£0.00	£0.85	£0.00	£0.00	n/a	£3.54
Ely	£2.02	£0.00	£0.00	£0.00	£0.00	n/a	£2.02
Fakenham	£0.00	£2.01	£0.90	£0.34	£0.00	n/a	£3.25
Kings Lynn	£1.68	£0.00	£4.64	£0.82	£0.07	n/a	£7.21
Norwich	£2.20	£11.91	£3.32	£6.33	£11.52	n/a	£35.28
Wymondham	£0.00	£1.43	£0.00	£0.00	£0.00	n/a	£1.43
Elsewhere	£12.56	£11.45	£5.33	£5.20	£7.49	n/a	£42.02
TOTAL	£84.35	£76.25	£30.41	£33.15	£47.46	n/a	£281.72

Source: Table 3 and Table 4

Table 6 - Future 2031 food and beverage expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2031	£90.36	£81.91	£32.44	£35.54	£51.27		£291.51
Thetford	£44.02	£0.00	£0.00	£1.03	£5.37	£5.60	£56.02
Dereham	£0.00	£40.34	£4.53	£3.46	£1.14	£2.60	£52.08
Swaffham	£0.25	£0.00	£6.35	£1.36	£0.00	£0.89	£8.86
Watton	£0.00	£0.00	£0.00	£5.86	£1.45	£0.15	£7.46
Attleborough	£3.37	£0.85	£0.00	£0.00	£12.70	£0.89	£17.81
Other Breckland District	£3.42	£11.71	£4.39	£9.85	£5.07	£0.70	£35.14
Breckland District Total	£51.06	£52.91	£15.28	£21.56	£25.73	£10.83	£177.37
Brandon / Lakenheath	£4.57	£0.00	£1.12	£0.00	£0.00	n/a	£5.69
Bury St Edmunds	£11.82	£0.23	£0.00	£0.37	£2.82	n/a	£15.23
Diss	£0.25	£0.00	£0.00	£0.00	£2.11	n/a	£2.36
Downham Market	£2.88	£0.00	£0.91	£0.00	£0.00	n/a	£3.79
Ely	£2.16	£0.00	£0.00	£0.00	£0.00	n/a	£2.16
Fakenham	£0.00	£2.16	£0.96	£0.37	£0.00	n/a	£3.49
Kings Lynn	£1.80	£0.00	£4.95	£0.88	£0.07	n/a	£7.71
Norwich	£2.36	£12.79	£3.54	£6.78	£12.45	n/a	£37.93
Wymondham	£0.00	£1.53	£0.00	£0.00	£0.00	n/a	£1.53
Elsewhere	£13.45	£12.29	£5.68	£5.57	£8.09	n/a	£45.09
TOTAL	£90.36	£81.91	£32.44	£35.54	£51.27	n/a	£302.35

Source: Table 3 and Table 4

Table 7 - Future 2036 food and beverage expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2036	£96.17	£87.08	£34.15	£37.79	£54.73		£309.92
Thetford	£46.85	£0.00	£0.00	£1.10	£5.73	£5.96	£59.64
Dereham	£0.00	£42.89	£4.77	£3.68	£1.22	£2.77	£55.33
Swaffham	£0.27	£0.00	£6.69	£1.45	£0.00	£0.93	£9.34
Watton	£0.00	£0.00	£0.00	£6.23	£1.55	£0.16	£7.94
Attleborough	£3.58	£0.91	£0.00	£0.00	£13.55	£0.95	£18.99
Other Breckland District	£3.64	£12.45	£4.62	£10.47	£5.41	£0.75	£37.34
Breckland District Total	£54.34	£56.25	£16.08	£22.92	£27.47	£11.52	£188.59
Brandon / Lakenheath	£4.86	£0.00	£1.18	£0.00	£0.00	n/a	£6.04
Bury St Edmunds	£12.58	£0.24	£0.00	£0.39	£3.01	n/a	£16.22
Diss	£0.27	£0.00	£0.00	£0.00	£2.25	n/a	£2.52
Downham Market	£3.07	£0.00	£0.96	£0.00	£0.00	n/a	£4.02
Ely	£2.30	£0.00	£0.00	£0.00	£0.00	n/a	£2.30
Fakenham	£0.00	£2.29	£1.01	£0.39	£0.00	n/a	£3.70
Kings Lynn	£1.92	£0.00	£5.21	£0.94	£0.08	n/a	£8.14
Norwich	£2.51	£13.60	£3.73	£7.21	£13.29	n/a	£40.34
Wymondham	£0.00	£1.63	£0.00	£0.00	£0.00	n/a	£1.63
Elsewhere	£14.32	£13.07	£5.98	£5.93	£8.63	n/a	£47.93
TOTAL	£96.17	£87.08	£34.15	£37.79	£54.73	n/a	£321.44

Source: Table 3 and Table 4

Table 8 - Future 2041 food and beverage expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2041	£102.20	£92.36	£35.87	£40.02	£58.32		£328.78
Thetford	£49.79	£0.00	£0.00	£1.16	£6.11	£6.34	£63.40
Dereham	£0.00	£45.49	£5.01	£3.89	£1.30	£2.93	£58.64
Swaffham	£0.29	£0.00	£7.03	£1.54	£0.00	£0.98	£9.83
Watton	£0.00	£0.00	£0.00	£6.60	£1.65	£0.17	£8.42
Attleborough	£3.81	£0.96	£0.00	£0.00	£14.44	£1.01	£20.22
Other Breckland District	£3.87	£13.20	£4.85	£11.09	£5.77	£0.79	£39.57
Breckland District Total	£57.75	£59.66	£16.89	£24.28	£29.27	£12.23	£200.08
Brandon / Lakenheath	£5.16	£0.00	£1.24	£0.00	£0.00	n/a	£6.41
Bury St Edmunds	£13.37	£0.26	£0.00	£0.42	£3.21	n/a	£17.25
Diss	£0.29	£0.00	£0.00	£0.00	£2.40	n/a	£2.69
Downham Market	£3.26	£0.00	£1.00	£0.00	£0.00	n/a	£4.26
Ely	£2.45	£0.00	£0.00	£0.00	£0.00	n/a	£2.45
Fakenham	£0.00	£2.43	£1.06	£0.42	£0.00	n/a	£3.91
Kings Lynn	£2.04	£0.00	£5.47	£0.99	£0.08	n/a	£8.59
Norwich	£2.67	£14.43	£3.92	£7.64	£14.16	n/a	£42.81
Wymondham	£0.00	£1.73	£0.00	£0.00	£0.00	n/a	£1.73
Elsewhere	£15.22	£13.86	£6.29	£6.28	£9.20	n/a	£50.84
TOTAL	£102.20	£92.36	£35.87	£40.02	£58.32	n/a	£341.01

Source: Table 3 and Table 4

Table 9 - Future 2046 food and beverage expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2046	£108.59	£97.88	£37.51	£42.38	£62.18		£348.54
Thetford	£52.90	£0.00	£0.00	£1.23	£6.52	£6.74	£67.38
Dereham	£0.00	£48.21	£5.24	£4.12	£1.39	£3.10	£62.07
Swaffham	£0.30	£0.00	£7.35	£1.63	£0.00	£1.03	£10.31
Watton	£0.00	£0.00	£0.00	£6.99	£1.76	£0.18	£8.93
Attleborough	£4.05	£1.02	£0.00	£0.00	£15.40	£1.08	£21.54
Other Breckland District	£4.11	£13.99	£5.07	£11.74	£6.15	£0.84	£41.91
Breckland District Total	£61.36	£63.22	£17.66	£25.71	£31.21	£12.97	£212.13
Brandon / Lakenheath	£5.49	£0.00	£1.30	£0.00	£0.00	n/a	£6.79
Bury St Edmunds	£14.20	£0.27	£0.00	£0.44	£3.42	n/a	£18.33
Diss	£0.30	£0.00	£0.00	£0.00	£2.56	n/a	£2.86
Downham Market	£3.46	£0.00	£1.05	£0.00	£0.00	n/a	£4.51
Ely	£2.60	£0.00	£0.00	£0.00	£0.00	n/a	£2.60
Fakenham	£0.00	£2.58	£1.11	£0.44	£0.00	n/a	£4.13
Kings Lynn	£2.17	£0.00	£5.72	£1.05	£0.09	n/a	£9.03
Norwich	£2.84	£15.29	£4.10	£8.09	£15.10	n/a	£45.41
Wymondham	£0.00	£1.83	£0.00	£0.00	£0.00	n/a	£1.83
Elsewhere	£16.17	£14.69	£6.57	£6.65	£9.81	n/a	£53.89
TOTAL	£108.59	£97.88	£37.51	£42.38	£62.18	n/a	£361.50

Source: Table 3 and Table 4

Table 10 - Summary of food and beverage expenditure 2025 to 2046 (£m)

	2025	2031	2036	2041	2046
Available expenditure					
Thetford	52.25	56.02	59.64	63.40	67.38
Dereham	48.52	52.08	55.33	58.64	62.07
Swaffham	8.29	8.86	9.34	9.83	10.31
Watton	6.95	7.46	7.94	8.42	8.93
Attleborough	16.52	17.81	18.99	20.22	21.54
Other Breckland	32.74	35.14	37.34	39.57	41.91
Total	165.27	177.37	188.59	200.08	212.13
Turnover of existing facilities					
Thetford	52.25	52.56	52.83	53.09	53.36
Dereham	48.52	48.81	49.06	49.30	49.55
Swaffham	8.29	8.34	8.38	8.43	8.47
Watton	6.95	6.99	7.03	7.06	7.10
Attleborough	16.52	16.61	16.70	16.78	16.87
Other Breckland	32.74	32.94	33.10	33.27	33.44
Total	165.27	166.26	167.09	167.93	168.77
Surplus/deficit expenditure					
Thetford	-	3.46	6.81	10.31	14.03
Dereham	-	3.27	6.28	9.33	12.52
Swaffham	-	0.51	0.96	1.40	1.84
Watton	-	0.47	0.91	1.36	1.83
Attleborough	-	1.19	2.30	3.44	4.68
Other Breckland	-	2.20	4.24	6.31	8.47
Total	-	11.11	21.49	32.15	43.36

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 22 Leisure Figure 2

Table 11 - Food and beverage floorspace capacity up to 2046 (cumulative)

	2025	2031	2036	2041	2046
Turnover density new floorspace (£ per sq m)	£6,000	£6,036	£6,066	£6,097	£6,127
Floorspace projection (sq m gross)					
Thetford	0	573	1,123	1,691	2,289
Dereham	0	542	1,035	1,531	2,043
Swaffham	0	85	158	230	300
Watton	0	78	151	223	299
Attleborough	0	198	378	565	763
Other Breckland	0	364	698	1,034	1,383
Total	0	1,840	3,543	5,274	7,077

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 22 Leisure - Figure 2
 Figures may not sum due to rounding

Appendix 5 Leisure/cultural capacity

Table 1 - Study area population projections

Zone	2025	2031	2036	2041	2046
1 - Thetford	60,751	62,976	64,723	66,427	68,095
2 - Dereham	48,282	50,184	51,527	52,777	53,957
3 - Swaffham	19,532	20,164	20,501	20,797	20,977
4 - Watton	22,284	23,112	23,735	24,277	24,800
5 - Attleborough	31,812	33,255	34,282	35,280	36,293
Total	182,661	189,691	194,768	199,558	204,121

Sources: Experian population projections March 2025.

Table 2 - Leisure, entertainment cultural expenditure per person per annum (£)

Zone	2025	2031	2036	2041	2046
1 - Thetford	227	235	243	252	261
2 - Dereham	295	305	316	327	339
3 - Swaffham	277	287	297	307	319
4 - Watton	258	266	276	286	296
5 - Attleborough	292	302	313	324	336

Sources:

Experian Local Expenditure 2023 (2023 prices)

Experian growth rates - Retail Planner Briefing Note 22 (March 2025)

Table 3 - Total leisure, entertainment cultural expenditure (£M)

Zone	2025	2031	2036	2041	2046
1 - Thetford	13.81	14.79	15.74	16.73	17.78
2 - Dereham	14.25	15.31	16.28	17.26	18.29
3 - Swaffham	5.42	5.78	6.09	6.39	6.69
4 - Watton	5.74	6.16	6.55	6.94	7.34
5 - Attleborough	9.30	10.04	10.72	11.43	12.18
Total	48.52	52.09	55.38	58.75	62.28

Source: Tables 1 and 2

Table 4 - Base year 2025 leisure, entertainment cultural market shares by zone (%)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow
Zone 1 - Thetford	37.2%	0.3%	0.0%	3.9%	19.4%	10.0%
Zone 2 - Dereham	0.9%	51.7%	19.8%	22.9%	0.9%	5.0%
Zone 3 - Swaffham	0.0%	0.1%	19.2%	2.4%	0.0%	10.0%
Zone 4 - Watton	4.6%	0.1%	0.2%	38.6%	8.4%	2.0%
Zone 5 - Attleborough	0.2%	0.0%	0.0%	6.6%	20.4%	5.0%
Breckland District Total	42.9%	52.2%	39.2%	74.4%	49.1%	n/a
Brandon / Lakenheath	11.0%	0.0%	0.0%	0.0%	0.2%	n/a
Bury St Edmunds	12.2%	0.2%	0.3%	0.4%	1.5%	n/a
Diss	0.1%	3.9%	0.0%	0.0%	3.0%	n/a
Downham Market	0.8%	0.0%	0.0%	0.0%	0.0%	n/a
Fakenham	0.1%	4.3%	21.2%	0.0%	0.0%	n/a
Kings Lynn	2.4%	1.3%	8.0%	1.9%	2.8%	n/a
Mildenhall	4.5%	0.0%	0.0%	0.0%	0.0%	n/a
Norwich	12.3%	28.8%	14.0%	18.9%	25.1%	n/a
Wymondham	0.0%	3.2%	0.0%	0.0%	4.3%	n/a
Elsewhere	13.6%	6.0%	17.2%	4.3%	14.0%	n/a
TOTAL	100.0%	100.0%	100.0%	100.0%	100.0%	n/a

Source: NEMS Household Survey March 2025 and Lichfields' analysis.

Table 5 - Base year 2025 leisure, entertainment cultural expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2025	£13.81	£14.25	£5.42	£5.74	£9.30		£48.52
Zone 1 - Thetford	£5.14	£0.04	£0.00	£0.23	£1.80	£0.80	£8.01
Zone 2 - Dereham	£0.13	£7.37	£1.08	£1.31	£0.08	£0.52	£10.49
Zone 3 - Swaffham	£0.00	£0.01	£1.04	£0.14	£0.00	£0.13	£1.32
Zone 4 - Watton	£0.63	£0.02	£0.01	£2.22	£0.79	£0.07	£3.74
Zone 5 - Attleborough	£0.03	£0.00	£0.00	£0.38	£1.90	£0.12	£2.43
Breckland District Total	£5.93	£7.44	£2.12	£4.27	£4.56	£1.65	£25.99
Brandon / Lakenheath	£1.52	£0.00	£0.00	£0.00	£0.02	n/a	£1.54
Bury St Edmunds	£1.68	£0.03	£0.02	£0.02	£0.14	n/a	£1.89
Diss	£0.02	£0.56	£0.00	£0.00	£0.28	n/a	£0.86
Downham Market	£0.11	£0.00	£0.00	£0.00	£0.00	n/a	£0.11
Fakenham	£0.01	£0.61	£1.15	£0.00	£0.00	n/a	£1.77
Kings Lynn	£0.34	£0.18	£0.43	£0.11	£0.26	n/a	£1.32
Mildenhall	£0.62	£0.00	£0.00	£0.00	£0.00	n/a	£0.62
Norwich	£1.70	£4.10	£0.76	£1.09	£2.33	n/a	£9.98
Wymondham	£0.00	£0.46	£0.00	£0.00	£0.40	n/a	£0.87
	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Elsewhere	£1.88	£0.86	£0.93	£0.25	£1.30	n/a	£5.23
TOTAL	£13.81	£14.25	£5.42	£5.74	£9.30	n/a	£50.18

Source: Table 3 and Table 4

Table 6 - Future 2031 leisure, entertainment cultural expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2031	£14.79	£15.31	£5.78	£6.16	£10.04		£52.09
Zone 1 - Thetford	£5.50	£0.05	£0.00	£0.24	£1.94	£0.86	£8.60
Zone 2 - Dereham	£0.14	£7.92	£1.15	£1.41	£0.09	£0.56	£11.26
Zone 3 - Swaffham	£0.00	£0.01	£1.11	£0.15	£0.00	£0.14	£1.41
Zone 4 - Watton	£0.68	£0.02	£0.01	£2.38	£0.85	£0.08	£4.01
Zone 5 - Attleborough	£0.03	£0.00	£0.00	£0.41	£2.05	£0.13	£2.62
Breckland District Total	£6.35	£7.99	£2.27	£4.58	£4.93	£1.77	£27.90
Brandon / Lakenheath	£1.63	£0.00	£0.00	£0.00	£0.02	n/a	£1.65
Bury St Edmunds	£1.80	£0.03	£0.02	£0.03	£0.15	n/a	£2.03
Diss	£0.02	£0.60	£0.00	£0.00	£0.30	n/a	£0.93
Downham Market	£0.12	£0.00	£0.00	£0.00	£0.00	n/a	£0.12
Fakenham	£0.01	£0.66	£1.22	£0.00	£0.00	n/a	£1.89
Kings Lynn	£0.36	£0.20	£0.46	£0.12	£0.28	n/a	£1.42
Mildenhall	£0.67	£0.00	£0.00	£0.00	£0.00	n/a	£0.67
Norwich	£1.82	£4.41	£0.81	£1.16	£2.52	n/a	£10.72
Wymondham	£0.00	£0.50	£0.00	£0.00	£0.44	n/a	£0.93
	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Elsewhere	£2.02	£0.93	£1.00	£0.27	£1.41	n/a	£5.61
TOTAL	£14.79	£15.31	£5.78	£6.16	£10.04	n/a	£53.86

Source: Table 3 and Table 4

Table 7 - Future 2036 leisure, entertainment cultural expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2036	£15.74	£16.28	£6.09	£6.55	£10.72		£55.38
Zone 1 - Thetford	£5.86	£0.05	£0.00	£0.26	£2.07	£0.92	£9.15
Zone 2 - Dereham	£0.14	£8.42	£1.21	£1.50	£0.09	£0.60	£11.96
Zone 3 - Swaffham	£0.00	£0.01	£1.17	£0.16	£0.00	£0.15	£1.49
Zone 4 - Watton	£0.72	£0.02	£0.01	£2.53	£0.91	£0.09	£4.27
Zone 5 - Attleborough	£0.04	£0.00	£0.00	£0.43	£2.19	£0.14	£2.80
Breckland District Total	£6.76	£8.50	£2.39	£4.87	£5.26	£1.89	£29.67
Brandon / Lakenheath	£1.73	£0.00	£0.00	£0.00	£0.02	n/a	£1.75
Bury St Edmunds	£1.92	£0.03	£0.02	£0.03	£0.16	n/a	£2.16
Diss	£0.02	£0.64	£0.00	£0.00	£0.32	n/a	£0.99
Downham Market	£0.13	£0.00	£0.00	£0.00	£0.00	n/a	£0.13
Fakenham	£0.01	£0.70	£1.29	£0.00	£0.00	n/a	£2.00
Kings Lynn	£0.38	£0.21	£0.49	£0.13	£0.30	n/a	£1.51
Mildenhall	£0.71	£0.00	£0.00	£0.00	£0.00	n/a	£0.71
Norwich	£1.94	£4.68	£0.85	£1.24	£2.69	n/a	£11.40
Wymondham	£0.00	£0.53	£0.00	£0.00	£0.46	n/a	£0.99
	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Elsewhere	£2.15	£0.98	£1.05	£0.28	£1.50	n/a	£5.96
TOTAL	£15.74	£16.28	£6.09	£6.55	£10.72	n/a	£57.27

Source: Table 3 and Table 4

Table 8 - Future 2041 leisure, entertainment cultural expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2041	£16.73	£17.26	£6.39	£6.94	£11.43		£58.75
Zone 1 - Thetford	£6.22	£0.05	£0.00	£0.27	£2.21	£0.97	£9.73
Zone 2 - Dereham	£0.15	£8.93	£1.27	£1.59	£0.10	£0.63	£12.67
Zone 3 - Swaffham	£0.00	£0.02	£1.23	£0.16	£0.00	£0.16	£1.56
Zone 4 - Watton	£0.77	£0.02	£0.01	£2.68	£0.96	£0.09	£4.53
Zone 5 - Attleborough	£0.04	£0.00	£0.00	£0.46	£2.34	£0.15	£2.98
Breckland District Total	£7.18	£9.01	£2.51	£5.16	£5.61	£2.00	£31.47
Brandon / Lakenheath	£1.84	£0.00	£0.00	£0.00	£0.02	n/a	£1.86
Bury St Edmunds	£2.04	£0.03	£0.02	£0.03	£0.17	n/a	£2.29
Diss	£0.02	£0.68	£0.00	£0.00	£0.34	n/a	£1.05
Downham Market	£0.14	£0.00	£0.00	£0.00	£0.00	n/a	£0.14
Fakenham	£0.01	£0.74	£1.35	£0.00	£0.00	n/a	£2.11
Kings Lynn	£0.41	£0.22	£0.51	£0.13	£0.32	n/a	£1.60
Mildenhall	£0.75	£0.00	£0.00	£0.00	£0.00	n/a	£0.75
Norwich	£2.06	£4.97	£0.90	£1.31	£2.87	n/a	£12.10
Wymondham	£0.00	£0.56	£0.00	£0.00	£0.50	n/a	£1.06
	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Elsewhere	£2.28	£1.04	£1.10	£0.30	£1.60	n/a	£6.33
TOTAL	£16.73	£17.26	£6.39	£6.94	£11.43	n/a	£60.75

Source: Table 3 and Table 4

Table 9 - Future 2046 leisure, entertainment cultural expenditure patterns (£M)

	1 Thetford	2 Dereham	3 Swaffham	4 Watton	5 Attleborough	Inflow	Total
Expenditure 2046	£17.78	£18.29	£6.69	£7.34	£12.18		£62.28
Zone 1 - Thetford	£6.61	£0.05	£0.00	£0.29	£2.36	£1.04	£10.35
Zone 2 - Dereham	£0.16	£9.46	£1.33	£1.68	£0.10	£0.67	£13.40
Zone 3 - Swaffham	£0.00	£0.02	£1.28	£0.17	£0.00	£0.16	£1.64
Zone 4 - Watton	£0.81	£0.02	£0.01	£2.84	£1.03	£0.10	£4.81
Zone 5 - Attleborough	£0.04	£0.00	£0.00	£0.48	£2.49	£0.16	£3.17
Breckland District Total	£7.63	£9.55	£2.62	£5.46	£5.98	£2.12	£33.37
Brandon / Lakenheath	£1.96	£0.00	£0.00	£0.00	£0.02	n/a	£1.98
Bury St Edmunds	£2.16	£0.03	£0.02	£0.03	£0.18	n/a	£2.44
Diss	£0.03	£0.72	£0.00	£0.00	£0.37	n/a	£1.11
Downham Market	£0.15	£0.00	£0.00	£0.00	£0.00	n/a	£0.15
Fakenham	£0.01	£0.79	£1.42	£0.00	£0.00	n/a	£2.22
Kings Lynn	£0.43	£0.24	£0.53	£0.14	£0.34	n/a	£1.69
Mildenhall	£0.80	£0.00	£0.00	£0.00	£0.00	n/a	£0.80
Norwich	£2.19	£5.27	£0.94	£1.39	£3.05	n/a	£12.83
Wymondham	£0.00	£0.59	£0.00	£0.00	£0.53	n/a	£1.12
	£0.00	£0.00	£0.00	£0.00	£0.00	n/a	£0.00
Elsewhere	£2.42	£1.11	£1.15	£0.32	£1.70	n/a	£6.71
TOTAL	£17.78	£18.29	£6.69	£7.34	£12.18	n/a	£64.41

Source: Table 3 and Table 4

Table 10 - Summary of leisure, entertainment cultural expenditure 2025 to 2046 (£m)

	2025	2031	2036	2041	2046
Available expenditure					
Zone 1 - Thetford	8.01	8.60	9.15	9.73	10.35
Zone 2 - Dereham	10.49	11.26	11.96	12.67	13.40
Zone 3 - Swaffham	1.32	1.41	1.49	1.56	1.64
Zone 4 - Watton	3.74	4.01	4.27	4.53	4.81
Zone 5 - Attleborough	2.43	2.62	2.80	2.98	3.17
Total	25.99	27.90	29.67	31.47	33.37
Turnover of existing facilities					
Zone 1 - Thetford	8.01	8.06	8.10	8.14	8.18
Zone 2 - Dereham	10.49	10.55	10.60	10.66	10.71
Zone 3 - Swaffham	1.32	1.33	1.34	1.34	1.35
Zone 4 - Watton	3.74	3.76	3.78	3.80	3.82
Zone 5 - Attleborough	2.43	2.45	2.46	2.47	2.48
Total	25.99	26.14	26.27	26.41	26.54
Surplus/deficit expenditure					
Zone 1 - Thetford	-	0.54	1.06	1.60	2.17
Zone 2 - Dereham	-	0.70	1.35	2.01	2.69
Zone 3 - Swaffham	-	0.08	0.15	0.22	0.29
Zone 4 - Watton	-	0.25	0.49	0.73	0.99
Zone 5 - Attleborough	-	0.18	0.34	0.51	0.69
Total	-	1.76	3.39	5.07	6.84

Source: Tables 5 to 9 and Experian sales density growth rates from Retail Planner Briefing Note 22 Leisure Figure 2

Table 11 - Leisure, entertainment culturalFood and beverage floorspace capacity up to 2046 (cumulative)

	2025	2031	2036	2041	2046
Turnover density new floorspace (£ per sq m)	£2,500	£2,515	£2,528	£2,540	£2,553
Floorspace projection (sq m gross)					
Zone 1 - Thetford	0	215	419	629	852
Zone 2 - Dereham	0	280	534	790	1,054
Zone 3 - Swaffham	0	32	60	87	113
Zone 4 - Watton	0	100	195	289	388
Zone 5 - Attleborough	0	70	135	200	270
Total	0	698	1,342	1,996	2,677

Source: Table 10 and Experian sales density growth rates from Retail Planner Briefing Note 22 Leisure - Figure 2

Figures may not sum due to rounding

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