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Dereham Town Centre Study

Dereham Town Council

December 2017

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1. Introduction

Scope and Purpose

- 1.1 This report has been prepared by GVA for Dereham Town Council ('DTC') to provide a Town Centre Study ('the Study') for Dereham town centre. DTC is preparing a Neighbourhood Development Plan ('NDP') for the town and wishes to gain insights into the future opportunities and challenges facing its town centre to inform policies in its NDP.
- 1.2 Following initial public consultations on the NDP, DTC found that there is considerable enthusiasm for a vision for the town centre as the prominent retail, leisure and cultural centre of the town. DTC therefore requires a Study to provide advice on the implications of the evidence base and emerging strategy within the new Breckland Local Plan and to take into account the complexity of changes in the national arena of UK retailing since 2014. It requires the Study to interpret the contents of the evidence base for the new Breckland Local Plan (including data inputs and assumptions) and reflects on the context of the wider competitive retailing environment.
- 1.3 It is intended that the Study report should offer brief and focused insights on the need (if any) for new land use planning policy to revise and/or supplement the Local Plan policy. In doing so, it should also highlight the opportunities for non-planning actions, to the extent that DTC needs to understand how they may work alongside planning policy to realise the vision.
- 1.4 In order to achieve these aims, this Study has undertaken the following tasks:
- A review of the retailing and town centre evidence base documents informing the new Breckland Local Plan;
 - A review of the health check indicators associated with Dereham town centre¹;
 - We have met with representatives of DTC in order to discuss their views and attitudes towards the strengths and weaknesses of Dereham town centre and the opportunities that future growth in the town may bring for the future role of the town centre;
 - Undertaken our own assessment of the key attributes of the town centre, including potential threats and influences to its future performance and opportunities for the NDP.
- 1.5 GVA is a multi-disciplinary property advisory and agency firm. The authors of this Study are, given the scope of the brief issued by DTC, chartered town planners as the primary scope

¹ In line with the contents of DTC's project brief for this Study, no new empirical research has been undertaken and, instead, we have relied upon existing research undertaken by Breckland District Council, Norfolk County Council and other existing data sources.

relates to the preparation of the Neighbourhood Plan. However, through our work for local planning authorities, developers and retailers across the country we will bring to this Study a wide range of experience and expertise in the management and promotion of town centres.

- 1.6 For the avoidance of doubt, it should be noted that, at the commencement of this project, it had been assumed by GVA and DTC that the latest Breckland District Council evidence base study on retail and town centre issues would be the 2014 Retail Study, undertaken by NLP. However, during the course of completing this Study, an Addendum to the 2014 Retail Study was published. The contents of the 2017 Addendum have been taken into account in the findings and recommendations in this Study.

Contents of this Report

- 1.7 The remainder of this report is structured in the following manner:
- Given that this Study is required to support the preparation of the Dereham NDP, which will sit under the suite of development plan documents at Breckland District, we start with a review of the salient planning policy context for Dereham town centre, including the existing development plan and the progress currently being made to prepare a new Local Plan for Breckland.
 - Section 3 provides a review of key recent economic trends and also the latest forecasts for future change in retail spending patterns. It also provides a review of the recent trends in the retail and leisure sectors, including those affecting town centres.
 - In Section 4 we outline the key issues for Dereham town centre. This takes into account the current characteristics of Dereham town centre, along with an analysis of a range of key issues including forecast retail expenditure capacity levels, potential development sites, along with transport, access, infrastructure, planning policy and non-planning issues.
 - Taking into account the foregoing analysis, Section 5 draws together the key findings of this report to provide a series of conclusions and recommendations for both the Dereham NDP and also DTC's future interaction with the new Breckland Local Plan.
- 1.8 All plans and other documents referred to in the main text of this report can be found in appendices at the rear of this document.

2. Policy Context and District Council Evidence Base

Introduction

- 2.1 Given that this Study is to be used as an evidence base document for the Dereham NDP, we consider it appropriate for a preliminary section of the Study to outline the existing and emerging planning policy context for Dereham. This will include the salient contents of the development plan for the area and the emerging new Breckland Local Plan. This is important as the NPPF notes:

“184. Neighbourhood planning provides a powerful set of tools for local people to ensure that they get the right types of development for their community. The ambition of the neighbourhood should be aligned with the strategic needs and priorities of the wider local area. Neighbourhood plans must be in general conformity with the strategic policies of the Local Plan. To facilitate this, local planning authorities should set out clearly their strategic policies for the area and ensure that an up-to-date Local Plan is in place as quickly as possible. Neighbourhood plans should reflect these policies and neighbourhoods should plan positively to support them. Neighbourhood plans and orders should not promote less development than set out in the Local Plan or undermine its strategic policies.

185. Outside these strategic elements, neighbourhood plans will be able to shape and direct sustainable development in their area. Once a neighbourhood plan has demonstrated its general conformity with the strategic policies of the Local Plan and is brought into force, the policies it contains take precedence over existing non-strategic policies in the Local Plan for that neighbourhood, where they are in conflict. Local planning authorities should avoid duplicating planning processes for non-strategic policies where a neighbourhood plan is in preparation”.

The Adopted Development Plan

- 2.2 The existing development plan for Breckland District comprises a number of documents including the Core Strategy and Development Control Policies ('the Core Strategy') and Site Specific Policies and Proposals ('SSPP') documents. A brief summary of these two documents, insofar as they relate to Dereham, is outlined below.

Core Strategy

- 2.3 The Core Strategy was adopted in 2009 and sets the strategic context for the District. The spatial strategy² indicates that Dereham will experience significant employment growth coupled with focused housing growth of up to 2,000 new homes. The strategy also indicates that Dereham town centre will grow and the service offer will be improved to enhance the settlement's potential for self-containment. In acknowledgement of this aim, food and non-

² Policy SS1

food retail floorspace is projected to expand by approximately 11,000sq m over the plan period.

- 2.4 Policy CP7 outlines BDC's strategic approach to town centres and retail development proposals. It indicates that retail development outside of town centres will be restricted unless it can be demonstrated that: there is a need for the development, that there are no sequentially preferable sites and no negative impact on the vitality and viability of town centres. The policy also indicates that proposals over 2,500sq m gross in Primary Shopping Areas should have to demonstrate a need for the proposal and that it would not have a negative impact upon the vitality and viability of the town centre.
- 2.5 Policy CP7 also outlines the scale of required convenience and comparison goods floorspace in each of the main settlements in the District. Within Policy CP7, Dereham has, by a small margin, the highest level of retail floorspace requirements over the period 2007-2018 with 7,750-8,500sq m of net additional comparison goods floorspace and 2,000-2,500sq m of net additional convenience goods floorspace³.
- 2.6 Policy DC9 outlines the District Council's approach to assessing proposals to retail development in the defined Primary Frontages and proposals for town centre uses in the Secondary Frontage areas. Amongst the various criteria which need to be met are limits on the proportion of non-Class A1 units in Primary Frontages (25%) and non A, B1, C1, D1 and D2 units in Secondary Frontages (50%).

SSPP DPD

- 2.7 The SSPP was adopted in 2012 and provides several separate site allocations for residential, employment and retail uses. Policy D6 is the single retail land use allocation which focuses upon an area of land between Georges Road, Nunn's Way and Cowper Road. The extent of the allocation is shown on the plan at Appendix I to this report. Policy D6 indicates that this area will accommodate a balance of around 4,900sq m net comparison goods floorspace and 1,800sq m net convenience goods floorspace. The policy indicates that prior to the submission of a planning application, a development brief or masterplan for the site shall be produced and agreed with the local planning authority. There is also a requirement for any reorganisation/redevelopment of parking provision to comply with policies in the Core Strategy and other relevant parking strategies for Dereham.

Emerging Planning Policy

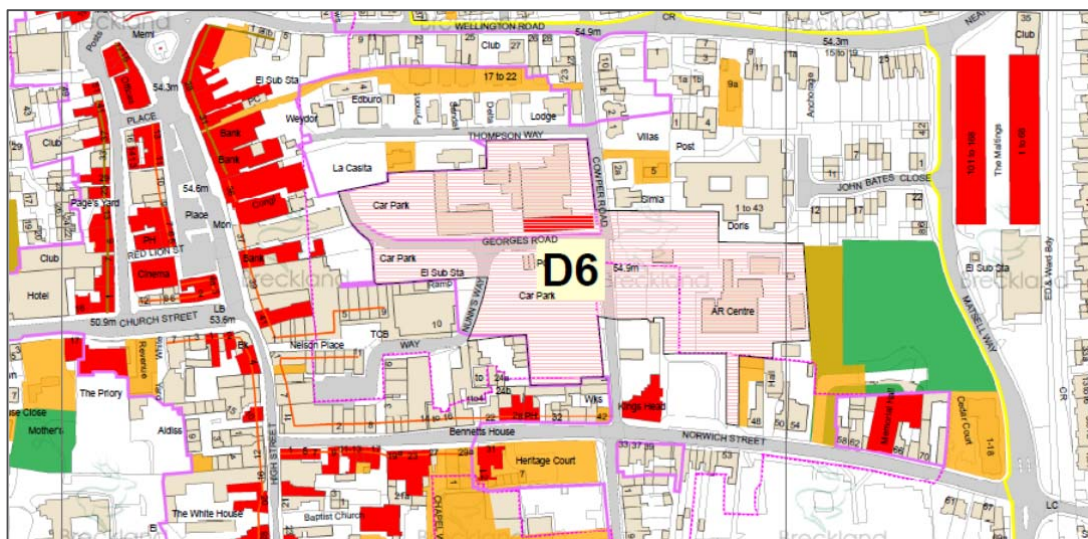
- 2.8 BDC are currently preparing a new Local Plan for the District and, as set out on BDC's website, the new Local Plan "*will replace the Core Strategy and group of documents that make up the current adopted Local Plan*".

³ Floorspace figures are given in net sales area.

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- 2.9 There have been, to date, various stages of preparation of the new Local Plan, including:
- The Preferred Directions consultation in 2015;
 - The Preferred Site Options and Settlement Boundaries consultation in 2017; and
 - The current Pre-Submission Publication version, released for consultation in Summer 2017.
- 2.10 The new Local Plan is of particular importance to DTC as it will set the context for the preparation and content of the Dereham Neighbourhood Plan.
- 2.11 We have concentrated our review on the Summer 2017 Pre-Submission document and have, during the course of preparing this Study, provided separate advice to DTC on the scope of representations to the recent consultation period.
- 2.12 The main (and only) policy dealing with retailing and town centre issues in the pre-submission plan is Policy EC05. It is effectively an update to PD07 in the preferred directions consultation document and provides the following content:
- A forecast floorspace quantitative capacity for convenience, comparison and food/beverage floorspace up to 2036;
 - Confirmation that Thetford, Dereham, Attleborough, Swaffham and Watton are the preferred locations for main town centre uses;
 - Defined impact assessment thresholds for retail , leisure and office proposals outside of the main defined town centres;
 - Indicates that retail floorspace outside of the defined centres will be restricted where it fails the sequential and impact tests;
 - Outlines conditional support for retail floorspace within the new urban extensions in Thetford and Attleborough.
- 2.13 EC05 outlines the 'requirement' for new retail floorspace in Dereham and the other four main town centres in the District and the floorspace capacity forecasts are based upon the findings of a 2017 retail study undertaken by Lichfields (see later in this section). For Dereham, the retail floorspace requirements are as follows:
- Convenience goods floorspace: 1,950sq m net
 - Comparison goods floorspace: 5,220sq m net
 - Food and beverage floorspace: 849sq m gross.

- 2.14 The proposals map for the pre-submission plan includes an allocation, known as D6, shown in Figure 2.1 below. The legend to the proposals map indicates that this is a saved retail allocation and it appears to match the Policy D6 allocation in the SSPP DPD. However, the draft Local Plan text does not appear to make any references to D6 allocation and how the content of the D6 allocation relates to the content of draft Policy EC05.

Figure 2.1: extract from Draft Local Plan Pre-Submission Proposals Map



- 2.15 The pre-submission plan proposals map also includes the various town centre boundaries and frontages and, again, there are no changes to the town centre and primary shopping area boundaries and the primary and secondary frontages.
- 2.16 In a change from the 2015 Preferred Directions consultation document, which allocated 910 new dwellings to Dereham over the Local Plan period, the Pre-Submission Plan allocates 1,612 new dwellings to the town. Taking into account completions, commitments and saved Local Plan allocations, the Pre-Submission plan proposes to allocate an additional 600 new dwellings to the town. This is therefore an increase of circa 700 new dwellings over previous versions of the draft Local Plan.

The Town Centres and Retailing Evidence Base

2014 Retail Study

- 2.17 The main evidence base document on retailing and town centre issues supporting the emerging new Local Plan is the Breckland Retail Study Update 2014 ('the 2014 Retail Study'). The 2014 Retail Study was prepared by NLP who also prepared a Retail and Commercial Leisure Study for BDC in 2010.

2.18 The 2014 Retail Study covers a number of different aspects including: an audit of the main town centres, a new household survey of shopping habits (conducted in July 2014), an assessment of the need to new retail floorspace in the District, requirements for other main town centre uses, along with an assessment of the scope for accommodating growth in the main settlements. Given that the 2017 Retail Study Addendum (see below) updated the quantitative need forecasts for convenience and comparison goods floorspace, we do not need to set out in detail the findings of the 2014 Retail Study in relation to quantitative need, although the other parts of the 2014 study concluded the following in relation to Dereham:

- Part of the projected need for additional retail floorspace could be accommodated in vacant premises in Dereham town centre.
- The short term assessed needs should be accommodated in existing vacant floorspace, Wrights Walk Phase 2 should be considered for meeting the medium term need and the TA Centre / land north of Georges Road considered for meeting the longer term need.
- In relation to the town centre, the study indicated a number of positives including: the size of the shopping centre, the retention of non-food shopping trips, the range of services and mix of national multiple and local independent traders, along with free public car parks. Negative factors included: the lack of a shopping circuit, low proportion of clothing/fashion stores and the lack of large modern premises suitable for national multiple retailers.
- The proportion of vacant units was, at the time of the study, similar to the national average. The proportions of retail and service uses in the centre were generally similar to their respective national averages, although the notable differences were a lower than average proportion of convenience goods retailers.
- An impact assessment threshold of 1,000sq m gross was recommended for Dereham (based upon the level of floorspace capacity).

2017 Retail Study Addendum

2.19 In March 2017, Lichfields (formerly known as NLP) completed an update to the quantitative need forecasts for Class A1 convenience and comparison goods floorspace and Class A3/4/5 food and drink floorspace across Breckland District. The Addendum study was published by BDC during the course of completing this study. The Addendum adopts the following evidence base information:

- Updated base per capita retail expenditure forecasts from Experian (2015 base spending levels)⁴;
- Revised 2014 population projections from the Office of National Statistics ('ONS')⁵;
- Updated economic forecasts from Experian⁶ have been incorporated;
- The same 2014 survey of household shopping patterns, as used within the 2014 study;
- Updated estimates of floorspace of existing stores and the latest company average turnover levels from Mintel.

2.20 One notable change between the 2014 and 2017 studies is the forecast difference in distribution between the distribution in housing growth across Breckland District. Table 2.1 outlines the differences in approach between the two studies:

Table 2.1: comparison between the distribution of housing growth between the 2014 and 2017 Breckland retail study documents

Town	% of Housing Growth	
	2014 Study	2017 Study
Attleborough	95%	25%
Thetford		25%
Dereham	5%	10%
Swaffham		10%
Watton		10%
All other areas		20%

2.21 As can be seen, there has been a significant change in the distribution of housing growth between the two studies, with the proportion of growth attributed to Thetford and Attleborough dropping from 95% to 50% of all growth in the District. The amount of growth attributed to Dereham has risen although the confirmation of the precise amount is not available as the 2014 did not provide specific information on Dereham.

2.22 Based upon the above data and assumptions, Table 2.2 below outlines the difference between the 2014 and 2017 convenience goods floorspace capacity forecasts for Dereham.

⁴ The 2014 NLP adopted XXXX base spending levels

⁵ The 2014 study was based upon the 2012 ONS projections.

⁶ Experian's Retail Planner Briefing Note 14 (November 2016)

For the avoidance of doubt, these are cumulative forecasts and are based upon net sales area.

Table 2.2: difference between convenience goods floorspace capacity forecasts in 2014 and 2017 retail study documents.

	By 2021	By 2026	By 2031	By 2036
2014 Retail Study	922sq m net	1,345sq m net	1,778sq m net	2,284sq m net
2017 Retail Study	360sq m net	868sq m net	1,379sq m net	1,950sq m net

Notes: taken from Table 14 (Appendix 2) of 2014 retail study and Table 14 (Appendix 2) of 2017 retail study. Both based upon amended market share for Dereham.

2.23 As can be seen from Table 2.2 above, the amount of capacity for additional convenience goods floorspace in Dereham has reduced between the 2014 and 2017 assessments. There are a number of contrasting factors which have influenced this change:

- More pessimistic forecasts for future levels of convenience goods spending (see Section 3 for further details);
- A higher level of forecast benchmark turnover for existing convenience goods floorspace in Dereham⁷; and
- A higher level of growth in residential population in Dereham, due to the changes made by Lichfields and BDC in relation to the distribution of housing growth in the draft Local Plan.

2.24 The result of the above is that the initial levels of convenience goods floorspace capacity (at 2021) in Dereham are lower in the 2017 retail study (by around two-thirds) but the growth is much higher. In the 2017 study the amount of surplus floorspace capacity grows by circa 5.5 as opposed to circa 2.5 growth in the 2014. This is due to the materially higher levels of population growth being assigned to Dereham.

2.25 However, a closer inspection of the convenience goods floorspace analysis reveals that there may have been an error. Given that the household survey underpinning the analysis was undertaken in 2014 there is a need to account of any more recent store openings since that time. In the case of Dereham a new ALDI store has opened (in late 2016) and the turnover of this store should have been included in the calculation of benchmark turnover in the same

⁷ Benchmark turnover levels are commonly calculated using grocery retailers' national average performance levels. In the case of stores in Dereham, a number of retailers, including Lidl and Co-op have experienced a growing company average sales performance between 2014 and 2017 which has led to a high forecast benchmark turnover level for the town. This has the potential to reduce the amount of surplus expenditure capacity as existing floorspace is able to absorb a greater amount of spending.

way that planning permissions for new stores in Attleborough and Thetford have been included in the analysis⁸.

- 2.26 As a consequence, it would appear that the retail expenditure and floorspace capacity forecasts in Table 14 (Appendix 2) of the 2017 retail study may well be over-estimates. This issue is re-visited in Section 4 of this Study where we seek to revise the capacity forecasts in order to take into account the new ALDI store.
- 2.27 Table 2.3 outlines the changes in comparison goods floorspace capacity predictions between the 2014 and 2017 retail studies.

Table 2.3: difference between comparison goods floorspace capacity forecasts in 2014 and 2017 retail study documents.

	By 2021	By 2026	By 2031	By 2036
2014 Retail Study	370sq m net	1,283sq m net	2,248sq m net	3,275sq m net
2017 Retail Study	272sq m net	1,756sq m net	3,450sq m net	5,220sq m net

Notes: taken from Table 14 (Appendix 3) of 2014 retail study and Table 14 (Appendix 3) of 2017 retail study.

- 2.28 Table 2.3 shows that, in a similar manner to the convenience goods floorspace assessment, the assignment of a materially higher level of population growth to Dereham leads to a materially higher level of quantitative capacity for comparison goods floorspace. The increases are circa 500sq m at 2026, 1,200sq m at 2031 and circa 2,000sq m at 2036.
- 2.29 However, given the forecasting period involved in the 2014 and 2017 retail studies, we would urge caution when consideration is given to the medium to longer term forecasts – i.e. those after 2026. Forecasts across this period become increasingly unreliable as unforeseen economic, political and world events have the potential to affect the UK and world economy. This leads to the question of whether the Local Plan should be trying to plan in detail for these medium to longer term quantitative forecasts and this issue is discussed in more detail in Section 4 of this report.
- 2.30 The lower initial capacity level at 2017 is caused by the continued assumption that demand equals supply in relation to food and beverage floorspace at the start of the assessment period – i.e. 2017. In other words, it has been assumed that any change in expenditure levels between the 2014 and 2017 retail studies, including any surplus capacity predicted by the 2014 study for the period 2014-2017 will have been matched by changes in actual floorspace in Dereham.

⁸ See Table 13, Appendix 2 of the 2017 retail study

- 2.31 Finally, the 2017 retail study also provides an updated set of forecasts for food and beverage floorspace

Table 2.4: difference between food and beverage floorspace capacity forecasts in 2014 and 2017 retail study documents.

	By 2021	By 2026	By 2031	By 2036
2014 Retail Study	154sq m	268sq m	381sq m	496sq m
2017 Retail Study	120sq m net	352sq m net	602sq m net	849sq m net

Notes: taken from Table 14 (Appendix 2) of 2014 retail study and Table 14 (Appendix 2) of 2017 retail study. Both based upon amended market share for Dereham.

- 2.32 Once again there is a materially higher level of growth in potential additional floorspace capacity, influenced by the higher level of population growth assigned to Dereham over the period up to 2036. Like the comparison goods assessment, an equilibrium approach has been adopted for the start of the latest (2017) assessment and it will have been assumed that any changes in spending/capacity between 2014 and 2017 will have been matched by actual changes in floorspace over this period.
- 2.33 The 2017 retail study does not re-visit the 2014 analysis of how to accommodate the identified need, nor does it provide an updated assessment of qualitative needs.

Conclusion

- 2.34 Our summary of the planning policy position surrounding Dereham town centre indicates that the New Breckland Local Plan intends to continue with the policy of the existing development plan and identify land to the east of the core retail area for additional retail development although, at the present time, there is a lack of clarity in the text of the draft Local Plan over the strategy for this area. Therefore, DTC needs to work with BDC in order to improve the content of the strategy for Dereham town centre in the Local Plan and also supplement this with additional information in the Neighbourhood Plan. In addition, whilst the recent update to the retail floorspace capacity should be welcomed, there is a potential error in the convenience goods capacity assessment which needs to be rectified.

3. Recent, Current and Future Trends Affecting Town Centres

Introduction

- 3.1 During the preparation of the brief for this study, and following commencement prior to the inception meeting with DTC, it had been assumed that BDC would not be commissioning an update to the 2014 retail study. As set out in Section 2 of this report, an Addendum to the 2014 retail study, dated March 2017, has now been published and which provides an updated quantitative assessment of convenience, comparison and food/beverage floorspace capacity over the period to 2036.
- 3.2 As a consequence, there is no need for this study to provide an update to the 2014 quantitative need forecasts, although we consider it useful to provide an overview of the changes in economic forecasts between the 2014 and 2017 retail studies, particularly as these changes are not spelt out in detail in the 2017 retail study.
- 3.3 We also provide below a commentary of how recent events, including the recent EU referendum result, has affected economic growth prospects.

General economic conditions

- 3.4 In terms of the general UK economy, the recovery has continued into 2016. However, there has been some moderation in the pace of the upswing since 2014, when GDP growth peaked at 2.9%, to close to 2% in 2015 and 2016. The recovery has become increasingly reliant on consumer spending as investment growth has slowed. Meanwhile, fiscal restraint and weak exports remain major constraints. The near term outlook has become more uncertain following the UK referendum vote in June 2016 in favour of leaving the EU. While the economy has thus far proved resilient, the vote has created major uncertainties, which are expected to take a toll on business sentiment, investment and hiring plans over the coming year.
- 3.5 Alongside this, the recent decline in sterling will stoke inflationary pressures. The combination of higher inflation and slower employment growth will take a toll on consumer incomes and spending over the next couple of years. The UK economy's heavy dependency on consumer spending as the primary engine of expansion means that GDP growth is set to slow sharply to the 1-1.5% range over 2017 and 2018.
- 3.6 The outlook for the next two years for the UK economy has weakened significantly following the Brexit vote. Uncertainties, notably on the domestic front, have mounted. Inflation threatens to erode real income growth and curb consumer spending while capital spending will suffer. There is likely to be some gains from the more competitive exchange rate, but with global

demand remaining weak we expect this to be heavily outweighed by the fall in domestic demand, despite looser monetary and fiscal stances. Consumer spending and retail sales volumes will decelerate sharply from strong pace of 2016 as real household incomes are squeezed by rising inflation and a slowdown in job creation.

- 3.7 In the medium term, the repercussions of the recession and the implications of the EU referendum vote are set to hamper economic progress for a few years. Much will depend on the outcome of trade negotiations and terminating involvement with the EU. These negotiations could take several years to conclude and, in the meantime, uncertainty over the final deal is expected to constrain business confidence and investment plans. The baseline forecasts outlined later in this section assume that a deal will eventually be struck that includes some form of access to the single market. From 2020 onwards, investment is projected to rebound as the uncertainty clears, resulting in a bounce-back period where GDP is propelled back above the 2% mark. For the 2019-23 period overall, GDP growth is expected to average 2.3% per annum, against 2.6% from 1981 to 2008. Alongside this, consumer spending growth is forecast to average 2.1%, with retail sales growth averaging 2.6%.
- 3.8 The EU referendum vote has also created major uncertainties regarding the long term outlook for the UK economy. Its performance over period 2024-35 will, in Experian's opinion, depend on the terms of new economic relationship between the EU and UK. The baseline forecasts from Experian assume that by this point, negotiations with the EU will have been concluded and the UK will continue to have access to the single market under the new arrangement. However, it is unlikely that the new terms will be as favourable as full EU membership, which is reflected by a small downgrade in Experian's long term projections for trade, investment and GDP. For the period 2024-35, GDP growth is projected to average 2%, which is below the historic long-term trend growth of 2.3%.
- 3.9 The expansion in comparison goods volumes, averaging 3.2% per head to 2035, will be less buoyant than in the three decades to 2015 as key factors that boosted growth, notably the globalisation that subdued audio-visual goods prices significantly, will not be repeated to the same degree.
- 3.10 Convenience goods recorded a marginal decline in the decade leading up to the 2008 recession. Volumes were severely hit during the recession and its aftermath. The recovery in retail spending in recent years has been accompanied by only a modest improvement in convenience volumes, which declined by around 1% on an annual average basis during 2012-15. However, the contraction was almost halted in 2016, which is the best performance in just over a decade and well above the long term trend over the whole period 1997 to 2015 averaging -1.2% per head a year. Experian's central forecast has a renewed squeeze in

convenience goods in the short term, before sales per head growth settles at 0.1% a year from 2019 to 2035.

- 3.11 Table 3.1 below outlines the levels of annual change in convenience and comparison goods expenditure which were used to forecast quantitative capacity levels. These forecasts were taken from the Retail Planner Briefing Note 12.1, published by Experian in October 2014. Alongside these figures we provide the latest available retail expenditure forecasts, provided by Experian in their Retail Planner Briefing Note 14, published in November 2016.

Table 3.1: 2014 and 2016 retail expenditure forecasts between 2014-2027 for convenience and comparison goods spending

Year	Convenience		Comparison	
	2014 forecasts	2016 forecasts	2014 forecasts	2016 forecasts
2014	-0.5%	-1.7%	+5.6%	+7.2%
2015	+0.5%	-1.1%	+3.5%	+4.6%
2016	+0.5%	-0.1%	+3.5%	+3.3%
2017	+0.5%	-0.1%	+3.5%	+1.5%
2018	+0.6%	-0.9%	+3.1%	+0.9%
2019	+0.6%	-0.1%	+3.1%	+2.1%
2020	+0.6%	0.0%	+3.1%	+2.9%
2021	+0.6%	+0.2%	+3.1%	+3.3%
2022	+0.6%	-0.1%	+3.1%	+3.4%
2023	+0.7%	-0.1%	+3.3%	+3.4%
2024	+0.7%	0.0%	+3.3%	+3.3%
2025	+0.7%	0.0%	+3.3%	+3.1%
2026	+0.7%	0.0%	+3.3%	+3.1%
2027	+0.7%	+0.1%	+3.3%	+3.1%
Total	+7.5%	-3.9%	+48.1%	+45.3%

- 3.12 Table 3.1 above indicates that there have been some movement in the level of forecast change in spending on convenience and comparison goods over the period 2014-2027. Convenience good spending has changed from a small increase (+7.5%) over the period 2014-2027 to a small decrease (-3.9%). This will have a small effect upon future levels of quantitative capacity, however the following points are relevant:

- There is still likely to be growth in convenience goods expenditure capacity, driven by the growth in the resident population which, as set out in Section 2 of this report and the 2017 retail study, are now forecast to be higher in Dereham.
- The assessment of need is not just about an assessment of quantitative expenditure capacity. Consideration also needs to be given to qualitative factors and consideration should therefore be given to the level of choice and competition within a particular location.

-
- 3.13 There has also been a small decrease in the aggregate level of forecast increase in comparison goods spending levels, from circa +48% previously to +45% now. However, the change is relatively small and is likely to be more than cancelled out by the higher level of population growth assigned to Dereham in the 2017 retail study.

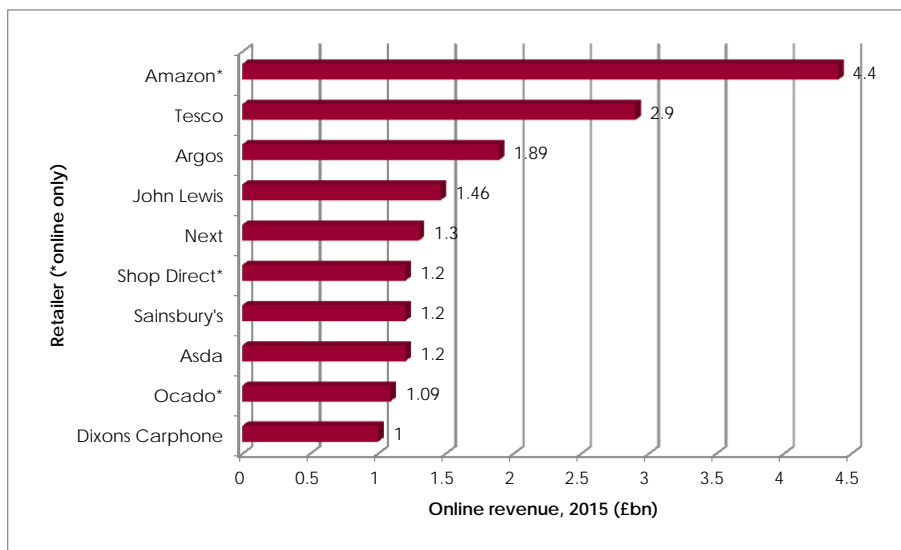
Wider Retailing and Town Centre Trends

Online shopping and 'Click & Collect'

- 3.14 The online shopping population is reaching saturation, and any future growth in the market is likely to come from increased spend driven by new technology, a better 'browsing' experience and improved delivery options. The growth in online sales has previously raised concerns about the continued need for bricks and mortar stores; however trends indicate that online and in-store shopping channels are becoming increasingly blurred and there continues to be an important role for the 'high street' to play.
- 3.15 The 'Click and Collect' market is the largest on-line growth sector in the UK at the current time. Recent data from industry monitor Verdict suggests that click & collect expenditure is expected to grow by 64% between 2016 and 2021, compared to an online growth of 38% over the same period. Verdict's research forecasts that click & collect will grow across all categories, but will particularly be driven by the clothing and footwear sector. The proportion of online orders completed by click & collect has increased from 8.8% in 2011 to 22.5% in 2015, demonstrating steadily-increasing year-on-year growth.
- 3.16 The popularity of click & collect is an important opportunity for town centres, as it can act as a footfall generator in its own right. Verdict identify that 39% of consumers make an additional purchase when collecting an item from a store, up from 29% in 2013. The average amount spent on additional in-store purchases is £13. The majority of national retailers now operate click & collect services.
- 3.17 Despite being a relatively new concept for the retail sector to embrace, click & collect is affirming that physical stores can continue to have a role in the multichannel shopping environment. However the independent retail sector has generally been slower to embrace the click & collect model and this represents an important opportunity in locations where the independent retail sector is an important contributor to the overall vitality and viability of centres.
- 3.18 The click & collect model is not solely benefiting town centres — for example Morrisons is trialling Amazon Lockers in a number of its stores, whilst companies such as Doodle are opening collection/return points within or close to mainline railway stations, acting as click & collect 'hubs' where customers can get orders from a wide variety of retailers sent to and return unwanted goods from.

3.19 For town centres to benefit as the 'preferred locations' for click & collect services they need to have a strong, complementary offer, to give people multiple reasons to visit. Increasingly, local shops and newsagents are also offering 'Click & Collect' facilities, using networks such as CollectPlus, which partners with brands such as ASOS, John Lewis and House of Fraser to deliver online orders to a network of 6,000 local shops across the country, and convenience stores operated by Nisa, Spar and Costcutter.

Figure 3.1: Top ten UK retailers by online revenue, 2015



Source: Retail Week/Prospect, January 2016. *denotes online only stores. Note: John Lewis also have Click & Collect facilities available via Waitrose stores

Changing retailer space requirements

3.20 During the last recession retailers' margins were squeezed, whilst other costs have continued to rise and a raft of multiple and independent retailers have either collapsed or significantly shrunk their store portfolios in recent years. The growth of online shopping means that retailers no longer need stores in every town to achieve national coverage, and many are therefore focusing their development programmes on the provision of large flagship stores in strategic locations, supported by smaller satellite stores and transactional websites.

3.21 The larger flagships accommodate full product ranges whilst smaller stores offer more select ranges, supplemented by internet kiosks allowing access to the full range. This offers many advantages to retailers including lower property costs, more efficient logistics and being able to open stores where there is a high level of demand despite there being space restrictions. This 'polarisation' of retailing is enabling larger dominant centres to continue to attract key flagship formats. For example, Norwich city centre is ranked within the top 15 shopping destinations in the country and therefore has been a beneficiary of this change in shopping patterns. The city centre has a strong range of national operators, many of which operate

from large, regional flagship stores — examples including Marks & Spencer, John Lewis, Zara, H&M and so on.

- 3.22 This 'polarisation' towards larger centres can in turn pose a challenge to smaller and medium-sized centres, where there are higher order centres in close proximity. Many operators — particularly in the clothing/fashion sector — are continuing to close stores in less-profitable, smaller locations as leases expire. The consequence which often arises is that smaller and medium-sized centres become home to more, value-orientated retailers – Poundland, Wilko, Home Bargains, Sports Direct and so on – who are more reluctant to pay the rental costs associated with higher-order centres, and, much in the same way that Woolworths previously did, are developing a comprehensive network of coverage in smaller towns, often by being able to acquire prime retail sites at relatively competitive rates.
- 3.23 The exception to the above trend is smaller centres which have an existing upmarket / specialist retail offer which was less affected by the economic downturn, and therefore fewer opportunities for value retailers to take space have materialised. These centres have a curated, specialist retail and leisure mix often centred on an upmarket clothing, homewares, and casual dining offer. Typically these centres also offer a strong historical setting and environmental quality which increases their attractiveness as 'destinations' (a point we discuss further below).

The role of the town centre

- 3.24 The town centre has been the main shopping channel for centuries, but in the face of new forms of e-tailing (i.e. online shopping) and m-tailing (shopping through mobile phones, tablets and so on) competition many centres will need to continue to adapt in order to remain viable shopping destinations. Across the UK, footfall decreased in High Street locations during the first quarter of 2016, emphasising the need for centres to offer a broad a range of uses as possible to assist in driving footfall. Many centres are increasingly positioning themselves as being locations for leisure and social activities as well as traditional retailing, with more bars, restaurants, food outlets and community spaces.
- 3.25 As noted above, centres which offer unique/specialist retail offer which cannot be matched online are also likely to continue to perform strongly. Enhancing the non-retail offer so town centres (and smaller centres) function as more than just retail locations will help drive footfall and increase dwell time. It is increasingly important for centres to promote unique attractions such as heritage assets, historic buildings and cultural features which can differentiate a centre and improve its attractiveness.
- 3.26 To ensure that town centres have a viable function moving forwards they must provide an attractive shopping and leisure experience which the internet is unable to match. A wider

strategy must deliver a mix of town centre uses to enhance the attraction of a centre, and increase frequency of visit and dwell time. A vital component of this will be making town centres as accessible as possible, with easy and frequent public transport access, appropriate levels of car parking provision, as well as investment in public realm and place marketing initiatives.

The convenience sector

3.27 One of the biggest changes which has taken place in recent years is a fundamental change in food shopping patterns. Industry data providers Mintel have recently described the changes in convenience goods shopping as ‘the trends of the whole of the post-war era [being] reversed’, identifying the following key trends in convenience goods shopping:

- Superstores are losing market share;
- The convenience [small -format] stores of the market leaders and the Co-op are gaining share;
- Aldi and Lidl are achieving double-digit growth;
- Other convenience stores are losing share;
- Certain retailers classified as non-food retailers, notably M&S and the non-food discounters such as Home Bargains and Poundland and increasing their share of food spending; and
- Online demand is growing.

3.28 Mintel consider there to be two reasons behind these trends, which they consider started in 2012. Firstly, ‘There has been a shift of population back into inner cities and much of it into rented accommodation. These people are much more likely to shop on an ‘as needs’ basis and to eat out. So the majority of their food retail demand goes to convenience stores. This is also apparent in the growth of craft bakers and the development of specialist delis’. Secondly, Mintel note that ‘Aldi and Lidl have transformed their offer, expanding their ranges, strengthening their fresh foods and adding premium lines. We think this has led to a step change in their performance and that we are approaching a time when growth will be primarily driven by store openings’.

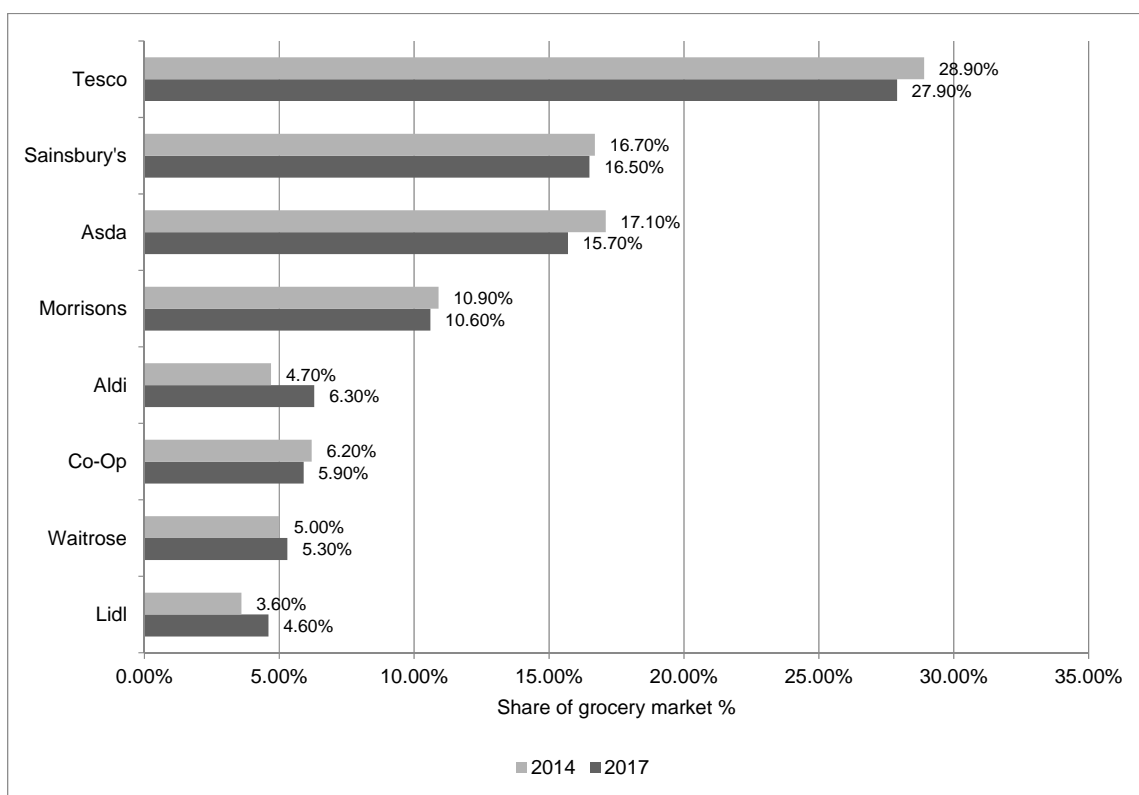
3.29 The increased popularity of ‘as needs’ shopping is behind the growth of small-format ‘convenience’ stores such as Sainsbury’s Local, Tesco Express, Co-Operative, Marks & Spencer Simply Food and Little Waitrose, with this trend particularly apparent in urban areas.

3.30 The main foodstores (i.e. the ‘big four’ – Asda, Morrisons, Sainsbury’s and Tesco) have responded to these changes by reining in substantial expansion of their estates, particularly in terms of larger-format superstores. Reflecting the rapid changes which have taken place in

the convenience goods sector, both Tesco and Morrisons announced a closure programme of underperforming stores in 2015, and further store closures were announced by Morrisons in 2016. In early 2017, Waitrose and M&S also revealed plans to close a small number of stores.

3.31 Both Aldi and Lidl have gained market share for a number of consecutive years, largely at the expense of the ‘big four’, and both Aldi and Lidl are pursuing ambitious development programmes of opening new stores as well as refurbishing older stores. However, as quoted above, Mintel consider that aside from growth from new store openings, these operators’ growth may now begin to plateau. The market share of Aldi and Lidl combined is now over 10% of the total grocery market — but as can be seen from Figure 3.2 neither operator is yet challenging the dominance of the ‘big four’ retailers of Tesco, Sainsbury’s, Asda and Morrisons

Figure 3.2: Market share of main foodstore operators, 2014 and 2017

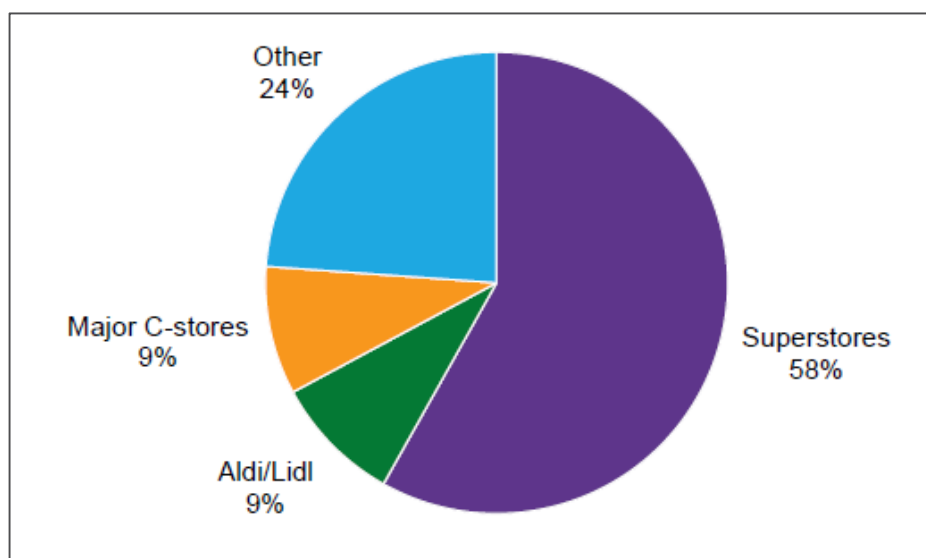


Source: Kantar Worldpanel, March 2017

3.32 However, notwithstanding the trends discussed above, over 50% of food shopping is still undertaken in larger-format supermarkets — and if shopping in Aldi and Lidl stores is included this figure rises to over two-thirds of all food shopping (see Figure 3.3). There is still therefore clearly a role for the larger-format store to play in convenience goods shopping, but generally speaking operators are now opening smaller format stores.

- 3.33 Operators with 'hyper-market' format stores (over 60,000 sq.ft net) are seeking to introduce concessions or sub-lets to make better use of excess space. For example, Sainsbury's are rolling out in-store Argos and Habitat concessions within their larger stores following their acquisition of these brands in 2016. Some large branches of Tesco Extra include either concessions from other Tesco-owned brands, or other fashion retailers.
- 3.34 There remains appetite from foodstore operators to open new stores where suitable opportunities arise, although as we have set out above the size of foodstores being committed to is generally smaller than has previously been the case. We expect the 'big four' retailers to be significantly more selective in committing to new sites, and to instead focus on programmes of enhancements and upgrades to their existing store network where this is considered to be needed.

Figure 3.3: Convenience goods market share by store format, 2016



Source: Mintel UK Retail Rankings, April 2016

Commercial Leisure

- 3.35 As the nature of retail and high-street shopping continues to change over time, the commercial leisure sector is becoming an increasingly important contributor to the vitality and viability of town centres. Leisure time is a precious commodity to consumers and in order to maximise free time, research suggests that town centre visitors often combine leisure activities as part of an overall going out experience.
- 3.36 Reflecting this trend, leisure is becoming an increasingly important component in town centre regeneration schemes, particularly in secondary towns which, reflecting the wider trends in the retail sector previously identified, are in some cases becoming less attractive as retail destinations. Cafes and restaurants in particular are playing an increasing role in enhancing

the vibrancy of centres as they help increase dwell time and attract visitors to a centre who may not want to shop, but still want to visit a centre and socialise.

- 3.37 There is extensive evidence that demonstrates the importance which café culture can make to wider vitality and viability of town centres. Beyond Retail's 'Redefining the Shape and Purpose of Town Centres' (November 2013) concluded that 'town centres need to develop alternative functions to draw people back and support its retail base. Town centres will remain important as a focus for social and commercial purposes however must seek to provide more than a neighbourhood shopping role. Expanding their other roles will be an important response to the polarisation of shopping and in creating a vibrant, social, commercial and cultural hub'. The report goes on to identify 'the need to improve the leisure and food and beverage offer , and to develop the evening economy through restaurants and in-town cinemas'
- 3.38 The contribution which commercial leisure can make to town centres is also identified in the GLA's 'Accommodating Growth in Town Centres' study (2013). The report states that 'most commentators predict that commercial leisure, such as cafes, bars, restaurants and cinemas, will constitute a growing share of town centre floorspace. This is partly a replacement activity for reduced demand for space for traditional retail, and partly driven by the shift in demand to leisure expenditure as discretionary household expenditure rises.' A shift towards a broader mix in centres 'can have wider positive implications on the performance of the town centres in question: residents and visitors spend longer in the centre, undertake 'linked trips' between retail, leisure and other uses, and increase their dwell-time in a centre. The development of a strong commercial leisure offer can also help to increase footfall outside of retail hours, for example in early evenings'. Whilst this report was a London-focussed study, the conclusions can readily be applied to the national context.
- 3.39 The pub industry suffered during the recession with a record number of pub closures across the UK as a direct consequence of a decline in both drinks sales and rental revenues. This decline continues today, at a rate of approximately 30 pub closures per week across the country. Many pubs have in recent years been converted to small-format convenience stores. Additional factors such as competition from supermarkets, changes to licensing legislation and the smoking ban have further compounded the problems faced by many operators. Similar to the foodstores, however, value led brands such as JD Wetherspoon have achieved sales growth in recent years and continue to expand. The popularity of specialist pubs offering craft beers and local ales also continues to grow.
- 3.40 The health and fitness sector continues to perform strongly as the social trend involving the maintenance of personal health and fitness shows no sign of abating. The health and fitness market is currently being expanded through investment by value and budget operators such

as Easy Gym, Gymbox and Pure Gym. This new breed of venues aims to appeal to a wider market with flexible, low cost monthly or 'pay as you go' subscriptions. These facilities are usually located in high-footfall, in or edge of centre locations, often as part of a wider leisure offer.

- 3.41 The cinema market is also continuing to perform strongly, and in recent years has often overtaken foodstores as a typical 'anchor' to new town centre development schemes. As of June 2016, there are 316 cinema multiplexes operational in the UK. Both major cinema operators (e.g. Cineworld, Odeon) and smaller/independent operators (e.g. Curzon, Everyman) continue to open new developments — and importantly, cinema operators are willing to consider openings in smaller town centres, particularly when a development can also incorporate or benefit from close proximity to complementary leisure facilities, particularly restaurants and coffee shops, enabling them to act as leisure 'destinations' in their own right. This trend is salient for Dereham given the existing cinema in the town centre which is a draw to centre during the day and particularly in the evening.

Out-of-Centre Retailing

- 3.42 Retailers are opting to develop stores in the most strategic and cost effective locations, with a notable resurgence of out-of-centre destinations, which offer the benefits of lower rents, larger retail units and in most cases, free car parking. According to Verdict, out-of-town retailing is the only form of retailing which has seen store numbers increase consistently since 2000. The Department for Business, Innovation and Skills (BIS) reports that the number of out-of-centre stores has increased by up to c.1,800 (25%) since 2000.
- 3.43 The recovery of market confidence which has taken place since 2013 is benefitting out-of-town retailing. Vacancy rates have fallen, footfall has increased, and many retailers are seeking expansion in out-of-centre locations. Owners of out-of-centre retail parks are investing in their portfolios to improve their attractiveness as a 'destination', introducing dining offers, a broader tenant mix, free wi-fi and so on. An example of this is the recently-published plans for the extension of Sweet Briar Retail Park in Norwich, which in 2016 became the first out-of-centre location in the country for Ikea's trial of smaller-format click & collect-based stores.
- 3.44 A number of traditional town centre retailers which have developed out-of-town store formats, including John Lewis, which now operates a number of 'At Home' stores, and Next, which has in recent years opened a regional flagship 'Next Home & Garden' store at Longwater, on the western edge of Norwich. Other traditionally 'high street'-focussed retailers such as Debenhams, Primark and H&M also actively trade in out-of-centre locations, albeit to a more limited extent.

Conclusions

- 3.45 This section has outlined some of the key trends and influences for town centres and the retail sector. A key message from this analysis for town centres such as Dereham is the need for uniqueness and developing a specialist role within the wider shopping catchment. With larger centres such as Norwich likely to attract mid to higher order retailers, the future role for towns like Dereham is to develop a role which is both popular with the local population and can provide a specialism which insulates the town against the on-going effects of internet shopping. In addition, there is also an opportunity for centres such as Dereham to reinforce their market penetration by widening their offer and attracting more leisure and food/beverage operators which can help to increase footfall and dwell-time.

4. Key Issues

Introduction

4.1 In order to meet the objectives of DTC's brief for this Study, there is a need, following the context set by Sections 2 and 3, for a thorough review of the key issues affecting Dereham town centre. There is a need to paint a picture of the current state and performance of the town centre and consider a number of key issues in detail. These are:

- The level of retail need;
- Development opportunities;
- Transport and access;
- External threats and influences;
- Marketing, initiatives and non-planning actions;
- Infrastructure; and
- Planning policy.

4.2 Each of these factors/issues are discussed in turn below.

A Picture of Dereham Town Centre

4.3 The extent of Dereham town centre can be best defined by the various frontages and boundaries in the adopted Proposals Map of the development plan. The overall town centre boundary extends from the Cherry Tree surface level car park in the north to the junction between High Street and London Road and the Morrisons supermarket in the south. The western boundary includes the church and St Withburga Lane. The eastern boundary of the town centre runs close to the railway line. The defined Primary Shopping Area is more tightly drawn and encompasses Market Place, Norwich Street, High Street, Wellington Road, Wrights Walk and Church Street. The primary retail frontages are Market Place, High Street, Wrights Walk and Norwich Street.

4.4 In relation to the land use profile of the town centre, we have been provided with data from Norfolk County Council which is as follows:

	2013		2015		2017	
	No.	%	No.	%	No.	%
Convenience Retailers	12	4.9%	12	5.3%	7	3.0%
Comparison Retailers	74	30.3%	62	27.3%	74	31.5%
Leisure Services	49	20.1%	45	19.8%	48	20.4%
Retail Services	45	18.4%	37	16.3%	33	14.0%
Financial & Business Services	31	12.7%	24	10.6%	35	14.9%
Local Public Services/Facilities	13	5.3%	25	11.0%	24	10.2%
Vacant Units	20	8.2%	22	9.7%	14	6.0%
Mixed Use		0.0%		0.0%	3	1.3%
Total	244	100.0%	227	100.0%	235	100.0%

- 4.5 The above land use data shows that between 2015 and 2017 there was a noticeable drop in the number of convenience goods retailers in the centre and now only 3% of all surveyed units are within this type of use. Comparison goods retailers remain the largest sector, occupying around one third (31.5%) of all surveyed units. The number of comparison goods retailers in the centre increased between 2015 and 2017 and now stands at the same level as in 2013.
- 4.6 The NCC data indicates that retail service uses are falling in number and are being replaced by local public services. Vacancies within the town centre remained reasonably static between 2013 and 2015 (at circa 8-10% of all surveyed uses) but there was a noticeable drop between 2015 and 2017 suggesting that the town centre is becoming a more population location for businesses.
- 4.7 The household survey commissioned for the 2014 Retail Study Update provides the most recent detailed set of shopping patterns information for the Dereham area⁹. It provides the following picture of local shopping patterns in relation to Dereham:
- Dereham lies within Zone 2 of the study area for the 2014 Retail Study Update and 2017 Retail Study Addendum – see plan at Appendix IV.
 - 81.4% of all food shopping expenditure from Zone 2 remains within Dereham, with 64% being diverted to the large Tesco and Morrisons supermarkets. The remainder of ‘leaked’ expenditure is generally being spent in Norwich.
 - Just under half (46.8%) of all comparison goods shopping expenditure from Zone 2 residents is retained by stores in Dereham. The 2014 and 2017 retail study documents do not provide a break-down between in-centre and out-of-centre shopping, but the retention of around half of expenditure is the best of all the settlements within Breckland. As would be expected, the majority of leakage of expenditure is directed towards Norwich.

⁹ A more recent survey was commissioned to support the Greater Norwich Retail Study but this survey does not give a detailed picture of shopping patterns focused upon Dereham and the other Breckland settlements.

4.8 In terms of transportation, the town centre has a number of car parks which are located at Swaffham Hill, Guildhall, Cowper Road East, Cowper Road West, Cherry Hill, Morrisons, Wrights Walk. Apart from Morrisons and Wrights Walk, these are owned and operated by BDC. Cherry Tree and Cowper Road are the two largest facilities closest to the town centre and are generally the first choice for town centre shoppers. For public transport, there are bus stops located around the town centre, although the main location for a number of services is along High Street within Market Place. Services which visit the town centre include regular services to Norwich along with services to Swaffham, Swanton Morley, Watton and also a circular town service around Dereham itself.

4.9 As part of painting a comprehensive picture of Dereham town centre, we have worked with DTC to undertake a survey of businesses. 50 questionnaires were distributed and 28 completed questionnaires were returned. A summary of the key results were as follows:

- The majority of respondents (79%) leased their premises, whilst 14% were owner-occupied.
- In relation to catchments, all businesses indicated that they serve local residents whilst 71% also serve residents of nearby towns. 43% of respondents also indicated that they served visitors/tourists.
- In relation to plans to change their business over the coming year, around 50% indicated that they had no plans for investment. 39% indicated that they would re-fit/extend/improve whilst 7% intended to diversify.
- The main issues raised as constraining the performance of businesses were: rents/overheads (25%), level of trade/lack of customers (32%), staff recruitment (21%), availability of parking (11%), broadband connectivity (14%), competition from other businesses in the town centre (21%), competition from out of town stores (14%).
- In terms of addressing the issues outlined above, respondents provided the following suggestions: more parking (14%), increased policing (11%), reduced overheads (25%), more national multiple retailers in town (18%), promotion of the town to local residents (43%), promotion of the town to visitors (36%), improvements to the public realm (14%) and more community/business events (32%).
- In terms of existing attributes of the town which respondents considered benefitted town centre businesses, the following were noted: good availability of car parking (43%), good road network (25%), the growth of the town (32%), good bus services (51%), local demand for products/services (21%) and a variety of places to eat/drink during the day (32%) and evening (29%).

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- Respondents were asked to rate different aspects of the town centre (10 = best score) and the following average ratings were provided:
 - Rent/rates – 3
 - Availability of car parking – 6
 - Broadband connectivity – 5
 - Traffic circulation – 4
 - Safety (daytime) – 6
 - Safety (evening) – 5
 - Range of shops – 5
 - Quality of shops - 5
 - Range of entertainment facilities – 4
 - Quality of public realm – 4
 - Marketing of town centre – 3
 - Events in town centre - 3
 - 50% of respondents indicated that Dereham town centre had declined over the past year, whilst 21% suggested it had improved and 18% suggested that it had stayed the same.
 - In relation to their own trading performance, 60% of respondents indicated that it had improved (35%) or stayed the same (25%). 14% of respondents indicated that it has declined.
 - In terms of expectations for business performance over the next 12 months, 50% of respondents stated that they intended performance to improve, whilst 16% considered performance would be static and only 5% thought that performance would be poorer.
 - The following measures were suggested as ways to improve Dereham town centre: increased range of shops (71%), more national multiples (21%), more independent specialist retailers (36%), more arts and cultural facilities (29%), more organised events (32%), greater promotion/marketing (36%), improved traffic management (46%).
 - Respondents were also asked specifically about potential changes to Market Place which would improve it as a central focus for the town centre and the following suggestions were received:
 - A number of respondents indicated that pedestrianisation would be an improvement in order to provide more pedestrian friendly areas.
 - There were mixed views over whether the bus stops should remain in Market Place.

- Scale of traffic through Market Place was also indicated as a concern, including the use of the network by HGVs.
- A number of respondents also indicated that more events in Market Place would be an improvement.

Retail and Leisure Needs

4.10 When assessing the need for retail floorspace within a particular area, it is common practice to consider both quantitative and qualitative needs. This is reinforced by paragraph 161 of the NPPF. The latest assessment of quantitative need for retail floorspace in Dereham can be found in the 2017 retail study which identifies the following capacity for growth:

Table 4.x: summary of quantitative retail floorspace forecasts in 2017 retail study

	2017-2026	2026-2036	Total
<i>Convenience</i>			
Net sales floorspace	868sq m	1,082sq m	1,950sq m
Gross floorspace	1,240sq m	1,546sq m	2,786sq m
<i>Comparison</i>			
Net sales floorspace	1,756sq m	3,464sq m	5,220sq m
Gross floorspace	2,342sq m	4,618sq m	6,960sq m
<i>Food and Beverage</i>			
Gross floorspace	352sq m	497sq m	849sq m

4.11 In general terms:

- the growth in quantitative capacity in the 2017 retail study is stronger than the 2014 retail study due to the allocation of a larger number of new homes to Dereham in the draft Breckland Local Plan;
- the amount of quantitative capacity for comparison goods floorspace is higher than convenience goods floorspace;
- there has been an increase in the amount of comparison goods floorspace capacity since the 2014 and a decline in the amount of capacity for additional convenience goods floorspace.

- 4.12 However, as noted in Section 2 of this report it would appear that the new ALDI store in Dereham has been omitted from the latest capacity analysis. The decision notice, issued by BDC, indicates that the store has a maximum sales area of 1,140sq m and 80% of this area will be used for convenience goods sales. Based upon the sales density adopted by Lichfields for another ALDI store in Thetford¹⁰, this would provide a benchmark turnover of circa £10.5m per annum.
- 4.13 If this (ALDI) turnover is added to the benchmark turnover of stores in Dereham then this eliminates any surplus expenditure capacity until after 2026, with circa £5m, at 2031 and circa £12m at 2036.
- 4.14 To put these (BDC) growth figures into perspective:
- The total comparison goods floorspace requirement of 5,220sq m net by 2036 represents a 22% growth in floorspace. The growth over the period 2017-2026 (1,756sq m net) represents a growth of circa 7%.
 - The total convenience goods floorspace requirement, as set out by Lichfields, of 1,950sq m net by 2036 represents a 21% growth in floorspace in the town. However, if the corrected figure is used then the scale of growth is much lower at 12%.
- 4.15 It would therefore appear that comparison goods floorspace is the higher priority for new retail development in the short to medium term.
- 4.16 However, in addition to the corrections required for the ALDI store, there is also a need to understand how quantitative capacity would grow if more homes were built in Dereham over and above the targets set by the new draft Local Plan. For example, we understand that DTC are considering the identification of between 1,000 and 1,300 additional homes above the circa 1,500 unit target set out in Policy HOU 02 in the Pre-Submission Publication Local Plan. We have therefore included an analysis at Appendix VI to this report which makes an assessment of the potential increase in spending capacity in Dereham associated with either 1,000 or 1,300 additional new homes up to 2036. The analysis, contained in Tables 1 and 2 at Appendix VI, makes the following assumptions:
- The analysis covers potential additional spending in the following categories: convenience goods, comparison goods and spending on food and beverage on cafes and restaurants.
 - There is an average of 2.2 persons per new household;
 - average spending per capita is taken from the 2017 Retail Study Addendum for the Dereham zone (Zone 2);

¹⁰ £11,557/sq m

- it has been assumed that the residents of the additional homes will act, in terms of shopping behaviour, in the same way existing residents of the town and therefore the market share levels in the 2017 Retail Study Addendum have been adopted; and
- in order to convert the amount of additional spending in Dereham into a floorspace capacity equivalent we have used the same generic sales densities as the 2017 Retail Study Addendum.

4.17 The contents of Tables 1 and 2 indicate that between 1,000 and 1,300 additional homes could general additional capacity along the following lines:

- 350-450sq m net convenience goods floorspace
- 710-930sq m net comparison goods floorspace
- 210-270sq m of food and beverage floorspace

4.18 Tables 4 and 5 add the above convenience goods floorspace figures to our corrected version of the 2017 Retail Study Addendum forecasts which take into account the new ALDI store and indicate that, overall, the additional of between 1,000-1,300 residents units will lead to an overall quantitative capacity for convenience goods floorspace of between 1,380-1,486sq m net by 2036

4.19 This will need to be taken into account assessing the capacity of potential retail development sites and this is covered within the next sub-section of the report.

4.20 Turning now to qualitative issues, the 2017 retail study did not provide an updated qualitative assessment of retail floorspace, so therefore reference must be made to the 2014 retail study. As noted in Section 2 of this report, the 2014 retail study concluded that:

- Based upon the range of foodstores present, and its ability to retain around 80% of locally-generated expenditure, there is no qualitative deficiency in foodstore provision;
- Dereham has the best representation of comparison goods retailers in the District and is able to retain around half of its locally-generated comparison goods expenditure. The study considered this to be a reasonable level of retention bearing in mind the size and strength of the Norwich shopping catchment area. The study did not outline any specific qualitative aspects for improvement although it did indicate that the main objective will be to maintain the District's shopping role and market share in the sub-region, in the face of increasing competition.

- 4.21 We consider this to be a sensible overview of the qualitative needs picture in Dereham. Given the proximity of Norwich, Dereham is unlikely to retain all of its locally-generated convenience goods expenditure (due to food shopping trips in Norwich associated with work and other types of shopping). A similar conclusion can also be reached in relation to comparison goods shopping, with the strength of Norwich's comparison goods retail offer always likely to influence surrounding market towns. Indeed, in our experience, a retention rate of circa 50% for comparison goods shopping in Dereham should be considered to be a good level of performance and we agree with NLP/Lichfields that the focus should be on maintaining this market share. This does not mean that new comparison goods floorspace should not be promoted, but instead there should be some realism in the plan making process in terms of the future aspiration for the town.
- 4.22 It also should be borne in mind that the quantitative need forecasts are based upon expenditure capacity in the local area and the ability to proceed with retail development opportunities will be influenced by retailer demand. There are instances, in our experience, where retailer demand will not closely match the expenditure capacity forecasts due to the circumstances of a particular town. The brief for this Study does not allow for new empirical research but we would suggest that demand from comparison goods retailers could be constrained by the influence of Norwich. Therefore, the quantitative figures should be used as a guide.
- 4.23 It should also be noted that the needs forecasts with the 2014 and 2017 retail studies are for the town as a whole and whilst national policy and BDC's policy is to pursue a town centres first approach to retail and other main town centre uses, the inability to accommodate development on town centre sites could lead to the promotion of less central locations and this is discussed in the next sub-section of this report.

Development Opportunities

- 4.24 A key area of any development plan document is the allocation of land for (re)development to meet identified needs for retail and other main town centre uses. Within Dereham, the single retail / town centre allocation is the Georges Road/Nunn's Way/Cowper Road area which is included in Policy D6 of the SSPP DPD¹¹. We note that the allocation is proposed to be taken forward in the new Breckland Local Plan although, at the present time, this is only on the proposals map and no mention of the site is made in the current draft text of the Plan.
- 4.25 The SSPP DPD outlines the prospect of the D6 allocation accommodating circa 4,900sq m net comparison goods floorspace and circa 1,800sq m net convenience goods floorspace. This is lower than the Core Strategy allocation for Dereham, particularly for comparison goods

¹¹ See plan at Appendix I

floorspace, and this is due to the completion of a retail study in the period between the adoption of the Core Strategy and the SSPP¹².

4.26 We are not aware of any masterplanning / physical capacity testing work being undertaken to show how the SSPP allocated floorspace can be accommodated on the D6 allocation and therefore this raises three issues:

- Whether DTC is supportive in principle of the Georges Road/Nunn's Way/Cowper Road allocation as a potential area of growth/change for the town centre;
- Whether, if there is support for redevelopment, this area can accommodate the level of retail floorspace outlined in the SSPP; and
- Whether Policy D6 needs to change in terms of quantum of floorspace due to the publication of the 2017 Retail Study Addendum.

4.27 For the purposes of this assessment we have assumed that there is general support from DTC for this allocation although we fully appreciate that this is a busy part of the town centre, particularly for parking, and therefore growth/change in this area has a number of linked issues to consider.

4.28 We consider that the Georges Road/Nunn's Way/Cowper Road area is of particular importance to the retail and town centre uses strategy for both the new Breckland Local Plan and also the Dereham Neighbourhood Plan. Its identification is an acknowledgement of the town centres first approach outlined in national planning policy and allows the town centre to continue to be the focus for new retailing and main town centre uses. In turn, reduces the pressure on the need to allocation out-of-centre sites for retail and other main town centre uses.

4.29 **However, there are a number of issues which DTC need to consider in relation to this area. First, there is a need to get the new Breckland Local Plan to acknowledge the potential of the Georges Road/Nunn's Way/Cowper Road area. It is assumed that this is simply an oversight in the current drafting of the Local Plan main text but needs to be rectified.**

4.30 **Second, alongside the inclusion of the D6 allocation, there will be a need to update the floorspace figures in the allocation to reflect the latest 2017 Retail Study Addendum (including the rectification of any errors in the 2017 capacity calculations). This will need to be considered alongside the capacity of the site and whether additional sites can be identified by the Neighbourhood Plan (see below).**

¹² In 2010

- 4.31 Third, we are not aware of any detailed work being undertaken on the potential development options for the Georges Road/Nunn's Way/Cowper Road area, the attitudes of land owners and how development may be phased. Whilst it is only reasonable that any detailed work is left until there is tangible interest in developing new retail and other main town centre uses, it should be borne in mind that development plan allocations should be supported by evidence of deliverability and that as and when retail development interest in Dereham occurs a 'road map' is in place in order to progress this 'town centre first' opportunity.
- 4.32 Therefore, we consider it vital for the Neighbourhood Plan to undertake further investigative work in order for the Georges Road/Nunn's Way/Cowper Road area to form part of the town centre strategy in the Neighbourhood Plan. This should include: gathering up-to-date information on land owners, considering options for car parking capacity and assessing which parts of the site present the most suitable opportunities for retail development. DTC should put pressure on BDC (as land owner and local planning authority) to promote investigative work to ensure that this allocation is delivered.
- 4.33 In addition, it would be useful for the Neighbourhood Plan to promote other areas of the town centre which can absorb new uses/development. An example of this is Wrights Walk Phase 2 which is briefly considered by the 2014 Retail Study. We consider that it is an omission from the new Local Plan proposals map and DTC should push BDC for its inclusion. We consider that its inclusion with part of the development plan will help to ensure that the town centre is shown to be capable of accommodate the identified needs for retail and other main town centre uses.
- 4.34 We also recommend that, in line with the observations of the 2014 Retail Study, vacant units in the town centre are also highlighted as being able to accommodate an element of the identified need for retail uses.
- 4.35 In order to provide a general idea of the relationship between the identified quantitative need for Class A retail floorspace and the opportunities presented by sites and premises in the town centre, Tables 6, 7 and 8 at Appendix VI provide a range of scenarios based on varying levels of quantitative floorspace need and the potential capacity of town centre redevelopment sites and premises. The following scenarios are presented:
- Table 6 – outlines the capacity of town centre sites and premises to accommodate the quantitative projections in the 2017 Retail Study Addendum (as amended by this report) and assumes that the Policy D6 allocation is able to accommodate circa 6,000sq m gross Class A retail floorspace.
 - Table 7 – as per Table 6 but excluding the Policy D6 allocation from the physical capacity assessment.

- Table 8 – as per Table 6 but including a higher level of quantitative need for retail floorspace as a consequence of DTC promoting an additional 1,300 residential units in Dereham over the period to 2036.
- 4.36 From the outset it should be noted that we have made a very broad assumption over the potential physical capacity of the Policy D6 site. As noted above, we are not aware of any physical capacity testing being undertaken by BDC in support of the Policy D6 allocation and therefore we have measured the western element of the allocation¹³ which is the area most likely to act as a suitable extension to the town centre core area. This area measures 1.1 hectares and, bearing in mind the need to re-provide servicing and access arrangements, we consider that, as a rough estimate, a maximum footprint of 6,000sq m gross can be accommodated in this area.
- 4.37 We have also, when considering physical capacity issues, taken on board the recommendation of NLP in the 2014 Retail Study Update that around 25% of the identified capacity should be allocated to the re-occupation of vacant premises in the town centre.
- 4.38 On this basis, Table 6 shows that within the Policy D6 allocation, and the re-occupation of vacant premises, there will be almost sufficient floorspace to meet the identified quantitative capacity for convenience, comparison and food/beverage floorspace up to 2036 (with a short-fall of only circa 500sq m gross). However, Tables 7 and 8 show that if the D6 allocation is removed/not delivered or higher levels of quantitative capacity are pursued (due to an increased level of house-building) then there will be insufficient to accommodate the quantitative need. Therefore, whilst (as noted in the previous sub-section) qualitative factors may also influence the level of retail floorspace which needs to be provided, the current Local Plan strategy is particularly reliant on the Policy D6 allocation and this should prompt BDC and DTC to work together to identify and unlock the key tasks for the delivery of redevelopment.

Transport and Access

- 4.39 Transport issues are commonly a key influencing factor in town centre health, performance and attractiveness and in relation to Dereham town centre the key issues highlighted by DTC and ourselves are traffic movements through the centre and also car parking and accessibility issues. DTC is considering accessibility and traffic issues separately although the key issues emerging from this work are that:

¹³ Land to the west of Cowper Road

- The vast majority of the traffic is internal movements rather than through movements especially on a Saturday¹⁴.
 - Improving cycling should be viewed for its economic benefits not just its health benefits. The traffic network in Dereham is likely to continue to be congested at peak times and therefore good cycle infrastructure to the town centre will enable some people, if congestion continues to get worse, to choose cycling over cars. With good cycle infrastructure, the road network has the capacity to become a self-regulating system (i.e. as congestion gets worse, more people will move to cycling and this relieves pressure on the roads and enable more visits to the town centre which will be a particular advantage at weekends). To enable this to operate policies need to be put in place, that improve the environment for cycling without reducing the car carrying capacity of the roads. It is about increasing footfall not necessarily increasing a particular form of transport.
 - There are a number of key challenges to improving the permeability of the town centre for cyclists. Accessing the town centre from the south east has barriers around Yaxham Road, Tavern Lane and Lynn Hill. From the East there is no direct route to the town centre, from the Northeast of the town there are barriers on Theatre Street and from the Northwest there are barriers at Swaffham Hill.
- 4.40 The full results of the accessibility work will be contained in separately published studies.
- 4.41 In relation to car parking provision, there are seven main car parks in the town centre. These are:
1. Swaffham Hill
 2. Guildhall
 3. Cowper Road East
 4. Cowper Road West
 5. Cherry Tree
 6. Morrisons
 7. Wrights Walk
- 4.42 Those numbered 1-5 above are maintained by BDC, with the remaining two in private ownership and control. Car parking surveys for sites 1-5 were undertaken by BDC in 2016. Whilst there are long-standing local objectives to encourage modal-shift and visits to town centres by means other than the private car, car parking is likely to remain, for the foreseeable

¹⁴ for the AM peak period 23% of traffic entering the town is through traffic; for the PM peak period this is 15% and for Saturday peak period 16% of traffic entering the town is through traffic

future, a very important influence on how people visit (and view the attractiveness of) town centres. Generally, parking issues can be categorised into: capacity, pricing and location/attractiveness. We deal with each in turn below.

- 4.43 Overall, whilst it would appear from the 2016 parking surveys (contained at Appendix II) that there is spare capacity in the five surveyed car parks during the week and on Saturdays, there are, in our opinion, some important points to bear in mind. First, these surveys have sought to ascertain current usage and present data on the length of stay and turnover of spaced throughout the day. Whilst there is the desire to see private car usage fall (in favour of other modes of transport), it must be remembered that Dereham has, in part, a rural catchment and subject to proposals in the draft Local Plan for a significant number of new homes over the next two decades. Therefore, an allowance for increasing parking demand should be allowed for when judging the suitability of existing parking facilities.**
- 4.44 The scope of this study does not extend to a detailed set of forecasts, although we have calculated the likely number of homes at 2016¹⁵ and the likely additional homes to be built up to 2036¹⁶. This is contained at Appendix III and shows a potential 16% growth in the number of homes between 2016-2036. Appendix III also provides a summary of the 2016 car parking survey data for each of the five surveyed car parks, showing the minimum free spaces and maximum spaces used for each facility at the time of the 2016 survey. We have then applied a 16% growth rate to the 2016 'maximum spaces used' and this shows that the surplus capacity at 2016 is significantly eroded with much fewer available spaces.
- 4.45 In our experience the maximum recommended occupancy level for public car parks to operate efficiency is 85%. As a consequence, the five surveyed car parks in Dereham are already operating close to this level and only Guildhall and Cherry Tree on a Saturday will operate under this level. As a consequence, we would recommend the following for the Neighbourhood Plan:**
- **Consideration is given to the use of a safeguarding policy for the existing car parks, based upon both capacity issues and the importance of the car parks to the overall health of the town centre.**
 - **In light of the lack of a proposed policy in the draft Local Plan regarding building on car parks, DTC to consider the introduction of a policy in the Neighbourhood Plan dealing with the need to maintain an adequate number of short and long-stay spaces available in the town centre.**

¹⁵ Using ONS figures from the 2001 census and completions data (from the 2016 BDC Annual Monitoring Report) for 2001-2016.

¹⁶ Using data from the Pre-Submission Local Plan and the 2016 BDC Annual Monitoring Report

4.46 In relation to pricing, the decision not to charge for parking is unsurprisingly considered as a general benefit to the attractiveness of the town centre¹⁷. It can, in general terms, set Dereham town centre apart from competing destinations, such as Norwich¹⁸ and also out-of-centre stores within Dereham¹⁹. However, there are linkages between free/charging policies and other factors:

- The provision of free parking in Dereham town centre is likely to be attractive to both shoppers/visitors and workers. There is anecdotal evidence that workers are using the Cherry Tree car park in association with bus travel in to Norwich and this appears to be supported by the usage data from the 2016 car parking surveys.
- Workers using the Cherry Tree car park unsurprisingly occupy the spaces closest to the entrance (due to the time that they arrive) which leads to town centre shoppers having to walk further in to the primary shopping area from this car park.
- Management of this situation at Cherry Tree, along with the enforcement of regulations at other car parks is likely to prompt the introduction of car parking charges. This could have mixed effects in terms of making Cherry Tree work better for town centre shoppers/visitors but may have a negative effect upon the number of such visitors/shoppers. One way of steering through this issue is to keep short stay free (say for up to 3 hours) and charging for longer stays.
- There is also the issue of car parking capacity and whether charges are needed to create capacity by discouraging visitors work are attracted to the town centre for parking but do not benefit shops and services. As noted above, it is possible that most car parks could reach their operational efficient capacity in the future if parking demand rises in line with house-building.

4.47 There is not a significant amount of research on this subject although research conducted for Welsh Government²⁰ indicates that there is not a 'one size fits all' approach and charging cannot be viewed in isolation from other factors (such as the ones outlined above). For example, the provision of free parking may not be beneficial in all examples and any pricing regime must be tailored to the demographic and retail/business offering nuances of the local area. We consider that the key issues for Dereham are capacity, the attractiveness of the lack of charges and the lack of on-going management.

4.48 It appears that the primary threat to the successful operation of car parks in Dereham is the potential shrinking amount of capacity in the future. Where car parks become inefficient and reach effective capacity this can affect views and perceptions over the attractiveness of the centre and could lead to shopping trips being diverted elsewhere. This will have an effect on

¹⁷ See conclusions of the 2014 Retail Study

¹⁸ i.e. for price-conscious shoppers who may weigh up the cost of travelling to Norwich against a trip to Dereham

¹⁹ All of which have free car parks and are direct local competitors to the town centre

²⁰ 'Assessing the Impact of Car Parking Charge on Town Centre Footfall' – MRUK, March 2015

footfall and the overall viability of the town centre. It appears that the answer to this situation is the introduction of management and the charging of those people who are using the car parks for long term stays (i.e. workers). Therefore, one option could be to charge this group for long stays and leave short stay visits (say, up to 3/4 hours) free.

External threats / influences

4.49 Dereham town centre functions within the context of a wider hierarchy of other centres in the sub-region and other competing (physical) facilities. In addition, like all other town and city centres, it faces competition from retailing on the internet. As such, any town centre strategy needs to take into account these influences in order that any initiatives are considered to be realistic. As a consequence, this sub-section considers the following potential influences for Dereham town centre:

- Norwich and transport links;
- The influence of the internet;
- Out of centre retailing in Dereham.

4.50 Due to its size, location and range of retail, leisure, arts/culture and other main town centre uses, Norwich will always be a significant influence on the function of Dereham and other surrounding towns in this part of Norfolk. In relation to retailing, its influence extends across a wide area, particularly for comparison goods shopping and is likely to be the focus for many mid to higher order retailers. The 2014 Retail Study and the 2017 Retail Study Addendum rely on a shopping patterns survey from 2014 which indicates that around half of all comparison goods expenditure from the Dereham area²¹ flows to in-centre and out-of-centre stores in Norwich. This situation is likely to continue for the foreseeable future, despite the lack of any significant current retail commitment in the city, due to the following reasons: (A) the sheer strength of the comparison goods retail offer in the city; (B) the attractiveness of other uses/destinations in the city to encourage days out/trips; and (C) allocations in the Norwich development plan for additional retail space.

4.51 Indeed, rather than aspiring to a significant increase in Dereham's market share, the 2014 Retail Study²² indicates that investment is needed to retain existing levels of comparison goods expenditure and that *"the objective of the retail development strategy for Breckland should be to maintain the district's shopping role and market share in the sub-region, in the face of increasing competition"*. Therefore, realism is required as to how Dereham can compete

²¹ Zone 2 of the study area – see Appendix IV

²² Paragraph 4.108

against centres such as Norwich and what it is able to achieve in terms of a broadened retail and leisure offer.

- 4.52 However, whilst Norwich may understandably be seen as a constraining influence on the level of shopping trip retention in the Dereham area, it's proximity also brings a number of potential benefits. In particular, transport links (including public transport – i.e. bus services) are already reasonably good and this offers the opportunity for some of the working population to choose to live in Dereham and work in Norwich. In addition, the proposed duelling of the A47 is also like to create opportunities for Dereham to become an even more convenient location. This suggests that, whilst Dereham is unlikely to become a significant rival to Norwich in terms of mid to higher order retailing and leisure/cultural uses which require a large catchment, it has the potential to embrace a growing resident population who will require a range of shops and services to meet their day-to-day and leisure needs. This potential growth has been reinforced by the recent change in residential development strategy in the emerging Breckland Local Plan which places a materially greater amount of new house-building within the town.
- 4.53 A further external influence which affects all town and city centres is the use of the internet for the purchase of retail goods, particularly comparison goods. The rise in spending on retail goods via the internet is documented in the previous section of this Study and it is unlikely in our opinion that any local actions can be taken to materially influence this much wider trend. However, as documented in Section 3, there are some opportunities created by internet shopping and this surrounds click and collect and the Amazon style 'delivery locker' concept. Where customers chose to pick up their purchased goods at a town centre location, the available research suggests that there can be spin off benefits for other parts of a centre. Therefore, whilst
- 4.54 The final potential external influence to the town centre is out-of-centre retail stores. This is a long-standing influence and one which has grown over the last 30 years across the UK. Within Dereham, there are a number of foodstores/supermarkets (Tesco, Lidl and the recently developed ALDI) to the south of the town centre along with several retail warehouse units including:
- Brecklands Retail Park, Yaxham Road – Homebase, Poundstretcher and Carpetright
 - Halfords and Jollyes, Yaxham Road
- 4.55 Whilst a number of these retailers can be classified as traditional 'bulky goods' stores, the sub-division of the Homebase store shows how out-of-centre retail units can evolve over time. Indeed, the occupation by Poundstretcher follows the issuing of a Certificate of Lawfulness over Units 2 and 3, meaning that any type of retail goods (in any combination) can now be

- sold from these premises. It is understood that the leases on each of these three units will be up for renewal in the next few years, suggesting that some change may occur in the range of goods which could be sold from this location and how it could compete with the town centre.
- 4.56 Whilst there is now no further ability to control the future use of part (or possibly all) of Breckland Retail Park, this does illustrate the importance of attaching appropriate controls to out-of-centre retail property.
- 4.57 In relation to the foodstore/supermarket sector, this has, with some exceptions, been subdued in recent times following the troubles experienced by the Big 4/5 operators (Tesco, Sainsburys, ASDA, Morrisons and Waitrose). Since 2013/4 there has been a significant drop in the number of new large stores being promoted by these companies as the previous 'race for space' over the previous decade has led to an over saturation of space in the market.
- 4.58 The one area where growth continues to occur is in relation to the discount end of the grocery sector. In recent years ALDI and Lidl have made significant gains in terms of their market share in the grocery sector. This has been through both a significant increase in their popularity and also an aggressive expansion of their estates. ALDI have recently opened a store in Dereham, but we understand²³ that Lidl are keen on securing a relocation of their current store (the main driver for which is likely to be a larger store rather than any particular issues over their current location).
- 4.59 Iceland has also recently more aggressive in the expansion of its own retail store estate with a new format called The Food Warehouse. There is not a published list of desired locations although we consider that Norwich is likely to be an immediate priority although Dereham should not be ruled out as a medium-term prospect. Should a requirement occur, then consideration will need to be given to the future of the existing Iceland store in the town centre as an out-of-centre Food Warehouse may reduce/remove Iceland's business requirement for the smaller town centre store (which could have an impact upon the health of the town centre).
- 4.60 Therefore, in terms of the external factors which could have an impact upon Dereham town centre, we recommend the following for the Neighbourhood Plan:
- An acknowledgement that, in line with the recommendations of the 2014 Retail Study, continued investment in the town centre is needed in order to maintain the town's market share in the face of competition from Norwich.
 - An acknowledgement that the town's relationship with Norwich and the current decision of BDC to promote additional house-building in Dereham leads to an opportunity for greater resident population who can support shops and services in the town.

²³ Based upon Lidl's April 2017 published requirements list

- An acknowledgement that whilst an increasing amount of retail expenditure is being directed through the internet, Dereham town centre has a role to play in supporting this shopping channel. In particular, through encouraging click and collect functions within high street stores along with Amazon Locker drop-off style locations.
- An acknowledgement that the town centre is likely to continue to be influenced by out of centre retail floorspace in Dereham (both through evolution of existing floorspace and also future proposals). Therefore, the Neighbourhood Plan will need to consider whether it needs to introduce further policy/strategy on out-of-centre retailing (see later in this section for further discussion on this topic).

Marketing and Non-Planning Initiatives

- 4.61 It must be acknowledged that land use planning actions, through either development plan making and development management functions, can only go so far in terms of maintaining and enhancing the health and attractiveness of town centres. An equally key contribution is through what we have termed: non-planning initiatives. These may be the pro-active marketing and management of town centres and can be actions performed by different groups such as town centre management, District and Town Councils and local interest groups (such as a Chamber of Commerce).
- 4.62 In Dereham, it is clear to us that DTC is already playing a significant role in the marketing and informal management of the town centre. This is to be commended and it is clearly making a positive contribution to the centre. This sub-section of the Study considers what existing/further non-planning initiatives can help to maintain and enhance the health of the town centre.
- 4.63 A useful place to start is in relation to existing initiatives, tourist/visitor destinations which are organised by voluntary organisations some of which have had financial support from DTC to get established). These include:
- the Memorial Hall
 - Dereham Blues Festival
 - Dereham Windmill
 - Dereham Walkers are Welcome
 - Dereham Carnival
 - Mid-Norfolk Railway

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- 4.64 In addition, and as noted in earlier in this chapter, there are other permanent leisure attractions such as the town centre cinema, along with the leisure centre and Strikes bowling alley which lie on the edge of the centre.
- 4.65 These initiatives and events are, in our opinion, very important to the town centre and Dereham as a whole. They do three things. First, they keep Dereham on the short list of the local population's 'things to do'. Second, these events become regular/annual events that become a habit for reasons to visit Dereham. Third, they offer variety in terms of the events attracting different groups during different times of the year.
- 4.66 Whilst we have not experienced any of the major events (such as the carnival or blues festival) during the course of completing this Study, it is important that town centre businesses and landlords 'buy in' to these events. They can benefit from the extra visitors to the town centre and contribute to the overall experience of visiting Dereham. The major 'events' such as the blues festival and the carnival have a particular contribution to make in terms of benefits to eating and drinking establishments and hotels (and we note that the pub landlords are very much involved with the festival). We consider it very important that these events continue and opportunities are taken to provide sustainable improvement/expansion. **Consideration should be given to whether DTC and the Neighbourhood Plan can provide assistance and/or whether other funding/management/marketing sources are necessary.**
- 4.67 A further attractor to the town centre is the twice-weekly market (Tuesday and Friday). The market has moved location in recent years and is now held in the Market Place, with Friday's market being the larger. It is very much a general market, selling food, plants and non-food goods and makes an important contribution to the health and attractiveness of the town centre. The market is organised by DTC and whilst its location in the Market Place is, in our opinion, the correct location, it suffers from physical constraints in terms of: conflict with traffic, bus movements and a physical limit on its size due to road infrastructure.
- 4.68 The continuation of these markets is of particular importance to the town centre and it would appear to us that, in light of the successful management by DTC, improvements should focus on the following areas:
- Physical layout. As noted above, the market is in the right place, but cannot expand and faces operational constraints due to vehicular traffic in Market Place. Therefore, whilst the market is not the sole driver for change in the layout of Market Place it is a key factor in support of changing Market Place. This is discussed in more detail elsewhere in this chapter but an improved public realm in Market Place is likely in our opinion to make (A) the market more attractive to shoppers (B) loading and unloading by traders easier and more efficient, and (C) offer the opportunity to expand.

- Farmers Markets. It is understood that a previous farmers market in Dereham did not succeed due to lack of support. There were no doubt some good reasons for this situation, but we consider that farmers markets continue to offer a particular positive contribution to the health of town centres. Many town centres across Norfolk have a regular farmers market with towns taking it in turns to host producers once a month. It is quite possible that some of the existing traders in the weekly markets in Dereham could also be attendees at other farmers markets but with a reorganised Market Place we consider that the opportunity to hold a farmers market again (either as a stand-alone event or as part of an extended Tuesday or Friday market) should continue to be explored. Our experience of the farmers market in Stroud farmers market (held every Saturday) is that it attracts a much wider range of shoppers to Stroud (from the Cotswolds and other parts of Gloucestershire) who would not normally come to Stroud for day-to-day retail and service needs.

4.69 In relation to general management/promotion issues, DTC is not alone in being able to promote and support the town centre. Other voluntary and interest groups can make a contribution and in some cases may require financial support in order to achieve their aims. There are, of course, a number of different ways in which contributions can be made, although the possibility for DTC to encourage this are as follows:

- Voluntary groups. We understand that voluntary groups have, in the recent past, made important contributions to the running of events and physical features in the town centre. This can be an efficient and effective way of managing projects, particularly those which are not regularly occurring event and cannot be supported by the public sector. We understand that DTC has provided funding to voluntary groups on a piecemeal basis in the past, although it is likely that some projects could benefit from the certainty of funding over a number of years. This may help projects to establish themselves in a scenario where they would not have been viable and also help them to become well-known 'regular events' in the annual Dereham town centre diary.
- Business Improvement Districts ('BID'). In recent years, town centre businesses and other groups have come together to form BIDs. A BID²⁴ is a defined area where businesses are required to pay a levy/tax in order to fund projects in the district's boundaries. The BID can also draw upon other public and private funding streams. In order to establish a BID a business case needs to be submitted to the local authority and a successful vote in favour of the BID achieved. A successful vote is one that has a simple majority both in votes cast and in rateable value of votes cast. All businesses in the proposed BID area receive one vote. Usually the levy rate is between 1% and 4% of rateable value. A successful has

²⁴ <https://www.gov.uk/guidance/business-improvement-districts>

established itself in Norwich city centre²⁵ and it appears sensible to us that consideration should be given to whether a BID Dereham would be viable, effective and successful. In order to establish this consideration should be given to whether there are potential projects which require financial support which cannot be funding under existing means and would make a positive difference to the attractiveness and performance of the town centre. Crucially, this appraisal process would need to consider the appetite from existing retailers and other businesses for the creation of a BID and what it may do for Dereham town centre.

- Section 106 contributions. A further source of funding for town centre health, albeit one which is inconsistent, is via Section 106 agreements attached to planning permissions for development which is shown to have an impact upon town centres. Traditionally, financial contributions for town centres have come from out of centre retail development proposals which are forecast to have an adverse impact upon the centre. Therefore, such funding is a double-edged sword in that it is intended to mitigate a negative impact rather than funding for positive improvement. However, other development proposals, particularly large scale residential schemes are also contributing to town centres particularly where they are, for example, putting pressure on car parking demand levels²⁶. This should be considered by DTC as new residential development occurs in the town and a published strategy in the Neighbourhood Plan will help to secure justified contributions. Whilst, in strict terms, this is a planning initiative, the funds raised via Section 106 contributions can, in some instances, fund non-physical activities such as events and the marketing of the town centre.

Infrastructure / Public Realm

- 4.70 A key part of the overall attractiveness of any town centre is how it is experienced by local residents and visitors. A centre which is attractive and easy to negotiate will make visitors more relaxed, offering the potential for longer lengths of stay and return visits. A key element to this experience is the quality of the public realm in terms of both aiding movement and also its ability to support retail and other uses and host events.
- 4.71 The focus for the town centre is Market Place. Its format developed in response to the historic market function and has been rebuilt on two occasions after destructive fires. It provides a

²⁵ <http://www.norwichbid.co.uk/>

²⁶ An example of this is the Chesterton urban extension project in Cirencester in the Cotswolds. This is a 2,350 unit urban extension on the southern edge of the town and Cirencester's historic town centre suffers from high levels of parking demand against limited supply. Given that Chesterton will significantly expand the resident population of Cirencester and increase usage of the town centre, it has been agreed that the promoter of the urban extension will contribute £500,000 towards the improvement of car parking facilities in the town centre. In addition, a further contribution is being made to new cycle parking areas in the town centre.

good sense of enclosure and its size relates well to the different styles of building which enclose the space. Because of its focus, Market Place accommodates a number of different functions. These include a main route through the centre of the town, a key alighting point for bus services visiting the town, the venue for the frequent market and also use of parts of the pavement areas for outdoor seating. This mixture of functions can sometimes cause conflicts, due to the limited space available, and the environment can appear cluttered. In addition, the need to accommodate a number of functions (including bus and traffic movements) can constrain the area which can be made available to the market.

4.72 During our discussions with DTC the prospect of improving and changing the appearance and function of Market Place has been mentioned. We agree that there are certainly a number of opportunities here, not least to improve its operation and allow it to become more of a landmark focus for the town centre.

4.73 The areas where change in the Market Place can make a positive difference for the town centre are as follows:

- Ease of pedestrian movement
- Continued public transport accessibility (loss of bus stops and public transport from Market Place will be, in our opinion, a significant retrograde step for the attractiveness of the town centre)
- Reducing the dominance of the private car
- Returning Market Place to a memorable centrepiece for the town centre
- Allowing the market to expand
- Creating a place for events

4.74 As a consequence, we consider that the Market Place project should be considered for a key initiative within the Neighbourhood Plan. It is a key area where DTC can make a material positive difference to the town centre in multiple areas including: improving the ease and efficiency of movement around the centre, the attractiveness of the town centre, making the centre a more relaxed and pedestrian friendly environment, allowing the regular to expand its scope, provide a high quality space for special events and provide better access to public transport.

4.75 However, it is fair to acknowledge that change for Market Place will affect different groups in different ways. Whilst a more pedestrian friendly environment could be provided, this could be at the expense of the number and location of parking spaces. Some businesses in and around Market Place may view changes to parking to affect them and there will, no doubt,

need to be a balancing exercise in terms of the needs and views of all users. Similar issues could apply in relation to the reduction or removal of private vehicles from part or all of Market Place.

4.76 Such was the experience of the recent £1.3m project to redevelop the Market Place in Cirencester town centre²⁷. This is a similar but slightly large space in the centre of Cirencester where parking, private vehicles, public transport, pedestrian routes and market areas all competed for space. The project has, through its lifetime, received mixed views from local residents. This is to be expected although in our view the redevelopment project, which is now complete (see photos at Appendix V), has made a materially positive impact upon the attractiveness of this part of Cirencester town centre.

4.77 Therefore, DTC should consider taking the lead and working with its partners (BDC and Norfolk County Council) to bring forward feasibility work on a redevelopment project for Market Place. We consider that there is a reasonable case for financial support to also come from BDC and NCC given that the likely improvements will meet a number of land use and transport objectives. It is likely to require the technical expertise of an urban landscape designer and a transport planner/highway engineer working to a set agreed brief from DTC (and its partners). The following stages of work are likely to be required:

- Setting an agreed vision for Market Place. This will require working with DTC, District Council, County Council, bus operators, market traders, the Dereham Access Group and town centre businesses to establish key objectives for the Market Place project.
- Alongside the setting of the vision, the consultant team will work to gather the evidence base data that they need to draw up potential redevelopment options. This will include the requirements of bus operators, market traders, local businesses, the level of traffic flow through this part of the town centre, along with topographic information and details of services which run under Market Place. The team may also wish to consider examples of similar public realm projects in town centres across the country drawing upon lessons learnt.
- The consultant team to draw up a series of options for how Market Place could change in order to meet the content of the vision. Alternative options should be drawn up and analysed in terms of how successfully they can achieve the aims of the vision and contribute to the attractiveness of the town centre. Broad costings for the options should also be drawn up.

²⁷ <http://cirencester.gov.uk/new-blog/2015/12/1/town-centre-regeneration-project>

- Following consultation with key stakeholders a preferred option should be selected and a set of proposed plans / schedule of works prepared in order that the preferred scheme can be costed for the purposes of funding applications.

4.78 If DTC considers that the Market Place project to be a key element of the future strategy for the town centre then there should be a prompt start on the above actions. This will contribute to the preparation of the Neighbourhood Plan and give DTC and its partners the best chance of securing funding for the project from external sources²⁸.

Planning Policy

4.79 A key part of this Study is to make recommendations for land use planning policies in the Neighbourhood Plan which might be required to supplement, or fill gaps left by, the new Breckland Local Plan. There is also a need to consider whether DTC needs to make further representations to the preparation of the new Local Plan.

4.80 These issues have been touched upon at different times during this Study and we can summarise the observations made to date as follows:

- There is a potential error in the retail floorspace capacity forecasts set out in Chapter 6 of the Pre-Submission Publication Local Plan document. This error is caused by the omission of the recently developed ALDI store in Dereham from the 2017 Retail Study Addendum which the Pre-Submission plan relies upon.
- Whilst the Policy D6 allocation from the SSPP DPD appears on the draft Proposals Map for the new Local Plan, there is no reference to the allocation in the main text. This needs to be rectified and the allocation updated to reflect current circumstances.
- If BDC fail to include the allocation in the Local Plan and/or fail to correct the retail floorspace capacity error, DTC to consider appearing at the future Examination in Public for the Local Plan.
- Whatever BDC decides to do regarding the Policy D6 allocation, DTC to include this potential redevelopment opportunity in the Neighbourhood Plan and consider undertaking further preliminary preparatory work to assess the delivery of the site.
- DTC to consider identifying additional retail/other main town centre use development opportunities such as Wrights Walk Phase 2 and also the contribution that vacant units in the town centre can make towards meeting identified needs.
- Asking BDC to make greater reference to the Dereham Neighbourhood Plan in the same way that the Pre-Submission plan does for the Attleborough Neighbourhood Plan.

²⁸ i.e. Section 106 contributions and other public/private sources

- Objecting to the 1,000sq m retail impact assessment threshold in the Pre-Submission plan as it is not justified and will not protect the health of Dereham town centre.
- 4.81 In addition to the above we recommend that the following policies are considered for inclusion in the Neighbourhood Plan: car parking and town centre development/changes of use policy.
- 4.82 As discussed earlier in this chapter, supply and demand issues regarding car parking in the town centre are a key issue and whilst DTC may wish to interrogate the recent car parking usage surveys in more detail, it appears to us that the growth of the town in the coming years will eat into the available capacity which exists in some of the centre's car parks. As a consequence, we consider that a policy safeguarding the car parks is justified and necessary in order to support the health of the town centre. The policy should indicate that there will be a presumption against the loss of spaces and that new development proposals (on the car parks or in other locations in the town) will need to be assessed against their impact on town centre parking and provide mitigation measures if required.
- 4.83 In relation to other policy designations, the Pre-Submission Publication Plan outlines the various areas and boundaries in the town centre²⁹. These boundaries appear reasonable and it is noted that BDC is proposing to move away from strict proportionate thresholds in the primary and secondary frontages. We understand that DTC has welcomed this approach, which we also consider to be sensible (in light of the evolution of town centres). However, whilst draft Policy EC05 of the Pre-Submission plan describes the character of each of the four different areas, there is no particular policy which deals with the assessment of development/change of use proposals and how, if at all, it should be applied in deciding planning applications. Therefore, if EC05 is unlikely to change as the Local Plan proceeds to adoption, we recommend that DTC consider a policy in the Neighbourhood Plan which provides this guidance. In line with the draft Local Plan, no proportionate/quantitative thresholds would apply although a series of criteria should be used to assess whether development/change of use proposals maintain and enhance the vitality and viability of the town centre. These will include:
- The location and prominence of the premises within the shopping frontage;
 - The floorspace and length of the frontage of the premises;
 - The number, distribution and proximity to other existing non-A1 premises, or with planning permission for such use, within the frontage in question and throughout the centre;

²⁹ Town centre, primary shopping area, primary retail frontage and secondary shopping frontage

- The particular nature and character of the use proposed, including the level of activity associated with it; and
- The level of vacancies in ground floor properties.

4.84 In addition to the various policies and strategies within the Neighbourhood Plan, we consider it useful if the Plan could include a section/sub-section on 'how the Town Council will help deliver the plan'. Based upon experience from the Stroud Town Centre Neighbourhood Plan this can be provided via a series of 'statements' (which will read in a similar manner to policies in the Neighbourhood Plan) which will cover matters such as:

- Town centre promotion – promoting a sustained programme of regular and one-off events and activities in the town centre.
- Car parks – DTC working with BDC and other stakeholders to make car parking as efficient and easily available as possible and keeping the potential for selective charging under review in order that the best interests of the town centre are achieved.
- Public realm improvements – for example, DTC taking a leading role in the redevelopment of the Market Place
- Transport and access – promoting the progressive improvement of access into and around the town centre by cycles and people with disabilities.

5. Conclusions and Recommendations

- 5.1 This report has been prepared by GVA for Dereham Town Council ('DTC') to provide a Town Centre Study ('the Study') for Dereham town centre. DTC is preparing a Neighbourhood Development Plan ('NDP') for the town and wishes to gain insights into the future opportunities and challenges facing its town centre to inform policies in its NDP.
- 5.2 Following initial public consultations on the NDP, DTC found that there is considerable enthusiasm for a vision for the town centre as the prominent retail, leisure and cultural centre of the town.
- 5.3 This Study therefore offers brief and focused insights on the need (if any) for new land use planning policy to revise and/or supplement the Local Plan policy, along with the opportunities for non-planning actions to realise an agreed vision for the town centre.
- 5.4 The Study has examined a number of key issues surrounding Dereham town centre and has made the following conclusions and recommendations:
- a. Retail floorspace needs:
 - The growth of Dereham in the medium to longer term will see a growing level of retail need, particularly in relation to comparison goods floorspace. A key objective will be to promote and support town centre development which can help to maintain Dereham's market share in convenience and comparison goods shopping patterns. As such every effort should be made to identify sites in Dereham town centre to meet the identified need for retail and food/beverage floorspace.
 - b. Development opportunities to meet identified needs:
 - In order to meet identified needs, the Neighbourhood Plan should support the Breckland Local Plan and identify sites for retail and other main town centre uses. This should include the Policy D6 allocation, Wrights Walk Phase 2 and the contribution that vacant units can make to meeting needs.
 - DTC should encourage Breckland District Council ('BDC') to allocate these sites in the new Breckland Local Plan although further detail regarding their development potential can be provided in the Neighbourhood Plan.
 - c. Parking issues:
 - Recent parking surveys show that some car parks in Dereham town centre are already at capacity and others, such as Cherry Tree, are well used and close to effective operational capacity for both short and long stay parking. Whilst this

Study is not tasked with a detailed assessment of future parking, we have undertaken a broad brush assessment which suggests that significant new housing development in Dereham is likely to lead to future concerns over capacity levels. This may prompt DTC to keep under review the potential for car park charging in order to ensure that spaces are available for town centre shoppers and other visitors.

d. Public realm:

- Market Place is considered to have considerable scope for improvement including the following: ease of pedestrian movement, continued public transport accessibility, reducing the dominance of the private car, returning Market Place to a memorable centrepiece for the town centre, allowing the market to expand, and creating a place for events
- Therefore DTC should consider the promotion of a feasibility study to set a vision for Market Place and explore the viable options for improvement to the public realm in this important space in the town centre.

e. Non-Planning / Marketing Initiatives:

- For DTC to continue to provide financial support to specific events and initiatives and consider whether longer-term support is likely to benefit the town centre.
- Continue to explore opportunities to expand the existing market in Market Place via improvements to the public realm (as outlined above).
- Continue to consider expansion of the market to include a farmers market.
- Consider other opportunities to fund the promotion of the town centre, including a Business Improvement District.

f. Planning policy and the content of the Neighbourhood Plan:

- Highlight to BDC a potential error in the retail floorspace capacity forecasts in the draft Pre-Submission Publication Local Plan document.
- Highlight the need for the Policy D6 allocation from the SSPP DPD to be included in the new Local Plan main text.
- Whatever BDC decides to do regarding the Policy D6 allocation, DTC to include this potential redevelopment opportunity in the Neighbourhood Plan

and press BDC to take further preliminary preparatory work to assess the delivery of the site.

- DTC to consider reinforcing BDC's sequential test policies by emphasising the need for a 'town centre first' approach in Dereham and, as part of this, identifying additional retail/other main town centre use development opportunities such as Wrights Walk Phase 2 and also the contribution that vacant units in the town centre can make towards meeting identified needs.
- Objecting to the 1,000sq m retail impact assessment threshold in the Pre-Submission plan as it is not justified and will not protect the health of Dereham town centre. Allow include a section explaining the continuing threat of out of centre retailing to the health of the town centre, including the potential evolution of retail warehouse units from bulky to non-bulky comparison goods.
- In relation to the content of the Neighbourhood Plan consider including policies in relation to the safeguarding of car parking and a further policy for the determination of development and changes of use of property in Dereham town centre. In addition, include a series of statements (on parking, marketing, public realm and transport) to explain how the Town Council will support the vision in the Neighbourhood Plan.

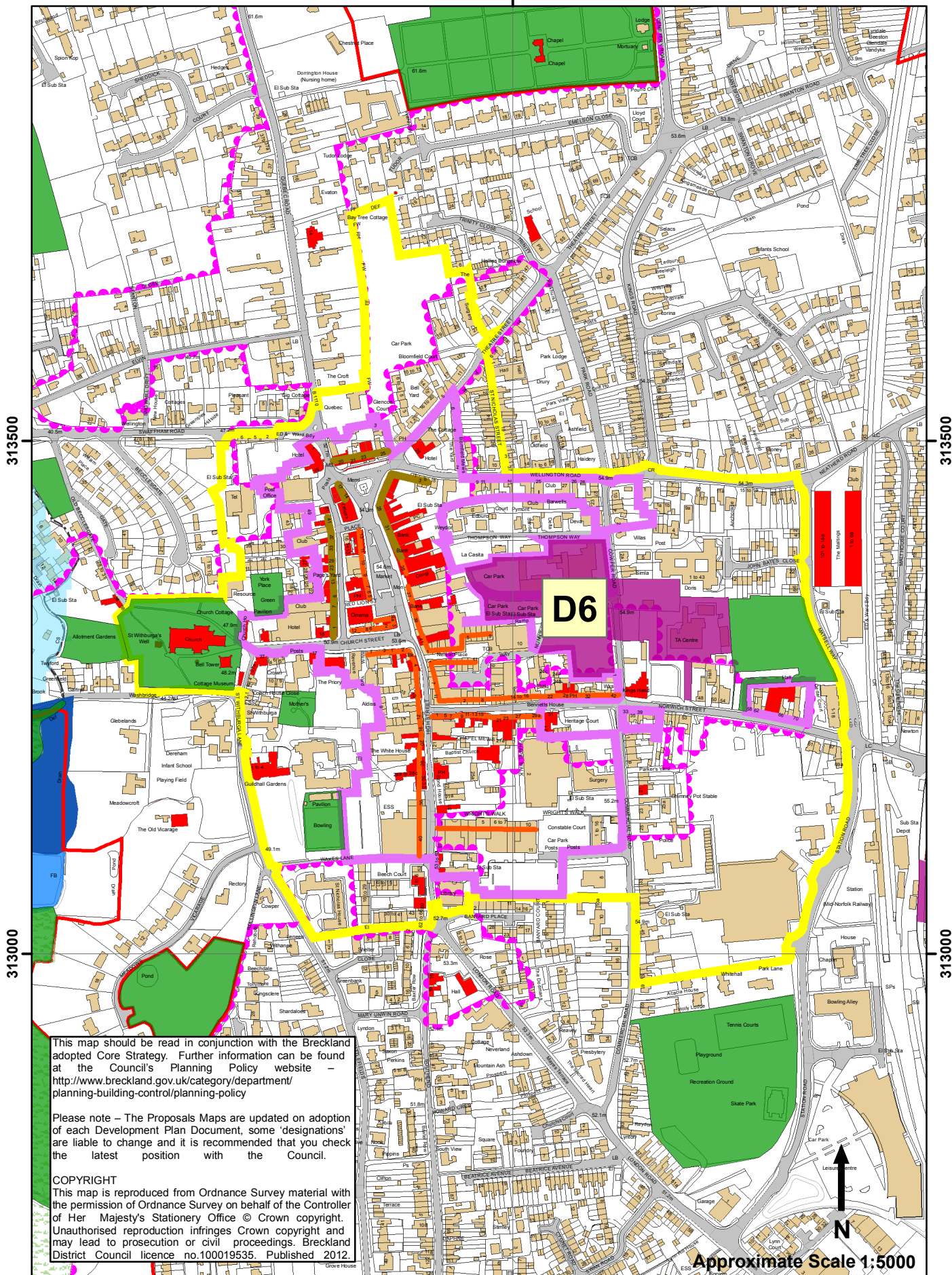


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Appendix I
Policy D6
Allocation

Dereham Town Centre Inset Proposals Map Adopted January 2012

599000



This map should be read in conjunction with the Breckland adopted Core Strategy. Further information can be found at the Council's Planning Policy website - <http://www.breckland.gov.uk/category/department/planning-building-control/planning-policy>

Please note - The Proposals Maps are updated on adoption of each Development Plan Document, some 'designations' are liable to change and it is recommended that you check the latest position with the Council.

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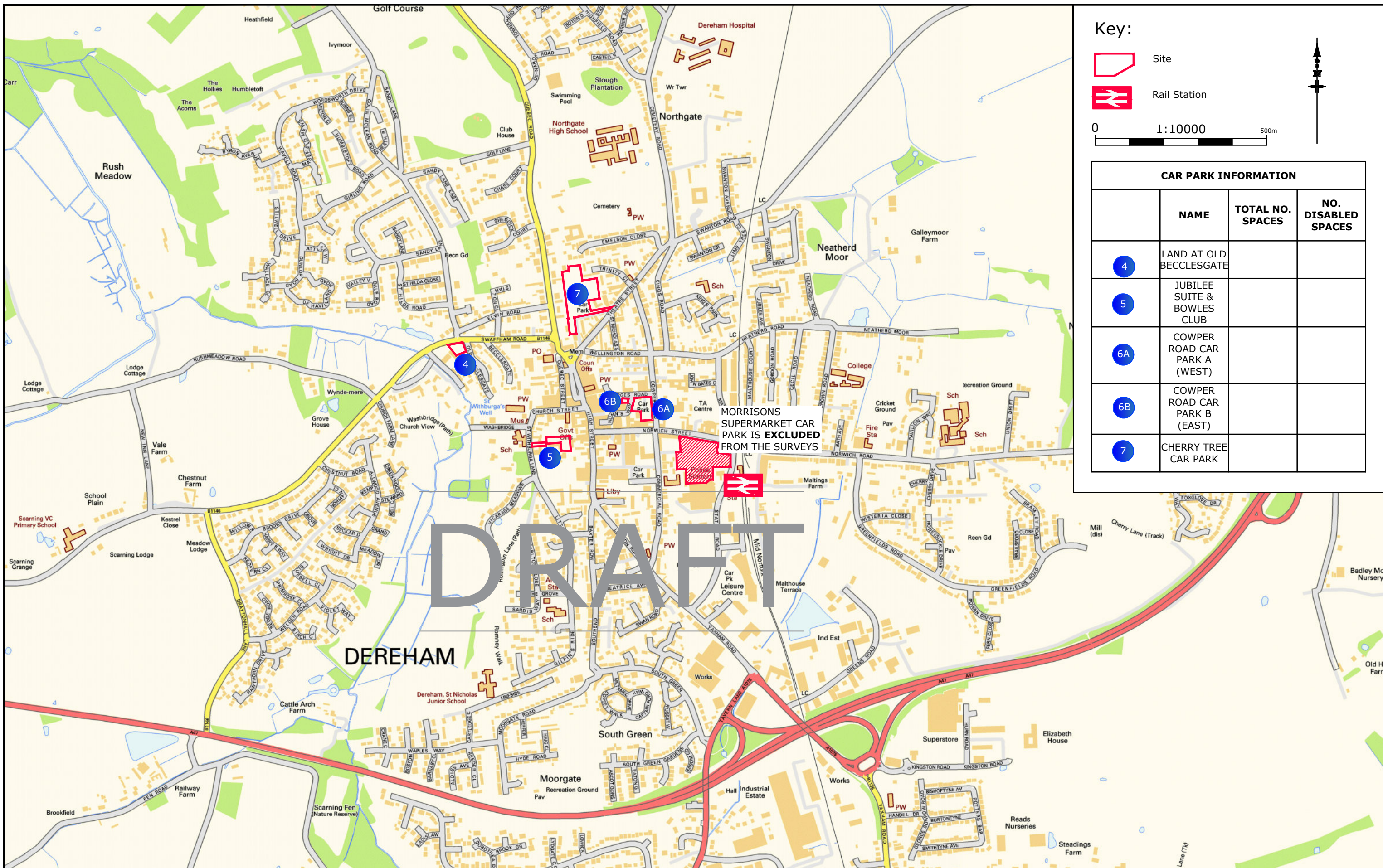
Approximate Scale 1:5000

599000



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Appendix II
2016 Dereham
Town Centre
Car Park
Surveys

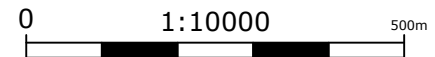


Key:



Site

Rail Station



CAR PARK INFORMATION

	NAME	TOTAL NO. SPACES	NO. DISABLED SPACES
4	LAND AT OLD BECCLESGATE		
5	JUBILEE SUITE & BOWLES CLUB		
6A	COWPER ROAD CAR PARK A (WEST)		
6B	COWPER ROAD CAR PARK B (EAST)		
7	CHERRY TREE CAR PARK		

DRAFT

MORRISONS SUPERMARKET CAR PARK IS EXCLUDED FROM THE SURVEYS

DEREHAM

MLM

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617548

DEREHAM CAR PARKS LOCATION PLAN



Key:



Site

Rail Station



CAR PARK INFORMATION

NO	NAME	TOTAL NO. SPACES	NO. DISABLED SPACES
1	QUEENS SQUARE	109	8
2	EDENSIDE	46	2
3	HORSE PIT	22	1
4	SWAFFHAM HILL	24	0
5	THE GUILDHALL	93	5
6A	COWPER ROAD	163	8
6B	COWPER ROAD		
7	CHEERY TREE	446	5
8	STATION STREET	26	0
9	THEATRE STREET	266	4
10	LYNN STREET	22	0
11	PEDLARS	20	0
12	MARKET PLACE	58	0
13	PIT LANE		0
14	ST NICHOLAS ST	38	0
15	LAND AT MINISTER GATE		
16	THE LINK	30	1
17	TANNER ST NORTH	54	2
18	TANNER ST SOUTH	68	3
19A	SCHOOL LANE(N)	77	2
19B	SCHOOL LANE(S)		
20	WHITE HART STREET	37	2
21	CAGE LANE	26	1
22	BURY ROAD	36	0
23	MARKET PLACE	21	2
24	PIKE LANE	85	5
25	ST GILES LANE (E)	39	3
26A	ST GILES LANE (W-A)	64	3
26B	ST GILES LANE (W-B)		

Swaffham Hill Car Park



0 1:500 25m

MLM

Multidisciplinary Consulting

190 Eureka Park, Upper Pemberton, Ashford, Kent TN25 4AZ
Tel: 01233 610530 Fax: 01233 618299
Website: www.mlm.uk.com

Drawing Status:

INFORMATION

Client

THE LAND GROUP

Project

BRECKLAND DISTRICT COUNCIL - CAR PARKING REVIEW

Drawing Title

CAR PARK NUMBER 4- DEREHAM

Drawn/Design

JW

Date

27/04/16

Scales

1:500 @ A3

Checked

LAB

Approved

LAB

Drawing No.

617548/SK04

Rev

A

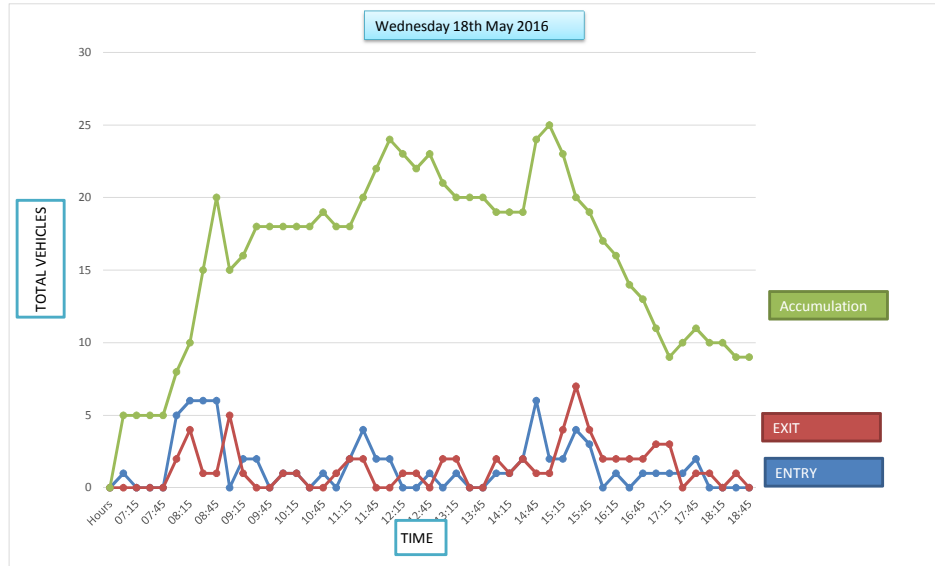
Rev	Date	Description	Made	Ckd
A	13.06.16	PHOTOGRAPHS ADDED	LRE	LAB

Car Park Accumulation

Car Park Number: 4
 Site: Swaffham Hill
 Location: Breckland District Council
 Date: Wednesday 18th May 2016
 Hours: 0700-1900

Cars parked at start	4
Total No of spaces	24
Cars parked at end	9

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	5	20
07:15	0	0	5	20
07:30	0	0	5	20
07:45	0	0	5	20
08:00	5	2	8	17
08:15	6	4	10	15
08:30	6	1	15	10
08:45	6	1	20	5
09:00	0	5	15	10
09:15	2	1	16	9
09:30	2	0	18	7
09:45	0	0	18	7
10:00	1	1	18	7
10:15	1	1	18	7
10:30	0	0	18	7
10:45	1	0	19	6
11:00	0	1	18	7
11:15	2	2	18	7
11:30	4	2	20	5
11:45	2	0	22	3
12:00	2	0	24	1
12:15	0	1	23	2
12:30	0	1	22	3
12:45	1	0	23	2
13:00	0	2	21	4
13:15	1	2	20	5
13:30	0	0	20	5
13:45	0	0	20	5
14:00	1	2	19	6
14:15	1	1	19	6
14:30	2	2	19	6
14:45	6	1	24	1
15:00	2	1	25	0
15:15	2	4	23	2
15:30	4	7	20	5
15:45	3	4	19	6
16:00	0	2	17	8
16:15	1	2	16	9
16:30	0	2	14	11
16:45	1	2	13	12
17:00	1	3	11	14
17:15	1	3	9	16
17:30	1	0	10	15
17:45	2	1	11	14
18:00	0	1	10	15
18:15	0	0	10	15
18:30	0	1	9	16
18:45	0	0	9	16

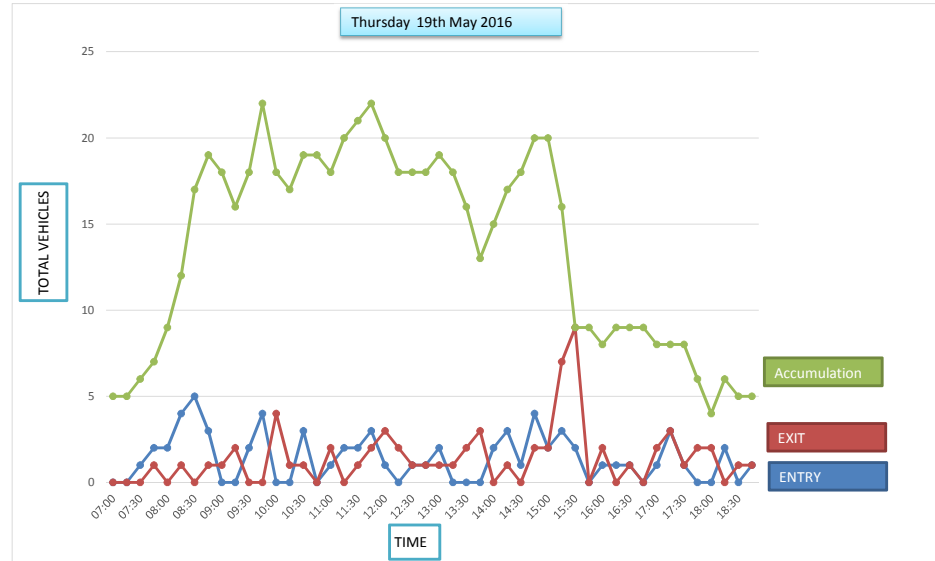


Car Park Accumulation

Car Park Number: 4
 Site: Swaffham Hill
 Location: Breckland District Council
 Date: Thursday 19th May 2016
 Hours: 0700-1900

Cars parked at start	5
Total No of spaces	24
Cars parked at end	5

Hours	Entry	Exit	Accumulation	Spaces available
07:00	0	0	5	19
07:15	0	0	5	19
07:30	1	0	6	18
07:45	2	1	7	17
08:00	2	0	9	15
08:15	4	1	12	12
08:30	5	0	17	7
08:45	3	1	19	5
09:00	0	1	18	6
09:15	0	2	16	8
09:30	2	0	18	6
09:45	4	0	22	2
10:00	0	4	18	6
10:15	0	1	17	7
10:30	3	1	19	5
10:45	0	0	19	5
11:00	1	2	18	6
11:15	2	0	20	4
11:30	2	1	21	3
11:45	3	2	22	2
12:00	1	3	20	4
12:15	0	2	18	6
12:30	1	1	18	6
12:45	1	1	18	6
13:00	2	1	19	5
13:15	0	1	18	6
13:30	0	2	16	8
13:45	0	3	13	11
14:00	2	0	15	9
14:15	3	1	17	7
14:30	1	0	18	6
14:45	4	2	20	4
15:00	2	2	20	4
15:15	3	7	16	8
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15:45	0	0	9	15
16:00	1	2	8	16
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16:30	1	1	9	15
16:45	0	0	9	15
17:00	1	2	8	16
17:15	3	3	8	16
17:30	1	1	8	16
17:45	0	2	6	18
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18:30	0	1	5	19
18:45	1	1	5	19

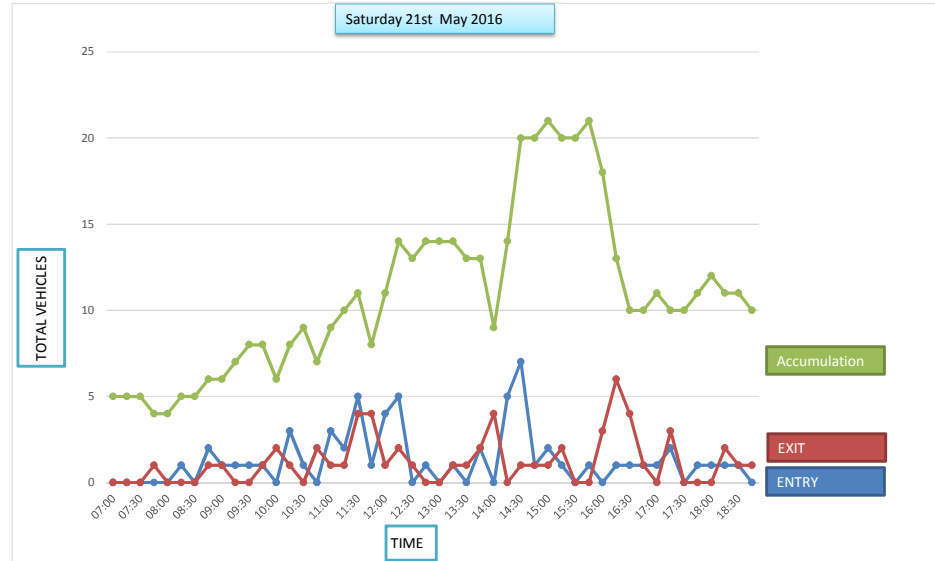


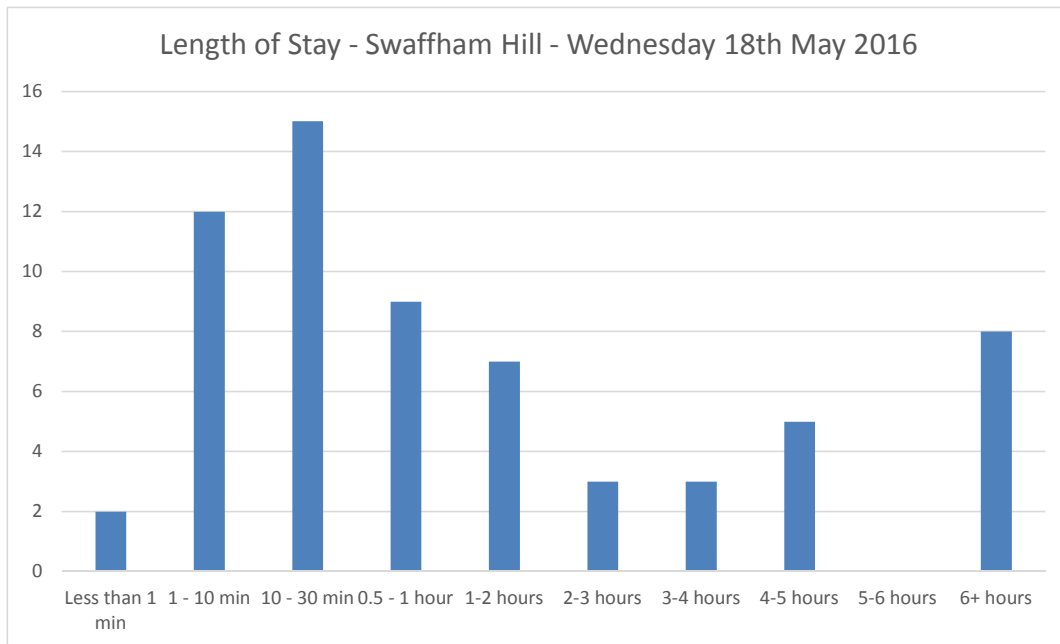
Car Park Accumulation

Car Park Number: 4
 Site: Swaffham Hill
 Location: Breckland District Council
 Date: Saturday 21st May 2016
 Hours: 0700-1900

Cars parked at start	5
Total No of spaces	24
Cars parked at end	10

Hours	Entry	Exit	Accumulation	Spaces available
07:00	0	0	5	19
07:15	0	0	5	19
07:30	0	0	5	19
07:45	0	1	4	20
08:00	0	0	4	20
08:15	1	0	5	19
08:30	0	0	5	19
08:45	2	1	6	18
09:00	1	1	6	18
09:15	1	0	7	17
09:30	1	0	8	16
09:45	1	1	8	16
10:00	0	2	6	18
10:15	3	1	8	16
10:30	1	0	9	15
10:45	0	2	7	17
11:00	3	1	9	15
11:15	2	1	10	14
11:30	5	4	11	13
11:45	1	4	8	16
12:00	4	1	11	13
12:15	5	2	14	10
12:30	0	1	13	11
12:45	1	0	14	10
13:00	0	0	14	10
13:15	1	1	14	10
13:30	0	1	13	11
13:45	2	2	13	11
14:00	0	4	9	15
14:15	5	0	14	10
14:30	7	1	20	4
14:45	1	1	20	4
15:00	2	1	21	3
15:15	1	2	20	4
15:30	0	0	20	4
15:45	1	0	21	3
16:00	0	3	18	6
16:15	1	6	13	11
16:30	1	4	10	14
16:45	1	1	10	14
17:00	1	0	11	13
17:15	2	3	10	14
17:30	0	0	10	14
17:45	1	0	11	13
18:00	1	0	12	12
18:15	1	2	11	13
18:30	1	1	11	13
18:45	0	1	10	14

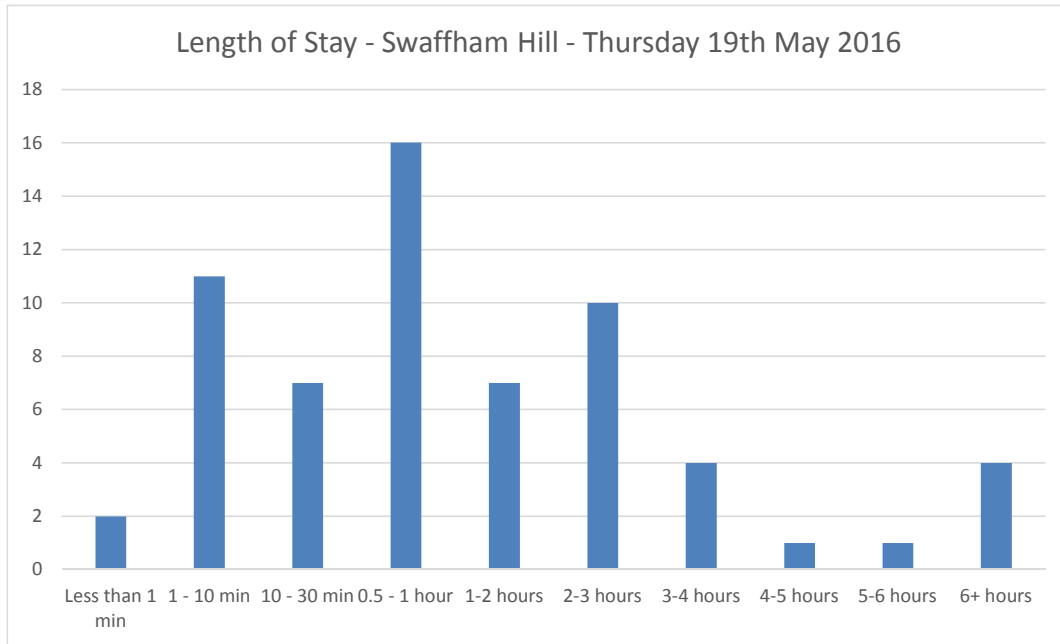




Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

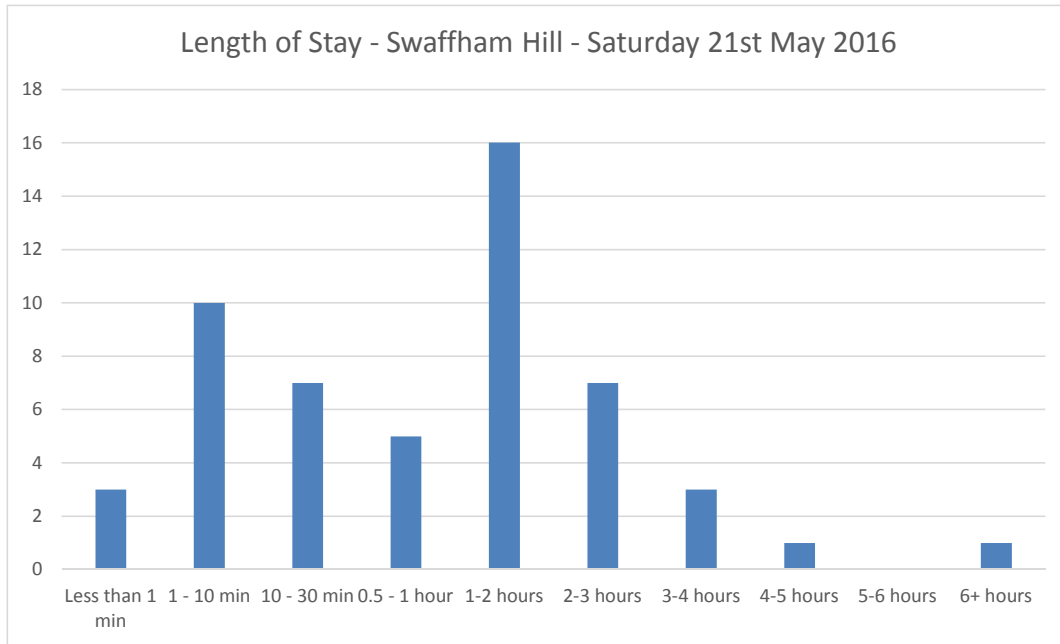
Parked at 7:00 and leave during the day:	2	
Arrive during the survey however parked at 19:00:	7	0
Vehicles not moved during survey:	2	7



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

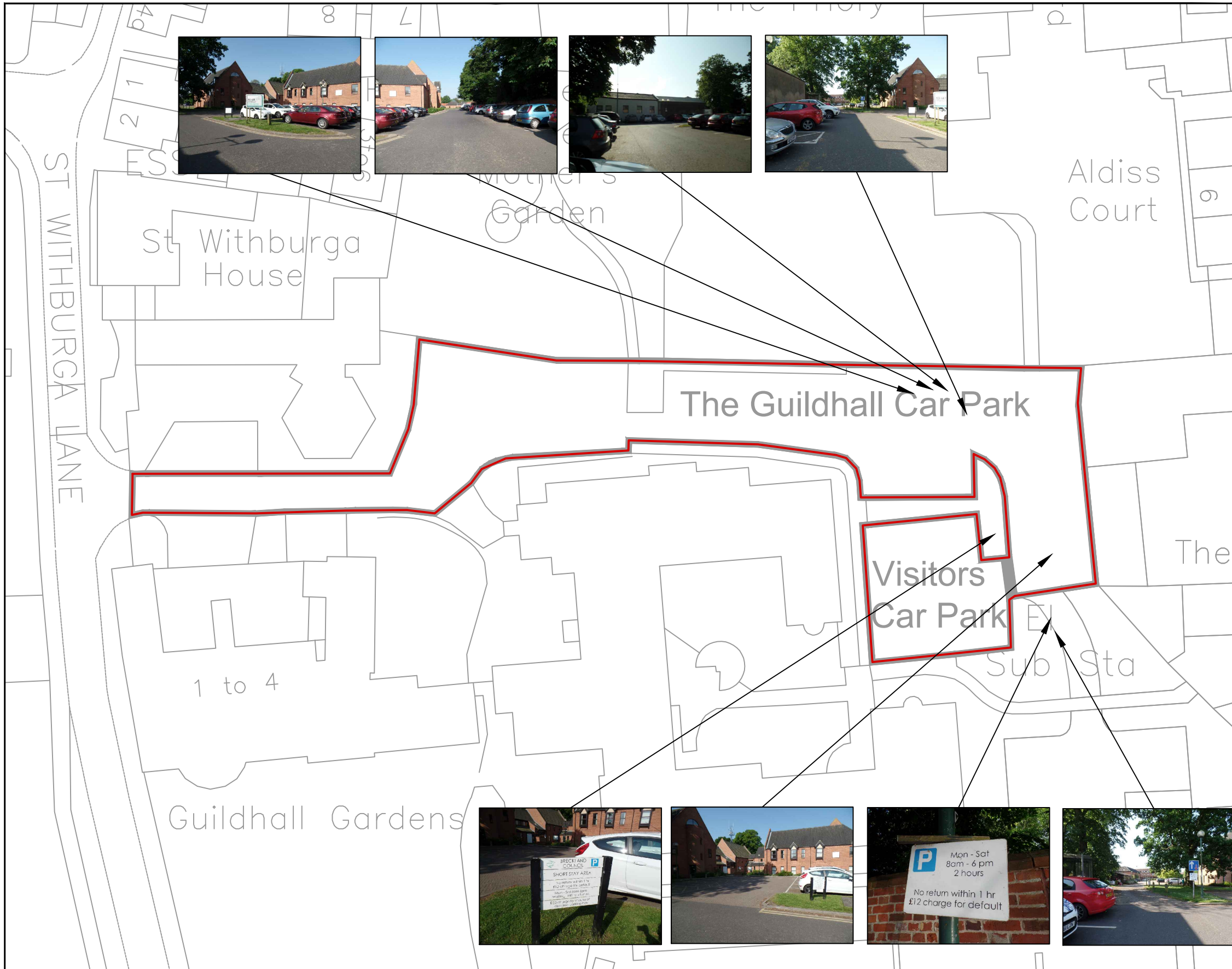
Parked at 7:00 and leave during the day:	4	
Arrive during the survey however parked at 19:00:	4	1
Vehicles not moved during survey:	1	3



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	4	
Arrive during the survey however parked at 19:00:	9	1
Vehicles not moved during survey:	1	8



Key:

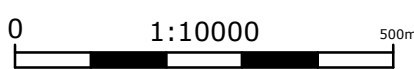


Site
Rail Station



CAR PARK INFORMATION			
NO	NAME	TOTAL NO. SPACES	NO. DISABLED SPACES
1	QUEENS SQUARE	109	8
2	EDENSIDE	46	2
3	HORSE PIT	22	1
4	SWAFFHAM HILL	24	0
5	THE GUILDHALL	93	5
6A	COWPER ROAD	163	8
6B	COWPER ROAD		
7	CHEERY TREE	446	5
8	STATION STREET	26	0
9	THEATRE STREET	266	4
10	LYNN STREET	22	0
11	PEDLARS	20	0
12	MARKET PLACE	58	0
13	PIT LANE		0
14	ST NICHOLAS ST	38	0
15	LAND AT MINISTER GATE		
16	THE LINK	30	1
17	TANNER ST NORTH	54	2
18	TANNER ST SOUTH	68	3
19A	SCHOOL LANE(N)	77	2
19B	SCHOOL LANE(S)		
20	WHITE HART STREET	37	2
21	CAGE LANE	26	1
22	BURY ROAD	36	0
23	MARKET PLACE	21	2
24	PIKE LANE	85	5
25	ST GILES LANE (E)	39	3
26A	ST GILES LANE (W-A)	64	3
26B	ST GILES LANE (W-B)		

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Multidisciplinary Consulting

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Drawing Status: **INFORMATION**

Client: **THE LAND GROUP**

Project: **BRECKLAND DISTRICT COUNCIL - CAR PARKING REVIEW**

Drawing Title: **CAR PARK NUMBER 5- DEREHAM**

Drawn/Design	JW	Date	27/04/16	Scales	1:1000 @ A3
Checked	LAB	Approved	LAB		

Drawing No. **617548/SK05** Rev **A**

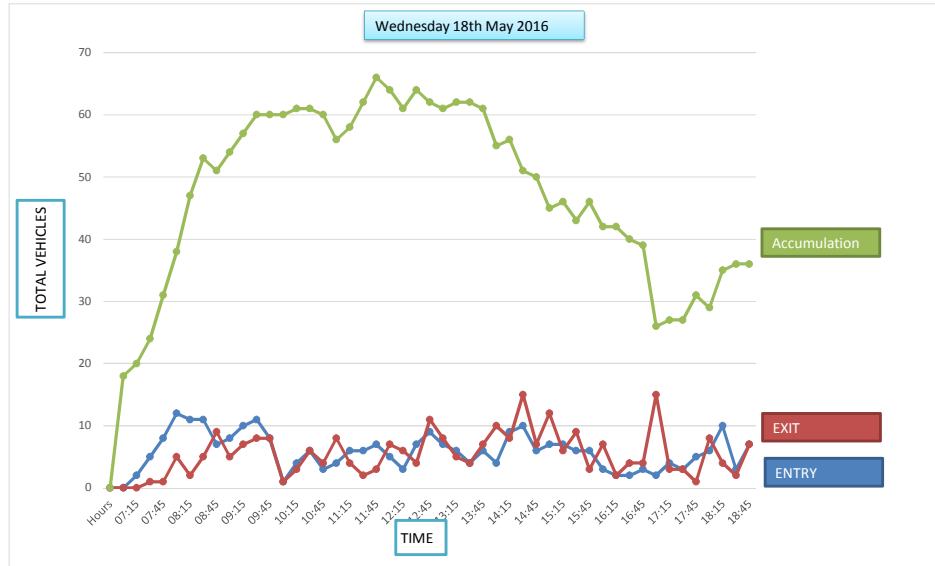
Rev	Date	Description	Made	Ckd
A	13.06.16	PHOTOGRAPHS ADDED	LRE	LAB

Car Park Accumulation

Car Park Number: 5
 Site: The Guildhall
 Location: Breckland District Council
 Date: Wednesday 18th May 2016
 Hours: 0700-1900

Cars parked at start	18
Total No of spaces	93
Cars parked at end	36

Hours	Entry	Exit	Accumulation	Spaces available
07:00	0	0	18	75
07:15	2	0	20	73
07:30	5	1	24	69
07:45	8	1	31	62
08:00	12	5	38	55
08:15	11	2	47	46
08:30	11	5	53	40
08:45	7	9	51	42
09:00	8	5	54	39
09:15	10	7	57	36
09:30	11	8	60	33
09:45	8	8	60	33
10:00	1	1	60	33
10:15	4	3	61	32
10:30	6	6	61	32
10:45	3	4	60	33
11:00	4	8	56	37
11:15	6	4	58	35
11:30	6	2	62	31
11:45	7	3	66	27
12:00	5	7	64	29
12:15	3	6	61	32
12:30	7	4	64	29
12:45	9	11	62	31
13:00	7	8	61	32
13:15	6	5	62	31
13:30	4	4	62	31
13:45	6	7	61	32
14:00	4	10	55	38
14:15	9	8	56	37
14:30	10	15	51	42
14:45	6	7	50	43
15:00	7	12	45	48
15:15	7	6	46	47
15:30	6	9	43	50
15:45	6	3	46	47
16:00	3	7	42	51
16:15	2	2	42	51
16:30	2	4	40	53
16:45	3	4	39	54
17:00	2	15	26	67
17:15	4	3	27	66
17:30	3	3	27	66
17:45	5	1	31	62
18:00	6	8	29	64
18:15	10	4	35	58
18:30	3	2	36	57
18:45	7	7	36	57

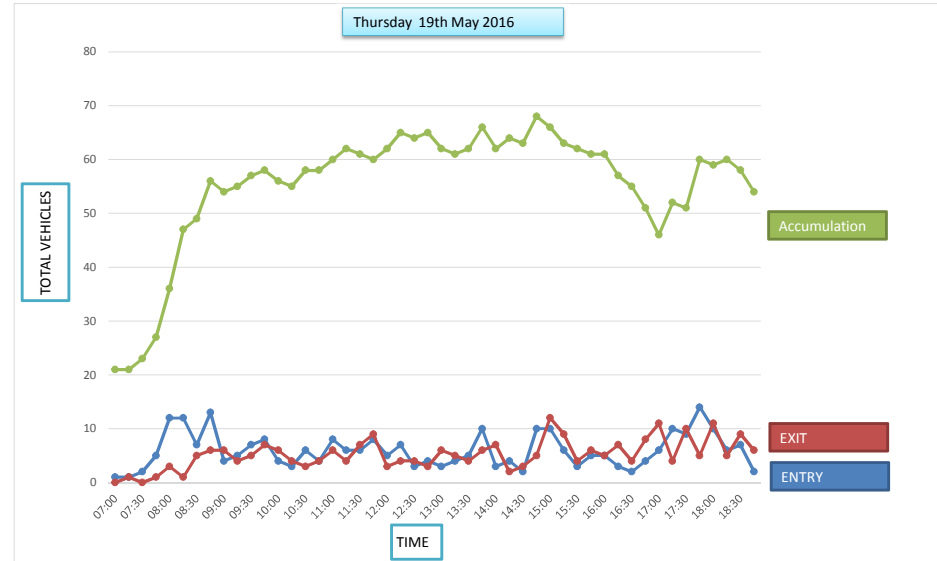


Car Park Accumulation

Car Park Number: 5
 Site: The Guildhall
 Location: Breckland District Council
 Date: Thursday 19th May 2015
 Hours: 0700-1900

Cars parked at start	21
Total No of spaces	93
Cars parked at end	54

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	21	72
07:15	1	1	21	72
07:30	2	0	23	70
07:45	5	1	27	66
08:00	12	3	36	57
08:15	12	1	47	46
08:30	7	5	49	44
08:45	13	6	56	37
09:00	4	6	54	39
09:15	5	4	55	38
09:30	7	5	57	36
09:45	8	7	58	35
10:00	4	6	56	37
10:15	3	4	55	38
10:30	6	3	58	35
10:45	4	4	58	35
11:00	8	6	60	33
11:15	6	4	62	31
11:30	6	7	61	32
11:45	8	9	60	33
12:00	5	3	62	31
12:15	7	4	65	28
12:30	3	4	64	29
12:45	4	3	65	28
13:00	3	6	62	31
13:15	4	5	61	32
13:30	5	4	62	31
13:45	10	6	66	27
14:00	3	7	62	31
14:15	4	2	64	29
14:30	2	3	63	30
14:45	10	5	68	25
15:00	10	12	66	27
15:15	6	9	63	30
15:30	3	4	62	31
15:45	5	6	61	32
16:00	5	5	61	32
16:15	3	7	57	36
16:30	2	4	55	38
16:45	4	8	51	42
17:00	6	11	46	47
17:15	10	4	52	41
17:30	9	10	51	42
17:45	14	5	60	33
18:00	10	11	59	34
18:15	6	5	60	33
18:30	7	9	58	35
18:45	2	6	54	39
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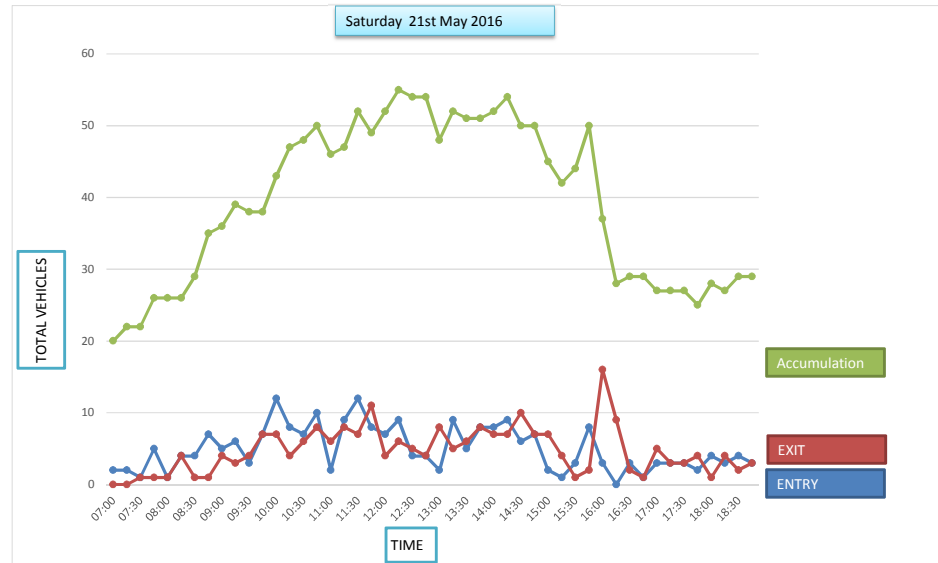


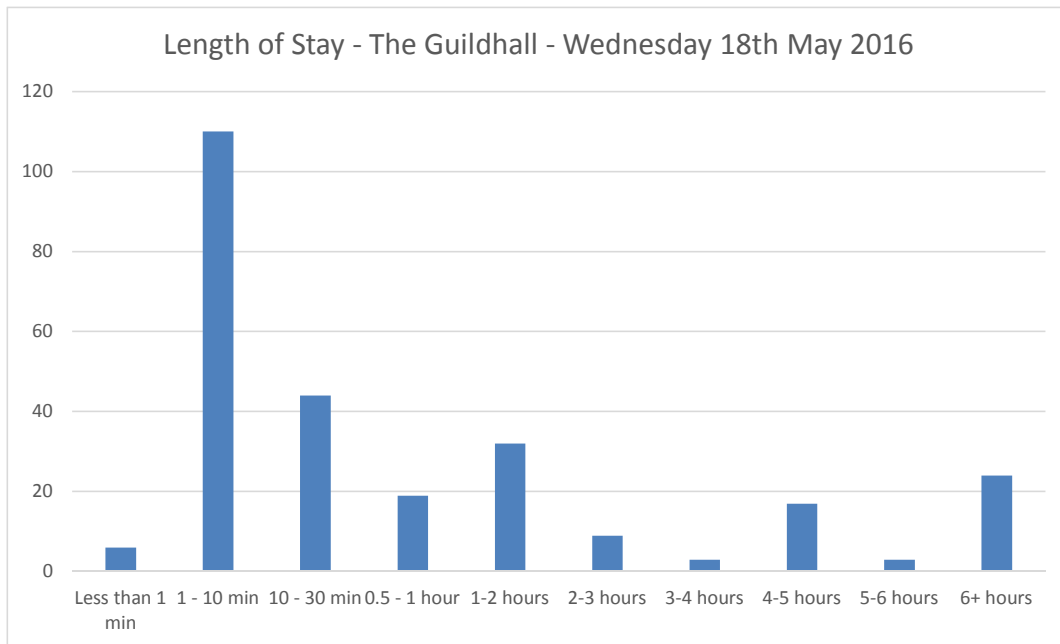
Car Park Accumulation

Car Park Number: 5
 Site: The Guildhall
 Location: Breckland District Council
 Date: Saturday 21st May 2016
 Hours: 0700-1900

Cars parked at start	18
Total No of spaces	93
Cars parked at end	29

Hours	Entry	Exit	Accumulation	Spaces available
07:00	2	0	20	75
07:15	2	0	22	73
07:30	1	1	22	73
07:45	5	1	26	69
08:00	1	1	26	69
08:15	4	4	26	69
08:30	4	1	29	66
08:45	7	1	35	60
09:00	5	4	36	59
09:15	6	3	39	56
09:30	3	4	38	57
09:45	7	7	38	57
10:00	12	7	43	52
10:15	8	4	47	48
10:30	7	6	48	47
10:45	10	8	50	45
11:00	2	6	46	49
11:15	9	8	47	48
11:30	12	7	52	43
11:45	8	11	49	46
12:00	7	4	52	43
12:15	9	6	55	40
12:30	4	5	54	41
12:45	4	4	54	41
13:00	2	8	48	47
13:15	9	5	52	43
13:30	5	6	51	44
13:45	8	8	51	44
14:00	8	7	52	43
14:15	9	7	54	41
14:30	6	10	50	45
14:45	7	7	50	45
15:00	2	7	45	50
15:15	1	4	42	53
15:30	3	1	44	51
15:45	8	2	50	45
16:00	3	16	37	58
16:15	0	9	28	67
16:30	3	2	29	66
16:45	1	1	29	66
17:00	3	5	27	68
17:15	3	3	27	68
17:30	3	3	27	68
17:45	2	4	25	70
18:00	4	1	28	67
18:15	3	4	27	68
18:30	4	2	29	66
18:45	3	3	29	66

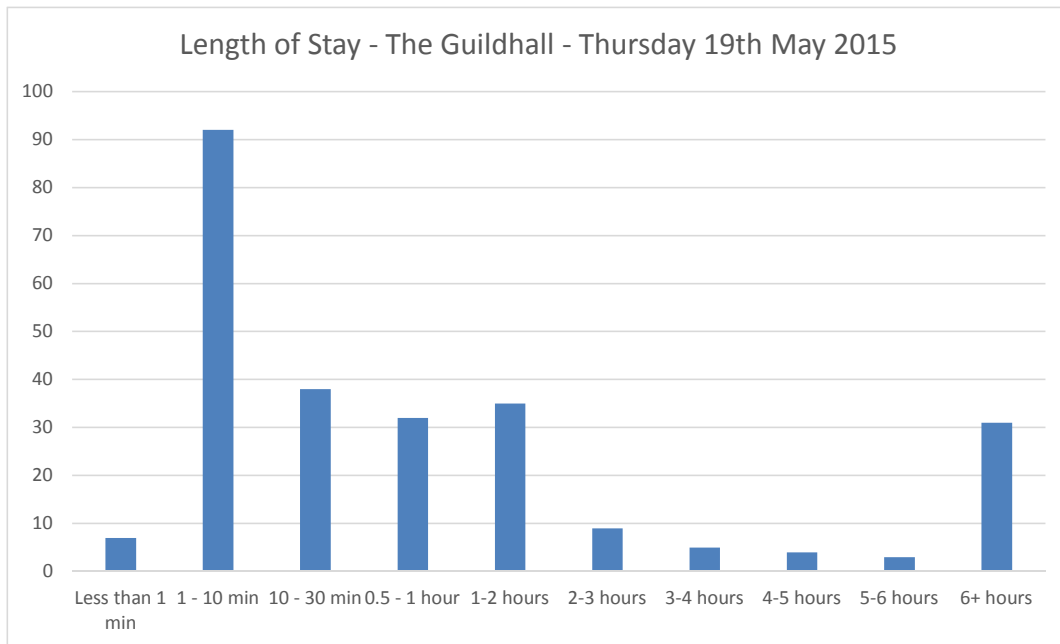




Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

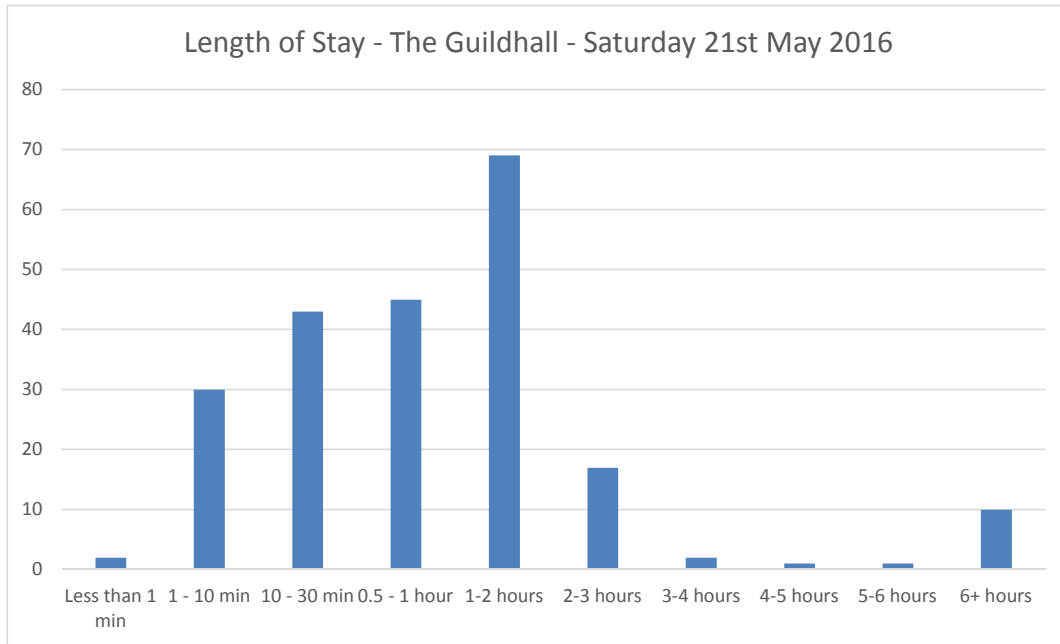
Parked at 7:00 and leave during the day:	11	
Arrive during the survey however parked at 19:00:	25	20
Vehicles not moved during survey:	7	5



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	13	
Arrive during the survey however parked at 19:00:	31	16
Vehicles not moved during survey:	8	15



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	8	
Arrive during the survey however parked at 19:00:	19	9
Vehicles not moved during survey:	10	10



Key:



Site



Rail Station



CAR PARK INFORMATION

NO	NAME	TOTAL NO. SPACES	NO. DISABLED SPACES
1	QUEENS SQUARE	109	8
2	EDENSIDE	46	2
3	HORSE PIT	22	1
4	SWAFFHAM HILL	24	0
5	THE GUILDHALL	93	5
6A	COWPER ROAD	163	8
6B	COWPER ROAD		
7	CHEERY TREE	446	5
8	STATION STREET	26	0
9	THEATRE STREET	266	4
10	LYNN STREET	22	0
11	PEDLARS	20	0
12	MARKET PLACE	58	0
13	PIT LANE		0
14	ST NICHOLAS ST	38	0
15	LAND AT MINISTER GATE		
16	THE LINK	30	1
17	TANNER ST NORTH	54	2
18	TANNER ST SOUTH	68	3
19A	SCHOOL LANE(N)	77	2
19B	SCHOOL LANE (S)		
20	WHITE HART STREET	37	2
21	CAGE LANE	26	1
22	BURY ROAD	36	0
23	MARKET PLACE	21	2
24	PIKE LANE	85	5
25	ST GILES LANE (E)	39	3
26A	ST GILES LANE (W-A)	64	3
26B	ST GILES LANE (W-B)		



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Drawing Status:

INFORMATION

Drawing Title

CAR PARK NUMBER 6A & 6B- DEREHAM

Client

THE LAND GROUP

Drawn/Design

JW

Date

27/04/16

Scales

1:500 @ A3

Checked

LAB

Approved

LAB

Project

BRECKLAND DISTRICT COUNCIL - CAR PARKING REVIEW

Drawing No.

617548/SK06

Rev

A

0 1:500 25m

MLM

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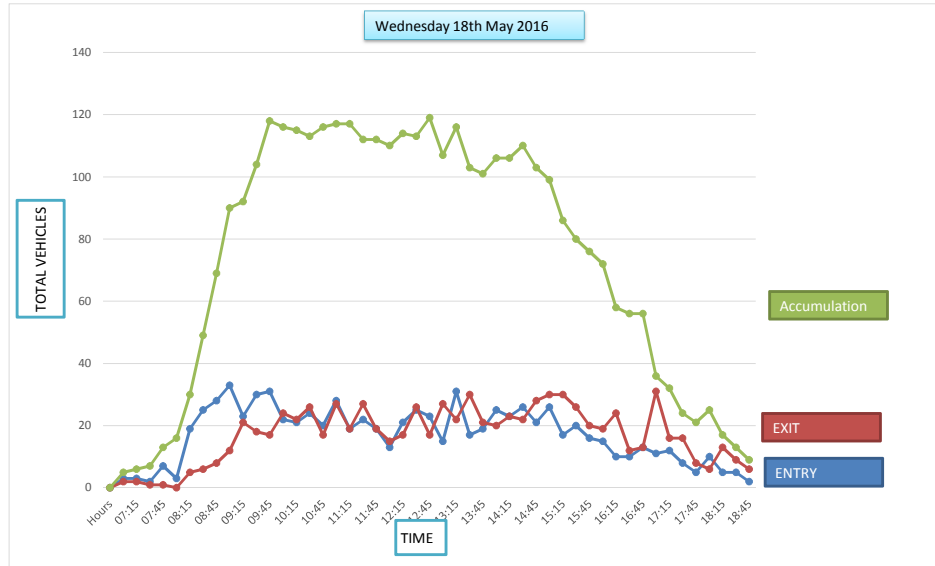
Rev	Date	Description	Made	Ckd
A	13.06.16	PHOTOGRAPHS ADDED	LRE	LAB

Car Park Accumulation

Car Park Number: 6A
 Site: Cowper Road
 Location: Breckland District Council
 Date: Wednesday 18th May 2016
 Hours: 0700-1900

Cars parked at start	4
Total No of spaces	144
Cars parked at end	9

Hours	Entry	Exit	Accumulation	Spaces available
07:00	3	2	5	140
07:15	3	2	6	139
07:30	2	1	7	138
07:45	7	1	13	132
08:00	3	0	16	129
08:15	19	5	30	115
08:30	25	6	49	96
08:45	28	8	69	76
09:00	33	12	90	55
09:15	23	21	92	53
09:30	30	18	104	41
09:45	31	17	118	27
10:00	22	24	116	29
10:15	21	22	115	30
10:30	24	26	113	32
10:45	20	17	116	29
11:00	28	27	117	28
11:15	19	19	117	28
11:30	22	27	112	33
11:45	19	19	112	33
12:00	13	15	110	35
12:15	21	17	114	31
12:30	25	26	113	32
12:45	23	17	119	26
13:00	15	27	107	38
13:15	31	22	116	29
13:30	17	30	103	42
13:45	19	21	101	44
14:00	25	20	106	39
14:15	23	23	106	39
14:30	26	22	110	35
14:45	21	28	103	42
15:00	26	30	99	46
15:15	17	30	86	59
15:30	20	26	80	65
15:45	16	20	76	69
16:00	15	19	72	73
16:15	10	24	58	87
16:30	10	12	56	89
16:45	13	13	56	89
17:00	11	31	36	109
17:15	12	16	32	113
17:30	8	16	24	121
17:45	5	8	21	124
18:00	10	6	25	120
18:15	5	13	17	128
18:30	5	9	13	132
18:45	2	6	9	136



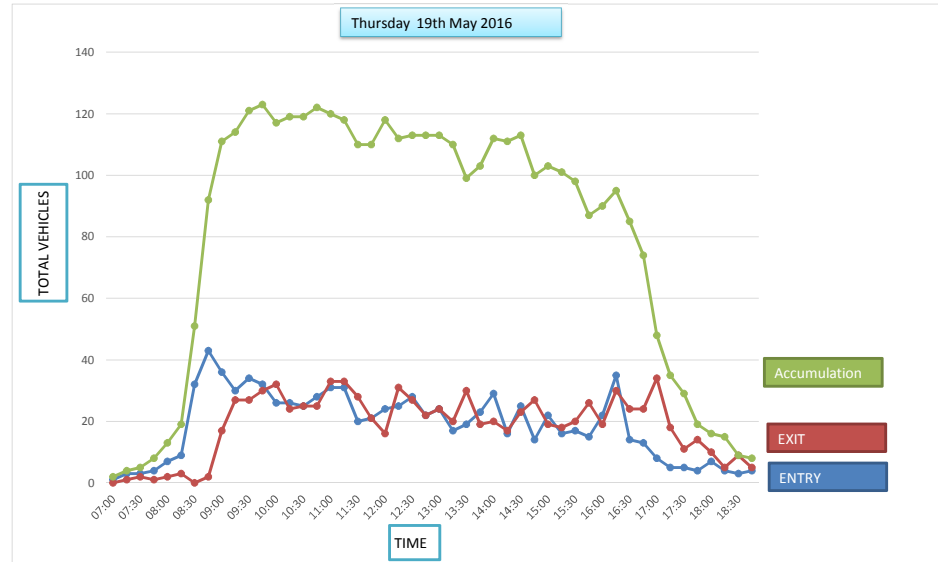
826 821

Car Park Accumulation

Car Park Number: 6A
 Site: Cowper Road
 Location: Breckland District Council
 Date: Thursday 19th May 2015
 Hours: 0700-1900

Cars parked at start	1
Total No of spaces	144
Cars parked at end	8

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	2	143
07:15	3	1	4	141
07:30	3	2	5	140
07:45	4	1	8	137
08:00	7	2	13	132
08:15	9	3	19	126
08:30	32	0	51	94
08:45	43	2	92	53
09:00	36	17	111	34
09:15	30	27	114	31
09:30	34	27	121	24
09:45	32	30	123	22
10:00	26	32	117	28
10:15	26	24	119	26
10:30	25	25	119	26
10:45	28	25	122	23
11:00	31	33	120	25
11:15	31	33	118	27
11:30	20	28	110	35
11:45	21	21	110	35
12:00	24	16	118	27
12:15	25	31	112	33
12:30	28	27	113	32
12:45	22	22	113	32
13:00	24	24	113	32
13:15	17	20	110	35
13:30	19	30	99	46
13:45	23	19	103	42
14:00	29	20	112	33
14:15	16	17	111	34
14:30	25	23	113	32
14:45	14	27	100	45
15:00	22	19	103	42
15:15	16	18	101	44
15:30	17	20	98	47
15:45	15	26	87	58
16:00	22	19	90	55
16:15	35	30	95	50
16:30	14	24	85	60
16:45	13	24	74	71
17:00	8	34	48	97
17:15	5	18	35	110
17:30	5	11	29	116
17:45	4	14	19	126
18:00	7	10	16	129
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18:30	3	9	9	136
18:45	4	5	8	137
902	895			

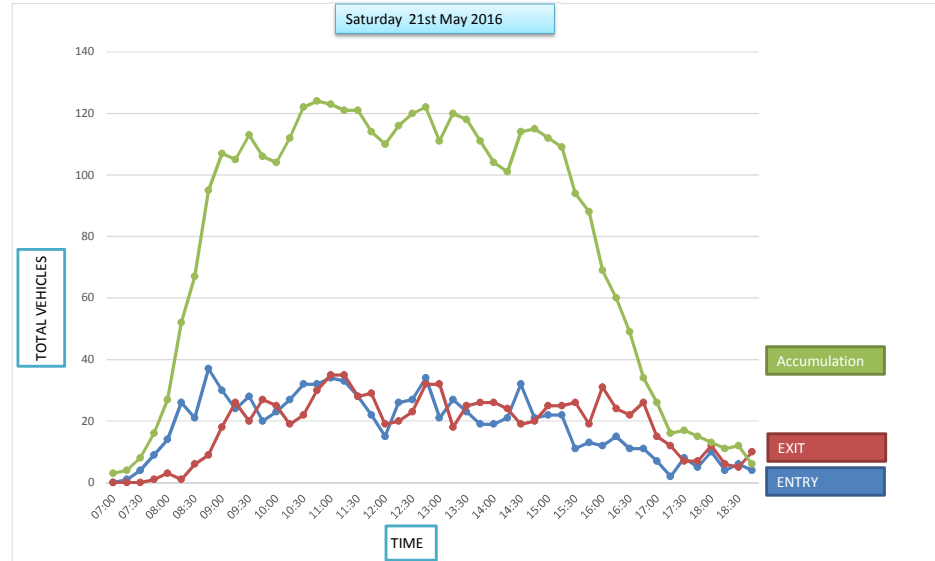


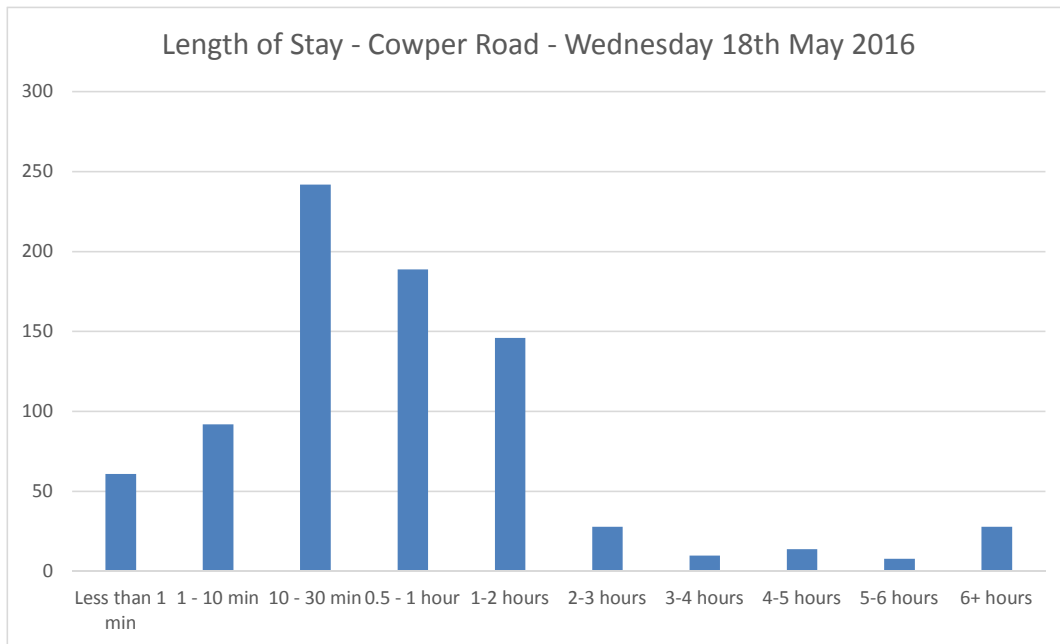
Car Park Accumulation

Car Park Number: 6A
 Site: Cowper Road
 Location: Breckland District Council
 Date: Saturday 21st May 2016
 Hours: 0700-1900

Cars parked at start	3
Total No of spaces	144
Cars parked at end	6

Hours	Entry	Exit	Accumulation	Spaces available
07:00	0	0	3	141
07:15	1	0	4	140
07:30	4	0	8	136
07:45	9	1	16	128
08:00	14	3	27	117
08:15	26	1	52	92
08:30	21	6	67	77
08:45	37	9	95	49
09:00	30	18	107	37
09:15	24	26	105	39
09:30	28	20	113	31
09:45	20	27	106	38
10:00	23	25	104	40
10:15	27	19	112	32
10:30	32	22	122	22
10:45	32	30	124	20
11:00	34	35	123	21
11:15	33	35	121	23
11:30	28	28	121	23
11:45	22	29	114	30
12:00	15	19	110	34
12:15	26	20	116	28
12:30	27	23	120	24
12:45	34	32	122	22
13:00	21	32	111	33
13:15	27	18	120	24
13:30	23	25	118	26
13:45	19	26	111	33
14:00	19	26	104	40
14:15	21	24	101	43
14:30	32	19	114	30
14:45	21	20	115	29
15:00	22	25	112	32
15:15	22	25	109	35
15:30	11	26	94	50
15:45	13	19	88	56
16:00	12	31	69	75
16:15	15	24	60	84
16:30	11	22	49	95
16:45	11	26	34	110
17:00	7	15	26	118
17:15	2	12	16	128
17:30	8	7	17	127
17:45	5	7	15	129
18:00	10	12	13	131
18:15	4	6	11	133
18:30	6	5	12	132
18:45	4	10	6	138

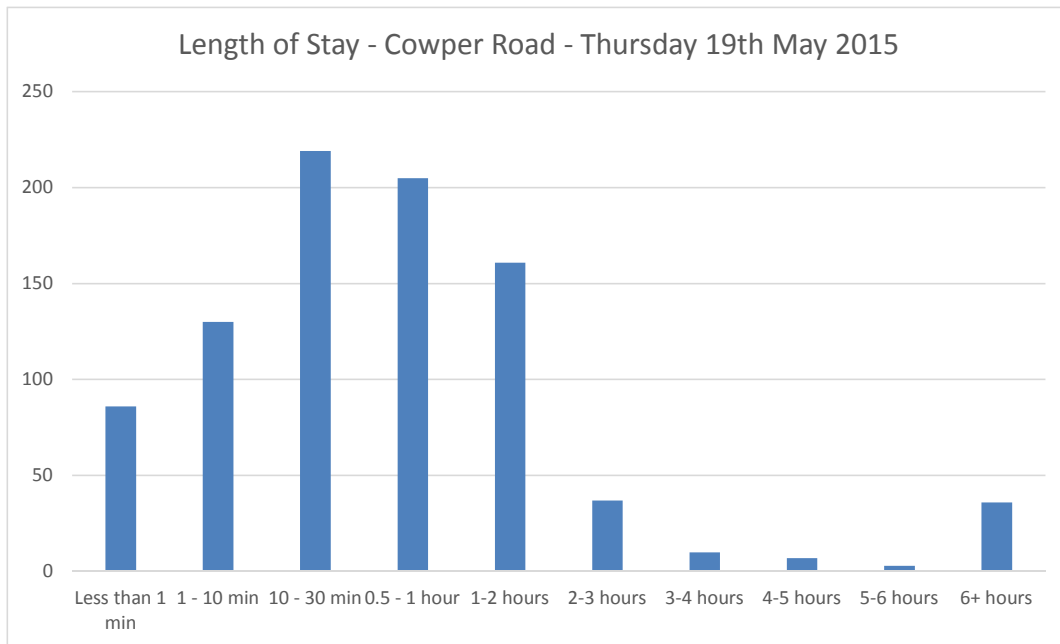




Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

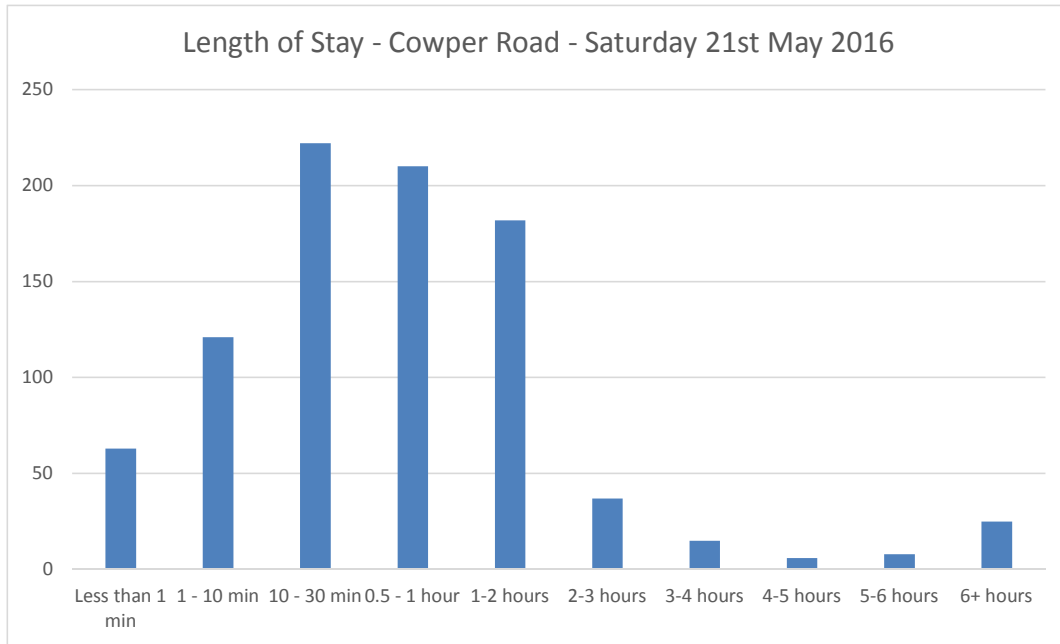
Parked at 7:00 and leave during the day:	3	
Arrive during the survey however parked at 19:00:	8	4
Vehicles not moved during survey:	1	4



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	1	
Arrive during the survey however parked at 19:00:	8	5
Vehicles not moved during survey:	0	3



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

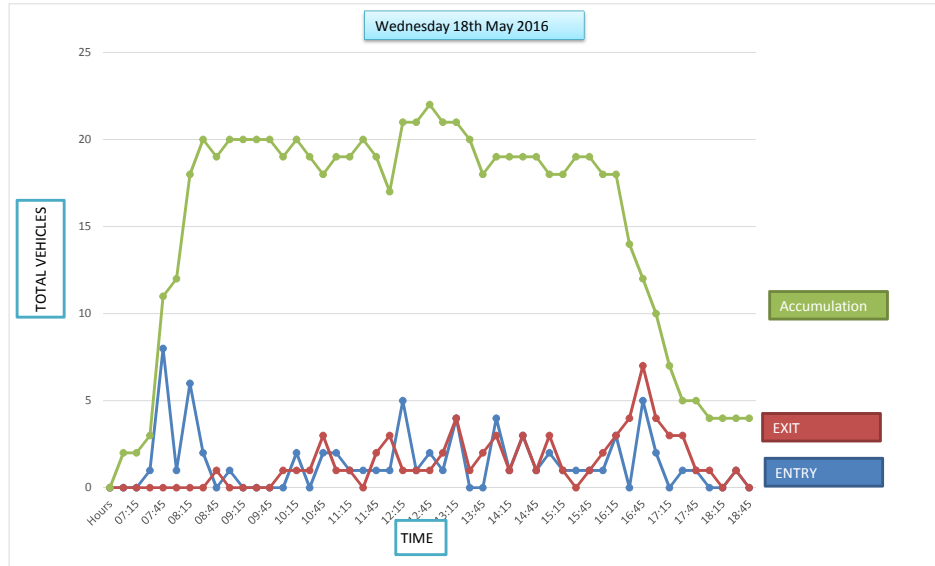
Parked at 7:00 and leave during the day:	1	
Arrive during the survey however parked at 19:00:	4	3
Vehicles not moved during survey:	2	1

Car Park Accumulation

Car Park Number: 6B
 Site: Cowper Road
 Location: Breckland District Council
 Date: Wednesday 18/05/2016
 Hours: 0700-1900

Cars parked at start	2
Total No of spaces	19
Cars parked at end	4

Hours	Entry	Exit	Accumulation	Spaces available
07:00	0	0	2	17
07:15	0	0	2	17
07:30	1	0	3	16
07:45	8	0	11	8
08:00	1	0	12	7
08:15	6	0	18	1
08:30	2	0	20	-1
08:45	0	1	19	0
09:00	1	0	20	-1
09:15	0	0	20	-1
09:30	0	0	20	-1
09:45	0	0	20	-1
10:00	0	1	19	0
10:15	2	1	20	-1
10:30	0	1	19	0
10:45	2	3	18	1
11:00	2	1	19	0
11:15	1	1	19	0
11:30	1	0	20	-1
11:45	1	2	19	0
12:00	1	3	17	2
12:15	5	1	21	-2
12:30	1	1	21	-2
12:45	2	1	22	-3
13:00	1	2	21	-2
13:15	4	4	21	-2
13:30	0	1	20	-1
13:45	0	2	18	1
14:00	4	3	19	0
14:15	1	1	19	0
14:30	3	3	19	0
14:45	1	1	19	0
15:00	2	3	18	1
15:15	1	1	18	1
15:30	1	0	19	1
15:45	1	1	19	0
16:00	1	2	18	1
16:15	3	3	18	1
16:30	0	4	14	5
16:45	5	7	12	7
17:00	2	4	10	9
17:15	0	3	7	12
17:30	1	3	5	14
17:45	1	1	5	14
18:00	0	1	4	15
18:15	0	0	4	15
18:30	1	1	4	15
18:45	0	0	4	15

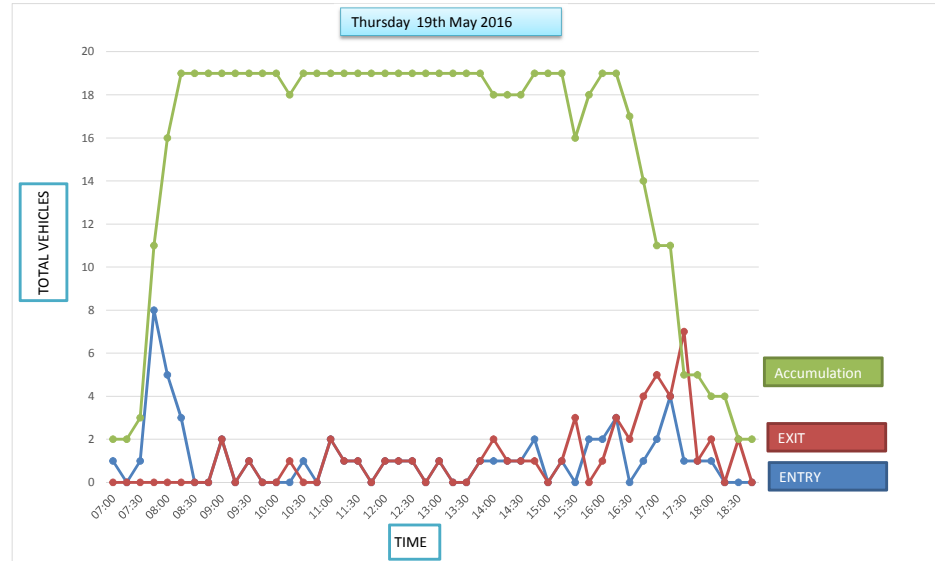


Car Park Accumulation

Car Park Number: 6B
 Site: Cowper Road
 Location: Breckland District Council
 Date: Thursday 19/05/2016
 Hours: 0700-1900

Cars parked at start	1
Total No of spaces	19
Cars parked at end	2

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	2	18
07:15	0	0	2	18
07:30	1	0	3	17
07:45	8	0	11	9
08:00	5	0	16	4
08:15	3	0	19	1
08:30	0	0	19	1
08:45	0	0	19	1
09:00	2	2	19	1
09:15	0	0	19	1
09:30	1	1	19	1
09:45	0	0	19	1
10:00	0	0	19	1
10:15	0	1	18	2
10:30	1	0	19	1
10:45	0	0	19	1
11:00	2	2	19	1
11:15	1	1	19	1
11:30	1	1	19	1
11:45	0	0	19	1
12:00	1	1	19	1
12:15	1	1	19	1
12:30	1	1	19	1
12:45	0	0	19	1
13:00	1	1	19	1
13:15	0	0	19	1
13:30	0	0	19	1
13:45	1	1	19	1
14:00	1	2	18	2
14:15	1	1	18	2
14:30	1	1	18	2
14:45	2	1	19	1
15:00	0	0	19	1
15:15	1	1	19	1
15:30	0	3	16	4
15:45	2	0	18	2
16:00	2	1	19	1
16:15	3	3	19	1
16:30	0	2	17	3
16:45	1	4	14	6
17:00	2	5	11	9
17:15	4	4	11	9
17:30	1	7	5	15
17:45	1	1	5	15
18:00	1	2	4	16
18:15	0	0	4	16
18:30	0	2	2	18
18:45	0	0	2	18

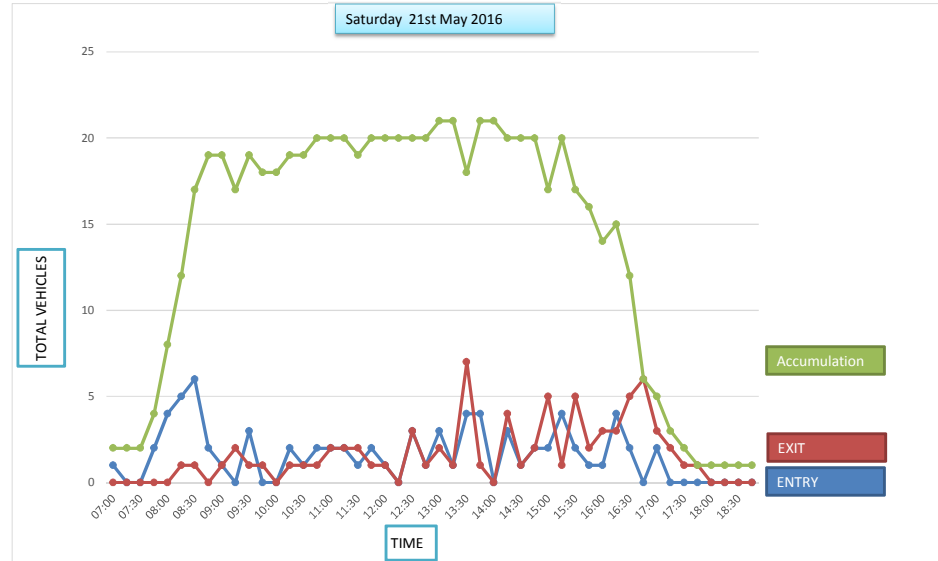


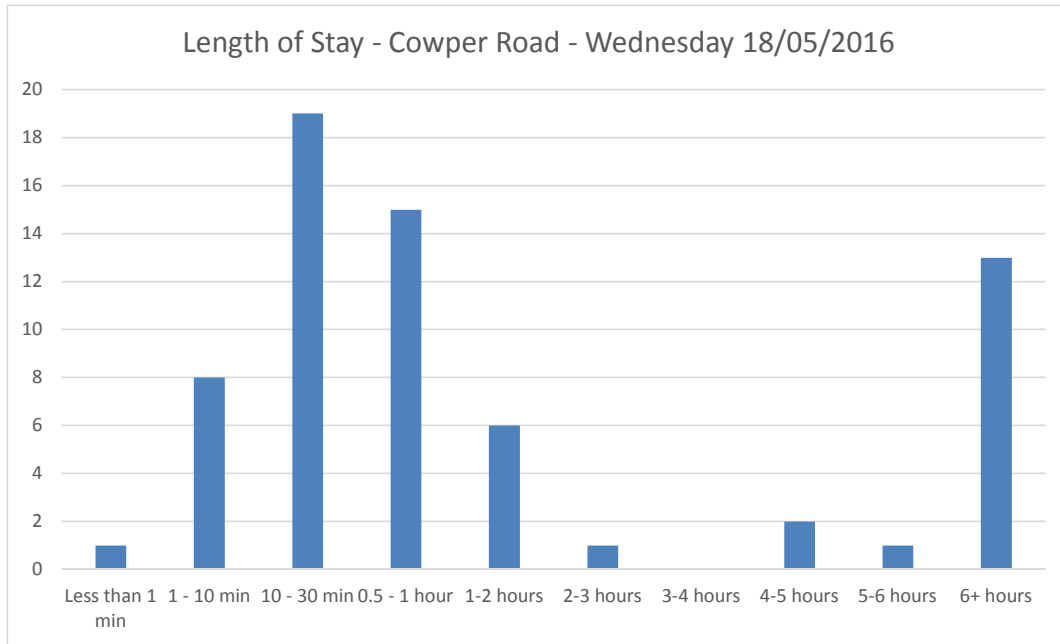
Car Park Accumulation

Car Park Number: 6B
 Site: Cowper Road
 Location: Breckland District Council
 Date: Saturday 21/05/2016
 Hours: 0700-1900

Cars parked at start	1
Total No of spaces	19
Cars parked at end	1

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	2	18
07:15	0	0	2	18
07:30	0	0	2	18
07:45	2	0	4	16
08:00	4	0	8	12
08:15	5	1	12	8
08:30	6	1	17	3
08:45	2	0	19	1
09:00	1	1	19	1
09:15	0	2	17	3
09:30	3	1	19	1
09:45	0	1	18	2
10:00	0	0	18	2
10:15	2	1	19	1
10:30	1	1	19	1
10:45	2	1	20	0
11:00	2	2	20	0
11:15	2	2	20	0
11:30	1	2	19	1
11:45	2	1	20	0
12:00	1	1	20	0
12:15	0	0	20	0
12:30	3	3	20	0
12:45	1	1	20	0
13:00	3	2	21	-1
13:15	1	1	21	-1
13:30	4	7	18	2
13:45	4	1	21	-1
14:00	0	0	21	-1
14:15	3	4	20	0
14:30	1	1	20	0
14:45	2	2	20	0
15:00	2	5	17	3
15:15	4	1	20	0
15:30	2	5	17	3
15:45	1	2	16	4
16:00	1	3	14	6
16:15	4	3	15	5
16:30	2	5	12	8
16:45	0	6	6	14
17:00	2	3	5	15
17:15	0	2	3	17
17:30	0	1	2	18
17:45	0	1	1	19
18:00	0	0	1	19
18:15	0	0	1	19
18:30	0	0	1	19
18:45	0	0	1	19

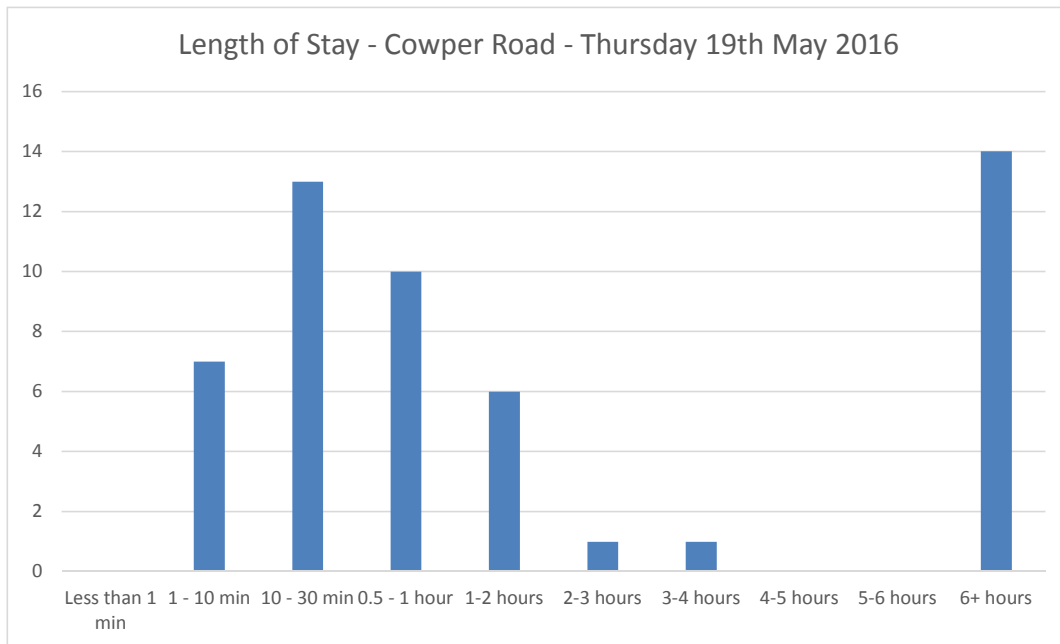




Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

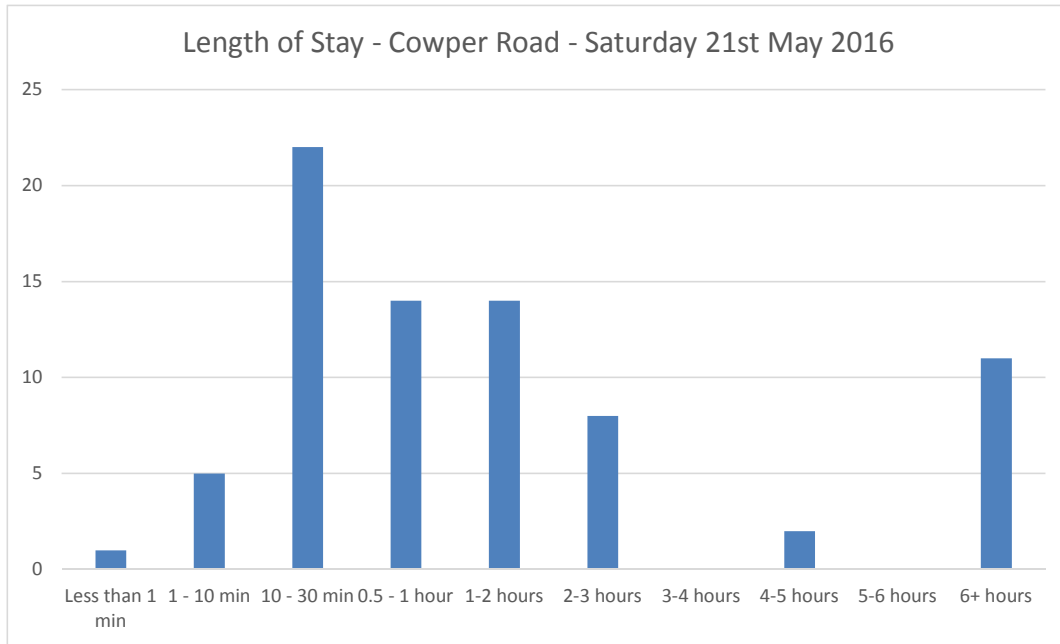
Parked at 7:00 and leave during the day:	2	
Arrive during the survey however parked at 19:00:	4	0
Vehicles not moved during survey:	0	4



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	1	
Arrive during the survey however parked at 19:00:	2	0
Vehicles not moved during survey:	0	2



Note:

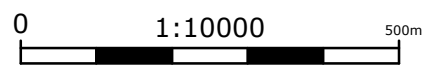
The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	0	
Arrive during the survey however parked at 19:00:	0	0
Vehicles not moved during survey:	1	0



CAR PARK INFORMATION

NO	NAME	TOTAL NO. SPACES	NO. DISABLED SPACES
1	QUEENS SQUARE	109	8
2	EDENSIDE	46	2
3	HORSE PIT	22	1
4	SWAFFHAM HILL	24	0
5	THE GUILDHALL	93	5
6A	COWPER ROAD	163	8
6B	COWPER ROAD		
7	CHEERY TREE	446	5
8	STATION STREET	26	0
9	THEATRE STREET	266	4
10	LYNN STREET	22	0
11	PEDLARS	20	0
12	MARKET PLACE	58	0
13	PIT LANE		0
14	ST NICHOLAS ST	38	0
15	LAND AT MINISTER GATE		
16	THE LINK	30	1
17	TANNER ST NORTH	54	2
18	TANNER ST SOUTH	68	3
19A	SCHOOL LANE(N)	77	2
19B	SCHOOL LANE (S)		
20	WHITE HART STREET	37	2
21	CAGE LANE	26	1
22	BURY ROAD	36	0
23	MARKET PLACE	21	2
24	PIKE LANE	85	5
25	ST GILES LANE (E)	39	3
26A	ST GILES LANE (W-A)	64	3
26B	ST GILES LANE (W-B)		



Multidisciplinary Consulting

190 Eureka Park, Upper Pemberton, Ashford, Kent TN25 4AZ
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 Website: www.mlm.uk.com

Drawing Status: **INFORMATION**

Client: **THE LAND GROUP**

Project: **BRECKLAND DISTRICT COUNCIL - CAR PARKING REVIEW**

Drawing Title: **CAR PARK NUMBER 7-DEREHAM**

Drawn/Design	JW	Date	27/04/16	Scales	1:1000 @ A3
Checked	LAB	Approved	LAB		

Drawing No. **617548/SK07** Rev **A**

A	13.03.16	PHOTOGRAPHS ADDED	LRE	LAB
Rev	Date	Description	Made	Ckd

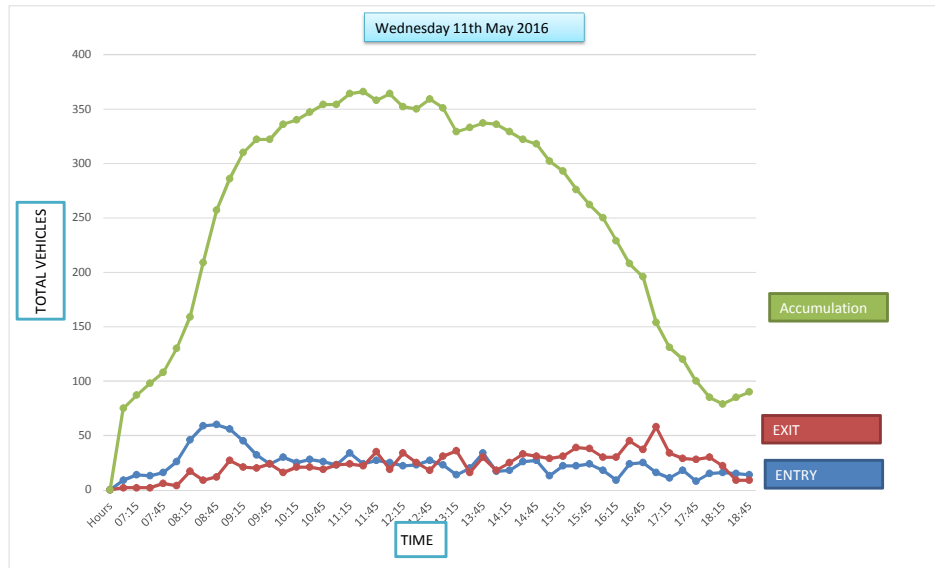
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Car Park Accumulation

Car Park Number: 7
 Site: Cherry Tree
 Location: Breckland District Council
 Date: Wednesday 11th June 2016
 Hours: 0700-1900

Cars parked at start	68
Total No of spaces	446
Cars parked at end	90

Hours	Entry	Exit	Accumulation	Spaces available
07:00	9	2	75	378
07:15	14	2	87	366
07:30	13	2	98	355
07:45	16	6	108	345
08:00	26	4	130	323
08:15	46	17	159	294
08:30	59	9	209	244
08:45	60	12	257	196
09:00	56	27	286	167
09:15	45	21	310	143
09:30	32	20	322	131
09:45	24	24	322	131
10:00	30	16	336	117
10:15	25	21	340	113
10:30	28	21	347	106
10:45	26	19	354	99
11:00	23	23	354	99
11:15	34	24	364	89
11:30	24	22	366	87
11:45	27	35	358	95
12:00	25	19	364	89
12:15	22	34	352	101
12:30	23	25	350	103
12:45	27	18	359	94
13:00	23	31	351	102
13:15	14	36	329	124
13:30	20	16	333	120
13:45	34	30	337	116
14:00	17	18	336	117
14:15	18	25	329	124
14:30	26	33	322	131
14:45	27	31	318	135
15:00	13	29	302	151
15:15	22	31	293	160
15:30	22	39	276	177
15:45	24	38	262	191
16:00	18	30	250	203
16:15	9	30	229	224
16:30	24	45	208	245
16:45	25	37	196	257
17:00	16	58	154	299
17:15	11	34	131	322
17:30	18	29	120	333
17:45	8	28	100	353
18:00	15	30	85	368
18:15	16	22	79	374
18:30	15	9	85	368
18:45	14	9	90	363

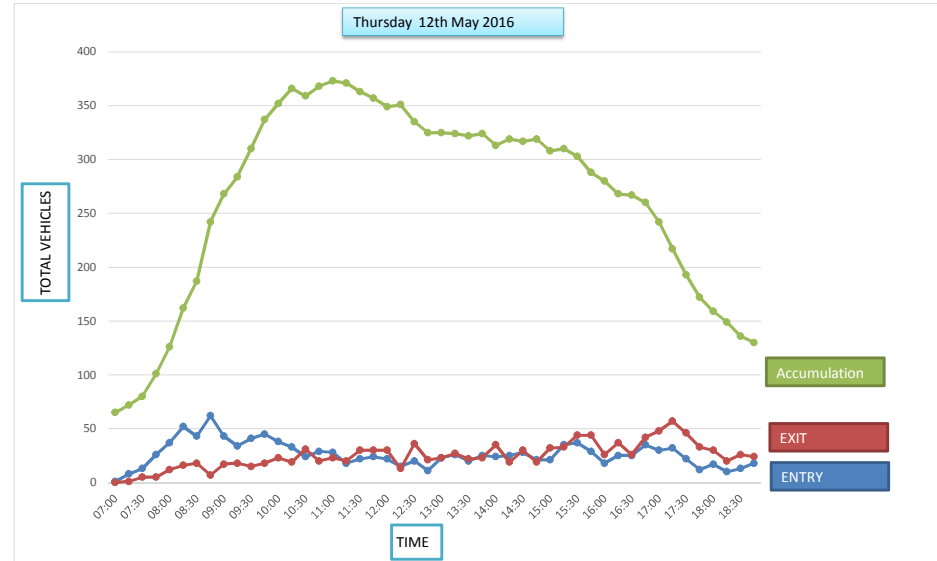


Car Park Accumulation

Car Park Number: 7
 Site: Cherry Tree
 Location: Breckland District Council
 Date: Thursday 12th June 2016
 Hours: 0700-1900

Cars parked at start	64
Total No of spaces	446
Cars parked at end	130

Hours	Entry	Exit	Accumulation	Spaces available
07:00	1	0	65	382
07:15	8	1	72	375
07:30	13	5	80	367
07:45	26	5	101	346
08:00	37	12	126	321
08:15	52	16	162	285
08:30	43	18	187	260
08:45	62	7	242	205
09:00	43	17	268	179
09:15	34	18	284	163
09:30	41	15	310	137
09:45	45	18	337	110
10:00	38	23	352	95
10:15	33	19	366	81
10:30	24	31	359	88
10:45	29	20	368	79
11:00	28	23	373	74
11:15	18	20	371	76
11:30	22	30	363	84
11:45	24	30	357	90
12:00	22	30	349	98
12:15	15	13	351	96
12:30	20	36	335	112
12:45	11	21	325	122
13:00	23	23	325	122
13:15	26	27	324	123
13:30	20	22	322	125
13:45	25	23	324	123
14:00	24	35	313	134
14:15	25	19	319	128
14:30	28	30	317	130
14:45	21	19	319	128
15:00	21	32	308	139
15:15	35	33	310	137
15:30	37	44	303	144
15:45	29	44	288	159
16:00	18	26	280	167
16:15	25	37	268	179
16:30	25	26	267	180
16:45	35	42	260	187
17:00	30	48	242	205
17:15	32	57	217	230
17:30	22	46	193	254
17:45	12	33	172	275
18:00	17	30	159	288
18:15	10	20	149	298
18:30	13	26	136	311
18:45	18	24	130	317

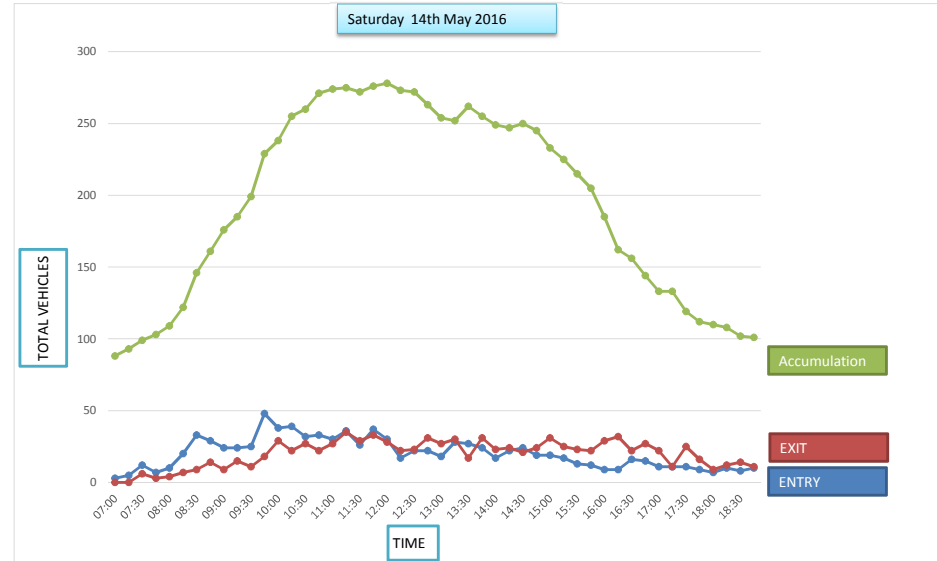


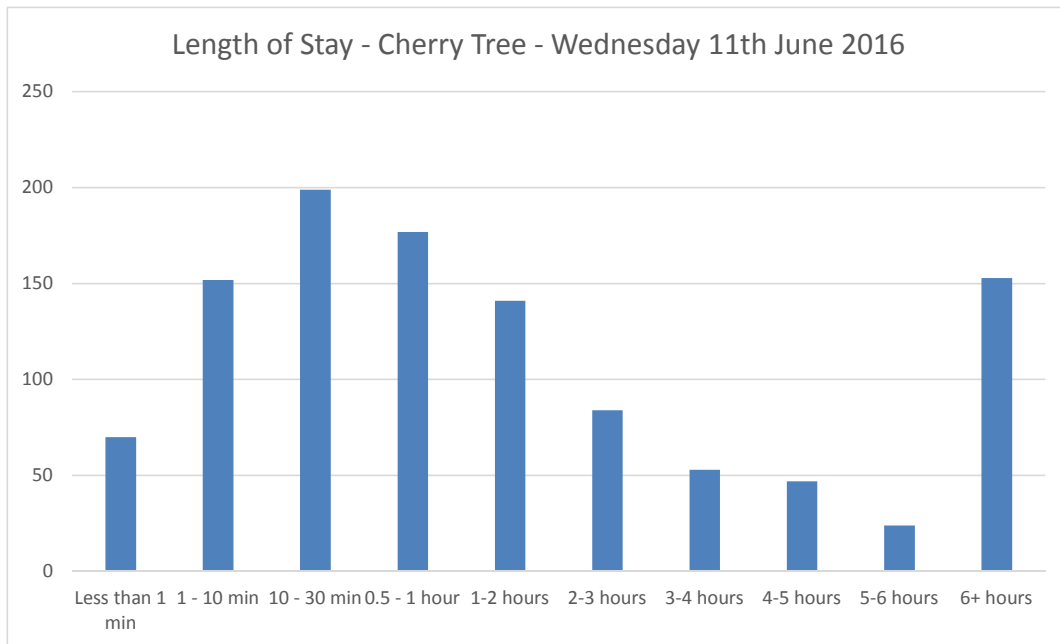
Car Park Accumulation

Car Park Number: 7
 Site: Cherry Tree
 Location: Breckland District Council
 Date: Saturday 14th June 2016
 Hours: 0700-1900

Cars parked at start	85
Total No of spaces	446
Cars parked at end	101

Hours	Entry	Exit	Accumulation	Spaces available
07:00	3	0	88	361
07:15	5	0	93	356
07:30	12	6	99	350
07:45	7	3	103	346
08:00	10	4	109	340
08:15	20	7	122	327
08:30	33	9	146	303
08:45	29	14	161	288
09:00	24	9	176	273
09:15	24	15	185	264
09:30	25	11	199	250
09:45	48	18	229	220
10:00	38	29	238	211
10:15	39	22	255	194
10:30	32	27	260	189
10:45	33	22	271	178
11:00	30	27	274	175
11:15	36	35	275	174
11:30	26	29	272	177
11:45	37	33	276	173
12:00	30	28	278	171
12:15	17	22	273	176
12:30	22	23	272	177
12:45	22	31	263	186
13:00	18	27	254	195
13:15	28	30	252	197
13:30	27	17	262	187
13:45	24	31	255	194
14:00	17	23	249	200
14:15	22	24	247	202
14:30	24	21	250	199
14:45	19	24	245	204
15:00	19	31	233	216
15:15	17	25	225	224
15:30	13	23	215	234
15:45	12	22	205	244
16:00	9	29	185	264
16:15	9	32	162	287
16:30	16	22	156	293
16:45	15	27	144	305
17:00	11	22	133	316
17:15	11	11	133	316
17:30	11	25	119	330
17:45	9	16	112	337
18:00	7	9	110	339
18:15	10	12	108	341
18:30	8	14	102	347
18:45	10	11	101	348

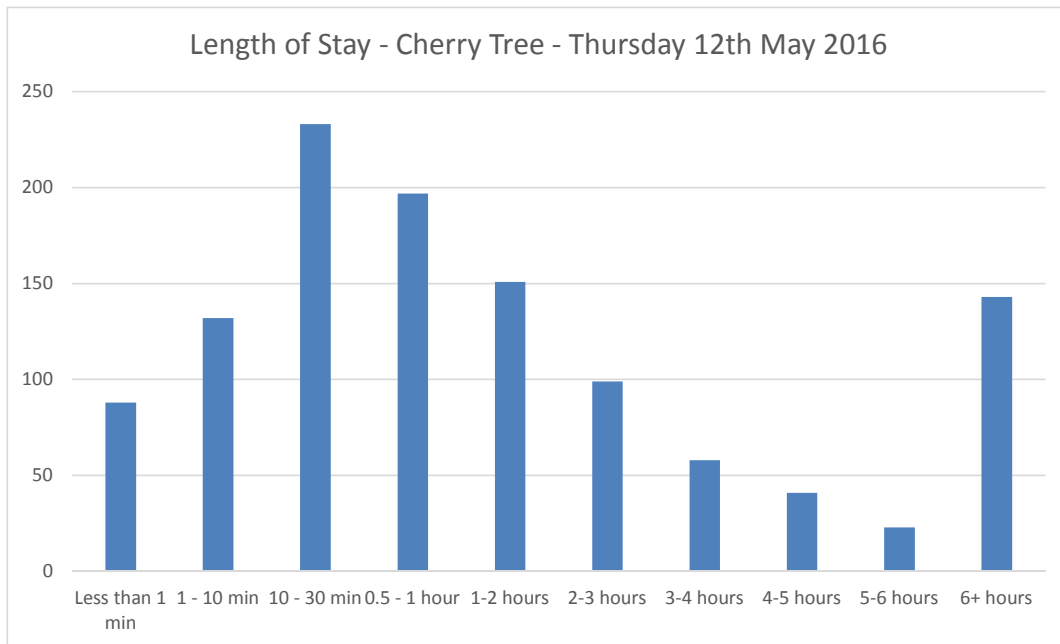




Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

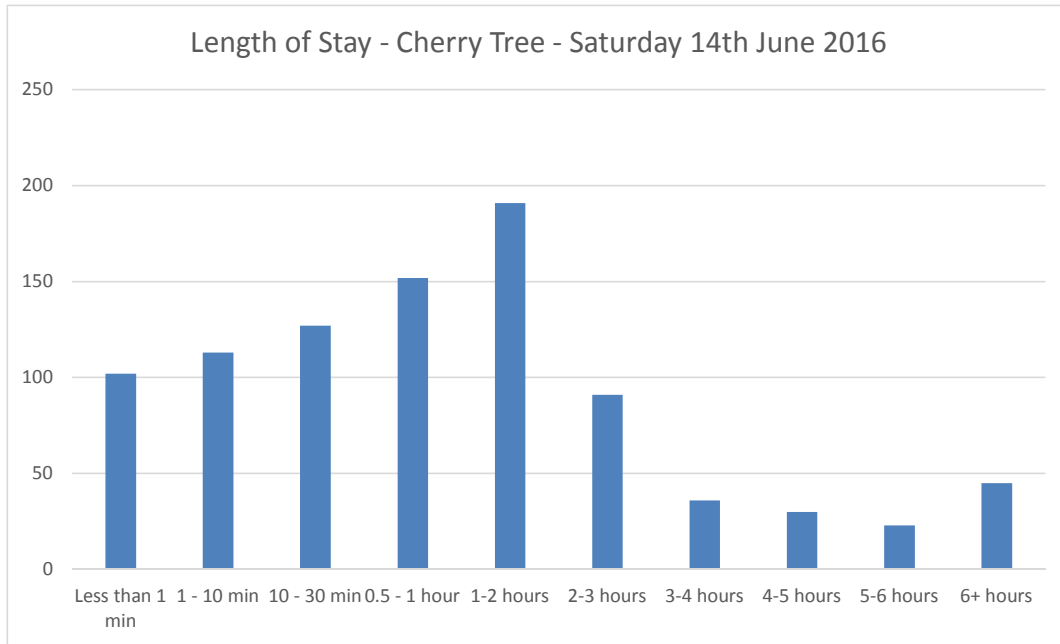
Parked at 7:00 and leave during the day:	41	
Arrive during the survey however parked at 19:00:	63	31
Vehicles not moved during survey:	27	32



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	29	
Arrive during the survey however parked at 19:00:	95	26
Vehicles not moved during survey:	35	69



Note:

The traffic surveys recorded data between 7:00 and 19:00 during the day therefore vehicles arriving / departing before and after these times have been excluded from the above chart. This may include long term parking and the excluded data is summarised below:

Parked at 7:00 and leave during the day:	42	
Arrive during the survey however parked at 19:00:	58	16
Vehicles not moved during survey:	43	42



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Appendix III
Car Parking
Capacity
Analysis

2016 CAR PARKING SURVEY AND COARSE FUTURE PROJECTIONS

A: MINIMUM SPARE SPACES - 2016

	Total Spaces	Wednesday		Thursday		Saturday	
	No.	No.	%	No.	%	No.	%
Swaffham Hill	24	0	0%	2	8%	3	13%
Guildhall	93	27	29%	27	29%	40	43%
Cowper Road East	144	27	19%	22	15%	20	14%
Cowper Road West	19	0	0%	1	5%	0	0%
Cherry Tree	446	89	20%	74	17%	171	38%

B: MAXIMUM USED SPACES - 2016

	Total Spaces	Wednesday		Thursday		Saturday	
	No.	No.	%	No.	%	No.	%
Swaffham Hill	24	24	100%	22	92%	21	88%
Guildhall	93	66	71%	66	71%	53	57%
Cowper Road East	144	117	81%	122	85%	124	86%
Cowper Road West	19	19	100%	18	95%	19	100%
Cherry Tree	446	357	80%	372	83%	275	62%

C: PROJECTED MAXIMUM USED SPACES - 2036

	Total Spaces	Wednesday		Thursday		Saturday	
	No.	No.	%	No.	%	No.	%
Swaffham Hill	24	28	116%	26	106%	24	102%
Guildhall	93	77	82%	77	82%	61	66%
Cowper Road East	144	136	94%	142	98%	144	100%
Cowper Road West	19	22	116%	21	110%	22	116%
Cherry Tree	446	414	93%	432	97%	319	72%

Notes:

2016 data taken from 2016 MLM car parking surveys.

2036 projections based upon:

2001 households	6941
Completions 2001-2016	1611
2016 households	8552

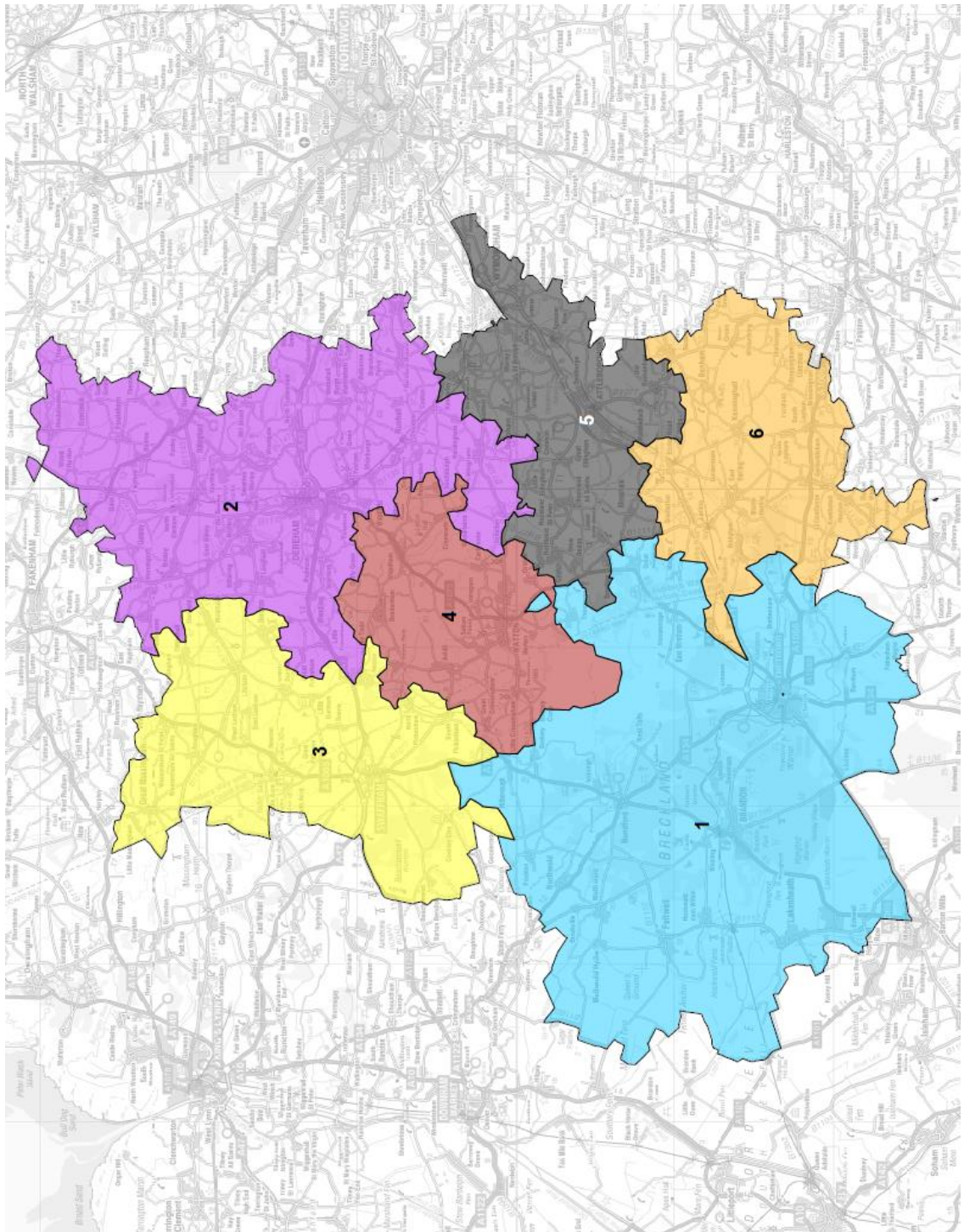
Unimplemented commitments at 2016	600
Future allocations (in new Local Plan)	750
Additional homes post-2016	1350

% growth (1350/8552) = 16%



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Appendix IV
Study Area for
2014 and 2017
Retail Study
Documents



GVA

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Appendix V
Photos of
Cirencester
Market Place



HORTON CHEMIST

THE CANTINA OF

CHEMIST

bensons beds

HALF PRICE
SALE
£200 OFF
BEST HALF PRICE



JONES

CREW CLOTHING COMPANY

HSBC UK

vodafonemove



GOLDSMITHS

HOTEL

Mistral



GOLDSMITHS
SINCE 1778

THE COVENTRY

COLES

COVENTRY
RESTAURANT

COVENTRY

Hotel



HORTON CHEMIST

SAHARA

GOLDSMITH'S

THE COVENTRY

benson & bedford

PROTECTIVE
MOP FLEET



HORTON CHEMIST

SAHARA

GOLDSMITHS

COVENTRY



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Appendix VI
Additional
Retail
Capacity
Analysis

TABLE 1: ADDITIONAL NEIGHBOURHOOD PLAN HOUSING UNIT ANALYSIS (1,000 UNITS)

UNITS	PERSONS PER HOUSEHOLD	POPULATION	PER CAPITA EXP (2036)			TOTAL EXP (£m)		
			Convenience	Comparison	F&B	Convenience	Comparison	F&B
1000	2.2	2200	£2,238	£5,142	£1,348	£4.9	£11.3	£3.0
			Market Share (Dereham Zone)			81%	47%	43%
			Available additional expenditure (£m)			£4.0	£5.3	£1.3
			Sales density of new space (2036) (£/sq m)			11394	7430	6161
			Additional net sales area (sq m net)			352	713	207

Notes assumes that DTC allocate an additional 1,000 homes in the Neighbourhood Plan, over and above housing total in new Breckland Local Plan

TABLE 2: ADDITIONAL NEIGHBOURHOOD PLAN HOUSING UNIT ANALYSIS (1,300 UNITS)

UNITS	PERSONS PER HOUSEHOLD	POPULATION	PER CAPITA EXP (2036)			TOTAL EXP (£m)		
			Convenience	Comparison	F&B	Convenience	Comparison	F&B
1300	2.2	2860	£2,238	£5,142	£1,348	£6.4	£14.7	£3.9
			Market Share (Dereham Zone)			81%	47%	43%
			Available additional expenditure (£m)			£5.2	£6.9	£1.7
			Sales density of new space (2036) (£/sq m)			11394	7430	6161
			Additional net sales area (sq m net)			457	926	269

Notes assumes that DTC allocate an additional 1,300 homes in the Neighbourhood Plan, over and above housing total in new Breckland Local Plan

TABLE 3: UPDATED CONVENIENCE GOODS FLOORSPACE CAPACITY (INCLUDING ALDI) (BASELINE)

	2017	2021	2026	2031	2036
Available convenience goods expenditure (£m)	£95.14	£97.22	£103.02	£108.84	£115.34
Lichfields benchmark turnover (£m)	£93.12	£93.12	£93.12	£93.12	£93.12
ALDI benchmark turnover (£m)	£10.50	£10.50	£10.50	£10.50	£10.50
Total benchmark turnover (£m)	£103.62	£103.62	£103.62	£103.62	£103.62
Residual	-£8.48	-£6.40	-£0.60	£5.22	£11.72
Sales density convenience goods floorspace (£/sq m)	£11,394	£11,394	£11,394	£11,394	£11,394
Residual floorspace capacity (sq m net)	-744	-562	-53	458	1029

Notes:

available convenience goods expenditure taken from Table 13 (Appendix 2) 2017 Retail Study Addendum.

Lichfields benchmark turnover taken from Table 12 (Appendix 2) 2017 Retail Study Addendum.

ALDI benchmark turnover calculated by GVA

Sales density for new convenience goods floorspace taken from Table 14 (Appendix 2) 2017 Retail Study Addendum.

TABLE 4: UPDATED CONVENIENCE GOODS FLOORSPACE CAPACITY (INCLUDING ALDI) (+1000 ADDITIONAL UNITS)

	2036
Available convenience goods expenditure (£m)	£115.34 £4.01
Lichfields benchmark turnover (£m)	£93.12
ALDI benchmark turnover (£m)	£10.50
Total benchmark turnover (£m)	£103.62
Residual	£15.73
Sales density convenience goods floorspace (£/sq m)	£11,394
Residual floorspace capacity (sq m net)	1380

Notes:

available convenience goods expenditure taken from Table 13 (Appendix 2) 2017 Retail Study Addendum.

Lichfields benchmark turnover taken from Table 12 (Appendix 2) 2017 Retail Study Addendum

ALDI benchmark turnover calculated by GVA

Sales density for new convenience goods floorspace taken from Table 14 (Appendix 2) 2017 Retail Study Addendum.

Additional expenditure for 1,000 additional units taken from Table 1.

TABLE 5: UPDATED CONVENIENCE GOODS FLOORSPACE CAPACITY (INCLUDING ALDI) (+1300 ADDITIONAL UNITS)

	2036
Available convenience goods expenditure (£m)	£115.34 £5.21
Lichfields benchmark turnover (£m)	£93.12
ALDI benchmark turnover (£m)	£10.50
Total benchmark turnover (£m)	£103.62
Residual	£16.93
Sales density convenience goods floorspace (£/sq m)	£11,394
Residual floorspace capacity (sq m net)	1486

Notes:

available convenience goods expenditure taken from Table 13 (Appendix 2) 2017 Retail Study Addendum.

Lichfields benchmark turnover taken from Table 12 (Appendix 2) 2017 Retail Study Addendum

ALDI benchmark turnover calculated by GVA

Sales density for new convenience goods floorspace taken from Table 14 (Appendix 2) 2017 Retail Study Addendum.

Additional expenditure for 1,300 additional units taken from Table 2.

TABLE 6: QUANTITATIVE CLASS A RETAIL FLOORSPACE (INCLUDING D6)

	2017-2026 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)	2026-2036 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)
Convenience	0			1470		
Comparison	2342			4618		
F&B	352			497		
Total	2694	7136	4442	6585	6088	-497
Physical Capacity						
		<i>2017-2026 (sq m gross)</i>			<i>2026-2036 (sq m gross)</i>	
D6		6000				
Wrights Walk Phase 2		462				
25% of capacity accommodated in vacancies		674			1646	

Notes:
2017-2026 forecast capacity taken from 2017 Retail Study Addendum and Table 3 (turning net forecast into a gross floorspace figure).
Physical capacity based on an assumption that D6 allocation can accommodate 6,000sq m floorspace and that 25% forecast capacity can be accommodated in vacant units.
Physical capacity at 2026-2036 is surplus from 2017-206 plus 25% of capacity allocated to vacancies.

TABLE 7: QUANTITATIVE CLASS A RETAIL FLOORSPACE (EXCLUDING D6)

	2017-2026 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)	2026-2036 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)
Convenience	0			1470		
Comparison	2342			4618		
F&B	352			497		
Total	2694	1136	-1559	6585	88	-6497
Physical Capacity						
		<i>2017-2026 (sq m gross)</i>			<i>2026-2036 (sq m gross)</i>	
D6		0				
Wrights Walk Phase 2		462				
25% of capacity accommodated in vacancies		674			1646.25	

Notes:

2017-2026 forecast capacity taken from 2017 Retail Study Addendum and Table 3 (turning net forecast into a gross floorspace figure).

Physical capacity based on an assumption that D6 allocation can accommodate 0sq m floorspace and that 25% forecast capacity can be accommodated in vacant units.

Physical capacity at 2026-2036 is surplus from 2017-206 plus 25% of capacity allocated to vacancies.

TABLE 8: QUANTITATIVE CLASS A RETAIL FLOORSPACE (INCLUDING D6 PLUS 1300 EXTRA HOUSES)

	2017-2026 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)	2026-2036 Forecast Capacity (sq m gross)	Physical Capacity (sq m gross)	Surplus / Deficit (sq m gross)
Convenience	0			2123		
Comparison	2805			5081		
F&B	487			632		
Total	3292	7136	3844	7835	5490	-2345
Physical Capacity						
		<i>2017-2026 (sq m gross)</i>			<i>2026-2036 (sq m gross)</i>	
D6		6000				
Wrights Walk Phase 2		462				
25% of capacity accommodated in vacancies		674			1646	

Notes:
2017-2026 forecast capacity taken from 2017 Retail Study Addendum, Table 2 (additional 1,300 units) and Table 5 (turning net forecast into a gross floorspace figure).
Physical capacity based on an assumption that D6 allocation can accommodate 6,000sq m floorspace and that 25% forecast capacity can be accommodated in vacant units.
Physical capacity at 2026-2036 is surplus from 2017-206 plus 25% of capacity allocated to vacancies.