AVISON YOUNG

Greater Norwich Town Centres & Retail Study Update

December 2020

Contents

Appendices

1. Introduction

1.1 This Greater Norwich Town Centres & Retail Study Update report ('the Update Study') has been prepared by Avison Young ('AY') for Norfolk County Council, Norwich City Council, Broadland District Council and South Norfolk Council (also known as the Greater Norwich Development Partnership) (hereafter referred to as 'the Client'). In 2017, AY (formerly GVA) completed the Greater Norwich Town Centres & Retail Study ('the 2017 Study') which was part of the wider Employment, Retail and Town Centre Study and provided evidence base information and analysis for the Client for the new Greater Norwich Local Plan in the following areas:

- A review of the health of defined 'town centres' in the Greater Norwich area.
- An analysis of the 'need' for retail floorspace across the Greater Norwich area.
- An assessment of commercial leisure uses, including their usage and provision.

1.2 In July 2020 the Client identified the need to update the evidence base on economic, employment land supply and retail issues to reflect the passage of time since the existing evidence was produced and most particularly to take account of the impact of both the UK's exit from the European Union and the COVID-19 pandemic. As a consequence, AY have produced two separate reports: this Update Study and also an Employment Land Assessment Addendum.

1.3 This report concentrates upon the following issues:

- A review of current / recent trends in the retail sector, including changes in economic forecasts since the completion of the 2017 Study, and how the UK's exit from the European Union and the current COVID-19 pandemic are affecting the retail sector.
- An updated assessment of quantitative retail expenditure capacity for convenience and comparison goods across the main settlements in the Greater Norwich development plan area. This assessment adopts an updated timeframe and the latest economic forecasts recently published by Experian.
- Advice in relation to the planning policy approach for retail land use issues in the Greater Norwich area, which takes into account changes in national planning policy since the completion of the 2017 Study and recent changes to the Use Classes Order.

1.4 From the outset, it should be noted that this Study has been prepared during the on-going effects of COVID-19 pandemic, which has had a severe impact upon the UK economy in 2020 (and how the population went about their working and day-to-day lives). The content of this Study includes evidence base data which was collected in association with the 2017 Study (including shopping and leisure patterns) and also the latest economic data from Experian published in October 2020 (which incorporate the latest forecasts in relation to the potential impact of the COVID-19 pandemic).

1.5 As a consequence, the factual content of this Study should be read and understood in this context. Moreover, as will be discussed further later in this report, the impact of the COVID-19 pandemic is, based upon current predictions, likely to have long-lasting effects on the UK economy and how people interact with retail, leisure and wider town centre uses. Therefore, the content of this Study should be seen as a baseline for the evidence base library for the Local Plan and there will be a need for the Client to consider updates to the health checks, economic forecasts and shopping patterns in due course, as the preparation of the Local Plan progresses.

1.6 The remainder of this document is structured in the following manner:

- Section 2 outlines the current planning policy context, including the changes which have occurred since the completion of the 2017 Study.
- In Section 3 we outline the latest available information and forecasts associated with the retail sector and town centre trends, including the latest available forecasts which take into account the effects of the current COVID-19 pandemic.
- We provide our updated assessment of the need for retail floorspace in the Greater Norwich area in Section 4, taking into account the latest economic forecasts.

1.7 All plans, statistical data and other information referred to in the main text of this report can be found in appendices contained at the rear of this document.

2. Planning Policy and Legislation

Introduction

2.1 The 2017 Study provided a detailed review of existing development plan policy across the Greater Norwich area alongside national planning policy and guidance in force at that time. Much of the content of Section 2 of the 2017 Study remains factually correct and therefore this section of the Study outlines the changes in national planning policy and guidance since the completion of the previous study. It also outlines the recent changes in the Use Classes Order insofar as they affect retail and other main town centre uses and their corresponding planning policy context.

National Planning Policy Framework ('NPPF')

2.2 At the time of preparing the 2017 Study, the 2012 version of the NPPF was the current version of national planning policy. The NPPF has subsequently been revised and Section 7 of the February 2019 NPPF deals with retail, leisure and main town centre land use issues and closely follows the 2012 version of the NPPF. The main changes insofar as retail, leisure and main town centre land use issues are concerned are:

- Whilst the two main policy tests for proposals outside of town centres (and not in accordance with an up to date development plan) remain the sequential and impact tests, the new NPPF (2019) has clarified the issue of availability of alternative sites (in the sequential test) as being available within 'a reasonable period of time'. However, there is no definition (or guidance) as to what is 'a reasonable period of time' in the context of proposals for main town centre uses.
- The new NPPF has deleted the requirement for local authorities to define primary and secondary retail frontages in development plan. The new NPPF still requires local authorities to define town centre boundaries and primary shopping areas.
- Whilst the requirement to allocate sites to meet identified needs remains, the new NPPF indicates that this should be at least ten years ahead, rather than the full plan period as previously advised.
- The new NPPF does not now provide any guidance on how 'needs' should be assessed for main town centre uses (previously quantitative and qualitative indicators were cited).

National Planning Practice Guidance

2.3 Following initial publication in 2014, the NPPG on town centre planning policy was updated in July 2019 and September/November 2020.

2.4 The latest version sets out the recommended content of town centre strategies, the indicators which are useful for planning for town centres and high streets, the permitted development rights which are available in relation to main town centre uses and also how local authorities should approach the application of the sequential and impact tests in terms of both plan making and development management issues. The NPPG also provides guidance on setting a locally appropriate impact assessment threshold.

Changes to the Use Classes Order

2.5 Section 2 of the 2017 Study outlined the various permitted development rights involving retail and other main town centre uses which were in force at that time. During 2018, the Government undertook a public consultation on updating the use classes order to reflect changing high streets and make them more resilient. Following that consultation, the government announced that it would amend Use Class A1 (shops) to ensure that it captured current and future retail models, although the advent of COVID-19 has prompted the government to go further and introduce more wide-ranging reforms. These were announced in July 2020 and came into effect on the 1st September 2020. A legal challenge to the changes was dismissed by the High Court was dismissed in November 2020.

2.6 In summary, part of the proposed changes revoke Parts A and D of the existing use classes order and introduce a new Use Class E. In relation to retail and main town centre uses the changes will be as follows:

- A new Class E is to be introduced which will encompass the former A1, A2, A3, B1a, B1b, B1c and part of the D2 use class (for gyms and indoor recreational facilities) .
- The former A4 and A5 uses will now become sui generis uses, as will part of the former Class D2 uses comprising cinemas, concert halls, bingo halls and dance halls.

2.7 The explanatory memorandum published by the government notes that:

> *"The current Use Classes Order was introduced in 1987 and has been amended a number of times since. However, the government considers that it requires a complete overhaul to better reflect the diversity of uses found on high streets and in town centres and to provide the flexibility for businesses to adapt and diversify to meet changing demands. This is particularly important at the present time as town centres seek to recover from the economic impact of Coronavirus. Modern high streets and town centres have changed so that they now seek to provide a wider range of facilities and services, including new emerging uses, that will attract people and make these areas viable now and in the future".*

and

> *"They create a new broad 'Commercial, business and service' use class (Class E) which incorporates the previous shops (A1), financial and professional services (A2), restaurants and cafes (A3) and offices (B1) use classes. Uses such as gyms, nurseries and health centres (previously in use classes D1 Non-residential institutions and D2 Assembly and leisure) and other uses which are suitable for a town centre area are also included in the class. This new class allows for a mix of uses to reflect changing retail and business models. It therefore, recognises that a building may be in a number of uses concurrently or that a building may be used for different uses at different times of the day. Changes to another use, or mix of uses, within this class do not require planning permission. Bringing these uses together and allowing movement between them will give businesses greater freedom to adapt to changing circumstances and to respond more quickly to the needs of their communities".*

and

> *"The revisions to the Use Classes Order also provide for the need for local consideration of some uses. The former A4 Drinking establishments and A5 Hot food takeaway use classes have been removed. We recognise that changes of use to or from these uses can give rise to important local considerations, for example, to ensure that local pubs can be protected or to prevent the proliferation of hot food takeaways. We have therefore, included these uses in the list of uses which are specifically identified in the Use Classes Order (see Article 3(6)) as uses which do not now fall within any use class. We have also taken this approach with cinemas, concert, dance and bingo halls which fell within the former D2 use class. This will mean that changes to and from these uses will be subject to full local consideration through the planning application process.*
>
> *These reforms are primarily aimed at creating vibrant, mixed use town centres by allowing businesses greater freedom to change to a broader range of compatible uses which communities expect to find on modern high streets, as well as more generally in town and city centres. They apply to all uses of land and buildings across England".*

2.8 As noted above, there were a number of existing (pre-September 2020) permitted development rights which granted general permission, allowing changes of use between the former use classes without the need to submit a planning application. The recently introduced regulations provide transitional provisions which retain the effect of the older permitted development rights based on the classes that were in place prior to these new regulations coming into force. A building or use will continue to be subject to any permitted development rights that it was entitled to on or before 31st August 2020. It is proposed that the transitional provisions will remain in place until 31st July 2021 when new, revised permitted development rights will be introduced. These savings provisions also apply to relevant Article 4 Directions.

2.9 The September 2020 changes raise a number of issues regarding development management issues and the drafting of new / revised development plan policies and strategies, including:

- The recent changes do not have any spatial restrictions. Therefore, whilst the 'headline' issue from the government is to help town centres and take into account changing trends, the new permitted development rights apply equally to relevant land uses outside of town centres which may have implications for the introduction of new retail and leisure uses without the requirement for planning permission. This is explored in Section 5 later in this document.

- Whilst the recent changes are fairly straight-forward on face value, it is likely, in our opinion, for the full implications to take some time to understand. This will be reinforced by the proposed further changes in expected in July 2021.
- Prior to the preparation of new development plan documents in the coming years, including the new Greater Norwich Local Plan, it is likely that the development management functions of the client team will need to apply existing town centre 'development' policies in light of the new regime. In addition, there will be a need to consider how to assess and determine proposals for new Class E land uses located outside of defined 'town centres'.
- Taking into account the changes in national policy and, more importantly, changes in the use classes order, it is likely that refined development management policies will be required in new development plan documents. In many cases, these new policies are likely to be a departure from existing 'traditional' town centre development management policies.

2.10 In addition to the changes introduced in September 2020, the government has very recently published a consultation on further changes to permitted development rights. The published consultation notes that:

> *"It is proposed that the right would allow for the change of use from any use, or mix of uses, within the Commercial, Business and Service use class (Class E – see paragraph 12 above) to residential use (C3). The right would replace the current rights for the change of use from office to residential (Part 3, Class O of Schedule 2 to the General Permitted Development Order), and from retail etc to residential (Part 3, Class M of the General Permitted Development Order) which remain in force until 31 July 2021. (See also Part 3 of this consultation document in respect of consequential changes.) It will go significantly beyond existing rights, allowing for restaurants, indoor sports, and creches etc to benefit from the change use to residential under permitted development rights for the first time. The protections in respect of pubs, including those with an expanded food offer, theatres, and live music venues, all of which are outside of this use class, continue to apply and a full planning application is always required for the change of use to or from such uses".*

2.11 These issues are explored in Section 5 later in this document.

3. Retail and Town Centre Trends

Introduction

3.1 A common and necessary introductory part of any retail and town centres evidence base study is to set the context in terms of recent, current and potential future trends in the economy. This section of the Study provides this analysis although the on-going and uncertain effects of the world-wide COVID-19 pandemic mean that forecasts maybe subject to change due to the fast-moving circumstances of the pandemic. Therefore, this section provides the following information and analysis:

- The potential scenarios for the UK economy as a consequence of the COVID-19 pandemic;
- A review of the prospects for the UK economy and retailing in pre-COVID-19 'normal' circumstances; and
- Information on how the COVID-19 pandemic is affecting retailing and town centres.

3.2 Prior to the outbreak of COVID-19 in the UK, the UK economy slowed over 2019, with growth sliding to a 7 year low by the end of the year. The period was dominated by heightened Brexit uncertainty and a weaker global economy. Against this backdrop, business investment declined for the second year in a row and exports remained sluggish. Consumer spending also lost momentum, reflecting low confidence and lacklustre incomes growth. The outcome of the December 2019 general election removed near-term political uncertainty, empowering the government to push forward with spending pledges and EU withdrawal plans. At the start of 2020, the latest indicators pointed to a pick-up in business confidence and investment intentions. Housing market surveys also suggested that activity had been rebounding and consumer sentiment had also improved.

3.3 On the global front, a partial easing in trade disputes and loosening in monetary policy was encouraging. That said, lingering uncertainty over the outcome of the next phase of Brexit negotiations had expected to curb the pace of any investment recovery. Forecasts from Experian assumed an orderly transition to a new deep free trade agreement, but significant risks remain around the process, not least because of the extremely tight timetable (and now heightened by COVID-19). At the time of finalising this Update Study, a post-Brexit had still to be reached. Alongside this, forecasts on the recovery in consumer spending predict it to remain muted, reflecting modest incomes growth. Against this backdrop, GDP growth was predicted to remain on a slower growth trajectory of 1-1.5% over 2020 and 2021, well below the performance of earlier years.

COVID-19

3.4 The advent of COVID-19 has, and continues to have, a huge effect on all aspects of life around the world. Given that the full implications of COVID-19 are not yet able to be fully understood and predicted, Experian have outlined, earlier in 2020, four potential scenarios and their potential characteristics. Experian's analysis and the various scenarios are outlined below.

3.5 The outbreak of COVID-19 will have a considerable impact on the UK and global economies. Due to the unprecedented nature of the event and absence of hard data, it is impossible at this point to be confident of the scale and duration of the outbreak and the economic consequences of the measures to limit contagion. Hence, all forecasts will be subject to greater than usual uncertainty and volatility.

3.6 At the time of writing, Experian's view is that the V-shape cases outlined below are, on-balance, the more likely trajectories based on the scale of response from the UK and other governments. However, it should be noted from the outset of this analysis that the UK and global economy has never experienced a pandemic such as this and situation remains fast-moving. Indeed, whilst the UK started to ease certain 'lockdown' measures in June and July 2020, including the re-opening of non-essential shops (in controlled conditions), the prospect of a second wave of infections in Autumn/Winter 2020 is now apparent and a second 'lockdown' has been imposed. As a consequence, the content of this analysis should be seen as 'a point in time' and it will be important for the Council to keep matters under review during the life of preparing JCS Review.

3.7 The scenarios provided by Experian assume that the government follows the Imperial College ('ICL') recommendations for an Adaptive Suppression approach to managing the epidemic. This would involve an intensive period where a number of interventions (case isolation, household quarantine, social distancing of the whole population and closure of schools and universities) would be implemented until the number of cases falls below an acceptable threshold.

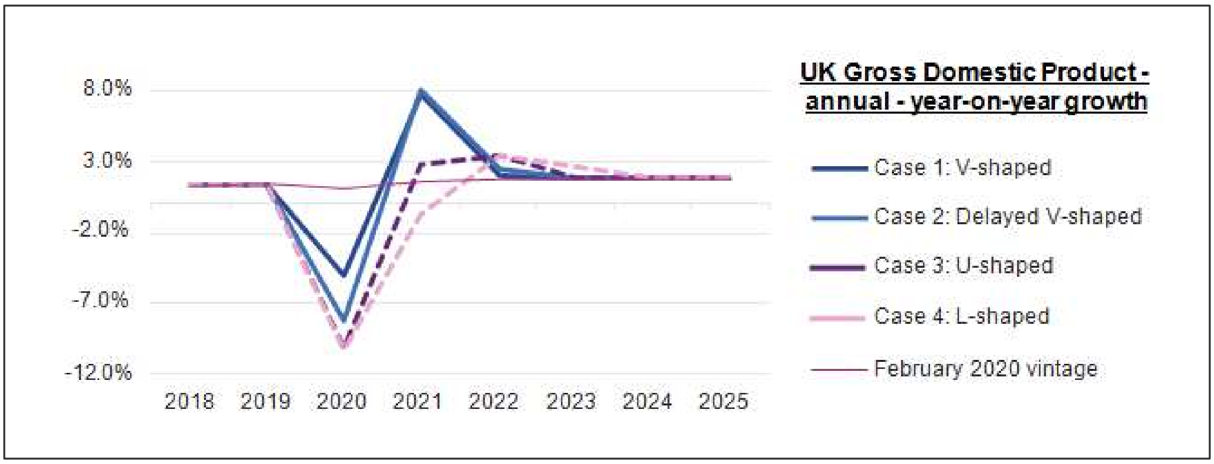
3.8 ICL recommended maintaining these interventions for 5 months, which is assumed to be followed in all scenarios except the V-shape case (3 months). To support the effectiveness of the suppression measures, the government has enforced periods of 'lockdown' involving the temporary closure of non-essential businesses and activities. Thereafter, it would be possible to relax these measures as long as hospital cases remained below a target threshold.

Scenario Overview

3.9 Figure 3.1 below shows the various forecast scenarios for year-on-year growth in UK Gross Domestic Product ('GDP') up until 2025. In cases 1 and 2, the COVID-19 outbreak is contained relatively swiftly allowing GDP to rebound strongly in a V-shape following a sharp decline in Q2, with minimal long-term scarring. Case 3 has the virus contained in the same timeframe as case 2, however the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling. This results in a U-shaped, rather than V-shaped recovery. In case 4, the scale of the credit crunch and the Sterling declines are significantly deeper. As the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

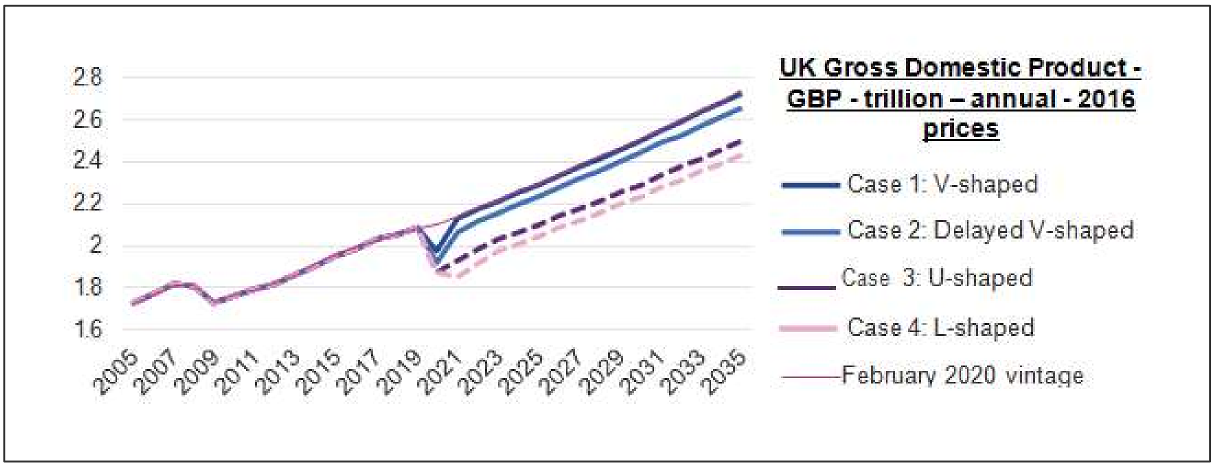
3.10 However, it should be noted that these forecasts were released by Experian earlier in 2020 and the imposition of a second period of lockdown is likely to have put back the period for recovery. As a consequence, the timeframes outlined below may need to be put back several months the advent of a number of potential new vaccines may well assist with the recovery process.

Figure 3.1: forecast UK GDP per annum



3.11 In levels terms, the lost output in the first half of 2020 is quickly recovered in the first two cases. However, it persistently lags behind where Experian were projecting in their February 2020 forecast. The U and L shaped cases show a more gradual recovery. In the former, it takes roughly five years for all lost output to be recovered, broadly in line with the experience following the global financial crisis. In the latter, it takes longer still.

Figure 3.2: GDP growth



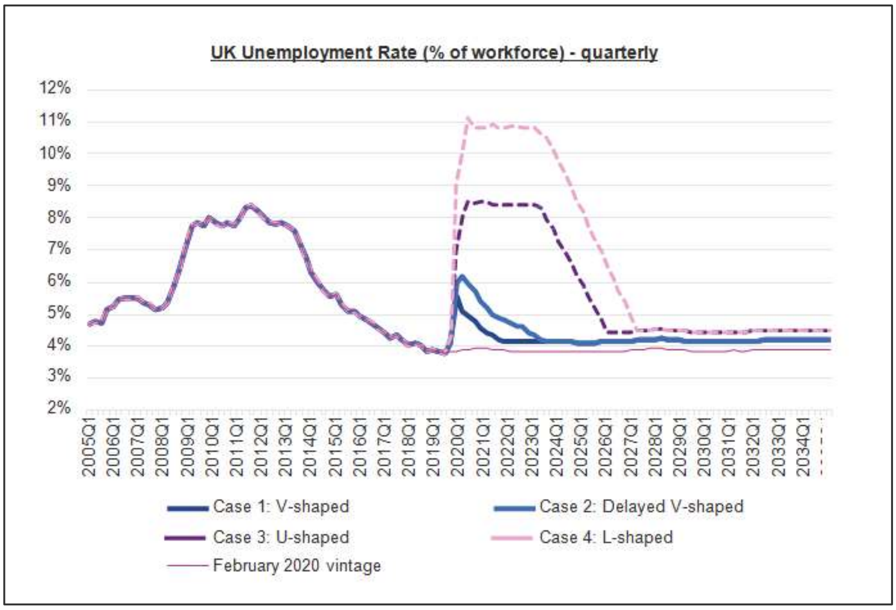
3.12 The government has announced a range of measures to mitigate the impact on households and businesses and, at the time of writing, it appears that further policies may follow.

3.13 In cases 1 & 2, the fiscal response is expected to successfully rein in the rate of job shedding.

3.14 The unemployment rate is anticipated to rise sharply and substantially in the second quarter of the year, as a range of sectors of the economy such as retail, leisure and hospitality, reduce staff.

3.15 In cases 3 and 4, the government measures to protect jobs are assumed to be far less successful, and the unemployment rate holds stubbornly high.

Figure 3.3: forecast UK employment rate



Scenario 1: V Shaped Recovery

3.16 In this case, the suppression policy goals are achieved faster than the ICL's estimates and the timescales around securing a vaccine are also at the optimistic end of the estimates. Technology and infrastructure are sufficiently enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised. Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine with sufficient stockpiles built to begin rollout to the 'at-risk' population group before the end of 2020.

3.17 In this scenario, the economic impacts are limited by the optimistic timeframes involved in bringing the epidemic under control. The reduction in infection rates triggers a swift rebound in investor, business and consumer confidence. Financial markets rebound and Sterling recovers. The tightening in credit conditions proves mild and short lived. Alongside this, mitigation efforts by the government prevent large scale job shedding and business insolvencies, which enables activity to recover relatively swiftly as workers return to normal working hours, businesses re-open and delayed investments are restarted.

3.18 Since devising this scenario, experience throughout 2020 has indicated that it was too optimistic in a number of areas and can now be largely discounted.

Scenario 2: Delayed V Shaped Recovery

3.19 In this case, the suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months. Numbers infected reduce rapidly and suppression measures begin to unwind, with the resurgence of cases well controlled. Technology and infrastructure are sufficiently enhanced to enable speedy tracking and response times, so infection rates stay low and incidents remain localised.

3.20 Wholesale suppression strategies are avoided and intensive global efforts secure a vaccine and sufficient stockpiles are built to begin rollout to the 'at-risk' population group by the end of 2020. The economic impacts vary from the V-shape case in the following ways:

3.21 The longer containment period leaves confidence subdued for longer in 2020, resulting in weaker outcomes for consumer spending and business investment.

3.22 The impact of government mitigation polices has a fair amount of success. A tightening in credit conditions proves mild and short lived, while Sterling stabilises. However, due to the longer containment period there are more job losses and business insolvencies than the V-shape case.

3.23 The economic recovery is V-shaped but postponed until late 2020.

3.24 The relatively longer period of weakness results in greater scarring than the V Shape case.

Scenario 3: U Shaped Recovery

3.25 In this case, the timescales for addressing the pandemic threat are the same as the Delayed V-shape recovery case, but the economic impacts are more severe due to additional shocks arising from a tightening in credit conditions and further declines in Sterling. The suppression policy adopted is in line with the ICL's recommendations for 5 months of intensive action. Also, the timescales around securing a vaccine are at the midpoint of the range of the ICL's estimates of 12 to 18 months.

Scenario 4: L Shaped Recovery

3.26 The main difference between this and the U-shape case is that the scale of the credit crunch and Sterling decline is significantly deeper. The assumptions around the timescales for bringing the pandemic under control remain similar. In this case, as the economy emerges from the severe containment phase, it enters an extended period of stagnation/very subdued growth.

Consumer spending

3.27 Household spending growth slowed to an 8 year low of 1.2% in 2019. Consumer appetite for durables, property and, in particular, cars was notably muted. Low confidence was a major drag, but tepid growth in household incomes was also a factor behind the lacklustre spending trend. Despite another year of robust labour market conditions, with over 300,000 jobs created, incomes growth averaged a disappointing 1% in 2019. A pick-up in wage growth and receding inflation also provided a boost to earnings growth. However, this was offset by a continued squeeze in welfare benefits and other incomes sources. Looking ahead, prospects for incomes remain mixed. A positive is the very benign inflation backdrop. Combined with the boost to wages from more generous public sector pay and uprating to the National Living Wage, the recovery in real wages should remain intact over the coming year. However, this will be offset by a projected slowdown in the place of job creation to more sustainable levels. Another positive factor is the end of the freeze on working-age benefits, but the on-going roll out of other welfare reforms will continue to bite. Given this, real incomes is projected to average 1.3% this year and consumer spending growth will remain in sub-1.5% territory.

Retail

3.28 Retail sales volumes grew by 3% in 2019, the weakest reading since 2014. There was a marked slowdown in growth over the course of the year, reflecting low confidence and sluggish incomes. The weakening trend was concentrated in non-food stores, which started the year with growth above 4% and ended with declines not seen since early 2012. Department stores and household goods retailers bore the brunt, suffering from a fall in sales of durable goods. Demand for household goods has suffered as the housing market remained in the doldrums for a second year. In contrast, sales from predominantly on-line retailers picked up momentum with growth rising to 15%, compared with 10% in 2018. As a consequence, even before the advent of COVID-19, prospects for retail sales remained subdued. Household incomes gains were set to remain modest in 2020 although whilst the government's furlough scheme has been hugely ambitious, incomes since March 2020 have been impacted significantly with job losses becoming significant (as certain sectors experience extreme impact on how COVID-19 affects businesses).

Medium term outlook

3.29 The UK left the EU on January 31st 2020 and entered a transition period which allows continued access to the European single market while the next phase of negotiations take place. The transition period ends in December 2020, leaving a tight timetable for negotiating, amongst other things, a new trading relationship with the EU. Given this, there remains a real risk of another 'no deal' cliff edge as the transition deadline approaches (no doubt heightened by the impact of COVID-19). Experian's forecasts adopted in the quantitative assessment in this Study assume that this is avoided and a limited trade deal is struck. During 2021, the assumption is that negotiations are concluded for sectors not covered by the initial deals.

3.30 At the time of preparing this Study, there remains much uncertainty over what balance the government will strike on the trade-off between an agreement which minimises trade friction and the right to diverge from EU rules, which could lead to higher costs and reduced market access. The economic forecasts provided by Experian for use in this Study assume that the final outcome is a deep trade deal that allows continued access to EU markets. We continue to monitor progress and as the nature of the agreements become clearer we will adjust the baseline accordingly.

3.31 Experian's forecasts assume an orderly adjustment to the new trading environment. As Brexit related uncertainty ends, business investment should recover. However, the resultant increase in trade barriers will result in lower productivity and export performance than would have otherwise been the case.

3.32 Alongside this, Experian predict that fiscal policy will be more supportive than over the past decade. The baseline forecasts only incorporate announced policy so there is scope for upside from the March 2020 Budget. The government's increased majority should clear the path for it to push forward with policy priorities on regional development, infrastructure and health.

3.33 At the present time, Experian have not revised their projections for productivity and potential GDP growth, which drive the outlook over the medium/longer term. For the 2022-26 period overall, GDP growth is expected to average 1.8% per annum, compared with 2.0% during 2010 to 2018 and 2.6% from 1981 to 2007. Alongside this, the consumer spending outlook is little changed, forecast to average 1.8%, with retail sales averaging 2.7%.

Long term outlook

3.34 The final terms of the new economic relationship between the EU and the UK remains a major consideration for the long term outlook and Experian's assumptions on this front are little changed from previous years. The baseline forecasts assume that 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 in turn impacts the long term outlook for trade, investment and GDP.

3.35 Population is forecast to expand on average 0.3% per annum over 2030-2040, which is below the average of 0.8% observed during 2005-2016. Productivity growth is expected to recover from recent lows to 1.4%, but will be well below the 2.4% averaged in the decade preceding the last recession. Given this, our long term GDP growth forecast remains at around 1.7%, below the historic long-term trend growth of 2.3%.

3.36 Revisions to the consumer spending outlook are minimal, with long term growth forecast at 2.2%, underpinned by gains in population and household incomes. However, downside risks clearly exist from a more marked slowdown in EU migration than projected.

3.37 The expansion in comparison goods volumes, averaging 3% per head to 2040 will be similar to the preceding decade but less buoyant than historic trends as key factors that boosted growth, notably the globalisation that subdued audio visual prices significantly, will not be repeated to the same degree.

3.38 Per head spending on convenience goods has slowed sharply in the last couple of years. Experian project that growth will remain a modest 0.1% over the long term, which is weaker than experienced in recent years but an improvement on the historic trend of annual 1% declines during 2000-2019.

3.39 With regards to retail expenditure, it is useful to compare the forecast annual changes in spending per head on convenience and comparison goods from the time of the 2017 Study and this Update Study. Table 3.1 below shows the year-on-year change from Experian's Retail Planner Briefing Note 13[1] for 2017-2035, which was used for the 2017 Study, and compares this against the latest forecasts from

[1] October 2015

Experian's Retail Planner Briefing Note 18[2] for the same time period. Both sets of forecasts exclude spending via the internet except where spending is associated with physical stores[3].

3.40 Both sets of forecasts are similar in that they show no real growth in spending on convenience goods associated with 'bricks and mortar' stores. The latest forecasts are marginally more optimistic, led primarily by growth in 2017 and 2018 and the surge in convenience goods sales in 2020 (notwithstanding a forecast rebound in 2021).

Table 3.1: forecast year-on-year change in per capita convenience goods spending between 2017 and 2035

Year	2017 Study (%)	Update Study (%)
2017	0.1	1.4
2018	-0.1	0.6
2019	-0.1	-1.3
2020	-0.2	6.1
2021	-0.3	-5.3
2022	-0.3	0.2
2023	-0.1	-0.3
2024	0.0	-0.2
2025	-0.1	-0.1
2026	-0.1	-0.2
2027	-0.1	-0.2
2028	-0.1	-0.1
2029	-0.1	-0.1
2030	-0.1	-0.2
2031	-0.1	-0.1
2032	0.0	0.0
2033	0.0	0.0
2034	-0.1	0.0
2035	0.0	0.1
Change, 2017-2035	***-1.8%***	***+0.3%***

Source: Experian Retail Planner Briefing Notes 13 and 18

3.41 Table 3.2 undertakes a similar exercise for comparison goods per capita expenditure, using the same Experian Retail Planner Briefing Notes. Again, the data which is presented excludes spending via the internet which is not associated with 'bricks and mortar' stores.

[2] October 2020

[3] This adjustment is made as a large proportion of convenience goods retail sales is 'picked' from traditional large supermarkets rather than warehouses, the notable exception to this being Ocado

Table 3.2: forecast year-on-year change in per capita comparison goods spending between 2017 and 2035

Year	2017 Study (%)	Update Study (%)
2017	2.1	3.3
2018	1.8	2.0
2019	2.1	3.4
2020	2.5	-14.5
2021	3.1	8.1
2022	2.9	2.9
2023	3.4	2.7
2024	3.4	2.0
2025	3.2	1.9
2026	3.1	2.0
2027	3.3	2.1
2028	3.1	2.3
2029	3.3	2.4
2030	3.4	2.5
2031	3.3	2.5
2032	3.5	2.5
2033	3.5	2.6
2034	3.3	2.6
2035	3.6	2.7
Change, 2017-2035	***+57.9%***	***+36.0%***

Source: Experian Retail Planner Briefing Notes 13 and 18

3.42 The above data shows a material change in the level of forecast growth in per capita comparison goods expenditure over the period 2017-2035. Growth between 2017 and 2019 was better than expected, although the main two drivers of the lower levels of forecast growth are the impact of COVID-19 during 2020 and also a generally lower level of annual growth in the medium to longer term. Overall, the level of growth between 2017 and 2035 is now forecast to be one third lower than at the time of the 2017 Study. This will have implications for the updated quantitative need forecasts which is explored in further detail in the next section of this report.

Retail and Town Centre Trends

Internet Shopping

3.43 One of the key trends that has impacted on the retail sector and shopping patterns over the last decade has been the growth in internet shopping, which forms part of the definition known as 'special forms of trading' ('SFT'). Based on ONS data, Experian estimate that:

- The value of internet sales in 2019 was estimated to be £84.1bn (at current prices). This represents a +45% increase from £58bn recorded in 2016. Total non-store retail sales are estimated to amount to some £90.7bn in 2019 and is set to £203bn in 2036.

- To explain the differential in terms of growth between all retailing and internet retailing, in 2019 overall retail growth was 3% whereas internet sales grew by 9.6%. In 2020, overall retail sales are expected to grow by 2.5% whereas internet sales are likely to increase by 7.9%.
- The overall market share of internet sales, as a proportion of total retail sales, has increased nationally from 5.5% in 2006 to 20.2% in 2019. It is forecast by Experian to grow to 22% by 2021 and to 31% by 2036.

3.44 In relation to on-line grocery sales, most of the main national grocery businesses (apart from ALDI and Lidl) provide a delivery service, with Marks & Spencer recently entering the market in collaboration with Ocado. The entrance of Ocado to the online market in 2002 made a big impact upon the strategies of the traditional 'big four' grocers and led them accelerate plans for the online channel. Ocado has a different type of operation to the traditional grocers whereby its orders are picked from warehouses (via robotics) whereas most orders from Tesco, ASDA, Waitrose etc are picked by staff in-store. The Ocado business model is very efficient but expensive to invest in initially. The in-store grocery picking system is less costly initially but is generally regarded as a loss-maker.

3.45 In 2020 two particular factors have had a key influence on on-line grocery sales. The impact of COVID-19 meant that many people were reluctant to visit shops and the experience of using foodstore, particularly in the first part of 'lockdown' become inefficient and time-intensive. This led to a significantly higher demand for on-line deliveries which the main grocers found it difficult to keep pace with. However, now that the initial shock has passed, grocers are trying to build in additional capacity and online sales have risen from 7% of the total grocery market at the start of 2020 to 13% by May 2020. Research by UBS in the UK found that 71% of those surveyed will shop as often or more after the COVID-19 situation improves.

3.46 The other development in 2020 has been the decision by Amazon to start offering free grocery deliveries to its Prime members. Amazon's grocery offering is sourced from a range of sources including Morrisons, Booths and Whole Foods and is, in due course, likely to add capacity to the delivery network particularly in urban areas. Whilst Amazon customers are paying indirectly for the delivery service, this move does mirror Ocado's entrance into the market although the latter did subsequently introduce charges in line with the other traditional grocery retailers.

3.47 The impact of COVID-19 has been even more significant for non-food shopping. Whilst a small amount of stores (classified as essential) remained open (under very strict controls) there has been a very significant shift to on-line sales, albeit subdued due to the furlough scheme and the risk of job losses. Initial data suggests that the initial spike will reduce as physical stores re-open although many commentators consider that the upwards trend in online sales is likely to be reinforced by the impact of COVID-19.

Changing Retailer Requirements

3.48 The economic downturn, the growth in internet shopping and the continued demand for out-of-centre shopping has resulted in national retailers reviewing and rapidly adapting their business strategies over the past several years, including new store requirements and existing store formats to keep pace with the dynamic changes in the sector and consumer demand.

3.49 This is probably best illustrated by the changes in the grocery sector over the last 6-7 years. Following a sustained period of growth over almost 20 years up to 2009/10, principally driven by new store openings, the focus for the main grocery operators (i.e. Tesco, Sainsbury's, Asda, Waitrose and Morrisons) shifted earlier this decade to growing market share through opening new smaller convenience store formats (such as Tesco Express, Sainsbury's Local and Little Waitrose), a better customer experience and online sales. In relation to online sales, following the original entrants into the market (Tesco, Ocado, Sainsburys and ASDA), Morrisons joined a few years ago and Marks & Spencer will start their own sales (in partnership with Ocado) in September 2020.

3.50 Over the past several years applications for large store formats have slowed to a virtual standstill and in some cases permissions are not being built out. At the other end of the grocery spectrum, the European-led 'deep discount' food operators (namely Aldi and Lidl) are increasing their market shares through new store openings across the UK. Iceland are also expanding their Food Warehouse format.

3.51 In the non-food sector, those retailers that experienced significant growth up to 2007/08 have had to adapt to the very different market conditions over the past dozen or so years. The retailers that have not been flexible enough to respond to changing consumer needs, or are being squeezed in the increasingly competitive 'middle ground' between high-end and value retailing, have largely struggled to maintain market share. In some cases, this has resulted in a series of high profile 'casualties' and a number of key retailers have either disappeared from our high streets altogether, or have significantly reduced their store portfolio in centres across the UK (e.g. Debenhams, House of Fraser and Marks & Spencer).

3.52 Research also shows that there is an increasing polarisation and concentration of retailer demand and investment interest in the larger regional and sub-regional centres (i.e. the 'top 25-50' UK centres as defined by Javelin VenueScore rankings). This is because these centres usually have large and established catchment areas, and therefore represent less 'risky' investments in the current uncertain economic climate. These larger centres have also generally benefitted from recent new shopping centre development and investment over the last decade, and are therefore better placed than smaller and medium sized centres to accommodate retailers' requirements for modern larger format units. At the same time, retailer and investment demand is also mainly focussed on the prime retail pitches, with the secondary and tertiary pitches contracting and deteriorating in some centres due to limited demand, smaller shop units and increasing vacancies. The continuation of these trends will impact on future operator requirements, with retailers looking to satisfy their demand for larger modern premises in prime shopping locations, with strong catchment areas and a good supply of appropriate retail space.

3.53 Furthermore, many of the major multiples and traditional high street retailers are changing their store formats and locational requirements. For example, key anchor retailers such as Boots, Next, TK Maxx, John Lewis and Marks & Spencer have been seeking larger out of centre format units to showcase their full product range and to provide an exciting shopper environment backed by the latest (digital) technology.

3.54 As a result, it is the larger centres and out-of-centre retail parks that are often best placed to meet this demand; as larger units are difficult to accommodate within existing traditional high streets and town centres, particularly historic areas characterised by conservation areas and listed buildings. As a result, some traditional high street retailers are moving out of town centres to retail parks. For example, over recent years Marks & Spencer has closed a number of traditional variety stores on high streets and opened new M&S Simply Food stores in out-of-centre locations. M&S has also recently announced a further wave store closures. This further underlines the growing demand from multiple retailers for larger format shop units, and the need for town centres to provide a good mix of large modern units to help attract and retain high street retailers, or potentially risk their relocation to new competing shopping destinations as and when leases expire.

3.55 The on-going challenging environment facing the comparison goods sector has been exacerbated by the impact of the COVID-19 pandemic and the lockdown periods imposed in March and November 2020. Many comparison goods stores were classified as non-essential shops and have only recently re-opened. Whilst a significant element of sales transferred on-line (to those retailers who had a good online sales platform) overall sales have been affected considerably. Data for July 2020 indicates that some retailers experienced a good initial 'bounce' back, although the second lockdown (and subsequent new 'tiers' in December) will no doubt lead to a reversal in fortunes for many businesses. In addition, the experience surrounding comparison goods shopping trips, which were until recently taken as a quasi-leisure activity, has fundamentally changed which, in the short term, is likely to impact upon the attractiveness of town centres.

3.56 These changes in retailer requirements and market demand will continue to have a significant impact on the UK's town centres and high streets, particularly in those cases where retailers make the decision to relocate from town centres to out-of-centre locations, or even out of the area altogether.

3.57 A further factor to consider in relation to the future health of town centres is the amount of 'daytime population'. A number of the larger centres, particularly Norwich city centre, have historically benefited from retail expenditure associated with workers (i.e. office workers and works in commercial premises). This has helped to sustain a number of businesses, although the impact of the COVID-19 pandemic will have had a severe effect upon this source of expenditure. Whilst there are hopes that a greater amount of the workforce can return to 'town centres' in 2021, it would appear that pre-2020 working arrangements are unlikely to return and, as a consequence, this is likely to a further source of pressure on 'town centres' going forwards.

4. Updated Assessment of Need for Retail Floorspace

Introduction

4.1 Section 8 of the 2017 Study, supported by appendices I and II in Volume 3, outlined a series of quantitative forecasts for the main settlements in the Greater Norwich area. The forecasts were split between the main settlements across the three different local authority areas and provided separate estimates for convenience and comparison goods Class A1 retail floorspace. As part of AY's instructions from the client for this Study, the previous forecasts have been updated and this section outlines, first, the basis for the updated forecasts, and then the results of the updated assessment.

Basis for the Updated Quantitative Forecasts

4.2 This sub-section of the Study outlines the various data sources and assumptions which have been adopted in order to prepare our quantitative need forecasts. Quantitative need is conventionally measured as expenditure capacity, i.e. the balance between the turnover capacity of existing facilities and available expenditure in any given area. Expenditure capacity, or 'quantitative need' can arise as a result of forecast expenditure growth (either through population growth or increases in spending), or by identification of an imbalance between the existing facilities and current level of expenditure available in an area.

4.3 Quantitative capacity forecasts are reliant on a series of data sources which are regularly updated in response to various factors including UK economic forecasts and the performance of retailers. The section covers the following areas:

- Study area
- Population data
- Per capita retail expenditure forecasts
- Data on shopping patterns for convenience and comparison goods shopping
- Commitments for retail floorspace
- Floorspace efficiency levels
- Benchmark turnover levels of existing and committed retail floorspace
- The timeframe for the assessment and the use of the quantitative capacity forecasts

Study Area and Shopping Patterns Data

4.4 Given the scale of the Greater Norwich plan area, along with its wider catchment, the study area for this assessment is required to be necessarily large. The study area will need to capture shopping patterns associated with each of the main town centres and the average spending levels of those people who use these centres. A plan showing the extent of the study area and the constituent sub-zones is contained at Appendix I.

4.5 In order to inform the 2017 Study, a survey of household shopping patterns was undertaken in order to inform both this quantitative assessment and the town centre health checks. That survey was structured to collect data on the following convenience and comparison shopping activities:

- First choice and other main food shopping destinations
- Main top-up food shopping destinations
- Shopping destinations for the following types of comparison goods:
    - Clothing and fashion goods (first and second choice locations)
    - Furniture, floorcoverings and household textiles
    - DIY goods
    - Domestic appliances
    - Smaller electrical goods
    - Health and beauty goods
    - Recreational and luxury goods

4.6 It has been agreed with the Client that the results of the 2017 Study household survey would continue to be utilised in this updated assessment. As a consequence, the same study area, and constituent zones, will continue to be adopted.

4.7 The results of the household survey have been weighted against the age profile of each individual zone and have been summarised in Table 4 at Appendix II (for convenience goods shopping) and Table 4 at Appendix II (for comparison goods shopping).

4.8 For the purposes of our updated assessment, internet shopping, ‘don’t know’ and ‘don’t do’ responses have been removed from the results and the market share data re-based. This matches the previous assessment.

Timeframe for the Quantitative Assessment

4.9 The timeframe for the new Greater Norwich Local Plan has been set to conclude by 2038 and therefore our previous assessment has been updated to run from the current year 2020 until 2038. In line with the approach of the 2017 Study, interim assessment years are provided, which are now set at 2025, 2030 and 2035.

4.10 The February 2019 version of the NPPF indicates that local authorities should "allocate a range of suitable sites in town centres to meet the scale and type of development likely to be needed, <u>looking at least ten years ahead</u>". The PPG also notes, in relation to the preparation of town centre strategies, that *"Given the uncertainty in forecasting long-term retail trends and consumer behaviour, this assessment may need to focus on a limited period (such as the next five years) but will also need to take the lifetime of the plan into account and be regularly reviewed"*.

4.11 Therefore, there is no compulsory requirement for this quantitative assessment to run all the way to 2038 although we have done so in order to provide some broad informal guidance.

4.12 However, it should be noted when absorbing the content of our quantitative assessment that the forecasts will become less reliable over time due to nature of the economic forecasts which will be influenced by external factors some of which will be unforeseen. As a consequence, we would recommend that the first five years of the assessment is the focus for the retail strategy (i.e. up to 2025) and that the forecasts are reviewed every five years. The 2035 and 2036 forecasts are, therefore, indicative.

Population

4.13 In line with the approach taken in the 2017 Study, our quantitative need assessment adopts population forecasts provided by Experian.

4.14 Population levels for each of the study area zones are shown in Table 1 at Appendix II (convenience goods) and Table 1 at Appendix III (comparison goods).

4.15 Given the current issues surrounding the use of housing need / population forecasts, our updated assessment continues to adopt the base data from the 2017 Study[4], rolled forward to 2020, 2025, 2030, 2035 and 2038. However, these forecasts may need to be updated in the future as the Client moves forward with the preparation of the Local Plan.

[4] Which were based upon 2014 sub-national ONS population projections

Per Capita Retail Expenditure Data and Future Forecasts

4.16 New per capita retail expenditure data has been obtained from Experian. The data provided is set at a 2018 base level and has been projected forward based upon the forecast change in per capita retail expenditure for convenience and comparison goods is based upon advice within Experian's Retail Planner Briefing Note 18, published in October 2020.

4.17 These forecasts from Experian take into account, at the time of finalising this report, the latest available data on the potential implications of the COVID-19 pandemic on the retail sector. However, given the unique and severe effects of the pandemic, we would recommend that

4.18 Per capita retail expenditure for convenience and comparison goods is shown in Table 2 at Appendix II (convenience goods) and Table 2 at Appendix III (comparison goods).

4.19 As part of the adopted forecasts, we have used the latest data from Experian in terms of special forms of trading (i.e. internet shopping). Whilst the latest forecasts from Experian suggest a modest 'bounce back' from 2021 onwards once economic conditions become, hopefully, more settled, the forecasts nevertheless show a sustained increase in spending via the internet, particularly for comparison goods. As a consequence, this will have an impact upon the level of available expenditure to 'bricks and mortar' stores across the Greater Norwich area (although our assessment does, like the 2017 Study, take into account internet sales associated with traditional retail stores).

4.20 It is to be noted that the 2017 Study provided two alternative scenarios for the market share of internet shopping for comparison goods. The first scenario adopted national average market share levels provided by Experian's latest forecasts at that time. The second scenario adopted local market share levels derived from the household survey commissioned to inform the 2017 Study. The results of that survey indicated a much higher level of market share for comparison goods shopping via the internet. The average market share for comparison goods shopping across the whole of the study area was 25.3%, which could be compared with the national average of 13.8%. This is a significant difference and, in our experience, is not unusual for large study areas which have a large rural element and was the correct approach to take in the 2017 Study.

4.21 For the purposes of our updated assessment, a decision needs to be made in relation to how the issue of internet shopping is approached. The latest data published by Experian in October 2020 indicates that the national average market share for comparison goods shopping has risen to 22.9% (which is an adjusted figure taking into account sales via physical stores). This is a circa 4.4% increase over 2019 levels and significantly above the level adopted in the 2017 Study. A key issue to consider is whether there has been a similar proportionate rise in local market share levels since the 2017 Study. One factor to consider is whether the high level of local market share observed by the 2017 Study was primarily a product of the characteristics of the study area and the impact of the COVID-19 pandemic in 2020 will have had less of an effect in the Greater Norwich area as local residents already had a high propensity for shopping via the internet (due to, for example, the distance to, and availability of, a wide range of comparison goods shops). In the absence of any alternative local data, we have adopted Experian's latest forecasts as the basis for our assessment, which show the share of shopping for comparison goods via the internet rising from 22.9% in 2020 to 24.6% in 2025 and 26.9% in 2030.

Commitments

4.22 Data on relevant Class A1 convenience and comparison goods retail commitments has been obtained from the Councils and are shown in Table 6 at Appendix II (convenience goods) and Table 6 at Appendix III (comparison goods).

4.23 Given the decision to continue to use the results of the 2017 household survey, the commitments adopted in appendices II and III comprise a mixture of stores/floorspace which has commenced trading since the completion of the 2017 Study and also currently unimplemented but extant planning permissions.

4.24 Aside from the 'commitments' included in the latest analysis, it is notable that a planning permission (17/00394) for a large retail park on land to the south of Sweet Briar Retail Park has now lapsed, although there is a current undetermined planning application (20/00633) on the same site for circa 7,400sq m gross comparison goods floorspace, along with some leisure uses. Given that this is an undetermined application, it has not been included in the analysis but, if permitted, would have a material impact upon the capacity figures outlined later in this document.

4.25 Finally, it should also be to noted that the Secretary of State has recently refused planning permission for the redevelopment of Anglia Square district centre, a proposal which would have provided 1,250 dwellings, 11,000sq m of flexible retail/commercial space, a replacement cinema, a multi-storey car park and a hotel.

Benchmark Turnover Levels

4.26 Within the 2017 Study two different approaches were taken for benchmark turnover levels for the convenience and comparison goods assessments. For convenience goods floorspace, it is common for the benchmark turnover of a selection of existing floorspace to be calculated using the existing net floorspace and company average sales densities for individual national multiple retailers and an assumed average for other convenience goods floorspace in defined 'town centres' and elsewhere. We remain with this approach in this Study and have:

- updated the sales density information for named national multiple retailers using the latest research undertaken by GlobalData and Mintel[5]; and
- including data on new store openings since the previous studies.

4.27 Our approach to the comparison goods assessment is explained later in this section.

Floorspace Efficiency

4.28 Finally, our convenience and comparison goods capacity assessments both make an allowance for changes in floorspace efficiency over the assessment period. The assumptions that have been made are taken from recommendations made by Experian in its Retail Planner Briefing Note (Note 18, October 2020).

Basis for quantitative capacity forecasts

4.29 For the avoidance of doubt, the quantitative capacity forecasts outlined in this section are for the whole of each town, not just town centres.

4.30 We now turn to the assessment of need for each of the main settlements.

Updated Forecasts

Convenience goods quantitative capacity

4.31 Table 8 at Appendix II outlines the quantitative capacity for convenience goods floorspace for the Norwich urban area, which takes into account not only the city council administrative area but also those parts of Norwich which fall within Broadland and South Norfolk. A comparison between the previous analysis in the 2017 Study reveals that there has been increase in the level of forecast spending in stores in Norwich between 2017 and 2020 (from £490.1m to £523.6m) although there is a forecast reduction between 2020 and 2025. Benchmark turnover levels have also reduced for the main stores included in the assessment, leading to a reasonably large difference between actual turnover and benchmark turnover levels. However, the majority of this difference is taken up by the turnover associated with recently opened stores (since the completion of the survey informing the 2017 Study)

[5] Retail Rankings

and other unimplemented commitments (£85.8m at 2020). This leads to a small level of surplus convenience goods expenditure of £6.4m at 2025 rising to £14.8m at 2030.

4.32 These levels of 'surplus' expenditure are equivalent to a floorspace capacity of 600sq m net at 2025, rising to 1,300sq m net at 2030.

Table 4.1: Convenience goods floorspace quantitative capacity for Norwich urban area

	2025 (sq.m net)	**2030 (sq.m net)**	***2035* (sq.m net)***	***2038* (sq.m net)***
Norwich urban area convenience goods requirement	600	1,300	*2,500*	*3,000*

*Source: Table 8 *indicative only, should be subject to review*

4.33 Therefore, whilst the forecast quantitative capacity levels have changed from 'negative' to 'positive', the level of 'surplus' is so small that it does not prompt any significant allocations from a quantitative perspective. However, as noted in the 2017 Study, there may be qualitative reasons to provide for new convenience floorspace, which could be based upon spatial considerations in order to provide easy day-to-day access to convenience retail provision.

4.34 Table 4.2 outlines the updated quantitative convenience goods capacity forecasts for South Norfolk. It outlines the total capacity for South Norfolk (outside of the Norwich urban area) and then breaks this down into the three main settlements plus the remainder of the rural area in the District.

Table 8.7: Convenience goods floorspace quantitative capacity for South Norfolk

	2025 (sq.m net)	**2030 (sq.m net)**	**2035* (sq.m net)**	**2038* (sq.m net)**
South Norfolk Main Towns / Rural Area convenience goods requirement	2,900	3,300	*3,800*	*3,900*
Of which, Diss	2,300	2,400	*2,700*	*2,700*
Of which, Harleston	-500	-500	*-500*	*-500*
Of which, Wymondham	100	200	*400*	*400*
Of which, Rural Centres / Other	1,100	1,100	*1,200*	*1,300*

*Source: Tables 9a-9e, Appendix II *indicative only, should be subject to review*

4.35 In relation to the overall combined town and rural area capacity, the latest forecasts for South Norfolk in the short to medium term are not substantially different to the forecasts in the 2017 Study. 'Surplus' capacity in the short term has fallen slightly from 3,400sq m net in 2022 to 2,900sq m net in 2025. Looking ahead, capacity has also fallen slightly from 3,700sq m net in 2027 to 3,300sq m net in 2030.

4.36 In relation to the individual areas:

- Diss. There has been very little change in the quantitative forecasts. Forecast capacity at 2022 in the 2017 Study was at 2,300sq m net and this remains the same for 2025 in the latest assessment. By 2030, forecast capacity is at 2,400sq m net, which is slightly lower than the 2027 prediction of 2,500sq m net in the 2017 Study.
- Harleston. It remains the case that there is a small over-supply of convenience goods floorspace in Harleston over the assessment. The forecast over-supply has grown slightly between the two studies but not any material extent.
- Wymondham. The small level of forecast 'surplus' expenditure within Wymondham remains, although it has been reduced between the 2017 Study and the latest assessment. The latest forecasts indicate 100sq m net at 2025, rising to around 200sq m net at 2030.
- Rural Centres. Finally, estimates of expenditure capacity for the rural areas of South Norfolk have also remained reasonably static. In the 2017 Study, the forecast capacity was equivalent to around 1,200sq m net at 2022 and this has fallen very slightly to 1,100sq m net in 2025.

4.37 Within Broadland, outside of the Norwich urban area, Tables 10a-10c at Appendix II provide the following latest forecasts:

Table 4.3: Convenience goods floorspace 'need' for Broadland (baseline forecast)

	2025 (sq.m net)	2030 (sq.m net)	2035* (sq.m net)	2038* (sq.m net)
Broadland Main Towns / Rural Area convenience goods requirement	400	500	*600*	*600*
Of which, Aylsham	-500	-400	*-400*	*-400*
Of which, Rural Centres / Other	900	900	*900*	*1,000*

*Source: Tables 10a-10c, Appendix II *indicative only, should be subject to review*

4.38 Table 4.3 above, when compared to the results of the 2017 Study, show a small reduction in the overall level of quantitative capacity for convenience goods floorspace. In the 2017 Study, the forecast capacity was 700sq m net at 2022, with a drop to 400sq m net at 2025 in the latest assessment. This reduction continues in the medium term, falling from 800sq m net at 2027 (in the 2017 Study) to 500sq m net in the latest assessment.

4.39 With regards to Alysham, the small over-supply has increased from -100sq m net in 2022 (from the 2017 Study) to -500sq m net at 2025 (in the latest assessment). The changes in the overall Broadland area capacity are due to Alysham as the separate rural area forecasts have remained the same at 900sq m net during the short to medium term.

Comparison goods quantitative capacity

4.40 Appendix III outlines the updated forecasts for comparison goods expenditure / floorspace across the three main geographic areas: the Norwich urban area, rural South Norfolk and rural Broadland. This follows the same format as the 2017 Study.

4.41 Whilst it has been decided, for the purposes of this update, not to provide alternative scenarios in terms of the market share of internet shopping, there is nevertheless a need to consider the impact of changing retail expenditure levels and economic forecasts on the amount of expenditure which is available to 'bricks and mortar' stores in the Greater Norwich area. In this regard, there are three areas to consider:

- Changes in the level of per capita spending on comparison goods;
- The potential for change in per capita expenditure levels, particularly in light of the COVID-19 pandemic and on-going effects on the UK economy; and
- The significant recent increase in the market share (nationally) of shopping via the internet.

4.42 A comparison between the 2017 Study and the latest assessment reveals that the amount of available comparison goods expenditure in the study area was £2,751m in 2017, whereas the latest assessment for 2020 is £2,195m. This is a significant fall and is caused by the drop in expenditure levels during 2020 and also the increase in the market share of internet shopping over the past three years (both of which heavily influenced by the COVID-19 pandemic). Whilst it is hoped that there will be a bounce-back from 2021 onwards, lower levels of growth and internet shopping will mean that levels of available comparison goods expenditure will be materially lower over the assessment period.

4.43 As a consequence, this has a knock-on effect on the forecast turnover of existing stores and centres. For example, in the 2017 Study, it was forecast that total spending at comparison goods stores in the Greater Norwich urban area (in 2017) was £1,547m. Based upon the above changes, the forecast turnover has fallen to £1,233m in 2020.

4.44 In light of these changes, consideration must be given to the approach which should be taken to forecasting future expenditure / floorspace capacity in the Greater Norwich area. Within the 2017 Study, benchmark turnover levels at the base year of the assessment were set to match turnover levels (i.e. £1,547m). This is common practice but to do the same in the latest assessment would drop benchmark turnover levels to £1,233m at 2020. This would suggest that it would be reasonable to lower comparison goods benchmark turnover levels across the Greater Norwich urban area by circa £300m between 2017 and 2020. This would seem counter-intuitive in the context of falling levels of available expenditure and the various issues faced by the UK's shops and high streets over the past year. Therefore, in order to understand the implications of remaining with the previous benchmark or 're-setting' the benchmark back to 2020 turnover levels.

4.45 Table 7a at Appendix II re-sets the benchmark turnover level for all stores in the Greater Norwich area to match the latest forecast actual turnover for these stores at 2020 (£1,233.7m). Taking into account forecast growth in available expenditure, making an allowance for changes in floorspace efficiency amongst existing floorspace and also a constant market share over the assessment period, then Table 7a indicates that 'surplus' capacity remains relatively constant over the assessment, not rising above initial 2025 levels. It will be noted that the initial 2025 level of 18,100sq m net is reasonably significant and is a result of the 'bounce-back' in consumer spending in 2021 and the issues faced by floorspace efficiency during 2020 and 2021. In our opinion, this leads to an artificially high level of initial capacity which should be recycled in order to support existing stores.

4.46 Moreover, when considering the above capacity figures for the Norwich urban area it must be acknowledged that since the completion of the 2017 Study there have been the closure of a number of comparison goods retailers in Norwich, including BHS, Matalan, Mothercare and Toys R Us. These units provide a large amount of available comparison goods floorspace which is capable of accommodating new tenants. As a consequence, this will significantly reduce the need to plan for any net increase in comparison goods floorspace provision in Norwich over the new Local Plan period. In any event, the amount of potential 'surplus' expenditure by 2030 in the latest assessment is likely to be well below the level previously forecast in the 2017 Study.

4.47 The alternative capacity scenario for the Greater Norwich urban area is set out in Table 7b at Appendix III. This scenario retains the previous (2017) benchmark turnover level and shows an over-supply of comparison goods floorspace of between -21,100sq m net and -25,500sq m net between 2025 and 2030. This over-supply is driven by the fall in available comparison goods expenditure and indicates that the short-fall should be used to support existing floorspace, including the opportunity to re-occupy existing vacant floorspace (unless it is re-purposed for an alternative use).

4.48 This alternative capacity scenario is, for the avoidance of doubt, our preferred approach to the assessment of floorspace capacity in the Norwich urban area. In particular, there is need to take into account and acknowledge the drop in available comparison goods expenditure over recent years and, when on-going trends in the retail sector are taken into account, conclude that the strategy for retail floorspace should be on supporting existing floorspace and allow it to adapt to changing market conditions. The negative capacity figures shown in Table 7b should not be seen as prediction that the Norwich urban area will automatically lose circa 20,000sq m of net sales floorspace over the life of the new Local Plan as different retailers will react to changing economic conditions in different ways. Some of the alternative potential scenarios are that: (A) due to the material drop in available expenditure, it is possible that some comparison goods retailers will decide to close; (B) some will not close, but decide to reduce that floorspace in order to re-size to fit customer demand and product ranges; or (C) there will be no change for some retailers as they decide to remain with their existing space and simply trade at a lower sales density level.

4.49 A similar outcome can be found for rural South Norfolk and rural Broadland areas, with: (A) a modest amount of surplus capacity shown in Table 7a (which matches current benchmark to current forecast turnover levels) albeit around half of previously forecast levels. If the alternative scenario, in Table 7b, is adopted then a small over-supply across both areas is forecast.

Implications for the Assessment of Overall Need

4.50 The updated quantitative capacity analysis, along with the analysis in the earlier sections of this report, provide a number of important implications for the direction of travel in relation to the retail land use strategy for the new Greater Norwich Local Plan. Whilst there are a number of equally important factors which will influence the retail and town centres strategy in the new Local Plan, it is important to start with the updated economic and quantitative forecasts.

- Whilst the 2017 Study did test two alternative scenarios in terms of the market share of internet shopping - (A) the on-going trend for increases in spending via the internet; and (B) the significant effects as a consequence of the COVID-19 pandemic – have had a large impact upon the amount of forecast available expenditure to ‘bricks and mortar’ stores, particularly in the Norwich urban area.

- The COVID-19 pandemic is also having an effect on future expenditure growth forecasts, leading to much lower levels of available expenditure in the future.
- The result is a materially different set of circumstances to the 2017 Study, which suggests that there is clear case for significant retail floorspace allocations across the Greater Norwich area, particularly for comparison goods floorspace.

4.51 The above is supported by commercial market conditions. The challenges facing the retail were apparent before the advent of the pandemic, including the decisions of a number of retailers to down-size their portfolio due (A) increasing levels of competition from the internet and discount retailers; and (B) a decision to concentrate upon larger town and city centres. These have now been exacerbated in 2020 with retailers focusing upon their existing portfolio, with a number of national multiple retailer causalities. Therefore, any suggestion of a growing quantitative expenditure demand in a particular area may not be matched by commercial market demand. This is reinforced by a number of vacant units in Norwich which have the potential to accommodate new tenants prior to the need to develop net additional floorspace.

4.52 This position is also reinforced by the on-going competition for defined 'town centres' posed by out of centre retail floorspace. This has been an on-going trend over the past several years in many larger towns and cities, and whilst the current 'squeeze' on available retail expenditure will hit all retailers to varying extents, it will further exacerbate the pressure on town centres. Whilst a new survey of household shopping patterns has not been undertaken for the purposes of this Study, the drop in available expenditure and the lack of identified quantitative need for net additional retail floorspace indicates that significant protection must be offered to town centres when (A) drafting planning policies for the new Local Plan; and (B) when determining planning applications for retail and leisure uses located outside of the defined 'town centres'. This issue is explored further later in this report.

4.53 Finally, the recent changes in national planning policy also acknowledge the changing contribution of traditional Class A1 retail floorspace/uses to town centres. This is also explored in the next section of this document, but it is clear that retail uses, whilst remaining important to town centres, are now one of a wider suite of land uses required to maintain and enhance town centre health.

4.54 There result of the above is that there is now no obvious basis for an 'in principle' allocation of land for net additional retail uses across the Greater Norwich Local Plan area. However, this should not exclude the ability of the new Local Plan to encourage new provision in certain circumstances. For example, identification of any sites / locations which include retail development are likely to be directed to a suite of specific matters:

- Projects to support town centre health. Given the on-going challenges facing the high street nationally and forecast drop in available expenditure to support existing retail floorspace in the Greater Norwich area, projects involving retail floorspace provision are likely to be driven towards qualitative improvements which could involve a combination of: (A) redevelopment of existing space in order to provide replacement retail floorspace which is suited to the modern needs of the retail sector; (B) re-purpose sites with existing floorspace in order to allow for a wider range of active land uses to maintain and enhance town centre health (including, in appropriate circumstances, the down-sizing of retail space).
- Location specific needs. There will also be circumstances where quantitative and qualitative considerations point to a specific location. In many circumstances in large urban areas, such as Norwich, this is likely to be in relation to new communities / urban extensions where there is a need to ensure that local communities have easy access to day to day retail and service uses. This provision will be guided through appropriate development plan allocations and development management decisions and the framework for assessing the need for such provision is discussed in more detail in the next section of this report.

5. Policy Advice

5.1 It has been agreed with the Client that this Update Study will provide advice on planning policy / strategy in relation to the following areas:

- advice on whether there is a requirement for an revisions / updates to retail and town centre planning policies in the existing JCS and the development management plans in the three local authorities (which are planned to remain in force alongside the adoption of the Greater Norwich Local Plan).
- advice on the implications of the new Use Class E
- advice on the designation of new local centres as part of planned new large scale residential-led mixed use developments.

5.2 Our advice in relation to each area is outlined below.

Review of Existing Retail and Town Centre Planning Policies

5.3 Appendix 4 of the Regulation 18 Local Plan consultation outlines the intended approach regarding existing development plan documents to be superseded and those which are intended to be retained. The development plan documents to be superseded are:

- The Joint Core Strategy for Broadland, Norwich and South Norfolk (2011 and subsequently readopted 2014)
- Broadland Site Allocations Development Plan Document (2016)
- Norwich Site Allocations and Site-Specific Policies Local Plan Document (2014)
- South Norfolk Local Plan Site Specific Allocations and Policies Document (2015)

5.4 The documents which are intended to be carried forward are:

- Old Catton, Sprowston, Rackheath & Thorpe St Andrew Growth Triangle Area Action Plan (2016)
- Long Stratton Area Action Plan (2016)
- Wymondham Area Action Plan (2015)
- Broadland Development Management Policies Document (2015)
- Norwich Development Management Policies Document (2015)
- South Norfolk Development Management Policies Document (2015)

5.5 Concentrating upon development management policies involving retail land uses and the approach to town centre health, we make the following observations:

- 2011 JCS (as amended in 2014). The latest version of the adopted JCS contains numerous references to the role that retail land uses play in support local communities across all of the main settlements in the Greater Norwich area. However, it does not provide any strategic policies regarding the preferred locations of retail development or the information and analysis which must be provided for certain proposals located outside of define 'town centres'. Instead, policies in the three development management plans deal with these issues, although they will require their own updates (see below for more information).
- Norwich development management policies plan. There are three main retail and town centre related policies in the adopted Norwich DM policies document: DM18, DM20 and DM21:
  - DM18. This policy outlines the overall approach to retail, leisure and other main town centre uses. It explains the criteria which should be met in relation to proposals located within the defined 'town centres'[6] and the approach which should be taken in relation to the assessment of proposals for main town centre uses located outside of defined centres. Overall, DM18 continues to broadly reflect current national planning policy on town centres and main town centre uses although we would recommend that the following refinements are considered by the Client:
    - — making it clear that, where circumstances dictate, the sequential test applies to all main town centre uses.
    - — in line with the latest version of the NPPF impact assessments for proposals which meet the floorspace threshold should not only apply to retail and leisure proposals[7].
    - — when considering the sequential test, reference should be made to the need to apply flexibility in terms of scale and format.
    - — when assessing the impact of retail and leisure proposals, cumulative impact assessments will need to be undertaken where there are existing commitments.
  - DM20. This policy outlines the approach to assessing development proposals within the primary and secondary retail areas, plus large district centres. The criteria within DM20 mixes quantitative and qualitative considerations, including the balance between former Class A1

[6] city centre, district centres and local centres
[7] with regards to the assessment of the likely impact of retail and leisure proposals, the contents of this report indicate the pressures that existing retail store are facing in terms of available retail expenditure levels. As a consequence, we would strongly recommend that the local authorities require a detailed assessment of town centre health and the likely impact on the health of, and investment within, defined 'town centres' for all relevant retail and leisure proposals. In certain instances, this may require new and additional evidence base data on shopping and leisure patterns in order to provide for a robust impact assessment.

uses and former Class A2/3/4/5 uses and other main town centre uses. The operation of this policy will be affected by the introduction of the new Use Class E and, in any event, the aspiration to try and maintain a minimum proportion of former Class A uses in the defined areas is now looking out of date for the following reasons:

— recent changes to national policy mean that whilst the need to refine town centres and primary shopping areas remains, retail frontages no longer need to be defined and there is a direction of travel away from assuming that former Class A1 retail uses are the only sector to underpin town centre health.

— even before the changes to national planning policy, the use of quantitative thresholds within town centre development management policies was becoming a blunt instrument. Justifying a particular level of (former) Class A1 retail units was prone with difficulties and could lead to unintended consequences. Notwithstanding the implications of Use Class E (as outlined above and below), we consider that a move towards more qualitative assessment factors would now be more appropriate, focusing upon the character of the proposed use, its contribution to active street frontages, it contribution to the overall health of the centre.

— as a consequence of the above, Policy DM20 is, in our opinion, now looking a little out of date in certain areas and there is merit in considering an updated version in the Greater Norwich Local Plan.

- DM21. Policy DM21 takes a more flexible approach to the suite of land uses which are considered acceptable in district and local centres in Norwich. We consider that this approach should remain (including the four assessment criteria in the first part of the policy). However, in line with the comments above in relation to DM20, we would recommend that the quantitative thresholds in the second part of DM21 and are replaced with qualitative assessment criteria.

- <u>South Norfolk development management policies plan</u>. Within this development management policies document, there are two main policies which deal with retail and town centre proposals: DM2.4 and DM2.5:

  - DM2.4. This policy outlines the hierarchy of centres in South Norfolk and goes on to explain the preferred locations for main town centre uses and the circumstances when sequential and impact assessments will be required. We consider that DM2.4 remains broadly in line with current national policy in relation to the issues covered part (3) of the policy needs refinement in order to state that sequential site assessments are required for main town centre uses and impact assessments are required for retail and leisure uses only.

- DM2.5. In line with the comments made above, we consider that Policy DM2.5 requires refinement in relation to the following areas:
  - whilst part (1) of DM2.5 offers a flexible approach to a range of main town centre uses, the quantitative approach to proposals in primary shopping areas and the town centre areas of Diss and Harleston should be amended to become more qualitative in nature.
  - In addition, changes to the use classes order mean that the general approach to parts (2), (3), (4) and (5) will need to be re-visited as changes from the former Class A1 use to certain other main town centres no longer require planning permission.
- DM2.6. This policy deals with food and beverage uses, including take-aways. We do not consider that the general criteria-based approach to managing these types of use is in need of amendment, although the changes in the use classes order prompt a revision to the first paragraph of the policy[8].

- Broadland development management policies plan. The main policy in this plan dealing with town centre policies is Policy R1. There are two parts to the policy, the first providing a positive and flexible approach to town centre type uses will increase the attractiveness and vitality of a particular centre, and the second which provides a quantitative control over the proportion of former Class A1 uses in the defined district and commercial centres. in line with comments made above, we consider that the second part of Policy R1 should be revised with qualitative factors replacing quantitative factors.

5.6 In light of the above, we consider that development management policies for retail and town centres could be reviewed or the new Greater Norwich Local Plan could update certain development policies, including:

- providing a strategic policy which explains the 'town centre' hierarchy across the Greater Norwich area;
- updating development management policies to explain which main town centre land use proposals should be subject to the sequential test;
- updating development management policies to explain which retail and leisure land use proposals should be subject to an impact assessment;
- updating development management policies in relation to 'town centres' in order to reflect (A) the on-going changes regarding the retail sector and the wider suite of land uses now required to

[8] former Class A3 now falling into Class E and former Classes A4 and A5 now becoming sui generis

support town centre health; (B) changes in national planning policy; and (C) the recent changes in the use classes order.

Use Class E

5.7 As outlined in Section 2 of this document, the recent changes to the use classes order have significant implications for the classification of certain main town centre uses. In turn, this will affect the content of existing development management policies associated with town centres and also policies for certain edge/out of centre proposals. The analysis above has highlighted the implications of the new Use Class E on existing planning policies and how they will need to change and the wider implications of the new use class can be summarised as follows:

- in the short term, the three local planning authorities in the Greater Norwich area will need to apply existing development plan policies in the context of development proposals which involve the new Use Class E. The consideration of certain policies will now simply not be required, given the changes in the use classes order, whilst proposals for certain main town centre uses falling outside of Class E will need to be assessed in the context of this new environment. References to the former Class A uses may become problematic, particularly now in light of the lack of control over former Class A1 uses.
- as noted above, the changes in the use classes order prompt a need to re-draft some existing town centre development management policies. It would appear sensible that whilst the existing development management documents are retained, certain policies are superseded.
- finally, proposals for uses within the new Class E in edge/out of centre locations will require careful consideration. The system is likely to require time to 'bed in' (and may also raise some legal challenges) but it seems likely that simply applying for floorspace within Class E is not a realistic option is certain circumstances as assessments submitted in support of planning applications will need to drill down and consider the sub-categories in Class E, thus prompting restrictive conditions on planning permissions.

5.8 Therefore, whilst it is the intention of the Client to retain the three existing development management policies plans in Norwich, Broadland and South Norfolk, there is a case for updating a number of the town centre and retail/leisure-related policies in those documents.

5.9 As outlined earlier in this document, in addition to the changes to the use classes order introduced in September 2020, the government has recently published a consultation on further changes which would allow Class E land uses to convert to residential use. At the present time this is only a draft proposal although, should it be implemented, it is likely to change the landscape in town centres and potentially impact upon the contribution of commercial floorspace. The level of change will clearly be dependant on the suitability of individual properties for conversion, which may reduce the impact on core shopping areas, although it will nevertheless, if implemented, be a significant change for the future of town centres. It will also have an impact upon how the Councils draft their development management policies and approach development management decisions[9].

Identification of New Local Centres

5.10 It is a well-established part of good planning practice, when planning for new and expanded communities to consider whether provision for retail, service and other main town centre uses should be made. It is important to ensure that local communities have easy and convenient access to day to day retail and service provision, in order to reduce/minimise trip lengths and provide a good spatial distribution of facilities.

5.11 As a consequence, the Client has asked that the Update Study provides advice on the framework for identifying new local centres, in order to meet the above objectives. For the avoidance of doubt, this advice relates to new local centres to be provided within new residential (or residential-led mixed use) communities and does not seek to examine whether existing clusters of shops and services (which are current designated as out of centre locations) should be re-designated as defined 'centres' in the formal hierarchy.

5.12 At the present time, the Regulation 18 consultation version of proposes a four-tier hierarchy of centres. A large majority of these are existing centres, although in tier 3, it is noted that new district centres will be established in accordance with the Growth Triangle Area Action Plan, whilst tier 4 allows for new and enhanced local centres serving major growth locations. The Growth Triangle AAP identifies new local centres at Brook Farm, on land south of Salhouse Road, North Sprowston & Old Catton[10] and North Rackheath.

5.13 With regards to the provision of new local centres, whether they be centres already identified in an existing development plan document, or additional centres via the new Local Plan, we consider that two factors are important. First, existing development plan allocations for new local centres do not always the expected scale, role and function of the centre. We have experience of similar situations across the country where the lack of clarity over the above issues has led to large developments being promoted which has wider catchments and beyond what could be reasonably termed a local day to

[9] including potential restrictions on permitted development rights
[10] which has an extant planning permission, included in our updated quantitative assessment

day shopping centre. Therefore, we would recommend that further guidance and direction is offered by the new Local Plan in order to ensure that there is certainty over local centres promoted within the existing development plan documents. Second, a similar approach should apply to additional local centres being considered for new allocations in the Greater Norwich Local Plan. Where it is considered approach to plan for a new local centre (see below) individual development plan policies should be clear over the scale, content and function of each centre.

5.14 In our view, appropriately sized new centres are important for the overall provision of retail and service uses as they will provide easily accessible facilities for new and expanded communities although they need to be controlled in order that they serve local needs and not affect the health and attractiveness of higher order centres. They must also be placed in an appropriate location to serve these new communities and not be attractive to a wider catchment.

5.15 We set out below (not in any order of importance or preference) a basket of factors which we feel may be appropriate for the Client to take into account when considering the amount and location of expanded retail and service provision to serve new residential neighbourhoods (whether it clarification over the role and content of new centres already in the development plan or new planned centres):

- From the outset, the role and function of the local centre should be defined. Centres within this tier of the hierarchy should be designed to serve a local catchment, focusing on the development in which they are located. Whilst there is no current definition of a 'local centre' in either the NPPF or the NPPG there is no reason why the Client cannot include one in the glossary to the new Local Plan. The
- The size of the new community which the new local/neighbourhood centre should serve. The number of new homes/residents within a new community will provide an important guide as to the scale and function of any new centre, which can be calculated the level of expenditure capacity arising from the size of the new community. Whilst it has been superseded by the NPPF we consider that the definition of local centres in Planning Policy Statement 4 remains a useful and common-sense approach to the role and function of such centres: *"Local centres include a range of small shops of a local nature, serving a small catchment. Typically, local centres might include, amongst other shops, a small supermarket, a newsagent, a sub-post office and a pharmacy. Other facilities could include a hot-food takeaway and launderette".*
- When considering whether to plan for new additional centres, we consider that the following factors should be taken into account:
    - o Geographic distribution of retail floorspace and main town centre uses. The size of a new local or neighbourhood centre in a new community will also be influenced by the proximity to

existing retail provision. For example, if an existing town, local or district centre lies nearby then there may not be a need to plan for a further new centre. Therefore, a detailed survey should be undertaken of the scale and type existing provision in the surrounding area, examine the retail/service offer.

- Walk-in catchments and public transport accessibility. It will be important when planning for the provision of new centres that they are easily accessible by public accessible and on foot. Therefore, not only will 'walking' issues dictate the location of a new local centre in a new community, but walking/public transport will help to understand whether there are any gaps in provision.
- Accessibility by private car. Whilst it will be very important for new communities to promote a walking led environment, it is inescapable that the private car will continue to provide an important mode of transport, particularly for food shopping. Therefore, it would be appropriate to undertake a drive-time analysis in order to understand journey lengths to the nearest existing shopping facilities.
- Retail expenditure. Finally, as noted above, the need for a new local centre in a particular location can be guided by the amount of available retail expenditure. The potential spending power of a particular location can help to understand whether it is likely to be able to support new provision.

6. Summary and Conclusions

6.1 This Greater Norwich Town Centres & Retail Study Update report has been prepared by Avison Young for Norfolk County Council, Norwich City Council, Broadland District Council and South Norfolk Council (also known as the Greater Norwich Development Partnership). In 2017, Avison Young (formerly GVA) completed the Greater Norwich Town Centres & Retail Study which was part of the wider Employment, Retail and Town Centre Study and provided evidence base information and analysis for the Client for the new Greater Norwich Local Plan in relation to town centre health and retail floorspace need issues.

6.2 In July 2020, GNDP identified the need to update the evidence base on economic, employment land supply and retail issues to reflect the passage of time since the existing evidence was produced and most particularly to take account of the impact of both the UK's exit from the European Union and the COVID-19 pandemic. As a consequence, Avison Young have produced two separate reports: this Update Study and also an Employment Land Assessment Addendum.

6.3 This report concentrates upon the following issues:

- A review of current / recent trends in the retail sector, including changes in economic forecasts since the completion of the 2017 Study.
- An updated assessment of quantitative retail expenditure capacity for convenience and comparison goods across the main settlements in the Greater Norwich development plan area.
- Advice in relation to the planning policy approach for retail land use issues in the Greater Norwich area.

6.4 From the outset, it should be noted that this Update Study has been prepared during the on-going effects of COVID-19 pandemic, which has had a severe impact upon the UK economy in 2020. The content of this Study includes evidence base data which was collected in association with the 2017 Study (including shopping and leisure patterns) and also the latest economic data from Experian published in October 2020 (which incorporate the latest forecasts in relation to the potential impact of the COVID-19 pandemic). As a consequence, the factual content of this Study should be read and understood in this context. Moreover, as will be discussed further later in this report, the impact of the COVID-19 pandemic is, based upon current predictions, likely to have long-lasting effects on the UK economy and how people interact with retail, leisure and wider town centre uses. Therefore, the content of this Study should be seen as a baseline for the evidence base library for the Local Plan and there will be a need for the Client to consider updates to the health checks, economic forecasts and shopping patterns in due course, as the preparation of the Local Plan progresses.

6.5 This Update Study records the latest trends in the retail sector and records the changes in retail expenditure forecasts since the completion of the 2017 Study. The key messages to take away from our review are that:

- The pressures facing certain parts of the retail sector, particular high street comparison goods retailers, have continued with a number of business failures and other retailers seeking to down-size their store portfolios and concentrate on larger centres. These trends have been intensified throughout 2020 due to the severe impacts of the COVID-19 pandemic, as businesses were forced to shut and also attracted fewer customer visits into stores.
- In relation to the changes in per capita retail expenditure forecasts since the completion of the 2017 Study, a comparison between the latest data published by Experian and the 2017 work reveals no substantial change in convenience goods spending up to 2035. However, there is a significant downgrading of future growth in comparison goods in the period up to 2035 (+58% in the 2017 Study and +36% in the latest assessment).
- A key influencing factor for this change is spending via the internet. Spending via the internet, particularly in relation to comparison goods has been a growing trend for many years although the impact of the COVID-19 pandemic has led to a significant increase in the market share of this channel in 2020 (23.4% in 2019 and 30.6% in 2020). Whilst there is predicted to be a small 'bounce back' in 2021, it is unlikely that the share of spending via the internet will return to levels seen pre-2020.

6.6 Our updated assessment of quantitative expenditure/floorspace capacity has incorporated the latest economic forecasts and taken into account recent retail store openings and retail floorspace commitments. The updated assessment has found that:

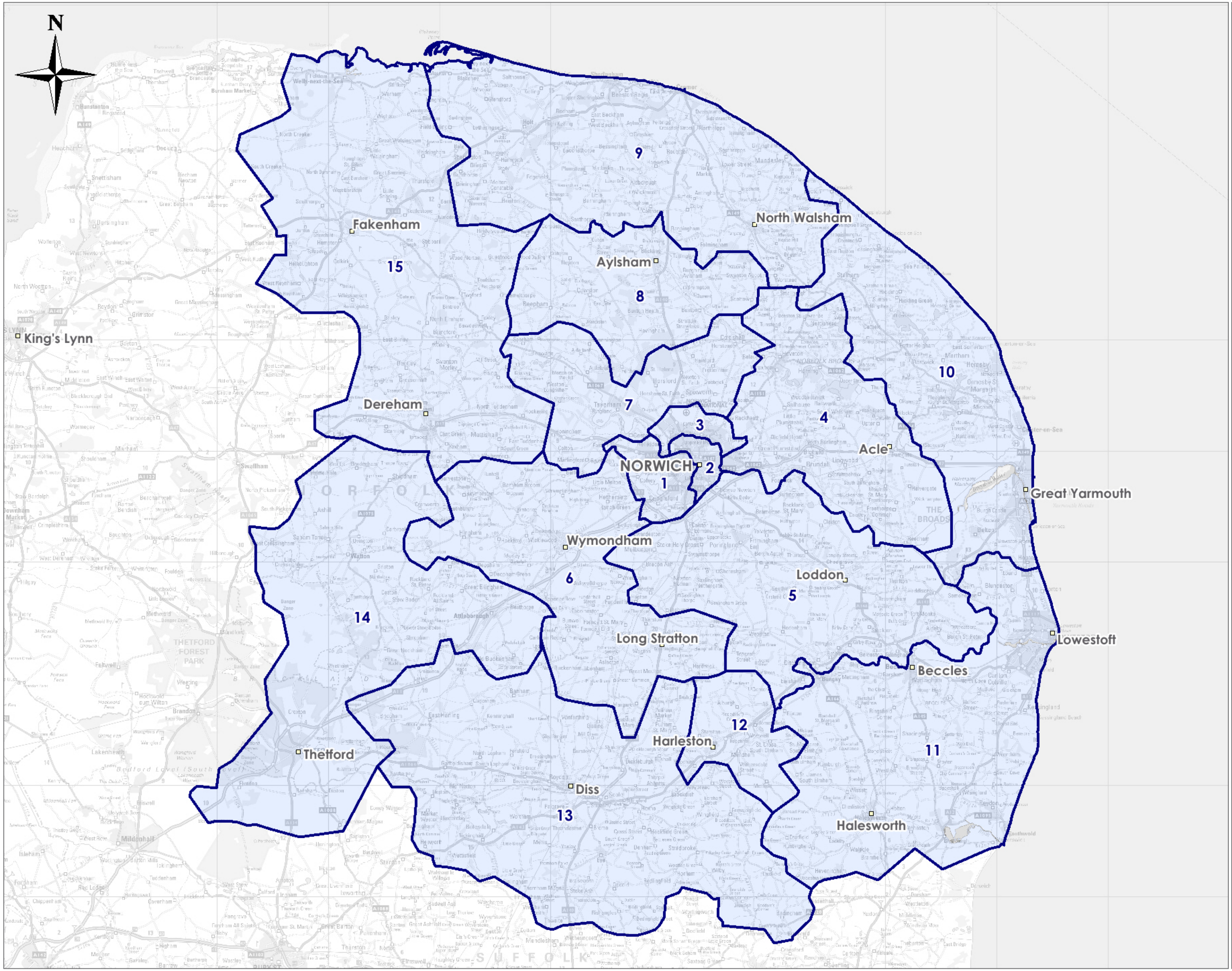
- There has not been a significant change in the convenience goods floorspace forecasts across each of the three main geographic areas. It remains the case that there is no quantitative requirement to plan for net additional convenience goods floorspace, although, as outlined below, there may be very good qualitative reasons why a modest amount of convenience goods floorspace should be placed in new local centres to support the day to day needs of new communities.
- For the reasons outlined above, there has been a material change in the level of retail expenditure available to support 'bricks and mortar' comparison goods floorspace across the Greater Norwich area. The changes has, unsurprisingly, been focused upon the Norwich urban area. Our updated assessment takes into account the fall in available expenditure since 2017 and shows a small over-supply in comparison goods floorspace across the two rural areas, whilst the over-supply in the

Norwich urban area is circa -20,000sq m net. These levels of 'negative capacity' confirm the current draft strategy for retailing in the new Local Plan which is not to allocate sites/locations for net additional comparison goods floorspace. Instead, the forecast over-supply would reinforce an approach which seeks to concentrate upon existing provision in terms of redevelopment, refurbishment/remodelling, and, in some instances, down-sizing and repurposing to other land uses appropriate to town centre environments.

6.7 Finally, in relation to retail and town centre planning policy in the new Local Plan, we have reviewed existing policies in the current JCS and development management documents and have made a series of recommendations for refinements / updates to policy, including:

- Application of the sequential and impact tests for different types of main town centre land uses.
- Revisions to town centre development management policies to take into account the recent changes to the use classes order (particularly the introduction of Use Class E, which replaces certain Class A, B and D land uses)
- In line with changes in national planning policy, revisions to policy to move away from rigid quantitative retail unit thresholds and, instead, encourage a wider range of land uses in town centres.
- Advice on how to approach the assessment of proposals for land uses in Class E in locations outside of defined town centres.

Appendix I
Study Area



Study area & household telephone survey zones

Key

Study Area

Survey Zone

Zone	Postal Sectors
1	NR2 1/2/3/4, NR4 6/7, NR5 0/8/9
2	NR1 1/2/3/4, NR3 1/2/3/4
3	NR6 5/6/7, NR7 8/9
4	NR7 0, NR12 8, NR13 3/4/5/6
5	NR14 6/7/8, NR15 1, NR34 0, NR35 2
6	NR9 3/4, NR15 2, NR16 1, NR18 0/9
7	NR8 5/6, NR9 5, NR10 3, NR12 7
8	NR10 4/5, NR11 6
9	NR11 7/8, NR24 2, NR25 6/7/8 NR27 0/9, NR28 0/9
10	NR12 0/9, NR29 3/4/5 NR30 1/2/3/4/5, NR31 0/6/7/8/9
11	IP18 6, IP19 0/8/9, NR32 1/2/3/4/5, NR33 0/7/8/9, NR34 7/8/9, NR35 1
12	IP20 0/9
13	IP13 8, IP21 4/5, IP22 1/2/4/5 IP23 7/8, NR16 2
14	IP24 1/2/3, IP25 6/7, NR17 1/2
15	NR19 1/2, NR20 3/4/5, NR21 0/7/8/9 NR22 6, NR23 1

Greater Norwich Town Centre and Retail Study

Appendix II

Updated Convenience Goods Quantitative Expenditure Capacity Assessment

Greater Norwich Town Centres & Retail Study Update 2020

Convenience Need Assessment

	Greater Norwich zones

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Total
2020	85,033	62,074	44,420	50,075	41,666	49,377	42,653	21,315	63,055	116,946	122,384	8,695	53,095	67,186	63,736	**891,710**
2025	88,177	63,671	45,503	51,599	43,670	52,048	44,388	21,969	64,759	120,166	124,467	9,150	55,038	69,698	65,986	**920,289**
2030	91,268	65,425	46,509	52,955	45,187	54,316	46,123	22,498	66,422	123,192	126,455	9,439	56,762	71,991	67,934	**946,476**
2035	94,386	67,101	47,554	54,395	46,948	56,786	47,858	23,090	68,106	126,315	128,491	9,811	58,596	74,394	70,033	**973,859**
2038	95,493	68,049	47,993	54,816	47,205	57,352	48,450	23,175	68,799	127,577	129,542	9,818	58,815	75,367	70,513	**982,964**
Change 2020-2038	**10,460**	**5,975**	**3,573**	**4,741**	**5,539**	**7,975**	**5,797**	**1,860**	**5,744**	**10,631**	**7,158**	**1,123**	**5,720**	**8,181**	**6,777**	***91,254***

Source: Experian (October 2020)

Greater Norwich Town Centres & Retail Study Update 2020
Convenience Need Assessment

	Greater Norwich zones

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2014 prices) - Convenience Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15
2020	2,098	2,210	2,321	2,404	2,403	2,316	2,256	2,307	2,412	2,220	2,304	2,415	2,398	2,138	2,337
2020 W SFT	**1,966**	**2,071**	**2,175**	**2,252**	**2,252**	**2,170**	**2,114**	**2,162**	**2,260**	**2,080**	**2,159**	**2,263**	**2,247**	**2,003**	**2,190**
2025	1,979	2,085	2,189	2,267	2,266	2,184	2,128	2,176	2,275	2,094	2,173	2,278	2,262	2,017	2,204
2025 W SFT	**1,856**	**1,955**	**2,053**	**2,127**	**2,126**	**2,049**	**1,996**	**2,041**	**2,134**	**1,964**	**2,038**	**2,137**	**2,122**	**1,892**	**2,068**
2030	1,963	2,068	2,172	2,249	2,248	2,167	2,111	2,159	2,257	2,077	2,156	2,260	2,244	2,001	2,187
2030 W SFT	**1,830**	**1,927**	**2,024**	**2,096**	**2,096**	**2,020**	**1,967**	**2,012**	**2,103**	**1,936**	**2,009**	**2,106**	**2,091**	**1,865**	**2,038**
2035	1,963	2,068	2,172	2,249	2,248	2,167	2,111	2,159	2,257	2,077	2,156	2,260	2,244	2,001	2,187
2035 W SFT	**1,824**	**1,921**	**2,018**	**2,090**	**2,089**	**2,013**	**1,961**	**2,005**	**2,097**	**1,930**	**2,003**	**2,099**	**2,084**	**1,859**	**2,031**
2038	1,965	2,070	2,174	2,252	2,251	2,169	2,113	2,161	2,259	2,079	2,158	2,262	2,246	2,003	2,189
2038 W SFT	**1,822**	**1,919**	**2,015**	**2,087**	**2,086**	**2,011**	**1,959**	**2,003**	**2,094**	**1,928**	**2,000**	**2,097**	**2,082**	**1,856**	**2,029**

Source: Experian Micromarketer, October 2020. Growth rates and allowance for SFT are dervied from
Experian Retail Planner 18 (October 2020)

Table 3

Survey Area Retail Expenditure Forecasts (2014 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)
2020	167.2	128.5	96.6	112.8	93.8	107.2	90.2	46.1	142.5	243.3	264.2	19.7	119.3	134.6	139.6	**1,905.4**
2025	163.7	124.5	93.4	109.7	92.8	106.6	88.6	44.8	138.2	236.0	253.7	19.5	116.8	131.8	136.4	**1,856.8**
2030	167.0	126.1	94.1	111.0	94.7	109.7	90.7	45.3	139.7	238.5	254.1	19.9	118.7	134.2	138.4	**1,882.2**
2035	172.1	128.9	95.9	113.7	98.1	114.3	93.9	46.3	142.8	243.8	257.3	20.6	122.1	138.3	142.3	**1,930.3**
2038	174.0	130.6	96.7	114.4	98.5	115.3	94.9	46.4	144.1	245.9	259.1	20.6	122.5	139.9	143.1	**1,946.0**
Change 2020-38	***6.8***	***2.0***	***0.1***	***1.6***	***4.7***	***8.2***	***4.7***	***0.3***	***1.6***	***2.6***	***-5.1***	***0.9***	***3.2***	***5.3***	***3.5***	***40.5***

Source: Tables 1 & 2

Greater Norwich zones

Table 4
Convenience Goods Allocation - % Market Share

Zone Centre/Store	Policy Allocation	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)	Zone 13 (%)	Zone 14 (%)	Zone 15 (%)
Norwich City Council area stores																
Norwich city centre stores																
Other stores, Norwich City Centre	City Centre	4.4%	4.2%	1.8%	1.0%	0.4%	0.2%	0.3%	0.3%	2.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%
District/Local centes																
Morrisons, Riverside	District Centre	2.0%	14.3%	10.8%	3.4%	7.3%	0.7%	3.5%	1.2%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Eaton Centre	District Centre	17.2%	1.3%	0.0%	1.4%	2.9%	0.0%	0.6%	0.5%	0.0%	0.0%	0.0%	0.6%	0.0%	0.0%	0.0%
Asda, Hall Road	District Centre	6.3%	3.8%	1.1%	3.1%	3.0%	5.4%	2.4%	7.2%	0.9%	0.0%	0.0%	1.9%	0.3%	0.8%	0.0%
Aldi, Larkman Lane	District Centre	6.7%	0.0%	0.0%	0.2%	0.7%	1.3%	1.9%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.0%
Aldi, Sprowston Road	District Centre	2.7%	8.7%	11.4%	0.6%	0.7%	0.0%	2.8%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Aldi, Plumstead Road	District Centre	0.0%	6.9%	1.3%	4.1%	0.2%	0.4%	0.8%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Drayton Road	District Centre	0.6%	2.9%	0.4%	0.0%	0.5%	0.4%	2.0%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Iceland, Anglia Square	District Centre	0.4%	3.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	4.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.2%	2.9%	1.1%	0.0%	0.0%	0.0%	0.3%	3.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Other stores																
Sainsbury's, Brazen Gate	Edge of Centre	5.8%	13.2%	0.9%	0.0%	2.4%	1.2%	0.0%	0.5%	0.0%	0.0%	0.4%	0.0%	0.0%	0.0%	0.0%
Asda, Drayton High Road, Hellesdon	Out of Centre	3.3%	6.6%	13.4%	0.0%	0.0%	0.2%	13.1%	1.3%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Norwich City Council area		**53.8%**	**68.4%**	**42.2%**	**13.8%**	**18.1%**	**9.8%**	**27.9%**	**17.6%**	**4.3%**	**0.2%**	**0.4%**	**2.5%**	**0.3%**	**0.8%**	**1.3%**
South Norfolk area stores																
Norwich urban area stores																
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	7.3%	1.3%	0.0%	0.9%	14.7%	9.9%	0.8%	0.0%	0.0%	0.0%	0.0%	1.8%	0.0%	1.1%	0.0%
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	14.7%	0.0%	3.7%	1.9%	0.7%	5.8%	11.1%	3.5%	0.0%	0.0%	0.0%	1.0%	0.0%	0.0%	2.1%
Sub-total, South Norfolk - Norwich urban area		**22.0%**	**1.3%**	**3.7%**	**2.8%**	**15.3%**	**15.7%**	**11.9%**	**3.5%**	**0.0%**	**0.0%**	**0.0%**	**2.8%**	**0.0%**	**1.1%**	**2.1%**
Diss stores																
Aldi, Mere Street, Diss	Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	1.6%	0.0%	0.0%	0.0%	0.0%	0.0%	8.4%	18.2%	0.0%	0.0%
Morrisons, Victoria Road, Diss	Edge of Centre	0.0%	0.0%	0.0%	0.0%	1.0%	1.8%	0.0%	0.0%	0.0%	0.0%	0.2%	19.6%	33.4%	0.2%	0.0%
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	0.0%	0.0%	0.0%	0.0%	0.0%	9.0%	19.8%	0.0%	0.0%
Sub-total, Diss stores		**0.4%**	**0.0%**	**0.0%**	**0.0%**	**1.0%**	**4.8%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.2%**	**37.0%**	**71.4%**	**0.2%**	**0.0%**
Harleston stores																
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	28.4%	0.7%	0.0%	0.0%
Co-Op, Market Place, Harleston	Edge of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	4.3%	0.0%	0.0%	0.0%
Co-Op, London, Road, Harleston	Edge of Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	7.3%	0.0%	0.0%	0.0%
Sub-total. Harleston stores		**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**	**40.0%**	**0.7%**	**0.0%**	**0.0%**
Wymondham stores																
Co-Op, Market Place, Wymondham	Town Centre	0.0%	0.8%	0.0%	0.0%	0.0%	3.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0%	0.0%	0.0%	0.0%	0.5%	11.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.6%	0.3%
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0%	0.0%	0.0%	0.0%	1.1%	27.1%	0.0%	0.2%	0.6%	0.0%	0.0%	0.0%	0.0%	3.0%	0.0%
Sub-total, Wymodham stores		**0.0%**	**0.8%**	**0.0%**	**0.0%**	**1.6%**	**42.1%**	**0.0%**	**0.2%**	**0.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**6.6%**	**0.3%**
Other stores																
Co-Op, Church Plain, Loddon	Town Centre	0.0%	0.0%	0.0%	0.0%	8.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, The Street, Long Stratton	Town Centre	0.0%	0.0%	0.0%	0.0%	1.4%	9.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0%	0.0%	0.0%	0.0%	6.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, other stores		**0.0%**	**0.0%**	**0.0%**	**0.0%**	**16.4%**	**9.6%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**
Sub-total, South Norfolk area		**22.3%**	**2.2%**	**3.7%**	**2.8%**	**34.4%**	**72.5%**	**11.9%**	**3.7%**	**0.6%**	**0.0%**	**0.5%**	**79.8%**	**72.1%**	**7.8%**	**2.4%**
Broadland area stores																
Norwich urban area stores																
Sainsbury's, Pound Lane, Norwich	District Centre	0.6%	2.6%	5.0%	17.2%	1.0%	0.2%	0.7%	0.3%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.4%
Morrisons, The Paddocks, Spixworth	District Centre	0.0%	0.2%	8.9%	1.1%	0.0%	0.5%	4.8%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0%	8.4%	24.3%	11.8%	0.6%	0.7%	6.8%	1.2%	1.4%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Drayton	Out of centre	0.0%	0.0%	0.8%	0.0%	0.0%	0.0%	18.5%	0.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Broadland - Norwich urban area		**0.6%**	**11.2%**	**39.0%**	**30.1%**	**1.6%**	**1.4%**	**30.7%**	**2.5%**	**1.4%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.4%**
Rural Broadland																
Co-Op, Acle	In-centre	0.0%	0.0%	0.0%	6.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Budgens, Acle	Out of centre	0.0%	0.0%	0.0%	5.9%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Budgens, Norwich Road, Aylsham	In-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	6.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Co-Op, Market Place, Aylsham	In-centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	3.4%	0.4%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Tesco, Aylesham	Out of centre	0.0%	0.5%	2.2%	0.0%	0.0%	0.0%	0.7%	35.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%
Co-Op, Horsford	Out of centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.8%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Rural Broadland		**0.0%**	**0.5%**	**2.2%**	**12.8%**	**0.0%**	**0.0%**	**6.5%**	**44.8%**	**1.4%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.3%**
Sub-total, Broadland area		**0.6%**	**11.7%**	**41.2%**	**42.9%**	**1.6%**	**1.4%**	**37.3%**	**47.4%**	**2.8%**	**0.9%**	**0.0%**	**0.0%**	**0.0%**	**0.0%**	**0.6%**
(Total for Norwich urban area main stores)		***76.3%***	***80.9%***	***84.9%***	***46.7%***	***35.0%***	***26.9%***	***70.6%***	***23.7%***	***5.7%***	***1.1%***	***0.4%***	***5.2%***	***0.3%***	***1.8%***	***3.7%***
TOTAL GREATER NORWICH MAIN STORES		**76.7%**	**82.2%**	**87.2%**	**59.5%**	**54.1%**	**83.6%**	**77.1%**	**68.7%**	**7.8%**	**1.1%**	**0.9%**	**82.3%**	**72.4%**	**8.6%**	**4.3%**
North Walsham foodstores		0.0%	0.0%	1.2%	0.7%	0.0%	0.0%	0.2%	11.8%	41.9%	4.2%	0.0%	0.0%	0.0%	0.0%	0.0%
Cromer/Sheringham foodstores		0.0%	0.0%	0.5%	0.0%	0.0%	0.0%	0.2%	0.8%	21.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Great Yarmouth/Caistor-on-Sea foodstores		0.0%	0.3%	0.0%	23.4%	0.2%	0.0%	0.3%	0.2%	0.9%	64.3%	2.2%	0.0%	0.0%	0.0%	0.0%
Lowestoft foodstores		0.2%	0.0%	0.0%	0.0%	3.8%	0.0%	0.0%	0.0%	0.0%	5.1%	51.9%	0.0%	0.0%	0.0%	0.0%
Beccles foodstores		0.0%	0.0%	0.0%	0.0%	22.6%	0.7%	0.0%	0.0%	0.0%	0.6%	23.8%	3.8%	1.2%	0.0%	0.0%
Thetford foodstores		0.0%	0.0%	0.0%	0.0%	0.5%	0.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.4%	46.4%	0.0%
Dereham foodstores		0.6%	0.0%	0.0%	0.0%	0.0%	0.5%	3.2%	3.1%	0.2%	0.0%	0.0%	0.0%	0.0%	12.3%	49.4%
Fakenham foodstores		0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.9%	1.3%	8.2%	0.0%	0.0%	2.9%	0.4%	0.0%	32.4%
Other/local shops in survey area		20.9%	15.7%	10.0%	16.4%	18.8%	9.6%	18.1%	13.6%	19.7%	24.2%	18.0%	11.0%	13.1%	17.2%	8.5%
Other/local shops outside survey area		1.6%	1.8%	1.2%	0.0%	0.0%	4.9%	0.0%	0.5%	0.3%	0.6%	3.2%	0.0%	7.5%	15.5%	5.3%
OVERALL TOTAL		**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**	**100.0%**

Greater Norwich zones

Table 5a
Convenience Goods Allocation 2020 - Spend (£) 2014 Prices

Zone Centre/Store	Policy Allocation	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2020		**167.2**	**128.5**	**96.6**	**112.8**	**93.8**	**107.2**	**90.2**	**46.1**	**142.5**	**243.3**	**264.2**	**19.7**	**119.3**	**134.6**	**139.6**	**1,905.4**	***100.0***
Norwich City Council area stores																		
Norwich city centre stores																		
Other stores, Norwich City Centre	City Centre	7.4	5.4	1.7	1.1	0.3	0.2	0.3	0.2	3.2	0.0	0.0	0.0	0.0	0.0	0.5	**20.3**	***1.1***
District/Local centes																		
Morrisons, Riverside	District Centre	3.4	18.4	10.4	3.8	6.9	0.7	3.1	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**47.7**	***2.5***
Waitrose, Eaton Centre	District Centre	28.7	1.7	0.0	1.6	2.7	0.0	0.5	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**35.5**	***1.9***
Asda, Hall Road	District Centre	10.6	4.8	1.0	3.5	2.8	5.7	2.2	3.3	1.3	0.0	0.0	0.4	0.4	1.1	0.0	**37.1**	***1.9***
Aldi, Larkman Lane	District Centre	11.2	0.0	0.0	0.2	0.7	1.3	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.3	**16.6**	***0.9***
Aldi, Sprowston Road	District Centre	4.6	11.1	11.0	0.7	0.7	0.0	2.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.3**	***1.6***
Aldi, Plumstead Road	District Centre	0.0	8.8	1.2	4.6	0.2	0.5	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**16.3**	***0.9***
Lidl, Drayton Road	District Centre	1.1	3.7	0.4	0.0	0.5	0.5	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.2**	***0.4***
Iceland, Anglia Square	District Centre	0.7	4.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	***0.3***
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	6.9	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.2**	***0.4***
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.3	3.8	1.1	0.0	0.0	0.0	0.3	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.1**	***0.4***
Other stores																		
Sainsbury's, Brazen Gate	Edge of Centre	9.7	16.9	0.9	0.0	2.3	1.3	0.0	0.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	**32.5**	***1.7***
Asda, Drayton High Road, Hellesdon	Out of Centre	5.5	8.5	13.0	0.0	0.0	0.2	11.8	0.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0	**41.2**	***2.2***
Sub-total, Norwich City Council area		**89.9**	**87.9**	**40.8**	**15.6**	**17.0**	**10.4**	**25.2**	**8.1**	**6.2**	**0.5**	**1.1**	**0.5**	**0.4**	**1.1**	**1.8**	**306.4**	***16.1***
South Norfolk area stores																		
Norwich urban area stores																		
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	12.1	1.7	0.0	1.1	13.8	10.6	0.8	0.0	0.0	0.0	0.0	0.3	0.0	1.4	0.0	**41.8**	***2.2***
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	24.6	0.0	3.6	2.1	0.6	6.2	10.0	1.6	0.0	0.0	0.0	0.2	0.0	0.0	2.9	**51.8**	***2.7***
Sub-total, South Norfolk - Norwich urban area		**36.7**	**1.7**	**3.6**	**3.1**	**14.4**	**16.8**	**10.7**	**1.6**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**1.4**	**2.9**	**93.6**	***4.9***
Diss stores																		
Aldi, Mere Street, Diss	Town Centre	0.6	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	1.7	21.7	0.0	0.0	**25.7**	***1.3***
Morrisons, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.9	1.9	0.0	0.0	0.0	0.0	0.5	3.9	39.9	0.2	0.0	**47.3**	***2.5***
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	1.8	23.6	0.0	0.0	**26.8**	***1.4***
Sub-total, Diss stores		**0.6**	**0.0**	**0.0**	**0.0**	**0.9**	**5.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**7.3**	**85.2**	**0.2**	**0.0**	**99.8**	***5.2***
Harleston stores																		
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	5.6	0.8	0.0	0.0	**6.7**	***0.4***
Co-Op, Market Place, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	**0.8**	***0.0***
Co-Op, London, Road, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.4	0.0	0.0	0.0	**2.2**	***0.1***
Sub-total, Harleston stores		**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**7.9**	**0.8**	**0.0**	**0.0**	**9.8**	***0.5***
Wymondham stores																		
Co-Op, Market Place, Wymondham	Town Centre	0.0	1.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.9**	***0.3***
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	0.5	12.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.4	**18.0**	***0.9***
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	1.1	29.0	0.0	0.1	0.9	0.0	0.0	0.0	0.0	4.1	0.0	**35.1**	***1.8***
Sub-total, Wymodham stores		**0.0**	**1.0**	**0.0**	**0.0**	**1.5**	**45.2**	**0.0**	**0.1**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**8.9**	**0.4**	**58.0**	***3.0***
Other stores																		
Co-Op, Church Plain, Loddon	Town Centre	0.0	0.0	0.0	0.0	8.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.3**	***0.4***
Co-Op, The Street, Long Stratton	Town Centre	0.0	0.0	0.0	0.0	1.3	10.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**11.6**	***0.6***
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	5.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	***0.3***
Sub-total, other stores		**0.0**	**0.0**	**0.0**	**0.0**	**15.4**	**10.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**25.7**	***1.3***
Sub-total, South Norfolk area		**37.3**	**2.8**	**3.6**	**3.1**	**32.2**	**77.7**	**10.7**	**1.7**	**0.9**	**0.0**	**1.3**	**15.7**	**86.0**	**10.5**	**3.3**	**286.9**	***15.1***
Broadland area stores																		
Norwich urban area stores																		
Sainsbury's, Pound Lane, Norwich	District Centre	1.0	3.4	4.9	19.4	0.9	0.2	0.6	0.2	0.0	0.4	0.0	0.0	0.0	0.0	0.5	**31.5**	**1.7**
Morrisons, The Paddocks, Spixworth	District Centre	0.0	0.2	8.6	1.2	0.0	0.5	4.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**15.0**	**0.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0	10.8	23.5	13.3	0.6	0.7	6.2	0.5	2.0	1.8	0.0	0.0	0.0	0.0	0.0	**59.4**	**3.1**
Tesco, Drayton	Out of centre	0.0	0.0	0.8	0.0	0.0	0.0	16.6	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**17.7**	**0.9**
Sub-total, Broadland - Norwich urban area		**1.0**	**14.4**	**37.7**	**34.0**	**1.5**	**1.5**	**27.7**	**1.2**	**2.0**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**123.6**	**6.5**
Rural Broadland																		
Co-Op, Acle	In-centre	0.0	0.0	0.0	7.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.8**	**0.4**
Budgens, Acle	Out of centre	0.0	0.0	0.0	6.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.6**	**0.3**
Budgens, Norwich Road, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.1**
Co-Op, Market Place, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	**2.2**	**0.1**
Tesco, Aylesham	Out of centre	0.0	0.7	2.2	0.0	0.0	0.0	0.6	16.1	1.4	0.0	0.0	0.0	0.0	0.0	0.4	**21.4**	**1.1**
Co-Op, Horsford	Out of centre	0.0	0.0	0.0	0.0	0.0	0.0	5.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.3**
Sub-total, Rural Broadland		**0.0**	**0.7**	**2.2**	**14.4**	**0.0**	**0.0**	**5.9**	**20.7**	**2.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**46.2**	**2.4**
Sub-total, Broadland area		**1.0**	**15.0**	**39.8**	**48.4**	**1.5**	**1.5**	**33.6**	**21.8**	**4.0**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**169.8**	**8.9**
(Total for Norwich urban area stores)		***127.6***	***104.0***	***82.1***	***52.7***	***32.9***	***28.8***	***63.6***	***10.9***	***8.2***	***2.7***	***1.1***	***1.0***	***0.4***	***2.5***	***5.2***	***523.6***	***27.5***
TOTAL GREATER NORWICH MAIN STORES		**128.2**	**105.7**	**84.2**	**67.2**	**50.7**	**89.6**	**69.5**	**31.7**	**11.1**	**2.7**	**2.4**	**16.2**	**86.3**	**11.6**	**6.1**	**763.1**	**40.0**
North Walsham foodstores		0.0	0.0	1.1	0.8	0.0	0.0	0.1	5.4	59.7	10.2	0.0	0.0	0.0	0.0	0.0	**77.3**	**4.1**
Cromer/Sheringham foodstores		0.0	0.0	0.5	0.0	0.0	0.0	0.2	0.4	30.1	0.0	0.0	0.0	0.0	0.0	0.0	**31.2**	**1.6**
Great Yarmouth/Caistor-on-Sea foodstores		0.0	0.4	0.0	26.4	0.2	0.0	0.3	0.1	1.3	156.3	5.9	0.0	0.0	0.0	0.0	**190.8**	**10.0**
Lowestoft foodstores		0.4	0.0	0.0	0.0	3.6	0.0	0.0	0.0	0.0	12.3	137.1	0.0	0.0	0.0	0.0	**153.4**	**8.0**
Beccles foodstores		0.0	0.0	0.0	0.0	21.2	0.8	0.0	0.0	0.0	1.5	62.8	0.8	1.4	0.0	0.0	**88.5**	**4.6**
Thetford foodstores		0.0	0.0	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	6.4	62.4	0.0	**69.9**	**3.7**
Dereham foodstores		0.9	0.0	0.0	0.0	0.0	0.5	2.9	1.4	0.2	0.0	0.0	0.0	0.0	16.5	69.0	**91.5**	**4.8**
Fakenham foodstores		0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.6	11.7	0.0	0.0	0.6	0.4	0.0	45.3	**59.4**	**3.1**
Other/local shops in survey area		34.9	20.2	9.6	18.5	17.7	10.3	16.3	6.3	28.0	58.8	47.4	2.2	15.7	23.2	11.9	**321.0**	**16.8**
Other/local shops outside survey area		2.7	2.3	1.2	0.0	0.0	5.2	0.0	0.2	0.4	1.4	8.6	0.0	9.0	20.9	7.3	**59.3**	**3.1**
OVERALL TOTAL		**167.2**	**128.5**	**96.6**	**112.8**	**93.8**	**107.2**	**90.2**	**46.1**	**142.5**	**243.3**	**264.2**	**19.7**	**119.3**	**134.6**	**139.6**	**1,905.4**	**100.0**

Source: Table 3, Table 4

Greater Norwich zones

Table 5b
Convenience Goods Allocation 2025 - Spend (£) 2014 Prices

Zone Centre/Store	Policy Allocation	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2025		**163.7**	**124.5**	**93.4**	**109.7**	**92.8**	**106.6**	**88.6**	**44.8**	**138.2**	**236.0**	**253.7**	**19.5**	**116.8**	**131.8**	**136.4**	**1,856.8**	***100.0***
Norwich City Council area stores																		
Norwich city centre stores																		
Other stores, Norwich City Centre	City Centre	7.2	5.3	1.7	1.1	0.3	0.2	0.3	0.1	3.1	0.0	0.0	0.0	0.0	0.0	0.5	**19.8**	***1.1***
District/Local centes																		
Morrisons, Riverside	District Centre	3.3	17.8	10.0	3.7	6.8	0.7	3.1	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**46.5**	***2.5***
Waitrose, Eaton Centre	District Centre	28.1	1.6	0.0	1.5	2.7	0.0	0.5	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**34.8**	***1.9***
Asda, Hall Road	District Centre	10.4	4.7	1.0	3.4	2.8	5.7	2.2	3.2	1.2	0.0	0.0	0.4	0.4	1.0	0.0	**36.3**	***2.0***
Aldi, Larkman Lane	District Centre	11.0	0.0	0.0	0.2	0.7	1.3	1.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.3	**16.3**	***0.9***
Aldi, Sprowston Road	District Centre	4.5	10.8	10.7	0.7	0.7	0.0	2.4	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.4**	***1.6***
Aldi, Plumstead Road	District Centre	0.0	8.5	1.2	4.5	0.2	0.5	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**15.8**	***0.9***
Lidl, Drayton Road	District Centre	1.0	3.6	0.4	0.0	0.5	0.5	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.0**	***0.4***
Iceland, Anglia Square	District Centre	0.6	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	***0.3***
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	6.7	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.0**	***0.4***
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.3	3.7	1.0	0.0	0.0	0.0	0.3	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.9**	***0.4***
Other stores																		
Sainsbury's, Brazen Gate	Edge of Centre	9.5	16.4	0.9	0.0	2.2	1.3	0.0	0.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	**31.6**	***1.7***
Asda, Drayton High Road, Hellesdon	Out of Centre	5.4	8.2	12.6	0.0	0.0	0.2	11.6	0.6	1.6	0.0	0.0	0.0	0.0	0.0	0.0	**40.2**	***2.2***
Sub-total, Norwich City Council area		**88.0**	**85.1**	**39.5**	**15.2**	**16.8**	**10.4**	**24.7**	**7.9**	**6.0**	**0.5**	**1.1**	**0.5**	**0.4**	**1.0**	**1.8**	**298.8**	***16.1***
South Norfolk area stores																		
Norwich urban area stores																		
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	11.9	1.7	0.0	1.0	13.6	10.6	0.7	0.0	0.0	0.0	0.0	0.3	0.0	1.4	0.0	**41.2**	***2.2***
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	24.1	0.0	3.5	2.0	0.6	6.2	9.8	1.6	0.0	0.0	0.0	0.2	0.0	0.0	2.8	**50.8**	***2.7***
Sub-total, South Norfolk - Norwich urban area		**35.9**	**1.7**	**3.5**	**3.1**	**14.2**	**16.8**	**10.5**	**1.6**	**0.0**	**0.0**	**0.0**	**0.5**	**0.0**	**1.4**	**2.8**	**92.0**	***5.0***
Diss stores																		
Aldi, Mere Street, Diss	Town Centre	0.6	0.0	0.0	0.0	0.0	1.7	0.0	0.0	0.0	0.0	0.0	1.6	21.2	0.0	0.0	**25.2**	***1.4***
Morrisons, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.9	1.9	0.0	0.0	0.0	0.0	0.5	3.8	39.0	0.2	0.0	**46.4**	***2.5***
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.0	1.4	0.0	0.0	0.0	0.0	0.0	1.8	23.1	0.0	0.0	**26.3**	***1.4***
Sub-total, Diss stores		**0.6**	**0.0**	**0.0**	**0.0**	**0.9**	**5.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**7.2**	**83.4**	**0.2**	**0.0**	**97.9**	***5.3***
Harleston stores																		
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	5.6	0.8	0.0	0.0	**6.6**	***0.4***
Co-Op, Market Place, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.0	0.0	0.0	**0.8**	***0.0***
Co-Op, London, Road, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.4	0.0	0.0	0.0	**2.2**	***0.1***
Sub-total, Harleston stores		**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**7.8**	**0.8**	**0.0**	**0.0**	**9.7**	***0.5***
Wymondham stores																		
Co-Op, Market Place, Wymondham	Town Centre	0.0	1.0	0.0	0.0	0.0	3.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	***0.3***
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	0.4	12.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.7	0.4	**17.9**	***1.0***
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	1.0	28.9	0.0	0.1	0.9	0.0	0.0	0.0	0.0	4.0	0.0	**34.8**	***1.9***
Sub-total, Wymodham stores		**0.0**	**1.0**	**0.0**	**0.0**	**1.5**	**44.9**	**0.0**	**0.1**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**8.7**	**0.4**	**57.5**	***3.1***
Other stores																		
Co-Op, Church Plain, Loddon	Town Centre	0.0	0.0	0.0	0.0	8.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.2**	***0.4***
Co-Op, The Street, Long Stratton	Town Centre	0.0	0.0	0.0	0.0	1.3	10.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**11.5**	***0.6***
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	5.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	***0.3***
Sub-total, other stores		**0.0**	**0.0**	**0.0**	**0.0**	**15.3**	**10.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**25.5**	***1.4***
Sub-total, South Norfolk area		**36.5**	**2.7**	**3.5**	**3.1**	**31.9**	**77.3**	**10.5**	**1.6**	**0.9**	**0.0**	**1.2**	**15.6**	**84.1**	**10.3**	**3.3**	**282.6**	***15.2***
Broadland area stores																		
Norwich urban area stores																		
Sainsbury's, Pound Lane, Norwich	District Centre	1.0	3.3	4.7	18.9	0.9	0.2	0.6	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.5	**30.6**	**1.6**
Morrisons, The Paddocks, Spixworth	District Centre	0.0	0.2	8.3	1.2	0.0	0.5	4.2	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**14.6**	**0.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0	10.4	22.7	12.9	0.6	0.7	6.0	0.5	1.9	1.8	0.0	0.0	0.0	0.0	0.0	**57.6**	**3.1**
Tesco, Drayton	Out of centre	0.0	0.0	0.8	0.0	0.0	0.0	16.4	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**17.4**	**0.9**
Sub-total, Broadland - Norwich urban area		**1.0**	**13.9**	**36.4**	**33.1**	**1.5**	**1.5**	**27.2**	**1.1**	**1.9**	**2.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**120.3**	**6.5**
Rural Broadland																		
Co-Op, Acle	In-centre	0.0	0.0	0.0	7.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.6**	**0.4**
Budgens, Acle	Out of centre	0.0	0.0	0.0	6.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.5**	**0.3**
Budgens, Norwich Road, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.1**
Co-Op, Market Place, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	**2.1**	**0.1**
Tesco, Aylesham	Out of centre	0.0	0.6	2.1	0.0	0.0	0.0	0.6	15.7	1.3	0.0	0.0	0.0	0.0	0.0	0.4	**20.8**	**1.1**
Co-Op, Horsford	Out of centre	0.0	0.0	0.0	0.0	0.0	0.0	5.1	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	**0.3**
Sub-total, Rural Broadland		**0.0**	**0.6**	**2.1**	**14.0**	**0.0**	**0.0**	**5.8**	**20.1**	**1.9**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**45.0**	**2.4**
Sub-total, Broadland area		**1.0**	**14.6**	**38.5**	**47.1**	**1.5**	**1.5**	**33.0**	**21.2**	**3.9**	**2.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**165.3**	**8.9**
(Total for Norwich urban area stores)		***124.9***	***100.7***	***79.4***	***51.3***	***32.5***	***28.6***	***62.5***	***10.6***	***7.9***	***2.6***	***1.1***	***1.0***	***0.4***	***2.4***	***5.1***	***511.1***	***27.5***
TOTAL GREATER NORWICH MAIN STORES		**125.5**	**102.4**	**81.5**	**65.3**	**50.2**	**89.2**	**68.3**	**30.8**	**10.8**	**2.6**	**2.3**	**16.1**	**84.5**	**11.3**	**5.9**	**746.7**	**40.2**
North Walsham foodstores		0.0	0.0	1.1	0.8	0.0	0.0	0.1	5.3	57.8	9.9	0.0	0.0	0.0	0.0	0.0	**75.0**	**4.0**
Cromer/Sheringham foodstores		0.0	0.0	0.4	0.0	0.0	0.0	0.2	0.4	29.2	0.0	0.0	0.0	0.0	0.0	0.0	**30.2**	**1.6**
Great Yarmouth/Caistor-on-Sea foodstores		0.0	0.4	0.0	25.7	0.2	0.0	0.3	0.1	1.2	151.7	5.7	0.0	0.0	0.0	0.0	**185.2**	**10.0**
Lowestoft foodstores		0.4	0.0	0.0	0.0	3.5	0.0	0.0	0.0	0.0	11.9	131.7	0.0	0.0	0.0	0.0	**147.5**	**7.9**
Beccles foodstores		0.0	0.0	0.0	0.0	21.0	0.8	0.0	0.0	0.0	1.5	60.3	0.8	1.4	0.0	0.0	**85.7**	**4.6**
Thetford foodstores		0.0	0.0	0.0	0.0	0.4	0.7	0.0	0.0	0.0	0.0	0.0	0.0	6.3	61.1	0.0	**68.5**	**3.7**
Dereham foodstores		0.9	0.0	0.0	0.0	0.0	0.5	2.8	1.4	0.2	0.0	0.0	0.0	0.0	16.2	67.4	**89.5**	**4.8**
Fakenham foodstores		0.0	0.0	0.0	0.0	0.0	0.0	0.8	0.6	11.3	0.0	0.0	0.6	0.4	0.0	44.3	**58.0**	**3.1**
Other/local shops in survey area		34.2	19.5	9.3	18.0	17.5	10.3	16.1	6.1	27.2	57.0	45.6	2.1	15.3	22.7	11.7	**312.5**	**16.8**
Other/local shops outside survey area		2.7	2.2	1.1	0.0	0.0	5.2	0.0	0.2	0.4	1.4	8.2	0.0	8.8	20.5	7.2	**57.9**	**3.1**
OVERALL TOTAL		**163.7**	**124.5**	**93.4**	**109.7**	**92.8**	**106.6**	**88.6**	**44.8**	**138.2**	**236.0**	**253.7**	**19.5**	**116.8**	**131.8**	**136.4**	**1,856.8**	**100.0**

Source: Table 3, Table 4

Convenience Need Assessment

Greater Norwich zones

Table 5c
Convenience Goods Allocation 2030 - Spend (£) 2014 Prices

Zone Centre/Store	Policy Allocation	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2030		**167.0**	**126.1**	**94.1**	**111.0**	**94.7**	**109.7**	**90.7**	**45.3**	**139.7**	**238.5**	**254.1**	**19.9**	**118.7**	**134.2**	**138.4**	**1,882.2**	***100.0***
Norwich City Council area stores																		
Norwich city centre stores																		
Other stores, Norwich City Centre	City Centre	7.4	5.3	1.7	1.1	0.3	0.2	0.3	0.2	3.1	0.0	0.0	0.0	0.0	0.0	0.5	**20.1**	***1.1***
District/Local centes																		
Morrisons, Riverside	District Centre	3.4	18.1	10.1	3.8	6.9	0.7	3.1	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**47.1**	***2.5***
Waitrose, Eaton Centre	District Centre	28.7	1.6	0.0	1.6	2.7	0.0	0.5	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**35.5**	***1.9***
Asda, Hall Road	District Centre	10.6	4.7	1.0	3.4	2.8	5.9	2.2	3.3	1.3	0.0	0.0	0.4	0.4	1.0	0.0	**37.0**	***2.0***
Aldi, Larkman Lane	District Centre	11.2	0.0	0.0	0.2	0.7	1.4	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.3	**16.7**	***0.9***
Aldi, Sprowston Road	District Centre	4.6	10.9	10.8	0.7	0.7	0.0	2.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**30.8**	***1.6***
Aldi, Plumstead Road	District Centre	0.0	8.6	1.2	4.6	0.2	0.5	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**16.0**	***0.8***
Lidl, Drayton Road	District Centre	1.1	3.6	0.4	0.0	0.5	0.5	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.1**	***0.4***
Iceland, Anglia Square	District Centre	0.7	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.3**	***0.3***
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	6.9	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.1**	***0.4***
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.3	3.7	1.0	0.0	0.0	0.0	0.3	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.0**	***0.4***
Other stores																		
Sainsbury's, Brazen Gate	Edge of Centre	9.7	16.6	0.9	0.0	2.3	1.4	0.0	0.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	**32.1**	***1.7***
Asda, Drayton High Road, Hellesdon	Out of Centre	5.5	8.3	12.7	0.0	0.0	0.2	11.9	0.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0	**40.8**	***2.2***
Sub-total, Norwich City Council area		**89.8**	**86.2**	**39.8**	**15.4**	**17.1**	**10.7**	**25.3**	**8.0**	**6.1**	**0.5**	**1.1**	**0.5**	**0.4**	**1.0**	**1.8**	**303.6**	***16.1***
South Norfolk area stores																		
Norwich urban area stores																		
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	12.1	1.7	0.0	1.0	13.9	10.9	0.8	0.0	0.0	0.0	0.0	0.3	0.0	1.4	0.0	**42.1**	***2.2***
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	24.5	0.0	3.5	2.1	0.6	6.4	10.0	1.6	0.0	0.0	0.0	0.2	0.0	0.0	2.9	**51.8**	***2.8***
Sub-total, South Norfolk - Norwich urban area		**36.7**	**1.7**	**3.5**	**3.1**	**14.5**	**17.2**	**10.8**	**1.6**	**0.0**	**0.0**	**0.0**	**0.6**	**0.0**	**1.4**	**2.9**	**93.9**	***5.0***
Diss stores																		
Aldi, Mere Street, Diss	Town Centre	0.6	0.0	0.0	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	1.7	21.6	0.0	0.0	**25.6**	***1.4***
Morrisons, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.9	2.0	0.0	0.0	0.0	0.0	0.5	3.9	39.7	0.2	0.0	**47.1**	***2.5***
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	1.8	23.5	0.0	0.0	**26.8**	***1.4***
Sub-total, Diss stores		**0.6**	**0.0**	**0.0**	**0.0**	**0.9**	**5.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**7.4**	**84.8**	**0.2**	**0.0**	**99.6**	***5.3***
Harleston stores																		
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	5.6	0.8	0.0	0.0	**6.7**	***0.4***
Co-Op, Market Place, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	**0.9**	***0.0***
Co-Op, London, Road, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.4	0.0	0.0	0.0	**2.2**	***0.1***
Sub-total, Harleston stores		**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**7.9**	**0.8**	**0.0**	**0.0**	**9.8**	***0.5***
Wymondham stores																		
Co-Op, Market Place, Wymondham	Town Centre	0.0	1.0	0.0	0.0	0.0	3.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	***0.3***
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	0.5	12.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.8	0.4	**18.3**	***1.0***
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	1.1	29.7	0.0	0.1	0.9	0.0	0.0	0.0	0.0	4.0	0.0	**35.8**	***1.9***
Sub-total, Wymodham stores		**0.0**	**1.0**	**0.0**	**0.0**	**1.5**	**46.2**	**0.0**	**0.1**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**8.9**	**0.4**	**59.1**	***3.1***
Other stores																		
Co-Op, Church Plain, Loddon	Town Centre	0.0	0.0	0.0	0.0	8.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.4**	***0.4***
Co-Op, The Street, Long Stratton	Town Centre	0.0	0.0	0.0	0.0	1.3	10.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**11.8**	***0.6***
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	5.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.9**	***0.3***
Sub-total, other stores		**0.0**	**0.0**	**0.0**	**0.0**	**15.6**	**10.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**26.1**	***1.4***
Sub-total, South Norfolk area		**37.3**	**2.7**	**3.5**	**3.1**	**32.5**	**79.5**	**10.8**	**1.7**	**0.9**	**0.0**	**1.2**	**15.9**	**85.5**	**10.5**	**3.3**	**288.4**	***15.3***
Broadland area stores																		
Norwich urban area stores																		
Sainsbury's, Pound Lane, Norwich	District Centre	1.0	3.3	4.7	19.1	1.0	0.2	0.6	0.1	0.0	0.4	0.0	0.0	0.0	0.0	0.5	**31.0**	**1.6**
Morrisons, The Paddocks, Spixworth	District Centre	0.0	0.2	8.4	1.2	0.0	0.5	4.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**14.8**	**0.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0	10.6	22.9	13.1	0.6	0.8	6.2	0.5	2.0	1.8	0.0	0.0	0.0	0.0	0.0	**58.3**	**3.1**
Tesco, Drayton	Out of centre	0.0	0.0	0.8	0.0	0.0	0.0	16.8	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**17.8**	**0.9**
Sub-total, Broadland - Norwich urban area		**1.0**	**14.1**	**36.7**	**33.4**	**1.5**	**1.5**	**27.9**	**1.1**	**2.0**	**2.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**122.0**	**6.5**
Rural Broadland																		
Co-Op, Acle	In-centre	0.0	0.0	0.0	7.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.7**	**0.4**
Budgens, Acle	Out of centre	0.0	0.0	0.0	6.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.5**	**0.3**
Budgens, Norwich Road, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.7**	**0.1**
Co-Op, Market Place, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.6	0.0	0.0	0.0	0.0	0.0	0.0	**2.1**	**0.1**
Tesco, Aylesham	Out of centre	0.0	0.7	2.1	0.0	0.0	0.0	0.6	15.8	1.3	0.0	0.0	0.0	0.0	0.0	0.4	**21.0**	**1.1**
Co-Op, Horsford	Out of centre	0.0	0.0	0.0	0.0	0.0	0.0	5.3	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	**0.3**
Sub-total, Rural Broadland		**0.0**	**0.7**	**2.1**	**14.2**	**0.0**	**0.0**	**5.9**	**20.3**	**2.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**45.5**	**2.4**
Sub-total, Broadland area		**1.0**	**14.8**	**38.8**	**47.6**	**1.5**	**1.5**	**33.8**	**21.4**	**3.9**	**2.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**167.5**	**8.9**
(Total for Norwich urban area stores)		***127.5***	***102.0***	***80.0***	***51.9***	***33.2***	***29.5***	***64.0***	***10.7***	***8.0***	***2.6***	***1.1***	***1.0***	***0.4***	***2.5***	***5.2***	***519.5***	***27.6***
TOTAL GREATER NORWICH MAIN STORES		**128.1**	**103.7**	**82.1**	**66.1**	**51.2**	**91.8**	**69.9**	**31.1**	**10.9**	**2.6**	**2.3**	**16.3**	**85.9**	**11.5**	**6.0**	**759.5**	**40.4**
North Walsham foodstores		0.0	0.0	1.1	0.8	0.0	0.0	0.1	5.3	58.5	10.0	0.0	0.0	0.0	0.0	0.0	**75.8**	**4.0**
Cromer/Sheringham foodstores		0.0	0.0	0.4	0.0	0.0	0.0	0.2	0.4	29.6	0.0	0.0	0.0	0.0	0.0	0.0	**30.6**	**1.6**
Great Yarmouth/Caistor-on-Sea foodstores		0.0	0.4	0.0	25.9	0.2	0.0	0.3	0.1	1.3	153.3	5.7	0.0	0.0	0.0	0.0	**187.1**	**9.9**
Lowestoft foodstores		0.4	0.0	0.0	0.0	3.6	0.0	0.0	0.0	0.0	12.1	131.9	0.0	0.0	0.0	0.0	**147.9**	**7.9**
Beccles foodstores		0.0	0.0	0.0	0.0	21.4	0.8	0.0	0.0	0.0	1.5	60.4	0.8	1.4	0.0	0.0	**86.3**	**4.6**
Thetford foodstores		0.0	0.0	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	6.4	62.2	0.0	**69.7**	**3.7**
Dereham foodstores		0.9	0.0	0.0	0.0	0.0	0.6	2.9	1.4	0.2	0.0	0.0	0.0	0.0	16.5	68.4	**90.9**	**4.8**
Fakenham foodstores		0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.6	11.4	0.0	0.0	0.6	0.4	0.0	44.9	**58.8**	**3.1**
Other/local shops in survey area		34.9	19.8	9.4	18.2	17.8	10.6	16.5	6.2	27.5	57.6	45.6	2.2	15.6	23.1	11.8	**316.7**	**16.8**
Other/local shops outside survey area		2.7	2.2	1.2	0.0	0.0	5.4	0.0	0.2	0.4	1.4	8.2	0.0	9.0	20.9	7.3	**58.8**	**3.1**
OVERALL TOTAL		**167.0**	**126.1**	**94.1**	**111.0**	**94.7**	**109.7**	**90.7**	**45.3**	**139.7**	**238.5**	**254.1**	**19.9**	**118.7**	**134.2**	**138.4**	**1,882.2**	**100.0**

Source: Table 3, Table 4

Greater Norwich zones

Table 5d
Convenience Goods Allocation 2035 - Spend (£) 2014 Prices

Zone Centre/Store	Policy Allocation	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2035		**172.1**	**128.9**	**95.9**	**113.7**	**98.1**	**114.3**	**93.9**	**46.3**	**142.8**	**243.8**	**257.3**	**20.6**	**122.1**	**138.3**	**142.3**	**1,930.3**	***100.0***
Norwich City Council area stores																		
Norwich city centre stores																		
Other stores, Norwich City Centre	City Centre	7.6	5.4	1.7	1.1	0.3	0.2	0.3	0.2	3.2	0.0	0.0	0.0	0.0	0.0	0.5	**20.6**	***1.1***
District/Local centes																		
Morrisons, Riverside	District Centre	3.5	18.5	10.3	3.9	7.2	0.7	3.2	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**48.3**	***2.5***
Waitrose, Eaton Centre	District Centre	29.6	1.7	0.0	1.6	2.8	0.0	0.5	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**36.5**	***1.9***
Asda, Hall Road	District Centre	10.9	4.8	1.0	3.5	2.9	6.1	2.3	3.3	1.3	0.0	0.0	0.4	0.4	1.1	0.0	**38.1**	***2.0***
Aldi, Larkman Lane	District Centre	11.5	0.0	0.0	0.2	0.7	1.4	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.4	**17.2**	***0.9***
Aldi, Sprowston Road	District Centre	4.7	11.2	11.0	0.7	0.7	0.0	2.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.6**	***1.6***
Aldi, Plumstead Road	District Centre	0.0	8.8	1.2	4.7	0.2	0.5	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**16.4**	***0.8***
Lidl, Drayton Road	District Centre	1.1	3.7	0.4	0.0	0.5	0.5	1.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.3**	***0.4***
Iceland, Anglia Square	District Centre	0.7	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.4**	***0.3***
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	7.1	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.4**	***0.4***
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.3	3.8	1.0	0.0	0.0	0.0	0.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.1**	***0.4***
Other stores																		
Sainsbury's, Brazen Gate	Edge of Centre	10.0	17.0	0.9	0.0	2.4	1.4	0.0	0.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	**32.9**	***1.7***
Asda, Drayton High Road, Hellesdon	Out of Centre	5.7	8.5	12.9	0.0	0.0	0.2	12.3	0.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0	**41.8**	***2.2***
Sub-total, Norwich City Council area		**92.6**	**88.1**	**40.5**	**15.7**	**17.7**	**11.1**	**26.2**	**8.2**	**6.2**	**0.5**	**1.1**	**0.5**	**0.4**	**1.1**	**1.9**	**311.8**	***16.2***
South Norfolk area stores																		
Norwich urban area stores																		
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	12.5	1.7	0.0	1.1	14.4	11.3	0.8	0.0	0.0	0.0	0.0	0.4	0.0	1.5	0.0	**43.6**	***2.3***
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	25.3	0.0	3.6	2.1	0.6	6.6	10.4	1.6	0.0	0.0	0.0	0.2	0.0	0.0	3.0	**53.4**	***2.8***
Sub-total, South Norfolk - Norwich urban area		**37.8**	**1.7**	**3.6**	**3.2**	**15.0**	**18.0**	**11.2**	**1.6**	**0.0**	**0.0**	**0.0**	**0.6**	**0.0**	**1.5**	**3.0**	**97.0**	***5.0***
Diss stores																		
Aldi, Mere Street, Diss	Town Centre	0.6	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	1.7	22.2	0.0	0.0	**26.4**	***1.4***
Morrisons, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	1.0	2.1	0.0	0.0	0.0	0.0	0.5	4.0	40.8	0.2	0.0	**48.6**	***2.5***
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	1.9	24.2	0.0	0.0	**27.6**	***1.4***
Sub-total, Diss stores		**0.6**	**0.0**	**0.0**	**0.0**	**1.0**	**5.4**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**7.6**	**87.2**	**0.2**	**0.0**	**102.6**	***5.3***
Harleston stores																		
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	5.8	0.8	0.0	0.0	**7.0**	***0.4***
Co-Op, Market Place, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	**0.9**	***0.0***
Co-Op, London, Road, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.5	0.0	0.0	0.0	**2.3**	***0.1***
Sub-total, Harleston stores		**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**8.2**	**0.8**	**0.0**	**0.0**	**10.2**	***0.5***
Wymondham stores																		
Co-Op, Market Place, Wymondham	Town Centre	0.0	1.0	0.0	0.0	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	***0.3***
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	0.5	13.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.9	0.5	**19.0**	***1.0***
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	1.1	30.9	0.0	0.1	0.9	0.0	0.0	0.0	0.0	4.2	0.0	**37.2**	***1.9***
Sub-total, Wymodham stores		**0.0**	**1.0**	**0.0**	**0.0**	**1.6**	**48.2**	**0.0**	**0.1**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**9.1**	**0.5**	**61.4**	***3.2***
Other stores																		
Co-Op, Church Plain, Loddon	Town Centre	0.0	0.0	0.0	0.0	8.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.7**	***0.4***
Co-Op, The Street, Long Stratton	Town Centre	0.0	0.0	0.0	0.0	1.4	11.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**12.3**	***0.6***
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.1**	***0.3***
Sub-total, other stores		**0.0**	**0.0**	**0.0**	**0.0**	**16.1**	**11.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**27.1**	***1.4***
Sub-total, South Norfolk area		**38.4**	**2.8**	**3.6**	**3.2**	**33.7**	**82.9**	**11.2**	**1.7**	**0.9**	**0.0**	**1.3**	**16.4**	**88.0**	**10.8**	**3.4**	**298.2**	***15.4***
Broadland area stores																		
Norwich urban area stores																		
Sainsbury's, Pound Lane, Norwich	District Centre	1.0	3.4	4.8	19.6	1.0	0.2	0.6	0.2	0.0	0.4	0.0	0.0	0.0	0.0	0.5	**31.7**	**1.6**
Morrisons, The Paddocks, Spixworth	District Centre	0.0	0.2	8.5	1.3	0.0	0.6	4.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**15.2**	**0.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0	10.8	23.3	13.4	0.6	0.8	6.4	0.5	2.0	1.8	0.0	0.0	0.0	0.0	0.0	**59.7**	**3.1**
Tesco, Drayton	Out of centre	0.0	0.0	0.8	0.0	0.0	0.0	17.3	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**18.4**	**1.0**
Sub-total, Broadland - Norwich urban area		**1.0**	**14.4**	**37.4**	**34.2**	**1.6**	**1.6**	**28.9**	**1.2**	**2.0**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**125.0**	**6.5**
Rural Broadland																		
Co-Op, Acle	In-centre	0.0	0.0	0.0	7.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.8**	**0.4**
Budgens, Acle	Out of centre	0.0	0.0	0.0	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.7**	**0.3**
Budgens, Norwich Road, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.1**
Co-Op, Market Place, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	**2.2**	**0.1**
Tesco, Aylesham	Out of centre	0.0	0.7	2.2	0.0	0.0	0.0	0.7	16.2	1.4	0.0	0.0	0.0	0.0	0.0	0.4	**21.5**	**1.1**
Co-Op, Horsford	Out of centre	0.0	0.0	0.0	0.0	0.0	0.0	5.4	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.7**	**0.3**
Sub-total, Rural Broadland		**0.0**	**0.7**	**2.2**	**14.5**	**0.0**	**0.0**	**6.1**	**20.8**	**2.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**46.7**	**2.4**
Sub-total, Broadland area		**1.0**	**15.1**	**39.6**	**48.8**	**1.6**	**1.6**	**35.0**	**21.9**	**4.0**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**171.7**	**8.9**
(Total for Norwich urban area stores)		***131.4***	***104.3***	***81.5***	***53.1***	***34.4***	***30.7***	***66.2***	***11.0***	***8.2***	***2.7***	***1.1***	***1.1***	***0.4***	***2.5***	***5.3***	***533.8***	***27.7***
TOTAL GREATER NORWICH MAIN STORES		**132.0**	**106.0**	**83.6**	**67.7**	**53.0**	**95.6**	**72.3**	**31.8**	**11.1**	**2.7**	**2.3**	**16.9**	**88.4**	**11.9**	**6.2**	**781.7**	**40.5**
North Walsham foodstores		0.0	0.0	1.1	0.8	0.0	0.0	0.2	5.5	59.8	10.2	0.0	0.0	0.0	0.0	0.0	**77.5**	**4.0**
Cromer/Sheringham foodstores		0.0	0.0	0.5	0.0	0.0	0.0	0.2	0.4	30.2	0.0	0.0	0.0	0.0	0.0	0.0	**31.2**	**1.6**
Great Yarmouth/Caistor-on-Sea foodstores		0.0	0.4	0.0	26.6	0.2	0.0	0.3	0.1	1.3	156.7	5.7	0.0	0.0	0.0	0.0	**191.2**	**9.9**
Lowestoft foodstores		0.4	0.0	0.0	0.0	3.7	0.0	0.0	0.0	0.0	12.3	133.6	0.0	0.0	0.0	0.0	**150.0**	**7.8**
Beccles foodstores		0.0	0.0	0.0	0.0	22.2	0.8	0.0	0.0	0.0	1.5	61.1	0.8	1.5	0.0	0.0	**88.0**	**4.6**
Thetford foodstores		0.0	0.0	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	6.6	64.1	0.0	**71.8**	**3.7**
Dereham foodstores		1.0	0.0	0.0	0.0	0.0	0.6	3.0	1.5	0.2	0.0	0.0	0.0	0.0	17.0	70.3	**93.5**	**4.8**
Fakenham foodstores		0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.6	11.7	0.0	0.0	0.6	0.5	0.0	46.2	**60.4**	**3.1**
Other/local shops in survey area		36.0	20.2	9.5	18.6	18.5	11.0	17.0	6.3	28.1	58.9	46.2	2.3	16.0	23.8	12.2	**324.6**	**16.8**
Other/local shops outside survey area		2.8	2.3	1.2	0.0	0.0	5.6	0.0	0.2	0.4	1.4	8.4	0.0	9.2	21.5	7.5	**60.4**	**3.1**
OVERALL TOTAL		**172.1**	**128.9**	**95.9**	**113.7**	**98.1**	**114.3**	**93.9**	**46.3**	**142.8**	**243.8**	**257.3**	**20.6**	**122.1**	**138.3**	**142.3**	**1,930.3**	**100.0**

Source: Table 3, Table 4

Convenience Need Assessment

Greater Norwich zones

Table 5e

Convenience Goods Allocation 2038 - Spend (£) 2014 Prices

Zone Centre/Store	Policy Allocation	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2038		**174.0**	**130.6**	**96.7**	**114.4**	**98.5**	**115.3**	**94.9**	**46.4**	**144.1**	**245.9**	**259.1**	**20.6**	**122.5**	**139.9**	**143.1**	**1,946.0**	***100.0***
Norwich City Council area stores																		
Norwich city centre stores																		
Other stores, Norwich City Centre	City Centre	7.7	5.5	1.7	1.2	0.4	0.2	0.3	0.2	3.2	0.0	0.0	0.0	0.0	0.0	0.5	**20.8**	***1.1***
District/Local centes																		
Morrisons, Riverside	District Centre	3.5	18.7	10.4	3.9	7.2	0.8	3.3	0.5	0.0	0.5	0.0	0.0	0.0	0.0	0.0	**48.8**	***2.5***
Waitrose, Eaton Centre	District Centre	29.9	1.7	0.0	1.6	2.8	0.0	0.5	0.2	0.0	0.0	0.0	0.1	0.0	0.0	0.0	**36.9**	***1.9***
Asda, Hall Road	District Centre	11.0	4.9	1.0	3.6	2.9	6.2	2.3	3.3	1.3	0.0	0.0	0.4	0.4	1.1	0.0	**38.4**	***2.0***
Aldi, Larkman Lane	District Centre	11.6	0.0	0.0	0.2	0.7	1.4	1.8	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.4	**17.4**	***0.9***
Aldi, Sprowston Road	District Centre	4.7	11.3	11.1	0.7	0.7	0.0	2.6	0.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**31.9**	***1.6***
Aldi, Plumstead Road	District Centre	0.0	8.9	1.3	4.7	0.2	0.5	0.7	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**16.5**	***0.9***
Lidl, Drayton Road	District Centre	1.1	3.8	0.4	0.0	0.5	0.5	1.9	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.4**	***0.4***
Iceland, Anglia Square	District Centre	0.7	4.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.5**	***0.3***
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	7.1	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.4**	***0.4***
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	0.3	3.8	1.1	0.0	0.0	0.0	0.3	1.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.2**	***0.4***
Other stores																		
Sainsbury's, Brazen Gate	Edge of Centre	10.1	17.2	0.9	0.0	2.4	1.4	0.0	0.2	0.0	0.0	1.1	0.0	0.0	0.0	0.0	**33.3**	***1.7***
Asda, Drayton High Road, Hellesdon	Out of Centre	5.7	8.6	13.0	0.0	0.0	0.2	12.4	0.6	1.7	0.0	0.0	0.0	0.0	0.0	0.0	**42.3**	***2.2***
Sub-total, Norwich City Council area		**93.5**	**89.3**	**40.8**	**15.8**	**17.8**	**11.2**	**26.5**	**8.2**	**6.3**	**0.5**	**1.1**	**0.5**	**0.4**	**1.1**	**1.9**	**314.9**	***16.2***
South Norfolk area stores																		
Norwich urban area stores																		
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	12.6	1.8	0.0	1.1	14.4	11.4	0.8	0.0	0.0	0.0	0.0	0.4	0.0	1.5	0.0	**43.9**	***2.3***
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	25.6	0.0	3.6	2.1	0.6	6.7	10.5	1.6	0.0	0.0	0.0	0.2	0.0	0.0	3.0	**53.9**	***2.8***
Sub-total, South Norfolk - Norwich urban area		**38.2**	**1.8**	**3.6**	**3.2**	**15.1**	**18.1**	**11.3**	**1.6**	**0.0**	**0.0**	**0.0**	**0.6**	**0.0**	**1.5**	**3.0**	**97.9**	***5.0***
Diss stores																		
Aldi, Mere Street, Diss	Town Centre	0.6	0.0	0.0	0.0	0.0	1.9	0.0	0.0	0.0	0.0	0.0	1.7	22.3	0.0	0.0	**26.5**	***1.4***
Morrisons, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	1.0	2.1	0.0	0.0	0.0	0.0	0.5	4.0	40.9	0.2	0.0	**48.7**	***2.5***
Tesco Superstore, Victoria Road, Diss	Edge of Centre	0.0	0.0	0.0	0.0	0.0	1.5	0.0	0.0	0.0	0.0	0.0	1.9	24.3	0.0	0.0	**27.7**	***1.4***
Sub-total, Diss stores		**0.6**	**0.0**	**0.0**	**0.0**	**1.0**	**5.5**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**7.6**	**87.4**	**0.2**	**0.0**	**102.8**	***5.3***
Harleston stores																		
Budgens, Bullock Fair Close, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	5.8	0.8	0.0	0.0	**7.0**	***0.4***
Co-Op, Market Place, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.0	0.0	0.0	**0.9**	***0.0***
Co-Op, London, Road, Harleston	Edge of Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	1.5	0.0	0.0	0.0	**2.3**	***0.1***
Sub-total, Harleston stores		**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.3**	**0.0**	**0.0**	**0.0**	**0.0**	**0.8**	**8.2**	**0.8**	**0.0**	**0.0**	**10.2**	***0.5***
Wymondham stores																		
Co-Op, Market Place, Wymondham	Town Centre	0.0	1.1	0.0	0.0	0.0	4.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.2**	***0.3***
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	0.5	13.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.0	0.5	**19.2**	***1.0***
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	1.1	31.2	0.0	0.1	0.9	0.0	0.0	0.0	0.0	4.2	0.0	**37.5**	***1.9***
Sub-total, Wymodham stores		**0.0**	**1.1**	**0.0**	**0.0**	**1.6**	**48.6**	**0.0**	**0.1**	**0.9**	**0.0**	**0.0**	**0.0**	**0.0**	**9.2**	**0.5**	**61.9**	***3.2***
Other stores																		
Co-Op, Church Plain, Loddon	Town Centre	0.0	0.0	0.0	0.0	8.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**8.7**	***0.4***
Co-Op, The Street, Long Stratton	Town Centre	0.0	0.0	0.0	0.0	1.4	11.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**12.4**	***0.6***
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	0.0	0.0	0.0	0.0	6.1	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.1**	***0.3***
Sub-total, other stores		**0.0**	**0.0**	**0.0**	**0.0**	**16.2**	**11.1**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**27.3**	***1.4***
Sub-total, South Norfolk area		**38.8**	**2.8**	**3.6**	**3.2**	**33.8**	**83.6**	**11.3**	**1.7**	**0.9**	**0.0**	**1.3**	**16.4**	**88.2**	**10.9**	**3.4**	**300.1**	***15.4***
Broadland area stores																		
Norwich urban area stores																		
Sainsbury's, Pound Lane, Norwich	District Centre	1.1	3.4	4.9	19.7	1.0	0.2	0.7	0.2	0.0	0.4	0.0	0.0	0.0	0.0	0.5	**32.0**	**1.6**
Morrisons, The Paddocks, Spixworth	District Centre	0.0	0.2	8.6	1.3	0.0	0.6	4.5	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**15.3**	**0.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	0.0	10.9	23.5	13.5	0.6	0.8	6.5	0.5	2.0	1.8	0.0	0.0	0.0	0.0	0.0	**60.2**	**3.1**
Tesco, Drayton	Out of centre	0.0	0.0	0.8	0.0	0.0	0.0	17.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**18.6**	**1.0**
Sub-total, Broadland - Norwich urban area		**1.1**	**14.6**	**37.7**	**34.5**	**1.6**	**1.6**	**29.2**	**1.2**	**2.0**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.5**	**126.2**	**6.5**
Rural Broadland																		
Co-Op, Acle	In-centre	0.0	0.0	0.0	7.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**7.9**	**0.4**
Budgens, Acle	Out of centre	0.0	0.0	0.0	6.7	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**6.7**	**0.3**
Budgens, Norwich Road, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	2.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.8**	**0.1**
Co-Op, Market Place, Aylsham	In-centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.6	0.6	0.0	0.0	0.0	0.0	0.0	0.0	**2.2**	**0.1**
Tesco, Aylesham	Out of centre	0.0	0.7	2.2	0.0	0.0	0.0	0.7	16.2	1.4	0.0	0.0	0.0	0.0	0.0	0.4	**21.6**	**1.1**
Co-Op, Horsford	Out of centre	0.0	0.0	0.0	0.0	0.0	0.0	5.5	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.8**	**0.3**
Sub-total, Rural Broadland		**0.0**	**0.7**	**2.2**	**14.6**	**0.0**	**0.0**	**6.2**	**20.8**	**2.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.0**	**0.4**	**46.9**	**2.4**
Sub-total, Broadland area		**1.1**	**15.3**	**39.9**	**49.1**	**1.6**	**1.6**	**35.4**	**22.0**	**4.1**	**2.2**	**0.0**	**0.0**	**0.0**	**0.0**	**0.9**	**173.1**	**8.9**
(Total for Norwich urban area stores)		***132.8***	***105.6***	***82.2***	***53.5***	***34.5***	***31.0***	***67.0***	***11.0***	***8.3***	***2.7***	***1.1***	***1.1***	***0.4***	***2.6***	***5.3***	***538.9***	***27.7***
TOTAL GREATER NORWICH MAIN STORES		**133.4**	**107.4**	**84.3**	**68.1**	**53.3**	**96.5**	**73.2**	**31.9**	**11.2**	**2.7**	**2.4**	**16.9**	**88.6**	**12.0**	**6.2**	**788.1**	**40.5**
North Walsham foodstores		0.0	0.0	1.1	0.8	0.0	0.0	0.2	5.5	60.3	10.3	0.0	0.0	0.0	0.0	0.0	**78.2**	**4.0**
Cromer/Sheringham foodstores		0.0	0.0	0.5	0.0	0.0	0.0	0.2	0.4	30.5	0.0	0.0	0.0	0.0	0.0	0.0	**31.5**	**1.6**
Great Yarmouth/Caistor-on-Sea foodstores		0.0	0.4	0.0	26.7	0.2	0.0	0.3	0.1	1.3	158.0	5.8	0.0	0.0	0.0	0.0	**192.8**	**9.9**
Lowestoft foodstores		0.4	0.0	0.0	0.0	3.8	0.0	0.0	0.0	0.0	12.4	134.5	0.0	0.0	0.0	0.0	**151.1**	**7.8**
Beccles foodstores		0.0	0.0	0.0	0.0	22.3	0.8	0.0	0.0	0.0	1.6	61.6	0.8	1.5	0.0	0.0	**88.5**	**4.5**
Thetford foodstores		0.0	0.0	0.0	0.0	0.5	0.7	0.0	0.0	0.0	0.0	0.0	0.0	6.6	64.9	0.0	**72.6**	**3.7**
Dereham foodstores		1.0	0.0	0.0	0.0	0.0	0.6	3.0	1.5	0.2	0.0	0.0	0.0	0.0	17.2	70.7	**94.2**	**4.8**
Fakenham foodstores		0.0	0.0	0.0	0.0	0.0	0.0	0.9	0.6	11.8	0.0	0.0	0.6	0.5	0.0	46.4	**60.8**	**3.1**
Other/local shops in survey area		36.3	20.5	9.6	18.8	18.5	11.1	17.2	6.3	28.4	59.4	46.5	2.3	16.1	24.1	12.2	**327.3**	**16.8**
Other/local shops outside survey area		2.8	2.3	1.2	0.0	0.0	5.6	0.0	0.2	0.4	1.4	8.4	0.0	9.2	21.7	7.5	**60.9**	**3.1**
OVERALL TOTAL		**174.0**	**130.6**	**96.7**	**114.4**	**98.5**	**115.3**	**94.9**	**46.4**	**144.1**	**245.9**	**259.1**	**20.6**	**122.5**	**139.9**	**143.1**	**1,946.0**	**100.0**

Source: Table 3, Table 4

Table 6: Trading performance assessment of existing convenience goods floorspace

		Total floorspace (sq.m net)	Net Convenience Ratio (%)	Net Convenience Floorspace (sq m)	Company Average Sales Density (£ per sq m net)	Company Average Turnover (£m)	Household survey-derived turnover (£m)	Difference from company average turnover (£m)
Norwich city centre stores								
Other stores, Norwich City Centre	City Centre	6,278	95%	5,964	-	-	-	-
District/Local centes								
Morrisons, Riverside	District Centre	3,670	95%	3,487	12,656	44.1	47.7	3.6
Waitrose, Eaton Centre	District Centre	2,716	90%	2,444	12,940	31.6	35.5	3.9
Asda, Hall Road	District Centre	3,967	70%	2,777	13,659	37.9	37.1	-0.8
Aldi, Larkman Lane	District Centre	790	85%	672	10,827	7.3	16.6	9.4
Aldi, Sprowston Road	District Centre	790	85%	672	10,827	7.3	31.3	24.1
Aldi, Plumstead Road	District Centre	790	85%	672	10,827	7.3	16.3	9.0
Lidl, Drayton Road	District Centre	625	85%	531	10,103	5.4	8.2	2.8
Iceland, Anglia Square	District Centre	472	100%	472	6,859	3.2	5.4	2.2
Roys of Bowthorpe, Bowthorpe Main Centre, Wendene	District Centre	2,081	85%	1,769	7,000	12.4	7.2	-5.2
Lidl, Copenhagen Way (Aylsham Road)	Local Centre	1,260	85%	1,071	10,103	10.8	7.1	-3.7
Other stores								
Sainsbury's, Brazen Gate	Edge of Centre	3,427	75%	2,570	11,691	30.0	32.5	2.4
Asda, Drayton High Road, Hellesdon	Out of Centre	5,383	55%	2,961	13,659	40.4	41.2	0.8
Sub-total, Norwich City Council area		**32,249**		**26,060**	**-**	**237.8**	**286.1**	**48.3**
South Norfolk area stores								
Norwich urban area stores								
Tesco, Harford Bridge, Norwich	Out of centre [Norwich Urban Area]	3,809	75%	2,857	13,797	39.4	41.8	2.4
Sainsbury's, Longwater, Norwich	Out of centre [Norwich Urban Area]	4,610	65%	2,997	11,691	35.0	51.8	16.7
Sub-total, South Norfolk - Norwich urban area		**8,419**	-	**5,853**	-	**74.4**	**93.6**	**19.1**
Diss stores								
Aldi, Mere Street, Diss	Town Centre	900	85%	765	10,827	8.3	25.7	17.4
Morrisons, Victoria Road, Diss	Edge of Centre	3,433	85%	2,918	12,656	36.9	47.3	10.3
Tesco Superstore, Victoria Road, Diss	Edge of Centre	2,825	75%	2,119	13,797	29.2	26.8	-2.4
Sub-total, Diss stores		**7,158**	-	**5,802**	**12,832**	**74.4**	**99.8**	**25.4**
Harleston stores								
Budgens, Bullock Fair Close, Harleston	Edge of Centre	743	95%	706	7,804	5.5	6.7	1.2
Co-Op, Market Place, Harleston	Edge of Centre	500	100%	500	10,824	5.4	0.8	-4.6
Co-Op, London, Road, Harleston	Edge of Centre	500	100%	500	10,824	5.4	2.2	-3.2
Sub-total. Harleston stores		**1,743**	-	**1,706**	**9,574**	**16.3**	**9.8**	**-6.6**
Wymondham stores								
Co-Op, Market Place, Wymondham	Town Centre	300	100%	300	10,824	3.2	4.9	1.6
Waitrose, Norwich Road, Wymondham	Out-of-Centre [Rural South Norfolk]	2,400	80%	1,920	12,940	24.8	18.0	-6.8
Morrisons, Postmill Close, Wymondham	Out-of-Centre [Rural South Norfolk]	2,202	70%	1,541	12,656	19.5	35.1	15.6
Sub-total, Wymodham stores		**4,902**	-	**3,761**	**12,655**	**47.6**	**58.0**	**10.4**
Other stores								
Co-Op, Church Plain, Loddon	Town Centre	96	100%	96	10,824	1.0	8.3	7.3
Co-Op, The Street, Long Stratton	Town Centre	800	95%	760	10,824	8.2	11.6	3.4
Budgens, The Street, Poringland	Out of centre [Rural South Norfolk]	525	100%	525	7,804	4.1	5.8	1.7
Sub-total, other stores		**1,421**	-	**1,381**	**9,676**	**13.4**	**25.7**	**12.3**
Broadland area stores								
Norwich urban area stores								
Sainsbury's, Pound Lane, Dussindale	District Centre	4,407	70%	3,085	11,691	36.1	31.5	-4.6
Morrisons, The Paddocks, Spixworth	District Centre	2,000	70%	1,400	12,656	17.7	15.0	-2.7
Tesco Extra, Blue Boar Lane, Sprowston	Out of centre	6,182	65%	4,018	13,797	55.4	59.4	3.9
Tesco, Fakenham Road, Drayton	Out of centre	1,750	75%	1,313	13,797	18.1	17.7	-0.4
Sub-total, Norwich urban area		**14,339**	-	**9,816**	-	**127.3**	**123.6**	**-3.7**
Rural Broadland								
Co-Op, Acle	In-centre	300	100%	300	10,824	3.2	7.8	4.5
Budgens, Acle	Out of centre	556	100%	556	7,804	4.3	6.6	2.3
Budgens, Norwich Road, Aylsham	In-centre	637	100%	637	7,804	5.0	2.8	-2.2
Co-Op, Market Place, Aylsham	In-centre	157	100%	157	10,824	1.7	2.2	0.5
Tesco, Aylsham	Out of centre	2,300	80%	1,840	13,797	25.4	21.4	-4.0
Co-Op, Horsford	Out of centre	200	100%	200	10,824	2.2	5.5	3.3
Sub-total, Rural Broadland		**4,150**		**3,690**		**41.8**	**46.2**	**4.4**
(Total for Norwich urban area main stores)		***55,007***	-	***41,729***	**10,534**	***439.6***	***503.3***	***63.7***

Convenience Need Assessment

Sales eff 0.30%

Table 6: Convenience goods planning commitments

Proposed development	LPA	LPA planning application reference	Gross Floorspace (sq.m)	Net floorspace (sq.m)	Convenience goods net floorspace (sq.m)	Assumed sales density (£/sqm net)	Average Turnover 2020 (£m)	Average Turnover 2025 (£m)	Average Turnover 2030 (£m)	Average Turnover 2035 (£m)	Average Turnover 2038 (£m)
Norwich urban area commitments											
Aldi, Drayton Road, Norwich (former Wickes)	Norwich City	14/01841/F	1,620	1,296	1,037	10,827	11.2	10.8	10.8	10.8	10.8
Aldi, Hall Road, Norwich	Norwich City	15/01314/F	-	1,254	1,003	10,827	10.9	10.4	10.4	10.4	10.4
Lidl, Aylsham Road, Norwich (net additional floorspace following closure of Copenhagen Way store - sales area 846 sq.m)	Norwich City	16/00606/F	-	844	675	10,103	6.8	6.6	6.6	6.6	6.6
Sub-total for Norwich City	**-**	**-**	**-**		**2,715**	-	**28.9**	27.8	27.8	27.8	27.8
Taverham, Fir Covert Road supermarket	Broadland	20131175	-	-	994	10,103	10.0	9.6	9.6	9.6	9.6
Broadland Gate	Broadland	20081773	1900	1300	1,040	10,103	10.5	10.1	10.1	10.1	10.1
Lidl, Blue Boar Lane, Sprowston	Broadland	20161382		1689	1,351	10,103	13.7	13.1	13.1	13.1	13.1
Co-op, Chartwell Road	Broadland	20151802	278	208.5	198	10,824	2.1	2.1	2.1	2.1	2.1
Co-op, Station Road, Reepham	Broadland	20180963	420	315	299	10,824	3.2	3.1	3.1	3.1	3.1
North Sprowston and Old Catton urban extension	Broadland	20121516	2480	1,736	1,736	10,000	17.4	16.7	16.7	16.7	16.7
Sub-total for Broadland	-	-	-		5,618	-	**56.9**	**54.7**	**54.7**	**54.7**	**54.7**
Overall total for Norwich urban area	-	-	-		**8,333**		**85.8**	**82.5**	**82.5**	**82.5**	**82.5**
South Norfolk Rural											
Lidl, Farrier Close, Wymondham	South Norfolk	2016/2599		1,434	1,145	10,103	11.6	11.1	11.1	11.1	11.1
Sub-total for South Norfolk Rural	-	-	-	-	**1,145**	-	**11.6**	**11.1**	**11.1**	**11.1**	**11.1**

Assumes changes in sales efficiency in line with forecasts in Experian's Retail Planner Briefing Note 18 (October 2020).
Source: planning application data

Convenience Need Assessment

Table 8: Summary of quantiative convenience goods need for Norwich urban area

	2020	2025	2030	*2035**	*2038**
Residents Spending in Norwich main stores (£m)	523.6	511.1	519.5	*533.8*	*538.9*
Benchmark turnover (£m)	439.6	422.3	422.3	422.3	422.3
Sales from committed floorspace (£m)	85.8	82.5	82.5	82.5	82.5
Residual spending to support new convenience goods floorspace (£m)	84.0	6.4	14.8	*29.1*	*34.2*
Sales per sq.m net in new shops (£)	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**556**	**1,280**	***2,525***	***2,968***
Capacity for new floorspace (sq.m net, rounded)	**0**	**600**	**1,300**	***2,500***	***3,000***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note 1 — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.
Note 2 — This is capacity for Norwich urban area, including those parts of Norwich which fall within Broadland & South Norfolk authority areas

Convenience Need Assessment

Table 9a: Summary of quantiative convenience goods need for Diss

	2020	2025	2030	*2035**	*2038**
Residents Spending in Diss main stores (£m)	99.8	97.9	99.6	*102.6*	*102.8*
Benchmark turnover (£m)	74.4	71.5	71.5	71.5	71.5
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	25.4	26.4	28.0	*31.0*	*31.3*
Sales per sq.m net in new shops (£)	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**2,113**	**2,287**	**2,433**	***2,693***	***2,718***
Capacity for new floorspace (sq.m net, rounded)	**2,100**	**2,300**	**2,400**	***2,700***	***2,700***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Convenience Need Assessment

Table 9b: Summary of quantiative convenience goods need for Harleston

	2020	2025	2030	*2035**	*2038**
Residents Spending in Harleston main stores (£m)	9.8	9.7	9.8	*10.2*	*10.2*
Benchmark turnover (£m)	16.3	15.7	15.7	15.7	15.7
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	-6.6	-6.0	-5.9	*-5.5*	*-5.5*
Sales per sq.m net in new shops (£)	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**-523**	**-509**	***-480***	***-480***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-500**	**-500**	***-500***	***-500***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Convenience Need Assessment

Table 9c: Summary of quantiative convenience goods need for Wymondham

	2020	2025	2030	*2035**	*2038**
Residents Spending in Wymondham main stores (£m)	58.0	57.5	59.1	*61.4*	*61.9*
Benchmark turnover (£m)	47.6	45.7	45.7	45.7	45.7
Sales from committed floorspace (£m)	11.6	11.1	11.1	11.1	11.1
Residual spending to support new convenience goods floorspace (£m)	10.4	0.7	2.2	*4.5*	*5.1*
Sales per sq.m net in new shops (£) *Based on large store format*	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**62**	**192**	***394***	***443***
Capacity for new floorspace (sq.m net, rounded)	**0**	**100**	**200**	***400***	***400***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Table 9d: Summary of quantiative convenience goods need for rural South Norfolk

	2020	2025	2030	*2035**	*2038**
Residents Spending in main stores (£m)	25.7	25.5	26.1	*27.1*	*27.3*
Benchmark turnover (£m)	13.4	12.8	12.8	12.8	12.8
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	12.3	12.7	13.3	*14.2*	*14.4*
Sales per sq.m net in new shops (£)	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**1,098**	**1,150**	***1,236***	***1,250***
Capacity for new floorspace (sq.m net, rounded)	**0**	**1,100**	**1,100**	***1,200***	***1,300***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Table 9e: Summary of quantiative convenience goods need for South Norfolk

	2020	2025	2030	*2035**	*2038**
Residents Spending in main stores (£m)	193.3	190.6	194.5	*201.2*	*202.2*
Capacity for new floorspace (sq.m net)	**2113**	**2924**	**3265**	**3843**	**3932**
Capacity for new floorspace (sq.m net, rounded)	**2,100**	**2,900**	**3,300**	***3,800***	***3,900***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note 1 — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.
Note 2 — figures above are sum of Tables 9a to 9d inclusive.

Convenience Need Assessment

Table 10a: Summary of quantiative convenience goods need for Aylsham

	2020	2025	2030	*2035**	*2038**
Residents Spending in main stores (£m)	26.3	25.6	25.8	*26.4*	*26.5*
Benchmark turnover (£m)	32.1	30.8	30.8	30.8	30.8
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	-5.8	-5.2	-5.0	*-4.4*	*-4.3*
Sales per sq.m net in new shops (£)	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**-453**	**-431**	***-379***	***-370***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-500**	**-400**	***-400***	***-400***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Convenience Need Assessment

Table 10b: Summary of quantiative convenience goods need for rural Broadland

	2020	2025	2030	*2035**	*2038**
Residents Spending in main stores (£m)	19.9	19.4	19.7	*20.2*	*20.4*
Benchmark turnover (£m)	9.8	9.4	9.4	9.4	9.4
Sales from committed floorspace (£m)	0.0	0.0	0.0	0.0	0.0
Residual spending to support new convenience goods floorspace (£m)	10.2	10.1	10.3	*10.9*	*11.0*
Sales per sq.m net in new shops (£) *Based on large store format*	12,000	11,527	11,527	11,527	11,527
Capacity for new floorspace (sq.m net)	**0**	**873**	**898**	***943***	***957***
Capacity for new floorspace (sq.m net, rounded)	**0**	**900**	**900**	***900***	***1,000***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.

Table 10c: Summary of quantiative convenience goods need for Broadland

	2020	2025	2030	*2035**	*2038**
Residents Spending in main stores (£m)	46.2	45.0	45.5	46.7	46.9
Capacity for new floorspace (sq.m net)	**0**	***420***	***467***	***564***	***587***
Capacity for new floorspace (sq.m net, rounded)	**0**	**400**	**500**	***600***	***600***

**indicative forecasts, should be subject to further review throughout Local Plan period.*
Note 1 — above capacity forecasts are for new foodstores only — excludes turnover of local/specialist convenience goods stores.
Note 2 — figures above are sum of Tables 10a to 10b.

Appendix III

Updated Comparison Goods Quantitative Expenditure Capacity Assessment

Greater Norwich Town Centres and Retail Study Update 2020
Comparison Need Assessment

	Greater Norwich zones

Table 1
Survey Area Population Forecasts

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15	Total
2020	85,033	62,074	44,420	50,075	41,666	49,377	42,653	21,315	63,055	116,946	122,384	8,695	53,095	67,186	63,736	**891,710**
2025	88,177	63,671	45,503	51,599	43,670	52,048	44,388	21,969	64,759	120,166	124,467	9,150	55,038	69,698	65,986	**920,289**
2030	91,268	65,425	46,509	52,955	45,187	54,316	46,123	22,498	66,422	123,192	126,455	9,439	56,762	71,991	67,934	**946,476**
2035	94,386	67,101	47,554	54,395	46,948	56,786	47,858	23,090	68,106	126,315	128,491	9,811	58,596	74,394	70,033	**973,859**
2038	95,493	68,049	47,993	54,816	47,205	57,352	48,450	23,175	68,799	127,577	129,542	9,818	58,815	75,367	70,513	**982,964**
Change 2020-2038	**10,460**	**5,975**	**3,573**	**4,741**	**5,539**	**7,975**	**5,797**	**1,860**	**5,744**	**10,631**	**7,158**	**1,123**	**5,720**	**8,181**	**6,777**	***91,254***

Source: Experian (October 2020)

Greater Norwich zones

Table 2

Survey Area Retail Expenditure Forecasts Per Capita (2014 prices) - Comparison Goods

	Zone 1	Zone 2	Zone 3	Zone 4	Zone 5	Zone 6	Zone 7	Zone 8	Zone 9	Zone 10	Zone 11	Zone 12	Zone 13	Zone 14	Zone 15
2020	2,964	2,871	3,229	3,629	3,617	3,520	3,619	3,397	3,328	2,891	3,132	3,203	3,369	2,903	3,252
2020 Minus SFT at 22.9%	**2,285**	**2,214**	**2,489**	**2,798**	**2,789**	**2,714**	**2,790**	**2,619**	**2,566**	**2,229**	**2,415**	**2,469**	**2,597**	**2,238**	**2,507**
2025	3,519	3,409	3,834	4,308	4,295	4,179	4,297	4,034	3,952	3,433	3,719	3,803	4,000	3,447	3,861
2025 Minus SFT at 24.6%	**2,653**	**2,571**	**2,891**	**3,249**	**3,239**	**3,151**	**3,240**	**3,041**	**2,980**	**2,588**	**2,804**	**2,867**	**3,016**	**2,599**	**2,911**
2030	3,935	3,812	4,287	4,818	4,803	4,673	4,805	4,510	4,419	3,839	4,158	4,253	4,473	3,855	4,318
2030 Minus SFT at 26.9%	**2,876**	**2,787**	**3,134**	**3,522**	**3,511**	**3,416**	**3,513**	**3,297**	**3,230**	**2,806**	**3,040**	**3,109**	**3,270**	**2,818**	**3,156**
2035	4,469	4,330	4,869	5,472	5,455	5,308	5,458	5,123	5,019	4,360	4,723	4,830	5,080	4,378	4,904
2035 Minus SFT at 28.1%	**3,213**	**3,113**	**3,501**	**3,934**	**3,922**	**3,816**	**3,924**	**3,684**	**3,609**	**3,135**	**3,396**	**3,473**	**3,653**	**3,148**	**3,526**
2038	4,846	4,695	5,279	5,933	5,915	5,755	5,918	5,555	5,442	4,727	5,121	5,237	5,508	4,747	5,318
2038 Minus SFT at 28.5%	**3,465**	**3,357**	**3,775**	**4,242**	**4,229**	**4,115**	**4,231**	**3,972**	**3,891**	**3,380**	**3,662**	**3,745**	**3,938**	**3,394**	**3,802**

Source: Experian October 2020. Growth rates and allowance for SFT are dervied from Experian Retail Planner 18 (October 2020)

Table 3

Survey Area Retail Expenditure Forecasts (2014 prices)

	Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)
2020	194.3	137.4	110.6	140.1	116.2	134.0	119.0	55.8	161.8	260.7	295.5	21.5	137.9	150.4	159.8	**2,195.0**
2025	234.0	163.7	131.5	167.6	141.4	164.0	143.8	66.8	193.0	311.0	349.0	26.2	166.0	181.2	192.1	**2,631.3**
2030	262.5	182.3	145.7	186.5	158.6	185.6	162.0	74.2	214.6	345.7	384.4	29.3	185.6	202.9	214.4	**2,934.3**
2035	303.3	208.9	166.5	214.0	184.1	216.7	187.8	85.1	245.8	396.0	436.4	34.1	214.0	234.2	247.0	**3,373.8**
2038	330.9	228.4	181.2	232.5	199.6	236.0	205.0	92.0	267.7	431.2	474.4	36.8	231.6	255.8	268.1	**3,671.3**
Change 2020-38	**136.6**	**91.0**	**70.6**	**92.5**	**83.4**	**102.0**	**86.0**	**36.2**	**105.9**	**170.5**	**178.8**	**15.3**	**93.7**	**105.4**	**108.3**	**1,476.3**

Source: Tables 1 & 2

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Greater Norwich zones

Table 4
Comparison Goods Allocation - % Market Share

Zone Centre/Store	Policy Allocation	Zone 1 (%)	Zone 2 (%)	Zone 3 (%)	Zone 4 (%)	Zone 5 (%)	Zone 6 (%)	Zone 7 (%)	Zone 8 (%)	Zone 9 (%)	Zone 10 (%)	Zone 11 (%)	Zone 12 (%)	Zone 13 (%)	Zone 14 (%)	Zone 15 (%)
Norwich City Council Market Share %																
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	76.2%	74.1%	63.7%	42.8%	64.6%	56.6%	66.8%	56.0%	45.1%	25.4%	19.8%	34.7%	32.8%	34.2%	38.8%
Cathedral Retail Park	Town Centre	0.4%	0.3%	0.3%	0.0%	0.2%	0.0%	0.0%	3.6%	0.0%	0.4%	0.0%	0.0%	0.0%	0.1%	0.0%
Anglia Square District Centre	District Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Riverside District Centre	District Centre	2.4%	5.6%	5.6%	2.2%	2.6%	0.3%	1.2%	0.5%	0.1%	0.1%	0.1%	0.6%	0.4%	1.4%	0.5%
Hall Road Retail Park	Out-of-Centre	4.4%	3.0%	2.1%	1.6%	3.1%	3.8%	1.4%	0.9%	0.3%	0.0%	0.3%	2.0%	0.7%	0.2%	0.0%
Sweetbriar Retail Park	Out-of-Centre	3.3%	4.1%	5.3%	4.1%	1.0%	2.4%	4.0%	4.5%	2.0%	1.2%	0.4%	0.8%	0.0%	0.7%	0.6%
Asda, Hall Road	District Centre	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Asda, Hellesdon	Out-of-Centre	0.0%	0.3%	0.4%	0.0%	0.0%	0.0%	0.9%	0.0%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-total, Norwich City Council		**86.6%**	**87.6%**	**77.3%**	**50.8%**	**71.6%**	**63.1%**	**74.3%**	**65.5%**	**48.2%**	**27.1%**	**20.5%**	**38.1%**	**33.8%**	**36.7%**	**39.9%**
Broadland District Council Market Share %																
Aylsham Town Centre	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	13.4%	0.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Acle	Town Centre	0.0%	0.0%	0.0%	5.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.5%	0.0%	0.0%
Reepham	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%	2.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%
Sprowston Retail Park	Out-of-Centre	1.1%	4.9%	6.0%	6.6%	0.8%	0.4%	4.5%	1.5%	0.4%	1.3%	0.4%	0.8%	0.0%	0.2%	0.4%
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0%	0.8%	1.6%	2.2%	0.0%	0.8%	1.0%	0.0%	1.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
B&Q, Boundary Road	Out-of-Centre	2.7%	2.7%	3.5%	0.8%	0.9%	1.6%	4.3%	3.1%	1.8%	0.0%	0.1%	0.5%	0.9%	0.6%	0.2%
Sub-Total, Broadland District Council		**3.8%**	**8.3%**	**11.2%**	**15.2%**	**1.8%**	**2.8%**	**11.3%**	**20.5%**	**3.8%**	**1.4%**	**0.5%**	**1.3%**	**1.4%**	**0.8%**	**0.8%**
South Norfolk District Council Market Share %																
Diss	Town Centre	0.0%	0.0%	0.0%	0.0%	0.2%	1.9%	0.0%	0.0%	0.0%	0.0%	0.0%	11.1%	38.4%	0.2%	0.0%
Harleston	Town Centre	0.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.4%	35.9%	1.5%	0.0%	0.0%
Wymondham	Town Centre	0.4%	0.0%	0.0%	0.0%	0.0%	17.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.7%	0.0%
Loddon	Town Centre	0.0%	0.0%	0.0%	0.0%	2.5%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Long Stratton	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	3.1%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%
Longwater Retail Park, Costessey	Out-of-Centre	2.8%	0.0%	3.3%	0.2%	0.8%	7.0%	4.7%	2.1%	0.4%	0.0%	0.0%	0.3%	0.0%	0.3%	1.1%
Next Home & Garden, Costessey	Out-of-Centre	0.2%	0.0%	0.1%	0.0%	0.0%	0.0%	0.1%	0.1%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.1%	0.2%	0.1%	0.2%	0.3%	0.3%	0.0%	0.0%	0.0%	0.0%	0.0%	0.3%	0.1%	0.4%	0.0%
Sub-Total South Norfolk District Council		**3.5%**	**0.2%**	**3.5%**	**0.3%**	**3.9%**	**29.5%**	**4.9%**	**2.2%**	**1.4%**	**0.1%**	**0.5%**	**47.7%**	**40.0%**	**1.5%**	**1.3%**
TOTAL GREATER NORWICH Market Share %		**93.9%**	**96.2%**	**92.0%**	**66.3%**	**77.2%**	**95.4%**	**90.6%**	**88.3%**	**53.4%**	**28.6%**	**21.5%**	**87.1%**	**75.2%**	**39.0%**	**42.0%**
Competing Destinations Market Share %																
Lowestoft	Town Centre	0.0%	0.1%	0.0%	0.0%	0.4%	0.2%	0.0%	0.0%	0.0%	4.5%	39.2%	1.2%	0.0%	0.0%	0.0%
Great Yarmouth	Town Centre	0.1%	0.8%	0.3%	21.0%	1.7%	0.2%	0.1%	0.0%	1.0%	33.3%	0.5%	0.5%	0.0%	0.0%	0.0%
Dereham	Town Centre	0.2%	0.1%	0.2%	0.0%	0.0%	0.8%	1.0%	2.9%	0.1%	0.0%	0.0%	0.0%	0.0%	7.8%	28.3%
Beccles	Town Centre	0.0%	0.0%	0.0%	0.0%	10.6%	0.2%	0.0%	0.0%	0.0%	0.2%	15.7%	2.6%	1.4%	0.0%	0.0%
Thetford	Town Centre	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	2.8%	22.8%	0.0%
Fakenham	Town Centre	0.0%	0.0%	0.2%	0.0%	0.1%	0.0%	0.4%	0.4%	4.4%	0.1%	0.0%	1.0%	0.0%	0.6%	16.4%
Bury St Edmunds	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	11.8%	7.7%	0.0%
Attleborough	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	1.1%	10.5%	0.0%
North Walsham	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	1.1%	11.6%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Holt	Town Centre	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.4%	8.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.3%
Cromer	Town Centre	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	1.3%	9.0%	0.0%	0.3%	0.0%	0.0%	0.0%	0.0%
Kings Lynn	Town Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.1%	2.4%	0.0%	0.0%	0.0%	0.0%	0.9%	5.0%
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0%	0.0%	0.0%	1.7%	0.0%	0.0%	0.0%	0.0%	0.3%	10.6%	0.0%	0.1%	0.0%	0.0%	0.0%
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0%	0.0%	0.0%	0.2%	0.5%	0.0%	0.0%	0.0%	0.0%	0.7%	9.9%	0.5%	0.0%	0.1%	0.0%
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	0.6%	0.0%	0.0%	1.0%	0.0%	0.0%	0.0%	0.0%	0.0%	5.7%	0.0%	0.0%	0.0%	0.0%	0.0%
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0%	0.0%	0.0%	1.2%	0.4%	0.0%	0.0%	0.0%	0.0%	3.7%	1.0%	0.2%	0.0%	0.0%	0.0%
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.2%	0.8%	0.0%	0.0%	0.0%	0.0%	0.0%	1.8%
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	3.1%	0.0%
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.2%	0.0%	0.0%	0.0%	0.0%	0.0%	1.4%	0.1%	0.0%	0.0%	0.0%
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.1%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.5%	1.8%
Homebase, Holt Road, Cromer	Out-of-Centre	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%	0.4%	1.7%	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
Sub-Total Competing Destinations		**0.9%**	**1.0%**	**0.7%**	**25.0%**	**14.2%**	**2.7%**	**1.7%**	**6.8%**	**40.0%**	**58.8%**	**67.9%**	**6.2%**	**17.6%**	**54.0%**	**54.6%**
TOTAL Greater Norwich and Competing Destinations		**94.8%**	**97.2%**	**92.7%**	**91.3%**	**91.4%**	**98.1%**	**92.3%**	**95.1%**	**93.3%**	**87.4%**	**89.4%**	**93.3%**	**92.8%**	**93.0%**	**96.6%**
Other Destinations		**5.2%**	**2.8%**	**7.3%**	**8.7%**	**8.6%**	**1.9%**	**7.7%**	**4.9%**	**6.7%**	**12.6%**	**10.6%**	**6.7%**	**7.2%**	**7.0%**	**3.4%**

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Greater Norwich zones

Table 5a
Comparison Goods Allocation 2020 - Spend (£) 2014 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2020		**194.3**	**137.4**	**110.6**	**140.1**	**116.2**	**134.0**	**119.0**	**55.8**	**161.8**	**260.7**	**295.5**	**21.5**	**137.9**	**150.4**	**159.8**	**2195.0**	**100.0**
Norwich City Council Trade Draw Zone 1-15 (£m)																		
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	148.0	101.9	70.4	59.9	75.1	75.8	79.5	31.3	73.0	66.3	58.5	7.5	45.2	51.5	62.1	**1,005.9**	**45.8**
Cathedral Retail Park	Town Centre	0.7	0.4	0.4	0.0	0.2	0.0	0.0	2.0	0.0	1.1	0.0	0.0	0.0	0.2	0.0	**5.1**	**0.2**
Anglia Square District Centre	District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Riverside District Centre	District Centre	4.6	7.6	6.2	3.1	3.0	0.4	1.4	0.3	0.1	0.3	0.2	0.1	0.5	2.1	0.8	**30.9**	**1.4**
Hall Road Retail Park	Out-of-Centre	8.5	4.2	2.3	2.3	3.6	5.0	1.7	0.5	0.4	0.0	0.7	0.4	0.9	0.3	0.0	**30.9**	**1.4**
Sweetbriar Retail Park	Out-of-Centre	6.3	5.7	5.8	5.8	1.2	3.2	4.8	2.5	3.2	3.1	1.3	0.2	0.0	1.1	1.0	**45.1**	**2.1**
Asda, Hall Road	District Centre	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Asda, Hellesdon	Out-of-Centre	0.0	0.4	0.4	0.0	0.0	0.0	1.1	0.0	1.2	0.0	0.0	0.0	0.0	0.0	0.0	**3.1**	**0.1**
Sub-total, Norwich City Council		**168.2**	**120.4**	**85.5**	**71.1**	**83.1**	**84.5**	**88.5**	**36.6**	**78.0**	**70.7**	**60.7**	**8.2**	**46.6**	**55.2**	**63.8**	**1,121.2**	**51.1**
Broadland District Council Trade Draw Zone 1-15 (£m)																		
Aylsham Town Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.2	7.5	0.8	0.0	0.0	0.0	0.0	0.0	0.0	**8.5**	**0.4**
Acle	Town Centre	0.0	0.0	0.0	7.7	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.7	0.0	0.0	**8.7**	**0.4**
Reepham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.6	1.4	0.0	0.0	0.0	0.0	0.0	0.0	0.4	**3.4**	**0.2**
Sprowston Retail Park	Out-of-Centre	2.1	6.7	6.7	9.3	1.0	0.5	5.4	0.8	0.6	3.3	1.1	0.2	0.0	0.3	0.6	**38.7**	**1.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0	1.0	1.7	3.1	0.0	1.1	1.2	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	**10.0**	**0.5**
B&Q, Boundary Road	Out-of-Centre	5.2	3.7	3.9	1.1	1.1	2.2	5.1	1.7	2.8	0.1	0.4	0.1	1.2	0.8	0.3	**29.8**	**1.4**
Sub-Total, Broadland District Council		**7.3**	**11.5**	**12.3**	**21.2**	**2.0**	**3.7**	**13.5**	**11.5**	**6.1**	**3.7**	**1.5**	**0.3**	**1.9**	**1.1**	**1.3**	**99.0**	**4.5**
South Norfolk District Council Trade Draw Zone 1-15 (£m)																		
Diss	Town Centre	0.0	0.0	0.0	0.0	0.2	2.5	0.0	0.0	0.0	0.0	0.0	2.4	53.0	0.3	0.0	**58.4**	**2.7**
Harleston	Town Centre	0.1	0.0	0.1	0.0	0.0	0.0	0.2	0.0	0.2	0.0	1.3	7.7	2.1	0.0	0.0	**11.7**	**0.5**
Wymondham	Town Centre	0.7	0.0	0.0	0.0	0.0	23.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	0.0	**24.7**	**1.1**
Loddon	Town Centre	0.0	0.0	0.0	0.0	2.9	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.1**
Long Stratton	Town Centre	0.0	0.0	0.0	0.0	0.1	4.2	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.2**
Longwater Retail Park, Costessey	Out-of-Centre	5.5	0.0	3.6	0.2	1.0	9.4	5.5	1.2	0.7	0.0	0.0	0.1	0.0	0.4	1.8	**29.4**	**1.3**
Next Home & Garden, Costessey	Out-of-Centre	0.3	0.0	0.2	0.0	0.0	0.0	0.1	0.1	1.3	0.0	0.0	0.0	0.0	0.0	0.2	**2.1**	**0.1**
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.3	0.3	0.1	0.2	0.3	0.5	0.0	0.0	0.0	0.0	0.1	0.1	0.1	0.6	0.1	**2.6**	**0.1**
Sub-Total South Norfolk District Council		**6.9**	**0.3**	**3.9**	**0.5**	**4.5**	**39.5**	**5.8**	**1.2**	**2.2**	**0.2**	**1.4**	**10.2**	**55.2**	**2.3**	**2.0**	**136.2**	**6.2**
TOTAL GREATER NORWICH Trade Draw Zone 1-15 (£m)		**182.4**	**132.2**	**101.7**	**92.8**	**89.7**	**127.8**	**107.8**	**49.3**	**86.4**	**74.6**	**63.6**	**18.7**	**103.7**	**58.6**	**67.2**	**1356.4**	**61.8**
Competing Destinations Trade Draw Zone 1-15 (£m)																		
Lowestoft	Town Centre	0.0	0.1	0.0	0.0	0.5	0.3	0.0	0.0	0.0	11.6	115.9	0.3	0.0	0.0	0.0	**128.7**	**5.9**
Great Yarmouth	Town Centre	0.1	1.1	0.3	29.4	2.0	0.2	0.1	0.0	1.7	86.7	1.4	0.1	0.0	0.0	0.0	**123.2**	**5.6**
Dereham	Town Centre	0.4	0.1	0.2	0.0	0.0	1.0	1.2	1.6	0.1	0.0	0.0	0.0	0.0	11.8	45.2	**61.6**	**2.8**
Beccles	Town Centre	0.0	0.0	0.0	0.0	12.3	0.3	0.0	0.0	0.0	0.4	46.3	0.6	1.9	0.0	0.0	**61.9**	**2.8**
Thetford	Town Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	3.9	34.2	0.0	**38.4**	**1.7**
Fakenham	Town Centre	0.0	0.0	0.2	0.0	0.2	0.0	0.5	0.2	7.1	0.3	0.0	0.2	0.0	0.9	26.2	**35.7**	**1.6**
Bury St Edmunds	Town Centre	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	16.3	11.6	0.0	**28.1**	**1.3**
Attleborough	Town Centre	0.1	0.0	0.0	0.0	0.0	1.5	0.0	0.1	0.0	0.0	0.0	0.0	1.5	15.8	0.0	**18.9**	**0.9**
North Walsham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	18.7	0.1	0.0	0.0	0.0	0.0	0.0	**19.4**	**0.9**
Holt	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.2	14.3	0.0	0.0	0.0	0.0	0.0	2.1	**16.7**	**0.8**
Cromer	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.7	14.5	0.0	0.8	0.0	0.0	0.0	0.1	**16.1**	**0.7**
Kings Lynn	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	3.9	0.0	0.0	0.0	0.0	1.4	8.0	**13.4**	**0.6**
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.3	0.0	0.0	0.0	0.0	0.4	27.6	0.0	0.0	0.0	0.0	0.0	**30.4**	**1.4**
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.3	0.6	0.0	0.0	0.0	0.0	1.9	29.3	0.1	0.0	0.2	0.0	**32.4**	**1.5**
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	1.1	0.0	0.0	1.3	0.0	0.0	0.0	0.0	0.0	14.8	0.0	0.0	0.0	0.0	0.0	**17.2**	**0.8**
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	1.7	0.5	0.0	0.0	0.0	0.0	9.6	3.0	0.0	0.0	0.0	0.0	**14.7**	**0.7**
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.3	0.1	0.0	0.0	0.0	0.0	2.8	**4.3**	**0.2**
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.6	4.6	0.0	**5.2**	**0.2**
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.1	4.0	0.0	0.0	0.0	0.0	**4.4**	**0.2**
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.7	2.9	**3.7**	**0.2**
Homebase, Holt Road, Cromer	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	2.7	0.0	0.0	0.0	0.0	0.0	0.0	**2.9**	**0.1**
Sub-Total Competing Destinations		**1.7**	**1.3**	**0.8**	**35.0**	**16.5**	**3.6**	**2.0**	**3.8**	**64.7**	**153.2**	**200.6**	**1.3**	**24.2**	**81.2**	**87.2**	**677.2**	**30.9**
TOTAL Greater Norwich and Competing Destinations Trade Draw Zone 1-15 (£m)		**184.1**	**133.5**	**102.5**	**127.8**	**106.2**	**131.4**	**109.8**	**53.1**	**151.0**	**227.9**	**264.2**	**20.0**	**127.9**	**139.8**	**154.4**	**2033.7**	**92.7**
Other Destinations		**10.2**	**3.9**	**8.1**	**12.2**	**10.0**	**2.6**	**9.2**	**2.8**	**10.8**	**32.8**	**31.3**	**1.4**	**10.0**	**10.6**	**5.4**	**161.3**	**7.3**

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Greater Norwich zones

Table 5b
Comparison Goods Allocation 2025 - Spend (£) 2014 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	Total (£m)	*Total (%)*
Total Available Spend - 2025		**234.0**	**163.7**	**131.5**	**167.6**	**141.4**	**164.0**	**143.8**	**66.8**	**193.0**	**311.0**	**349.0**	**26.2**	**166.0**	**181.2**	**192.1**	**2631.3**	**100.0**
Norwich City Council Trade Draw Zone 1-15 (£m)																		
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	178.2	121.3	83.7	71.7	91.4	92.8	96.0	37.4	87.1	79.1	69.1	9.1	54.4	62.0	74.6	**1,208.1**	**45.9**
Cathedral Retail Park	Town Centre	0.9	0.5	0.4	0.0	0.3	0.0	0.0	2.4	0.0	1.3	0.0	0.0	0.0	0.3	0.0	**6.1**	**0.2**
Anglia Square District Centre	District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Riverside District Centre	District Centre	5.5	9.1	7.3	3.8	3.7	0.5	1.7	0.4	0.1	0.4	0.2	0.2	0.6	2.5	0.9	**37.0**	**1.4**
Hall Road Retail Park	Out-of-Centre	10.3	5.0	2.7	2.7	4.3	6.2	2.0	0.6	0.5	0.0	0.9	0.5	1.1	0.4	0.0	**37.3**	**1.4**
Sweetbriar Retail Park	Out-of-Centre	7.6	6.8	7.0	6.9	1.5	4.0	5.8	3.0	3.8	3.6	1.5	0.2	0.0	1.3	1.2	**54.1**	**2.1**
Asda, Hall Road	District Centre	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.3**	**0.0**
Asda, Hellesdon	Out-of-Centre	0.0	0.4	0.5	0.0	0.0	0.0	1.3	0.0	1.5	0.0	0.0	0.0	0.0	0.0	0.0	**3.7**	**0.1**
Sub-total, Norwich City Council		**202.5**	**143.4**	**101.7**	**85.1**	**101.2**	**103.4**	**106.9**	**43.8**	**93.0**	**84.4**	**71.7**	**10.0**	**56.1**	**66.5**	**76.7**	**1,346.5**	**51.2**
Broadland District Council Trade Draw Zone 1-15 (£m)																		
Aylsham Town Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.3	8.9	1.0	0.0	0.0	0.0	0.0	0.0	0.0	**10.2**	**0.4**
Acle	Town Centre	0.0	0.0	0.0	9.2	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.8	0.0	0.0	**10.4**	**0.4**
Reepham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	1.9	1.7	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**4.1**	**0.2**
Sprowston Retail Park	Out-of-Centre	2.6	8.0	7.9	11.1	1.2	0.7	6.5	1.0	0.7	3.9	1.3	0.2	0.0	0.4	0.8	**46.3**	**1.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0	1.2	2.1	3.7	0.0	1.3	1.4	0.0	2.3	0.0	0.0	0.0	0.0	0.0	0.0	**11.9**	**0.5**
B&Q, Boundary Road	Out-of-Centre	6.2	4.4	4.7	1.4	1.3	2.6	6.2	2.1	3.4	0.1	0.4	0.1	1.5	1.0	0.4	**35.8**	**1.4**
Sub-Total, Broadland District Council		**8.8**	**13.6**	**14.7**	**25.4**	**2.5**	**4.6**	**16.3**	**13.7**	**7.3**	**4.4**	**1.7**	**0.3**	**2.3**	**1.4**	**1.6**	**118.7**	**4.5**
South Norfolk District Council Trade Draw Zone 1-15 (£m)																		
Diss	Town Centre	0.0	0.0	0.0	0.0	0.3	3.1	0.0	0.0	0.0	0.0	0.0	2.9	63.8	0.4	0.0	**70.4**	**2.7**
Harleston	Town Centre	0.2	0.0	0.1	0.0	0.0	0.0	0.3	0.0	0.2	0.0	1.5	9.4	2.5	0.0	0.0	**14.2**	**0.5**
Wymondham	Town Centre	0.9	0.0	0.0	0.0	0.1	28.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.2	0.0	**30.2**	**1.1**
Loddon	Town Centre	0.0	0.0	0.0	0.0	3.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.1**
Long Stratton	Town Centre	0.0	0.0	0.0	0.0	0.1	5.1	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**5.4**	**0.2**
Longwater Retail Park, Costessey	Out-of-Centre	6.6	0.0	4.3	0.3	1.2	11.5	6.7	1.4	0.8	0.0	0.0	0.1	0.0	0.5	2.1	**35.5**	**1.4**
Next Home & Garden, Costessey	Out-of-Centre	0.4	0.0	0.2	0.0	0.0	0.0	0.1	0.1	1.6	0.0	0.0	0.0	0.0	0.0	0.2	**2.5**	**0.1**
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.3	0.4	0.1	0.3	0.4	0.6	0.0	0.0	0.0	0.0	0.2	0.1	0.1	0.7	0.1	**3.1**	**0.1**
Sub-Total South Norfolk District Council		**8.3**	**0.4**	**4.6**	**0.6**	**5.5**	**48.4**	**7.1**	**1.5**	**2.7**	**0.2**	**1.7**	**12.5**	**66.4**	**2.7**	**2.4**	**164.9**	**6.3**
TOTAL GREATER NORWICH Trade Draw Zone 1-15 (£m)		**219.6**	**157.5**	**121.0**	**111.1**	**109.2**	**156.4**	**130.3**	**59.0**	**103.0**	**89.1**	**75.1**	**22.8**	**124.8**	**70.6**	**80.8**	**1630.1**	**61.9**
Competing Destinations Trade Draw Zone 1-15 (£m)																		
Lowestoft	Town Centre	0.0	0.1	0.0	0.0	0.6	0.4	0.0	0.0	0.0	13.9	136.8	0.3	0.0	0.0	0.0	**152.1**	**5.8**
Great Yarmouth	Town Centre	0.2	1.3	0.4	35.2	2.4	0.3	0.1	0.0	2.0	103.5	1.7	0.1	0.0	0.0	0.0	**147.1**	**5.6**
Dereham	Town Centre	0.5	0.1	0.2	0.0	0.0	1.2	1.5	1.9	0.1	0.0	0.0	0.0	0.0	14.2	54.3	**74.2**	**2.8**
Beccles	Town Centre	0.0	0.0	0.0	0.0	15.0	0.4	0.0	0.0	0.0	0.5	54.7	0.7	2.3	0.0	0.0	**73.6**	**2.8**
Thetford	Town Centre	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	4.7	41.2	0.0	**46.2**	**1.8**
Fakenham	Town Centre	0.0	0.0	0.2	0.0	0.2	0.0	0.6	0.2	8.4	0.3	0.0	0.3	0.0	1.0	31.5	**42.8**	**1.6**
Bury St Edmunds	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	19.6	14.0	0.0	**33.9**	**1.3**
Attleborough	Town Centre	0.1	0.0	0.0	0.0	0.0	1.9	0.0	0.1	0.0	0.0	0.0	0.0	1.8	19.0	0.0	**22.8**	**0.9**
North Walsham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	22.3	0.1	0.0	0.0	0.0	0.0	0.0	**23.1**	**0.9**
Holt	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.3	17.0	0.0	0.0	0.0	0.0	0.0	2.5	**19.9**	**0.8**
Cromer	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.9	17.3	0.0	0.9	0.0	0.0	0.0	0.1	**19.2**	**0.7**
Kings Lynn	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	4.6	0.0	0.0	0.0	0.0	1.7	9.6	**16.0**	**0.6**
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.8	0.1	0.0	0.0	0.0	0.5	33.0	0.0	0.0	0.0	0.0	0.0	**36.3**	**1.4**
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.3	0.7	0.0	0.0	0.0	0.0	2.2	34.6	0.1	0.0	0.3	0.0	**38.3**	**1.5**
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	1.3	0.0	0.0	1.6	0.0	0.0	0.0	0.0	0.0	17.7	0.0	0.0	0.0	0.0	0.0	**20.6**	**0.8**
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.0	0.6	0.0	0.0	0.0	0.0	11.4	3.5	0.1	0.0	0.0	0.0	**17.5**	**0.7**
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.5	0.1	0.0	0.0	0.0	0.0	3.4	**5.2**	**0.2**
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	5.6	0.0	**6.2**	**0.2**
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.1	4.7	0.0	0.0	0.0	0.0	**5.1**	**0.2**
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0	0.8	3.5	**4.4**	**0.2**
Homebase, Holt Road, Cromer	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	3.2	0.0	0.0	0.0	0.0	0.0	0.0	**3.5**	**0.1**
Sub-Total Competing Destinations		**2.1**	**1.6**	**0.9**	**41.9**	**20.0**	**4.4**	**2.5**	**4.5**	**77.1**	**182.8**	**236.9**	**1.6**	**29.2**	**97.8**	**104.8**	**808.2**	**30.7**
TOTAL Greater Norwich and Competing Destinations Trade Draw Zone 1-15 (£m)		**221.7**	**159.1**	**121.9**	**153.0**	**129.2**	**160.8**	**132.7**	**63.5**	**180.1**	**271.9**	**312.0**	**24.5**	**154.0**	**168.4**	**185.6**	**2438.4**	**92.7**
Other Destinations		**12.3**	**4.6**	**9.6**	**14.7**	**12.2**	**3.2**	**11.1**	**3.3**	**12.9**	**39.2**	**37.0**	**1.8**	**12.0**	**12.7**	**6.5**	**193.0**	**7.3**

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Table 5c

Comparison Goods Allocation 2030 - Spend (£) 2014 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2030		**262.5**	**182.3**	**145.7**	**186.5**	**158.6**	**185.6**	**162.0**	**74.2**	**214.6**	**345.7**	**384.4**	**29.3**	**185.6**	**202.9**	**214.4**	**2934.3**	**100.0**
Norwich City Council Trade Draw Zone 1-15 (£m)																		
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	200.0	135.1	92.8	79.8	102.6	105.0	108.2	41.6	96.9	87.9	76.1	10.2	60.9	69.4	83.3	**1,349.5**	**46.0**
Cathedral Retail Park	Town Centre	1.0	0.6	0.5	0.0	0.3	0.0	0.0	2.6	0.0	1.5	0.0	0.0	0.0	0.3	0.0	**6.7**	**0.2**
Anglia Square District Centre	District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Riverside District Centre	District Centre	6.2	10.1	8.1	4.2	4.2	0.6	1.9	0.4	0.1	0.4	0.3	0.2	0.7	2.9	1.0	**41.3**	**1.4**
Hall Road Retail Park	Out-of-Centre	11.6	5.5	3.0	3.1	4.9	7.0	2.3	0.7	0.6	0.0	1.0	0.6	1.2	0.4	0.0	**41.8**	**1.4**
Sweetbriar Retail Park	Out-of-Centre	8.5	7.6	7.7	7.7	1.6	4.5	6.6	3.3	4.2	4.1	1.7	0.2	0.0	1.4	1.3	**60.4**	**2.1**
Asda, Hall Road	District Centre	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0**
Asda, Hellesdon	Out-of-Centre	0.0	0.5	0.6	0.0	0.0	0.0	1.4	0.0	1.6	0.0	0.0	0.0	0.0	0.0	0.0	**4.1**	**0.1**
Sub-total, Norwich City Council		**227.3**	**159.8**	**112.7**	**94.7**	**113.5**	**117.0**	**120.4**	**48.6**	**103.4**	**93.8**	**79.0**	**11.2**	**62.8**	**74.4**	**85.6**	**1,504.2**	**51.3**
Broadland District Council Trade Draw Zone 1-15 (£m)																		
Aylsham Town Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.3	9.9	1.1	0.0	0.0	0.0	0.0	0.0	0.0	**11.3**	**0.4**
Acle	Town Centre	0.0	0.0	0.0	10.3	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	0.9	0.0	0.0	**11.6**	**0.4**
Reepham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.1	1.9	0.0	0.0	0.0	0.0	0.0	0.0	0.5	**4.6**	**0.2**
Sprowston Retail Park	Out-of-Centre	2.9	8.9	8.8	12.4	1.3	0.7	7.3	1.1	0.8	4.3	1.4	0.2	0.0	0.4	0.8	**51.6**	**1.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0	1.4	2.3	4.1	0.0	1.5	1.6	0.0	2.5	0.0	0.0	0.0	0.0	0.0	0.0	**13.3**	**0.5**
B&Q, Boundary Road	Out-of-Centre	7.0	4.9	5.2	1.5	1.4	3.0	7.0	2.3	3.8	0.1	0.5	0.1	1.6	1.1	0.4	**40.0**	**1.4**
Sub-Total, Broadland District Council		**9.9**	**15.2**	**16.3**	**28.3**	**2.8**	**5.2**	**18.4**	**15.2**	**8.1**	**4.9**	**1.9**	**0.4**	**2.5**	**1.6**	**1.8**	**132.4**	**4.5**
South Norfolk District Council Trade Draw Zone 1-15 (£m)																		
																		0.0
Diss	Town Centre	0.0	0.0	0.0	0.0	0.3	3.5	0.0	0.0	0.0	0.0	0.0	3.3	71.3	0.4	0.0	**78.8**	**2.7**
Harleston	Town Centre	0.2	0.0	0.1	0.0	0.0	0.0	0.3	0.0	0.3	0.0	1.6	10.5	2.8	0.0	0.0	**15.9**	**0.5**
Wymondham	Town Centre	1.0	0.0	0.0	0.0	0.1	31.8	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.3	0.0	**34.2**	**1.2**
Loddon	Town Centre	0.0	0.0	0.0	0.0	4.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.0**	**0.1**
Long Stratton	Town Centre	0.0	0.0	0.0	0.0	0.1	5.8	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	**6.1**	**0.2**
Longwater Retail Park, Costessey	Out-of-Centre	7.4	0.0	4.8	0.3	1.3	13.0	7.5	1.6	0.9	0.0	0.0	0.1	0.0	0.6	2.4	**39.9**	**1.4**
Next Home & Garden, Costessey	Out-of-Centre	0.4	0.0	0.2	0.0	0.0	0.0	0.1	0.1	1.7	0.0	0.0	0.0	0.0	0.0	0.2	**2.8**	**0.1**
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.3	0.4	0.1	0.3	0.5	0.6	0.0	0.0	0.0	0.0	0.2	0.1	0.1	0.8	0.1	**3.5**	**0.1**
Sub-Total South Norfolk District Council		**9.3**	**0.4**	**5.1**	**0.6**	**6.2**	**54.7**	**7.9**	**1.7**	**3.0**	**0.2**	**1.8**	**14.0**	**74.2**	**3.1**	**2.7**	**185.0**	**6.3**
TOTAL GREATER NORWICH Trade Draw Zone 1-15 (£m)		**246.5**	**175.4**	**134.0**	**123.6**	**122.5**	**177.0**	**146.7**	**65.5**	**114.5**	**99.0**	**82.7**	**25.5**	**139.5**	**79.1**	**90.1**	**1,821.6**	**62.1**
Competing Destinations Trade Draw Zone 1-15 (£m)																		
Lowestoft	Town Centre	0.0	0.1	0.0	0.0	0.7	0.4	0.0	0.0	0.0	15.4	150.7	0.4	0.0	0.0	0.0	**167.7**	**5.7**
Great Yarmouth	Town Centre	0.2	1.5	0.4	39.1	2.7	0.3	0.1	0.0	2.2	115.0	1.8	0.1	0.0	0.0	0.0	**163.5**	**5.6**
Dereham	Town Centre	0.6	0.1	0.2	0.0	0.0	1.4	1.7	2.2	0.1	0.0	0.0	0.0	0.0	15.9	60.6	**82.8**	**2.8**
Beccles	Town Centre	0.0	0.0	0.0	0.0	16.8	0.4	0.0	0.0	0.0	0.6	60.3	0.8	2.6	0.0	0.0	**81.5**	**2.8**
Thetford	Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	5.3	46.2	0.0	**51.7**	**1.8**
Fakenham	Town Centre	0.0	0.0	0.2	0.0	0.2	0.0	0.7	0.3	9.4	0.4	0.0	0.3	0.0	1.2	35.1	**47.8**	**1.6**
Bury St Edmunds	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	21.9	15.7	0.0	**37.9**	**1.3**
Attleborough	Town Centre	0.1	0.0	0.0	0.0	0.0	2.1	0.0	0.1	0.0	0.0	0.0	0.0	2.0	21.3	0.0	**25.6**	**0.9**
North Walsham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.8	24.8	0.1	0.0	0.0	0.0	0.0	0.0	**25.7**	**0.9**
Holt	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.3	18.9	0.0	0.0	0.0	0.0	0.0	2.8	**22.2**	**0.8**
Cromer	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.9	19.2	0.0	1.0	0.0	0.0	0.0	0.1	**21.3**	**0.7**
Kings Lynn	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	5.2	0.0	0.0	0.0	0.0	1.9	10.7	**17.9**	**0.6**
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	3.1	0.1	0.0	0.0	0.0	0.6	36.6	0.0	0.0	0.0	0.0	0.0	**40.4**	**1.4**
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.4	0.8	0.0	0.0	0.0	0.0	2.5	38.2	0.1	0.0	0.3	0.0	**42.3**	**1.4**
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	1.5	0.0	0.0	1.8	0.0	0.0	0.0	0.0	0.0	19.6	0.0	0.0	0.0	0.0	0.0	**22.9**	**0.8**
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.3	0.6	0.0	0.0	0.0	0.0	12.7	3.8	0.1	0.0	0.0	0.0	**19.5**	**0.7**
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	1.7	0.2	0.0	0.0	0.0	0.0	3.8	**5.8**	**0.2**
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.7	6.2	0.0	**7.0**	**0.2**
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.2	5.2	0.0	0.0	0.0	0.0	**5.7**	**0.2**
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	0.9	3.9	**5.0**	**0.2**
Homebase, Holt Road, Cromer	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	3.6	0.0	0.0	0.0	0.0	0.0	0.0	**3.8**	**0.1**
Sub-Total Competing Destinations		**2.3**	**1.8**	**1.0**	**46.6**	**22.5**	**5.0**	**2.8**	**5.0**	**85.7**	**203.2**	**261.0**	**1.8**	**32.6**	**109.6**	**117.0**	**897.9**	**30.6**
TOTAL Greater Norwich and Competing Destinations Trade Draw Zone 1-15 (£m)		**248.8**	**177.2**	**135.1**	**170.2**	**145.0**	**181.9**	**149.5**	**70.5**	**200.2**	**302.2**	**343.7**	**27.4**	**172.1**	**188.6**	**207.1**	**2,719.5**	**92.7**
Other Destinations		**13.8**	**5.1**	**10.7**	**16.3**	**13.7**	**3.6**	**12.5**	**3.7**	**14.3**	**43.5**	**40.7**	**2.0**	**13.5**	**14.2**	**7.3**	**214.8**	**7.3**

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Table 5d
Comparison Goods Allocation 2035 - Spend (£) 2014 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2035		**303.3**	**208.9**	**166.5**	**214.0**	**184.1**	**216.7**	**187.8**	**85.1**	**245.8**	**396.0**	**436.4**	**34.1**	**214.0**	**234.2**	**247.0**	**3,373.8**	**100.0**
Norwich City Council Trade Draw Zone 1-15 (£m)																		
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	231.1	154.9	106.0	91.5	119.0	122.6	125.4	47.7	111.0	100.7	86.3	11.8	70.2	80.1	95.9	**1,554.2**	**46.1**
Cathedral Retail Park	Town Centre	1.1	0.7	0.5	0.0	0.4	0.0	0.0	3.0	0.0	1.7	0.0	0.0	0.0	0.3	0.0	**7.7**	**0.2**
Anglia Square District Centre	District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Riverside District Centre	District Centre	7.2	11.6	9.3	4.8	4.8	0.7	2.3	0.5	0.1	0.5	0.3	0.2	0.8	3.3	1.2	**47.5**	**1.4**
Hall Road Retail Park	Out-of-Centre	13.3	6.3	3.5	3.5	5.6	8.1	2.7	0.8	0.7	0.0	1.1	0.7	1.4	0.5	0.0	**48.2**	**1.4**
Sweetbriar Retail Park	Out-of-Centre	9.9	8.7	8.8	8.8	1.9	5.2	7.6	3.8	4.8	4.6	1.9	0.3	0.0	1.6	1.5	**69.5**	**2.1**
Asda, Hall Road	District Centre	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0**
Asda, Hellesdon	Out-of-Centre	0.0	0.6	0.6	0.0	0.0	0.0	1.7	0.0	1.9	0.0	0.0	0.0	0.0	0.0	0.0	**4.7**	**0.1**
Sub-total, Norwich City Council		**262.6**	**183.1**	**128.7**	**108.7**	**131.8**	**136.7**	**139.6**	**55.7**	**118.5**	**107.5**	**89.6**	**13.0**	**72.4**	**85.9**	**98.6**	1,732.2	51.3
Broadland District Council Trade Draw Zone 1-15 (£m)																		
Aylsham Town Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.3	11.4	1.3	0.0	0.0	0.0	0.0	0.0	0.0	**13.0**	**0.4**
Acle	Town Centre	0.0	0.0	0.0	11.8	0.0	0.0	0.0	0.0	0.0	0.5	0.0	0.0	1.0	0.0	0.0	**13.3**	**0.4**
Reepham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.5	2.2	0.0	0.0	0.0	0.0	0.0	0.0	0.6	**5.3**	**0.2**
Sprowston Retail Park	Out-of-Centre	3.4	10.2	10.0	14.2	1.6	0.9	8.5	1.3	0.9	5.0	1.6	0.3	0.0	0.5	1.0	**59.2**	**1.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0	1.6	2.6	4.7	0.0	1.7	1.8	0.0	2.9	0.0	0.0	0.0	0.0	0.0	0.0	**15.3**	**0.5**
B&Q, Boundary Road	Out-of-Centre	8.1	5.6	5.9	1.8	1.7	3.5	8.1	2.7	4.3	0.1	0.5	0.2	1.9	1.3	0.5	**46.1**	**1.4**
Sub-Total, Broadland District Council		**11.5**	**17.4**	**18.6**	**32.4**	**3.2**	**6.1**	**21.3**	**17.5**	**9.3**	**5.6**	**2.2**	**0.4**	**2.9**	**1.8**	**2.1**	**152.2**	**4.5**
South Norfolk District Council Trade Draw Zone 1-15 (£m)																		
Diss	Town Centre	0.0	0.0	0.0	0.0	0.3	4.1	0.0	0.0	0.0	0.0	0.0	3.8	82.2	0.5	0.0	**90.9**	**2.7**
Harleston	Town Centre	0.2	0.0	0.1	0.0	0.0	0.0	0.3	0.0	0.3	0.0	1.9	12.2	3.3	0.0	0.0	**18.3**	**0.5**
Wymondham	Town Centre	1.1	0.0	0.0	0.0	0.1	37.2	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.5	0.0	**39.9**	**1.2**
Loddon	Town Centre	0.0	0.0	0.0	0.0	4.6	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**4.6**	**0.1**
Long Stratton	Town Centre	0.0	0.0	0.0	0.0	0.1	6.7	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**7.1**	**0.2**
Longwater Retail Park, Costessey	Out-of-Centre	8.5	0.0	5.5	0.4	1.5	15.2	8.7	1.8	1.1	0.0	0.0	0.1	0.0	0.7	2.7	**46.2**	**1.4**
Next Home & Garden, Costessey	Out-of-Centre	0.5	0.0	0.2	0.0	0.0	0.0	0.1	0.1	2.0	0.0	0.0	0.0	0.0	0.0	0.2	**3.2**	**0.1**
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.4	0.5	0.1	0.3	0.5	0.7	0.0	0.0	0.0	0.0	0.2	0.1	0.1	0.9	0.1	**4.0**	**0.1**
Sub-Total South Norfolk District Council		**10.7**	**0.5**	**5.9**	**0.7**	**7.2**	**63.9**	**9.2**	**1.9**	**3.4**	**0.3**	**2.1**	**16.2**	**85.6**	**3.6**	**3.1**	**214.3**	**6.4**
TOTAL GREATER NORWICH Trade Draw Zone 1-15 (£m)		**284.7**	**201.0**	**153.1**	**141.8**	**142.2**	**206.7**	**170.1**	**75.1**	**131.2**	**113.4**	**93.9**	**29.7**	**160.9**	**91.3**	**103.8**	**2,098.8**	**62.2**
Competing Destinations Trade Draw Zone 1-15 (£m)																		
Lowestoft	Town Centre	0.0	0.1	0.0	0.0	0.8	0.5	0.0	0.0	0.0	17.6	171.1	0.4	0.0	0.0	0.0	**190.6**	**5.6**
Great Yarmouth	Town Centre	0.2	1.7	0.5	44.9	3.1	0.4	0.1	0.0	2.6	131.7	2.1	0.2	0.0	0.0	0.0	**187.5**	**5.6**
Dereham	Town Centre	0.7	0.2	0.3	0.0	0.0	1.6	2.0	2.5	0.2	0.0	0.0	0.0	0.0	18.4	69.8	**95.5**	**2.8**
Beccles	Town Centre	0.0	0.0	0.0	0.0	19.5	0.5	0.0	0.0	0.0	0.7	68.4	0.9	3.0	0.0	0.0	**93.0**	**2.8**
Thetford	Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.1	53.3	0.0	**59.7**	**1.8**
Fakenham	Town Centre	0.0	0.0	0.3	0.0	0.2	0.0	0.8	0.3	10.8	0.4	0.0	0.3	0.0	1.4	40.5	**55.0**	**1.6**
Bury St Edmunds	Town Centre	0.0	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	25.3	18.1	0.0	**43.8**	**1.3**
Attleborough	Town Centre	0.1	0.0	0.0	0.0	0.0	2.5	0.0	0.1	0.0	0.0	0.0	0.0	2.3	24.6	0.0	**29.6**	**0.9**
North Walsham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	28.4	0.1	0.0	0.0	0.0	0.0	0.0	**29.5**	**0.9**
Holt	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.3	21.7	0.0	0.0	0.0	0.0	0.0	3.3	**25.4**	**0.8**
Cromer	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.1	22.0	0.0	1.1	0.0	0.0	0.0	0.1	**24.4**	**0.7**
Kings Lynn	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.0	5.9	0.0	0.0	0.0	0.0	2.2	12.3	**20.6**	**0.6**
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	3.5	0.1	0.0	0.0	0.0	0.6	42.0	0.0	0.0	0.0	0.0	0.0	**46.3**	**1.4**
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.4	0.9	0.0	0.0	0.0	0.0	2.9	43.3	0.2	0.0	0.3	0.0	**48.1**	**1.4**
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	1.7	0.0	0.0	2.0	0.0	0.0	0.0	0.0	0.0	22.5	0.0	0.0	0.0	0.0	0.0	**26.2**	**0.8**
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.6	0.7	0.0	0.0	0.0	0.0	14.5	4.4	0.1	0.0	0.0	0.0	**22.3**	**0.7**
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	2.0	0.2	0.0	0.0	0.0	0.0	4.3	**6.6**	**0.2**
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	7.2	0.0	**8.1**	**0.2**
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.2	5.9	0.0	0.0	0.0	0.0	**6.5**	**0.2**
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.1	4.4	**5.7**	**0.2**
Homebase, Holt Road, Cromer	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	4.1	0.0	0.0	0.0	0.0	0.0	0.0	**4.4**	**0.1**
Sub-Total Competing Destinations		**2.7**	**2.0**	**1.2**	**53.5**	**26.1**	**5.8**	**3.2**	**5.8**	**98.2**	**232.7**	**296.2**	**2.1**	**37.6**	**126.5**	**134.8**	**1,028.4**	**30.5**
TOTAL Greater Norwich and Competing Destinations Trade Draw Zone 1-15 (£m)		**287.4**	**203.0**	**154.3**	**195.3**	**168.3**	**212.5**	**173.3**	**80.9**	**229.4**	**346.1**	**390.1**	**31.8**	**198.5**	**217.8**	**238.6**	**3,127.2**	**92.7**
Other Destinations		**15.9**	**5.9**	**12.2**	**18.7**	**15.9**	**4.2**	**14.5**	**4.2**	**16.4**	**49.9**	**46.2**	**2.3**	**15.5**	**16.4**	**8.4**	**246.6**	**7.3**

Comparison Need Assessment

Table 5e

Comparison Goods Allocation 2038 - Spend (£) 2014 Prices

Zone Centre/Store		Zone 1 (£m)	Zone 2 (£m)	Zone 3 (£m)	Zone 4 (£m)	Zone 5 (£m)	Zone 6 (£m)	Zone 7 (£m)	Zone 8 (£m)	Zone 9 (£m)	Zone 10 (£m)	Zone 11 (£m)	Zone 12 (£m)	Zone 13 (£m)	Zone 14 (£m)	Zone 15 (£m)	**Total (£m)**	***Total (%)***
Total Available Spend - 2038		**330.9**	**228.4**	**181.2**	**232.5**	**199.6**	**236.0**	**205.0**	**92.0**	**267.7**	**431.2**	**474.4**	**36.8**	**231.6**	**255.8**	**268.1**	**3,671.3**	**100.0**
Norwich City Council Trade Draw Zone 1-15 (£m)																		
Norwich City Centre (Inc.Cathedral Retail Park)	Town Centre	252.1	169.3	115.3	99.4	129.0	133.5	136.9	51.6	120.9	109.6	93.9	12.8	76.0	87.5	104.1	**1,692.0**	**46.1**
Cathedral Retail Park	Town Centre	1.2	0.7	0.6	0.0	0.4	0.0	0.0	3.3	0.0	1.8	0.0	0.0	0.0	0.4	0.0	**8.4**	**0.2**
Anglia Square District Centre	District Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.0**	**0.0**
Riverside District Centre	District Centre	7.8	12.7	10.1	5.2	5.2	0.7	2.5	0.5	0.2	0.5	0.3	0.2	0.8	3.6	1.3	**51.7**	**1.4**
Hall Road Retail Park	Out-of-Centre	14.6	6.9	3.8	3.8	6.1	8.9	2.9	0.8	0.7	0.0	1.2	0.7	1.6	0.6	0.0	**52.5**	**1.4**
Sweetbriar Retail Park	Out-of-Centre	10.8	9.5	9.6	9.6	2.1	5.7	8.3	4.1	5.3	5.1	2.1	0.3	0.0	1.8	1.7	**75.7**	**2.1**
Asda, Hall Road	District Centre	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**0.4**	**0.0**
Asda, Hellesdon	Out-of-Centre	0.0	0.6	0.7	0.0	0.0	0.0	1.8	0.0	2.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.1**	**0.1**
Sub-total, Norwich City Council		**286.4**	**200.2**	**140.0**	**118.1**	**142.8**	**148.9**	**152.4**	**60.3**	**129.0**	**117.0**	**97.4**	**14.0**	**78.3**	**93.9**	**107.1**	**1,885.9**	**51.4**
Broadland District Council Trade Draw Zone 1-15 (£m)																		
Aylsham Town Centre	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.4	12.3	1.4	0.0	0.0	0.0	0.0	0.0	0.0	**14.0**	**0.4**
Acle	Town Centre	0.0	0.0	0.0	12.8	0.0	0.0	0.0	0.0	0.0	0.6	0.0	0.0	1.1	0.0	0.0	**14.5**	**0.4**
Reepham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	2.7	2.4	0.0	0.0	0.0	0.0	0.0	0.0	0.7	**5.7**	**0.2**
Sprowston Retail Park	Out-of-Centre	3.7	11.2	10.9	15.5	1.7	1.0	9.3	1.4	0.9	5.4	1.8	0.3	0.0	0.5	1.1	**64.5**	**1.8**
Tesco Extra, Blue Boar Lane, Sprowston	Out-of-Centre	0.0	1.7	2.8	5.1	0.0	1.9	2.0	0.0	3.1	0.0	0.0	0.0	0.0	0.0	0.0	**16.7**	**0.5**
B&Q, Boundary Road	Out-of-Centre	8.8	6.1	6.4	1.9	1.8	3.8	8.8	2.9	4.7	0.2	0.6	0.2	2.0	1.4	0.5	**50.3**	**1.4**
Sub-Total, Broadland District Council		**12.5**	**19.0**	**20.2**	**35.2**	**3.5**	**6.6**	**23.2**	**18.9**	**10.1**	**6.1**	**2.3**	**0.5**	**3.2**	**2.0**	**2.2**	**165.7**	**4.5**
South Norfolk District Council Trade Draw Zone 1-15 (£m)																		
Diss	Town Centre	0.0	0.0	0.0	0.0	0.4	4.5	0.0	0.0	0.0	0.0	0.0	4.1	89.0	0.5	0.0	**98.4**	**2.7**
Harleston	Town Centre	0.2	0.0	0.1	0.0	0.0	0.0	0.4	0.0	0.3	0.0	2.0	13.2	3.6	0.0	0.0	**19.8**	**0.5**
Wymondham	Town Centre	1.2	0.0	0.0	0.0	0.1	40.5	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.7	0.0	**43.5**	**1.2**
Loddon	Town Centre	0.0	0.0	0.0	0.0	5.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	**5.0**	**0.1**
Long Stratton	Town Centre	0.0	0.0	0.0	0.0	0.1	7.3	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	**7.7**	**0.2**
Longwater Retail Park, Costessey	Out-of-Centre	9.3	0.0	5.9	0.4	1.7	16.5	9.5	2.0	1.2	0.0	0.0	0.1	0.0	0.7	3.0	**50.3**	**1.4**
Next Home & Garden, Costessey	Out-of-Centre	0.5	0.0	0.3	0.0	0.0	0.0	0.1	0.1	2.2	0.0	0.0	0.0	0.0	0.0	0.3	**3.5**	**0.1**
B&Q Mini Warehouse, Neatmarket	Out-of-Centre	0.4	0.6	0.1	0.4	0.6	0.8	0.0	0.0	0.0	0.0	0.2	0.1	0.1	1.0	0.1	**4.4**	**0.1**
Sub-Total South Norfolk District Council		**11.7**	**0.6**	**6.4**	**0.8**	**7.8**	**69.6**	**10.1**	**2.1**	**3.7**	**0.3**	**2.3**	**17.5**	**92.7**	**3.9**	**3.4**	**232.6**	**6.3**
TOTAL GREATER NORWICH Trade Draw Zone 1-15 (£m)		**310.6**	**219.8**	**166.6**	**154.1**	**154.1**	**225.1**	**185.7**	**81.3**	**142.9**	**123.5**	**102.1**	**32.0**	**174.2**	**99.7**	**112.7**	**2,284.2**	**62.2**
Competing Destinations Trade Draw Zone 1-15 (£m)																		
Lowestoft	Town Centre	0.0	0.2	0.0	0.0	0.9	0.5	0.0	0.0	0.0	19.2	186.0	0.4	0.0	0.0	0.0	**207.2**	**5.6**
Great Yarmouth	Town Centre	0.2	1.9	0.5	48.8	3.4	0.4	0.1	0.0	2.8	143.5	2.3	0.2	0.0	0.0	0.0	**204.0**	**5.6**
Dereham	Town Centre	0.8	0.2	0.3	0.0	0.0	1.8	2.1	2.7	0.2	0.0	0.0	0.0	0.0	20.1	75.8	**103.8**	**2.8**
Beccles	Town Centre	0.0	0.0	0.0	0.0	21.2	0.6	0.0	0.0	0.0	0.7	74.4	1.0	3.2	0.0	0.0	**101.0**	**2.8**
Thetford	Town Centre	0.0	0.0	0.0	0.0	0.3	0.0	0.0	0.0	0.0	0.0	0.0	0.0	6.6	58.2	0.0	**65.2**	**1.8**
Fakenham	Town Centre	0.0	0.0	0.3	0.0	0.3	0.0	0.9	0.3	11.7	0.4	0.0	0.4	0.0	1.5	43.9	**59.7**	**1.6**
Bury St Edmunds	Town Centre	0.0	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.0	0.0	27.4	19.8	0.0	**47.5**	**1.3**
Attleborough	Town Centre	0.1	0.0	0.0	0.0	0.0	2.7	0.0	0.1	0.0	0.0	0.0	0.0	2.5	26.8	0.0	**32.2**	**0.9**
North Walsham	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	1.0	31.0	0.1	0.0	0.0	0.0	0.0	0.0	**32.1**	**0.9**
Holt	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	0.4	23.6	0.0	0.0	0.0	0.0	0.0	3.6	**27.6**	**0.8**
Cromer	Town Centre	0.0	0.0	0.1	0.0	0.0	0.0	0.0	1.2	24.0	0.0	1.2	0.0	0.0	0.0	0.1	**26.6**	**0.7**
Kings Lynn	Town Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.1	6.4	0.0	0.0	0.0	0.0	2.4	13.4	**22.4**	**0.6**
Gapton Hall Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	3.8	0.1	0.0	0.0	0.0	0.7	45.7	0.0	0.0	0.0	0.0	0.0	**50.4**	**1.4**
North Quay Retail Park, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.5	1.0	0.0	0.0	0.0	0.0	3.1	47.1	0.2	0.0	0.4	0.0	**52.2**	**1.4**
Asda, Vauxhall, Great Yarmouth	Out-of-Centre	1.8	0.0	0.0	2.2	0.0	0.0	0.0	0.0	0.0	24.5	0.0	0.0	0.0	0.0	0.0	**28.5**	**0.8**
B&Q, Pasteur Retail Park, Great Yarmouth	Out-of-Centre	0.0	0.0	0.0	2.8	0.8	0.0	0.0	0.0	0.0	15.8	4.8	0.1	0.0	0.0	0.0	**24.2**	**0.7**
B&Q, Enterprise Way, Fakenham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.2	2.1	0.2	0.0	0.0	0.0	0.0	4.7	**7.2**	**0.2**
Forest Retail Park, Thetford (inc.B&Q)	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.9	7.9	0.0	**8.8**	**0.2**
Homebase, Tower Road, Lowestoft	Out-of-Centre	0.0	0.0	0.0	0.0	0.4	0.0	0.0	0.0	0.0	0.2	6.4	0.0	0.0	0.0	0.0	**7.0**	**0.2**
Homebase, Yaxham Road, East Dereham	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.2	0.0	0.0	0.0	0.0	0.0	0.0	1.2	4.8	**6.2**	**0.2**
Homebase, Holt Road, Cromer	Out-of-Centre	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.3	4.4	0.0	0.0	0.0	0.0	0.0	0.0	**4.8**	**0.1**
Sub-Total Competing Destinations		**2.9**	**2.2**	**1.3**	**58.1**	**28.3**	**6.3**	**3.5**	**6.2**	**107.0**	**253.5**	**322.0**	**2.3**	**40.7**	**138.2**	**146.3**	**1,118.8**	**30.5**
TOTAL Greater Norwich and Competing Destinations Trade Draw Zone 1-15 (£m)		**313.5**	**222.0**	**167.9**	**212.2**	**182.4**	**231.4**	**189.2**	**87.5**	**249.8**	**376.9**	**424.1**	**34.3**	**214.8**	**237.9**	**259.0**	**3,403.0**	**92.7**
Other Destinations		**17.3**	**6.4**	**13.3**	**20.3**	**17.2**	**4.6**	**15.8**	**4.5**	**17.9**	**54.3**	**50.3**	**2.5**	**16.8**	**18.0**	**9.1**	**268.3**	**7.3**

Table 6: Comparison goods planning commitments

Proposed development	LPA	LPA planning application reference	Gross Comparison Floorspace (sq.m)	Net Comparison Floorspace (sq.m)	Assumed sales density (£/sqm net)	Average Turnover 2020 (£m)	Average Turnover 2025 (£m)	Average Turnover 2030 (£m)	Average Turnover 2035 (£m)	Average Turnover 2038 (£m)
Norwich urban area commitments										
Wickes, Hellesdon Hall Road / Sweet Briar Road, Norwich	Norwich City	15/01077/F	1,394	1,115	1,893	2.1	2.2	2.5	2.9	3.1
Sub-division of former Wickes unit, Drayton Road, Norwich (part to be occupied by Aldi)	Norwich City	14/01841/F and 15/01618/F	-1,696	-1,357	-2,100	2.8	3.0	3.4	3.9	4.2
Primark extension, Norwich city centre	Norwich City	16/00536/F	-	1,805	5,110	9.2	9.7	11.1	12.6	13.6
Sub-total for Norwich City	**-**	**-**	**-**	**1,563**	-	**14.2**	**14.9**	**17.0**	**19.4**	**20.9**
Broadland Gate	Broadland	20081773		660	2,000	1.3	1.4	1.6	1.8	1.9
North Sprowston and Old Catton urban extension	Broadland	20121516	-	1,800	-	11.7	12.3	14.1	16.0	17.3
Taverham, Fir Covert Road 'Lifestyle Leisure Unit'	Broadland		-	1,492	5,000	7.5	7.8	9.0	10.2	11.0
Sub-total for Broadland	-	-	-	3,952	-	**20.5**	**21.5**	**24.6**	**28.0**	**30.2**
Overall total for Norwich urban area	-	-	-	**5,515**		**34.7**	**36.4**	**41.7**	**47.4**	**51.2**

Greater Norwich Town Centres and Retail Study Update 2020

Comparison Need Assessment

Table 7a
Greater Norwich Comparison Goods Need Sq M Net

	NORWICH URBAN AREA COMPARISON GOODS					RURAL SOUTH NORFOLK COMPARISON GOODS					RURAL BROADLAND COMPARISON GOODS				
	2020	2025	2030	2035*	2038*	2020	2025	2030	2035*	2038*	2020	2025	2030	2035*	2038*
Total Available Expenditure (£m)	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*
Market Share from Survey Area (%)	56	56	56	*57*	*57*	5	5	5	*5*	*5*	1	1	1	*1*	*1*
Total Spend (£m)	1,233.7	1,481.6	1,655.2	*1,906.3*	*2,075.5*	102.2	123.8	138.9	*160.9*	*174.5*	20.6	24.7	27.5	*31.6*	*34.3*
Benchmark turnover (£m)	1,233.7	1,293.5	1,482.1	1,685.1	1,819.9	102.2	107.1	122.8	139.6	150.7	20.6	21.6	24.8	28.2	30.4
Sales from Commitments (£m)	0.0	36.4	41.7	*47.4*	*51.2*	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£m)	0.0	151.8	131.5	*173.9*	*204.4*	0.0	16.7	16.1	*21.3*	*23.7*	0.0	3.1	2.7	*3.4*	*3.8*
Sales per sq m net in new shops (£)	8,000	8,388	9,611	10,927	11,802	6,000	6,291	7,208	8,196	8,852	5,000	5,243	6,007	6,830	7,376
Capacity for new floorspace (sq.m net)		**18,093**	**13,677**	***15,911***	***17,315***	**0**	**2,647**	**2,238**	***2,602***	***2,680***	**0**	**587**	**452**	***498***	***520***
Capacity for new floorspace (sq.m net, rounded)		**18,100**	**13,700**	***15,900***	***17,300***	**0**	**2,600**	**2,200**	***2,600***	***2,700***	**0**	**600**	**500**	***500***	***500***

**indicative forecasts, should be subject to further review throughout Local Plan period.*

Greater Norwich Town Centres and Retail Study Update 2020
Comparison Need Assessment

Table 7b - LINK TO PREVIOUS BENCHMARK TURNOVER
Greater Norwich Comparison Goods Need Sq M Net

	NORWICH URBAN AREA COMPARISON GOODS				
	2020	2025	2030	*2035**	*2038**
Total Available Expenditure (£m)	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*
Market Share from Survey Area (%)	56	56	56	*57*	*57*
Total Spend (£m)	1,233.7	1,481.6	1,655.2	*1,906.3*	*2,075.5*
Benchmark turnover (£m)	1,547.3	1,622.4	1,858.9	2,113.5	2,282.7
Sales from Commitments (£m)	0.0	36.4	41.7	*47.4*	*51.2*
Residual Spending to support new floorspace (£m)	-313.6	-177.1	-245.4	*-254.6*	*-258.4*
Sales per sq m net in new shops (£)	8,000	8,388	9,611	10,927	11,802
Capacity for new floorspace (sq.m net)		**-21,113**	**-25,529**	***-23,295***	***-21,891***
Capacity for new floorspace (sq.m net, rounded)		**-21,100**	**-25,500**	***-23,300***	***-21,900***

	RURAL SOUTH NORFOLK COMPARISON GOODS				
	2020	2025	2030	*2035**	*2038**
Total Available Expenditure (£m)	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*
Market Share from Survey Area (%)	5	5	5	*5*	*5*
Total Spend (£m)	102.2	123.8	138.9	*160.9*	*174.5*
Benchmark turnover (£m)	133.8	140.3	160.7	182.8	197.4
Sales from Commitments (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£m)	-31.6	-16.5	-21.9	*-21.9*	*-22.9*
Sales per sq m net in new shops (£)	6,000	6,291	7,208	8,196	8,852
Capacity for new floorspace (sq.m net)	**0**	**-2,623**	**-3,033**	***-2,668***	***-2,591***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-2,600**	**-3,000**	***-2,700***	***-2,600***

	RURAL BROADLAND COMPARISON GOODS				
	2020	2025	2030	*2035**	*2038**
Total Available Expenditure (£m)	2,195.0	2,631.3	2,934.3	*3,373.8*	*3,671.3*
Market Share from Survey Area (%)	1	1	1	*1*	*1*
Total Spend (£m)	20.6	24.7	27.5	*31.6*	*34.3*
Benchmark turnover (£m)	26.5	27.8	31.8	36.2	39.1
Sales from Commitments (£m)	0.0	0.0	0.0	0.0	0.0
Residual Spending to support new floorspace (£m)	-5.9	-3.1	-4.3	*-4.6*	*-4.8*
Sales per sq m net in new shops (£)	5,000	5,243	6,007	6,830	7,376
Capacity for new floorspace (sq.m net)	**0**	**-589**	**-724**	***-678***	***-657***
Capacity for new floorspace (sq.m net, rounded)	**0**	**-600**	**-700**	***-700***	***-700***

**indicative forecasts, should be subject to further review throughout Local Plan period.*